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Setting up a Campaign

What is the purpose of setting up campaigns?

Throughout this onboarding program, you've created several marketing assets, such as emails, social posts, banner ads, and more. By setting up campaigns, you combine these different assets into a single collection, enabling you to provide a variety of resources when marketing specific products and services. Campaigns also include instructions to help you guide your partners toward success.

Once a series of campaigns are created, they are grouped to form a campaign product. (**Note:** Campaign products are covered in the next lesson.)

How do I set them up?

Before setting up a campaign, you must first create the individual assets you want to include in the campaign. Once created, follow these steps:

- 1. Create a campaign shell select desired attributes and filters
- 2. Add assets to the campaign
- 3. Publish and share with partner accounts

Once set up you can also feature select campaigns on your home page, drawing more visibility to the specific products and services you want to target.

What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

- Copy an existing campaign
- <u>Create campaign settings</u>
- <u>Create description</u> (Note: this section applies to accounts using the traditional campaign build only. Contact your customer success manager to learn which version applies to you).
- Add marketing activities
- <u>Publish campaign</u> (This step is for reference only. Publish files for partner use. Do not publish practice content created during this onboarding program.)

To complete this lesson, you must download the assets located within the <u>Packaging your Content</u> Block. Once downloaded, save each item to your local drive.



Steps

COPY A CAMPAIGN

- 1 In Content Manager, from Current Program, select Setup Content.
- 2 From the header, select **Campaigns.**

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Tactics	Templates	Dynamic Pages	Campaigns	Products	Portal Content Manager			Content Manager 👻
Campaign pla	anning will allow	you to set up and tr	ack your marketing	goals. By usin	g a mix of marketing around a p	articular subject you can touch your p	prospects multiple times to generate interes	ti
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3 Select an **existing campaign**, then select **Copy**. The Copy campaign box opens.

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Tactics Templates Dynamic Pag	es Campaigns Products Portal Content Manager								
Campaign planning will allow you to set up an	Campaign planning will allow you to set up and track your marketing goals. By using a mix of marketing around a particular subject you can touch your prospects multiple times to generate interest in your products and services.								
Folders 💊 Edit	+ New Campaign 🔅 Settings - 🛓 Copy 🗊 Delete 📴 Move 🖆 Group Related								
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	□ - Name	Language Tactics							
Campaigns	A Robot for Every Person	English (United States) Files 1							
Archive		Email 2							
resc Campaigns		Forms 1							
	Bootcamp	English (United States)							

4 Choose the **folder** for which you want to save the campaign. Then click **Save**.

Copy campaigns	
Select a folder to copy the selected campaigns and click save.	
Folder:	Campaigns 🗸
🖹 Save	Campaigns -Archive -Test Campaigns

5 Navigate to where the **copied campaign** is stored. Then from the **Name** column, click on the **copied campaign's** name.

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Tactics Templates Dynamic Pa	ages Campaigns	Products Portal Content Manager						
Campaign planning will allow you to set up and track your marketing goals. By using a mix of marketing around a particular subject you can touch your prospects multiple times to generate interest in								
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CREATE CAMPAIGN SETTINGS

- 1 From the **Settings** tab, in the **Name** text field, type **My Practice Campaign**.
- 2 In the **Brief Description** text field, type **This is my practice campaign**.
- In Thumbnail, click Choose File. Then, navigate to where the Campaign_Image.jpg file is stored.
 (Note: this image is included in your download package.)
- 4 From **Enable Campaign Views**, do not change the selected options.
- 6 From Feature, select Feature this campaign in the library.

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Campaign Informatio	n						
* Name: My Practice Campaign							
Brief Description:	This is my practice campaign.						
Language:	English (United States)						
Thumbnail:	Choose File Campage.jpg 200 x 150 pixels						
	A Robot for Every Person™ Unlocks Full Automation Potential						
Enable Campaign	n [harund]						
Views:	☑ Overview Page						
	Campaign Automation						
	Campaign Download						
Feature:	✓ Feature this campaign in the library (Expiration date will be in EST time zone)						



- 7 From What programs would you like to use this campaign in, select Setup Content.
- 8 From What attributed would like to set for this campaign, from Language, select English (United States).



9 Click Save.

CREATE DESCRIPTION

1 **NOTE**: When using campaign automator, skip this step. However, if you are using a traditional campaign build, you must update the campaign description.

Here you practice, updating an image and content in the traditional campaign build.

2 From the Description tab, click on any image to update. Click Image Library. The Image Library box opens.



3 Click Upload Image. Then click Choose file.





4 Select **Campaign_Image.jpg.** (Note: this image is included in your download package.) Then click **Save & Insert**.

Image Library		×
Team, Desi	gn\	
+ New folder	File:	
	Choose File Campaign_Image.jpg	
	★ Cancel 🖹 Save 🗄 Save & Insert	
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- 6 Click **Source**. Click **CTRL F**. This action opens the Find box.
- 7 In the Find box, type the word you want to change. Then type: Practice.



8 Click Save.

ADD MARKETING ACTIVITIES

1 From the toolbar, select **Marketing Activities**. Then select **Browse Library**.

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Tactics Tem	plates Dynamic Pages Campaigns Products Portal Content Manager						
test / My Practice Campaign							
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Quickly view and change all of the tactics that you are executing on this campaign.							
Marketing Tactics Add Tactics: Rowse library Remove 24 Sort C Share							
	Name						

2 In the **Search** bar, type **My Practice Form.** Then in the top right corner of the box, click the **+** sign.

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- 3 To add additional assets, repeat step 2 using the following search terms:
 - My Practice Email
 - My Practice Social Post
 - My Practice Banner ad
 - My Practice Uploaded File
 - My Practice File Cobranded Pdf

(Note: tactics can be applied to one campaign only).

4 Click Return to Campaign.

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	Search My Practice
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Return to Campaign	My Practice Email
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- 5 In the Marketing Tactics area, click Select All.
- 6 From the **Tactics Settings** drop-down menu, select **Share**.

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Marketing Tactics	Add Tactics: Remove library + New tactic	🗙 Sort 🗰 Publish to Accounts 🗘 Tactic Settings - 😂 Share						
	Name	Attributes 'pe	Programs					
•	My Practice Banner Ad	Share nner Ads	Setup Content					
	My Practice Email	Emak	Partner Marketing, Setup Content					
•	My Practice Form	Forms	Setup Content					
- 29	My Practice Uploaded File This is my practice uploaded file.	Files	Setup Content					
2	My Practice Cobranded PDF This is my practice cobranded PDF.	Files	Setup Content					
° in	My Practice LinkedIn Social Post This is my practice post.	Social	Setup Content					
 Return to Can 	Return to Campaign List.							



- 7 From the Share Campaigns box, in Would you like to make these messages available for pulling from the Library?, click Yes.
- 8 In When would you like this to be available in the managed library?, click Always.
- 9 In Which programs would you like to share the items with?, click Setup Content.



10 Click Next. Then click Save.



PUBLISH CAMPAIGN (THIS STEP IS FOR REFERENCE ONLY)

1 From the toolbar, click Settings.



From What programs would you like to use this campaign in, select the appropriate program. (in most cases, this will be partner marketing).

2

Note: All tactics must be published before publishing campaigns.



3 Click Save.