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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 Do not publish practice content created during this onboarding program.)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.**

VENDORLOGO			Current Program: Setup Content	Design Team 👻
Tactics Templates Dynamic	Pages Campaigns	Products	Portal Content Manager	Content Manager 👻
Campaign planning will allow you to set up	and track your marketing g	goals. By using	g a mix of marketing around a particular subject you can touch your prospects multiple times to generate interest	
Folders 🔍 Edit	+ New Campaign			
ρ	Results 1-8 of 8			Page << 1 >
	N	Name	Language	Groups

3 Select an **existing campaign**, then select **Copy**. The Copy campaign box opens.

VENDORLOGO	Current Program: Se	tup Content 🗸 🔍 Program List		
Tactics Templates Dynamic Pag	es Campaigns Products Portal Content Manager			
Campaign planning will allow you to set up an	d track your marketing goals. By using a mix of marketing around a particular subject you can tou	ch your prospects multiple times to generate interest in your products and services.		
Folders 🔍 Edit	+ New Campaign Settings - Copy 🗊 Delete 🕞 Move	p Related		
Q	Results 1-8 of 8			
Campaigns	□ ▼ Name	Language Tactics		
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Email 2				
Test 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.

VENDORLOGO			Current Program:	Setup Content 🗸	N Program List
Tactics Templates Dynamic Pa	ages Campaigns	Products Portal Content Manager			
Campaign planning will allow you to set up a	and track your marketir	ng goals. By using a mix of marketing around	a particular subject you can	touch your prospects mu	Iltiple times to generate interest in
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Campaigns		Name			Language
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Test Campaigns		Copy of A Robot for Every Person			English (United States)

#### **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.

VENDORLOGO							
Tactics Templat	es Dynamic Pages Campaigns Products Portal Content Manager						
Settings 🕞 Description 🖶 Goals 🗳 Marketing Activities 🔮 Related Campaigns							
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							
Views:	☑ Overview Page						
	Campaign Automation						
	✔ Campaign Download						
Feature:	✓ Feature this campaign in the librar (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, Design\	
+ 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.



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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Setting:	s Marketing A	ctivities
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		Search My Practice Form
Narrow y	our Search	Forms (1)
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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.

	Search My Practice
Narrow your Search	To Banner Ads (1)
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	😰 Forms (1)
	My Practice Form

- 5 In the Marketing Tactics area, click Select All.
- 6 From the **Tactics Settings** drop-down menu, select **Share**.

	VENDORLOGO Tactics Templates Dynamic Pages Campaigns Products Portal Content Manager				
🚯 Settings	🕽 Description 🛛 🗟 Goals 🛛 🕿 Marketing Activities 🔮 Related Camp	paigns			
My Practic Quickly view and cl	e Campaign range all of the tactics that you are executing on this campaign.				
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		
<ul> <li>Return to Can</li> </ul>	Return to Campaign Lat.				



- 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.