FD - P13 bis. Campaign Management

Version Control

Version	Date	Description	Author
v.1	15.03.2021	Creation	Josiane Peytraud

1. NPX Survey

It has been asked to SatMetrix to have 3 different types of Survey: Frontline, Market and GSKA.

On their side, they are preparing different notifications and questions depending on those types.

We are doing the link between our surveys and theirs with a specific object: NPX Survey. This object is populated by SatMetrix team.

Specificities for Core:

In order to be able to launch several Market Survey in parallel, we've asked SatMetrix to create 2 additional Market Surveys.

2. Campaign Creation

Any user with NPX Role can create a campaign but only those with NPX role "NPX Admin" can send it.

The Record type to use is: NPS Campaign.

There are 3 **types of Campaign**:

- MNPS: Market NPS
- FNPS: Frontline NPS
- GSKA: Global Strategic Key Account NPS

Depending on this type, we'll have different presentation of the campaign members list in the "Magic Tool" and different notifications about contact's answers.

Start and End Date: Those dates are used to determine if the Campaign is active or not.
NPS Survey: This information corresponds to the NPX Survey.
Send NPS Survey: We'll set this field to "Yes" at the time we would like to launch the survey. It must remain to "--None–" until that moment.
Survey Language: It's the language of the emails sent to the contacts.
Survey Default Language: It's the email's language which will be used when the contact's language is not one of the selected Survey Language.
Language Selection Enabled: This checkbox allows the contact to change the language of the survey he will answer. Ticked by default.

The languages of the Survey are managed in NPX. In CRM, we manage only the "communication" language. So the language of the emails sent to the contact.

As NPX is using specific codes, we need to set up a mapping. To do that:

- in the object Campaign, the languages have the NPX code as API Name
- in the object Utility, for each language for which we would like to have a specific language of communication, we indicate what is the corresponding survey language. The survey languages are defined with the NPX codes as API Name. This is helpful to indicate that when the contact's language is Catalan, then the email must be sent in Spanish for example.

Pay attention that only English is available on NPX stage (UAT). So tests concerning languages can only be done in Production.

Specificities for Core:

GBU: For GSKA Campaign, the GBU must be Corporate
NPS Champion:

<u>Specificities for ICare:</u>

Determine the FLE from Episode: This field is used to know if the FrontLine Employee must be determine from the episode or not. The default value is True.

3. Campaign Members Management

A contact can be added manually by using the button "Add Contact", from a view or from a report by using the button "Add to campaign".

3.1 Filter Campaign Members

There are 5 possible filters: Frontline Employee, Parent Account Name / Corporate Group, Account Name, Account Region, Manager of Frontline Employee.
For MNPS and FNPS Campaign, the field Frontline Employee is pre-populated with the user.
Input the value or part of the value you would like to filter on and click on the button Filter to see the result.
Click on the button "Clear" to clean all the filter selection.

3.2 Buttons of the component

- **Add Contact:** This will open a new windows with a Contact search option. When saving the contact is added to the campaign and his status is "Added"
- **Remove Campaign Member:** To use this option, you first need to select the line(s) you would like to remove then click on the button. All the selected campaign members will have the status "Rejected". Only campaign members with status "Added" or "Nominated" can be selected.
- **Add Campaign Member (Core) / Reinclude Campaign Member (ICare):** To use this option, you first need to select the line(s) you would like to re-include in the campaign then click on the button. All the selected campaign members will have the status "Added". Only campaign members with status "Rejected" can be selected.

3.3 Campaign Members Fields

Status: The field Status is the standard salesforce one. It's always set to "Sent". We use the field "Nomination Status" with the following values.

- Added => the campaign member has been added to the campaign
- Nominated => the email of the contact has been changed after processing (=> see hard bounce process for more information)
- Rejected => the campaign member has been removed from the campaign.
- Processed => The campaign has been sent and the campaign member has been created on the NPX Survey Record object.

Salutation, First Name, Last Name, Email and Function (Core) / Role (Icare) are populated with contact information. A change on one of this field will be automatically replicated on the contact. The opposite is working the same.

Episode: Available only on FNPS and GSKA Campaign. This information will be used in the survey to determine the questions the contact ill have to answer.
The values are: For FNPS CampaignAccount Management, Technical Support, Order Management, Quality Management and Business Development.
For GSKA Campaign, the same as for FNPS + Strategic Relationship.
It's not possible to have a picklist in the component. Users need to input the information manually. Take care it's case sensitive.

Account: Account linked to the Contact

Account city: City of the Account

Corporate Group (Core) /Parent account (Icare): Corporate Group / Parent Account of the Account.

Frontline Employee: The pre-population of this filed is described in the point 3.4. To change this information, there is an option on the right end of the line which will open a new window with a user search.

Type: Available only for MNPS Campaign. The pre-population of this filed is described in the point 3.4. As it's not possible to use picklist in the component, we add an option on the right end of the line to update the type.

Product Line: Available only for MNPS Campaign. Product line is more like Product Family, at least for Icare. This information is useful for the "share of wallet" question.

<u>Specificities for Icare:</u>

Primary CTD: Available for FNPS and GSKA Campaign.

Primary CSR: Available for FNPS and GSKA Campaign.

3.4 Frontline Employee and Type determination

When adding a contact to a campaign, some information (Frontline employee and Type) are automatically determined depending on the type of campaign and on the environment.
FLE = FrontLine Employee

Specificities for Core:

Campaign type = GSKA => No automatism
Campaign type = FNPS =>
Campaign type = MNPS =>

- Frontline Employee = Contact owner ? => **to be checked**
- Type =
  - Prospect if the account is a Non SAP Account
  - Churner is the account is a SAP Account and no revenue **to be checked**
  - Customer otherwise

Specificities for Icare:

If the check box "Determine the FLE From Episode is NOT ticked, then no automatism are done. Otherwise,
Campaign type = GSKA or FNPS =>

- Frontline Employee => if episode =
  - Account Management then FLE => Account owner
  - Technical support then FLE = Primary CTD. If the field is empty, access to the CTD routing matrix
  - Order Management then FLE = Primary CSR. If the field is empty, take the region CSR region (the frontline employee name should be the team leader of each region)
  - Quality then FLE will be left empty. The quality manager named will be filled manually
  - Business Development then FLE = Primary SDM. If the field is empty, take the Account Owner.
  - Strategic Relationship, no specific rule has been designed.

Campaign type = MNPS =>

- Frontline Employee = Account Manager which is the Account Owner
- Type =
  - Customer if record type = SAP account record type & Realized sales PY> 0 or CY > 0
  - Prospect if record type = (Account record type or SAP account record type) & Amount Dev Pool 3 Years Expected Close > 0 and Realized sales PY = 0 and Realized sales CY = 0
  - Churner if record type = SAP account record type & Realized sales PY = 0 and CY = 0 and Amount Dev Pool 3 Years Expected Close =0
  - Other if none of this criteria are met.

3.4 Other fields

You can select the number of Campaign Members you would like to see on the same page: 20, 50 or 100. 50 is the default value.
Button "Previous Page" to see the previous page of Campaign Members.
Button "Next Page" to see the following page of Campaign Members.
Button "Return to Campaign" to go back to the Campaign Related tab.

4. Reports

There are 2 folders to store all the reports: NPS Admin and NPS User.

In order to be able to extract all the campaign members, we've created a report named: Campaign with Magic Tool Information.