

Marketing

This is where you **send** out your text messages and email messages and where you control marketing from Kitomba.

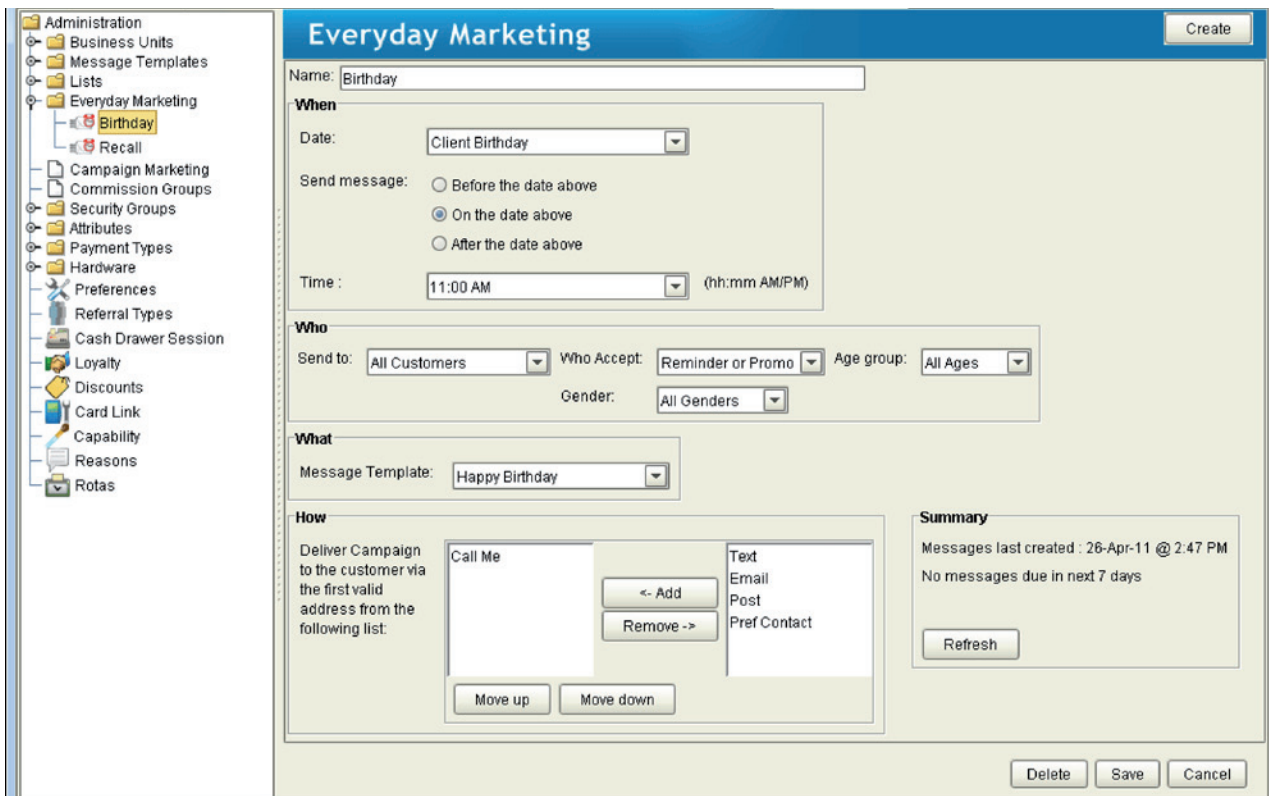
Firstly decide these things:

- Is it an everyday or campaign?
- Who will you send it to?
- What will be the message?
- When will you send it?
- How will you send it (email, text, post etc)?

Everyday Marketing

These are automatically sent messages, ie clients birthday, clients appointment reminders, new client welcome etc.

1. Name the Message.
2. Decide **When** to send, ie birthday, billing date, appointment date etc. Then decide if message is to be sent **before, on or after** that date. Enter the **time** of day to send.
3. Enter **Who** to send it to details.
4. Decide **What** message template to send.
5. Decide **How** to send, **Add** items from list on the right.*
6. **Save**.



In this example, Everyday Marketing will send a 'Client Birthday' email on the date of the clients birthday.



Campaign Marketing

These are one off campaigns, ie special offers, mothers day etc.

1. Name the Campaign.
2. Decide **When** to send, this is a manually entered specific date and time.
3. Decide **Who** to send it to, either All Customers or a list of customers you have created using the Reports tab. Lists are stored under **Lists** in the **Admin Tab**. See below.
4. Decide **What** message template to send.
5. Decide **How** to send, **Add** items from list on the right.
6. **Save**.

Marketing will deliver this campaign to all customers who have email addresses, and for those that don't, it will send them text messages.

You can also choose Call Me for customers who you don't have email or mobile phones numbers, you'll receive a CallMe prompt to telephone them. Each customer will only receive one message.

Post messages

If you've selected **Post** as one of the delivery methods you will need to print these messages (or mailing labels).

Go to the **Reports** tab and click on one of the following reports to do this:

- Messages for Printing (1 per page). This report prints out one postal message per page with the clients address located correctly for a standard window envelope.
- Messages for Printing (3 per page). This report prints out three postal messages per page in a post card format (three post cards to one A4 sheet). If using this format, message should be a suitable length to fit in the space available.
- Mailing Labels - Messages. This prints out a mailing label for each customer receiving a postal message that is suitable for a variety of postal items.

Creating a customer list using Reports

1. Create the list of the customers you wish to contact using [Reports](#) and **save** it. It will be stored under **Lists** in the [Admin tab](#).
 - To edit a List, select the list to go to the [Lists](#) screen and click **Edit List** to go to the [Select Customer](#) screen. The search results panel contains the list, you can then remove customers from the list individually using the **Remove from List** button.
 - To add clients who don't qualify according to the reports criteria, but whom you wish to receive the campaign, select **Add to List** and use the [Select Customer](#) Screen to add more customers.
 - You can also **Delete** the list from the [Lists](#) screen.

The following is a list of possible Lists (groups of customers) and the associated Kitomba report to generate them.

LIST (TO WHOM)	MATCHING KITOMBA REPORT
All Clients	Default list
New clients	Customers - New Report
Clients who have purchased a particular item(s) in a particular time period	Customers who purchase a product or service Report
Clients not seen recently who have no bookings	Customer Retention Report
Top spending clients	Customer Spend Report
Clients that match some other criteria	Customer List Report

See page 59 for running Reports.

Creating the message to send

Create the message you wish to send out using [Message Templates](#) or [kmail](#) (Kitomba mail) and **save** it. Both will be listed under [Message Templates](#) in the [Admin Tab](#), but have different icons.

The screenshot shows the Kitomba software interface. On the left, a navigation tree lists various categories, with 'Message Templates' and 'kmail templates' highlighted. The main window is titled 'Message Template' and contains a form with the following elements:

- Template Name:** We have webbookings
- Insert Parameter:** A dropdown menu.
- Short form:** A text area containing the message content: "Dear #CUST_FIRST# we now have Web Booking, request appointments online 24/7, to book go to www.soniquesalonwe...".
- Template long form - used for Kmail (Double click to edit):** A preview of a kmail message with a blue header and text.
- Use Template:** Checkboxes for 'Appointments' and 'Message Tab'.
- Buttons:** 'Delete', 'Save', and 'Cancel' at the bottom right.

Annotations on the right side of the image point to specific parts of the interface:

- An arrow points to the 'Short form' text area with the text: "Add a short form message here."
- An arrow points to the kmail preview image with the text: "kmail preview."
- An arrow points to the 'Save' button with the text: "Save any changes."

On the left side, an arrow points to the 'Message Templates' category in the navigation tree with the text: "Message templates." Another arrow points to the 'kmail templates' category with the text: "kmail templates."



Editing a campaign

If you decide you want to alter or edit the message template being used by marketing after it has been created but before it has been sent.

1. Change the **Message Template** if necessary and click **Save**
2. Change the **List** if necessary and click **Save**.
3. Make any other changes to the **Campaign** and click **Save**.

This will update the marketing campaign to take into account the changes.

Previewing a marketing campaign

Click on the template in the [Message Templates](#) list to view the message/kmail on the right panel. A kmail template will show a thumbnail of the kmail and a space for you to add a **Short Form** message like you would for a message template.

Report on a marketing campaign

Once you have created an campaign you can preview all the messages in the campaign by selecting the campaign report and the appropriate campaign in the [Reports](#) tab. *Note - this report only displays messages due in the next 7 days.*

To preview just one example of a message from an campaign go to the [Message](#) Tab and select a **customer**, select a delivery method (text or email) and then select the message template.

Marketing ideas

Everyone likes to be looked after and to be treated special. Here's a few ideas on how Marketing lets you do just that.

You can set up Marketing to automatically send out personalised birthday greetings.

Many Kitomba users use Marketing to send out personalised marketing or promotional messages. Particularly marketing material that generates business for you. Perhaps you might send a special offer for a limited time - people love a good bargain.

If you want to stay in touch with your customers, or if you want to let them know what special events are happening at your business, you can send out special notices or regular newsletters. Keep in mind you want to be telling your customers things that are of interest to them.

The fact that Kitomba can trigger a marketing campaign off any date you record on a customer file allows you to do some pretty creative things. Imagine sending a note to your customer a few days before their partners birthday, or if they saw you as part of their wedding preparation, a personal note on their wedding anniversary!

Another use of Marketing is to use it to send out personalised customer satisfaction surveys after they've been in to see you. You can get direct feedback.

Once you have created a marketing campaign you can:

- Preview how a single campaign will appear on the message tab.
- Preview all the campaigns from the Report tab (select the **Marketing report**).

If you decide you want to alter or edit the message template being used by the campaign after it has been created.

- Change the message template and click save.
- Run the marketing option from the file menu. This will update the campaign to take into account the edited message template.