**Acme Email Marketing Campaign**

Following is information on how to setup an email marketing campaign. It includes sample copy, instructions for setting up and cleaning your database, plus instructions to import and setup your CRM. Please call or email with ANY questions so we can work together to help your customers see the benefit of Acme and help you build your business.

\*\*\*\*\*\*\*\*\*\*\*\*\*\* Sample Email Template \*\*\*\*\*\*\*\*\*\*

SUBJECT: We now carry Acme - invitation to webinar

Hi {prospect name},

This is {your name} from {reseller name}.

I want to see if you can attend a short 17 minute webinar to see Acme, The #1 Best-Selling \_\_\_\_\_\_\_\_\_\_\_\_. This is a new product we've picked up to help you and other customers with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Webinar date & time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Link to register:

**About Acme**

Named one of the "Top Ten Hot \_\_\_\_\_\_ Technologies for Fall 2013" by *CRN*, Acme is the world's first and #1 best-selling full-featured, highly-available (describe your product).

It was developed by \_\_\_\_\_\_\_\_\_\_ (*former CTO for \_\_\_\_\_\_\_*) and was highlighted by \_\_\_\_\_\_\_\_ Chief Architect on stage at the previous AWS re:Invent.

Acme includes the ability to (describe top features of your product)

In fact... there are too many features to throw in this email.

**I'll See You There**

If you can make the webinar (it is not boring)--then great. If not, then pick another webinar date and you can still see a later demo--but you really ought to check it out.

You can also reply via email or phone and I'm happy to answer any questions, or setup a one-on-one session. I can also set you up with a free 30 day trial on your own servers, or on \_\_\_\_\_\_\_\_.

Let me know if you can make it,

{Your Name}

{signature (with address and phone)

**Email Marketing Campaign Setup Instructions**

This template has already been reviewed with a popular spam tester and has a low enough rating that it should make it through most filters.

**Customize the template**

You may edit the template according to customer type (i.e., education, video, enterprise, SMB, etc.). Also, tailor it to customers vs. prospects (if desired). Make sure you include your full address, etc. to fulfill spam requirements (and it actually goes through the filters better).

**Compile your list**

You can use existing *customers* or can promote to regional *prospects*. You can purchase a list and also check with Acme to see if we have any prospect names in your region (will need your zip codes/cities/state). We also have an affordable contact in India (Navin) that charges $3.33 per hour and can find your prospect websites and provide an email address or a website contact form (and can post into the forms for you)--let us know if you need his contact info.

**Cleaning a Database**

1. How to clean the spreadsheet (follow the detailed instructions below to clean data imported or entered into a spreadsheet--do NOT miss a step):
   1. Remove duplicates. Excel has a de-dupe option but it is deadly (the wrong selection will kill a LOT of good names). You can try, but test first. I recommend you sort the database by multiple categories. For example: Company name (but some resellers have multiple offices), then website, then phone, then address, then last name.
   2. Remove all commas. Some databases require we import using a "comma delimited" format (meaning it uses a "," to separate the fields). If we have commas in our data it will put the wrong info in the wrong field. I would highlight the entire database (click the top left corner) and do a replace with a semi-colon ";".
   3. Clean up the URLs. Everyone of them should ONLY have this format (www.website.com). Exceptions: it could end with .org, etc.
      1. Remove the http:// from the front (replace it with a www if possible).
      2. Remove any "/" from the back.
      3. If a website has anything other than www.companyname in front of it, i.e., partners.yourwebsite.com, the remove it.
      4. Note: when you are cleaning a particular column, it may help to resort the entire list by the column (make sure you first highlight ALL the rows/columns first (click on the top left corner)) so it puts all the inconsistencies next to each other. Sometimes you will then highlight JUST the entries with the wrong info and do a search/replace.
   4. Sort the database by first and last name. For those that are missing this information, then do a search/replace for all empty and replace the FIRST NAME ONLY with **IT Manager.** We will be sending our e-mails to the person listed as the first name and this will at least get it to the sales manager if we don't have a name.
   5. Don't worry about adding any missing titles.
   6. Sort the spreadsheet by e-mail. Create a second column called e-mail2. For JUST those blank e-mails you will copy the URL to both columns (ie., www.company.com). Then do a search/replace for just those e-mails and replace the www with "Sales@" for one column and "info@" for the other column. So you will now have two e-mails, one for sales and the other for info (the two most common e-mail locations.
   7. Sort the database by phone numbers. They all have to be consistent. Some will have (xxx), others a -, and some will have spaces between the (xxx) phone number. Remove all the leading 1's for 800 numbers. Move all the Extension to a separate column.
   8. Clean up addresses, get rid of comma's, etc. Move suites to separate column.
   9. Sort by city and zip and make sure all the same cities are spelled the same.
   10. Sort by state and make sure they all have the same abbreviations (i.e. CA versus California).
   11. Sort by city, state and zip. Compare zips to ensure that everyone has a zip code. Otherwise, put similar codes in the space. Look for missing digits. Don't worry about international.
   12. Sort by Country. Put any state, etc. info for international back under country.
   13. Save each database (rev 2, 3, etc.) before each major phase.
   14. Make sure you capture the source (where you got the name from)
   15. Type refers to the type of name. Prospect, Customer, Hospital, Government, Agency, etc. (whatever your target type - this will help customize emails in the future for a specic type of business you are targeting) Capture if it is available or guess. By default they would be PROSPECT (so fill in any missing info). We must have a type before we import.
   16. Group. Some CRMs like Salesforce can only e-mail 250 names in a batch. So, we will divide our database into batches less than 250 and give them a group name.
   17. Status. They all come in as NEW. Copy new into the entire column.
   18. We will keep any other info you obtained and decide how to deal with it later.
   19. FINAL review: Look for any odd spaces (in the front or middle)
   20. , missing fixes, etc. The data must be clean and consistent.
2. Setup your database for "campaign management". You will often send 3 e-mails to different batches and will need to keep track of who has and has not gotten them.
3. Import your names into your CRM. Salesforce can only do batches of 250 names at a time for the Pro version and 500 for the Enterprise. Check out others like ACT!, Goldmine, CallPro CRM, leadmaster, etc.
4. Create the recruiting e-mails. See the Acme template samples.
5. Send first batch. Followed by #2 and #3.
6. Rinse and repeat

**How to Setup Your CRM Database**

Following are the steps to import a spreadsheet database into your CRM/Contact Manager:

1. Clean and prepare your spreadsheet data.
   * Remove any duplicates (same address, not same name). Should already be done--but double check. Instructions above.
   * If you have multiple locations for the same company then put an \* next to headquarters.
   * If the multiple locations all have the same ( [info@company.com](mailto:sales@company.com) ) e-mail, then delete the duplicates e-mails (not the locations) until you get a unique e-mail addresses per location.
   * Put the labels for each field on the TOP of the spreadsheet and use common descriptions:
     + Company
     + First Name
     + Last Name (the program can combine, but put in separate fields whenever possible)
     + Title
     + Phone
     + Phone2
     + Fax
     + Email
     + Email2
     + Address1
     + Address2
     + County (rare)
     + City
     + State
     + Zip
     + Country (needed when your master database is world-wide (do a copy paste to put all the countries in if needed))
     + Website
     + Email Link (link to their e-mail form on their website (for those that have no visible e-mail)
     + Source (i.e, Acme, websites, contact form, etc. for the lead)
     + Type (Prospect, Customer, Government, Law Firm, Agency, etc.) - whatever vertical you target
     + Group (each batch of imports will be given a different group name (i.e., 1, 2) that helps you manage different campaigns).
     + Status (NEW – all names are imported with a NEW status, which will change as you take them through the campaign (NEW, Email1, Email1, Signed, Orientation, etc.)

* Clean the database (items below should be done (above), but be sure to complete the following:
  + Clean all Phone numbers and ensure consistent usage (801) or 801-555-3241, etc. Remove any spaces (consistency for the import to work cleanly)
  + Clean all addresses and make sure the address only contains the street number (not street, city and state, etc. on one line)
  + If you don’t have a contact name, then use “IT Manager” as first name. Don't worry about last name in these cases.
  + If you don’t have an e-mail, replace the “www.” from the company website ( [www.company.com](http://www.company.com)) with “sales@” and another copy with “info@” this will give you some chance of guessing their e-mail.
  + Make sure all addresses have states and they should only be the standard two-letters. Resort all rows by phone number to use area codes to match states if you are unsure.
  + Global: Remove all comma’s (“,”) since many imports use commas as field delimiters. Replace them with another character (semi-colon works ;)
  + Remember to add the source where you captured the name, plus add a group # (each time you import a list, that group starts a new campaign—so change the group # each time you import a new list), add type and status.
* Database decisions. You will have to make the following decisions:
  + Do you combine your new leads with existing customers and prospects, or do you use a separate database?
  + Do you combine alliances, vendors and everyone else in the same database?
  + I recommend you have a SINGLE database and that every contact has a different type (Alliance, Vendor, Prospect, Client, etc.). This way you can link leads to alliances, keep a permanent record (so you don't get a new database and bug an opt-out vendor).

2. Next, setup the fields within your CRM database

* Contact Type: Customer, Prospect, Alliance, Vendor, Industry (list targets), etc.
* Website E-mail Form (to put the link to their e-mail form)
* Group: 1, 2, 3 (to identify which import group they are part of)
* Status: New, email1, email2, email3, NI, Applied, Denied, Approved, Orientation, 1st Sale, Trained

3. Create a test database

* Create a small subset of your spreadsheet data (top 5 names with label)
* Import the subset and map the fields to test if they import correctly. Re-test until it is clean.
* IF it looks 100% clean, then erase the test and start the final import

4. Make sure all your live database info is clean and complete (using same info as step 2 above).

Backup your existing database. Now, import data into the live database.

3. Setup e-mail

* Create the reseller recruiting template and test by sending it to yourself and about 3 internal contacts. Confirm it worked.
* Create filters to pull up the group and run different campaigns

5. Campaign management

* Learn how to do global changes to fields to change status
* Set a filter for group one, e-mail1 and send out first batch of emails.
* Change status to email2, then repeat
* Remember to change the status to NI if the account opted out, or to Approved if they signed up, etc.
* Different CRMs handle campaign management differently, so some of these steps may need to be done differently.

You may get new reseller lists later from alliances, list brokers, or new web searches and will need to follow this process again. The primary difference is that you will usually have to export your database so you can de-dupe and combine in your spreadsheet first. Some CRMs have excellent de-duping and combining features, others do not, so you'll have to adjust accordingly.

**Marketing Automation**

You may marketing automation software or an email application like Constant Contact, Email Marketer, etc. Some of the information above may be helpful but you will have to modify it to your own system.

**Contact**

Call Acme Channel Marketing if you need any help with any of these steps. The first time takes much longer but it goes quick with these steps and as you continue the process.

Ted Finch  
tedfinch@Acme.com  
Skype: YourSkypeName  
Phone: xxx-xxx-xxxx