

Lesson 3.3 – Creating a Marketing Campaign Element



Objective

At the end of this lesson, you should be able to:

- Create a Campaign Element



Summary

Campaign Elements are a group of print ads, product promotions, marketing events, and other related promotional materials and activities designed for use within a Marketing Campaign. A Marketing Plan and a Marketing Campaign must exist before a Campaign Element can be created.



Contents

- Creating a Campaign Element

Lesson 3.3 – Creating a Campaign Element






Creating a Campaign Element

Once a Marketing Plan and a Campaign are created, then a Campaign Element is created.


Tab Navigation: SAP Portal >> Campaign Management >> Campaigns

1. On the **Marketing Planner** screen,
2. Select the **Campaign**.
3. Click on the **Create** button.

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4. Select the **Campaign Element** checkbox.
5. Enter the name of the Campaign Element in the *Identification* field.
6. Enter the description of the Campaign Element in the *Description* field.
 Keep in mind that the *Description* field only supports 40 characters.
7. In the *Planned Start* field, select the **Calendar** icon.
 A calendar appears allowing you select the start date of your Campaign Element.
8. In the *Planned Finish* field, select the **Calendar** icon.
 A calendar appears allowing you to select the end date of your Campaign Element.
9. Click on the  **Save** button to save your data.
10. On the **Basic Data** tab in the **General Data** section select the appropriate type of Campaign Element from the **Type** drop-down list.
 Nine options appear
 - a. **Corporate Branding**
 - b. **Event Promotion**
 - c. **Name Qualification**
 - d. **Newsletter/Magazine Subscription**
 - e. **Product Promotion**
 - f. **Sales Follow-Up**
 - g. **Seminar Promotion**
 - h. **Solution Promotion**
 - i. **Training Promotion**

11. In the **General Data** section, select the appropriate objective for the Campaign Element from the **Objective(s)** drop-down list.

 Four options are available. This menu will change based on the type of campaign selected in the *Type* field.

- a. **Brand Awareness**
- b. **Direct Sales**
- c. **Events/Seminar Attendance**
- d. **Lead Generation**

12. In the **General Data** section, select the appropriate tactic for the Campaign Element from the **Tactic** drop-down list.

 Seven options appear


- a. **Email**
- b. **Fax**
- c. **Physical Mail**
- d. **Print Ads**
- e. **Search Ads**
- f. **Seminar**
- g. **Web Banner Ads**

13. In the **General Data** section, select the appropriate priority for the Campaign Element from the **Priority** drop-down list.

 Four options appear

- a. **High**
- b. **Low**
- c. **Medium**
- d. **Very High**


14. Click on the **Status** tab.

 The **Status** tab displays the name of the person who created the Campaign Element and the date and time it was created.


15. Click on the **Notes** tab.


 In the **Text Type** drop-down list there are two options:

- a. **Notes** – select “Notes” to enter any notes relevant to the Campaign Element.
- b. **Description** - select “Description” to further define the Campaign Element.


 In the *Language* drop-down list, you will notice that the ‘language’ selected by the R/3 System has already been entered.

16. Click on the **Attachments** tab.

 Here you can attach or upload all documents that support your Campaign Element (e.g.; spreadsheets, emails, notes from a meeting, etc).

17. To add an attachment, click on the **Add** button. The **Add** section appears.
18. Click on the **Browse** button to locate the file you wish to attach to the Campaign Element.
19. Once you have located the document that you want to attach to your Campaign Element, enter the name of the document in the *Add with Name* field.
 Naming the file will help keep the documents organized

20. On the **Channel** tab in the **General Data** section, select the appropriate communication medium for your Campaign Element from the **Communication Medium** drop-down list.


 Eight options appear


- a. **E-mail**
- b. **MKT Direct Mail**
- c. **MKT E-mail**
- d. **MKT Fax**
- e. **MKT Lead**
- f. **MKT Phone**
- g. **MKT Seminar Tradeshow**
- h. **Phone**

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21. On the **Channel** tab in the **General Data** section click on the **down arrow** in the *Form E-mail* field to select the appropriate e-mail form.
22. The **Mail Preview** icon appears next to the **drop-down arrow** in the *Form E-mail* field. If you want to preview the e-mail from, select the **Mail Preview** icon.
23. Enter the E-mail address in the *E-Mail Address* field under the **Channel** tab in the Parameters section.

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24. Click on the **Segments** tab.
25. On the **Segments** tab of the **Campaign Element** screen, click on the **Add Entry** button to add the name of the target audience that the Campaign Element is designed or has been designed to reach.
26. Click on the  **Save** button to save your data.
27. You can now release the higher-level Marketing Plan and Campaign.
28. Click on the **Status** tab.

29. Click on the **Change Status** button to change the status of the Marketing Plan and Campaign Element.
30. The **Action** screen displays.
31. Click on the **Status** tab.
32. Click on the **Change Status** button to change the status of the Campaign Element.
33. The **Action** screen displays.
34. To release the Campaign Element, select the **Release** checkbox.
35. Click on the **Status** tab again.
36. Select the **Change Status** button.
37. The **Action** screen displays.
38. Select the **Release** checkbox to release your Campaign.
39. Click on the **Segments** tab.
40. Select the **Target Group to Channel** button to select the Target Group that you are releasing the Campaign to.
41. Click on the  **Save** button to save your data.