Tracking advertising & promotional campaigns

A great deal of time and money can be spent on promoting your business. So, it is important to know how successful your campaign was. There are a number of ways to make it is easier to track your campaign, for example, if customers can bring in a card, ad, coupon, etc.

Whatever type of campaign you are running, you need to be able to measure it in several different ways.

Answering these 4 questions, should give you a good start.
A. Did the customer make a purchase during the campaign?
B. Of the customer's who made a purchase during the campaign, how did their purchase compare to your shop average?
C. Did the customer make subsequent purchases after the sale or were they a one-time shopper?
D. Did you attract new customers during your promotion?

A. Did the customer make a purchase during the campaign?
In order to answer this, you need to know two things:
1. Who is eligible to purchase?
2. Who did purchase?

If you mailed a promotional card/coupon/flyer to a group of clients in your Contacts file, you can document it under the Date/Notes tab for every person all at once with one button.
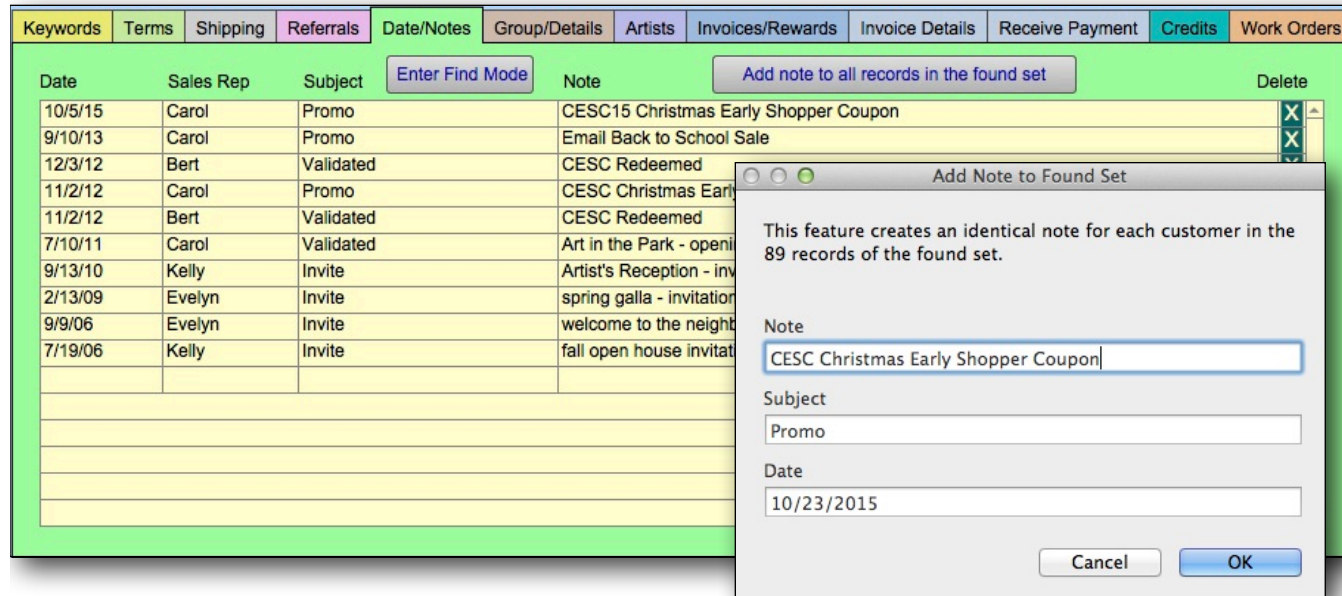
Here's How:
1. Find the group of records in your Contacts file to whom you wish to market, and export the list for mailing or print your address labels
2. Click on the Form View button (top center) and, in this one customer's record, click on the bright green "Date/Notes" tab.
3. In the tab, click on the grey button entitled, "Add note to all records in the found set".

4. Enter the code or words to describe your promotion. Codes can be easier to search while individual words can give you broader results. (Eg. Find anyone who has received any type of "coupon" or find only "CESC" clients.) The current date is automatically entered.
5. Click Okay and the same note will be entered on every record in your found set.

The next step is to set up an easy way to track the usage of the promo piece by creating a record in the Product File specifically for this one promotion. You can have multiple promotion records and have a barcode on the card/coupon/flyer to let you scan it quickly onto their invoice.

Here's How:
1. Create a new record in the Products file by clicking on New Product from the Main Menu
2. Change the item # to match your code (CESC-2015)
3. Enter the Description which will appear on the invoice
4. Select Promotion as the category. If it is not in the pop up list, type it directly into the Category field. This will add it to your list for future use.
5. If your promotion is for a dollar value, you can enter the amount into the retail field as a negative number. If it is for a percentage, you can leave the field blank and fill it out when the invoice is created.
6. In the IN box, enter in the number of promotional pieces you have printed, mailed, or distributed.

TRACKING:
Each time the item # is entered on an invoice, the program will count how many promos were redeemed. FrameReady will track each time this code is used; when it is started, how many are redeemed, when it is used and the turn around time. (see report on page 4: REPORT ON INVOICE)

The final step is to enter the promo code on the invoice when the customer makes a purchase.

Here's How:
1. After creating the invoice, click on the Search Item button (magnifying glass) and type or scan the promo code into the Item # field and click the Search button. The information related to the code will be entered.

To enter a percentage coupon instead of a dollar amount:

1. Enter the amount into the % field as a decimal to see the dollar value in the Savings field.
2. Drag the amount that appears in the Saving field into the Unit Price field and delete the % number so that you do not give the discount twice.

Tip: You may want to change your Description to identify the percentage amount of the discount. Eg. "10% Off Custom Framing".

TRACKING:
1. In the **Products** File, the record you created for this promotion will identify how many coupons/cards/promos have been redeemed.
2. In the **Invoices** File, perform a Find for your promotional code (Eg. CESC). At the bottom of the list view, you will see the total amount spent because of this promotion and, in the Saving column, how much money was discounted in order to bring in the sales. This is part of the cost in running the promotion.
3. In the **Contacts** file, perform a find for the customers with the mailing code in their note field (Eg. CESC Christmas Early Shopper Coupon) AND, before you click perform find, also enter the date range for your campaign in the Invoice Date field. This will find all customers who were on your list and responded to your campaign.
Tip: Enter a new note in all of these records to identify them as responding to your promotion. Eg. CESC Redeemed.

REPORT ON INVOICE:

To see the amount of money that came in during your promotional period, perform a find in the Invoice file for the coupon item# on invoices created during that time period. A list of invoices will be presented showing the total number of sales, in the top left corner, the total sales, etc.

If your promotion was a dollar discount, you can multiply the number of invoices by the coupon amount for the cost of the promotion. If it was a percentage discount, the total will appear in the Savings column.

												Print Packing List for Marked Rec
1 of 7 Total: 552 (Unsorted)												
Marked	Inv #	Date	Sold To	Subtotal	Savings	Subtotal	CTax	STax	Total	Payment	Balance	Status
☐	100551	10/5/15	Jack Spry	217.51	-18.30	199.21	5.98	9.96	215.15	-215.15	0.00	Paid in Full
☐	100552	10/6/15	Charming Prints	213.39	0.00	213.39	6.40	10.67	230.46	-115.23	115.23	Deposit
☐	100553	10/6/15	Mary Poplar	763.00	-72.79	690.21	20.71	34.51	745.43	-372.72	372.71	Deposit
☐	100554	10/6/15	Sarah Wallace	220.27	-19.15	201.12	6.03	10.06	217.21	-108.61	108.60	Deposit
☐	100555	10/7/15	SoftTouch Solutions Inc	90.00	0.00	90.00		4.50	94.50	-94.50	0.00	Paid in Full
☐	100556	10/8/15	Barbara Nicholas	107.62	0.00	107.62	3.23	5.38	116.23	-116.23	0.00	Paid in Full
☐	100557	10/9/15	Carol Graham	119.93	0.00	119.93	3.60	6.00	129.53	-129.53	0.00	Paid in Full
			Totals	1731.72	-110.24	1621.48	45.95	81.08	1748.51	-1151.97	596.54	

B. Of the customer's who made a purchase during the campaign, how did their purchase compare to your shop average?

You want to be able to determine the type of customer your promotion attracted. Were they discount shoppers looking for a deal? Did they bring in more than one item?

You can determine your shop average before the sale and after the sale, by clicking on **Main Menu** > **Work Order** section > **Reports**. Enter a date range prior to the promo to determine your **Average Unit Price**, **Average Dollars Discounted** and **Average UI Price per Orde**r for that time period. Then run the same report for the period of the campaign.

TRACKING:

There are 3 ways to track the individual work orders created because of your promotion. You can enter your promotion code into either the Designer field on the work order, the **Notes** field for the work order (button in top right or tab in lower right) or in the **Other** field. This will make it easy to find the selected work orders later and scroll through them to see the details.

REPORT ON WORK ORDERS:

If the promotion campaign only pertains to framing, then you can use the **Designed By** field on the work order to enter the name of the campaign and create a detailed report which identifies the **Total Pieces**, **Orders**, **Sales**, **Average Unit Price** and **Average Dollars Discounted**.

The Report by Designer shows how the sales were brought in. Regular orders are blank but designers and campaigns are also listed for the time period you specify. You can quickly see the value of your promotion (Eg. Promo 10 - for 10% off), which amounted to 7 orders of 10 Pieces. The Totals Sales shows the dollar value ($2998.73). It also shows the cost of the sale in **Total Dollars Discounted** (Eg. $288.18). The size of the art brought in was larger (Eg. 63 UI) but the **Average UI Price Per Order** (Eg. $6.73) was lower.

How to create this report here.

Report Sorted by Designer
8/1/2015...

Designer	Total Pieces	Total Orders	Total Sales	Average Unit Price	Average Dollars Discounted	Total Dollars Discounted	Total UI	Average No of UI Per Order	Average UI Price Per Order
	9	9	2,290.44	267.04	12.55	112.91	348	39	7.39
Doreen	1	1	1,206.71	1,206.71	0.00	0.00	49	49	24.63
Promo 10	10	7	2,998.73	411.70	41.17	288.18	565	63	6.73
	20	17	6,495.88	381.88	23.59	401.09	962	49	8.13

OTHER REPORTS:

If you perform a find for the work orders created during the sale, you may want to look at other reports. Click on the Print Documents button to select: Glass usage (if you were promoting a certain type), Moulding/Matboard Usage, Moulding Usage by Supplier, or wholesale cost report.

C. Did the customer make subsequent purchases after the sale or were they a one-time shopper?

It isn't enough to test the campaign on the expiration date, another test is to find out the value of the customers you have added to your list (if new).

TRACKING:

1. In the **Contacts** file, perform a find for the customers with the redeemed code in their Notes field (Eg. CESC Redeemed) AND, before you click perform find, also enter the date range after your campaign ended in the Invoice Date field followed by three periods. (Eg. 12/2/12...) This will find all customers who came in because of the campaign and have since made an additional purchase. *Be sure to give it some time - 3 months, 6 months, one year.*

2. Find all customers who didn't make a purchase during the campaign but did make a later purchase. In the **Contacts** file, perform a find for the customers with the mailing code in their note field (Eg. CESC Christmas Early Shopper Coupon) AND, before you click perform find, also enter the date range after your campaign ended in the Invoice Date field followed by three periods. (Eg. 12/2/12...) *This has special significance if you were mailing to a new client list you purchased.*

D. Did you attract customers during your campaign?
Each customer record entered into FrameReady is a date stamped on the date of entry which makes it easy to track new customers during a campaign period.
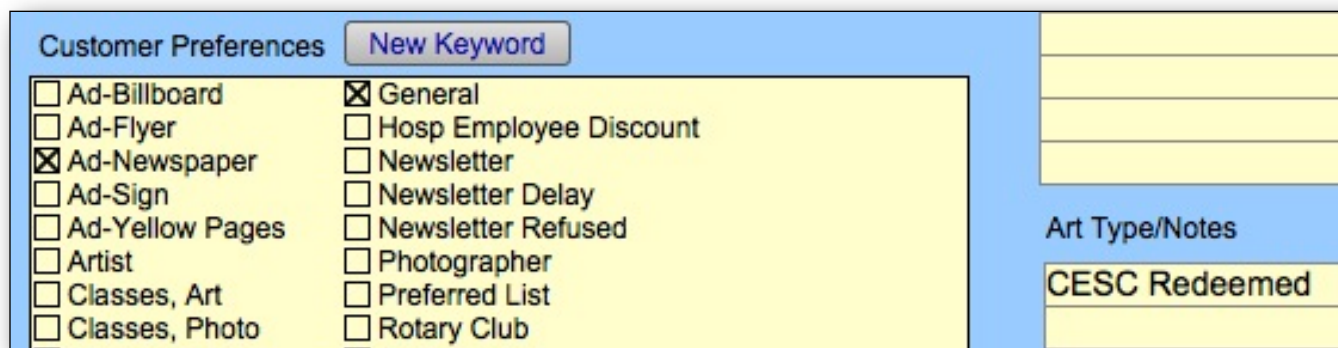You can perform a find for new contact records to see all new customers, but to truly test a campaign, you will want to track your campaign you verify that they came in because of your ad, coupon, flyer, etc.

TRACKING:
When entering in a new customer, be sure to mark the Keyword for the method of advertising which drew them in. Learn to add Keywords here.

Another option is to enter the Promo code into the Art Type/Notes field which appears in the Date/Notes tab in the Contact file.

Using one or both of these fields will provide you with good tracking.

REPORT ON CONTACTS:
Perform a find for contact records created during your campaign. You can also perform a multiple field find of new contacts during the time period who redeemed your coupon.

Marked	ID#	First Name	Last Name	Company	Address	City	State	Zip	Country	Rank	Spent	Primary Email
☐	10001	Bert	de Roo	SoftTouch Solutions	4179 Petrolia Line, Suite 1	Petrolia	ON	N0N 1R0	CANADA	3	225	softouch@mnsi.net
☐	10011	Mary	Winson	Charming Prints	PO Box 4689	Hermitage	PA	16157	USA	4	213	
☒	10020	Sarah	Wallace		245 Alice Dr	Niagara Falls	NY	14286	USA	5	201	
☐	10024	Wesley	Bailey		PO Box 4928	Wyandotte	MI	48193	USA	1	1,001	bob@mendola.net
☐	10057	Carol	Graham		PO Box 1439	Petrolia	ON	N0N 1R0	CANADA	7	120	softtouchsolutions@me.
☐	10293	Barbara	Nicholas			Riverside	CA	12345	CANADA	8	108	
☐	10416	Jack	Spry		22 Willowtree Dr	Petrolia	ON	N0N 1R0	USA	6	199	jspry22@gmail.com
☐	10417	Mary	Poplar		45 Carousel Dr	Petrolia	ON	N0N 1R0	USA	2	690	mpoplar99@gmail.com

1 of 8 Total: 152 (Unsorted) Export Email Addresses Print Address Labels Clear Ranking Show/Hide Keywords

The list will show the number of customers in the top left corner, the dollar value they spent and, if you got their address, from where you are drawing in your new customers. (You can use the Map button in FrameReady to see the location.)

To have the dollar value calculated, run the Customer Report from the Main Menu > Sales Report. Full instructions here.

Promotional campaigns can provide great benefit to your business but there is no one perfect promotion that will work for every business. You will need to investigate, research, experiment and evaluate the results. If you fail to track the promotion, you are gambling with your advertising dollars each time you put money into your next promotion without knowing the benefits and downfalls of the previous one.