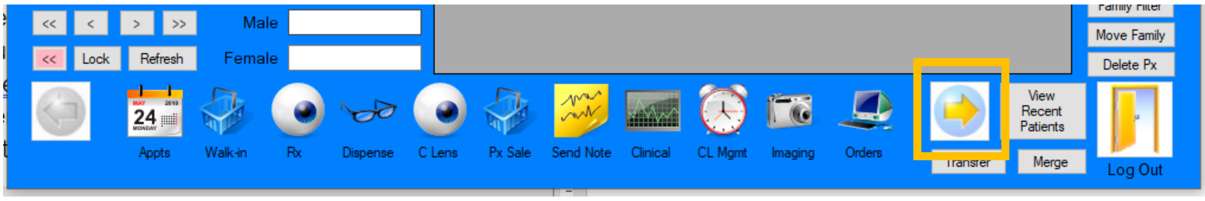
The Marketing Module

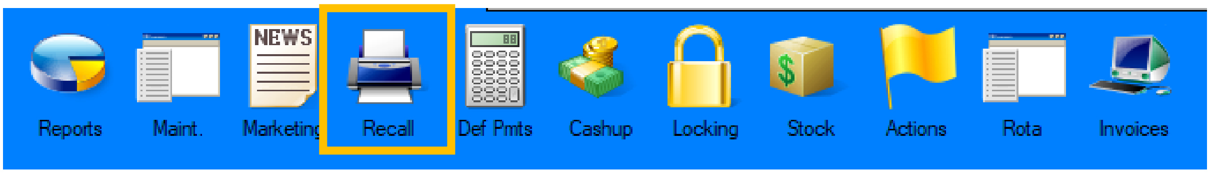
i-Clarity Version 3.3.2

To access the marketing module, click on the yellow arrow on the right-hand side of the module icons at the bottom of the page.



This will display a new set of icons.

Click on the new icon called 'Marketing'.



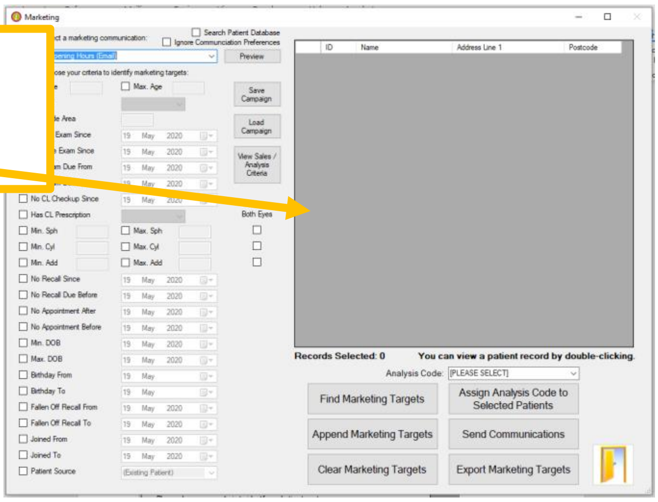
Uses of the Marketing Module

By default, when you open the marketing module it is set to marketing mode which means it will only list and communicate with patients that have the appropriate communication preferences.

You will need a marketing communication set up to use the module in marketing mode. (see page 17)

- If a letter communication is selected, any patients who have 'stop all marketing' will <u>not</u> be shown in the marketing targets list.

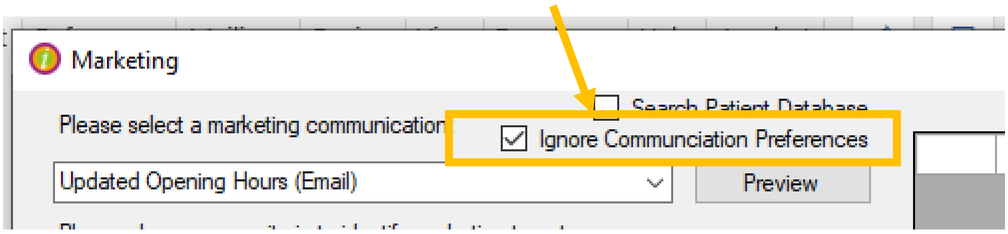
The list of patients who match the filters and communication preferences are considered 'Marketing Targets' and will be listed here.



- If an email communication is selected, then only patients who have an email with 'Yes' selected to the option 'Email news updates' will be listed. (Email news updates is an option on the front tab of the patient record). Patients with 'stop all marketing' will <u>not</u> be shown in the marketing targets list.

- If an SMS communication is selected, then only patients who have a mobile number with 'Yes' selected to the option 'Contact by SMS?' will be listed (Contact by SMS is an option on the front tab of the patient record). Patients with 'stop all marketing' ticked will <u>not</u> be shown in the marketing targets list.

To use the marketing module to send an information communication to all your patients and ignore the marketing communication preferences then tick the box at the top of the screen called 'Ignore Communication Preferences'.

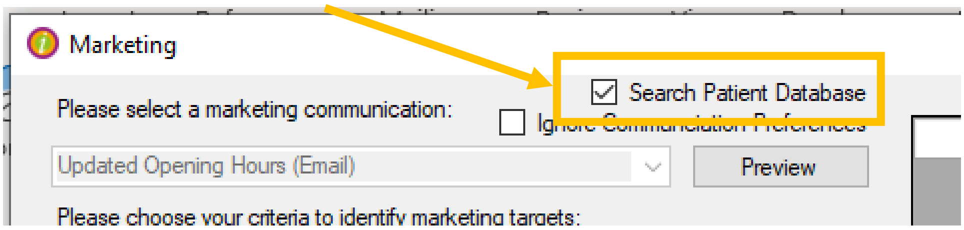


- If a letter communication is selected, then all patients with an address will be shown in the marketing targets list.

- If an email communication is selected, then patients who have an email address with either 'Yes' or 'No' selected to the option 'Email news updates' will be listed.

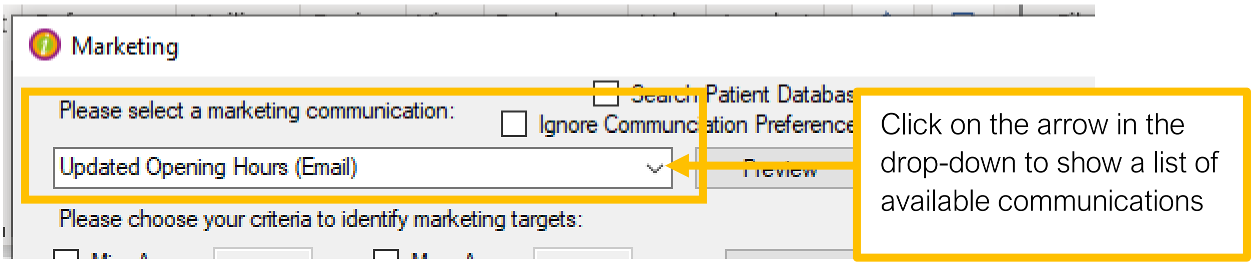
- If an SMS communication is selected, then patients who have a mobile number with either 'Yes' or 'Recall Only' selected to the option 'Contact by SMS?' will be listed.

Researching your patient database. You can also use the marketing module to research your patient database and see how many, and which types of patients fall into different demographic selections. To ignore all communication preferences and search the patient database tick the 'Search Patient Database' box. All patients will be included in the list.

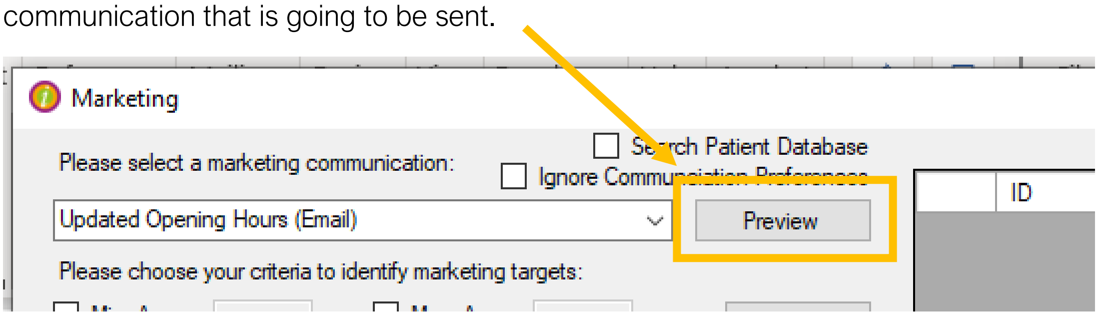


Selecting a communication

The available marketing communications that can be sent from module are listed in the drop-down at the top of the screen.

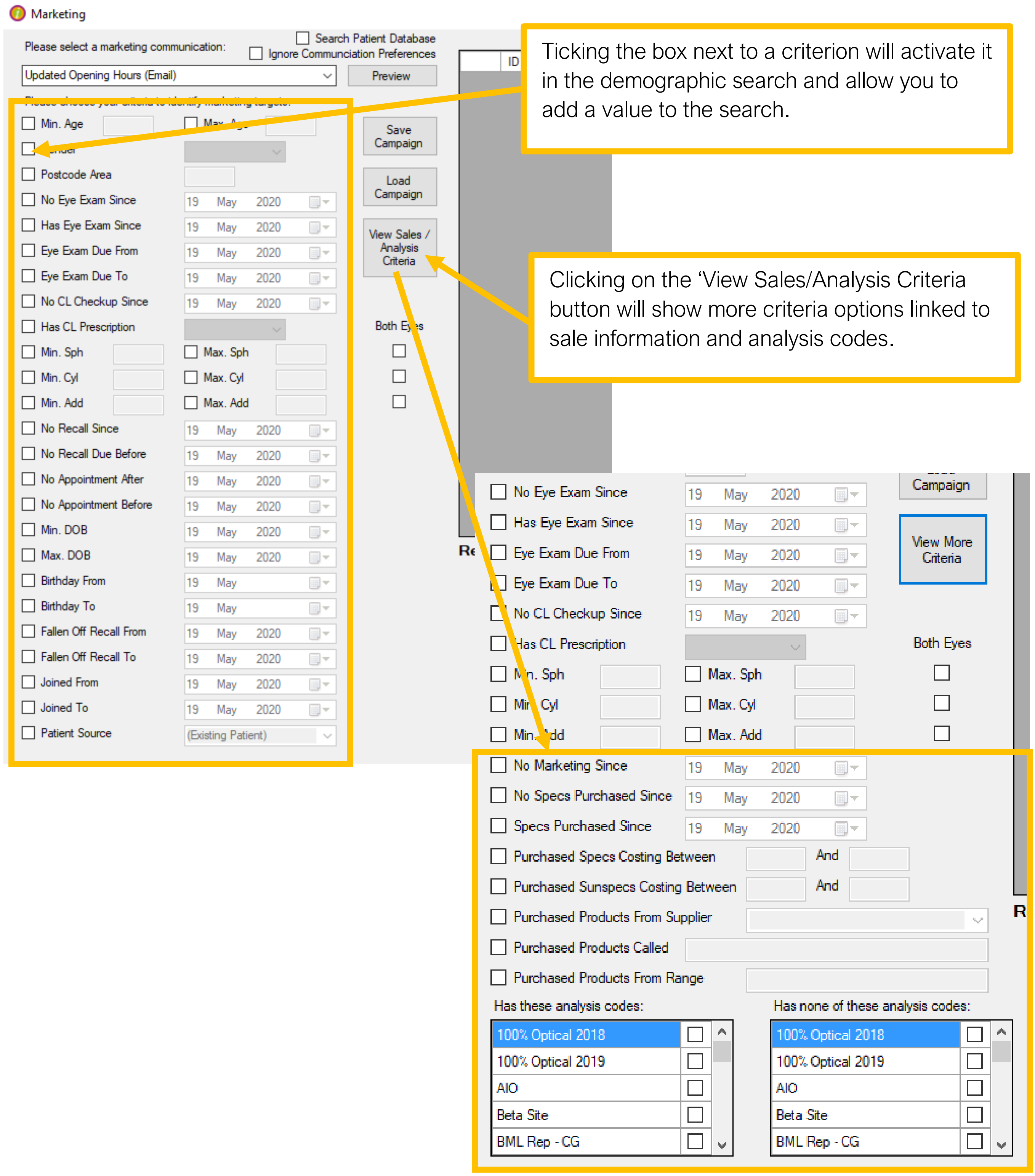


Clicking the ‘Preview’ button next to the drop-down list will show a preview of the communication that is going to be sent.



Filtering the Marketing List

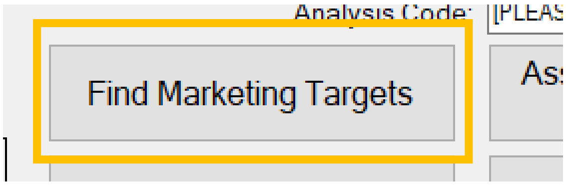
The criteria available down the left-hand side allows you to use your patient demographic information to create a targeted marketing list.



Criteria Field name	Details of calculation of criteria
Postcode area	Looks for patients whose postcodes start with this value (e.g. CF or CF1)
No eye exam since	Looks at patients most recent prescription date not counting re-test, non-sight-test, and non-sight-test-valid-rx.
Has eye exam since	Looks at the patients most recent prescription date not counting re-test, non-sight-test, and non-sight-test-valid-rx
Eye exam due from	Looks at the next due date of a patient's most recent prescription, not counting re-test, non-sight-test, and non-sight-test-valid-rx
Eye exam due to	Looks at the next due date of a patient's most recent prescription, not counting re-test, non-sight-test, and non-sight-test-valid-rx
No CL check-up since	Looks at the patient's most recent CL prescription of any type (unless created from the trials form and not brought through to CL rx)
Has CL prescription	Looks at patients with any CL prescription of any type (unless created from the trials form and not brought through to CL rx)
Min sph	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max sph	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Min cyl	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max cyl	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Min add	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
Max add	Patient's most recent prescription not counting re-test, non-sight-test, and non-sight-test-valid-rx
No marketing since	Will only include patients in the list that have not received a marketing communication since the specified date, looks at the patient communication tab and the communications sent and marked as marketing and not part of a recall scheme
No specs purchased since	Looks for patients that have not had a transaction with a 'SPECS' reference since the specified date
Specs purchased since	Looks for patients that have had a transaction with a 'SPECS' reference since the specified date
Purchased specs costing between	Looks for patients who have had transactions with a 'SPECS' reference that have a value between the amounts entered

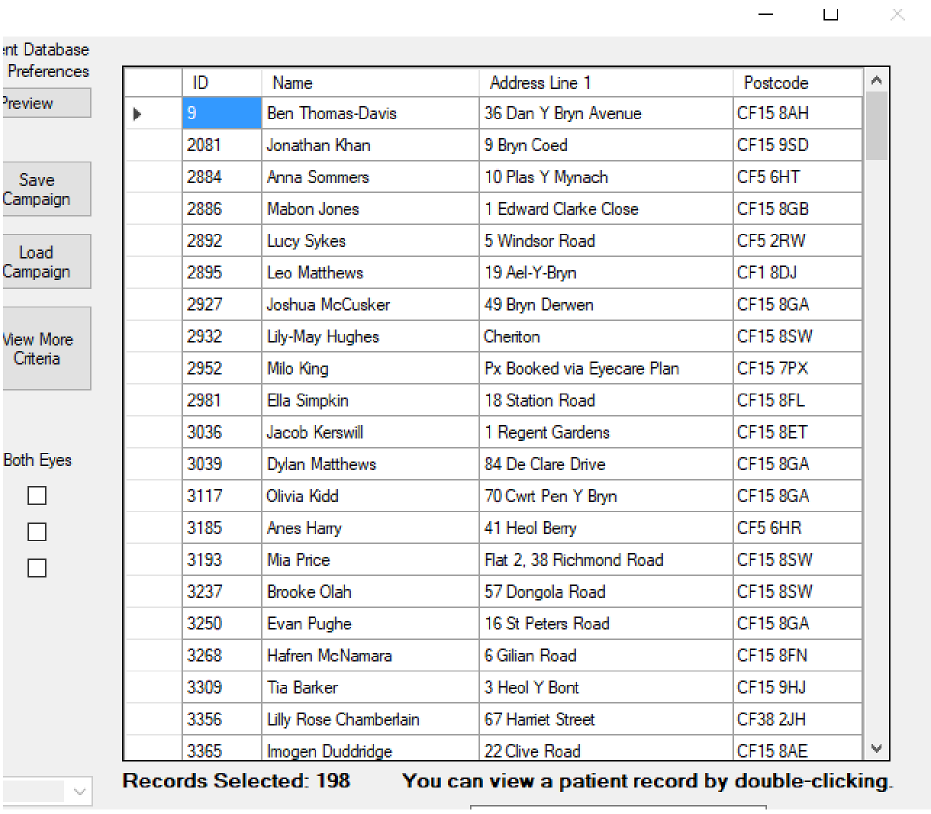
Purchased sunspecs costing between	Looks for patients who have had transactions of a product group of Sunspecs with a value between the amounts entered
Purchased products from supplier	Looks for patients who have transactions of a product that is linked to the supplier entered
Purchased products called	Looks for patients who have transactions with a product description containing the text entered
Purchased products from range	Looks for patients who have transactions of a product where the product range contains this text
Has these analysis codes	Looks for patients that have this analysis code selected. If more than one analysis code is selected in this box, then the patient must have all the codes to be included in the marketing target list.
Has none of these analysis codes	Patient is excluded off the marketing target list if they have any of the selected codes assigned.
No recall since	No recall communications sent to the patient since the specified date
No recall due before	Patient has no unsent recall communications due to go before this date
No appointment after	Patient has no appointments booked after the entered date. Looking at the appointment diary for all branches.
No appointment before	Patient has no appointments booked before the entered date. Looking at the appointment diary for all branches
Fallen off recall from	Patient's recalls are not stopped, there is no recall communication due to be sent, the last recall was sent on or after this date, and the patient has no appointment booked today or in the future
Fallen off recall to	Patient's recalls are not stopped, there is no recall communication due to be sent, the last recall was sent on or before this date, and the patient has no appointment booked today or in the future
Joined from	Looks for patient records who have a join date (auto created on further details tab of patient record) after the entered date
Joined to	Looks for patient records who have a join date (auto created on further details tab of patient record) before the entered date
Patient source	Patient has the selected patient source option selected on their patient record (further details tab)

Once you have selected all your relevant criteria. Click the button ‘Find Marketing Targets’.



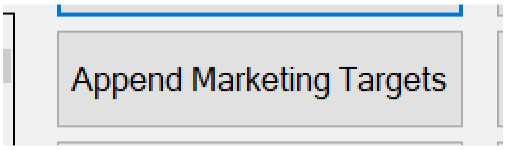
Clicking this button will search your patient database for patients whose demographics fit the selected criteria.

Once complete the marketing targets will be listed in the box on the right had side and the number of patients listed will be shown just below.



ID	Name	Address Line 1	Postcode
9	Ben Thomas-Davis	36 Dan Y Bryn Avenue	CF15 8AH
2081	Jonathan Khan	9 Bryn Coed	CF15 9SD
2884	Anna Sommers	10 Plas Y Mynach	CF5 6HT
2886	Mabon Jones	1 Edward Clarke Close	CF15 8GB
2892	Lucy Sykes	5 Windsor Road	CF5 2RW
2895	Leo Matthews	19 Ael-Y-Bryn	CF1 8DJ
2927	Joshua McCusker	49 Bryn Derwen	CF15 8GA
2932	Lily-May Hughes	Cheriton	CF15 8SW
2952	Milo King	Px Booked via Eyecare Plan	CF15 7PX
2981	Ella Simpkin	18 Station Road	CF15 8FL
3036	Jacob Kerswill	1 Regent Gardens	CF15 8ET
3039	Dylan Matthews	84 De Clare Drive	CF15 8GA
3117	Olivia Kidd	70 Cwrt Pen Y Bryn	CF15 8GA
3185	Anes Harry	41 Heol Berry	CF5 6HR
3193	Mia Price	Flat 2, 38 Richmond Road	CF15 8SW
3237	Brooke Olah	57 Dongola Road	CF15 8SW
3250	Evan Pughe	16 St Peters Road	CF15 8GA
3268	Hafren McNamara	6 Gilian Road	CF15 8FN
3309	Tia Barker	3 Heol Y Bont	CF15 9HJ
3356	Lilly Rose Chamberlain	67 Harriet Street	CF38 2JH
3365	Imogen Duddridge	22 Clive Road	CF15 8AE

Append Marketing Targets



The append marketing targets button allows you to create one marketing target list from two different sets of criteria.

Select your first set of criteria and click find marketing targets, this will generate a list of patients who fit the search. Then reselect the criteria for your next search and click append marketing targets. This will add the new list of patients to the original list, creating one set of marketing targets to send communications to.

This feature is especially useful when using the analysis code criteria to select patients.

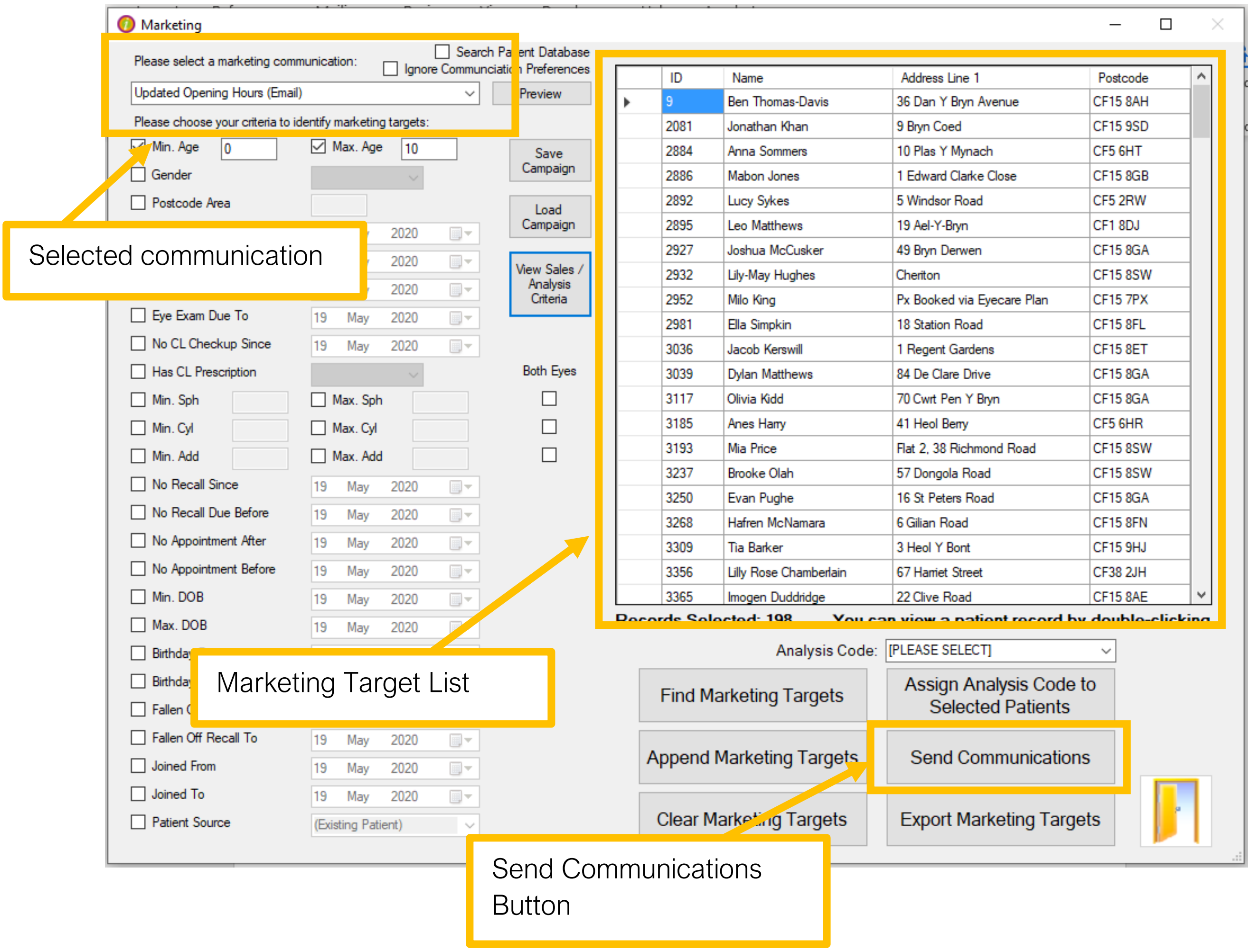
If you are trying to create a target marketing list of patients who have one analysis code OR another analysis code, you will need to use the append marketing targets button.

This is because if more than one analysis code is selected at the same time when you click find marketing targets, only the patients who have all these codes assigned to their record will be listed as marketing targets.

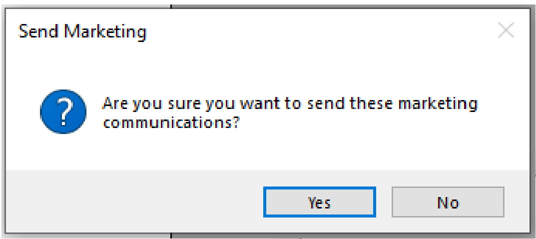
To create a list of marketing targets that have at least one of the required codes assigned to their record, select one analysis code only, then click find marketing targets.
Then untick your original selection and tick the other analysis code you would like to search, now click append marketing targets to add the patients from this search to the marketing target list. You can repeat this process as required.

Sending Marketing communications

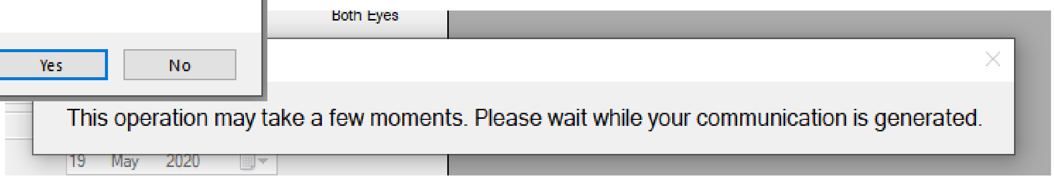
To send the selected communication to the patients in the marketing target list, click the send communications button.



After clicking the ‘send communications’ button the following pop up will appear.



After clicking yes, please wait while i-Clarity sends the communications or creates the marketing letters.

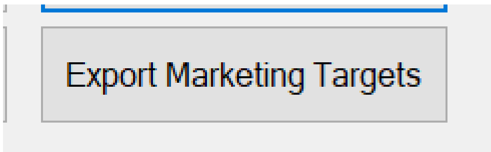


Once complete you will be shown a message to advise the process has been completed.

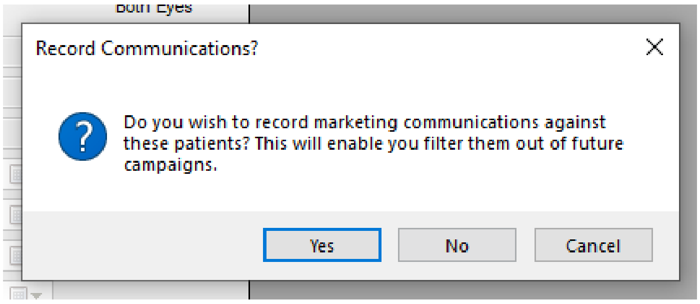
Exporting Marketing Targets

The other option to sending communications directly though i-Clarity is to export the marketing information into a spreadsheet and use this information outside of i-Clarity to send the communications.

Once you have generated your list of marketing targets click the ‘Export Marketing Targets’ button.



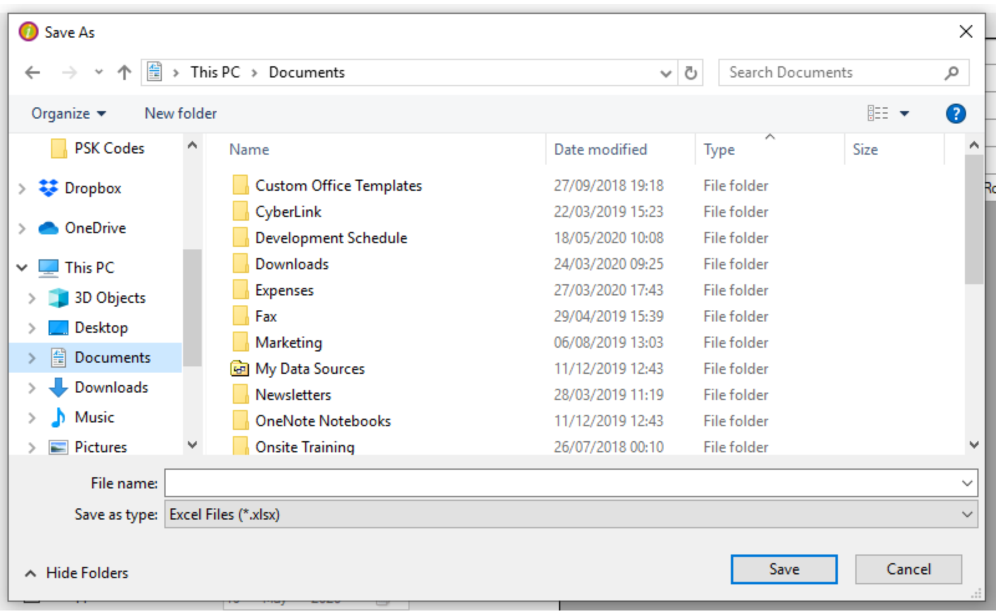
Once you have clicked the ‘Export Marketing Targets’ button you will be presented with the following message.



When you send a marketing communication through i-Clarity it gets recorded on the communications tab of the patient record so that you can use the ‘No Marketing Since’ feature effectively. If you are exporting the list there is no communication to record, therefore i-Clarity gives you the option to record the export so you can still effectively use the No Marketing Since criterion.

Clicking Yes or No to this message will move you on to the next step.

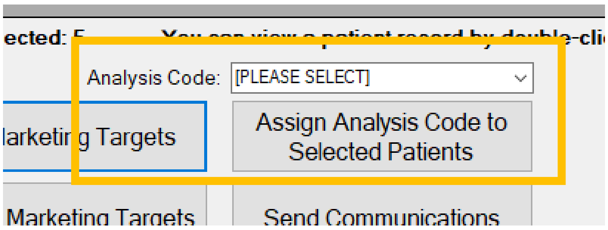
A windows explorer window will open allowing you to choose a location to save the excel document and create an appropriate name for your file.



Once the excel file has been created it will automatically open for you to view.

Marketing and Analysis Codes

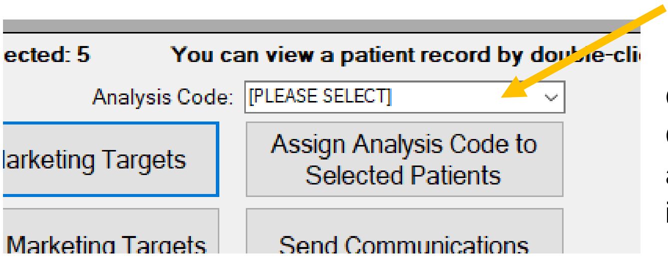
There is a feature within the marketing module that allows you to assign an analysis code to the patients listed as marketing targets.



Firstly, make sure the analysis code you want to assign to the patients is on the system.

If it is not, then an analysis code can be added to the system in the maintenance module in the analysis code tab.

Once you have created the list of marketing targets using the search criteria in marketing, select the analysis code you would like to add to their record from the Analysis code drop down.



Once selected click the 'Assign Analysis Code to Selected Patient' button, this will assign the analysis code to all the patients in the marketing target list.

<u>Examples/Ideas.</u>

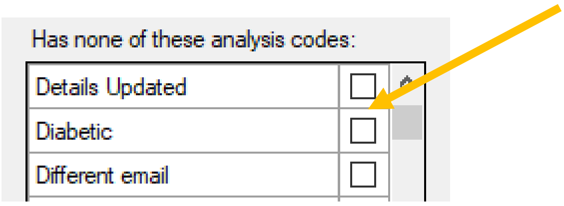
- You could use this feature to categorise your patients into different spectacle spend groups and then apply an analysis code to their record e.g. Gold Patient, Silver, Bronze. This analysis code would then be on the front of the patient record to alert i-Clarity users of the spend level of this patient.

- If you are sending a lot of communications through the marketing module and you want to prevent some communications being sent to patients who have had similar marketing but not prevent all patients from receiving two or more marketing communications, the criteria 'No Marketing Since' maybe too generic.

  You can create an analysis code for each of the marketing communications you are sending in maintenance. Before sending your marketing communication you can apply this related analysis code to all the patients in the marketing target list.

  This means that if required you can prevent patients who have received a specific type of marketing communication from appearing in the marketing target list of another campaign.

  To prevent these patients appearing in the marketing target list, tick the box next to the analysis code in the box titled 'Has none of these analysis codes'.



- The 'Has none of these analysis codes' feature is also useful to prevent sending a duplicate communication to a patient. For example you may have a communication that you want to send to a large list of marketing targets but you want to do it in smaller groups over a period of time rather than all in one go.

  Apply an analysis type to all patients listed in the smaller group before sending.

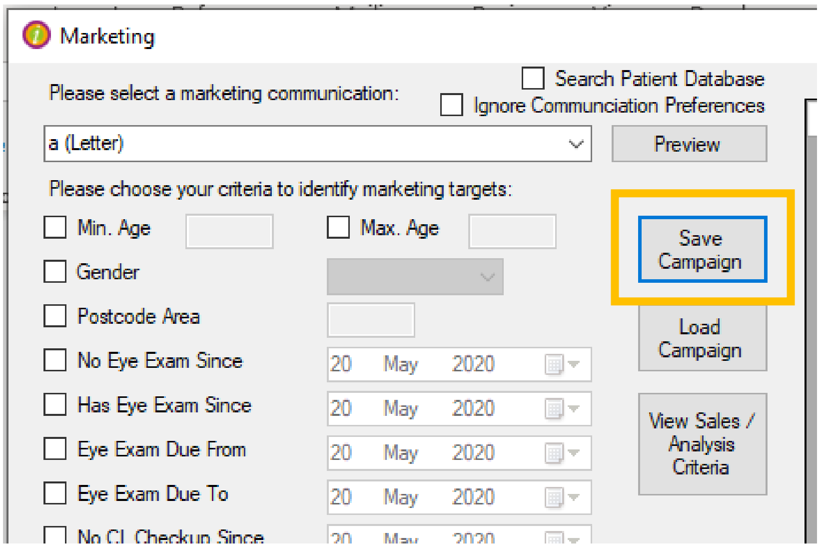
  When sending the next small group select the applied analysis type from the 'Has none of these analysis codes' before clicking find marketing targets to ensure you do not send a duplicate to a patient. Then before sending apply the analysis type to the next group of patients.

Campaigns

A campaign is thought of as a selection of criteria. If you feel there is a certain selection of criteria that would be useful to use again in the future or on a regular basis then you can save a campaign. This eliminates the need for manual selection of criteria again in the future.

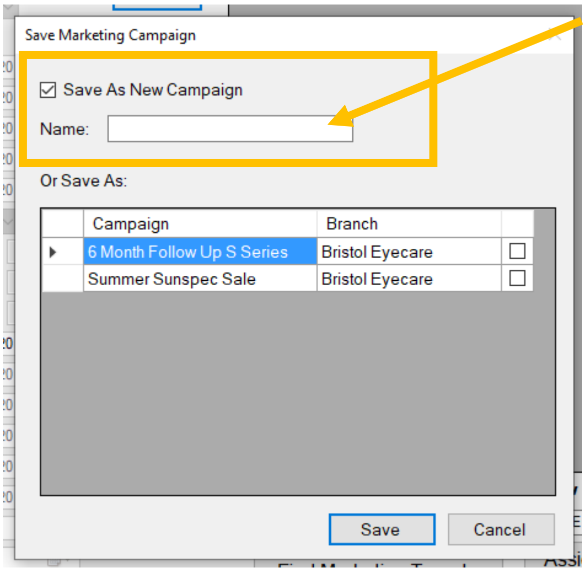
Saving a Campaign

Once you have selected all the required criteria, click on the 'Save Campaign' button.



This opens a new save window.

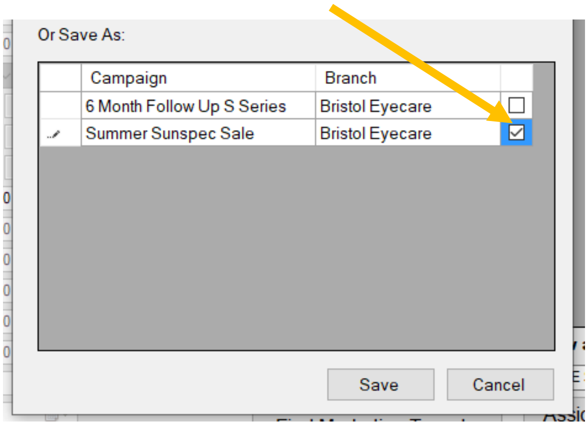
By default, the system is configured for you to save the selected criteria as a new campaign.



Type the name of your campaign in the 'Save as' field.

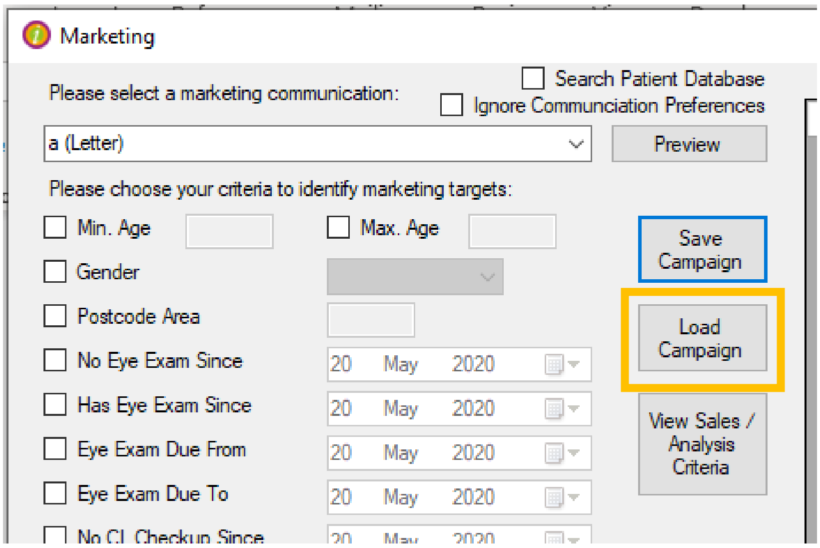
Then click on the 'Save' button.

If you would like to update the criteria against an already saved campaign, tick the box next to the existing campaign and then click 'save'.

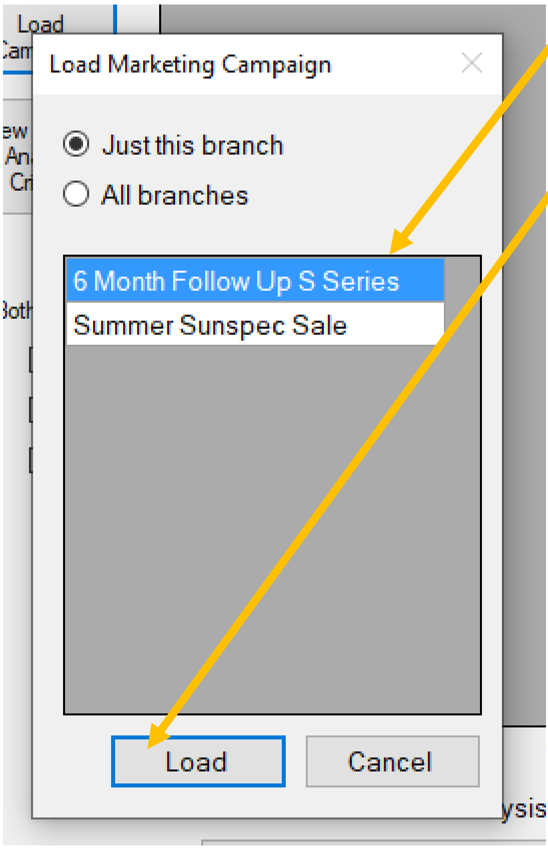


Loading a saved Campaign

To load a saved campaign, click on the 'Load Campaign' button.



A load marketing campaign window will open.

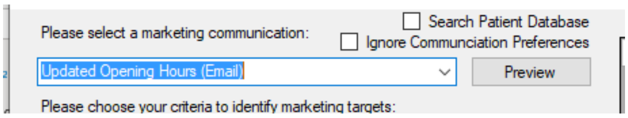


Click to highlight the campaign you would like to load.

Then click 'Load'

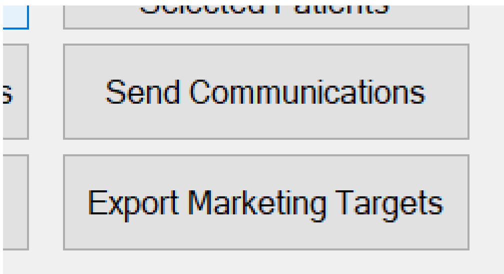
This will automatically close the window and select the relevant criteria on the main marketing form.

You can now continue with the process of creating a marketing target list by selecting a communication.



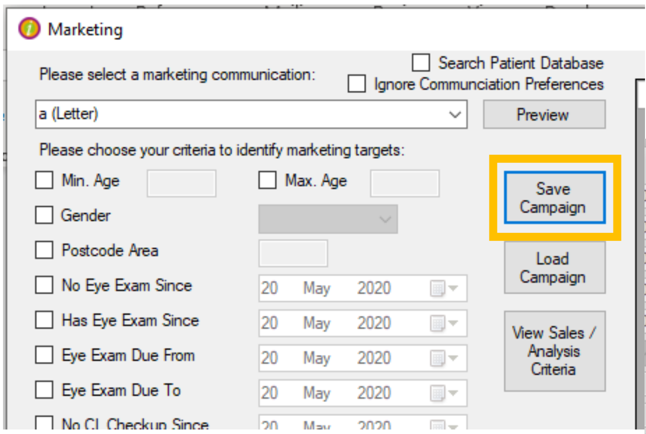
Clicking 'Find Marketing Targets'.

Then Sending or Exporting communications.

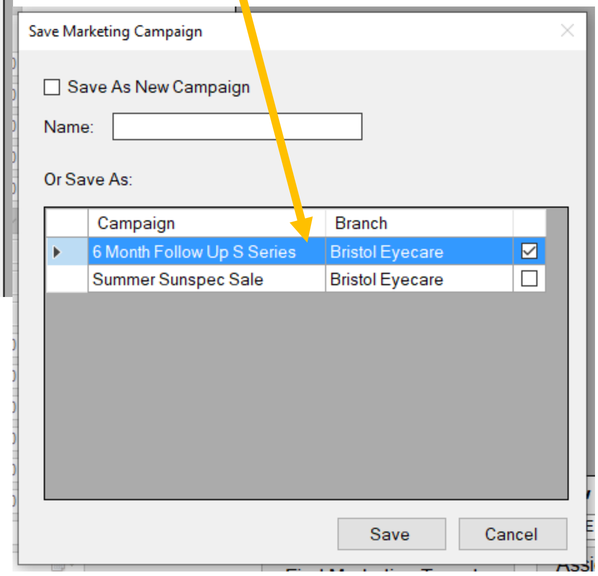


Deleting a saved campaign

To delete a now obsolete saved campaign, click on the save campaign button.



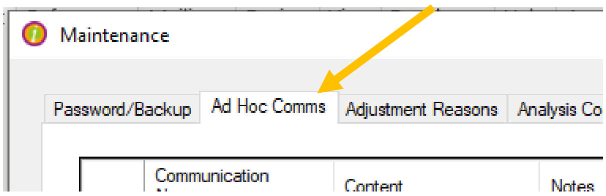
In the new window that opens, click to highlight the campaign you would like to delete.



Then click the delete button on your keyboard.

Creating a marketing communication

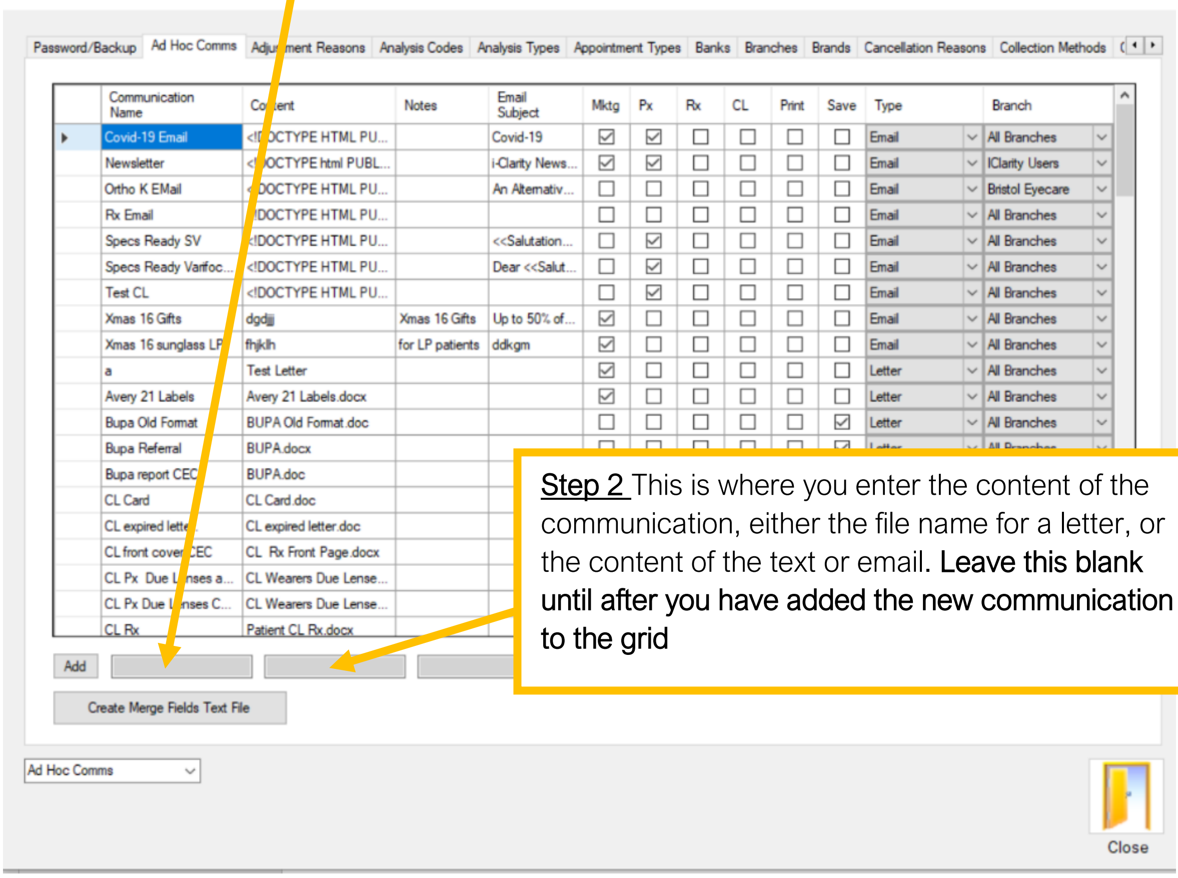
Marketing communications are set up in the ‘Ad Hoc Comms’ tab of the maintenance module.



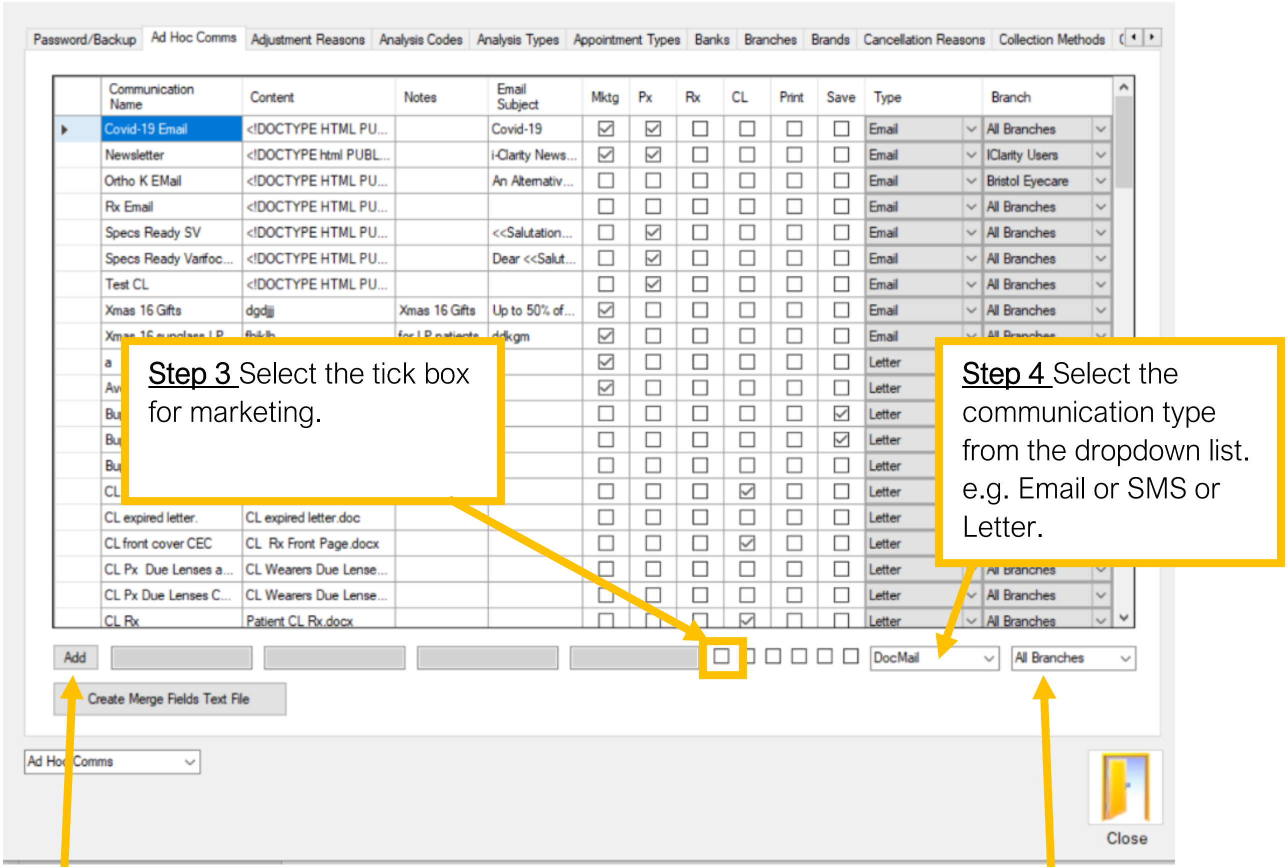
Adding a new communication

A new communication is added to the ‘Ad Hoc Comms’ tab by completing the bottom line.

Step 1 Type the communication name e.g. Summer Marketing



Step 2 This is where you enter the content of the communication, either the file name for a letter, or the content of the text or email. Leave this blank until after you have added the new communication to the grid



Step 3 Select the tick box for marketing.

Step 4 Select the communication type from the dropdown list. e.g. Email or SMS or Letter.

Step 6 Click add.

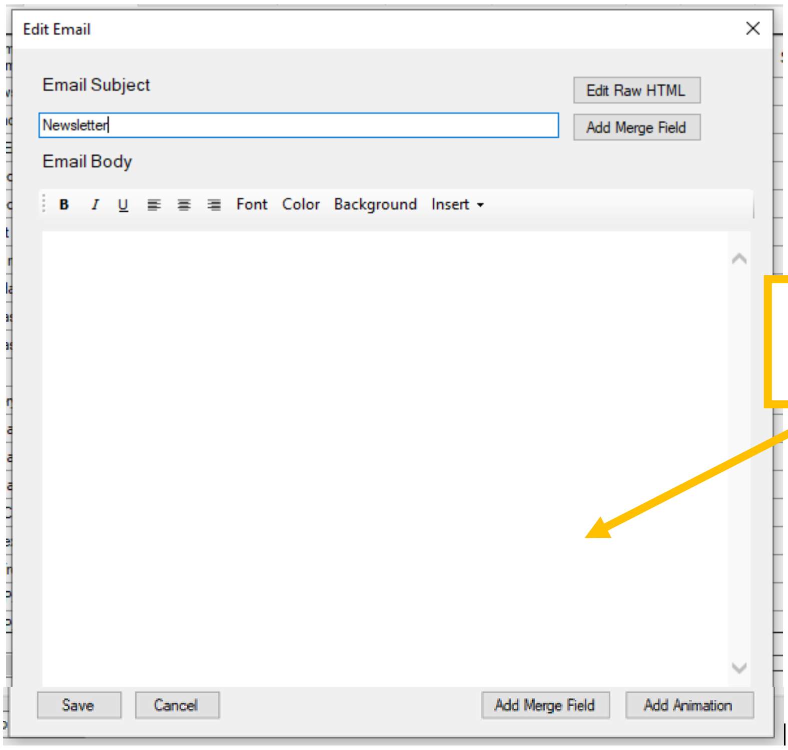
Step 5 If the communication is specific to one branch you can select that branch from the dropdown list.

After clicking add, the communication will be added to the grid above.

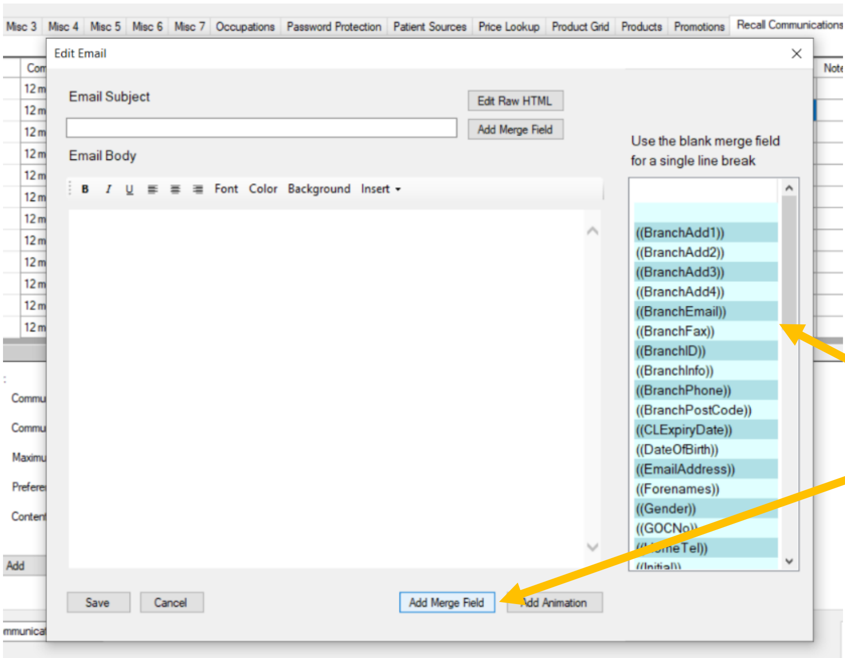
To add the content to your communication, double click on the content box.

Because you have already added the communication with a communication type, double clicking on the content box will open the applicable window for the content you are adding.

Adding Email Content



Type your email content in this main section.



You can insert merge fields into the main body of the email by clicking the "Add Merge Field" button.

A list of available merge fields will appear.

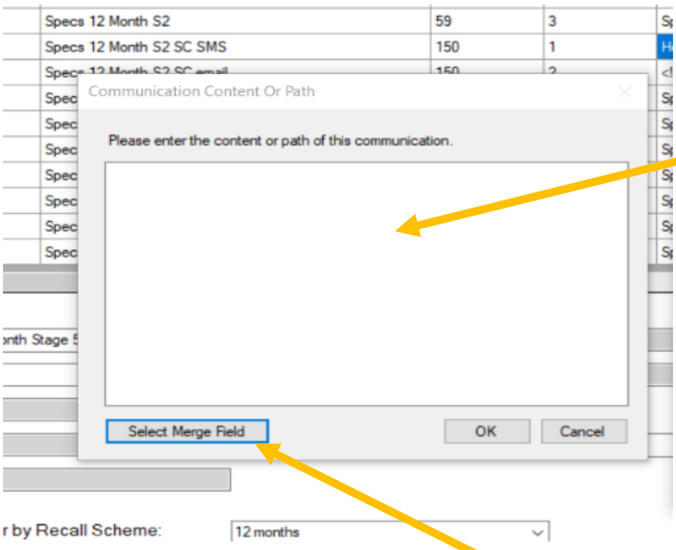
Drag and drop the required merge fields into the email content.

Once complete, click the save button.

The email subject can be typed into this field on the grid.

	Communication Name	Content	Notes	Email Subject	Mktg
	Newsletter				☑

Adding SMS Content



Type your text message content in this main section.

You can insert merge fields into the main body of the text by clicking the "Select Merge Field" button.

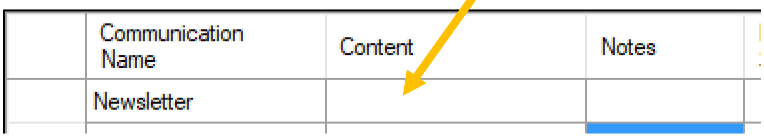
A list of available merge fields will appear.

Double click on the merge field to enter it into the text message content.

Once complete click the 'OK' Button.

Adding a Letter

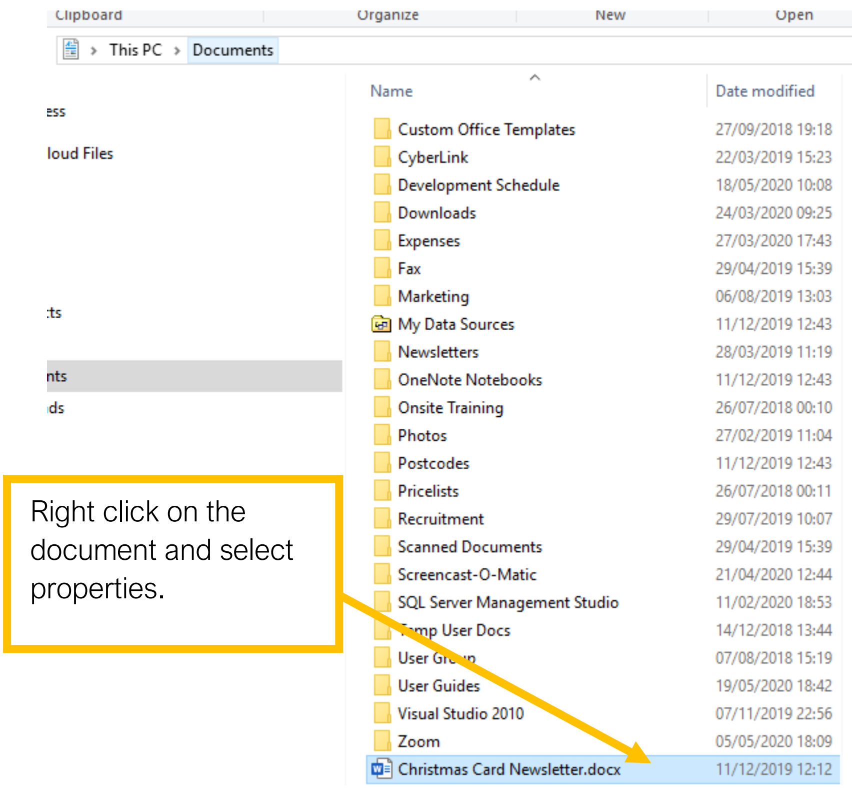
If your communication type is a letter, type the file name of the document, including the file extension, directly into the contents box.

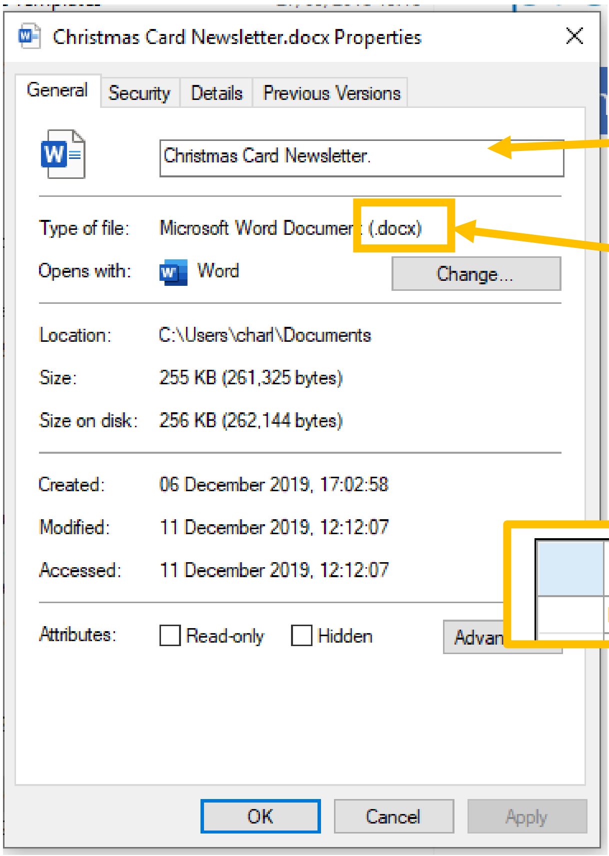


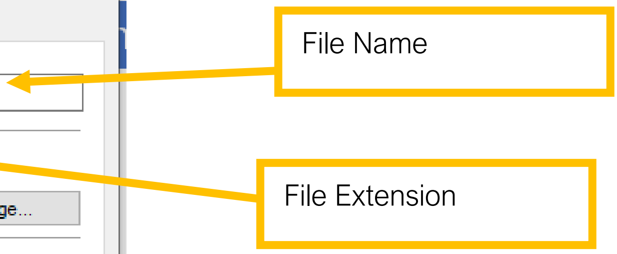
(If you have not already set up and saved your document please see "word document set up" below)

You can find the file name by following these steps:

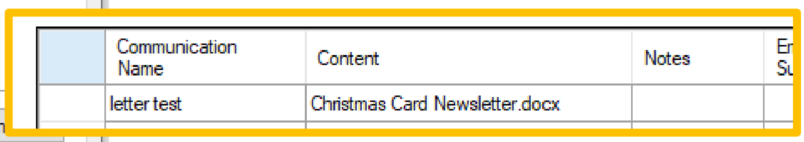
Firstly, Open the file location but do not open the document.







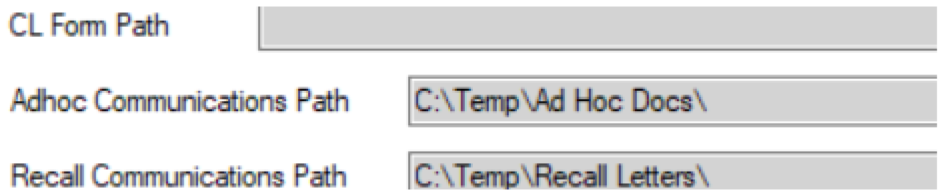
Type the file name followed by the file extension into the content field of the Ad Hoc Comms tab in maintenance.



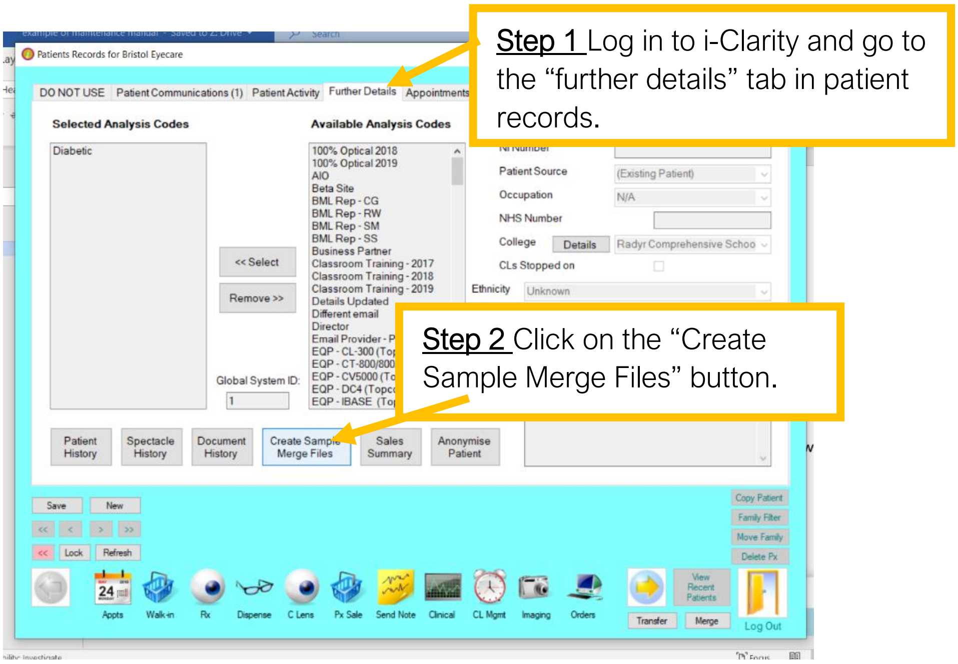
	Communication Name	Content	Notes	En Su
	letter test	Christmas Card Newsletter.docx		

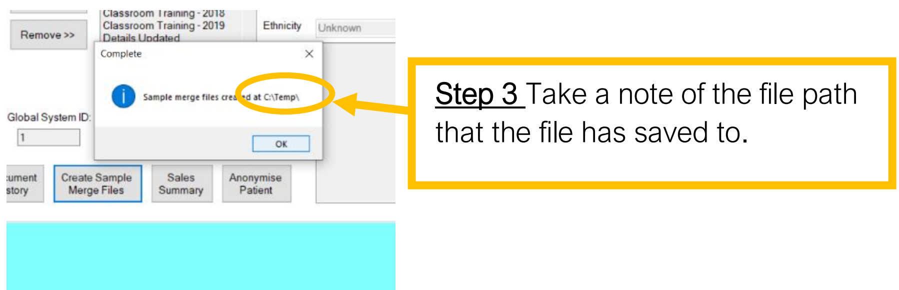
Word document set up

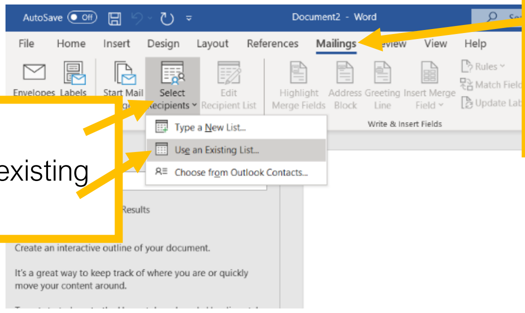
Save your word document in your ad hoc folder. You can find out where this is by going to your branches tab in maintenance:



When you have your content for each of your patient letters saved you need to input "placeholders" in order that the patient's details will be mail merged into the document. You need to export a sample mail merge file from i-Clarity to use in your document.

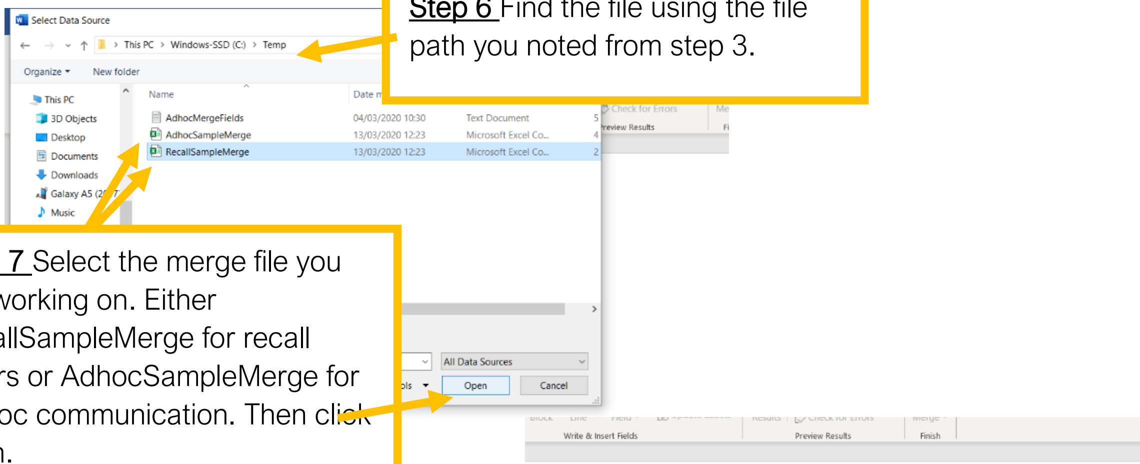






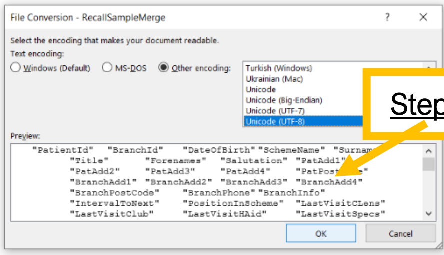
Step 4 Go to your word document that contains your letter, click on “mailings”.

Step 5 Click “select recipients” then “use existing list”.

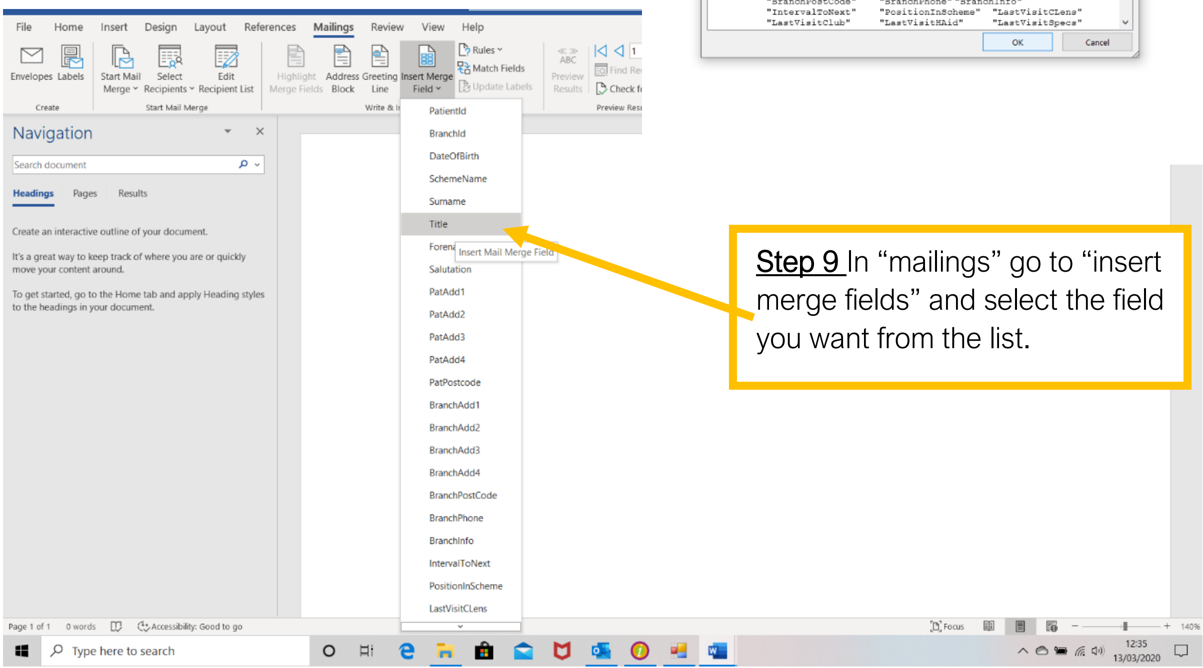


Step 6 Find the file using the file path you noted from step 3.

Step 7 Select the merge file you are working on. Either RecallSampleMerge for recall letters or AdhocSampleMerge for ad hoc communication. Then click open.



Step 8 Click OK.



Step 9 In “mailings” go to “insert merge fields” and select the field you want from the list.

You can now save changes to your document.