

fintech

OS

Omnichannel Campaigns 20.2.10x0

User Guide

TOC

Overview	4
Omnichannel Campaigns Features	4
Applications	5
Installation	6
Step 1. Download the Campaign Management deployment package (FintechOS Studio versions prior to v20.1)	6
Step 2. Import the Campaign Management deployment package into FintechOS Studio (FintechOS Studio versions prior to v20.1)	7
Omnichannel Campaigns Management	8
Managing Campaign Types	8
Add campaign types and subtypes	8
Edit campaign types	9
Delete campaign types	10
Managing Seasonal Campaigns	10
Add seasons	10
Edit seasons	12
Delete seasons	12
Managing Marketing Team Members	12
Add marketing team members	12
Edit marketing team member details	14
Delete marketing team member	14
Creating Campaigns	14
1 Set up a campaign	14
2 Define the campaign content	16

- Marketing Antispam Settings17
 - 3 Define the campaign audience18
 - 4 Schedule the campaign18
- Campaign Stages19
 - Define A/B Variations23
 - Exclude Segment23
- Preview campaign stage instances24
 - 5 Control campaign activities27
 - 6 Control campaign27
 - 7 Save campaign27

Overview

The evolved customers bounce between channels (mobile devices, laptops, etc) throughout the buying journey, so marketers need to ensure that no matter which channel the customers use, the message will be seamless- customers will receive the same experience and messaging through each and every channel.

Omnichannel campaigns has the customer at the core to ensure a unified experience at every touch point in the buying journey, fostering an effortless buying experience for customers.

The Omnichannel Campaigns automation processor empowers you with the ability to create effective and user-tailored ways of interacting with the customer. Using this automation processor, you can automate completely personalized campaigns, populate unique emails for each individual, ensuring a personalized communication with your customers based on their needs,

This is done in a cost-effective manner, and through the modular design of the FintechOS platform ensures both encapsulation and integration. You can easily change how interaction with a certain audience is done via campaigns, seasons and marketing tools.

Omnichannel Campaigns Features

- Uniquely identify the members of imported audience lists
- Anti-spam functionality, with options to skip or delay message on bank days or after previous communication
- Staged campaign execution, with distribution variations on channel, content template and A/B Control Group
- Redirecting messaging to campaign controlling group
- Advanced recurrence settings per stage

- Previewing scheduled activities and exceptions (exceeded length, no data available for token, etc.)
- Approval workflow to manage campaign authoring
- Previewing and exporting execution plan and campaign activities, logs and A/B variation counters for each run




Applications

- Loan applications
- Quote applications
- Mortgage processing.



Installation

Starting with v20.1, the FintechOS Studio comes with the Omnichannel Campaigns processor pre-installed. For older versions of FintechOS Studio, follow all the installation instructions below:

Step 1. Download the Campaign Management deployment package (FintechOS Studio versions prior to v20.1)

1. In the [FintechOS App Store](#), select the **Digital Apps** category.
2. From the list of automation processors, select **Campaign Management**.
3. In the Campaign Management page, click the shopping cart icon () to add the app to your shopping cart.
4. In the top menu, select **My Cart**.
5. Click the **Checkout** button ()
6. Fill in the required information and click the **Place Order** button () to download the deployment package.

Step 2. Import the Campaign Management deployment package into FintechOS Studio (FintechOS Studio versions prior to v20.1)

1. Launch FintechOS Studio in developer mode.
2. Click the main menu icon () at the top left corner.
3. In the main menu, click **DEVOPS**.
4. Click **Deployment Packages**.
5. Click the **Import** icon () in the top right corner to import the deployment package.
6. In the File Upload window that opens, navigate to the deployment package files.
7. Select the *Campaign Management.xml* file and click **Open**.

Omnichannel Campaigns Management

Campaigns typically aim to reach consumers in a variety of ways to promote a specific purpose such as reminder for a bank transfer, policy termination and various client notifications about product releases as well.



This topic covers the following topics:

Managing Campaign Types

Campaign types are a quick and convenient way of categorizing campaign data. E.g. campaigns for fall/winter season, Easter campaign, etc. Each campaign can be assigned a certain type (campaigns for fall/winter season, easter campaign, etc.) and subtype (mail, SMS campaign, etc.). Campaign types might contain multiple campaign subtypes.

Add campaign types and subtypes

To add a campaign type, follow these steps:

1. Click the main menu icon () at the top left corner.
2. In the main menu, click **Business Automation > Omnichannel Campaigns > Campaign Types**. The Campaign Types List page appears.
3. Click the **Insert** button () at the top right corner of the page. The **Add Campaign Type** page appears.
4. Type the **Name** of the campaign type (e.g. WinterSeason).

5. If you want to add subtypes to the campaign type, click the **Save and reload** button at the top right corner of the page. The Edit Campaign Type page appears. To add a **subtype**:

1. In the Campaign Subtypes section, click the **Insert** button (



). The Add Campaign Subtype page appears.

2. Type a **Name** for the campaign subtype (e.g. Mail, Mobile).
3. If you want to differentiate and decide between the importance of different campaign subtypes, select the campaign subtype **Priority** (high, medium, low or very low).


4. Click the **Save and Close** button at the top right corner to save the campaign subtype.

Follow this procedure to add as many campaign subtypes as you need.

6. Click the **Save and Close** button () at the top right corner to save the campaign type.

Edit campaign types

To edit a campaign type, in the Campaign Types List page, double-click the record that you want to edit. The Edit Campaign Type page appears.

You can edit the name, description and also add, edit or delete campaign subtypes (if any), then click the **Save and Close** button () at the top right corner to save the changes.

Delete campaign types

To delete a campaign type, in the Campaign Types List page, select the desired record and click the **Delete** button at the top right corner of the page. A confirmation dialog appears. Click **Yes** to delete the selected record.

Managing Seasonal Campaigns

Seasonal campaigns enables you to create product bundling campaigns that resonate with the sentiments your customers have around that time of the year.


The seasonal campaigns provides you with the following key advantages:

- Increase brand awareness among customers
- Enhance chances to convert one-time customers into loyal customers
- Boost profit in an otherwise quiet period.

FintechOS enables you to go a step further, split your seasonal campaign into various instances. This is particularly useful if you want to offer different levels of promotional discounts at different times during the seasonal campaign (e.g. offer higher discounts the last 2 days prior the winter campaign ends).

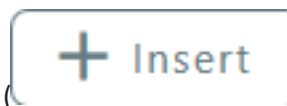
Add seasons

To add a season, follow these steps:

1. Click the main menu icon () at the top left corner.
2. In the main menu, click **Business Automation > Omnichannel Campaigns > Seasons**.
The **Seasons List** page appears.

3. Click the **Insert** button (+) at the top right corner of the page. The **Add Season** page appears.
4. Type the **Name** of the campaign type (e.g. Winter).
5. Type in the **Description** for the season.

6. If you want to split your seasonal campaign into instances, click the **Save and reload** button at the top right corner of the page. The **Edit Season** page appears. To add an instance:




1. In the Instances section, click the **Insert** button (+). The **Add Season Instance** page appears.
2. Type a **Year** and **Name** . Select the season instance **Start Date** and **End Date**.
3. Click the **Save and Close** button (📁) at the top right corner to save the campaign subtype. The **Name** of the instance is automatically set as the concatenation of the season name and the instance year.

Follow this procedure to add as many season instances as you need.

7. Click the **Save and Close** button at the top right corner to save the season settings.

Edit seasons

To edit a season, in the Seasons List page, double-click the record that you want to edit. The Edit Season page appears.

You can edit the name, description and also add, edit or delete season instances (if any), then click the **Save and Close** button () at the top right corner to save the changes.

Delete seasons



To delete a campaign type, in the Seasons List page, select the desired record and click the **Delete** button at the top right corner of the page. A confirmation dialog appears. Click **Yes** to delete the selected record.

Managing Marketing Team Members

Storing information about the marketing team members is very easy. This feature is used to record the person responsible for sending specific messages and keeps a log of the number of messages sent. In addition to that, personal information like name, email and phone are also stored along with an associated user to allow an easy way of contacting that person and to promote ownership.

Add marketing team members

To create your marketing team responsible with the customer communication and omnichannel campaigns, follow these steps:

1. Click the main menu icon () at the top left corner.
2. In the main menu, click **Business Automation > Omnichannel Campaigns > Marketing Team Members**. The **Marketing Team Members List** page appears.
3. Click the **Insert** button () at the top right corner of the page. The **Add Marketing Team Member** page appears.

ADD MARKETING TEAM MEMBER

MARKETING TEAM MEMBER

Account: Mihai Ion Attached User: host

First Name: Mihai Last Name: Ion

Email: mihai.ion@gmail.uk Phone: 1234567

Team Member Function: Account Manager

4. Set the following fields:

Field	Description
Account	An account that already exists in the database.
Attached User	The user attached to the account.
First Name	The first name associated with the account.
Last Name	The last name associated with the account.
Email	The email associated with account.
Phone	The phone number associated with the account.
Team Member Function	Select a function for that team member: <ul style="list-style-type: none"> • none • manager • account manager.

5. Click the **Save and Close** button (📁) at the top right corner to save the team member.

Repeat the procedure above to add as many members as you need for your marketing team.

Edit marketing team member details

To edit a marketing team member's details, in the Marketing Team Members List page, double-click the record that you want to edit. The **Edit Marketing Team Member** page appears.

Make the desired changes and click the **Save and Close** button () at the top right corner to save the changes.

Delete marketing team member



To delete a marketing team member from the list, in the Marketing Team Members List page, select the desired record and click the **Delete** button at the top right corner of the page. A confirmation dialog appears. Click **Yes** to delete the selected record.

Creating Campaigns



IMPORTANT! Prior to creating campaigns, you need to create personalized content and define audiences using the Hyper-Personalization Automation processor; otherwise, you won't be able to create campaigns. For information on how to create personalized and audiences, see the *Hyper-Personalization Automation Guide*.

1 Set up a campaign

1. Click the main menu icon () at the top left corner.
2. In the main menu, click **Business Automation > Omnichannel Campaigns > Campaigns**.
The Campaigns List page appears.
3. Click the **Insert** button () at the top right corner of the page. The campaign configuration page appears by default on the **Setup** tab.

4. Set the following fields:

Field	Description
Name	The name of the campaign which will uniquely identify it. This field is mandatory.
Start Date	The date when the campaign starts. This field is mandatory.
End Date	The date when the campaign ends. This field is mandatory.
Campaign Type	The campaign type.
Campaign Subtype	The campaign subtype.
Campaign Priority	The campaign's priority. This field is mandatory.
Campaign Identifier	Specific to each customer, this is a unique identifier of the campaign.
Total Number of days	Insert the number of days that the campaign will be taking place.
No days since start	The number of days since the campaign has started.
remaining days	The number of remaining days, the campaign has until it ends.
Description	The purpose of the campaign, how it works, intended audience, etc.
Created by user	This field is read-only. It will display the name of the user once saved.
Created On	This field is read-only. It will display the date once saved.

ADD CAMPAIGN

Name

Start Date End Date

Campaign Type Campaign Subtype

Campaign Priority Campaign Identifier

Total Number of Days No of days since start Remaining Days

Description

Created by user Created On

5. Click the "Save and reload" button.

You can continue with the next step.

2 Define the campaign content

Click the **Content** tab. The Content section allows you to define how the audience will be contacted and with what content will be sent.

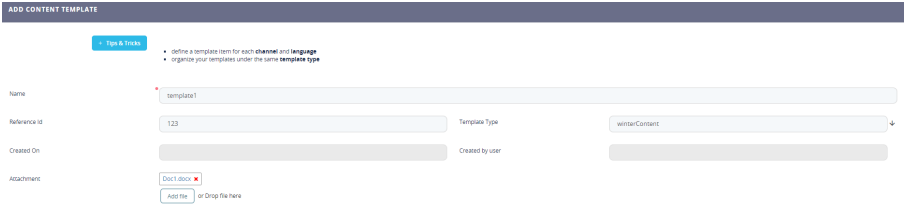
The content is selected by choosing a template. Content templates are essential to the content creation process, they provide the means to interact with customers in a meaningful manner.

Special options exist for anti-spam, namely the possibility to select delays for weekends and special holidays. These work by adding a delay for the communication if that message would happen in a weekend or a holiday.

In addition to that, there is the option to exempt the communication from anti-spam rules. This is useful for critical messages that need to reach our audience right away.

This section also allows you to select messages, as you can insert each type of communication and select an individual delay for each of these.

The table below describes the settings for defining the campaign content:

Field	Description
Template	<p>Selects the personalized content to use from the list of available templates.</p> 
Type of delay for holidays	<p>The number of days of delay to be added to the communication date should this date occur on a holiday:</p> <ul style="list-style-type: none"> • do not send • send away • send after.

Field	Description
Type of delay for weekend	<p>The number of days of delay to be added to the communication date should this date occur during a weekend:</p> <ul style="list-style-type: none"> • do not send • send away • send after.
Exclude from antispam	<p>Tick checkbox to exclude communication from the antispam rules. This is used for highly important messages that need to be sent to the customer as fast as possible.</p>
Max Delay Days No	<p>Insert the maximum days available for delay of campaign.</p>

Marketing Antispam Settings

To avoid spamming your audience or being unnecessarily disruptive to the clients, a special set of rules and conditions have been created in order to help you choose the best course of action (antispam rules).



HINT You are able to set the antispam rules after saving the campaign.

For all the different types of communication channels available in FintechOS, you can define certain triggers. These can include the number of days to delay the communication:

Field	Description
Communication Channel	<p>The communication channel that will be used to send messages to your audience (e.g., SMS, email, etc.).</p>
Source Campaign	<p>Select the campaign name.</p>
Delay Days No	<p>The number of days that communications will be delayed in order to prevent spamming the audience with the same message in a short period of time.</p>

3 Define the campaign audience

Audience is any specific person that exists in the database who has given data processing consent for marketing purposes and which fulfills any conditions that might be set. The data source for the audience is the audience type, which can be:

- imported
- static
- dynamic.

A dynamic audience list is one that changes over time while a static list is one that remains the same. An imported list behaves similar to a static list with the exception that it is a list from an outside source (e.g., a marketing partner).

To define the campaign audience, click the **Audience** tab. The content of the Audience section varies based on the **Audience Type** you select.

The Audience field filters the available audience with certain rules data in order to deliver a customizable marketing experience.

After you select the audience type and the audience, continue to next step.

4 Schedule the campaign

Click the **Schedule** tab and define the starting dates and end dates along with all the campaign stages. New campaign stages can be easily added or modified. Campaign stages have additional options that can be configured and support AB testing.

Field	Description
Start Date	Allows you to define a starting date for the campaign stages.
End Date	Allows you to define an ending date for the campaign stages.
Campaign Stages	List of the current defined campaign stages.
Days display	Displays the total number of days for which the campaign runs, the days since start and the remaining days for the campaign.

Campaign Stages

Setting up the campaign stage is done similarly to setting up a campaign. This includes fields for **Name** of the campaign stage and the **Content Template**, personalized content to be used during the campaign stage.

You can also create simple AB tests. A/B testing (bucket tests or split-run testing) is a randomized experiment with two variants, A and B.

A company with a customer database of 2,000 people decides to create an email campaign with a discount code in order to generate sales through its website. It creates two versions of the email with different call to action (the part of the copy which encourages customers to do something — in the case of a sales campaign, make a purchase) and identifying promotional code. To 1,000 people it sends the email with the call to action stating, "Offer ends this Saturday! Use code A1", and to another 1,000 people it sends the email with the call to action stating, "Offer ends soon! Use code B1".

All other elements of the emails copy and layout are identical. The company then monitors which campaign has the higher success rate by analyzing the use of the promotional codes.

The email using the code A1 has a 5% response rate (50 of the 1,000 people emailed used the code to buy a product), and the email using the code B1 has a 3% response rate (30 of the recipients used the code to buy a product).

The company therefore determines that in this instance, the first Call to Action is more effective and will use it in future sales.


A more nuanced approach would involve applying statistical testing to determine if the differences in response rates between A1 and B1 were statistically significant (that is, highly likely that the differences are real, repeatable, and not due to random chance).

There are many A/B testing case studies which show that the practice of testing is increasingly becoming popular with small and medium-sized businesses as well.

You can define send channel percentages in order to distinguish between different channels. The view to be sent can be previewed along with the starting and end times. Further differences might be set in order to differentiate between two versions of the same channel communication. For example, you can have two versions of the same email and split those to determine the results.

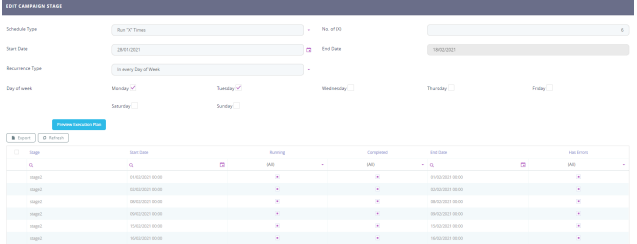
Field	Description
Allow recurrence Duplicates	Allows any recurring messages to be duplicates of previous messages.
Channel Variations list	The proportion for sending differentiated communications.
Content and Channel Variations list	The proportion for sending differentiated communications of the same type.

Moreover, the schedule is fully customizable, you can define a starting and ending date along with a recurrence type. You can also have a different schedule type that allows many different combinations to occur: daily, monthly, every X day, where X can be a number, every specific day combination of the week, and others. Previewing these settings offers a powerful way to set up an in-depth strategy of communication in order to provide your audience with the most effective possible way of receiving content updates.

Field	Description
Schedule Type	<p>The type of recurrence that the campaign stage will run on:</p> <ul style="list-style-type: none"> • one time • campaign life time • Fix dates • Run for "X" days • Run for "X" weeks • Run for "X" months • Run for "X" times.
No. of X	<p>Number of recurrences.</p> <div>  IMPORTANT! Depending on this number you insert, the period of the stage will grow. If it is too big, it may become bigger than the date period for the whole campaign, in which case it will not allow you to save the stage. </div>
Start Date	Starting date for the campaign stage.
End Date	Ending date for the campaign stage.

Field	Description
Recurrence Type	<p>Type of recurrence that will be executed by the campaign stages. Depending on the selection of these types, certain fields appear. Select from the list:</p> <ul style="list-style-type: none"> at every "X" minutes at every "X" days in every day of week week of month at day of month at season concurrence.
Activity Validity Days	<p>By default, activities generated in a stage are active for one day before they expire. If this timeframe is not sufficient, you can manually enter the number of days you wish to keep activities valid.</p>

For each type of concurrence a new field or fields open.

Type of concurrence	Fields	Description
At every X Days	No of X	How many days.
	Daily No of Days	The gap between those X, e.g. No of X 3 and Daily No of Days 5, renders three days when the campaign is sent with 5 days in between each of those three days.
At every x Minutes	No of X	How many minutes.
	No of Minutes	The gap between those minutes.
In every day of week	No of X	The number of days.
	Checkboxes with Weekdays	<p>The week days: Monday to Sunday.</p> 

Type of concurrence	Fields	Description
Week of Month	No of X	The number of weeks.
	Week No (1-5)	In which week the month the campaign will be executed.
At day of month	No of X	The number of days.
	Day No.	the actual calendar number of the day, from 1 to 31. e.g. 4 will render every day with the calendar structure 04/m/y.
At season occurrence	No of X	number of seasons.
	Season	Select one of the seasons: <ul style="list-style-type: none"> • Spring • Summer • Autumn • Winter.

Underneath, there is a button to see the Execution plan. Click to reveal the execution of the campaign.

ADD CAMPAIGN STAGE

Schedule Type

Run for "X" Months

No. of(X)

Start Date

28/01/2021

End Date

28/01/2021

Recurrence Type

In every Day of Week

Day of week

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Preview Execution Plan

Configuring the selected audience can be further changed from the **Refining Audience** tab, by excluding specific segments from the initial data set available. These are a set of conditions that will further filter the selected audience (examples include: customers under 20, customers without children, etc.).

Actions can be used (**Actions** tab) to automatically send email or SMS messages, based on user configuration, and place them in a system queue which will then deliver them to the intended audience. Activities can be used to send email or SMS messages under human supervision by inserting them in this list will execute them where it is applicable.

The **Execution Log** tab displays a list of all the actions undertaken in this category along with the associated stage and ending dates. This allows you to easily track and see what happens under the system.

Define A/B Variations

Depending on the template created and selected for the campaign, certain channels will be rendered here:

- email
- SMS.

EDIT CAMPAIGN STAGE

Allow Recurrence Duplicates ☐

CHANNEL VARIATIONS

Refresh

<input type="checkbox"/> Channel	Send Channel (%)	Start Time (hh)	Start Time (mm)	End Time (hh)	End Time (mm)
EMAIL MFA	100.00	00	00	23	59
CONTROL GROUP	0.00	00	00	00	00

CONTENT & CHANNEL VARIATIONS

Refresh

<input type="checkbox"/> Channel	Template	Send Template (%)
	No data	

Edit the:

Field	Description
Send channel %	There is the percentage used for the usage of the channel.
Start time (hh)	The starting hour.
Start time (mm)	The starting minutes.
End time (hh)	The ending hour.
End time (mm)	The ending minute.

Exclude Segment

From the audience selected it is possible to eliminate certain people depending. Click the "Insert existing" and select from the pop-list the audience which will not receive the campaign messages.



HINT

Create the list with the audience to be excluded before arriving to this step.

Preview campaign stage instances

Once you have defined and saved a campaign stage, you can generate an Excel file that lists all the data for an instance of that stage. The preview is generated asynchronously by a job scheduler and you have the option to receive an email notification when the Excel file is ready. To create a stage instance preview:








1. In FintechOS Studio, open a campaign in the editor and select the **Schedule** tab.
2. If the execution plan is not displayed, click the **Preview Execution Plan** button to generate it.
3. Double click a stage instance from the execution plan to open it.
4. In the stage instance form, select the **Activities Preview List** tab.
5. Click **Insert** to create a new stage instance preview.
6. In the Add Generated Preview window, enter a **Begin Date** for when you wish to schedule the processing for the preview and select the **Send Mail** checkbox if you wish to send an email notification when the preview is ready.

7. Click **Save and Reload** at the top right corner of the page.
8. In the Edit Generated Preview page, you can modify the **Begin Date** and **Send Mail** options and customize the **Email Address** where you wish to receive the notification

once the preview is ready.

EDIT GENERATED PREVIEW

GENERATED PREVIEW

Name	activity_Test2_stg2_02-26-2021_12-10:15
Status	Scheduled 
Preview Type	Activity 
Begin Date	26/02/2021 12:15 
End Date	
Found Records	
Send mail	<input checked="" type="checkbox"/>
Email Address	john.doe@fintechos.com
File	
Campaign	Test2  
Stage	stg2  

Cancel

- Click **Save and Close** at the top right corner of the page.

The Activities Preview List tab lists all the stage instance previews tasks that have been finished, are in progress, or are scheduled to run in the future.

GENERATED PREVIEWS

+ Insert

X Delete

■ Export

↻ Refresh

<input type="checkbox"/>	Name	Status	Begin Date	End Date	Preview Type	Found Records	Created On
	🔍	🔍	🔍	📅	🔍	🔍	📅
	activity_Test2_stg2_02...	Finished	25/02/2021 11:56	25/02/2021 11:57	Activity	10,000	25/02/2021 11:56
	activity_Test2_stg2_02...	Finished	25/02/2021 14:29	25/02/2021 14:29	Activity	10,000	25/02/2021 14:29
	activity_Test2_stg2_02...	Finished	25/02/2021 14:49	25/02/2021 14:49	Activity	10,000	25/02/2021 14:49
	activity_Test2_stg2_02...	Finished	25/02/2021 14:49	25/02/2021 14:50	Activity	10,000	25/02/2021 14:49
	activity_Test2_stg2_02...	Finished	25/02/2021 14:51	25/02/2021 14:51	Activity	10,002	25/02/2021 14:51
	activity_Test2_stg2_02...	Finished	25/02/2021 14:53	25/02/2021 14:53	Activity	10,002	25/02/2021 14:53
	activity_Test2_stg2_02...	Scheduled	26/02/2021 12:15		Activity		26/02/2021 12:15

Once a preview generation is finished, if you select it from the list, you will be able to download the Excel file containing stage instance preview data.

EDIT GENERATED PREVIEW

GENERATED PREVIEW

Name	activity_Test2_stg2_02-26-2021_12:10:15
Status	Finished
Preview Type	Activity
Begin Date	26/02/2021 12:15
End Date	26/02/2021 12:20
Found Records	10,002
Send mail	<input checked="" type="checkbox"/>
Email Address	john.doe@fintechos.com
File	FTOS_MKT_StageInstance.xlsx
Campaign	Test2
Stage	stg2

5 Control campaign activities

Click the **Activities** tab, This section allows you to control the associated campaign activities and actions that can be sent. These behave in a similar fashion to the activities and actions configured for the campaign stages only these should occur once the campaign has ended.

6 Control campaign

Team members can be added to the campaign team member list by allowing them to be entered in the **Control** tab. The Control section allows you to select the number of messages that will be sent and varying the control message by selecting the random message option. Each message number is associated to a campaign user.

Field	Description
Control Message Count	The number of messages that are sent.
Random Control Message	The type of message that will be sent.

In the CAMPAIGN TEAM MEMBERS grid, it is possible to select the member who can control the campaign.

7 Save campaign

Click the **Save and Close** button () at the top right corner to save the campaign.