Creating Lead Gen Process

Involved Parties and Due Dates

File due monthly at various times (check with vendor to see when the file is due to them – currently the vendor is Harte-Hanks as of 02/12)

Project Manger – Lara Reynolds

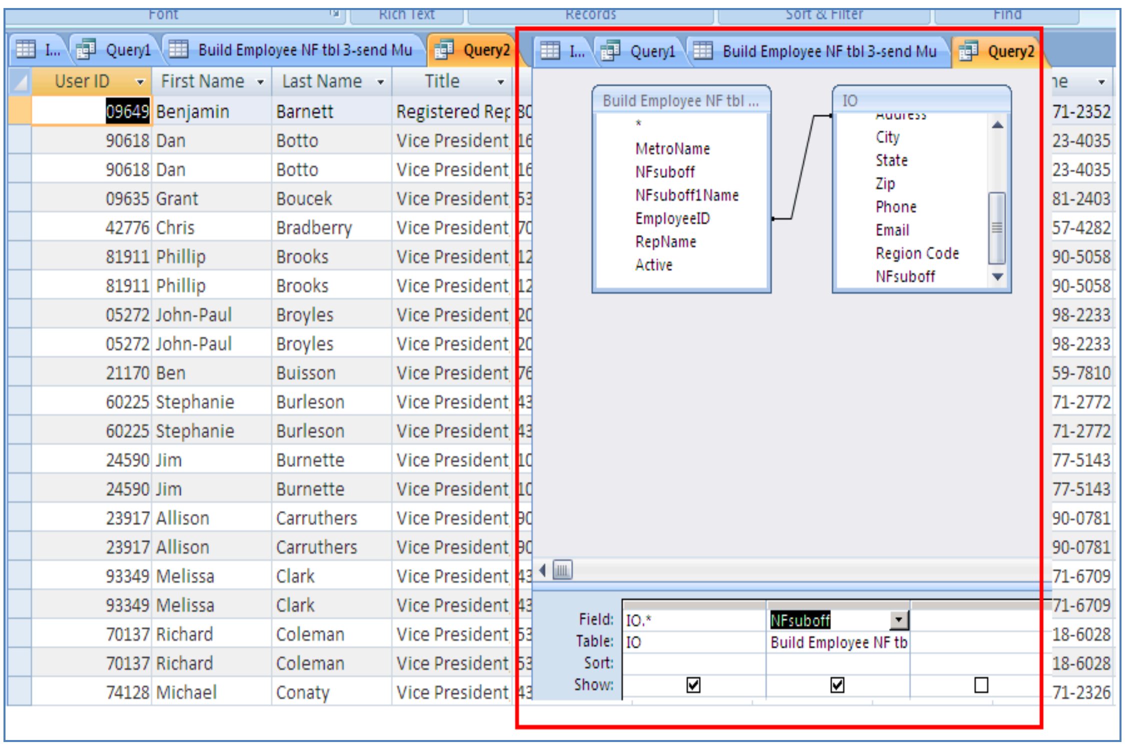
CRM Manager – Tanner Mueller

Step procedures

Download Latest IO Grid and Build Employee NF tbl 3-send.xlsx sheets from Tanner and Lara

Create new Access database the folder

Import the files into Access



Combine both tables using the Employee ID and User ID

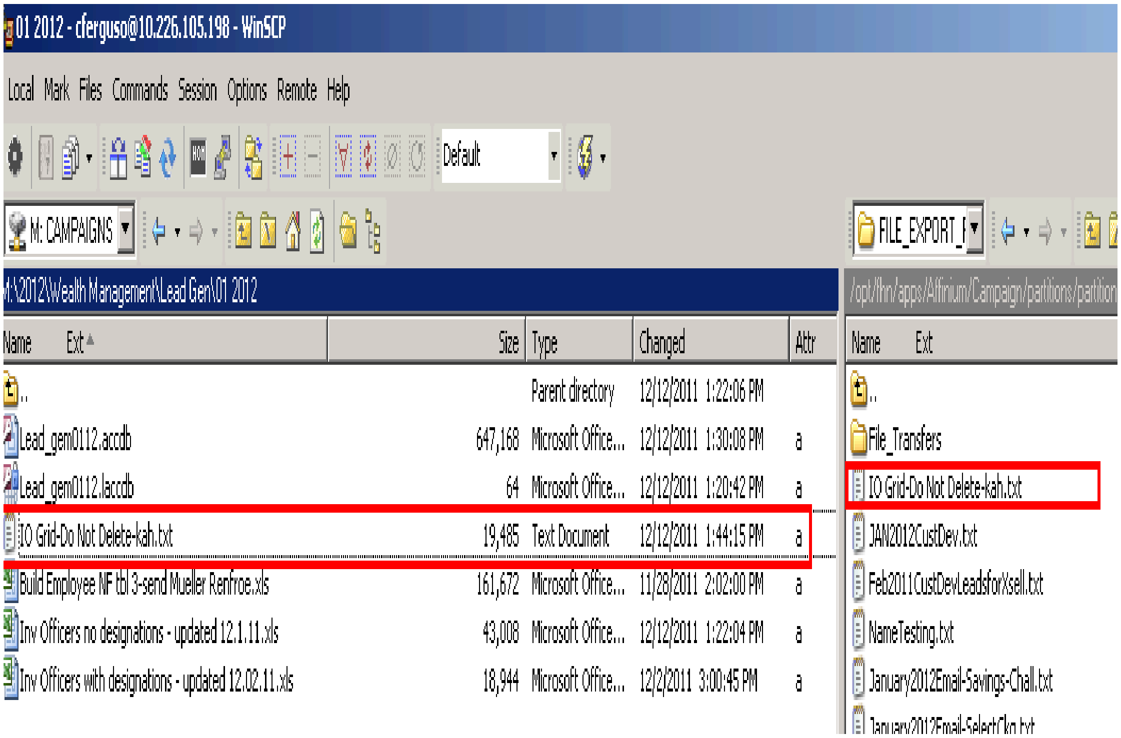
Use access to combine the 2 tables together

Note: You may have to add the leading zeros

Copy the results into Excel and erase the second to last column and rename the last column to NFsuboff

Copy the excel file into a .txt version and save it on the folder.

Name the file IO Grid-Do Not Delete-kah.txt



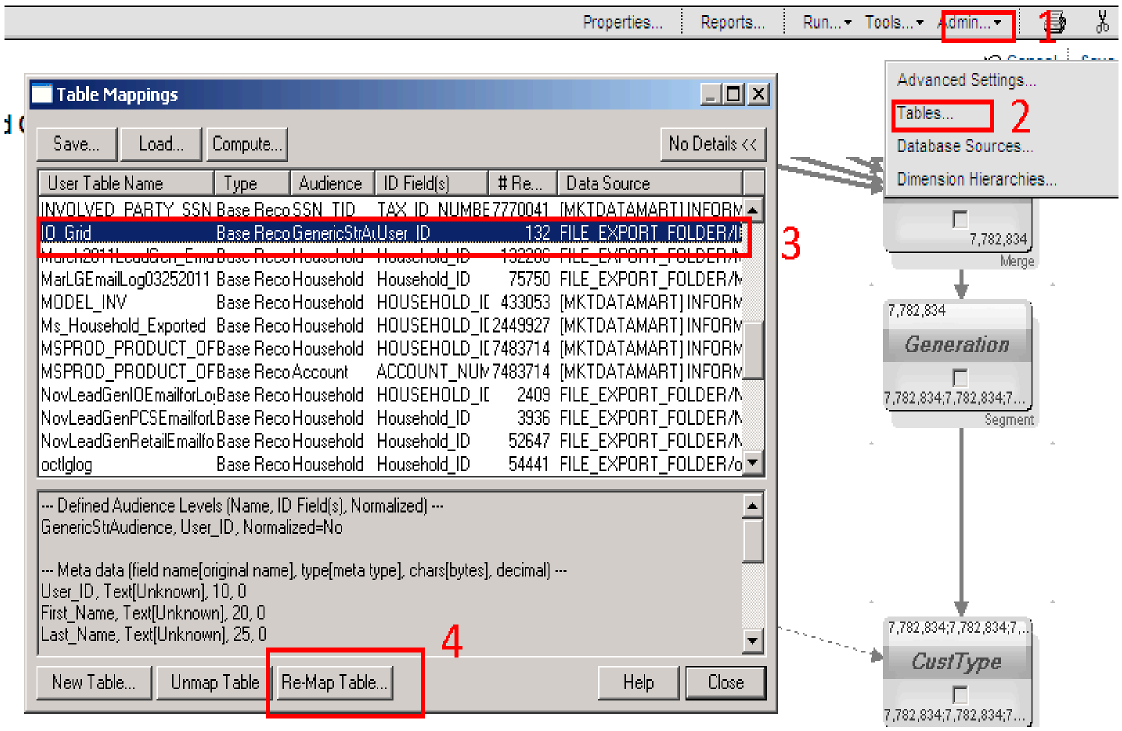
Import the file into Unica

Use the WinSCP3 to FTP the IO file into the

/opt/fhn/apps/Affinium/Campaign/partitions/partition1/FILE_EXPORT_FOLDER

In Unica

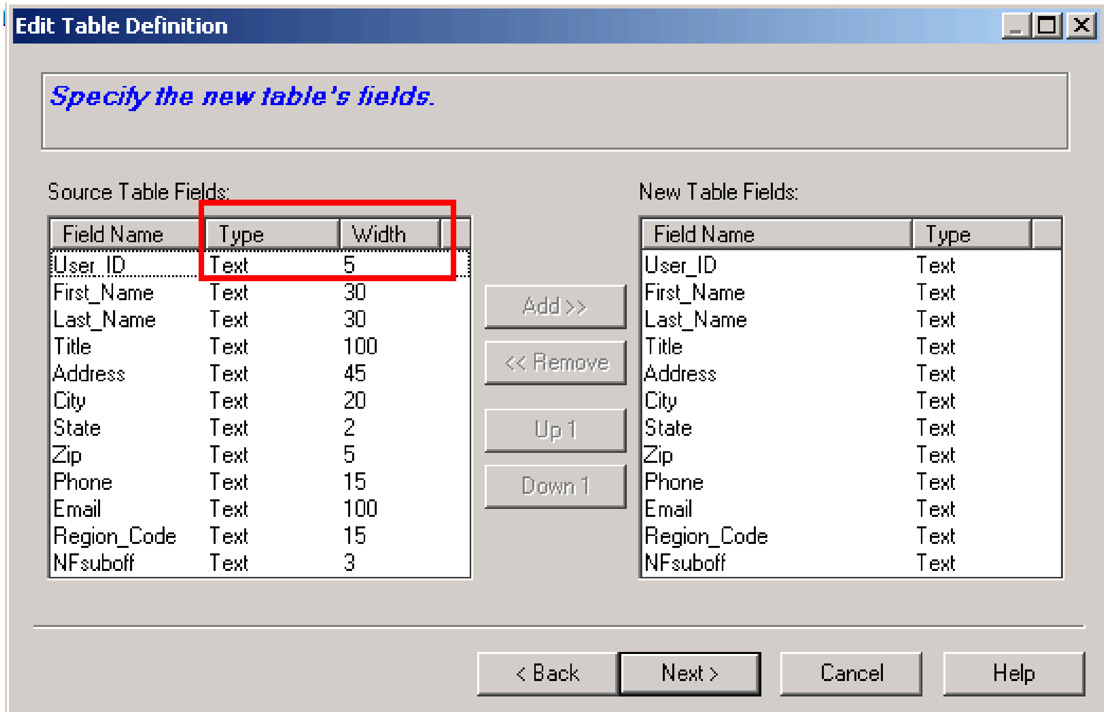
Create a new Lead Gen flowchart in Unica



Remap the IO_Grid Table

1) Select Admin
2) Select Tables
3) Find the IO_Grid
4) Re-Map table

Follow the remapping steps



Note: make sure to allocate enough space for the longest string of data and import as text – make the width about 1/3 longer than you think it should be

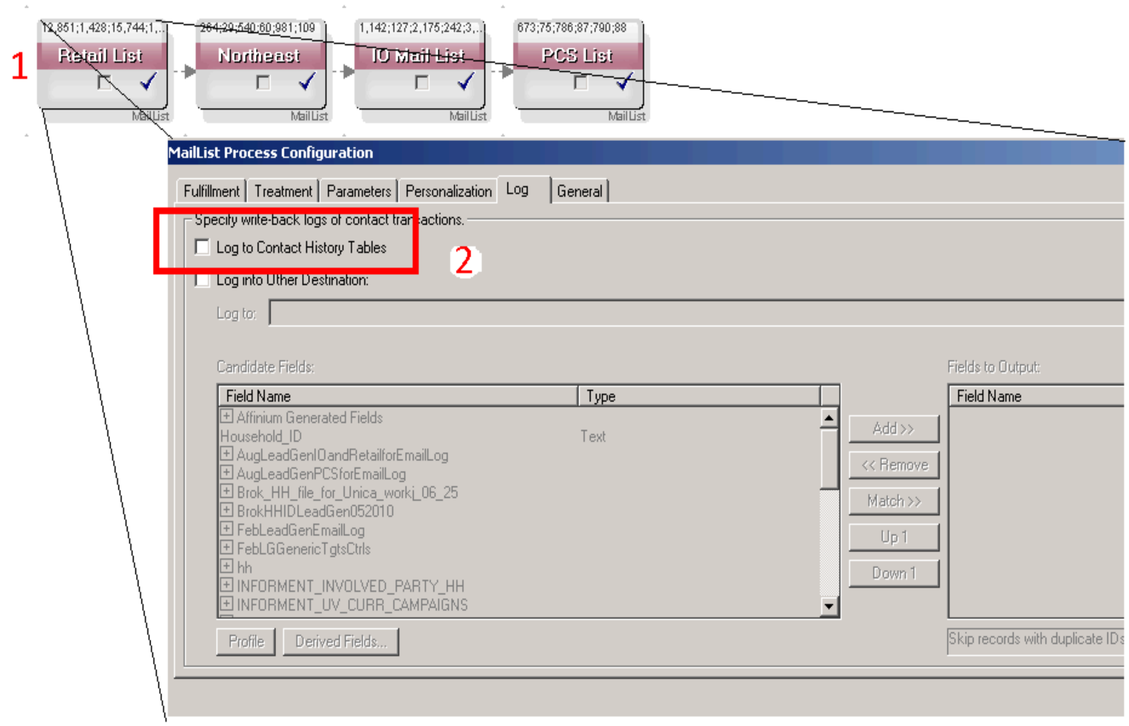
Make the table at the GenericStrAudience Audience Level – Map it to the User ID

Finish out the mapping process

Repeat the mapping process for the PCS grid

Note: the PCS table does not have to matched with any other file, but it should be converted from excel to text before loading

Run Flow Chart



Important make sure to go to the MailList (in pink usually at the bottom of the page)

1) **Click on the box and the MailList Process Configuration box will appear – chose the log tab**

2) **Make sure the Log to Contact History Tables is unchecked**

The logging process comes right before the mailing takes place

Changes to the Flowchart

Flowcharts change all the time so work with the CRM manager and the project manager consolidate changes

Currently (as of 2/2012):

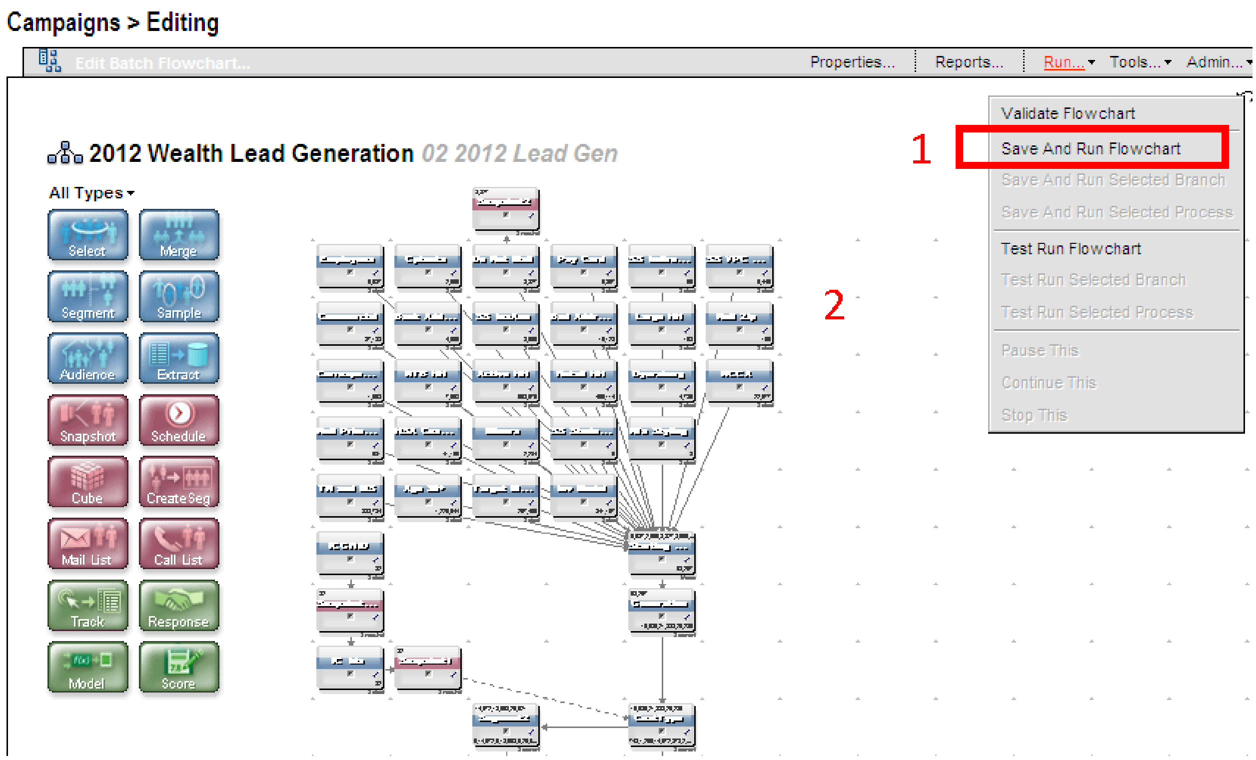
There is a change to add unsigned users to IO officers based off they most frequented Branch

A new business segment with additional mailing address for customers who also have business relationship with the bank

Starting 3/12 – 11/12 Lead Gen – there will be 2 versions per campaign

– See CRM and Project manager for detail of current changes

Starting the Flowchart



The flowchart can be

1) run all at one time

2) by individual cell

After flowchart has run

Download the files from

/opt/fhn/apps/Affinium/Campaign/partitions/partition1/FILE_EXPORT_FOLDER

Finishing steps

Some Post file manipulation is needed:

Remove blank IO and PC records that do not have a PC or IO officer assigned

Manually add IO offices to the generic reassigned segment, if needed (Current process subject to change)

Append the reassigned records to the IO Grid (Current process subject to change)

Change the naming of the fields and field order on the final excel sheets to match previous sent to vendor

Log Mail and Email Files

Use logging procedures to log the files when it is close to time to mail the offers.

Verify with Project Manger that the records appear in RMS