

1 AutoMessage



Kitomba's™ AutoMessage feature is the easy to use powerful marketing tool you've heard so much about. To use Kitomba's™ AutoMessage successfully requires you to follow a few simple steps. Firstly you must plan 4 key items:

- (i) **Who** will you send it to
- (ii) **What** will be the Message
- (iii) **When** will you send it
- (iv) **How** will you send it (email, text, post etc).

Once you have the **What, Who, When & How** in mind then you can follow the steps laid out below to use Kitomba's™ AutoMessage to create a successful campaign.

1.1 Who

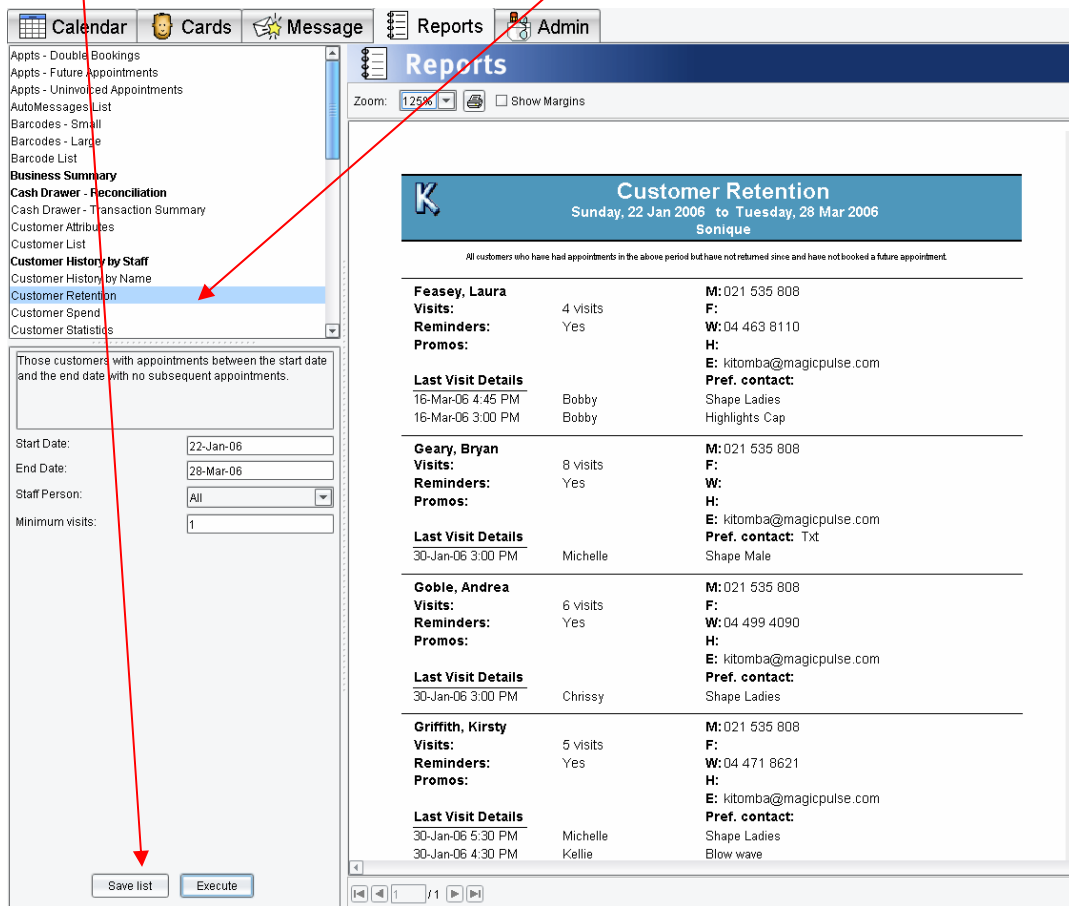
Kitomba™ provides you the option of selecting the group of customers to whom you will send your message. Kitomba™ uses a 'List' to store each separate group of customers. A List can be easily created from a Kitomba™ report. The following is a list of possible Lists (groups of customers) and the associated Kitomba™ report to generate them.

List (To Whom)	Matching Kitomba™ Report
1. All Clients	<i>default list</i>
2. New clients	<i>Customers - New Report</i>
3. Clients who have purchased a particular item(s) in a particular time period	<i>Customers who purchase a product or service Report</i>
4. Clients not seen recently who have no bookings	<i>Customer Retention Report</i>
5. Top spending clients	<i>Customer Spend Report</i>
6. Clients that match some other criteria	<i>Customer List Report</i>

At the time of creating the AutoMessage you can also further select to whom the message is sent based upon:

- Gender (All, Male, Female, not defined)
- Accepts Reminders, Accepts Promos or Accepts Reminders or Promos

To creating a List, run the appropriate Kitomba™ report (see list above), and then click the 'List' button.



To edit a List, go to the Admin Tab and select Lists to:

- Edit the List - i.e., change or update customer details, remove customers etc
- Add Clients who don't qualify according to the reports criteria, but whom you wish to receive the campaign.
- Delete the list.

1.2 What Message

Once you have decided what you want to say you need to save it in a Message Template. Message Templates are covered in section 9.5.1 of the manual.

1.3 When & How

The When & How is accomplished by creating an AutoMessage.

1. Go to the Admin Tab, Click on AutoMessage on the left hand side and then click the 'Create' button (right hand corner)
2. Then give the AutoMessage a name (for reference).
3. Enter the date **When** you want to send the message - this is referred to as the "trigger date"
4. Select the customers **Who** you want to send the AutoMessages too by selecting:
 - All, Active or Inactive Customers
 - Customers who Accept Reminders, Accept Promos, or Accept Reminders or Promos
 - Male, Female, unknown or all Genders
 - The Marketing List previously created (*section 1.1*)
5. The **What** is controlled by selecting the Message Template previously created (*section 1.2*)
6. Select the delivery time

7. The **How** is controlled by select how you want the AutoMessages to be delivered. AutoMessage will attempt to deliver all the messages via the first means you select (e.g., email). If it encounters a customer without contact details for that means (e.g., no email address) it 'hunts' down your delivery list until it gets to the bottom or finds a way of delivering your message. *Note: Pref Contact = the customer preferred contact as recorded on their card file*

Example: Your delivery list is: Email, followed by Text, followed by CallMe. AutoMessage will deliver your campaign to all customers who have email addresses, and for those that don't, it will send them text messages, and for those customers who you don't have email or mobile phones numbers, you'll receive a CallMe prompt to telephone them. Each customer will only receive one message.

1.3.1 Post Messages

If you've selected Post as one of the delivery methods you will need to print these messages (or mailing labels). Go to the Reports Tab & click on one of the following reports to do this:

- Messages for Printing (1 per page). This report prints out 1 postal message per page with the clients address located correctly for a standard window envelope.
- Messages for Printing (3 per page). This report prints out 3 postal messages per page in a post card format (3 post cards to one A4 sheet). If using this format, message should be a suitable length to fit in the space available.
- Mailing Labels - Messages. This prints out a mailing label for each customer receiving a postal message that is suitable for a variety of postal items.

1.4 Editing an AutoMessage

If you decide you want to alter or edit the Message Template being used by the AutoMessage after it has been created.

1. Change the Message Template if necessary and click Save
2. Change the Marketing List if necessary and click Save.
3. Make any other changes to the AutoMessage and click save on the AutoMessage. This will update the AutoMessage to take into account the changes.

1.5 Previewing an AutoMessage

Once you have created an AutoMessage you can preview all the messages in the AutoMessages by selecting the AutoMessage report and the appropriate AutoMessage (on the Reports tab). Note - this report only displays messages due in the next 7 days. To preview just one example of a message from an AutoMessage campaign, go to the Message Tab and select a customer, select a delivery method (text or email) and then select the message template.

1.6 AutoMessages not sent on a single manually entered date

You can also use AutoMessage to send out a message(s) based upon a date that is relevant to your customer. This could be a Birthday, an Appointment date, or any date that you have recorded on your customers file (in a date Attribute field).

To do this follow the same steps for **When** but click on the 'Manually entered date' drop down box and select one of the other available options to trigger the AutoMessage. Then decide if you want to send the Messages before, on, or after the trigger date you have chosen. If it is before or after the trigger date (e.g. one day after an appointment), then set the appropriate time.

1.7 AutoMessage Ideas

Everyone likes to be looked after and to be treated special. Here's a few ideas on how AutoMessage lets you do just that.

You can set up AutoMessage to automatically send out personalised birthday greetings. After all, we all know our birthday is an important day for each and every one of us.

Many Kitomba™ users use AutoMessage to send out personalised marketing or promotional messages. Particularly marketing material that generates business for you. Perhaps you might send a special offer for a limited time - people love a good bargain.

If you want to stay in touch with your customers, or if you want to let them know what special events are happening at your business, you can send out special notices or regular newsletters. Keep in mind you want to be telling your customers things that are of interest to them.

The fact that Kitomba™ can trigger an AutoMessage off any date you record on a customer file allows you to do some pretty creative things. Imagine sending a note to your customer a few days before their partners birthday, or if they saw you as part of their wedding preparation, a personal note on their wedding anniversary!

Another use of AutoMessage is to use it to send out personalised customer satisfaction surveys after they've been in to see you. You can get direct feedback

Once you have created an AutoMessage you can:

- Preview how a single AutoMessage will appear on the Message Tab (section 5)
- Preview all the AutoMessages from the Report tab (select the AutoMessage report).

If you decide you want to alter or edit the Message Template being used by the AutoMessage after it has been created.

- Change the Message Template and click Save
- Run the AutoMessage option from the File Menu. This will update the AutoMessage to take into account the edited Message Template.