Instructions – Sending the Royal Commission Response email to your clients.

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Mercury

- 1. In the **CRM** tab, highlight the people you would like to email (you can select multiple at one time by holding down Ctrl and clicking on the names). If you would like to email all your contacts go to step 2.
- 2. Click the **Email Merge** drop-down list. Choose **All** or **Selected**. If you click **All**, it will merge to everyone listed in the CRM.



3. Click Apply Email Template button to apply the "Marketing - #Royal Commission Response" template a which has already been created.

Email Merge										
Content	Attach	ments (0)	Recipients (1)							
Enter con	From Subject: tent as:	John Slaug Rich Tex Raw HT	hter <john@conne ct ML (No preview av</john@conne 	ective.c	om.au	ı> (Perso	onal Er	nail)		
(Content:	Stamp	Insert Tag 🗸	B ₹	I A	 ▼A	\$ ∙	E P	≣ %	

Name	Subject
Appointment	Meeting
DOCUSIGN Credit Proposal Disclosure (CPD) Email Template	Credit Proposal Disclosure
DOCUSIGN Credit Quote Email Template	Credit Quote
How to explain the Royal Commission to your customers	How to explain the Royal Commission to your customers
Marketing - #CHOICEMATTERS pledge campaign	Less Choice? Higher Interest Rates? No Thanks!
Marketing - 3 reasons to buy a boat, bike or jet-ski	3 reasons to buy a boat, bike or jet-ski this holiday season.
Marketing - CAF - Creative SME Lending Solutions	Need a more creative finance solution for your business?
Marketing - CAF - Family car finance	Want to find a way to make a new family car more affordable?
Marketing - CAF - Fast Truck Finance Solutions	Hit the road sooner with fast truck finance!
Marketing - CAF - New Car Finance	Looking to buy a new car?
Marketing - CAF 3 reasons to buy a boat, bike or jet-ski for Chri	3 reasons to buy a boat, bike or jet-ski for Christmas.
Marketing - CAF EOFY 2018 - Car finance	Get your car finance approved now!
Marketing - CAF EOFY business equipment	Update your business vehicle or equipment before June 30
Marketing - CAF Finance a HAPPY Christmas! (CAR)	Take a sensible approach to finance for a happy Christmas.
Marketing - CHL - Did you know you can get a home-brand ho	Did you know you can get a home-brand home loan instead?
Marketing - CHL - Save on interest by paying off your home loa	Save on interest by paying off your home loan early
Marketing - CHL - Would you be happier with a home-brand ho	Would you be happier with a home-brand home loan?
Marketing - CHL - You'll love the after-care service you get with	You'll love the after-care service you get with our home-brand I
Marketing - Happy Holidays - non-denominational email	Best wisnes for the holiday season!
Marketing - Royal Commission recommendations	Royal Commission recommendations: what you should know
Marketing the value of mortgage broking	nongage brokers help anve hearing competition
Pre-approval	Congratulations! Your home loan pre-approval is confirmed.
Pre-approval Follow Up 1	Do you need us to renew your home loan pre-approval?

4. Insert tags from the Insert Tag drop-down list.

Tags allow you to personalise your email, so it addresses each recipient by their first or full name. Clicking on the tag will insert the tag wherever your cursor is currently located in the email.

• Note: You can click on the Full-screen button to expand the email merge window into full size.

Email Merge		⊗						
Content Attach	ments (0) Recipients (4)							
From:	Angela Hallett <angela@connective.com.au> (Profile 1)</angela@connective.com.au>	-						
Subject:	Son Application							
Enter content as:	t as: Rich Text Raw HTML (No preview available)							
Content:	Stamp Insert Tag • B I U S E E E E Paragraph • Font Family • Font Sizes • % D							
	Ani u regarus							
	Send Merged Emails (4)	incel						

- 5. Click the **Recipients** tab to review each recipients message.
- 6. Click Send Merged Emails to send.

Contact your BSM or <u>Helpdesk@connective.com.au</u> if you have any issues.

Digital Marketing Hub

You can follow the campaign wizard, so you don't miss a step.

1. From the home Navigation page, click on **Create New Campaign** located at the top of the screen. Alternatively, click on "Campaigns" in the sidebar and click "New Campaign" at the top right of the screen.

Q. Search	Getting Started Safe complete Consult of Form Vieguale Services The		Create New Campaign -
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2. Name your campaign.

Enter a name to he	Campaign Name Ip you remember what this campaign is all abou	t. Only you will see this.	
Car Finance Asset Fina	ance July 2018		
	Select Campaign Type		
Standard Send a regular, one-time email campaign.	Automated Create custom sequences of email actions and conditions	Auto Responder An automated campaign that will send after someone subscribes.	
Split Testing Compare multiple emails	RSS Triggered Sends whenever your RSS	Date Based Send on contact birthdays,	

3. Select the list of contacts who you wish to receive the campaign. You must have already created the list and added contacts to that list.

Select	List(s)	
Select the list(s) you would like to send this campaign to. Filt	er your campaign to specific contacts that match con	ditions.
.c. Segment Selected List(s)	Q. Search lists	
List Name	Contacts #	
Car finance List		
Commercial Loans	5	
John's Clients	23	
Marketing List	4	
Master		

4. Select the **#Royal Commission Response** template design from the library to use as the basis for your email.



5. Select the **person icon** to select the **'broker preferred full name'** (who the email is coming from), & **'broker email'**. Then check that the **'default name'** & **'default email'** (so a client can respond) are correct.

This way, if there is no Relationship Manager assigned to a contact, the email will be sent from the default Relationship Manager.

Sende	er Details			2	×	
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6. Once the email is complete, review all details on the campaign summary screen.

Tip: Always send a test to yourself, before you send the email to your clients! You can do this from the email summary page.

7. To send the campaign, click on the Send now button at the top of the screen.

1 Previous	Type Lat Design Summary Send	Save & Ect
	Campaign Summary	
	Subject Car Finance Asset Finance July 2018 Edit	
	From John The Broker (John@thebroker.com.au)	
	List(s) John's Clients (23 Contacts)	
	Address Connective, 567 Collins Street, Melbourne Vic 💌	
	Options	
	Unk Tracking @ Clustomize CM	
	Google Analytics () Campaign Archive () Public Private	
	Delivery (this campage will send immediately) Schedule	

Contact your BSM or Marketing HUB <u>marketinghub@connective.com.au</u> if you have any issues.