

How to Create a Marketing Event

Description

Use this function in the Marketing Events tab to allow you to plan, record, and manage marketing events, RSVPs, and name tags as part of your sales efforts.

Step by Step


- 1** Navigate to the Marketing Events tab
- 2** Click **New**
- 3** Enter the **Marketing Event Name**
- 4** Specify your **Community**
- 5** Select the **Type** of event
- 6** Enter the **Event Date**
- 7** Specify a **Marketing Plan** if you have one preset
- 8** Enter the **Budget**
- 9** Enter the **Target Number of Visitors** for the event
- 10** You may also select an **Audience**
- 11** If the event is being coordinated by a third party, specify an **Account** and **Contact** as your main point of contact in organizing the event. They should already be entered in the system for your outreach partners.
- 12** Select the **Analysis Category** to specify whether the event is *Onsite*, *Offsite*, or a *Trade Show*.
- 13** Select the **Ranking**
- 14** Click **Save**

Marketing Event
Mother's Day




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[Open Activities \(4\)](#) | [Activity History \(1\)](#) | [Notes & Attachments \(0\)](#) | [Attendees \(7\)](#) | [Prospects \(40+\)](#)



Marketing Event Detail [Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#) [Import](#)

Marketing Event Name	Mother's Day	Owner	 Larry Wieskopf [Change]
Community	iaRetirement - GTA	Event Date	2/2/2012
Type	Marketing; Resident Lifestyle		

▼ **Planning**

Marketing Plan		Audience	Prospect; Resident
Budget			
Target No. of Visitors			

▼ **Offsite Event Information**

Account	
Contact	

▼ **Marketing Analytics**

Analysis Category	Onsite
Ranking	A - Top 10%

15 Click **Invite Prospects**

16 Enter an **RHS Action**. This is a subject line for the list being created.

17 Specify **From Initial Contact Date** and **To Initial Contact Date** if you would like to filter out only Prospects and Inquirers with contact dates within a given time frame

18 Check the box to **Include Inquirers** on the list

19 Check the box to **Include Prospects** on the list

20 Verify **Community**. If incorrect, specify the correct **Community**.

21 Add **Filters** to select specific Prospects. Available fields are fields that appear on the Prospect page.

a. Select a **Field**

b. Select an **Operator**

c. Select a **Value**. You may select multiple values by holding down the Ctrl key and clicking on multiple items.

d. To add additional filters, click the **Add Filter** button

22 Click **Save RHS Action**

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RHS Action: Autumn Concert

EZLabel Owner: []

From Initial Contact Date: [] [10/23/2015]

To Initial Contact Date: [] [10/23/2015]

Community: RHS Sample Community

Advertising: []

Marketing Event: []

Include Inquirers:

Include Prospects:

Filters 2

Add Filter

Field	Operator	Value	Action
Prospect Status	equals	Waiting to Sell Home 6 - 12 Months	Delete
		Preliminary Search Not Ready Yet	
		Unqualified Unknown	Delete
Status	equals	Initial Call	Delete
		Deposit	
		Lost	
WL Floor Plan	not equal to	Studio	Delete
		Studio Plan A	
		Studio Plan A Deluxe	

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Save RHS Action | Reset

Cancel

23 At the top of the page, click **Generate Email List** or **Generate Address List**

24 Click the **EMx** number of the report that is generated

RHS Action

Edit | **Generate Email List** | **Generate Address List** | Cancel

RHS Action: Autumn Concert

EZLabel Owner: Neomi Tsekhman

From Initial Contact Date: []

To Initial Contact Date: []

Community: RHS Sample Community

Advertising: []

Marketing Event: []

Include Inquirers:

Include Prospects:

RHS Reports

Action	Report	Community	Created Date	Number of Lines	Owner
Delete	EMx-0015187	RHS Sample Community	10/26/2015 11:38 AM	119	Neomi Tsekhman

25 You may pare down your list by searching for key terms (e.g., name, city) and deleting unwanted entries

▼ Line List

Delete Selected Checkboxes 3

Search: Calgary 1

2	EMxLines Name	First Name	Last Name	Address 1	Zip City State	Email	Description
<input checked="" type="checkbox"/>	1038428	Mr. Frank Butt & Mrs. Irene Cosway	Butt	935 Ranchview Cr. NW	Calgary, AB T3G1A4		Initial Call
<input checked="" type="checkbox"/>	1038429	Mr. & Mrs. John and Maria Laratta & Mrs. Irene Cosway	Laratta	85 Edenstone Way NW	Calgary, AB T3A4T5		Initial Call
<input checked="" type="checkbox"/>	1038430	Mr. & Mrs. Dave & Joyce Curwen & Mrs. Irene Cosway	Curwen	c/o 148 Gleneagles View	Calgary, AB T4C1W1		Initial Call
<input checked="" type="checkbox"/>	1038433	Jack & Dorothy	Klatt	1124 Northmount Drive N W	Calgary, AB T2L 0C4		Initial Call
<input checked="" type="checkbox"/>	1038437	Leslie	Lee	62 Christie Estate Terr. SW	Calgary, AB T3H 2Z5		Initial Call
<input checked="" type="checkbox"/>	1038438	Pauline & Bill	Smith	779-81 St. SW	Calgary, AB T3H 4C6		Initial Call
<input checked="" type="checkbox"/>	1038439	Mr. & Mrs. Pauline & Bill Smith & Mrs. Irene Cosway	Smith	779-81 St. SW	Calgary, AB T3H4C6		Initial Call

- 26** Click **Record Task** to add a task to each Prospect record to show this mailing. The task is assigned to the user creating the list and can be recorded as a complete activity.
- 27** Click **Create Follow Up** to create a follow-up activity on each Prospect record. The task is assigned to the owner of the Prospect record.
- 28** Click the **Add to Event** button to add the list of Prospects to the event
- 29** To manage your RSVPs, navigate back to your event's profile page and click the **RSVPs** button
- 30** The RSVP Manager will pop up. Here, you can specify which Prospects or Residents RSVP'ed to the event, the number of people to attend, and after the event takes place you can record who attended. You can also add additional Prospects directly from this manager.

RSVP Create & Add Prospect

Save this Section Cancel Add Attendee

RSVP(s): 0, Attended: 0, Rows: 126

RSVP	# RSVP	Attended	# Attended	Prospect	Resident	Contact	Action
<input type="checkbox"/>	0	<input type="checkbox"/>	0	aaa_test4			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Radulescu, Alex			Add Prospect Delete
<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	3	Acorn, Art & Joyce (Art & Jo			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Albert, June (June Albert)			Add Prospect Delete
<input type="checkbox"/>	0	<input type="checkbox"/>	0	Albert, June (June Albert)			Add Prospect Delete
<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	0	Anderson, Rebecca (Rebec			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	3	April, Abram (Abram April)			Add Prospect Delete
<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	2	Baron, Ken (Archie & Irene)			Add Prospect Delete

- 31** When you finish working with the RSVP Manager, click **Save this Section**

Related Lists

Open Activities – Use this list to create new tasks to help plan and manage the event.

Activity History – This list displays all completed tasks, logged phone calls, expired events, and emails for the event.

Notes and Attachments – Use this section to attach any documentation or notes having to do with the event.

Attendees – This is a list of people expected to attend the event.

New Prospects – Use this section to upload the names and related information for new prospects who may be interested in your community as a result of the marketing event.

Open Activities New Task New Event Open Activities Help ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Prepare Menu		✓	4/1/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Order Room Decorations		✓	5/7/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Work with Resident Ambassador's on planning		✓	5/7/2013	Not Started	Normal	Larry Wieskopf
Edit Cls	Prepare Muffins for Event (20)		✓	6/23/2013	Not Started	Normal	Frank Leung

Activity History Log A Call Mail Merge Send an Email View All Activity History Help ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Review last year's event and plan		<input type="checkbox"/>	2/2/2012 2:00 PM	Larry Wieskopf	4/8/2013 1:34 PM

Notes & Attachments New Note Attach File Notes & Attachments Help ?

No records to display

Attendees New Marketing Events Attended Attendees Help ?

Action	Audit No.	Prospect	Contact	Resident Name	Resident	Prospect Attended - PL
Edit Del	MEA-1000000			Dr. John Adams	R-10081	
Edit Del	MEA-1000001		Julie Adams			
Edit Del	MEA-1000002	Swanson, Albert (Albert & June)				
Edit Del	MEA-1000004	Smith, Bill (Bill Smith)				
Edit Del	MEA-1000005	Whithorne, Walt (Walt & Judith)				
Edit Del	MEA-1000009	Swanson, Albert (Albert & June)				
Edit Del	MEA-1000012	Lazer, Boris (William Lazer)				

Prospects New Prospect Prospects Help ?

Action	Name
Edit Del	Downing, Ronald (Ronald Downing)
Edit Del	Down, Robert (Robert & Judy)
Edit Del	Swanson, Albert (Albert & June)
Edit Del	Thompson, John (John & Jill)
Edit Del	Williams, Barb (Bob & Barbara)