Campaign Mapping Worksheet

Please complete one set of questions for each planned, partially built, or fully built campaign.

Question	**Response**	**TE Best Practice**
What is the Expert Content name of the campaign?	**Lead Purchase General - High Touch - 25 emails - 12 months**	
What is the description of this campaign?		Describe your campaign in one or two sentances in a way that makes sense to your end-users. It will be visible to any Total Expert user who is running the campaign.
Will this campaign be turned on for all users or only selected users?		Best practice is to turn the campaign on for all users who will benefit from the campaign.
What is the display name of this campaign?		Use naming conventions that make sense to you and your end-users.
Who within your organization is responsible for maintaining the campaign?		Usually this is the marketing admin and any others who would edit the campaign.
What is the source(s) of the lead? - Example: Lead Capture App, Single Property Site, Online Ad, Zillow		If your sources require different messaging, it will be better to have two or more different journeys so you have proper messaging going to your contacts. If the sources can have the same messaging, list those sources together for this journey.
What is the success criteria for this campaign? - Example: A new application submitted through the LOS (example: Pre-approved milestone from in-process campaign) - Target conversion percentage - Target conversion days		Understand the metrics of your current campaigns and use that to determine the success criteria.
What is the failure criteria for this campaign? - Example: Cold lead, unsubscribe or manual removal from campaign		Know the failure metrics of your current campaigns and use that to determine the criteria for leads that fall off this campaign.
What do you want to do with leads that meet failure criteria? - Example: Add to a Newsletter or Holiday campaign		Our best practice is to place these leads on a lifetime campaign to keep them in the loop with your company's offerings.

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Is this campaign replacing an existing campaign? - If Yes, from what platform and what is the plan to sunset the legacy campaign? "		If possible, keep your current campaign running until the journey is tested and ready, and then sunset the existing campaign an turn on your journey for the organization.
Do you have custom communications for this campaign? -If yes, Create your emails with this naming convention "Campaign name - Email #" ***Emails must be created in Total Expert prior to campaign workshop		If you are using custom communication, make sure that your naming convention is "Campaign Name - Email #" so it is easy to find when placing emails in the journey builder.
Will the campaign assign tasks or notifications to loan officers or partners to take action or will this be purely automated? - If yes, what tasks or notifications will be assigned?		Total Expert and complete the task using specific outcomes that you can create (usually prompting a call from the end-user to the customer). Use Notifications if you don't need the end-user to go into the platform, but you still want to give them a
Will you be checking for email activity, such as email opened, or link clicked? - example: Create a task to follow up with a scripted phone call if a link is clicked.		If using a task to reach out after an email is opened or link is clicked, add a call script in the task description for your end-user to reference.