HELLO,
TRELLO!

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Tracking digital campaigns is as easy as 1, 2, 3 and red, orange, green.

1. A CONTRACT IS CONVERTED IN SALESFORCE ... THEN A CARD IS CREATED IN TRELLO.

The business day following a digital campaign or renewal conversion in Salesforce, a Trello card is added to your dashboard for the contract with the following title:

CONTRACT NAME {PROFILE ID NUMBER} 00/00/2019*
*CONVERSION DATE

The Trello card will store the Salesforce ID, contract number, product lines, date ranges, profile status, annual engagement report, and any client activity for this campaign for 12 months.

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2. CONTENT COLLECTION CHECKLIST: SEND US CLIENT INFO & SELECT ✓ OPTION 1, 2 OR 3

☑ **Sales - We need BOTH the contact person's info AND confirmation of 1, 2 or 3...**

☐ Option 1: Collaborative "full-service" with a screen share call with the client contact.

☐ Option 2: Client is OK with us optimizing or building their profile for them - but we do NEED permission

☐ Option 3: Client wants to login to submit materials or be sent spec sheet materials

TRELLO TIPS & TRICKS:

RED LABEL
ORANGE LABEL
GREEN LABEL

On your Trello dashboard, card labels are color-coded to advise you if action is required.

RED labels indicate that we are waiting on something. Click on the card for the details.

- NEED CLIENT CONTACT INFO
- NEED CLIENT CONTENT COLLECTION PREFERENCE
- NEED PROFILE MATERIALS
- NEED DIGITAL SIGNAGE MATERIALS
- NEED PROFILE REVIEW CALL
- eNEWS
- LATE CONVERSION
- EB HOST LOCATION
- CLIENT CONTACT INFO RECEIVED
- PROFILE IS SCHEDULED
- DIGITAL SIGNAGE IS SCHEDULED

3. WE OPTIMIZE THAT CAMPAIGN FOR AN IN-MARKET VISITOR:

Based on your client's content collection preference, your Content Coordinator will work with the client to ensure that we have everything we possible could need to get and keep the attention of an in-market visitor AND provide the necessary information & details to make an informed purchase decision or change someone's plans for that day.

PHOTOS & VIDEOS ALWAYS NEED APPROVAL

Client approval is required for use of any photos & videos we upload

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TAGGED... YOU'RE "IT"

Trello Account @username

When you see your initials or image assigned to a card, you should receive e-mails or text notifications (from Trello) whenever this card is updated. (*Read them!*)

Wanting to call attention to YOUR new notes/comments? Simply tag any Trello account user name (using their @accountname) in your comments section to activate an e-mail or text notification to them right away.

🔔 *Pay attention to any cards with a "bell" icon, indicating some activity since your last Trello.com login.*

ONLY YOU CAN UPDATE YOUR TRELLO USE ACCOUNT (AT TRELLO.COM)

COMMONLY USED TRELLO CARD ICONS:

📎 PAPER CLIP
Indicates that the card includes attachments, such as Engagement Reports, PDFs of e-mail exchanges with clients, and profile screen shots for review or download.

💬 TEXT BUBBLE
Indicates that the card includes notes. The first note added to a card is usually the confirmation that a profile is scheduled (including preview links to both the web & EB profile) OR a note indicating that we need materials and client contact information to proceed.

≡ DESCRIPTION
Click any card on the dashboard to open it, and you will see a section called "Description" where your converted contract information is available. This includes the contract number, Salesforce ID, GP ID, and the specific date ranges and sectors you sold.

☑ CHECKLIST (0/4) OR (0/8)
Each card typically includes a checklist to track progress for Content Collection or Profile Reviews. The first number indicates how many items on the checklist have been completed, and the second number is the total number of steps. (Example: 2/4)

🕐 DEADLINE (WITH A SPECIFIC DATE)
When a new card is created, a deadline is assigned to ensure that we have what we need to move forward. Based on the deadline assigned to a card, e-mail or text notification reminders will be sent (from Trello.) **The deadline will change colors to yellow or red if a deadline is approaching or has been missed.**
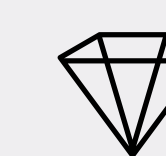
💎 DIAMOND STATUS
When you see a card with a diamond, you'll know that this profile received 1,000+ engagements within a month during it's previous campaign and is likely a top performer in your network.