**RAMS** | Campaign Request Form (CRF)



**TEMPLATE A MODULES**

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**MODULE REQUEST FORM**

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**EMAIL
REQUEST FORM** (click to download)



**CAMPAIGN REQUEST FORM** (click to download)

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**CAMPAIGN DETAILS**

|  |  |
| --- | --- |
| **Campaign ID** |  |
| **Campaign name** |  |
| **Program** | *e.g. Customer Marketing Program (CMP)* |
| **Campaign manager/ approver** (name and email address) | *There can be only one approver for a campaign on Adobe. Provide email address of the campaign approver* |
| **Briefed on date** |  |
| **Deployment date** |  |

**INTRODUCTION**

**Background and top-line objectives**

*Provide the background for the communication and business objectives. If the message will sit within an existing program, please detail here as well.*

**Key timings**

*Campaign roll-out timings*

*e.g. Messages within this campaign are always on and trigger weekly, these will commence from 15th of September when the new n3Hub/Adobe solution goes live.*

**MESSAGE INFORMATION**

|  |  |
| --- | --- |
| **Message Code & Name** | *The message code is the unique identifier for the message used by both n3Hub and at RAMS. The name of the message e.g. HAE0001 – Slippers* |
| **Product Group** | *The product group the message is targeted to.* *E.g. Home Loan, Savings.* |
| **Product** | *The product the message is targeted to; this is a subset of the product group.* |
| **Primary Objective** | *The primary objective of the message.**E.g. Sales, Service, Compliance, Retention, or Acquisition (unknown lead)* |
| **Secondary Objective** | *The secondary objective of the message; this is a subset of the primary objective.* *E.g. Onboard, Registration, Grow, Engage, Service, Save/Win-back, Prospect Generation or Research* |
| **Start Date** | *The start date of the message i.e. the first date that the message should be included in decisioning.* |
| **End Date** | *The end date of the message i.e. the last date the message should be included in decisioning. If the message is continuous or the end date is unknown, then enter Ongoing.* |
| **Decisioning Frequency** | *Detail how often the message will be sent out (daily/weekly/triggered).* |
| **Target Method** | *Detail how a customer is chosen to receive this message. Enter one of the following: Customer initiated (request), Customer Trigger (behaviour/life event), RAMS initiated (logic provided), RAMS initiated (File Provided)* |

**MESSAGE RULES**

**Qualifying Criteria**

*Enter the qualifying criteria for the message. These are the criteria a customer must meet to be considered for the message.*

*NB: even if a customer meets the qualifying criteria, they may not receive the message due to Global, Program, Channel, Product, Prioritisation or Recency and Frequency rules.*

|  |  |  |
| --- | --- | --- |
| **Business Logic** | **Data Logic** | **Operator (And/Or)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Commonly applied exclusions (delete as appropriate)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**In-Scope Channels**

*Indicate which channels are in scope for the message; these are the channels for which copy and content have been created.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Channel** | **In Scope (Y/N)** | **Channel Logic**(e.g. dim\_CustomerMailingPreference.DirectMail = 1) | **Channel**(please provide the final number to be targeted) |
| Email |  |  |  |
| Direct Mail |  |  |  |
| SMS |  |  |  |

**Fulfilment Rules**

*For each in scope channel detail the fulfilment action required if the customer selects ‘Yes’. If no fulfilment action is required then enter n/a.*

*Note that in many channels the customer may be given the option of entering information e.g. a phone number or email address, therefore there may two variations of ‘Yes’ (‘Yes’ / ‘Yes with Data’).*

|  |  |  |
| --- | --- | --- |
| **Channel** | **Interaction Event** | **Fulfilment Rule** |
| Email |  |  |
| Direct Mail |  |  |
| SMS |  |  |

**CHANNEL SPECIFIC VARIATIONS** (provide details for the channel(s) that is/are applicable)

**Email**

*Please capture email instructions here and use the Email Request Form (ERF) to detail out the message properties, eDM copy, hyperlinks and creative assets.*

|  |  |
| --- | --- |
| **Email** | **Name** |
| Email template | *Is it using the existing template or is it a bespoke build?* Template A Modules |
| Email Copy and Assets | *Enter Email Request Form filename* |

*If variables are included in the eDM body copy, detail where the data to populate variables is found. The variable descriptors need to be consistent across the campaign request form and the email request form.*

**Standard Fields –** These fields can be used as-is for including variable content on the email.

|  |  |  |
| --- | --- | --- |
| **Field name** | **Description** | **Field definition** |
| FirstName | Given name of the message recipient | VARCHAR(60) |
| LastName | Family name of the message recipient | VARCHAR(60) |
| Title | Honorific title of the message recipient | VARCHAR(20) |
| EmailAddress | Email address of the message recipient | VARCHAR(150) |
| MobileNumber | Mobile number of the message recipient | NUM(20) |

If you require additional data fields (typically used for personalisation), they will be populated as a **Variable or Token Fields**. Please instruct us of those fields below. Mapped field names should be exactly as they appear in the data file. Note this box is to be completed if there is no field name already set up within the standard field list above. \*PII stands for Personal Identifiable Information and should be supplied under Token Fields only.

**Total Variable Fields available = 20**

**Total Token Fields available = 15**

| **Variable content** | **Field that this content will be supplied under** | **Description** | **PII Data** |
| --- | --- | --- | --- |
| *e.g. Product Type* | Variablefield1 | *This links to the primary shopfront* | Must not be PII |
|  | Variablefield2 | *This links to the secondary shopfront* | Must not be PII |
|  | Variablefield3 |  | Must not be PII |
|  | Variablefield4 |  | Must not be PII |
|  | Variablefield5 |  | Must not be PII |
|  | Variablefield6 |  | Must not be PII |
|  | Variablefield7 |  | Must not be PII |
|  | Variablefield8 |  | Must not be PII |
|  | Variablefield9 |  | Must not be PII |
|  | Variablefield10 |  | Must not be PII |
|  | Variablefield11 |  | Must not be PII |
|  | Variablefield12 |  | Must not be PII |
|  | Variablefield13 |  | Must not be PII |
|  | Variablefield14 |  | Must not be PII |
|  | Variablefield15 |  | Must not be PII |
|  | Variablefield16 |  | Must not be PII |
|  | Variablefield17 |  | Must not be PII |
|  | Variablefield18 |  | Must not be PII |
|  | Variablefield19 |  | Must not be PII |
|  | Variablefield20 |  | Must not be PII |
| Franchise Marketing Name\* | TokenField01 | Registered business name of a franchisee that has to be used in comms | Use for PII data only |
| Franchise Territory\* | TokenField02 | Region that the franchisee covers | Use for PII data only |
| Franchise Principal\* | TokenField03 | Franchisee’s principal’s name | Use for PII data only |
| Franchise Email1\* | TokenField04 | Primary franchisee’s email address  | Use for PII data only |
| Franchise Email2\* | TokenField05 | Secondary franchisee’s email address (if any) | Use for PII data only |
| Shop 1 Suburb\* | TokenField06 | Suburb of the primary shopfront | Use for PII data only |
| Shop 1 Phone No\* | TokenField07 | Phone no of the primary shopfront | Use for PII data only |
| Shop 2 Suburb\* | TokenField08 | Suburb of the secondary shopfront (if any) | Use for PII data only |
| Shop 2 Phone No\* | TokenField09 | Phone no of the secondary shopfront (if any) | Use for PII data only |
| Franchise Disclaimer\* | TokenField10 | Franchisee’s disclaimer that needs to appear on any communication signed off by the franchise. | Use for PII data only |
| Residex Email PostCode\* | TokenField11 | Customer’s primary security’s postcode – used to populate the relevant Residex Suburb Report url for the “Download now” button in the “Weekly Residex Email” and “Loan Anniversary Email” | Use for PII data only |
| Residex Email State\* | TokenField12 | Customer’s primary security’s state – used to populate the relevant Residex State Report url for the “Download now” button in the “Quarterly Residex Email”. It is also used to populate the relevant state in the subject headline of that email. | Use for PII data only |
|  | TokenField13 |  | Use for PII data only |
|  | TokenField14 |  | Use for PII data only |
|  | TokenField15 |  | Use for PII data only |

***\*NOTE:*** Where mentioned, the Token Fields have been pre-defined for CMP campaigns and must always remain the same for data sent to n3Hub. For AdHoc campaigns, Variable and Token Fields can be used to supply new content. **Please change the brief above to match what is being supplied in the data files for a campaign.**

*If there is conditional content, detail what is to be changed out (label this inside the Email Request Form – Message copy) and what data or targeting criteria is driving it. This could include copy, artwork, or headers.*

|  |  |
| --- | --- |
| **Conditional content** | **Data Logic** |
|  |  |
|  |  |

**Direct mail**

*Please capture Direct Mail instructions here including the File Name and any variable content needed.*

|  |  |
| --- | --- |
| **Component** | **Value** |
| Supplier | *Enter the mailhouse that will be deploying the Direct Mail here e.g. Staples* |
| File format | *e.g. CSV* |
| Field delimiter | *e.g. Comma (,)* |
| Row delimiter | *(CR) (LF)* |
| File name |  |

**Output files**

*Detail what data needs to be included in the file, including any data needed for variables in the copy. Please Include detail on where the data to populate the variables is found.*

|  |  |
| --- | --- |
|  | **<Enter filename>** |
| Order | Column name | Data type | Mandatory | Description | Data Logic |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |

**SMS**

*Enter the following details for the SMS.*

| **Component** | **Value** |
| --- | --- |
| Message Description | *Max 160 characters including spaces* |
| Opt-out | *Indicate Y/N* |
| Opt-out text | *e.g. Txt STOP TOPUP to opt out* |
| Hyperlinks | *Indicate Y/N* |
| URL |  |
| Fulfilment keyword | *e.g. TOP UP* |
| Fulfilment accepted key word variants | *e.g. TOPUO, TOPPU* |

*If variables are included in the Message Description, detail where the data to populate the variables is found.*

|  |  |
| --- | --- |
| **Variable** | **Data Logic** |
|  |  |

**FULFILMENT**

**Fulfilment Channel**

*Indicate which fields are required for the message using Y/ N. If a field is required provide either the source of the value for the field or the fixed value; this is only required for message specific fields e.g. rate:*

|  |  |  |
| --- | --- | --- |
| **Component** | **Required** | **Value** |
|  |  |  |

**TESTING**

**Testing requirements**

*Detail the testing requirements of the message, for example copy, call-to-action, imagery or persona testing.*

*Test list recipients:*

|  |  |  |  |
| --- | --- | --- | --- |
| **First name** | **Last name** | **Email address** | **Mobile number** |
|  |  |  |  |

**REPORTING**

**Success criteria**

*Detail the objectives of the message i.e. what are the measures of success for the message.*

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Goal** | **Metric** | **Measure** |
|  |  |  |  |
|  |  |  |  |

|  |  |
| --- | --- |
| **Control group requirements** |  |
| *Control group* | *Y/N. Sample size* |
|  |  |

**Reporting requirements**

*Detail the reporting requirements of the message. Please detail only those that are over and above the reports that are currently automated via Adobe Campaign*

|  |  |
| --- | --- |
| **Bespoke reporting required** | **Explanation/ Frequency** |
|  |  |
|  |  |