

Partner Event Sign-Up Engagement

03.17.2014

Andrew S. Parnell

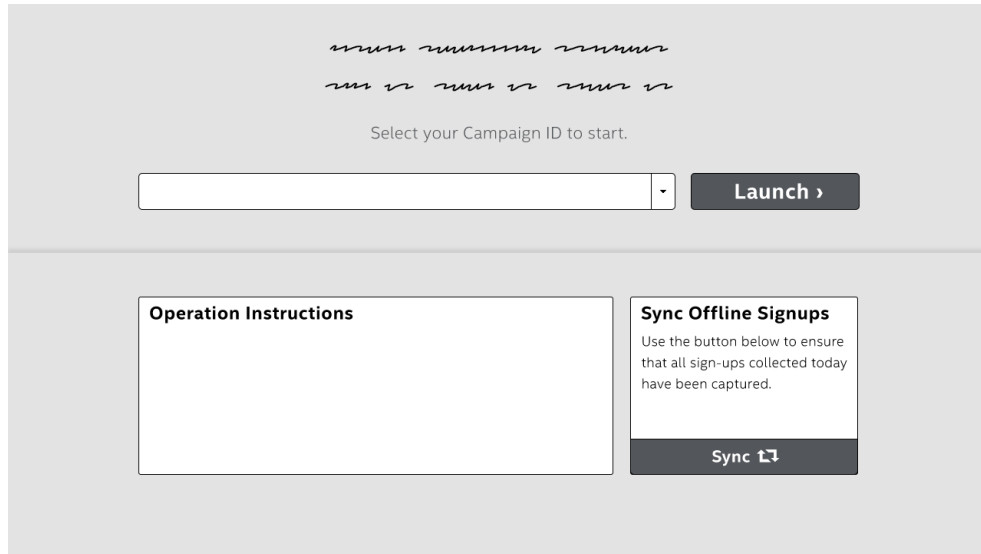
Done while working at Quango

Business Objective:

Create an application to be used at trade shows and events to collect email addresses from prospective partner members, and associate those email addresses to campaigns for tracking purposes. Follow up with those prospective partner members via email. Email should be capable of being amended with custom content.

Also create a management dashboard for creating and managing Campaigns.

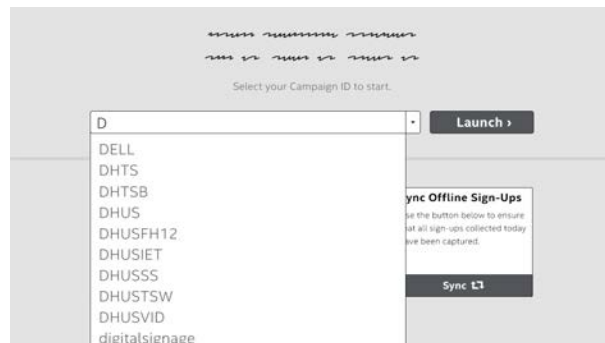
Partner Sign-up Application



Admin Screen

Application launches into the admin screen. From here, the user can select the Campaign ID or synchronize any sign-ups collected offline with the database.

This screen will also contain operation instructions for anyone using the application at an event.

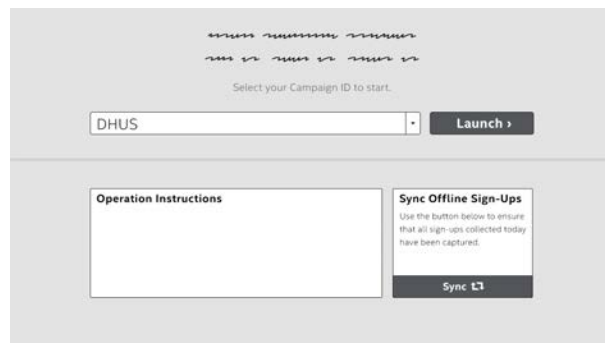
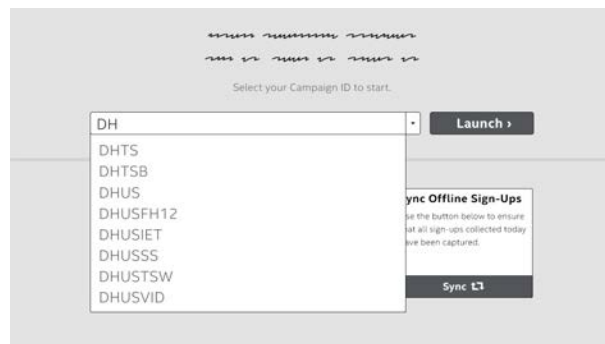


Campaign ID Selection

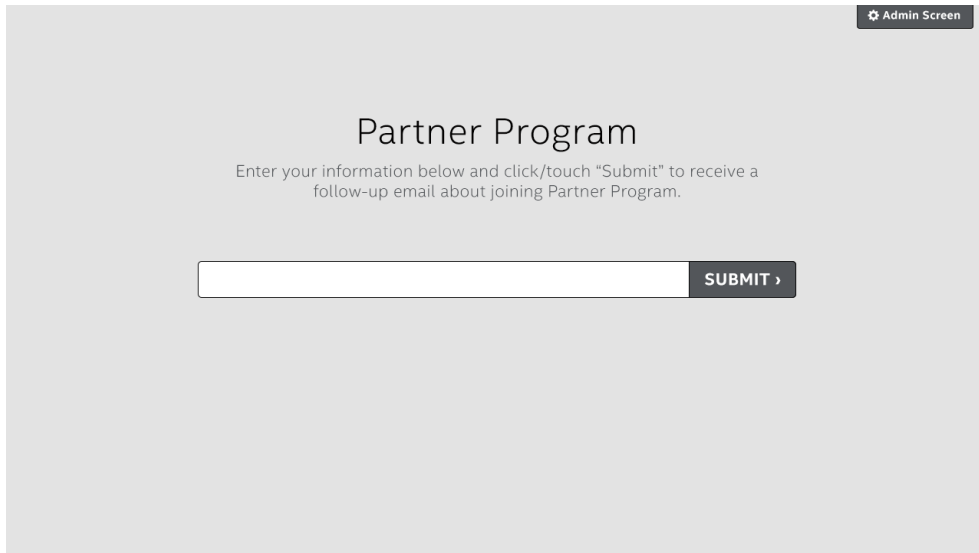
This field will take text input.

When the application is online it will also verify against available Campaign IDs.

As a Campaign ID is entered, the dropdown will limit to matching available Campaign IDs.



NOTE: The images presented here are for placement only and do not represent the final look and feel.



Admin Screen

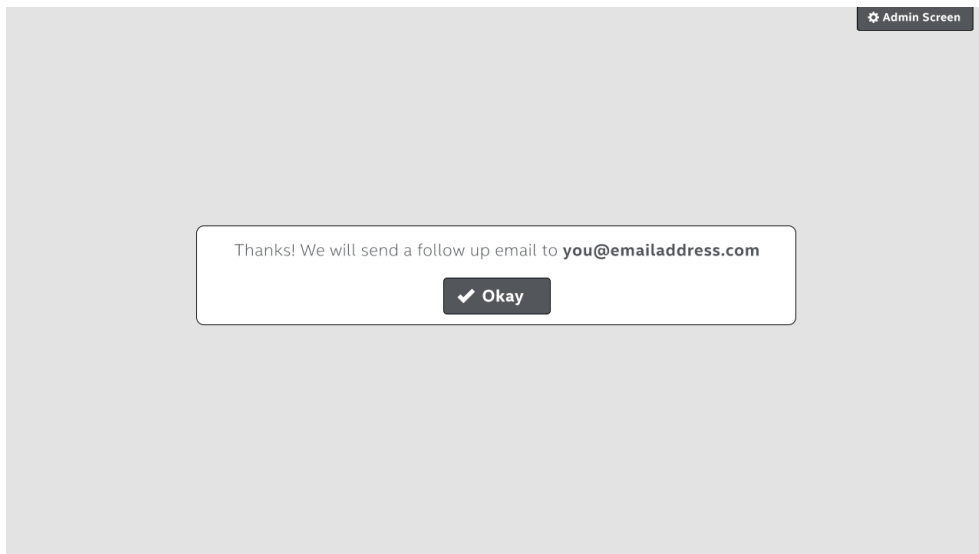
Partner Program

Enter your information below and click/touch "Submit" to receive a follow-up email about joining Partner Program.

SUBMIT >

Sign-up Screen

This screen will be available to event attendees to collect email addresses.



Admin Screen

Thanks! We will send a follow up email to **you@emailaddress.com**

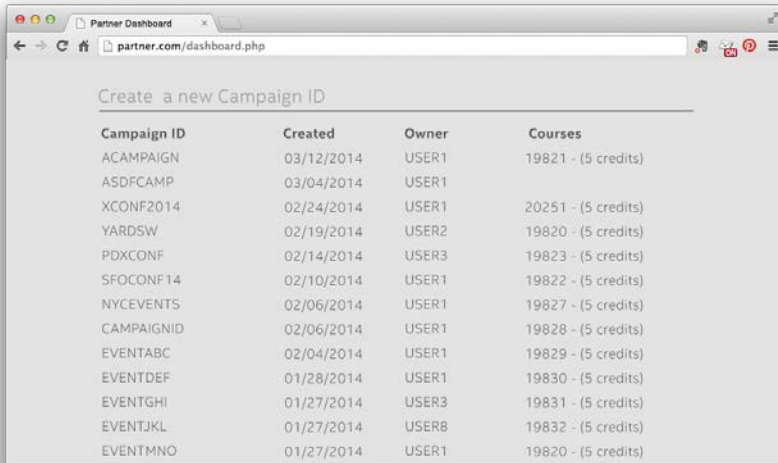
✓ Okay

Confirmation Page

Once an email address is collected a confirmation page will be displayed. This will serve to allow the user one last chance to verify their email address (and re-enter if it was incorrect).

This window will automatically close after a few seconds to reset the application for the next sign-up.

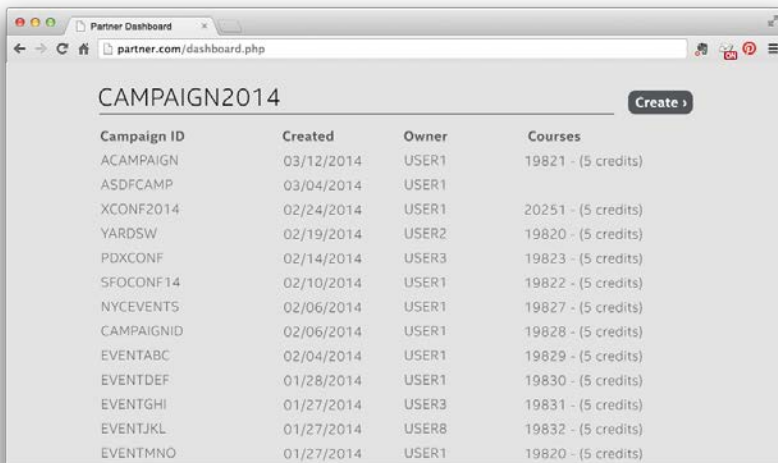
Dashboard



Campaign ID	Created	Owner	Courses
ACAMPAIGN	03/12/2014	USER1	19821 - (5 credits)
ASDFCAMP	03/04/2014	USER1	
XCONF2014	02/24/2014	USER1	20251 - (5 credits)
YARDSW	02/19/2014	USER2	19820 - (5 credits)
PDXCONF	02/14/2014	USER3	19823 - (5 credits)
SFOCONF14	02/10/2014	USER1	19822 - (5 credits)
NYCEVENTS	02/06/2014	USER1	19827 - (5 credits)
CAMPAIGNID	02/06/2014	USER1	19828 - (5 credits)
EVENTABC	02/04/2014	USER1	19829 - (5 credits)
EVENTDEF	01/28/2014	USER1	19830 - (5 credits)
EVENTGHI	01/27/2014	USER3	19831 - (5 credits)
EVENTJKL	01/27/2014	USER8	19832 - (5 credits)
EVENTMNO	01/27/2014	USER1	19820 - (5 credits)

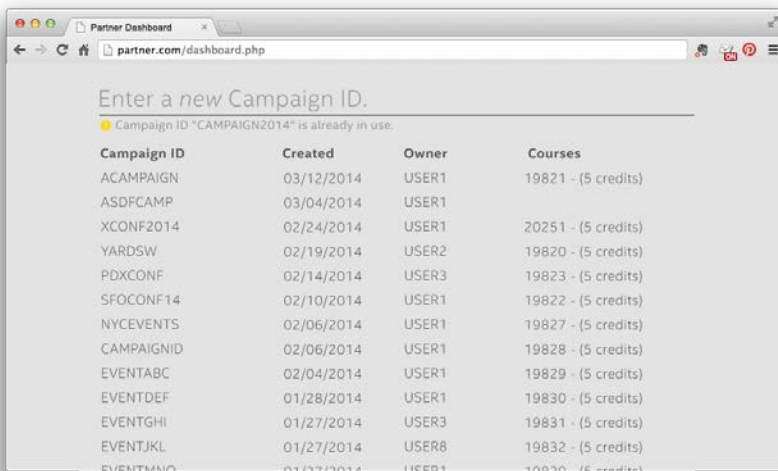
Campaign Creation

The campaign creation process will be streamlined and simplified.



Campaign ID	Created	Owner	Courses
ACAMPAIGN	03/12/2014	USER1	19821 - (5 credits)
ASDFCAMP	03/04/2014	USER1	
XCONF2014	02/24/2014	USER1	20251 - (5 credits)
YARDSW	02/19/2014	USER2	19820 - (5 credits)
PDXCONF	02/14/2014	USER3	19823 - (5 credits)
SFOCONF14	02/10/2014	USER1	19822 - (5 credits)
NYCEVENTS	02/06/2014	USER1	19827 - (5 credits)
CAMPAIGNID	02/06/2014	USER1	19828 - (5 credits)
EVENTABC	02/04/2014	USER1	19829 - (5 credits)
EVENTDEF	01/28/2014	USER1	19830 - (5 credits)
EVENTGHI	01/27/2014	USER3	19831 - (5 credits)
EVENTJKL	01/27/2014	USER8	19832 - (5 credits)
EVENTMNO	01/27/2014	USER1	19820 - (5 credits)

First step for creating a new campaign will be choosing a new Campaign ID.



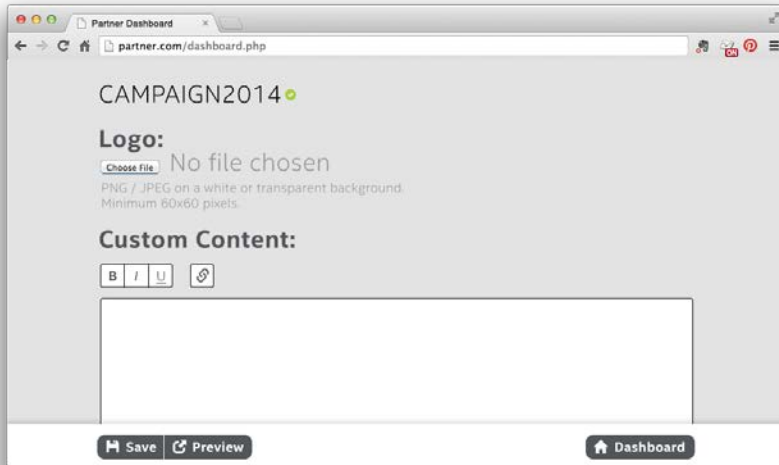
Enter a new Campaign ID.
 Campaign ID *CAMPAIGN2014* is already in use.

Campaign ID	Created	Owner	Courses
ACAMPAIGN	03/12/2014	USER1	19821 - (5 credits)
ASDFCAMP	03/04/2014	USER1	
XCONF2014	02/24/2014	USER1	20251 - (5 credits)
YARDSW	02/19/2014	USER2	19820 - (5 credits)
PDXCONF	02/14/2014	USER3	19823 - (5 credits)
SFOCONF14	02/10/2014	USER1	19822 - (5 credits)
NYCEVENTS	02/06/2014	USER1	19827 - (5 credits)
CAMPAIGNID	02/06/2014	USER1	19828 - (5 credits)
EVENTABC	02/04/2014	USER1	19829 - (5 credits)
EVENTDEF	01/28/2014	USER1	19830 - (5 credits)
EVENTGHI	01/27/2014	USER3	19831 - (5 credits)
EVENTJKL	01/27/2014	USER8	19832 - (5 credits)
EVENTMNO	01/27/2014	USER1	19820 - (5 credits)

If the desired Campaign ID is already in use, an alert will be displayed and the user will be prompted to select a new Campaign ID.

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Dashboard (cont.)



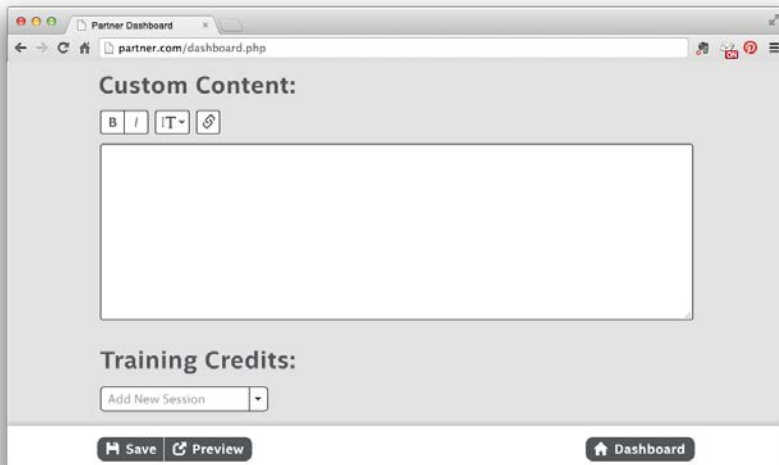
If the Campaign ID has not already been used, the campaign will be created and the user will continue on to include any campaign content (ie: Logo, Custom Content*, and training credits).



Logo Selection

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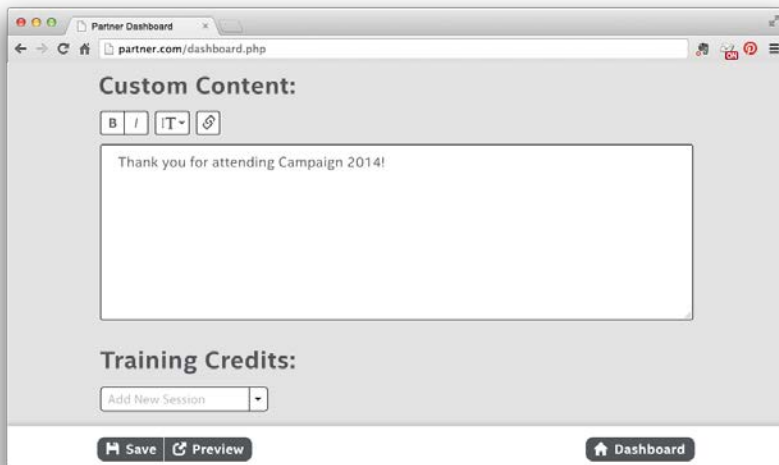
Dashboard (cont.)



*A Note about Custom Content:

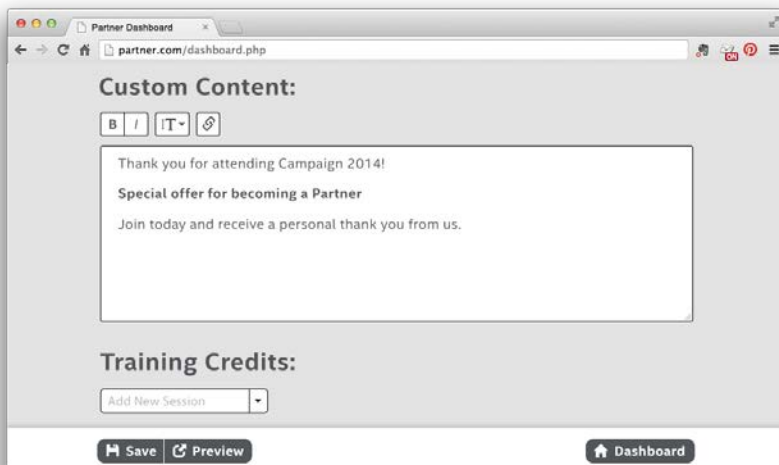
In the previous iteration of the dashboard we had provided the ability to upload a pdf flier to describe any additional incentives for users to join the program. This feature was used 7 times out of 150+ campaigns.

We recommend removing this feature, but allowing the user to generate rich content in place of a welcome message & pdf flier. This will also allow any special offers to be included in the emails sent out by the event sign-up application.



Custom Content (Welcome Message)

Custom content used to display a welcome message.

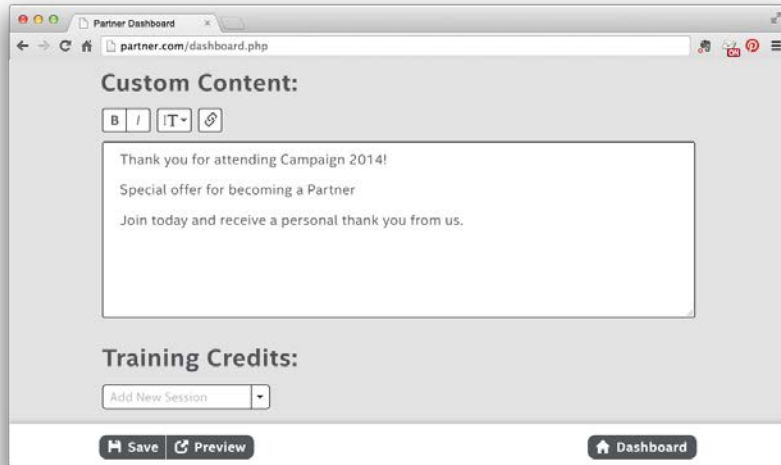


Custom Content (Welcome Message + Special Offer)

Custom content used to display a welcome message as well as a special offer.

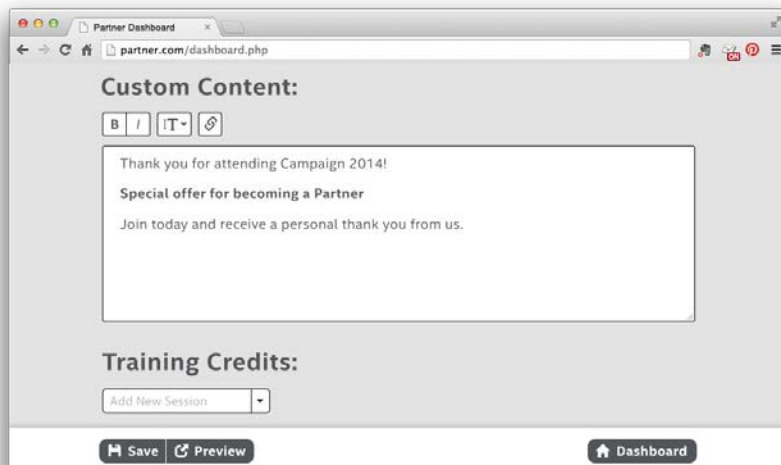
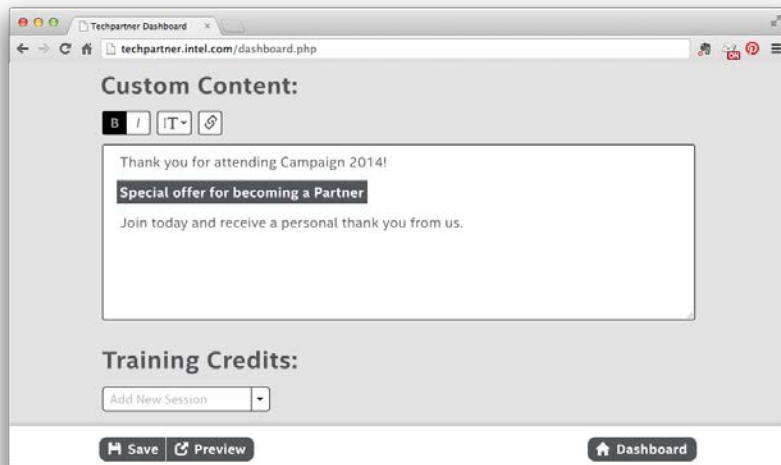
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Dashboard (cont.)



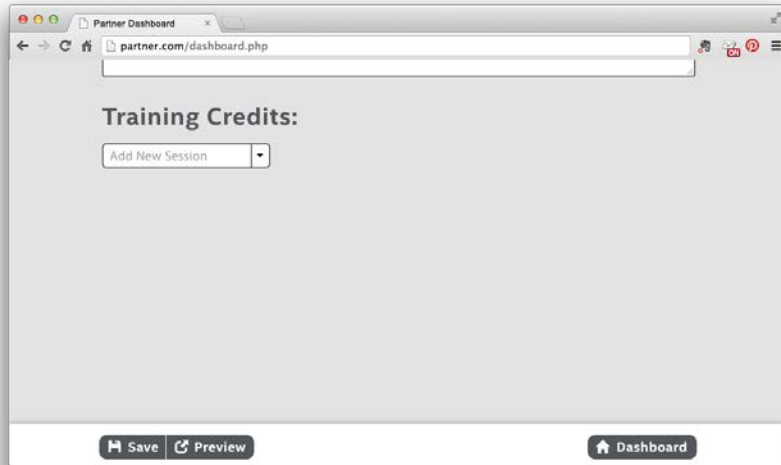
Custom Content - Formatting

Custom content will handle bold/italic, headers, and the ability to add links into the welcome text.



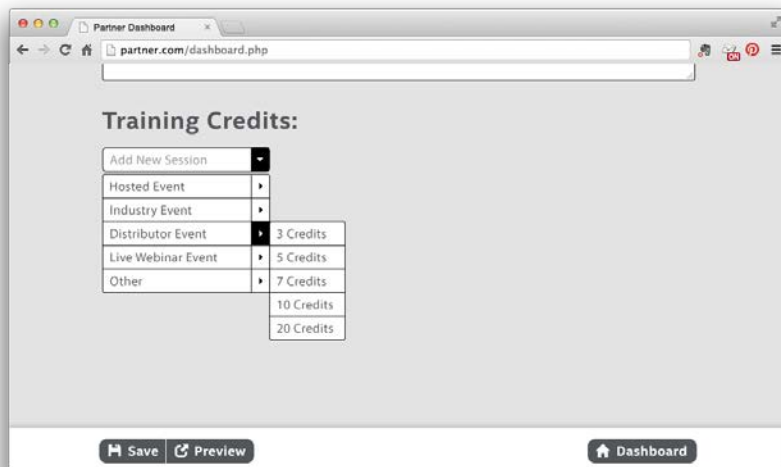
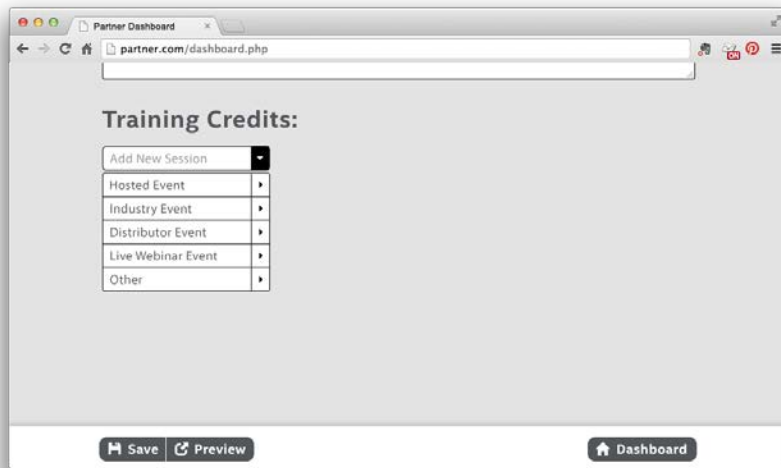
NOTE: The images presented here are for placement only and do not represent the final look and feel.

Dashboard (cont.)



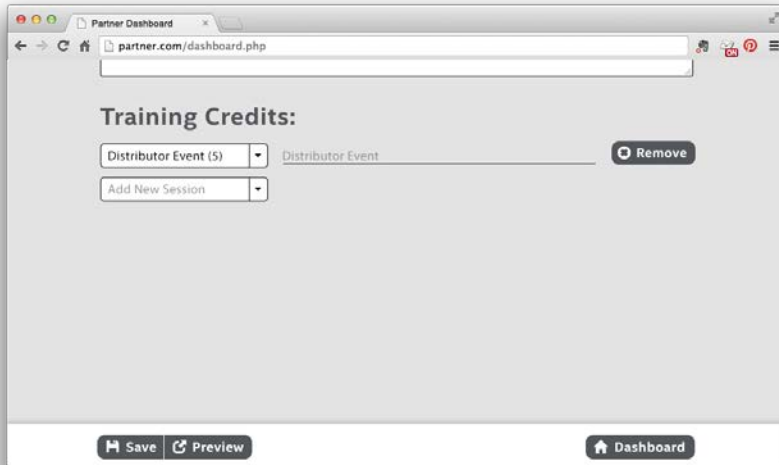
Training Credits

To add a new session to a campaign, a user will first select the session type and the number of credits.



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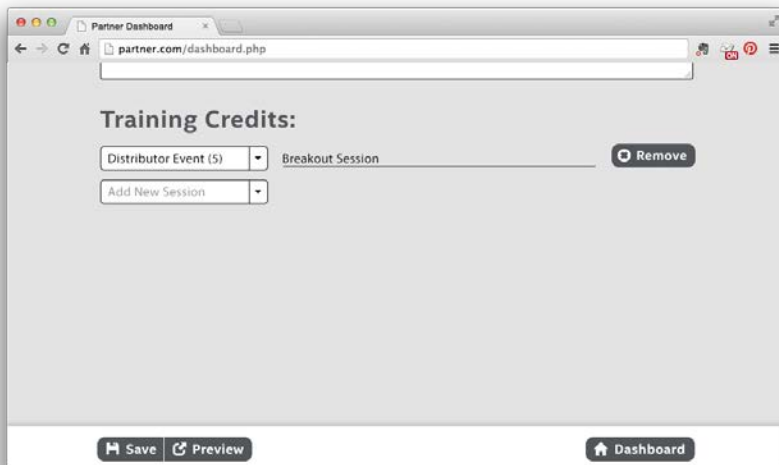
Dashboard (cont.)



Training Credits (cont.)

Once the session type & credit value has been assigned, the user can provide a custom label.

If no custom label is provided, a generic label will be used.



Save / Preview

Once all custom information is provided the admin will have the opportunity to save or preview their campaign.

Preview will allow them to see both the campaign page on the program site as well as the email that will be sent from the application.



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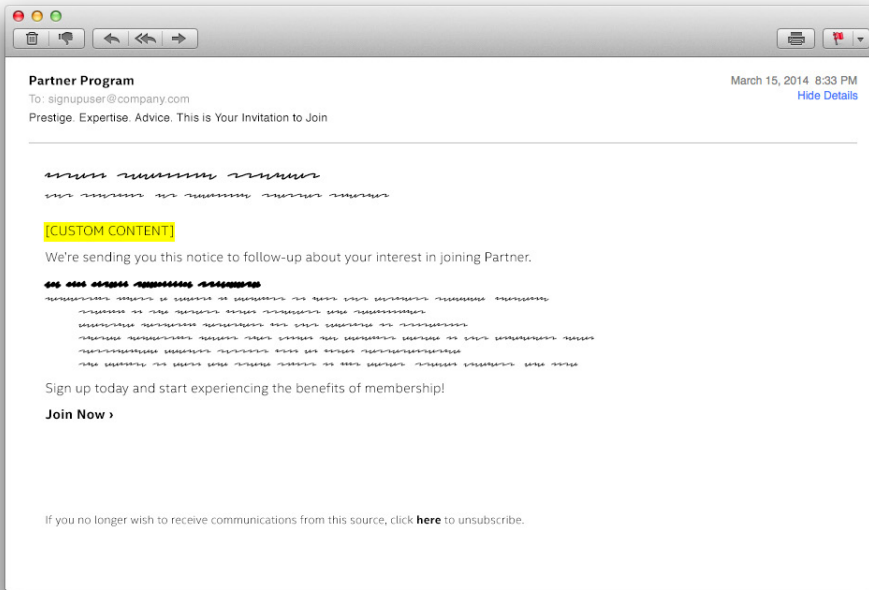
Email

Email - No Training Credits

Users who Sign-Up on the application at participating events will receive an email.

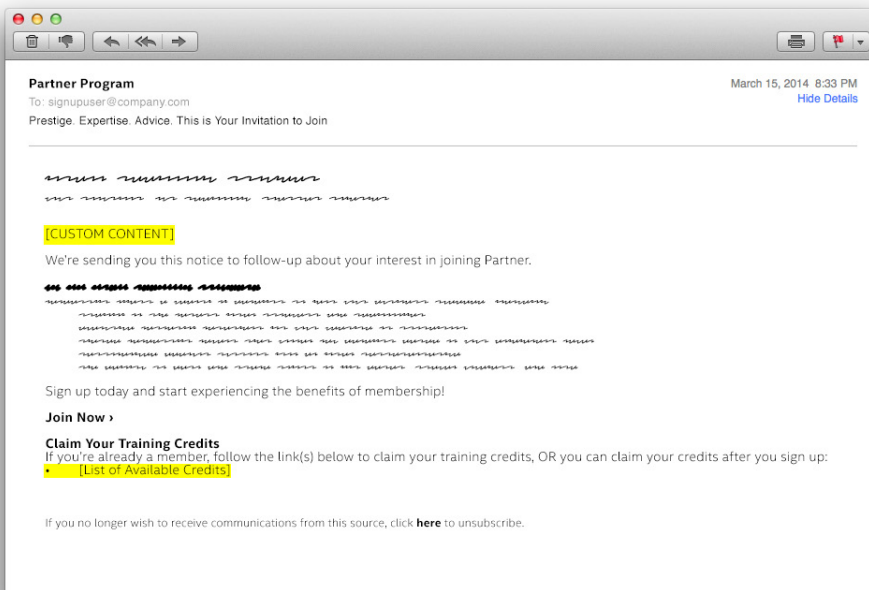
Links in the email will include the provided Campaign ID.

Instead of linking the user to the program site, links from this email will send them directly to relevant content. (Join Today will go to the join application, etc.)



Email - Training Credits

If training credits are available, the email will list available credits which users can click through to claim.



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