How to Combine Campaigns

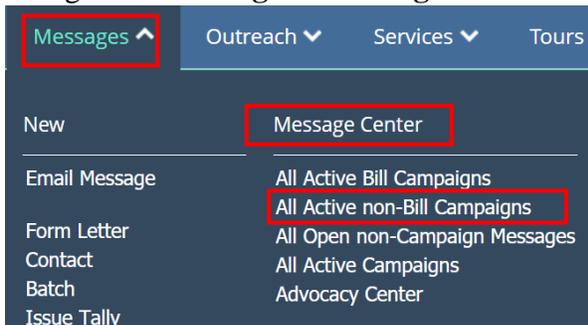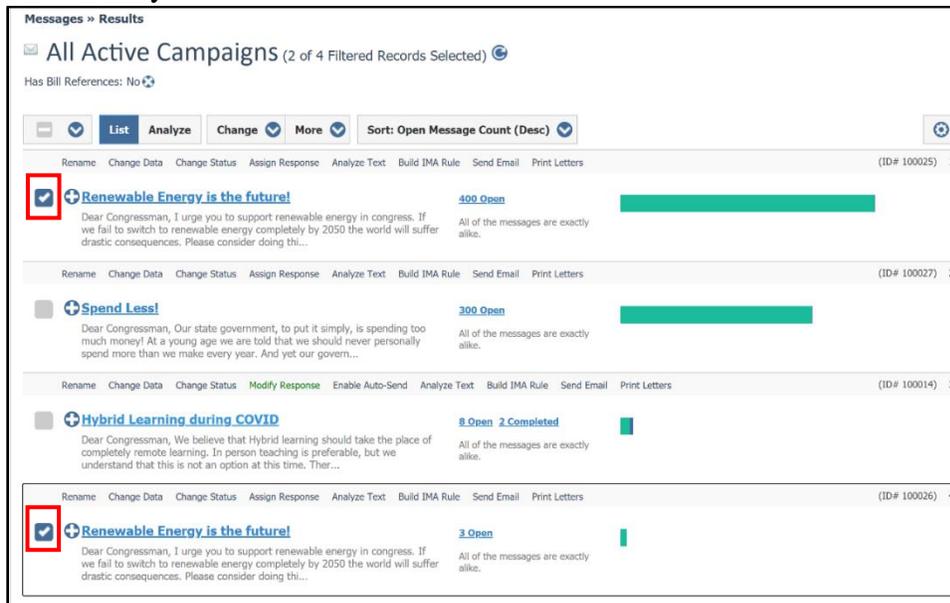| |
|---|
| **Market:** House, Senate |
| **Module:** Messages |
| **Purpose:** This guide provides instruction on how to combine multiple advocacy campaigns in IQ. |
| **Key Benefits** |
| Combining multiple campaigns that are similar in nature reduces the volume of campaigns to manage. Thus, this is a time-saving technique.

IQ can be configured to automatically combine campaigns that share similar text. Contact your Office IQ Consultant to request this configuration. |

1. Navigate to **Messages > Message Center > All Active non-Bill Campaigns.**

2. IQ displays all your office campaigns that are not related to a bill. Click the box next to the campaign names that you want to combine.

3. Select **Change > Combine Campaigns**.

4. Select the campaign into which the other campaigns will combined. A best practice is to select the campaign has the most messages amongst those you are combining.

5. Click **Combine Campaigns.**

The illustration below provides best practices on managing messages from a macro and micro level approach in IQ.

First, manage bill-related messages as this will allow you to also manage all the campaigns associated with a bill. Thus, you are reducing the number of campaign messages (which tend to have the highest volume of message records in IQ) at the same time.

Second, manage campaign messages by combining those that are similar in nature. Thus, you are reducing the number of campaigns to manage and to respond.

Finally, manage individual messages as these are the type of messages that have lower volume of records in IQ.

1 — Bill Related Messages

1. Sort all **Bills** according to how you want to manage them (i.e. most open messages, oldest, newest, etc.).

2. Expand the information of a specific **Bill**.

3. Create a **Form Letter** for each bill position:
   • Supports
   • Opposes
   • Undecided

4. Assign the **Form Letter** according to the bill position. IQ will automatically create an active **Batch** for this bill position.

5. Expand the information of the **Batch**. Once the **Form Letter** for this batch is approved, you can use it to respond to all messages associated with this batch or bill position.

2 — Campaign Messages

1. Modify the Campaign title and description, as needed.

2. Use **Analyze Text** to identify messages in the Campaign that are unique and address them appropriately.

3. Combine *campaigns that are similar in nature.

4. Set the **Response Rules** for the Campaign.

5. Enable **Auto Send** to automate your responses to all the messages in this Campaign using the **Form Letter** that you selected in your **Response Rules**.

*IQ can be configured to automatically combine campaigns that share similar text. Contact the Office IQ Consultant for this configuration.

3 — Individual Messages

1. Use the **Text Filter** to find common information among the messages. A Best Practice is to filter based on **Issue Code** or **Subject**.

2. Assign those filtered messages to an existing **Batch**. Create a new Batch, if needed. When creating a **Batch**, a Best Practice is to assign a **Form Letter** to the **Batch** so you can use the **Form Letter** to respond to all the messages in the batch at all once.

Note: The **Campaign Finder** feature can be used identify individual messages that can be combined into a new campaign. This approach reduces the volume of individual messages and allows the ability to apply campaign rules and responses.

Leidos Proprietary