Channels, Campaigns, and Revenue Forecasting

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Overview

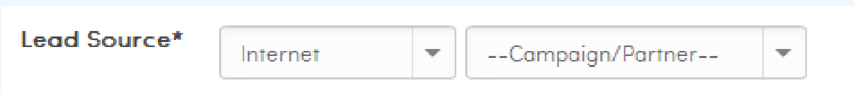
A customer's Lead Source is broken into groups called **Channels**, then subgroups within each channel called **Campaigns**. **Channels** are a marketing term that could be similar to "marketing funnel" or "entrance to the brand." It represents how a customer first learned about your brand or how they first interacted with your business in a way that could eventually lead to a won opportunity/closed sale. Accurately documenting Channels and Campaigns helps you determine how to focus your resources when reaching out to new prospects. As a business owner, you can review the **Revenue by Lead Source report** to determine which lead sources are the most lucrative.

This article will review:

service**minder** provides several generic default options to pick from but you'll probably want to add more to the list. For example, you might get leads from your website, social media, or even a billboard. A channel can be Facebook, a direct mailer, a conference, or Google pay-per-click campaign. Whatever you want it to be to help you track where leads come from.

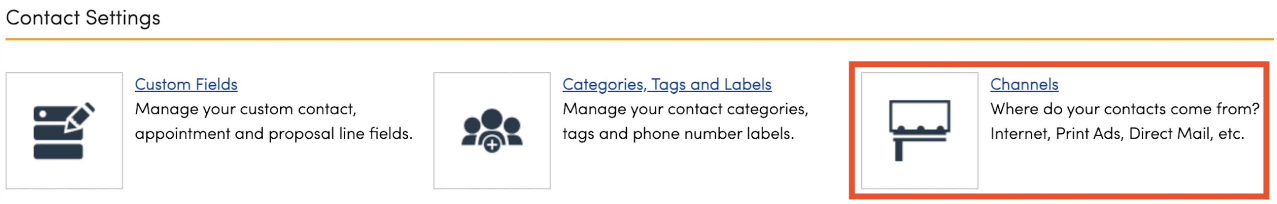
You will want to put some thought into how to best organize your business to grow and expand your marketing channels. If you do advertising in print publications like magazines or other periodicals, then you can create a Channel called Print. Same for Direct Mail.

When you add a contact, you are required to select a **Channel** (the first of the two dropdown menus next to **Lead Source**).



Create a Channel

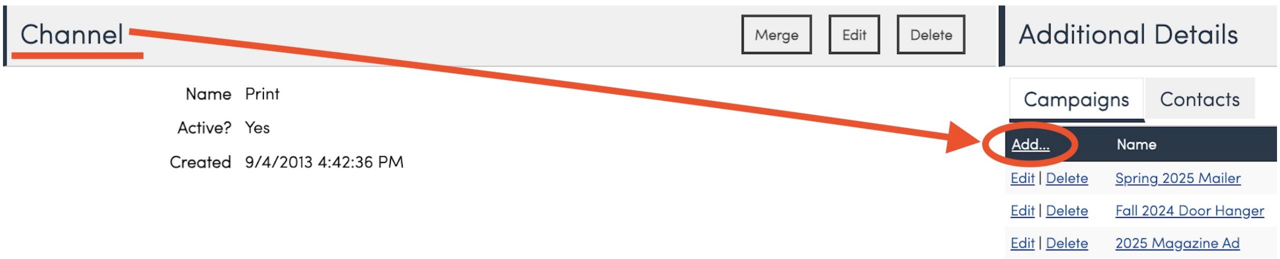
To create new lead source Channels, go to **Control Panel > Contact Settings > Channels** and click **Add** at the top of the grid.



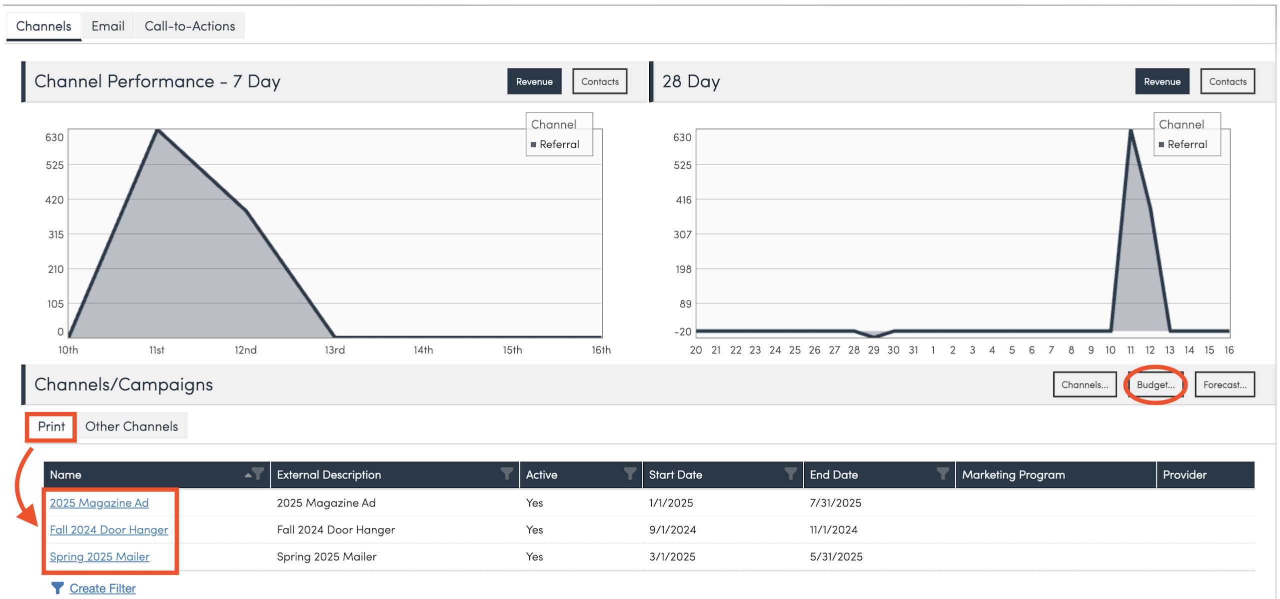
Give the new channel a name that will clearly define how these leads have found your business. Think of the Channel as the larger basket that holds each campaign within it.

Create a Campaign

Within these Channels, you can then create specific **Campaigns** to track exactly where leads came from, such as specific print ads or certain direct mail programs. You may not get enough lead activity from a given Campaign, but by grouping them by Channel, you'll now have a better chance to have enough activity to then compare how different marketing channels perform against each other.



Channels contain Campaigns. Every contact has to have a Channel. A contact *may* also have a campaign within that selected Channel. You can review your campaigns using the **Campaigns** button in the top blue toolbar.

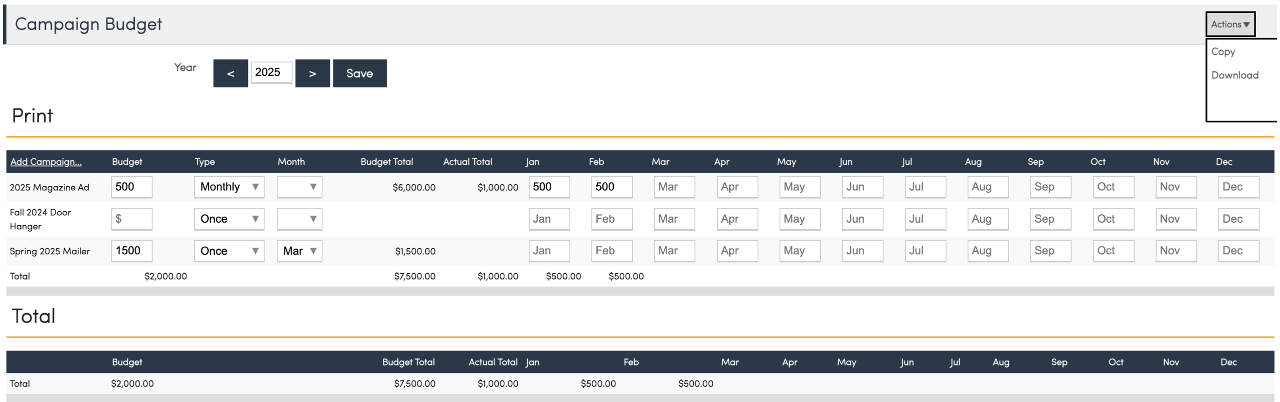


Sometimes a customer will find your business in more than one way. ServiceMinder has the ability to merge duplicates when adding contacts via API key, and when that happens we can also track more than one Channel and/or Campaign for that customer. The details for the newer contact will be stored as "additional interactions."

Campaign Budgets

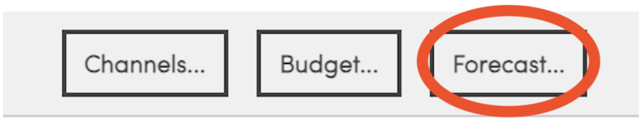
You can also set budgets for your campaigns. Click **Budget** on the right side of the screen under the graphs.

- In the **Budget** column, set the amount you plan to spend for each Campaign that year.
- Set the **Type** to Once, Monthly, Quarterly, or Annually. If Once, set which Month you plan to spend that money.
- The **Budget Total** column will calculate automatically for you.
- The **Actual Total** column will calculate automatically as you fill in the amount you actually spent each month on that campaign in the Month columns.



Revenue Forecasting

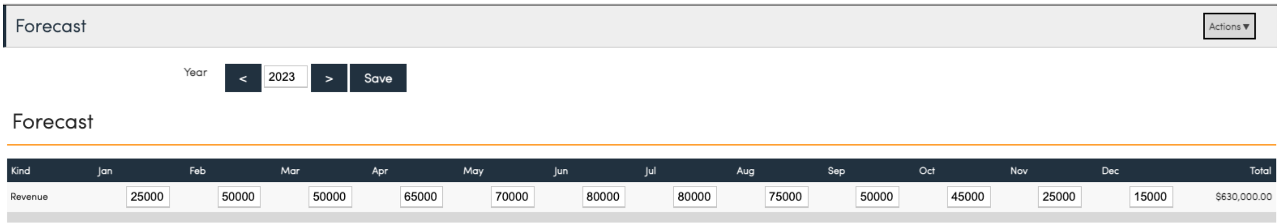
This **Channels & Campaigns** section is where you also input your forecasted monthly Revenue numbers, so your business performance can be tracked according to expected growth.



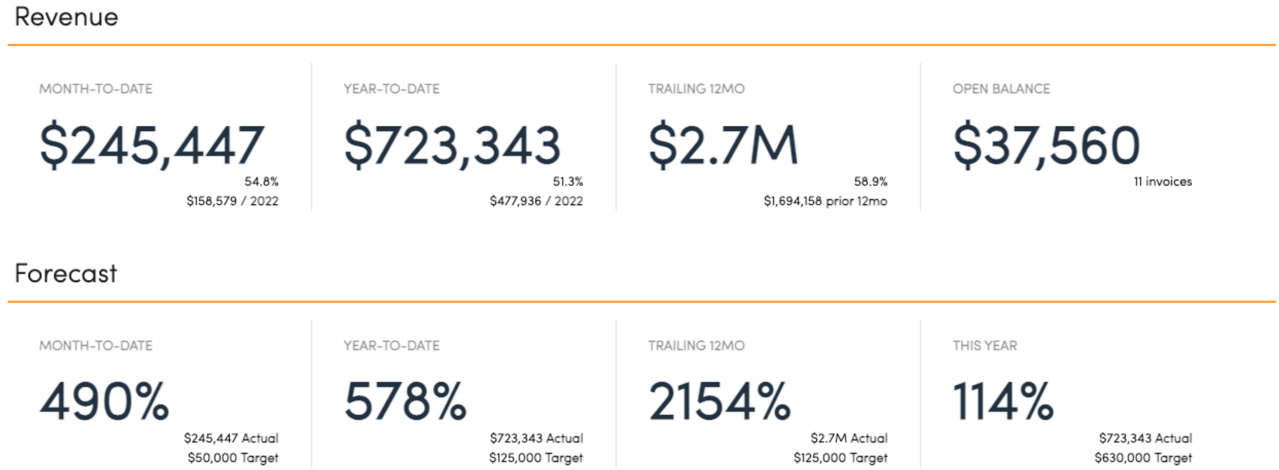
It's critical to know where you want your business to go in order to chart your course to get there. Using sericeminder's revenue forecasting section, a business owner can see where the business is reaching goals or falling short.

Creating your revenue forecast/budget is simple. Once you click the **Forecast** button on the Campaign/Channel main page, you will be directed to a simple monthly dollar-entry page.

Enter your monthly anticipated revenue and save. Now your **Pulse** report will show you your actual vs. forecast revenue.



Using the Pulse snapshot is a great way to check your business vitals!

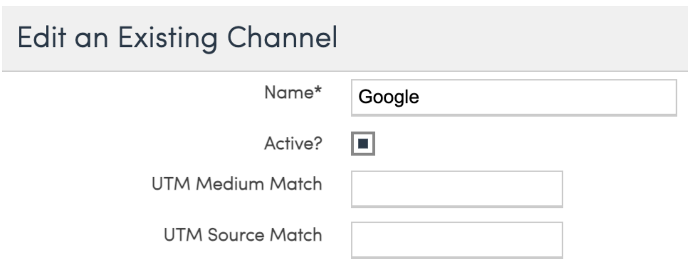


UTM Matching

Many of our integration methods support passing in UTM parameters to make it easier to select the desired campaign.

When adding/editing Channels or Campaigns, you can specify the UTM Match settings for:

- **utm_campaign**
- **utm_source**



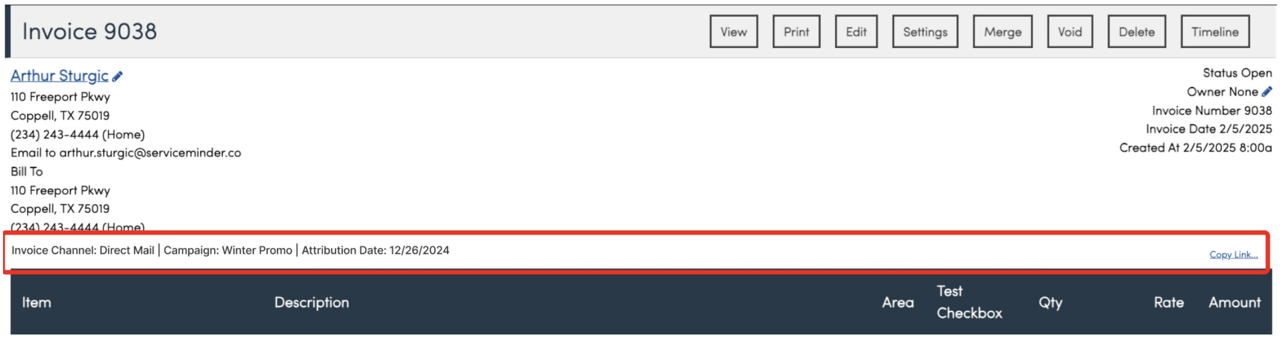
The syntax for UTM parameter matching is a list of substrings separated by commas. If the UTM parameter contains any of the substrings, that will be match. You can also specify a "[" at the beginning of a substring to indicate "starts with" to allow multiple UTM parameters to match a single substring.

If multiple campaigns match, we will automatically select one (non-deterministically).

Reports and Downloads

Lead Source Displayed on Invoices

If a contact has more than one lead source attributed, their most recent Channel and Campaign will be displayed on their invoice for you to view.



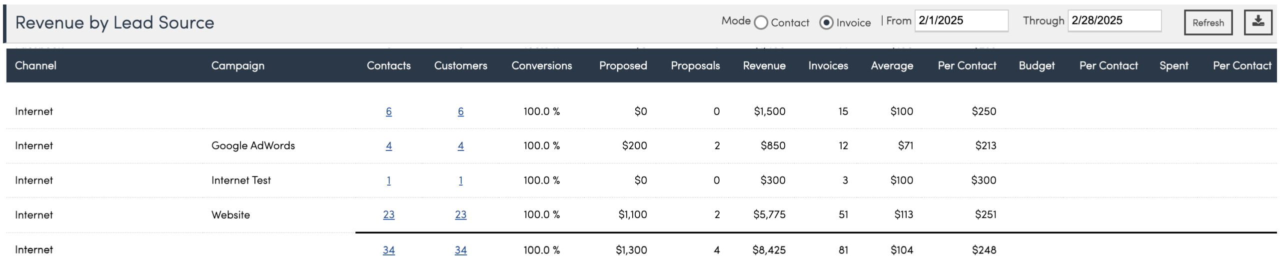
Revenue by Lead Source Report

The **Revenue By Lead Source** report can give you critical insights into which marketing efforts are yielding the best results. You can find this report by clicking **Reports** in the blue menu bar at the top of the screen.

☆ Revenue by Lead Source
Shows revenue by Channel and Campaign.

The **Mode** of the report can be set to either **Contact** or **Invoice**. Modes assist with your idea of when the revenue was generated to make decisions on market efficiency performance. In other words:

- When the mode is **Contact**, it is based on contacts created within that timeframe and based on contact create date.
  - If you've selected a certain date range it will show all revenue from them. For example, if you set the range to June, and any of those contacts also have invoices in July, those will be included.
- When the mode is **Invoice**, we find the invoices created in that date range and based on invoice create date.



Revenue by Lead Source — Mode: Contact / Invoice | From 2/1/2025 Through 2/28/2025 — Refresh

Channel	Campaign	Contacts	Customers	Conversions	Proposed	Proposals	Revenue	Invoices	Average	Per Contact	Budget	Per Contact	Spent	Per Contact
Internet		6	6	100.0 %	$0	0	$1,500	15	$100	$250				
Internet	Google AdWords	4	4	100.0 %	$200	2	$850	12	$71	$213				
Internet	Internet Test	1	1	100.0 %	$0	0	$300	3	$100	$300				
Internet	Website	23	23	100.0 %	$1,100	2	$5,775	51	$113	$251				
Internet		34	34	100.0 %	$1,300	4	$8,425	81	$104	$248				

Column	Description
Contacts	Number of Contacts present within the Channel/Campaign and which result via the report options.
Customers	Number of Contacts that are categorized as customers.
Conversions	Percentage of Contacts that are Customers.
Proposed	Total balance proposed.
Proposals	Number of Proposals created.
Revenue	Total balance invoiced.
Invoices	Number of Invoices created.
Average	Average revenue per Invoice.

Column	Description
Per Contact	Average revenue per Contact.
Budget	Total budget for Channel/Campaign.
Per Contact	Average budget per Contact.
Spent	Total expenditures for Channel/Campaign.
Per Contact	Average expenditures per Contact.

Brand Level Downloads

Channel and Campaign information will also be included as columns in the organization and brand level Invoices download. The organization download can be found via the **Reports** button in the top blue navigation bar, then clicking the **Downloads** tab. The brand level download can be accessed via **Dashboard > Downloads > Invoices**.

	1	2	3	4	5	6
	Contact Channel	Contact Campaign	Contact Channel Attribution Date	Invoice Channel	Invoice Campaign	Invoice Channel Attribution Date
	Internet	Google AdWords	12/04/2024	Internet	Website	1/1/2025
ile)	Direct Mail 1	New Homeowner	12/17/2024	Referral	Existing Customer	1/1/2025

FAQs

Can we auto assign a tag if we know the source is from a specific channel or marketing campaign?

There are three options, and possibly three triggers that may need to be set up to cover a variety of scenarios. We will use Facebook as an example.

- When a contact is manually added and the "Channel" is indicated as "Facebook" when the contact is created.
- When a contact is added via the API and the "Channel" is indicated as "Facebook" – this one may not be needed unless the API can also assign the Channel. If not, the contact would need to be edited which would trigger #3 below.
- When the Contact is updated and the "Channel" is indicated as "Facebook".How do I hide the Channels that aren't in use?

When a channel is marked inactive, it no longer shows in the drop down for **Lead Source**.

How do I see if old Channels are still in use?

"In use" (meaning they are tied to a contact). In **Control Panel > Channel**, if you click on the name of the Channel, it takes you to the detail page. On that page it shows you which contacts are assigned to that channel. If the contacts are reassigned then you can delete the channel.

What happens to the contacts who have the old channels selected? What is best practice in this scenario?

The best way to handle this is to create the new channels/campaigns, move the contacts over into the right channel/campaign, and then the old ones can be deleted or made inactive. Another option is to merge channels or campaigns together, which will also help reassign the contacts.