HOW-TO GUIDE - CAMPAIGNS

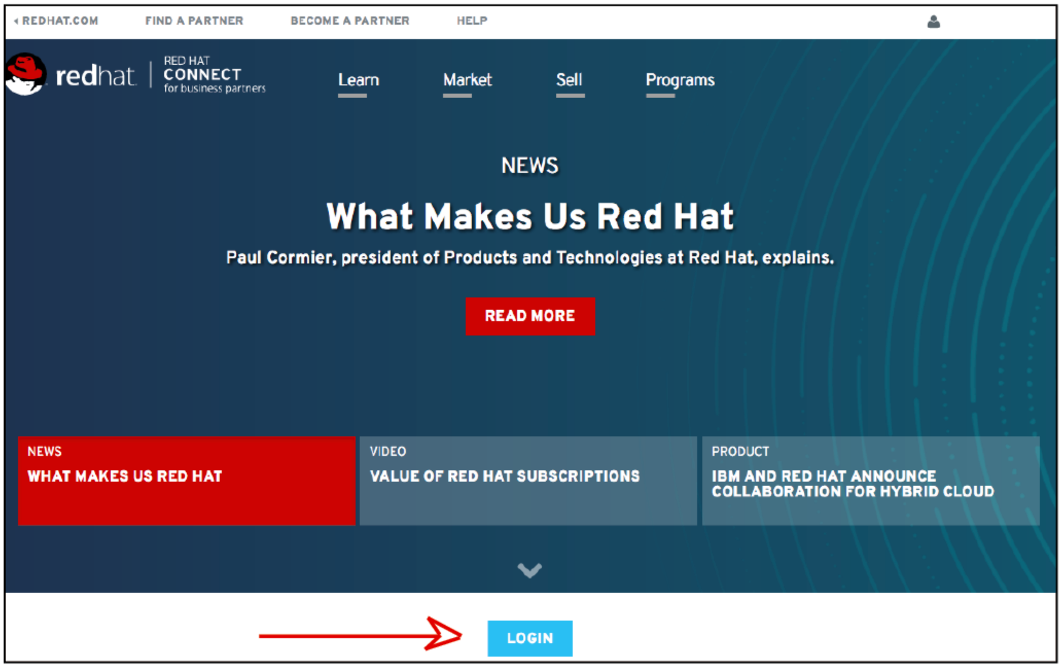
RED HAT PARTNER MARKETING CENTER

Red Hat Partner Marketing Center is a one-stop marketing platform available to Red Hat partners via the Red Hat Connect for Business Partners Portal. Partner Marketing Center will give you access to ready-to-go campaigns designed to help you increase leads and sales. This guide serves as a reference tool as well as resource to help partners get started using the various functionalities of this self-service tool. For best success, follow the steps in this guide in order.

To watch a video demo of how to customize and launch a campaign, visit: https://youtu.be/YM8yzCoQgOQ.

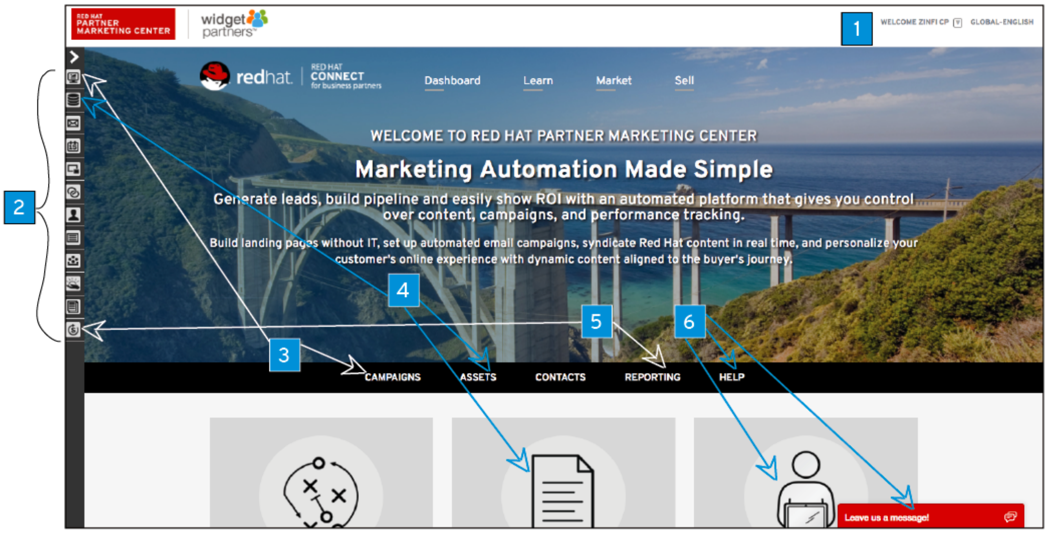
TABLE OF CONTENTS

I. Access Red Hat Partner Marketing Center



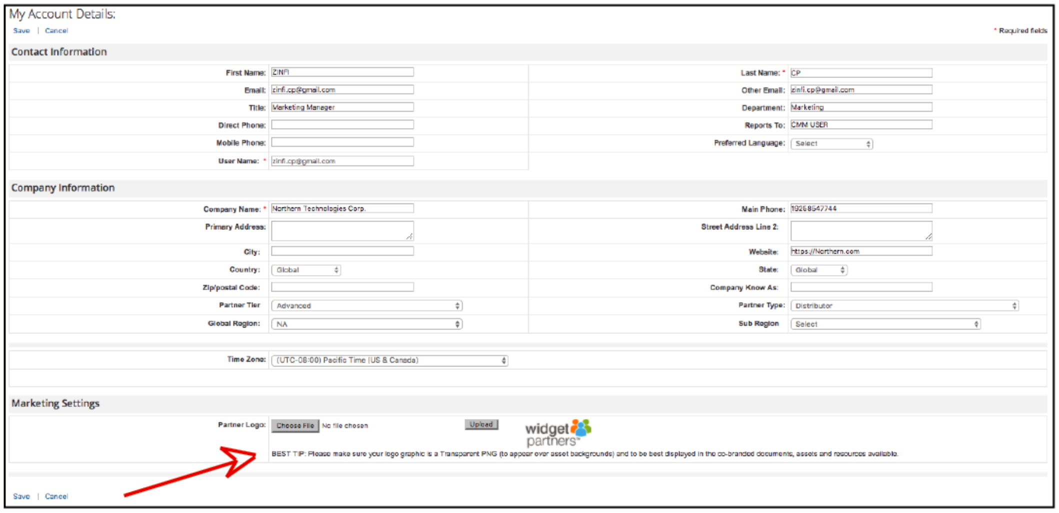
- Access the Red Hat Partner Marketing Center from within the Red Hat Connect for Business Partners Portal, https://partnercenter.force.com/s/Homepage.
- Click the blue “LOGIN” button in the lower center of the page and login with your usual Red Hat Connect Portal credentials.
- Click “Market” in the upper menu, then select “Red Hat Partner Marketing Center” from the dropdown. This will direct you to the Red Hat Partner Marketing Center homepage.

II. Tour of Homepage



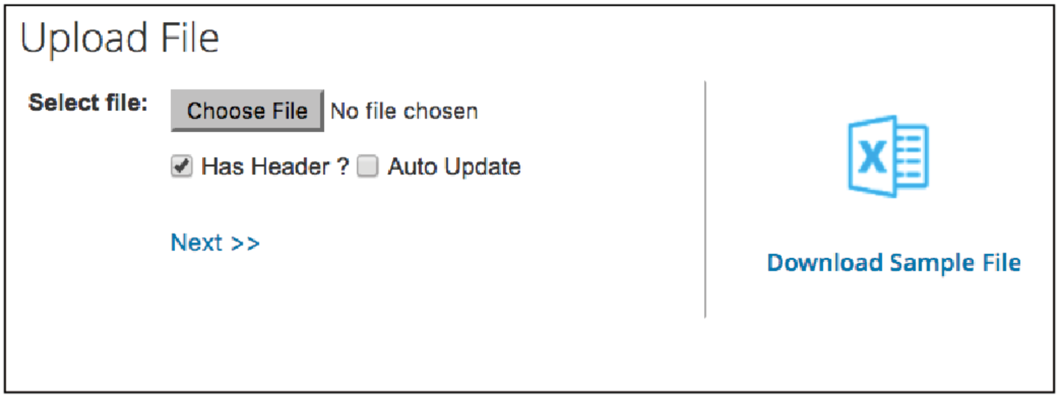
1. Your **account information** and **region language**.
2. The areas you'll visit most frequently are placed in the center of the page, but you can also access them from the collapsible "modules" navigation on the left of the screen. This includes:
   a. Emails: Your emails that you've previously sent. Resend them or preview them. Basically, access individual emails here instead of having to go back into the campaign and re-run them.
   b. Microsites (or landing pages): Same as for emails, above.
   c. Prospects: People you'll be sending campaigns to.
3. **Campaigns:** "Where you generate pipeline velocity." We will look at the smart campaign flow methodology available in these campaigns in this demo.
4. **Assets:** Co-brandable, print-quality, high resolution materials you can use in the Portal or download them and use them in conjunction with your other marketing efforts.
5. **Reporting:** Get access to 100s of default reports. Measure key metrics to show what's working and what's not so you can quickly make changes to your strategy. You can even make your own custom reports.
6. **Help:** Takes you to an FAQ with tutorials in order to address any platform questions you may have. Still need more help? Click on the red chat box in the bottom right corner and fill out your information to be connected with a Zinfi support representative via chat, email, or telephone.

III. Co-brand Your Account



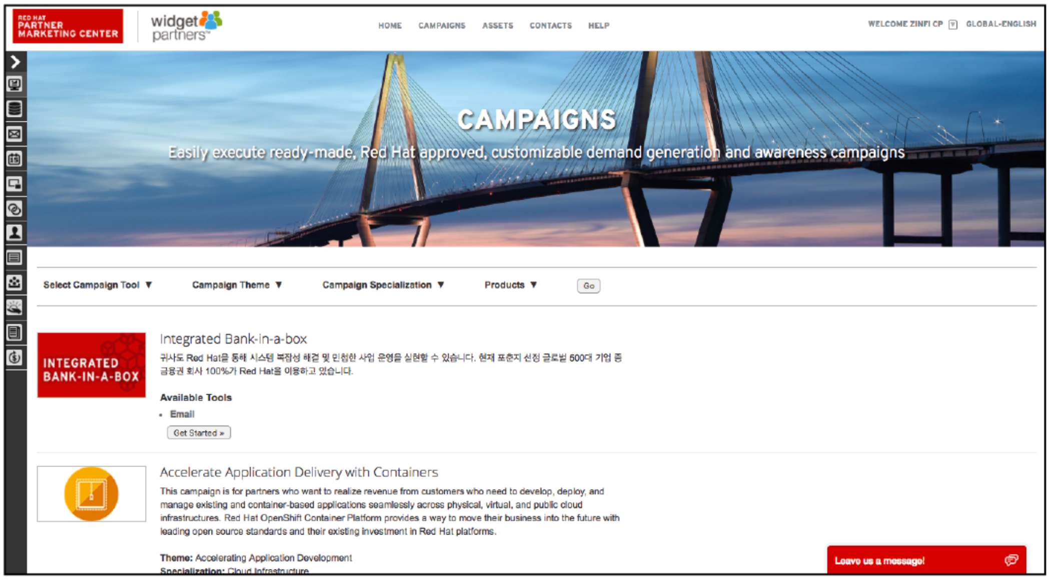
- Setting up co-branding for your account should be your first action item in Partner Marketing Center. Click the arrow by your name in the top right, and go to “My Account” which has been auto-populated with your information from your Red Hat Partner account. You should now see the “My Account Details” page. Click “Edit” above your contact information, and you will see a new category, “Market Settings,” where you can upload your logo file. You only need to do this one time. Save and return to the homepage.

IV. Upload Prospects



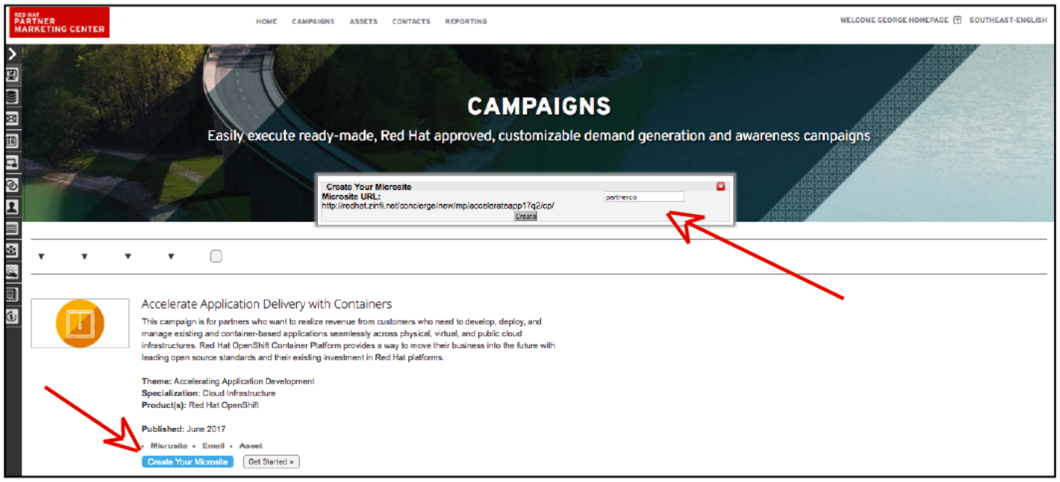
- ***Add your prospects to the tool before beginning to customize and send a campaign.***
  This will streamline and simplify the campaign building process.
- Click “Upload a List” in the Prospects module in the left-side menu. Click the icon to upload a list.
- **Download Sample**: This serves as a guide for the 5 mandatory fields you need to have in the list you upload. Those 5 are highlighted in red (email, first name, last name, company name, and country). You can have as many fields as you want in addition to those 5.
- Choose and upload a list and follow prompts, “Next.”
- You will see a page where you map the fields from your list to make sure they match and are uploaded correctly into the tool. Click “Next” to confirm the mapping and enter a title for the list. Be descriptive so you can easily find it.
- Your prospects are now uploaded. The “View Prospects” section of the Prospects module displays them similar to the way a CRM would. You can explore further by clicking the name of each prospect to view a campaign history to see their activity.

V. Select a Campaign



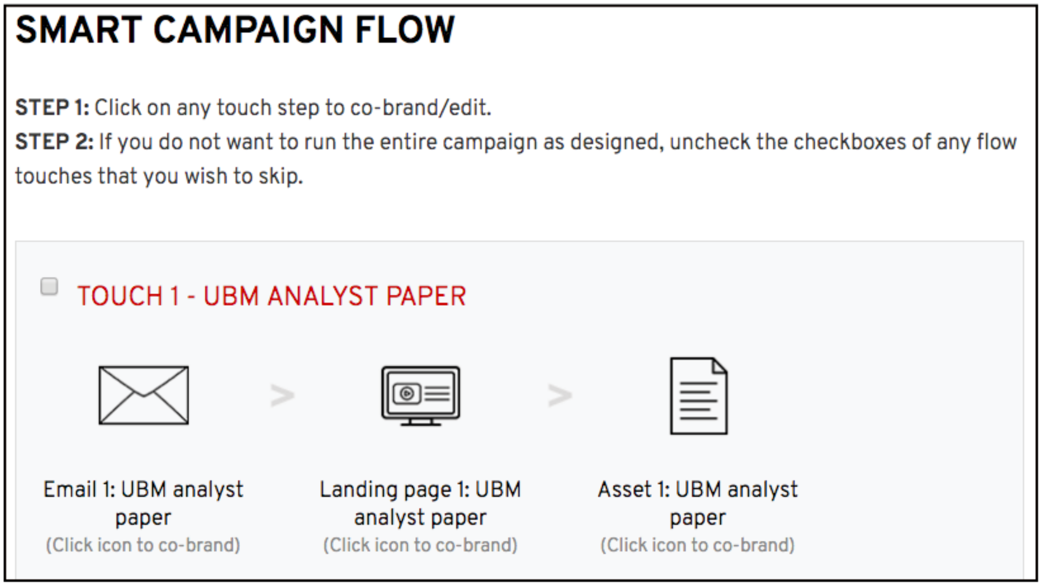
- Click “Campaigns” in the black banner in the middle of the homepage (or from the top of the expandable menu of modules on the left) to view your available email campaign templates. Use the filter options to see specific types of campaigns.

VI. Create Your Microsite Landing Page



- The first step in customizing a campaign is to set up the microsite for the campaign you've chosen to work on. Click the blue "Create Your Microsite" button to create your personalized version of the campaign microsite (or landing page).
- In the pop-up window, create a unique link to your version of the microsite by entering simple identifying text to define your individual URL. Click "Request Microsite" to finish. Notice the microsite button for that campaign has been replaced in grey with "Your Microsite Created."
- Follow these steps to create microsites for any campaign you plan to launch. This step must be completed before proceeding to customize a campaign.

VII. Customize Campaign



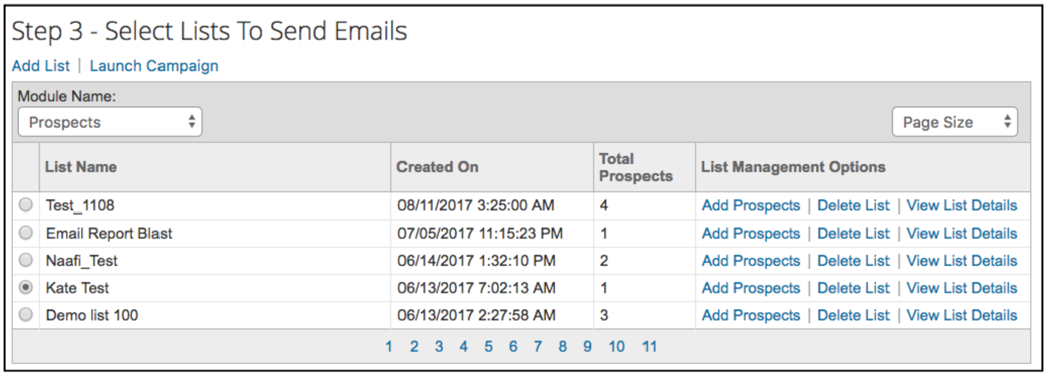
- Click the "Get Started" button on a campaign with a completed microsite. From here you can read through a detailed description of the campaign: it's target audience, why it is relevant, and resources included. Click "Proceed to Smart Campaign Flow" when ready.
- From the Smart Campaign Flow (at the bottom of the page), review the sections or "touches" in the campaign flow. Co-brand the touches of your choice by clicking the icons in each touch.
- You can select only the touches you wish to send. If you select multiple touches, they will deploy in a scheduled cadence - every 14 days. Touches generally have an email, a landing page, and an asset, and most of these can be customized.

- Select a touch and go through and customize each icon:
  - <u>Step 1. Customize Email</u>
    - Click the email icon to customize: the email's title, subject line, and the sender name and email address (who you want the email to appear to have been sent from).
    - Your partner logo and company information will be auto-populated.
    - Check the body of the email for opportunities to input custom text, which will appear between <<angle brackets >>. Click directly into the textbox to replace or delete the placeholder text with your own. Use the WYSIWYG to add URLs or place images. The footer is auto-populated, but you can also edit company information there if you choose.
    - Save the customized email template and return to the Smart Campaign Flow to continue, or save it as a draft to return to it later.

- <u>Step 2. Customize Microsite Landing Page</u>
  - Back in the Smart Campaign Flow, co-brand the next step in the touch by clicking on the landing page/microsite icon.
  - You will see the microsite you previously created with your partner logo and company information auto-populated where applicable.
  - Check the body of the microsite landing page for opportunities to enter custom text.
  - Click “Save & Close” to return to the Smart Campaign Flow.
- <u>Step 3. Asset</u>
  - Back in the Smart Campaign Flow, the final step in the campaign touch is the asset (PDF download). There are two types of assets: static and co-brandable. Click the asset icon to continue.
  - If you find a static asset (no editable fields), simply click “Save” and exit back to the Smart Campaign Flow.
  - If you find a co-brandable asset, use the tools on the right side of the page to input logos and custom text.
  - Click “Save.” You can download it to preview your changes. Click “Return to Smart Campaign” to complete customization for the entire campaign touch.

- Repeat Steps 1-3 for all touches you wish to include in your campaign launch.
- Once you have co-branded all steps in all of the touches you wish to send, check the boxes next to those touches to include them in your campaign launch. Unchecked steps will be excluded from the launch.
- Select the prospect list you uploaded earlier. You can add a prospect to the list at this point if you need to, or view the contents of the list. Or you can add a new list altogether. Click “Proceed to Launch” after reviewing your selections.
- **The first time you go through a campaign, the process is a bit more involved as you’re editing emails and assets which you save with specific titles. Later you can go back and quickly access those from the module navigation.**

VIII. Launch Your Campaign



- <u>Select Mailing List</u> - You will see the a library of available mailing lists. Scroll through and select the list to which you want to send your campaign.
    - If you added your list at the beginning like we did in this guide, you should be able to find it in this library. You can also view the details of these lists or add prospects to them.
    - If you still need to create a mailing list, you can do that by clicking “Add List.” This will take you to a page where you can select recipients from your prospects. Give this new list a name and click “Save.” Once back on the mailing lists library, select the list you just created and click “Add Prospects” to select prospects to include in your new list.
- ***This is your last chance to review your campaign and make edits to it.***
- When you’re certain you’re ready to send the campaign to your mailing list, click “Launch Campaign” to activate and send your customized email campaign.