
Marketing with Shortcuts 7.2/7.3

(for Word 2007)

Why Send Marketing Letters?

Do you find yourself just opening the door to your business each week and crossing your fingers, hoping that you're going to make a profit? A lot of businesses in Australia are doing just this. Well, if you can spare approx. 3-4 hours a month then we can show you just how easy it is for you can take control of your business and make more money.

Promote your business to your existing clients via marketing letters!

Many businesses get bogged down with trying to get new clients through newspaper and magazine ads or letter drops promoting discounts. Yet the most effective way to promote your business is through the clients you already have. The most time and cost effective way to do this is via marketing letters.

There are many letters that you can send to your clients to help promote your business. However, we have setup the four most powerful standard letters (along with a number of other useful letters) considered essential, they are:

- 1) **Referral Letter (weekly)**
This is when an existing client refers a friend or relative to your business. The letter will thank the client for the referral and enclose a voucher that they can use on their next visit.
- 2) **New Client Letter (weekly)**
You can potentially win or lose a client on their 1st visit. So why not increase your chance of getting that client to return to your business? The New Client Letter is designed to do just this. The letter will invite the client to call on the business if they have any concerns. In addition, if you are running a Points Incentive Club, it will detail the amount of points they have so far, and you may even enclose a voucher they can use on their next visit.
- 3) **Non Returning Letter (monthly)**
This letter is a great way to get those clients back in who have drifted away. You will be surprised as to how well this can work. It's also a good way of maintaining your database by making inactive those clients who might never come back.
- 4) **Birthday Letter (monthly)**
The most powerful part of sending this letter is that the client gets it on their Birthday, with the exceptions of Saturdays & Sundays. All you need to do is merge the client's birth date where the stamp goes. All you have to do is put a stamp over the birth date and send them out with mail each day.

Once these standard letters have been edited to suit your needs, it's simply a matter of a few clicks on the screen each week, and out they go!

How to Mail Merge a Document

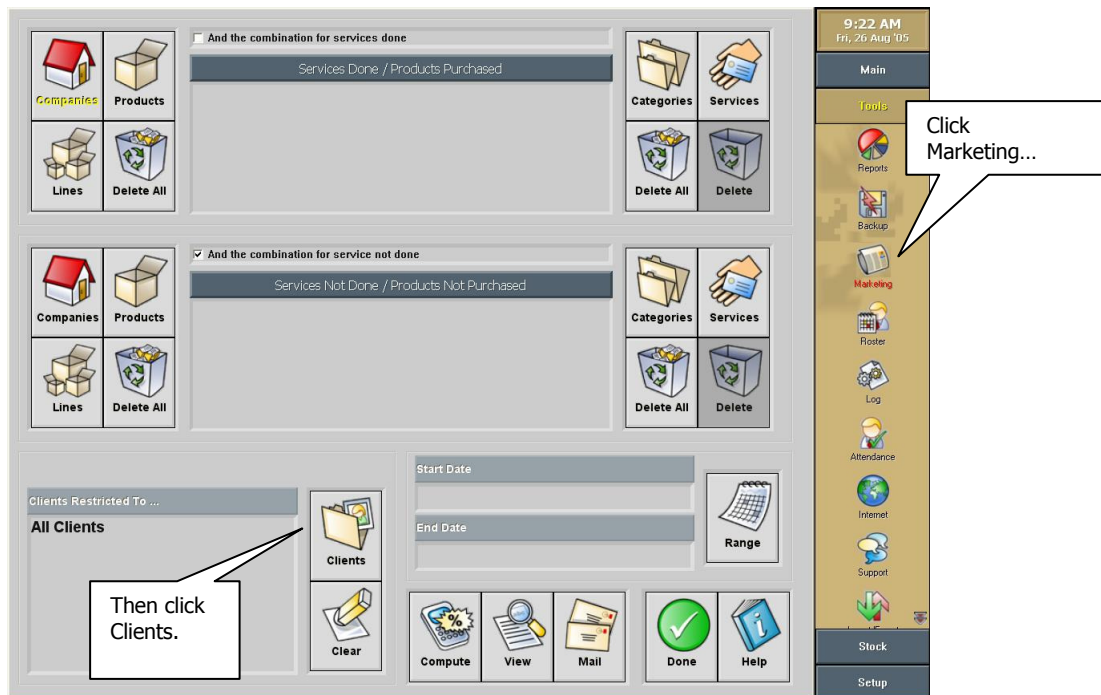
This document will guide you through the process of mail merging a Word document with data from Shortcuts.

Tools Menu (Navigation Bar) → Marketing Icon

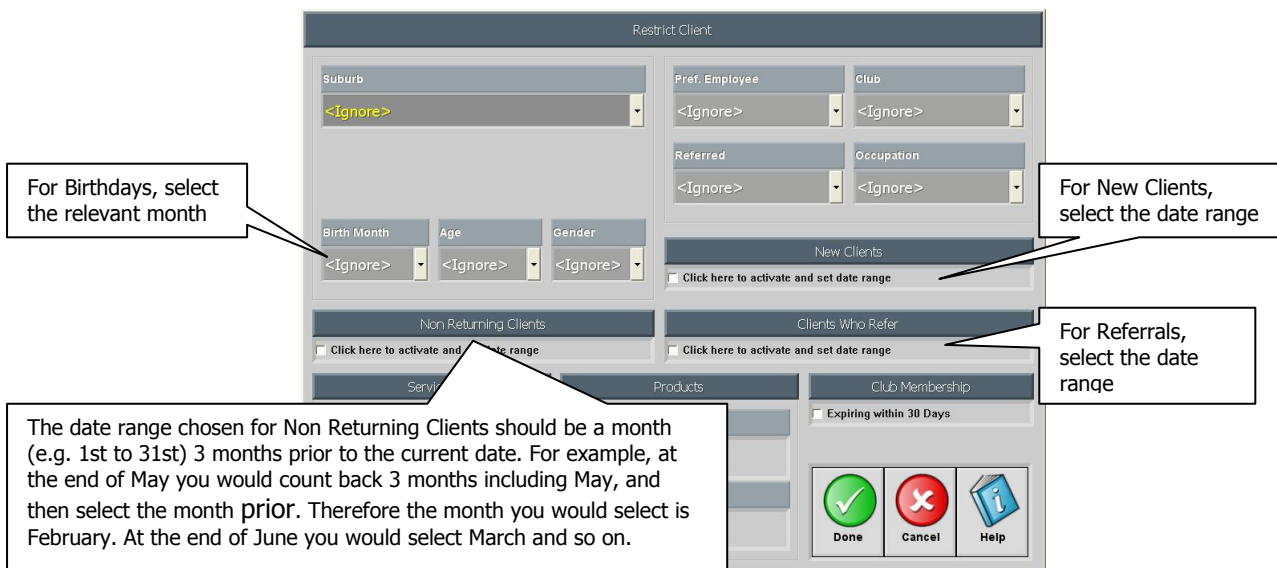


For more information on Marketing Searches, please refer to your Shortcuts User Guide.

1. Open the Marketing screen by clicking on the **Tools** Menu (located on the Navigation Bar), and then clicking the **Marketing** Icon.



2. In the Marketing screen, click on the **Clients** button. The Restrict Clients window will appear.

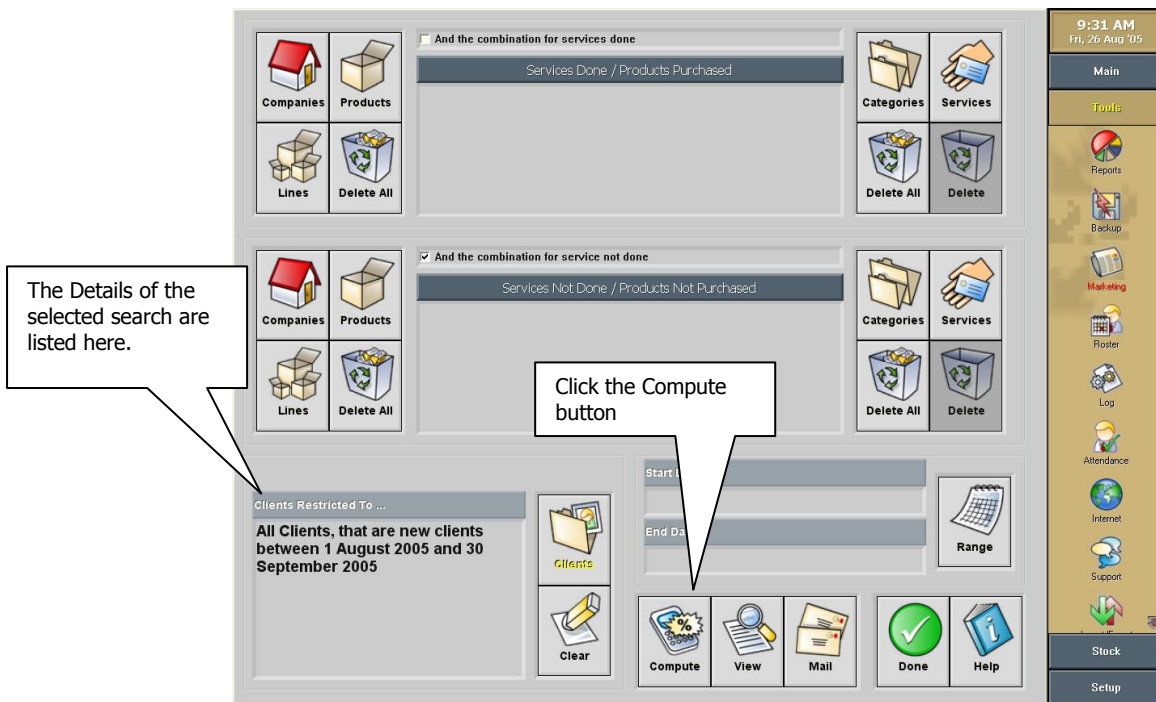


3. Make the relevant criteria selections appropriate to your letter, then click the **Done** button.

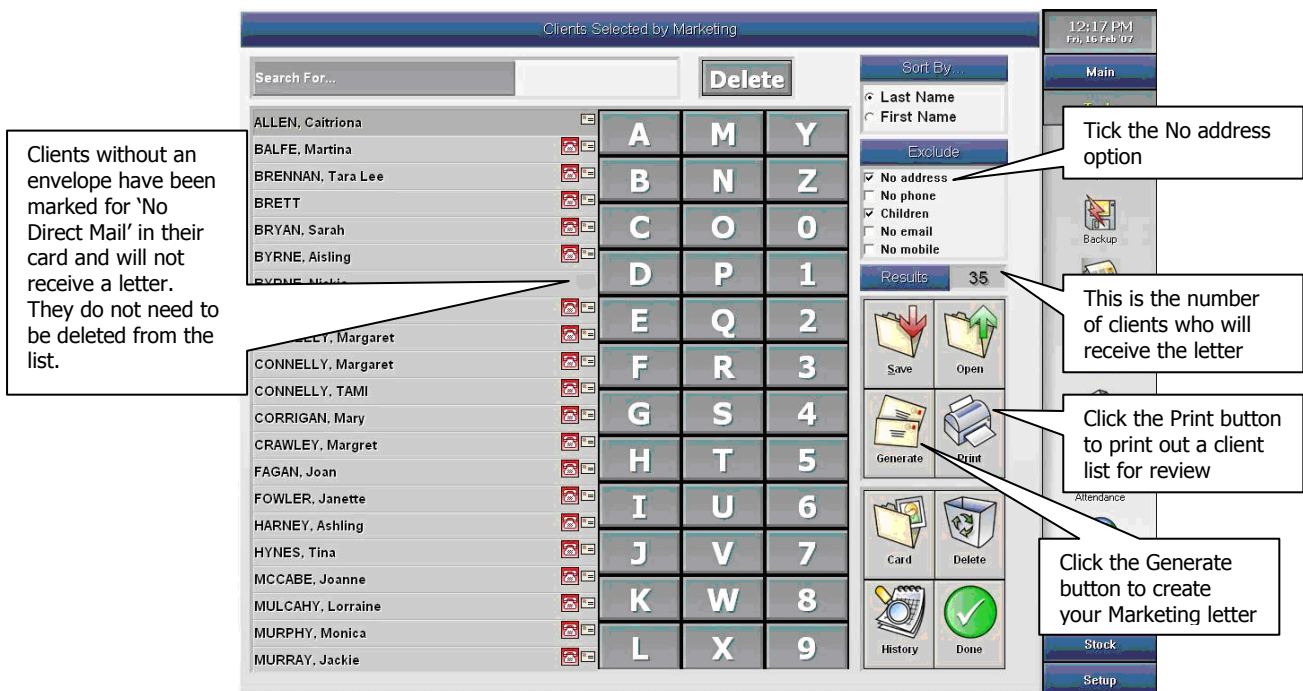


Referral & New Client Letters should be done weekly. Birthday & Non Returning Clients should be done monthly (at the end of each month).

- Once you have defined which particular clients you want to target, the next step is to generate a list of these Clients. Click on the **Compute** button to have Shortcuts generate a list of Clients based on the marketing options and date range specified. Depending on the size of your database, this may take a few moments.



- Once the search is finished, the Clients Selected by Marketing screen will appear, displaying this defined group of clients. These can be sorted by either First or Last Name using the Sort By tick boxes in the top right corner. The Results field will display the total number of Clients that matched the search.



- Tick the **No address** exclusion option to remove any clients which do not have addresses from this list. If you want to remove clients who are marked as being children from this list, tick the Children exclusion option as well.
- Click the **Print** button to print out a list of these clients for review.

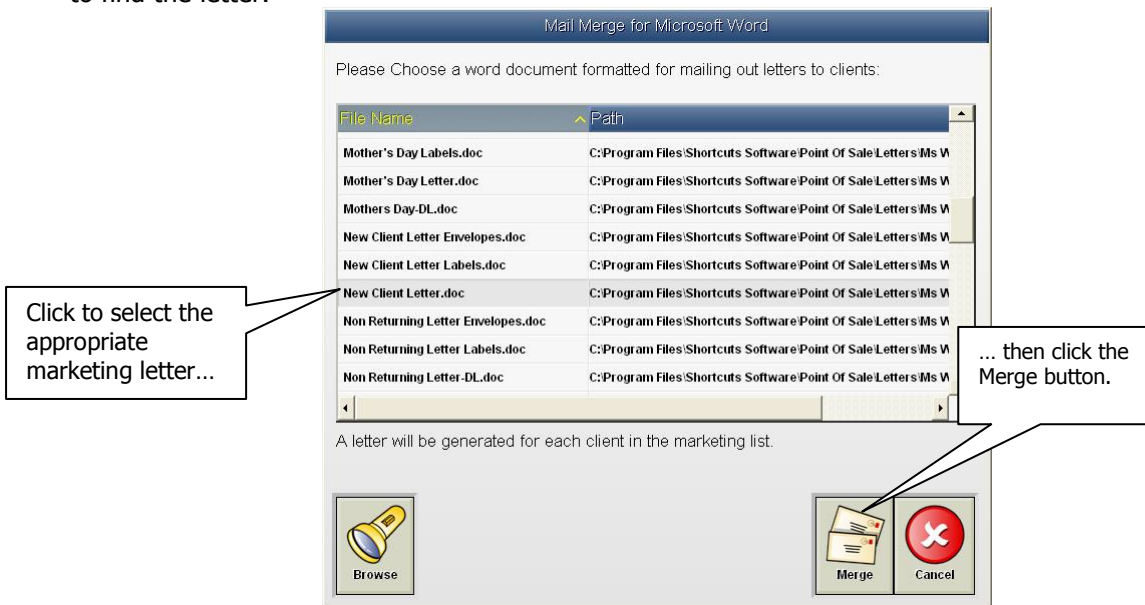


It is important to file this printout and write the date and type of letter on it (e.g. Non Returning Clients for Feb 2001). This will serve as a record of the last date the report was sent.

- Click the **Generate** button. The Marketing List window will appear.

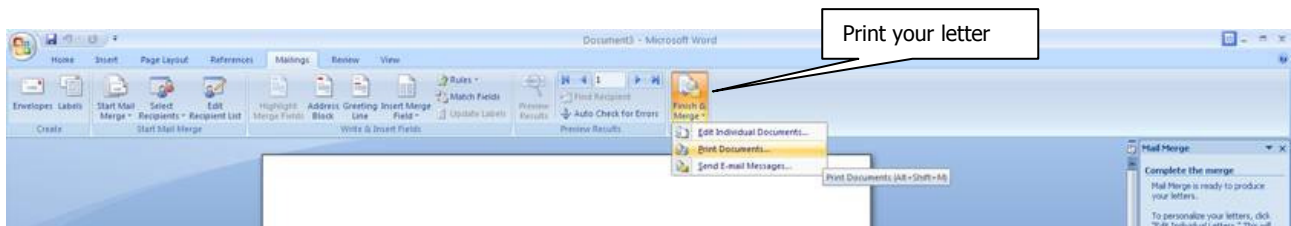


9. Click to select the Direct Mail marketing option.
10. Shortcuts will save your client list in preparation for the mail merge. A progress bar will display the progress on screen. Once the client list is ready, the Mail Merge for Microsoft Word window will appear.
11. Click to select the appropriate Marketing letter from the list. You may need to scroll up or down the list to find the letter.

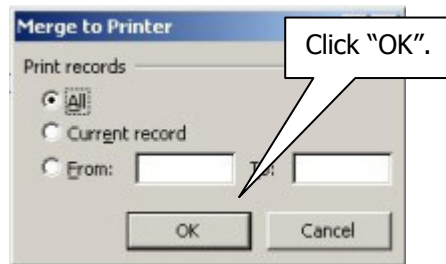


You can use the Browse button to search for any custom Marketing letters you have created.

12. Click the **Merge** button. Shortcuts will merge your client data with the Marketing letter. Please be patient as this process may take a few minutes depending on the size of your client list.
13. Once the merging is complete, the merged letter(s) will appear on the screen. Click on the **Print & Merge** button and select the **Print Documents** option. The **Merge to Printer** window will appear.



14. Select the appropriate option, then click **OK** to continue. Print your letters as normal.



IMPORTANT! Do not save your documents after you have printed them.

15. Repeat Steps 8 – 14 to open and print any other associated documents (e.g. relevant envelopes or labels etc.)



NOTE: Envelopes are setup as DL standard size; Labels are setup as Avery L7163.

16. You have finished creating your mail merged letters!