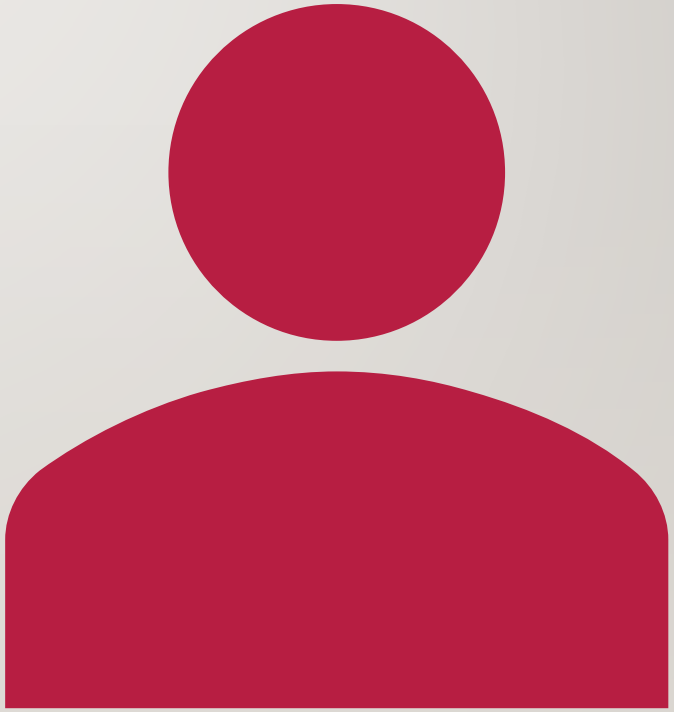
TANIA BAILEY

Marketing Automation Administrator and Strategist

- Email examples
- Forms + Processing
- Landing Pages
- Segmentation

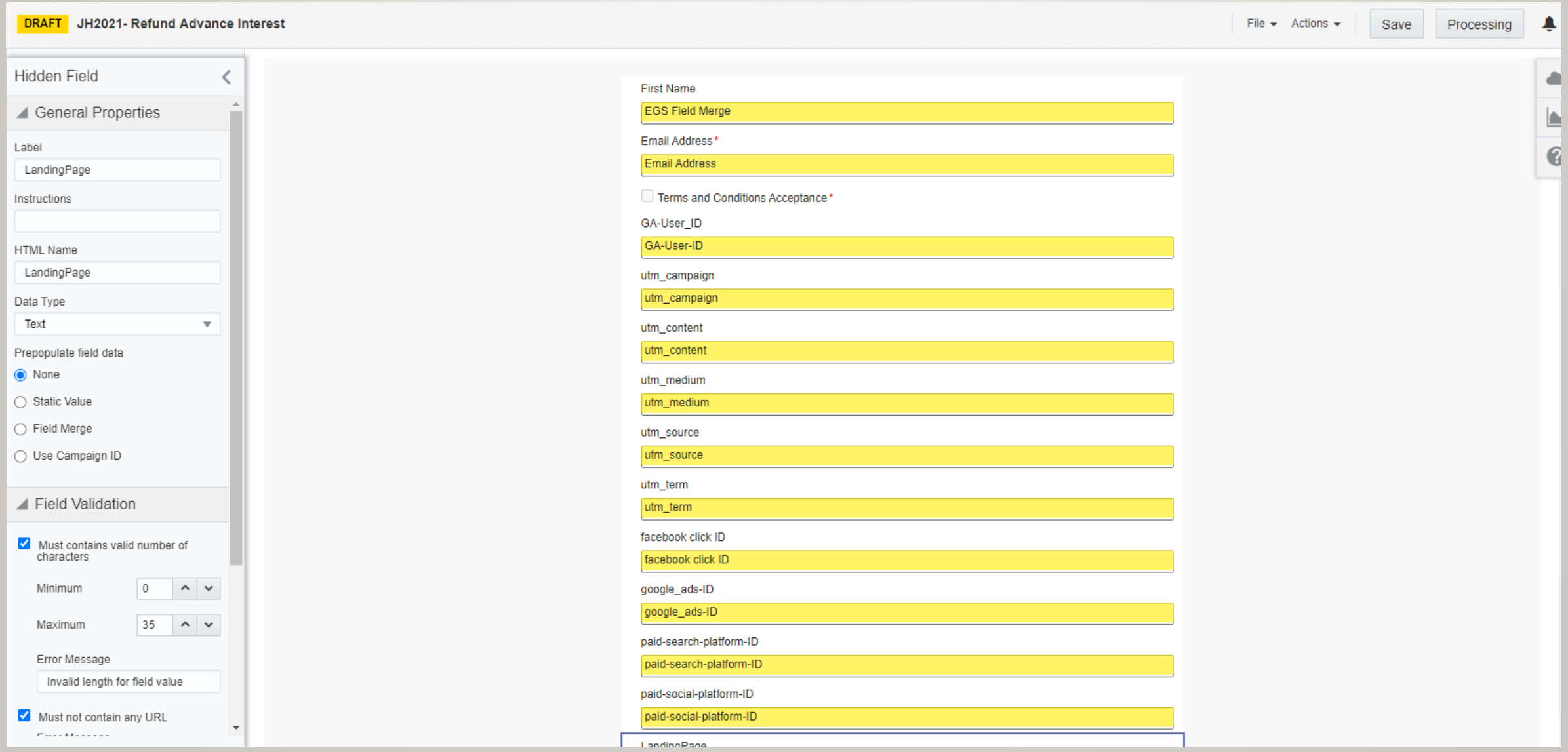


REFUND ADVANCE LOAN

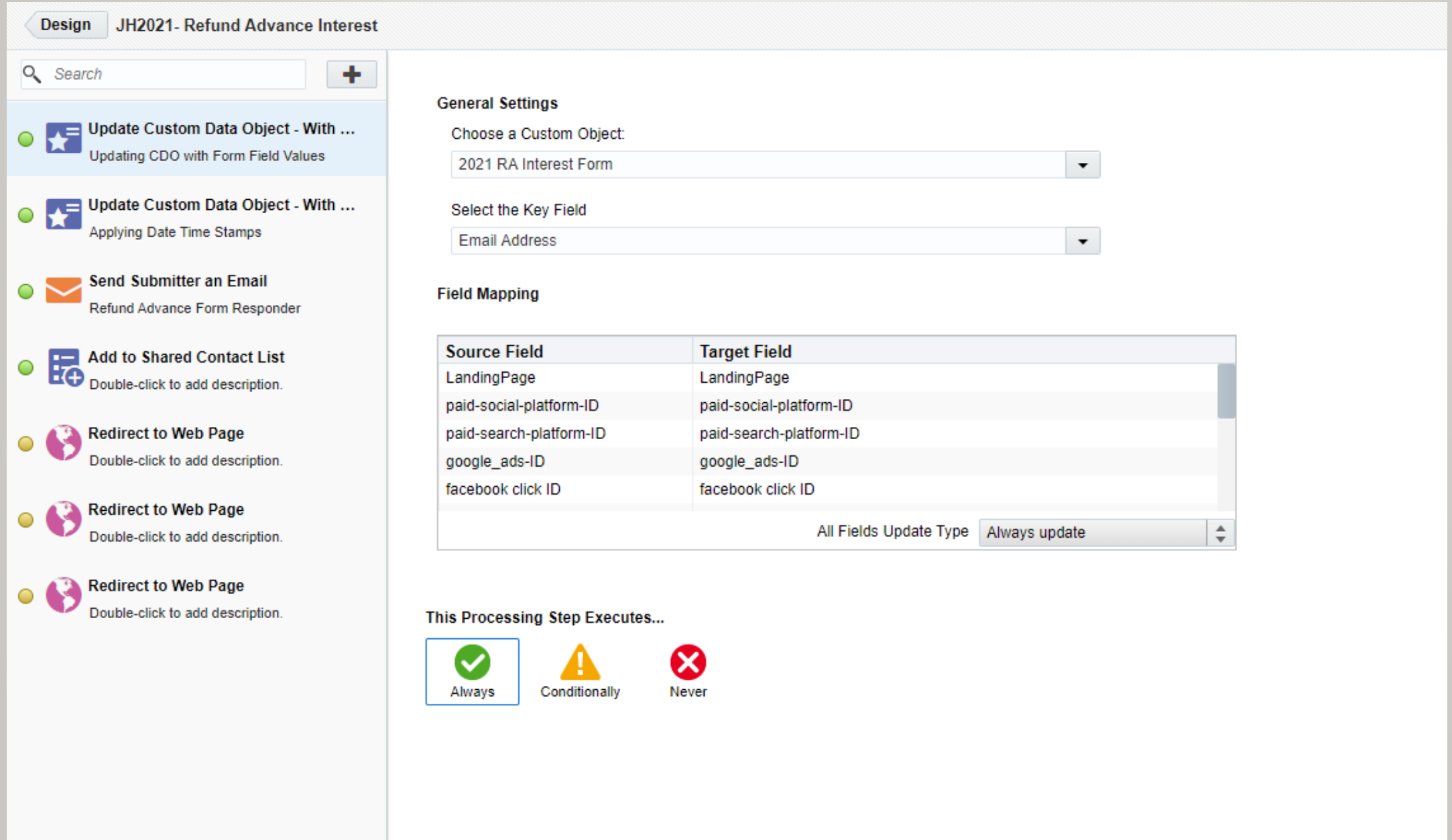
- Jackson Hewitt offers a loan product in conjunction with a national financial group.
- Loans are made available from mid November onwards
- An Eloqua form is created and placed on our website to create and capture leads interested in the launch of the product.
- A small segment of VIP preselected customers are sent out preapproved emails and invited to apply for their loans early.
- Once the website launches, I handle the triggered loan outcome emails.
- An auto synch is setup where Eloqua picks up the data files from a SFTP and processes directly to the Contact Record, where segments can be created using these fields.

Refund Advance Interest Eloqua Form

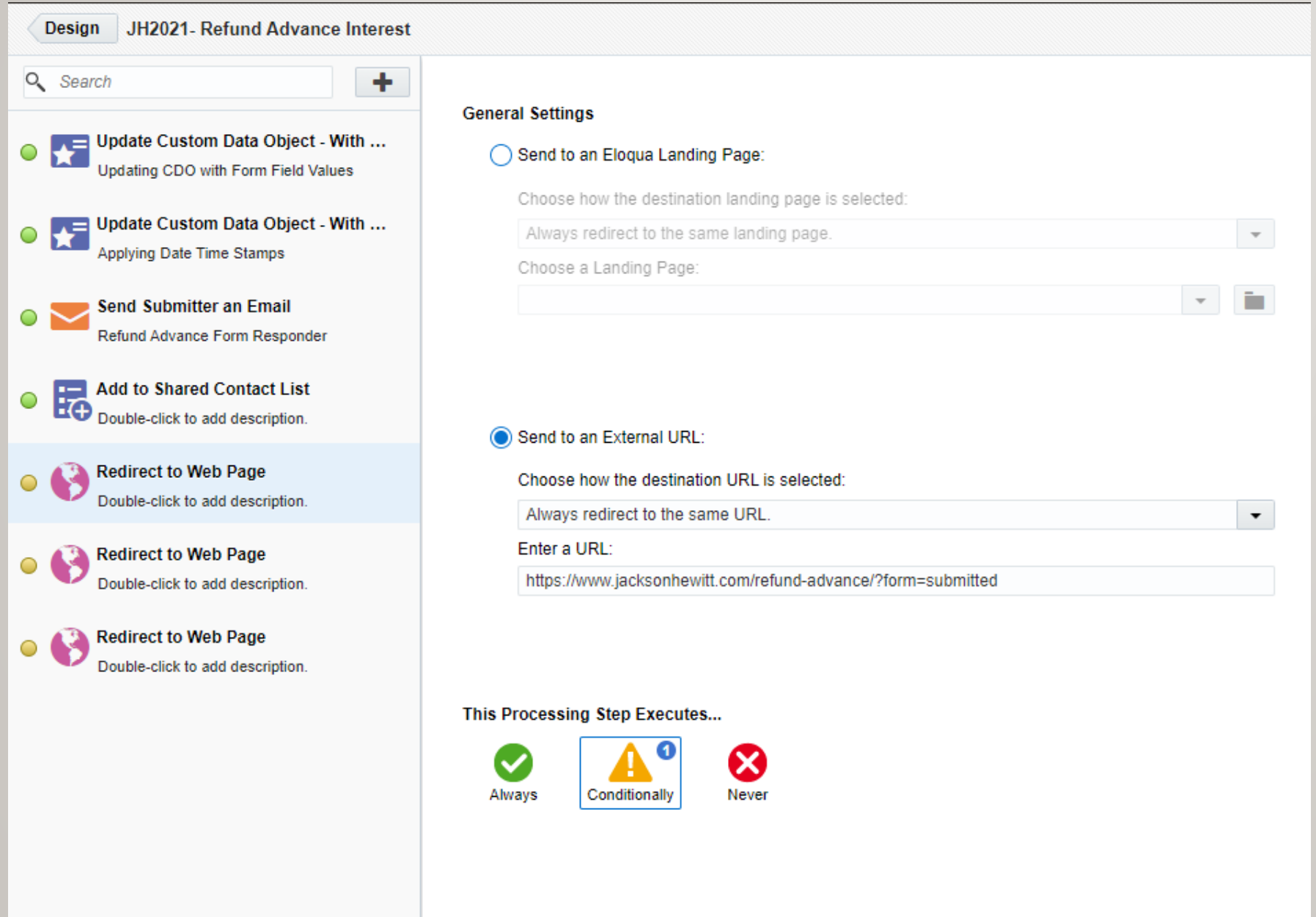
Hidden fields for tracking purposes



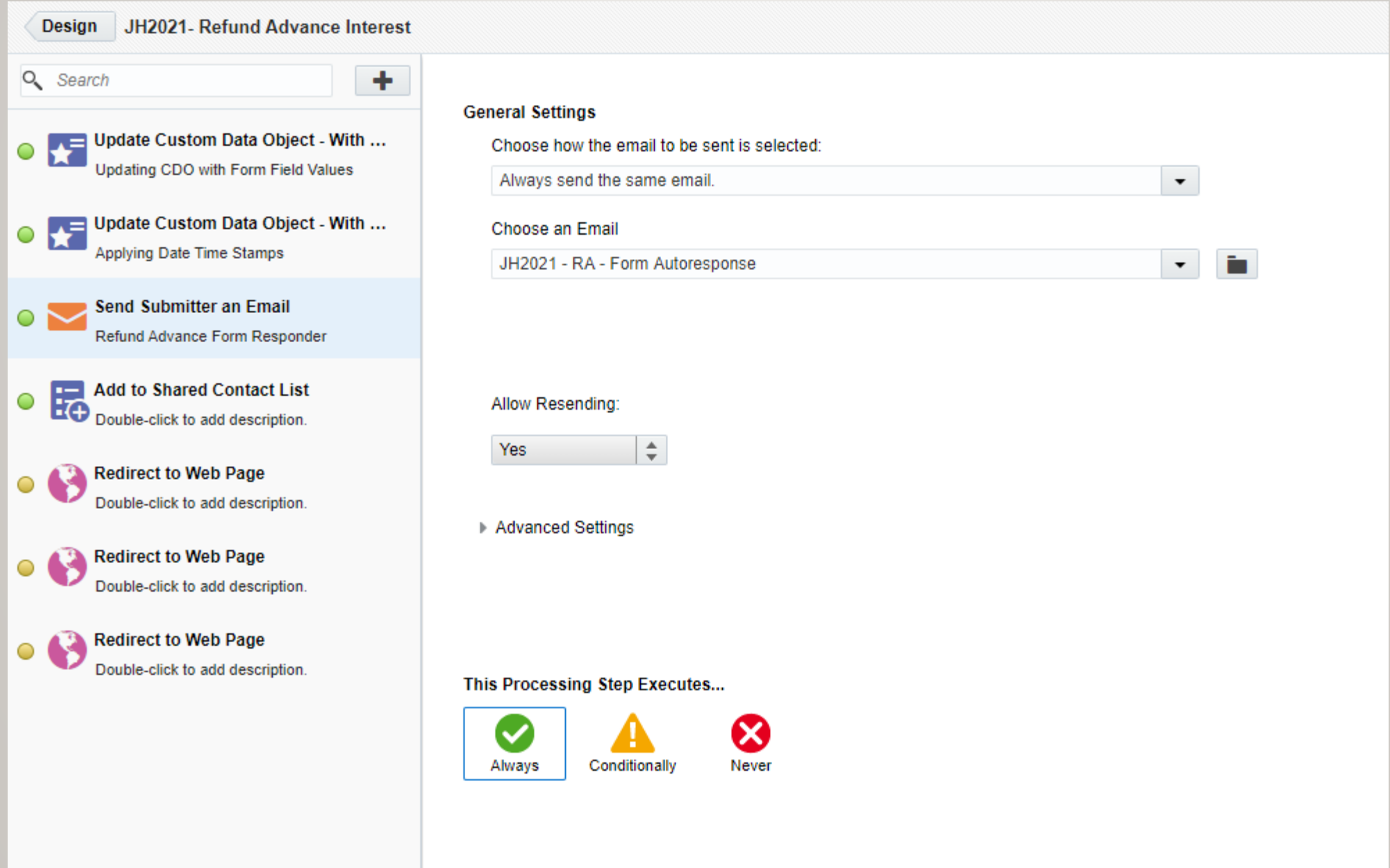
Refund Advance Interest Eloqua Form - Processing Steps



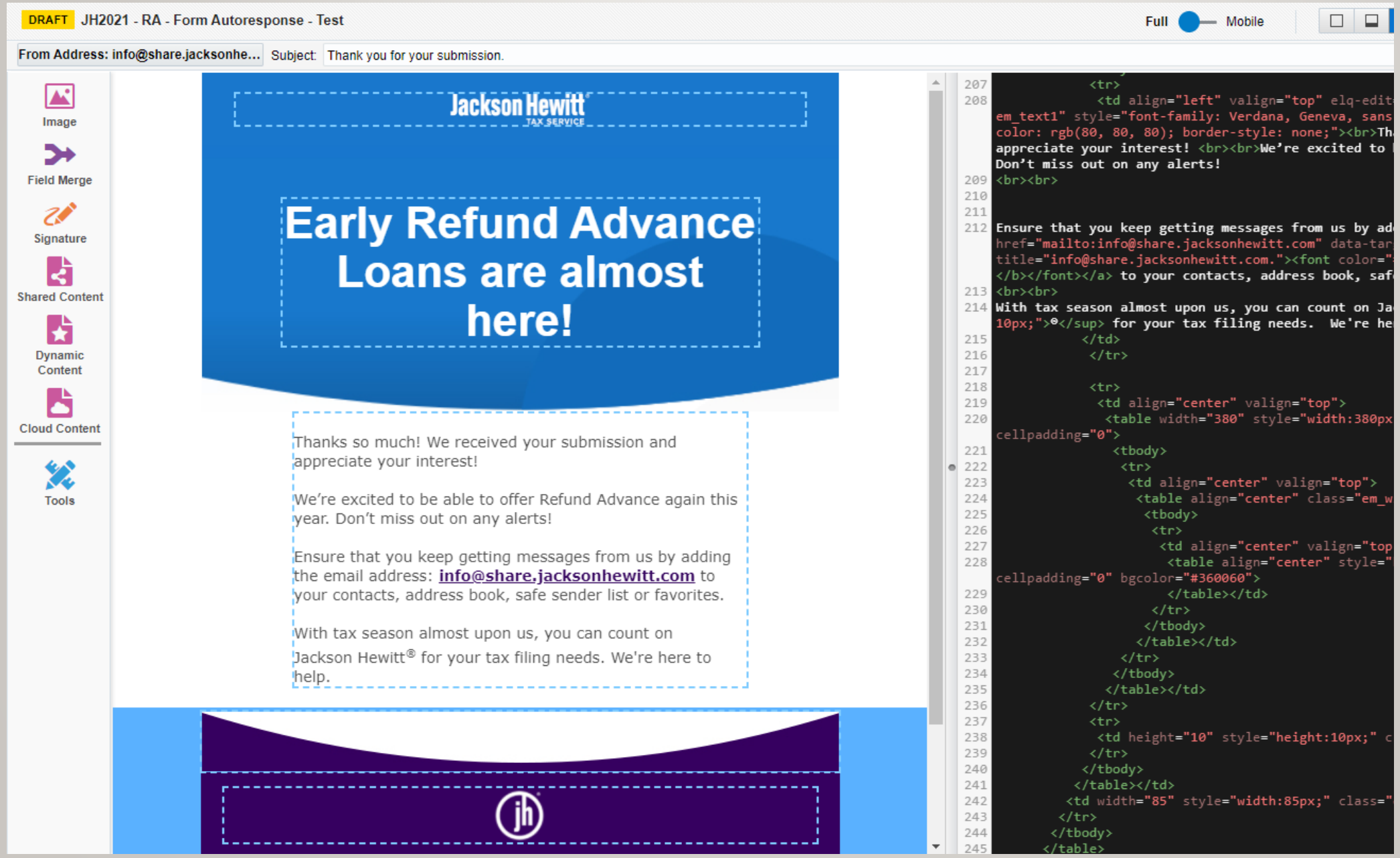
Refund Advance Interest Form - Conditional webpage redirects



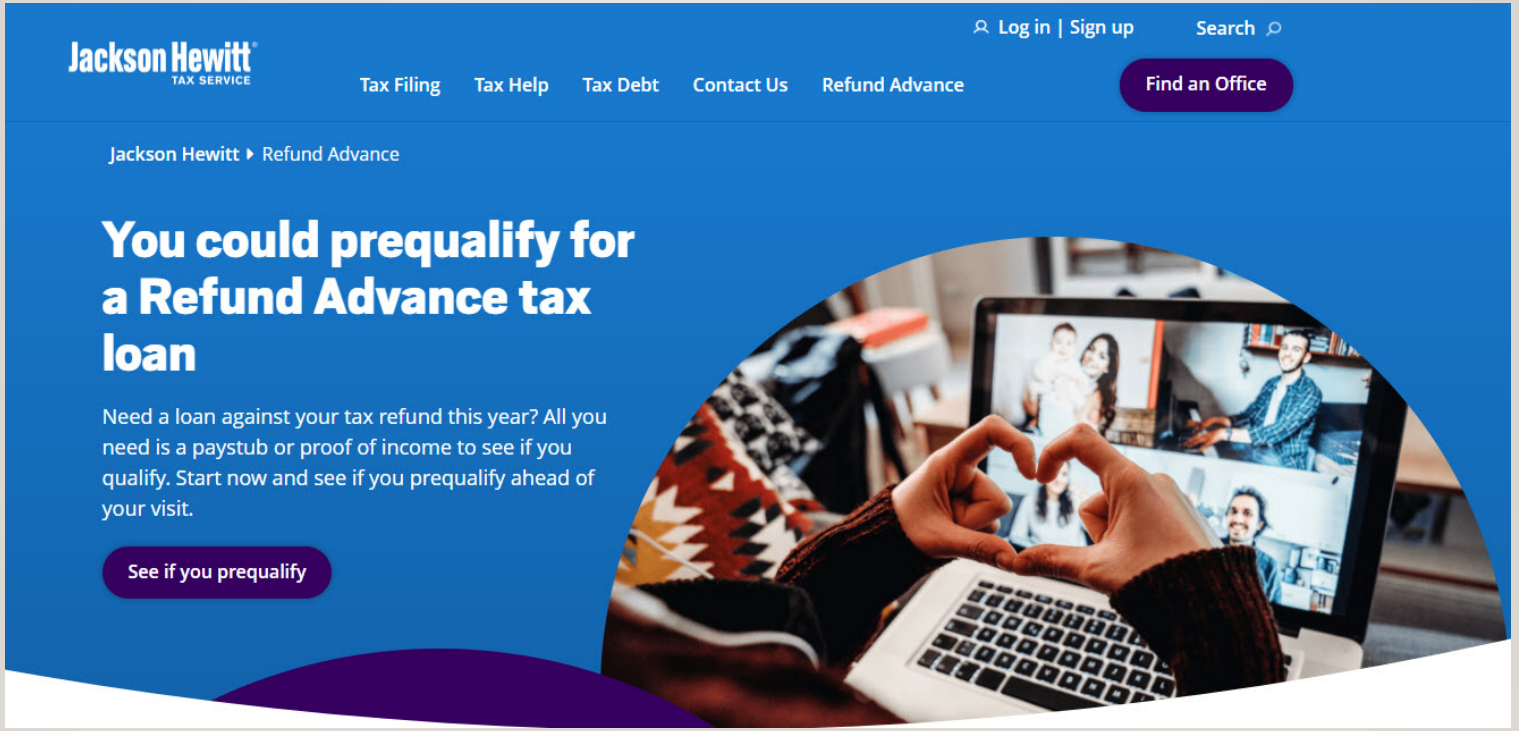
Refund Advance Interest Form – Submitter Email



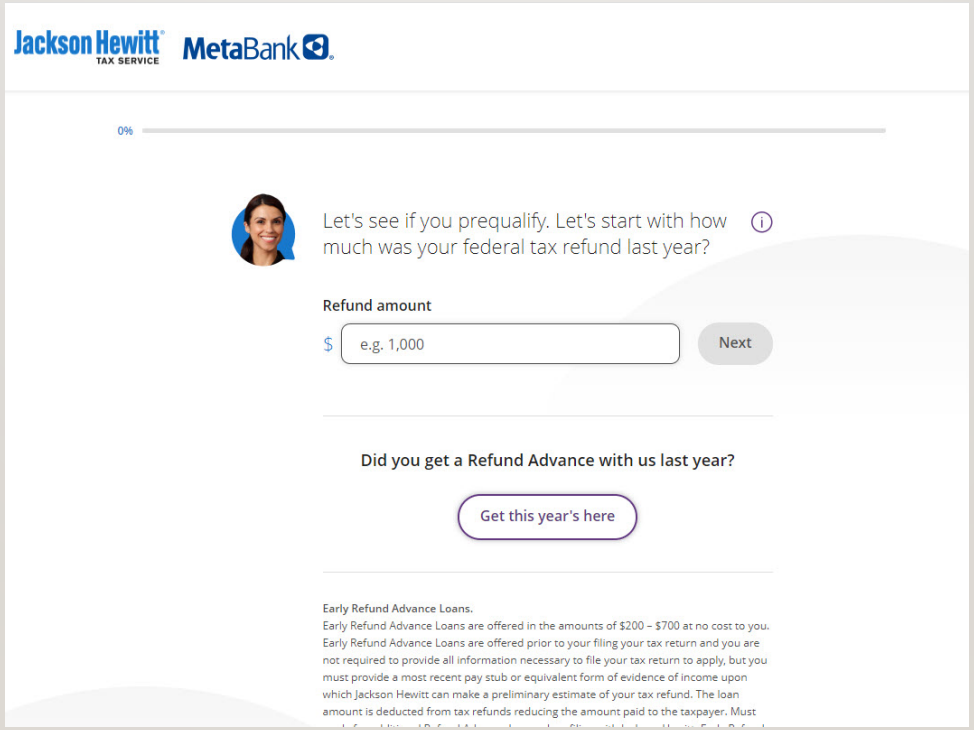
Refund Advance Interest Form – Submitter Email



JACKSON HEWITT'S LOAN PRODUCT IS LIVE.



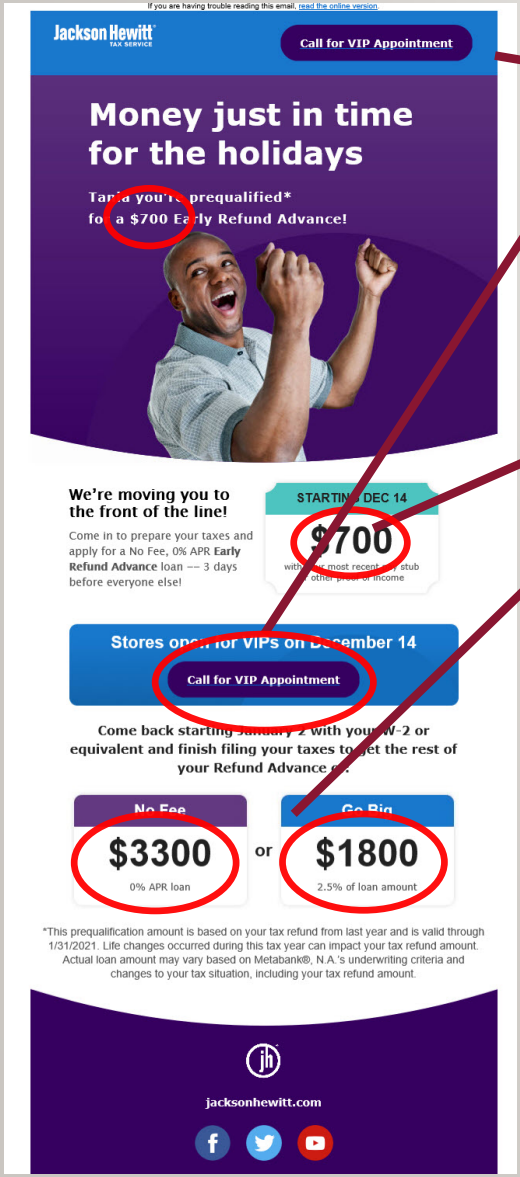
LOAN APPLICATION



Triggered outcome email based on a customer applying for the Refund Advance loan on the Jackson Hewitt website.

Email Example:VIP Preselected customer who qualifies for all 3 loan products

REFUND ADVANCE LOANS – NO FEE + PAYSTUB + GO BIG LOANS

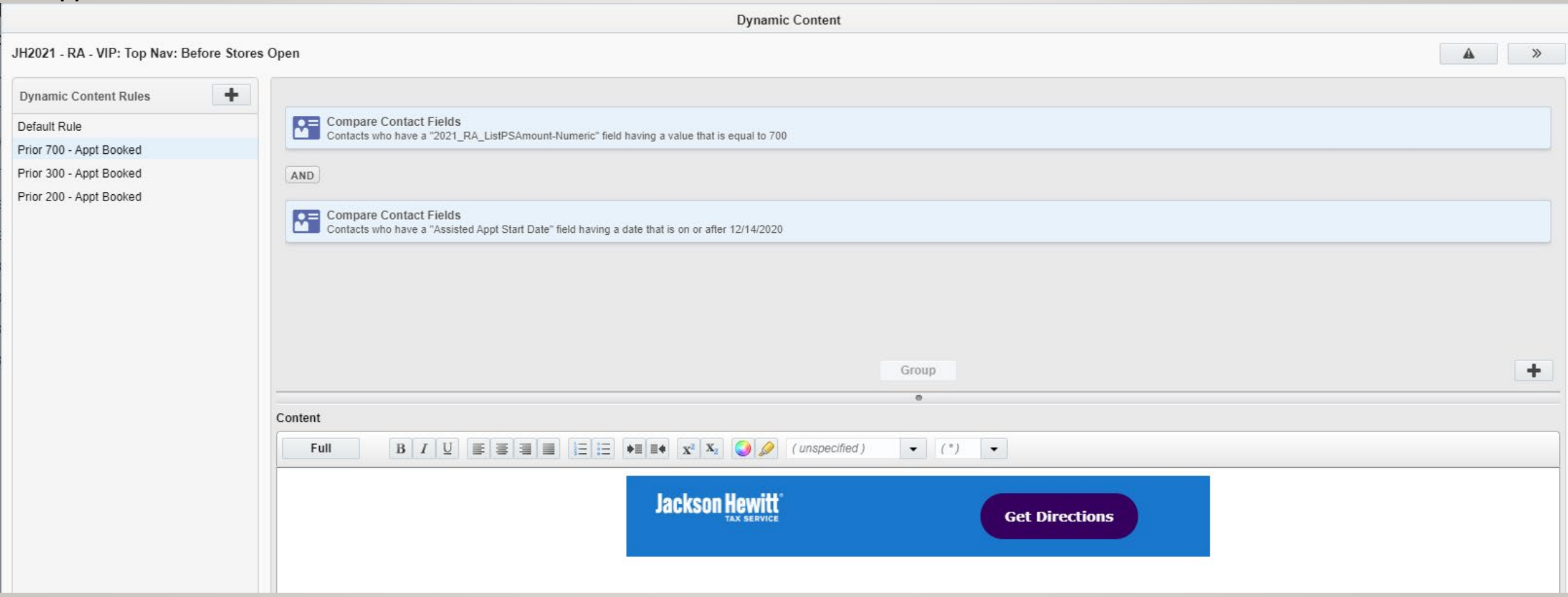


Dynamic Content = based on customer $ amount and whether they have booked an appointment or not

Merge field based on $ amount in customer contact field

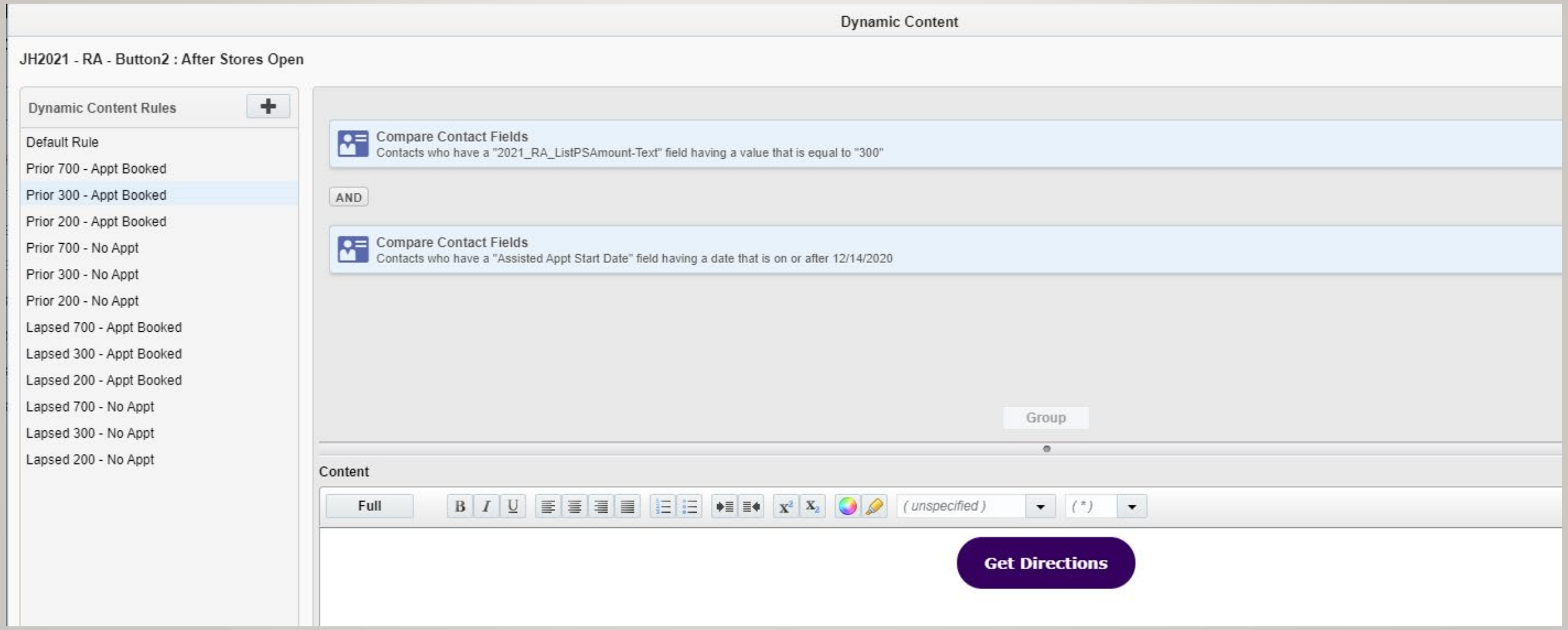
Dynamic Content for Top Navigation for Email

Based on the $ amount loan that the customer qualified for as well as whether they have booked an appointment at an office or not



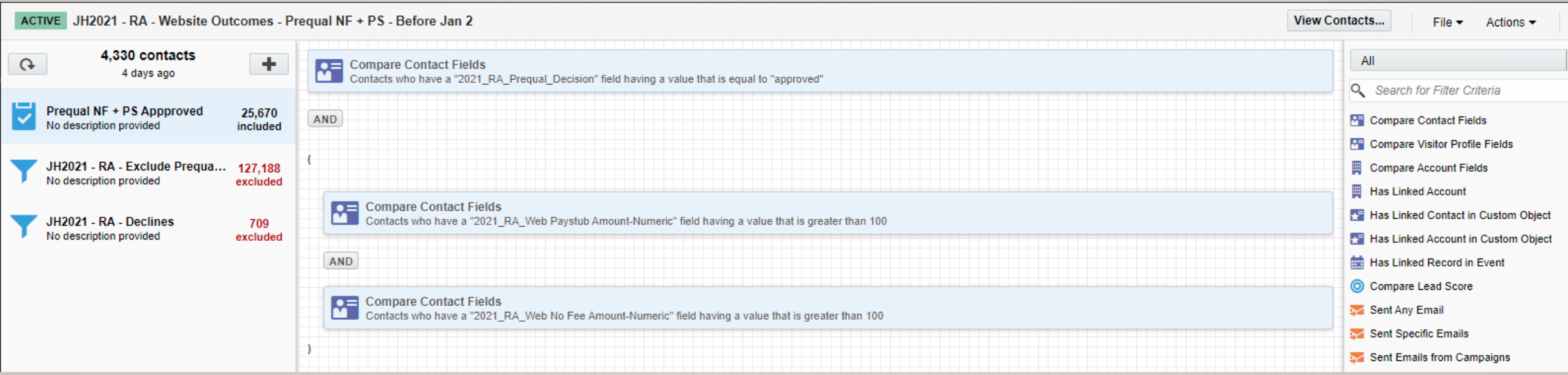
Dynamic Content for Button for Email

Based on the $ amount loan that the customer qualified for as well as whether they have booked an appointment at an office or not

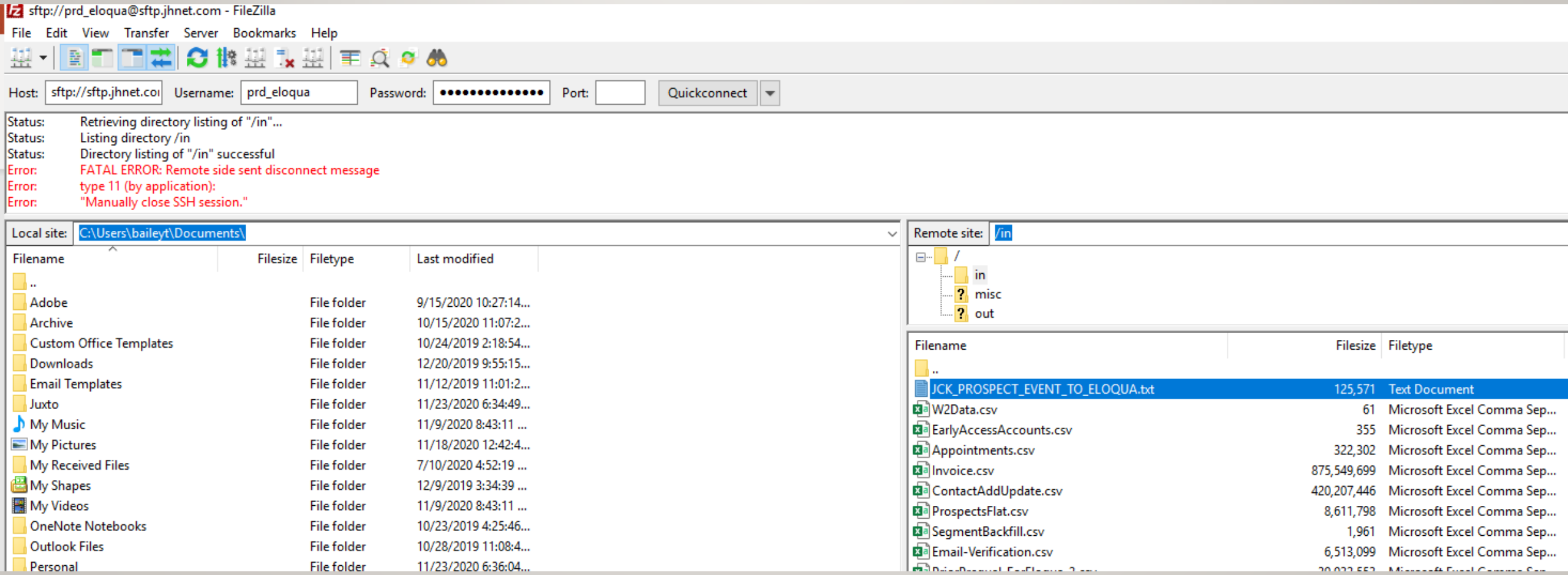


Segment for Refund Advance Email

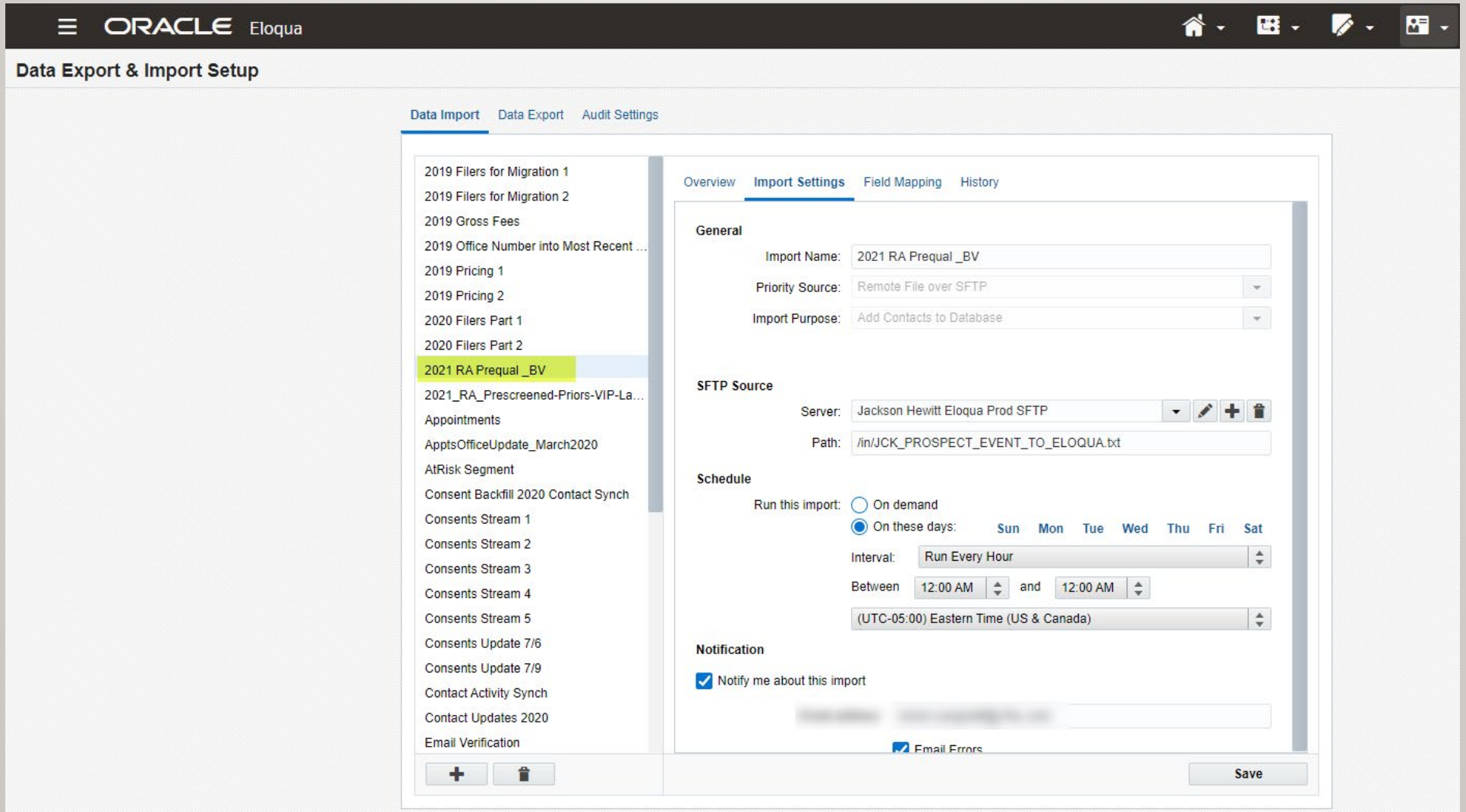
- Criteria: customer has been approved for loan AND (Loan amount based on customer paystub is > $100 + No Fee loan amount is > $100)
- Unsubscribes not excluded due to the communication being customer action triggered
- People who were denied the loan excluded and sent a separate denial email
- Since people can apply for the loan multiple times, our BI team dedupes the data based on various factors (email address, customer ID, social security number etc) and we only see one outcome per application in the data that is sent to Eloqua.



SFTP where files are dropped by our BI team

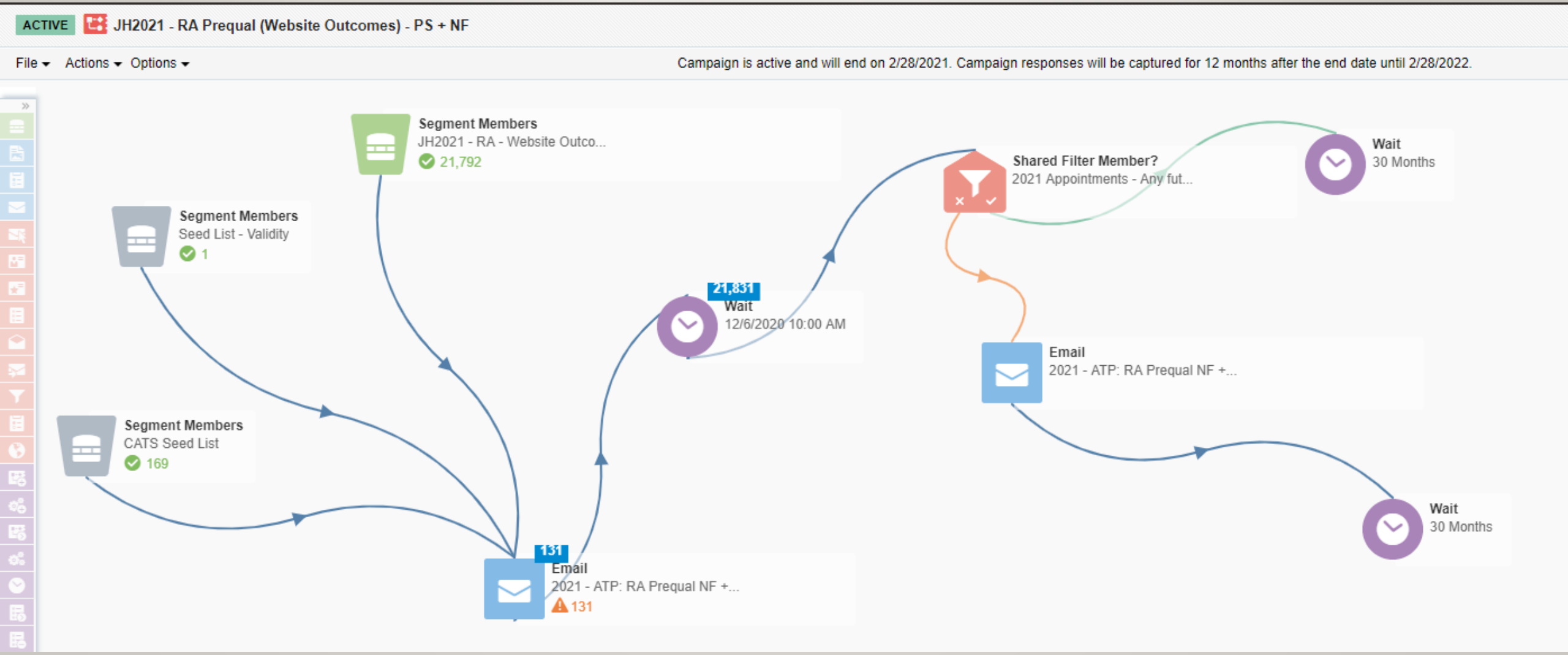


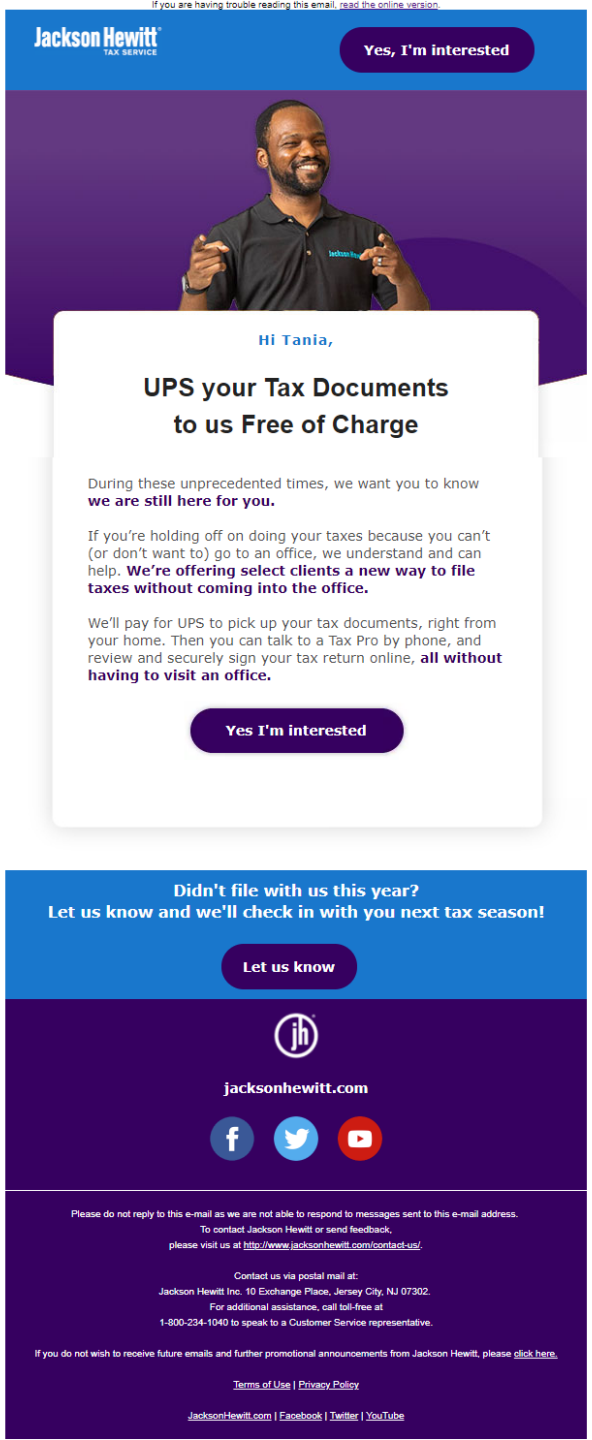
Data Import for Refund Advance loan product that gets mapped to the Eloqua contact record to create segments



Campaign Canvas for one Refund Advance loan product

This has been simplified since these are regarded as service emails



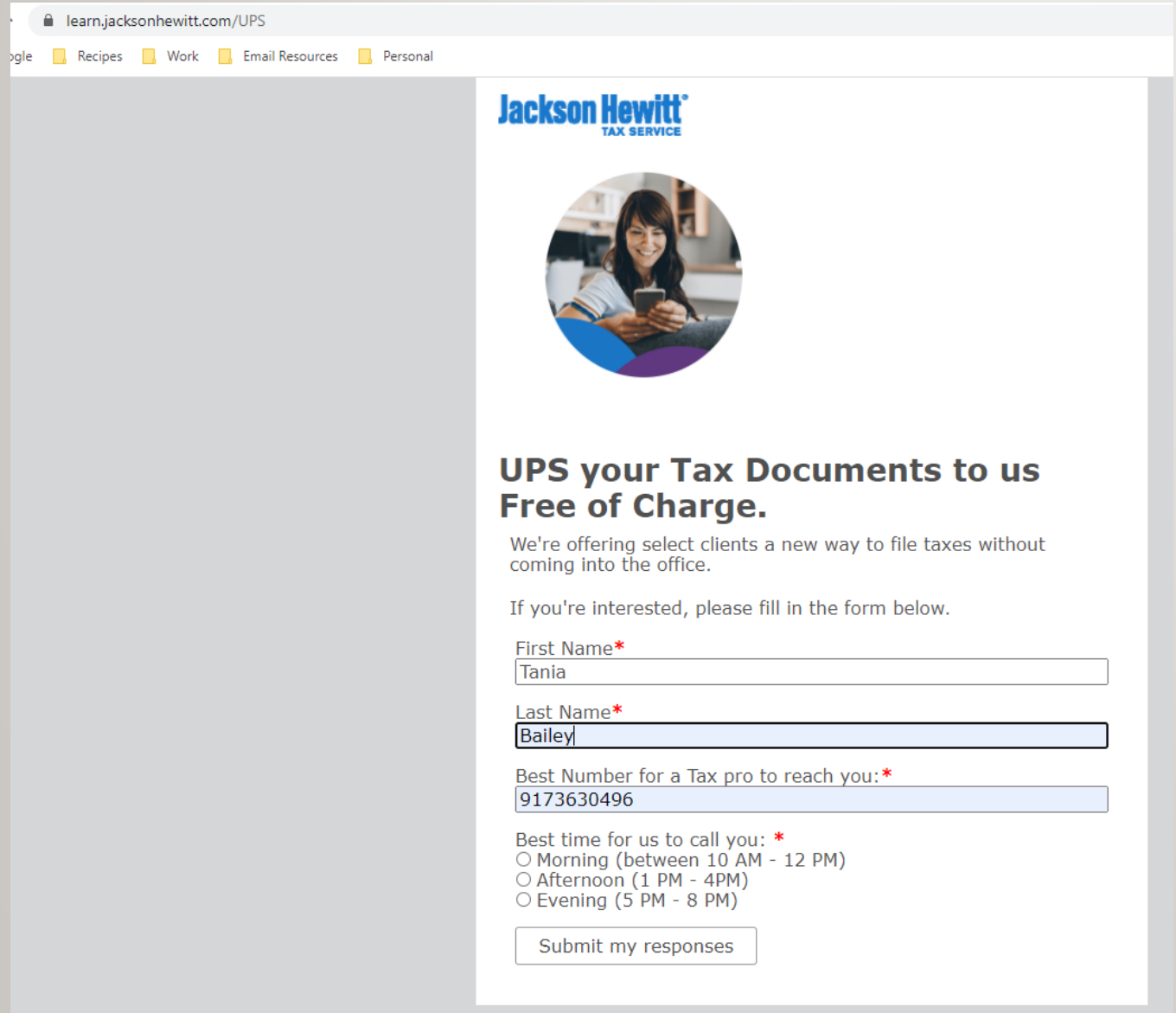


UPS CAMPAIGN – MID JULY 2020

- A trial was conducted to see how customers would respond to an offer for us to pay for their documents to be sent to their local office for a tax pro to complete their tax return, show them the outcome and file it with the IRS.
- This email was sent to a select number of customers.
- The "Yes, I'm interested" button went to an Eloqua landing page with an Eloqua form that I created.
- We also took this opportunity to find out if during this extraordinary time period, customers had filed their taxes elsewhere, which would help us with email cadence, frequency and exclusions.

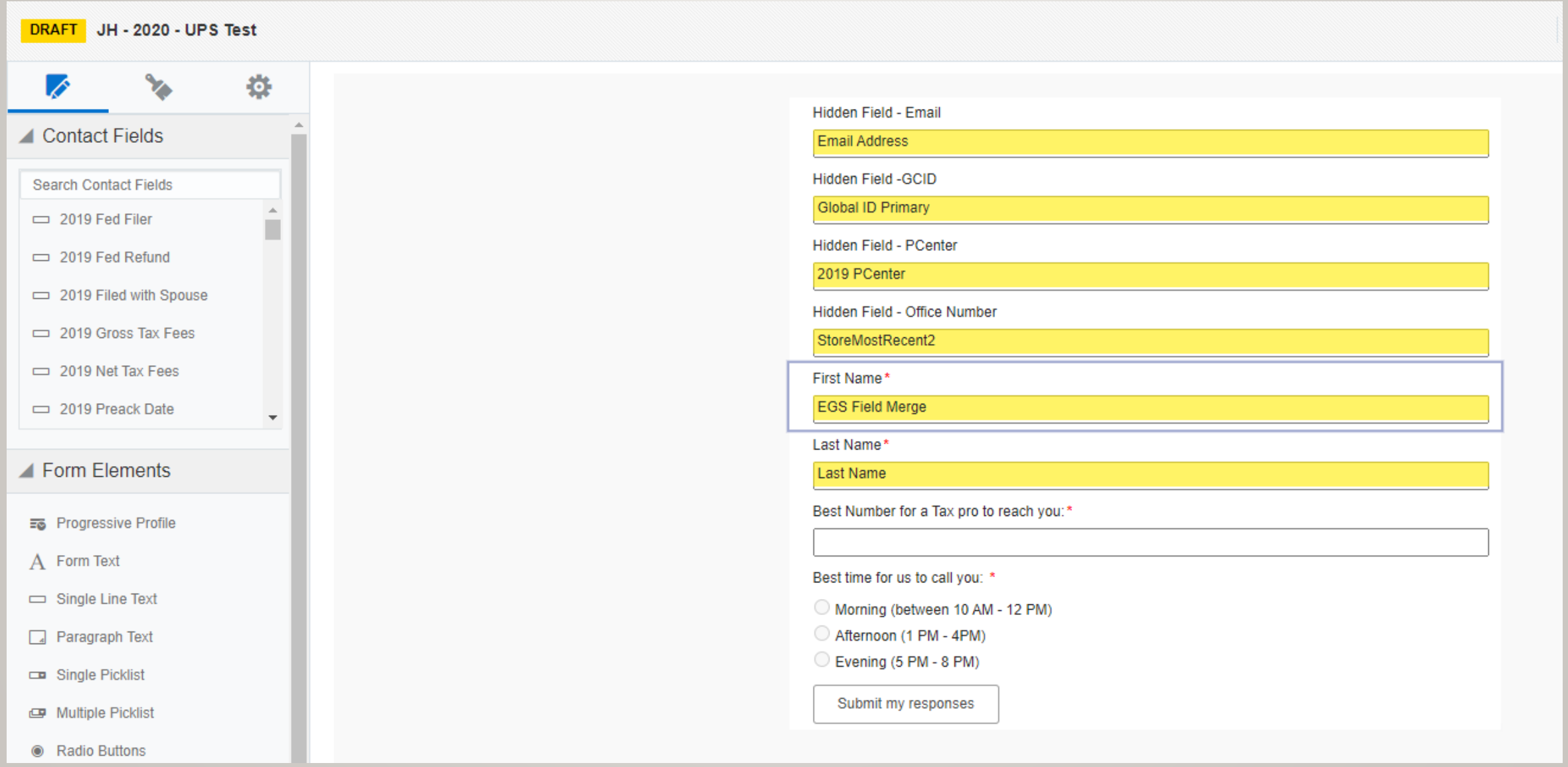
Landing Page for customers interested in using UPS service for tax filing

URL: https://learn.jacksonhewitt.com/UPS



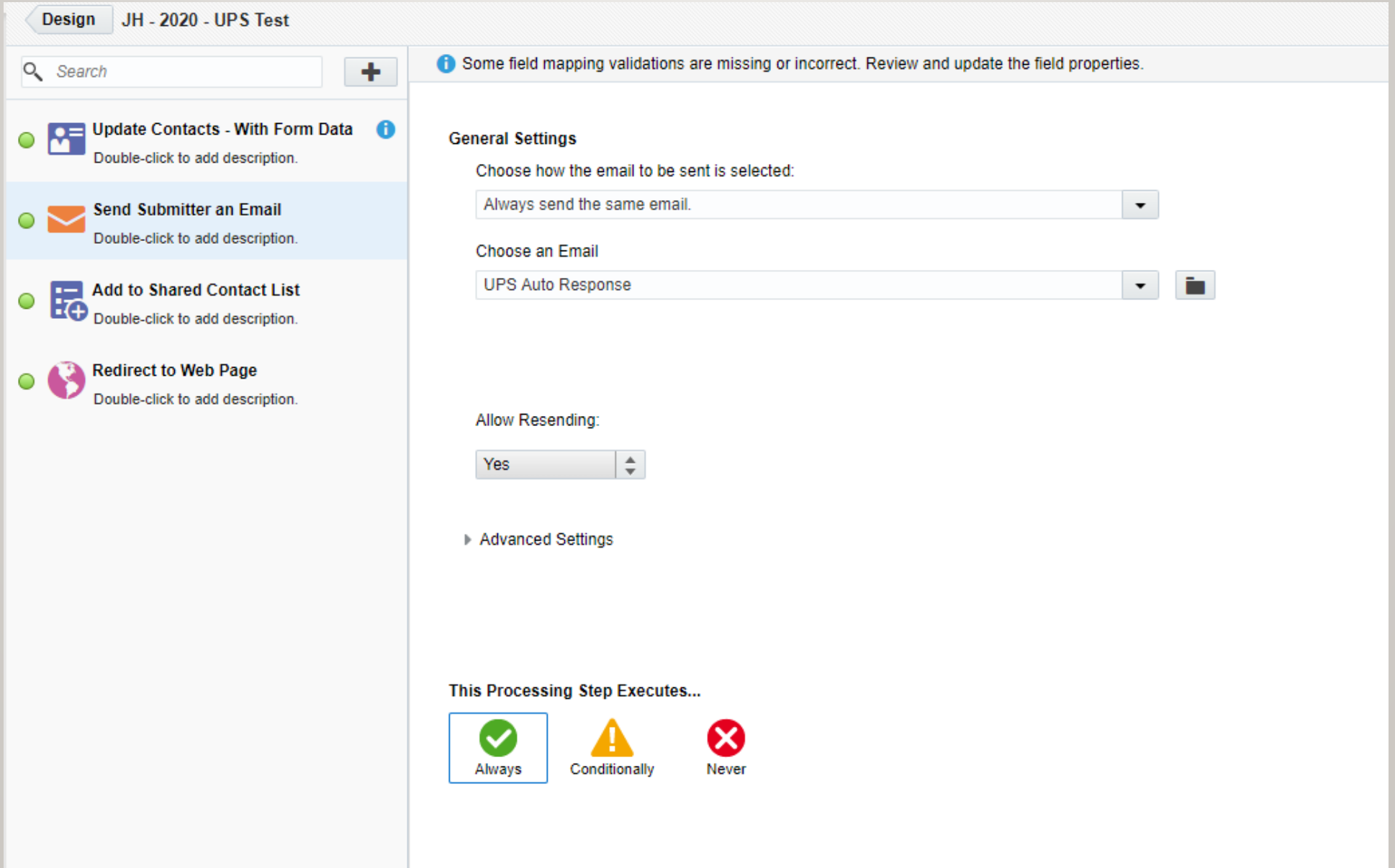
Eloqua Form for UPS

Note the hidden fields



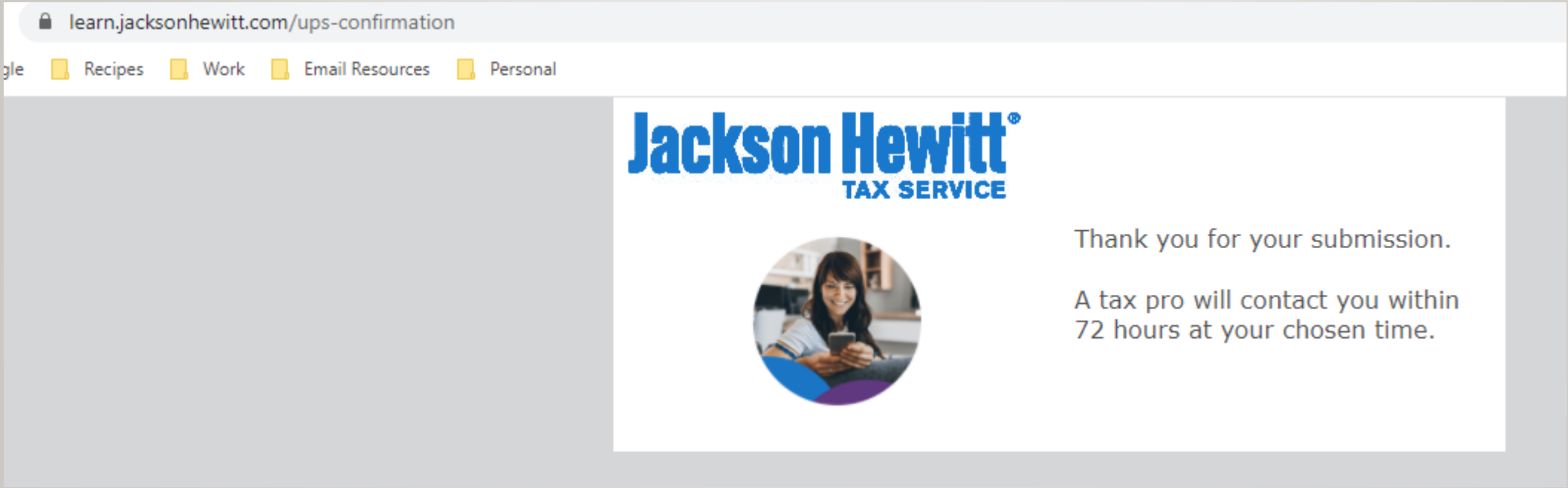
Eloqua Processing Steps for form for UPS

Note the auto responder email



Confirmation Landing Page for customers interested in using UPS service for tax filing

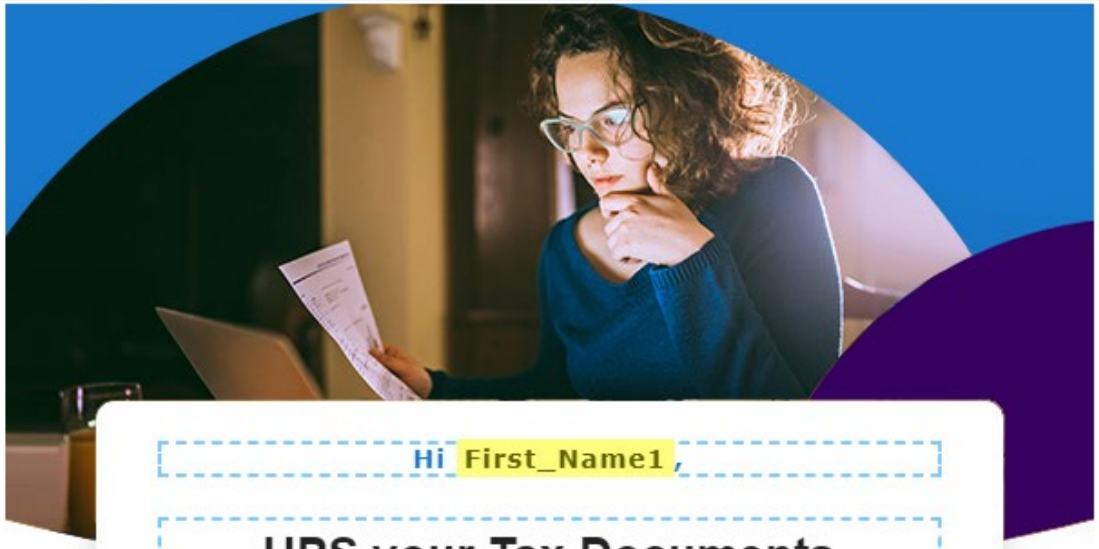
URL: https://learn.jacksonhewitt.com/ups-confirmation



DRAFT UPS Auto Response

From Address: info@share.jacksonhe... Subject: Thank you for your interest in sending your tax documents to us free of charge via UPS!

Image
Field Merge
Signature
Shared Content
Dynamic Content
Cloud Content
Tools



Hi First_Name1 ,

UPS your Tax Documents To Us and We Pay

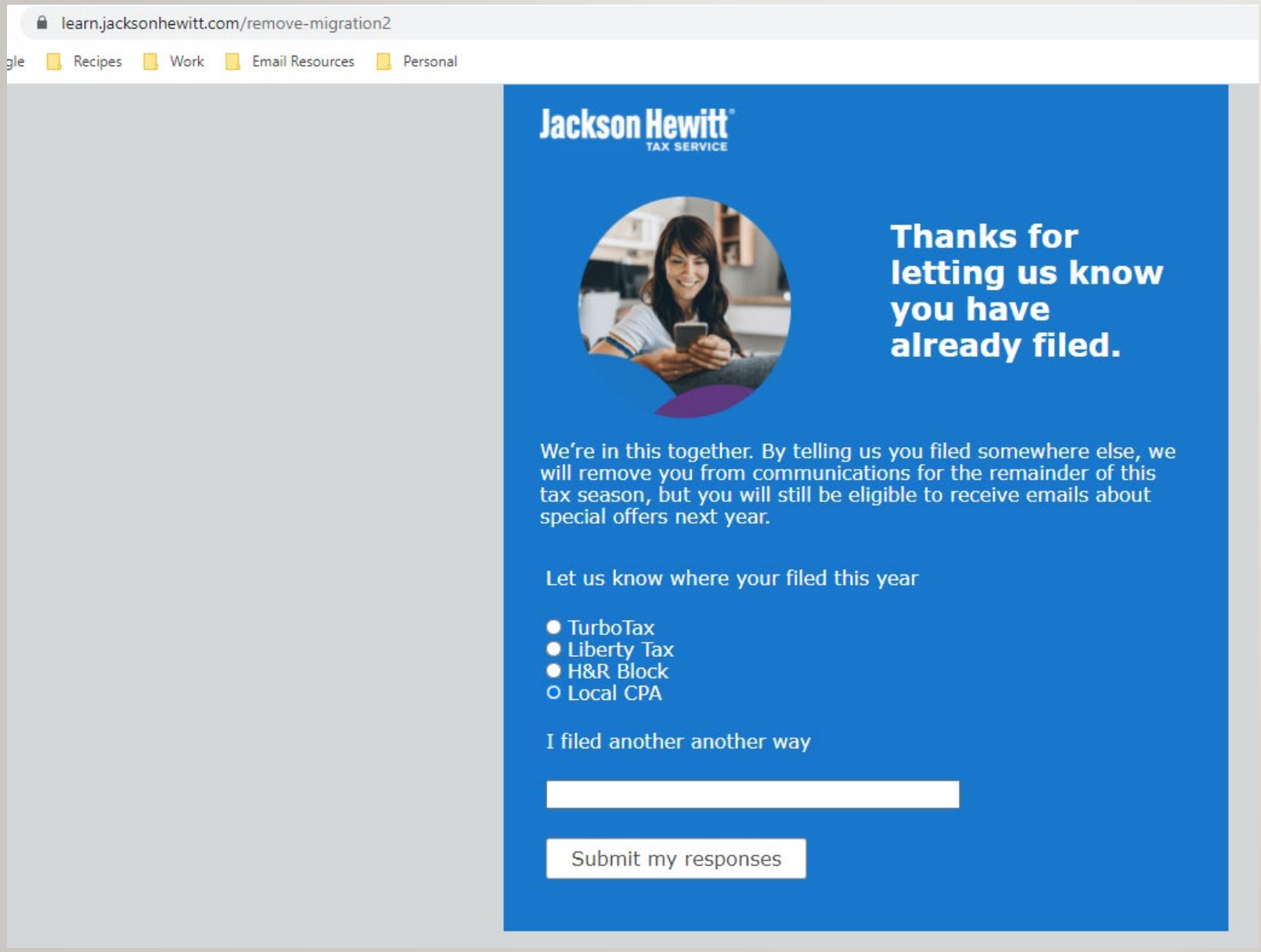
Thank you for signing up to learn more about how **Jackson Hewitt® can help prepare your taxes by having UPS pick up your tax documents, right from your home.**

A Tax Pro will be reaching out to you within the next 72 hours to discuss this new way to file taxes without coming to our office.

Please note that due to high volume, if you have not heard from a Tax Pro, please reach out to us at the following number: **1-800-234-1040** or visit **Jackson Hewitt.com.**

P.S. If we received your request close to the tax deadline we will make every effort to file an extension before completing your tax return.

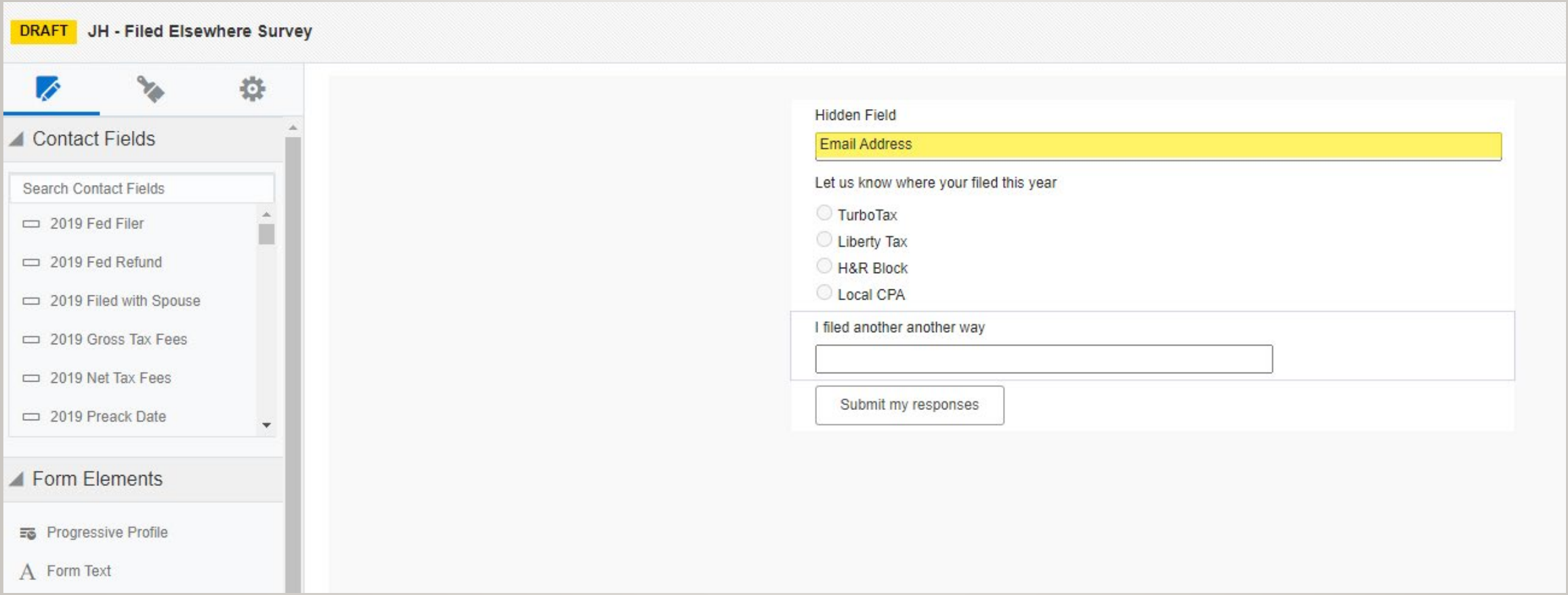
Auto responder email to customers filling out the form interested in the UPS pick up service



Landing page with Eloqua form for customers to let us know that they have completed filing their taxes elsewhere

URL
https://learn.jacksonhewitt.com/remove-migration2

Eloqua Form for Filed Elsewhere



THANK YOU FOR TAKING THE TIME TO REVIEW MY PORTFOLIO OF EXAMPLES OF ELOQUA ASSETS.

IF YOU HAVE ANY QUESTIONS OR WOULD LIKE ME TO WALK YOU THROUGH THESE EXAMPLES, PLEASE CONTACT ME USING THE DETAILS BELOW:

- TANIABEE@GMAIL.COM
- PHONE: 917-363-0496