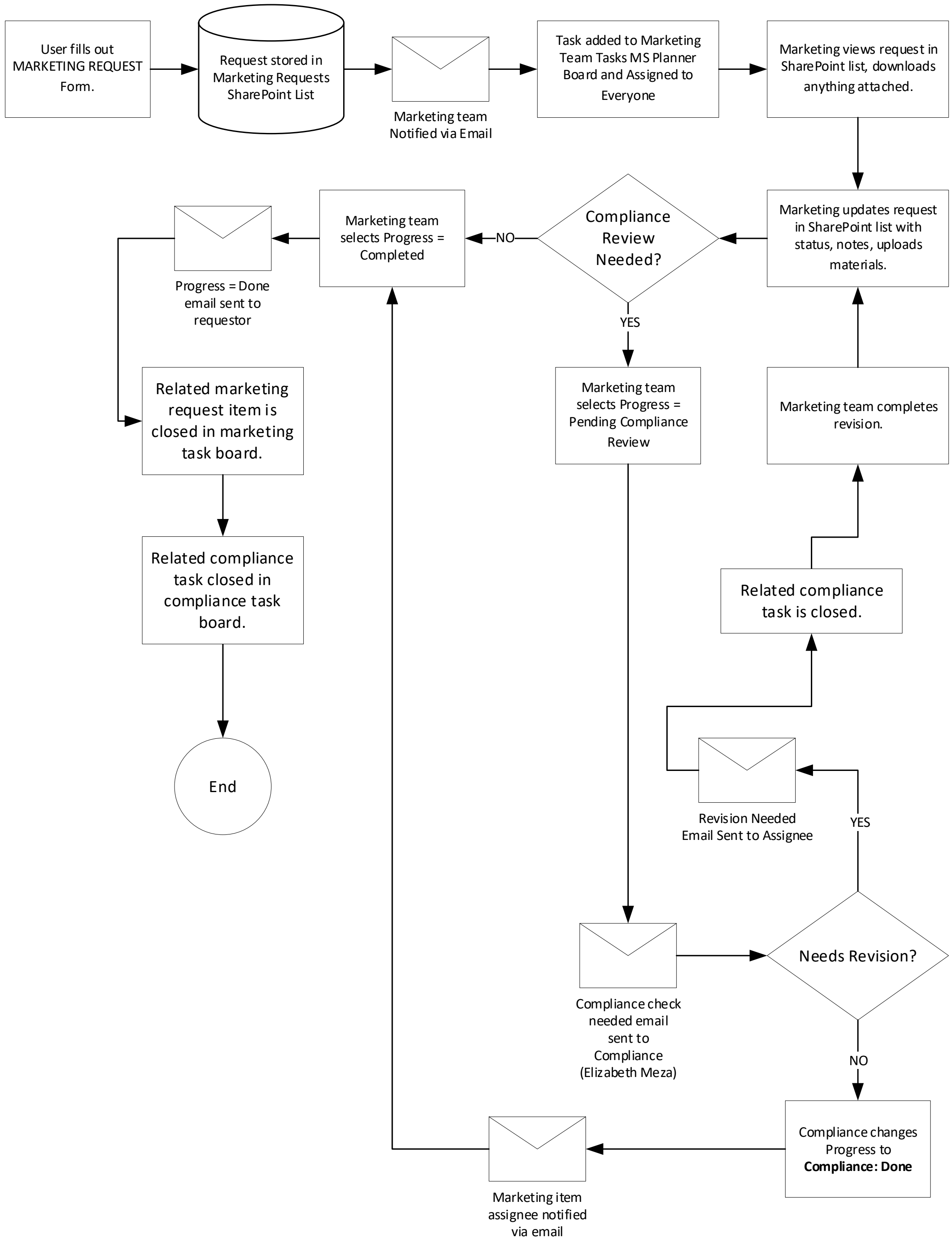
Marketing Request Process

1 Workflow Overview



2 Systems Used

3 Marketing Review Request – Microsoft Forms

Form Name: Marketing Request Form

Subtitle: Please allow us 3-5 business days to respond to your request. Some projects may take longer.

Linked from Manager Portal > Marketing Resources page as "Marketing Request Form".

Order	Field Name	Type	Required	Options
Section 1: General Info				
1	Your Name	Text	Yes	
2	Your Email	Text	Yes	
3	Your Phone	Text	Yes	
4	For which branch or team are we doing this work?	Text	Yes	
5	When do you need the material(s)? *Please allow us 3-5 business days to respond to your request. Some projects may take longer.*	Date	Yes	
6	Request Type *If you need more than one of these, please submit one request per project to be done.*	Radio buttons	Yes	Banner Business Cards Email Marketing Flyer Headshot

				Logo Poster Presentation Social Media Post Stickers Videos
Section 2: Project Description				
7	What topic or content is it about?	Text	Yes	
8	What do you want to highlight?	Text	Yes	
9	In what state(s) will this be advertised?	Text	Yes	
10	Is this a co-branded material?	Radio buttons	Yes	Yes No
Section 3: Co-Branded Material (Shown and required only if "Is this a co-branded material?" = Yes)				
11	Realtor Name	Text	Yes	
12	Realtor Title	Text	Yes	
13	Realtor DRE#	Text	Yes	
14	Realtor Phone Number	Text	Yes	
15	Realtor Email Address	Text	Yes	
16	Realtor Website	Text	Yes	
Section 4: Upload any Relevant Files				
17	Upload inspirations, headshots, QR codes, and anything else relevant to this request.	Upload	No	10 file limit, 100 Mb each
~~Section 5: Permission to Use~~				
~~18~~	~~Is it OK for us to rebrand your materials to be used by other teams or branches?~~	~~Radio buttons~~	~~Yes~~	~~Yes~~ ~~No~~

Permission to use section and question was removed per Ed Vacarro on 5/17/2024.

4 Marketing Team SharePoint Site

https://clslenders.sharepoint.com/sites/Marketingteam/

5 Marketing Requests SharePoint List

https://clslenders.sharepoint.com/sites/Marketingteam/Lists/Marketing%20Materials%20Requests/AllItems.aspx

Upon submission of the Marketing Request Form, a new item will be added to the list with the "Progress" of "New". All field types are text. Fields of the list are as follows:

5.1 List Columns

Field Name	Notes
Request Date	(automatically created)
Progress	(see Progress Types)
Assigned To	(default = blank)
Compliance Notes	
Completion Notes	Whatever is put here will be sent to requestor when Progress = "Completed"
Requestor Name	
Requestor Email	
Requestor Phone	
Branch	
Due Date	
Request Type	
Topic	
Highlight	
Advertisement State(s)	
Co-branded?	
Realtor Name	
Realtor Title	
Realtor DRE#	
Realtor Phone Number	
Realtor Email Address	
Realtor Website	
~~Rebrand permission?~~	Removed 5/17/2024
Attachments	
Modified Date	
Modified By	
Internal Notes	(Not sent to requestor)
Task Link	(auto generated link to related task in MS Planner Board)
Task ID	Auto generated task id.

5.2 Progress Types

The field "Progress" triggers functionality later described. It is essential that nobody adds any progress types to the SharePoint list nor change any of these progress types. Doing so could break the automated functionality.

- New (Default value)
- Started
- Compliance: Pending
- Compliance: Done

- Compliance: Needs Revision
- Waiting for Requestor
- Completed

6 Marketing Team Tasks- Microsoft Planner

https://tasks.office.com/email/Home/PlanViews/ExQStjyWWUWauaO1D4jFFGQAA5cr?Type=PlanLink&Channel=Link&CreatedTime=638451833815980000

Bucket Used: Marketing Requests

7 Manual Processes

7.1 Attaching Relevant Files

The "Attachments" field of the Marketing Requests List may be used to attach any relevant documents. Anyone with access to the Marketing site may view these attachments. Requestors **will not** have access to the Marketing Team SharePoint site.

See: Out-of-Scope Company Policy

7.2 When Additional Information / Files Are Needed

The marketing team will communicate outside the system (i.e. direct email, phone, chat) for any additional information or files needed from the requestor. External communications **will not** be stored in the system.

See: Out-of-Scope System Limitations

7.3 Working Documents: Marketing Materials Document Storage

Depending upon the materials requested, the marketing team may have documents stored in external services such as Canva, Exclaimer, etc. This is OK for work in progress that requires the materials to be stored in those systems while they are being worked on. However, the final materials should always be backed up to the SharePoint "Marketing Documents" folders in the SharePoint site. This would be in addition to anything attached to the Marketing Request List which is sent to the requestor.

See: Out-of-scope System Limitations

7.4 Obtaining Compliance Checks

The marketing team will communicate with compliance checking team members via email.

7.5 Updating SharePoint Request and Tasks

This is now automated. When the marketing request status is set to "Completed" the related task in the marketing tasks board is closed.

Marketing Request Process

~~Since there is no synchronization between the Marketing Requests SharePoint list and the Marketing Team Tasks MS Planner board, the marketing team will need to update the progress of the project both in the SharePoint list and in the MS Planner board. This was discussed with the marketing team on 3/1/2024. The reason for having two separate updates is that one is for the requestors and the other is for management.~~

See: Out of Scope – System Complexity

8 Back End Processes – Power Automate

8.1 New Marketing Request

https://make.powerautomate.com/environments/Default-87525d23-ea88-459a-b0af-6faa4f949a8a/flows/88591d43-7a55-4e4f-8f2e-f3d26f0dcb96/details

What it does:

- Adds request to Marketing Requests lists.
- Sends New Marketing Request to Requestor email.
- Sends New Marketing Request to Marketing Team email.
- Adds a task to the "Marketing Team Tasks" MS Planner Board with a link back to the list item
- Adds the task ID and link to the task created to the item entry.

8.1.1 Microsoft Planner Task Created for Marketing Added Upon Form Submission

Group ID	Marketing (2024)
Plan ID	Marketing Team Tasks
Title	New Marketing Request from {form.Branch} {Submission Date M/dd/yyyy}
Bucket	Marketing Requests
Start Date Time	Now()
End Date Time	{form. When do you need the material(s)? M/dd/yyyy}
Assigned user IDs	Joliemar Pagtalunan and Lynette Dela Rosa
Description (Notes)	Item Link {list.item link} GENERAL INFORMATION Request Date: {Submission date M/dd/yyyy} Requestor Name: {form.Your Name} Requestor Email: {form.Your Email} Requestor Phone: {form.Your Phone} Branch/Team: {form. For which branch or team are we doing this work?} Due Date: {form. When do you need the material(s)?} Request Type: {form.Request Type} PROJECT DESCRIPTION

	Topic: {form. What topic or content is it about?} Highlight: {form. What do you want to highlight?} State(s): {form. In what state(s) will this be advertised?} Co-Branched? {form. Is this a co-branded material?} CO-BRANDED MATERIAL Realtor Name: {form. Realtor Name} Realtor Title: {form. Realtor Title} Realtor DRE#: {form. Realtor DRE#} Realtor Phone Number: {form. Realtor Phone Number} Realtor Email Address: {form. Realtor Email Address} Realtor Website: {form. Realtor Website} ~~PERMISSION TO USE~~ ~~OK to Rebrand? {form. Is it OK for us to rebrand your materials to be used by other teams or branches?}~~ Please visit the Marketing Team SharePoint site to manage this request. https://clslenders.sharepoint.com/sites/Marketingteam
Checklist items	{none defined}

8.1.2 New Marketing Request to Marketing Team Email

TO	Receiver1@email, Receiver2@email
SUBJECT	New Marketing Request from {form.Branch} {Submission Date M/dd/yyyy}
BODY	Item Link {list.link to item} Task Link {tasks.link to task} GENERAL INFORMATION Request Date: {Submission date M/dd/yyyy} Requestor Name: {form.Your Name} Requestor Email: {form.Your Email} Requestor Phone: {form.Your Phone} Branch/Team: {form. For which branch or team are we doing this work?} Due Date: {form. When do you need the material(s)?} Request Type: {form.Request Type} PROJECT DESCRIPTION Topic: {form. What topic or content is it about?} Highlight: {form. What do you want to highlight?} State(s): {form. In what state(s) will this be advertised?}

	Co-Branched? {form. Is this a co-branded material?} CO-BRANDED MATERIAL Realtor Name: {form. Realtor Name} Realtor Title: {form. Realtor Title} Realtor DRE#: {form. Realtor DRE#} Realtor Phone Number: {form. Realtor Phone Number} Realtor Email Address: {form. Realtor Email Address} Realtor Website: {form. Realtor Website} ~~PERMISSION TO USE~~ ~~OK to Rebrand? {form. Is it OK for us to rebrand your materials to be used by other teams or branches?}~~ Please visit the Marketing Team SharePoint site to manage this request. https://clslenders.sharepoint.com/sites/Marketingteam

8.1.3 New Marketing Request to Requestor Email

TO	Form.Your Email
SUBJECT	New Marketing Request from {form.Branch} {Submission Date M/dd/yyyy}
BODY	Your marketing request has been received. GENERAL INFORMATION Request Date: {Submission date M/dd/yyyy} Requestor Name: {form.Your Name} Requestor Email: {form.Your Email} Requestor Phone: {form.Your Phone} Branch/Team: {form. For which branch or team are we doing this work?} Due Date: {form. When do you need the material(s)?} Request Type: {form.Request Type} PROJECT DESCRIPTION Topic: {form. What topic or content is it about?} Highlight: {form. What do you want to highlight?} State(s): {form. In what state(s) will this be advertised?} Co-Branched? {form. Is this a co-branded material?} CO-BRANDED MATERIAL Realtor Name: {form. Realtor Name} Realtor Title: {form. Realtor Title} Realtor DRE#: {form. Realtor DRE#}

	Realtor Phone Number: {form. Realtor Phone Number} Realtor Email Address: {form. Realtor Email Address} Realtor Website: {form. Realtor Website} ~~PERMISSION TO USE~~ ~~OK to Rebrand? {form. Is it OK for us to rebrand your materials to be used by other teams or branches?}~~

8.2 When Progress = Compliance: Pending

https://make.powerautomate.com/environments/Default-87525d23-ea88-459a-b0af-6faa4f949a8a/flows/3233b5ee-12e7-4942-b09b-1a047d05981d/details?v3=false

What it does:

- Every 5 minutes, it scans through the list of marketing request items detecting changes to the Progress field. If that field value equals “Compliance: Pending”, then an email is sent to Marina Hanna.
- It creates a task in the Compliance Portal: Marketing Compliance Checks bucket

8.2.1 Marketing Compliance Check Needed Email

TO	manager@email
SUBJECT	Marketing Request ID: {item id} Needs a Compliance Review
BODY	A marketing compliance review has been requested. Please visit the link below to view the details. {item link} Instructions for Compliance: If changes are needed, add notes to the "Compliance Notes" field and change the Progress to value "Compliance: Needs Revision". If approved, please edit the Progress to value Compliance: Done. For anything else, please contact {assignee name} ({assignee email}) to discuss this marketing request with them directly.

8.2.2 Marketing Compliance Check Task

Group ID	Compliance Manager Portal
Plan ID	Compliance Portal
Title	Marketing Compliance Review for Item {item id}

Bucket	Marketing Compliance Checks
State Date Time	{item last modified date}
Due Date Time	{item due date}
Assigned User IDs	Marina.Hanna@email
Description	{link to item}

8.3 When Progress = Compliance: Revision Needed

https://make.powerautomate.com/environments/Default-87525d23-ea88-459a-b0af-6faa4f949a8a/flows/85de957f-add9-4bda-a132-87c553dd407b/details?v3=false

What it does:

- Every 5 minutes, it scans through the list of marketing request items detecting changes to the Progress field. If that field value equals "Compliance: Revision Needed", then an email is sent to the marketing item assignee along with any notes entered into the "Compliance Notes" field.
- It closes the related compliance task in the compliance task board (since a compliance check was done at this point)

8.3.1 Revision Needed Email

TO	{item assignee email}
SUBJECT	Marketing Request ID: {item id} Needs Compliance Revision
BODY	The following marketing item needs revision. {item link} Compliance Notes: {compliance notes}

8.4 When Progress = Compliance: Done

https://make.powerautomate.com/environments/Default-87525d23-ea88-459a-b0af-6faa4f949a8a/flows/a0adb13e-e43c-48bd-905f-494c48877191/details?v3=false

What it does:

Marketing Request Process

- Every 5 minutes, it scans through the list of marketing request items detecting changes to the Progress field. If that field value equals "Compliance: Done", then an email is sent to the assignee of the marketing request item.
- It closes the related compliance task in the compliance task board (since a compliance check was done at this point)

8.4.1 Marketing Compliance Check Done Email

TO	{item assignee email}
SUBJECT	Marketing Request ID: {item id} Compliance Done
BODY	The compliance team has completed their review of the marketing request below. Please visit the link below to view the details. {item link}

8.5 Email Notification When Progress = Completed

Completed Marketing Request

https://make.powerautomate.com/environments/Default-87525d23-ea88-459a-b0af-6faa4f949a8a/flows/f6ebc4f3-ee50-4a1c-a4ee-5d6f37ee6c19/details

What it does:

- Completes the related task in the MS Planner Board
- Sends an email as shown below with anything attached to the list item.

TO	Form.Your Email
SUBJECT	Completed Marketing Request - {form.Branch} {Submission Date M/dd/yyyy}
BODY	Your marketing request has been completed. See attached file(s). COMPLETION NOTES: {list.competed notes} GENERAL INFORMATION Request Date: {Submission date M/dd/yyyy} Requestor Name: {form.Your Name} Requestor Email: {form.Your Email} Requestor Phone: {form.Your Phone} Branch/Team: {form. For which branch or team are we doing this work?} Due Date: {form. When do you need the material(s)?} Request Type: {form.Request Type}

	PROJECT DESCRIPTION Topic: {form. What topic or content is it about?} Highlight: {form. What do you want to highlight?} State(s): {form. In what state(s) will this be advertised?} Co-Branched? {form. Is this a co-branded material?} CO-BRANDED MATERIAL Realtor Name: {form. Realtor Name} Realtor Title: {form. Realtor Title} Realtor DRE#: {form. Realtor DRE#} Realtor Phone Number: {form. Realtor Phone Number} Realtor Email Address: {form. Realtor Email Address} Realtor Website: {form. Realtor Website} PERMISSION TO USE OK to Rebrand? {form. Is it OK for us to rebrand your materials to be used by other teams or branches?}

8.6 Automatic Task Email Reminders – Microsoft Planner

Microsoft Planner has built-in reminders which will notify task assignees via email of upcoming due dates and past due tasks. Those reminders are configured by each task assignee. By default, they are on, but can be changed if they are overwhelming.

See:

https://support.microsoft.com/en-us/office/manage-planner-notifications-f6a32f83-058d-4f39-988d-8a2e932820ec

9 Out of Scope

9.1 System Limitations

Given the known limitations of the Office 365 environment, the following are out of scope.

1. Communications between the marketing team and requestor which happen outside of the Marketing Requests list will not be attached, synchronized, or linked in any way with the relevant item in that list.
2. Communications between the marketing team and requestor which happen outside of the Marketing Team Tasks board will not be attached, synchronized, or linked in any way with the relevant task in that task board.
3. The Marketing Requests list **attachments** are not linked with documents stored in the SharePoint Marketing Documents library, nor any external service. They are also not accessible directly via any shareable file link because they are stored inside a database.
4. If we had task checklist items, the individual items cannot be assigned to specific people.

5. Microsoft Planner task notes do not contain any HTML markup.
6. There is no way to add dependent tasks. The best option we have of linking tasks together is to use the attachment field.
7. There is no history of changes to list items.
8. Notes fields in list are not threaded, nor time stamped.

9.2 System Complexity

Although this functionality may be technically possible, we decided to skip this functionality due to the complexity of (a) building it and (b) maintaining it if things change in the future. Therefore, the following are out of scope.

1. Changes to the Marketing Requests SharePoint list will not be synchronized with the task in the Marketing Team Tasks board.
    a. In considering this request, we considered the list note field limitations. The workaround is to use the task comments field to have ongoing discussions about items to be done.
2. When a compliance check is needed, there will be no task for the compliance team member associated with it.
3. There are no links between list items and task items.

9.3 Company Policy

Due to company policy, the following are out of scope.

1. Requestors will not have access to the Marketing SharePoint site which includes the document libraries and Marketing Requests List.
    a. Workaround, use the PUBLIC folders and provide links to any documents within list completion notes field.
2. Requestors will not have access to the Marketing Team Tasks board.

9.4 Not Requested

Functionality is available but was not requested.

1. There will be no task checklist items.

Anything else not declared within this document is out of scope.

10 Future Wishlist

Marketing Request Process

10.1 One System for All Marketing Requests, Related Files, Compliance Verifications, Tasks (including tasks for requestors and compliance team members) and Unified Communications

10.2 Requestor / Marketing Team / Compliance Team Dashboards

End of document.