How to Create Auto Response Rules for Campaign Messages

**Market:** House, Senate

Module: Messages

Purpose: This guide provides instruction on how to assign Response Rules for Campaign messages.

Key Benefits

By creating auto-response rules for your campaign messages, you can associate all current and future messages of a campaign to an issue, bill, staff, Form Letter, or batch. These categories can be included in a set of rules that can be automatically applied when responding to all current and future messages for the campaign. Thus, a time-saving technique.

Prior to creating an Auto Response Rule, a best practice is to use the Analyze Text feature to help determine that the messages are considered similar in terms of a campaign. In other words, they are "alike" enough to be assigned the same response rule. See the *How to Use Analyze Test for Campaign Messages* Quick Reference Guide.

1. Navigate to **Messages > Message Center > All Active non-Bill Campaigns**.

2. The results for these records are displayed. Filter the results by using the **Has Campaign Response: NO** to select only those records that currently DO NOT have any campaign response rules set up.
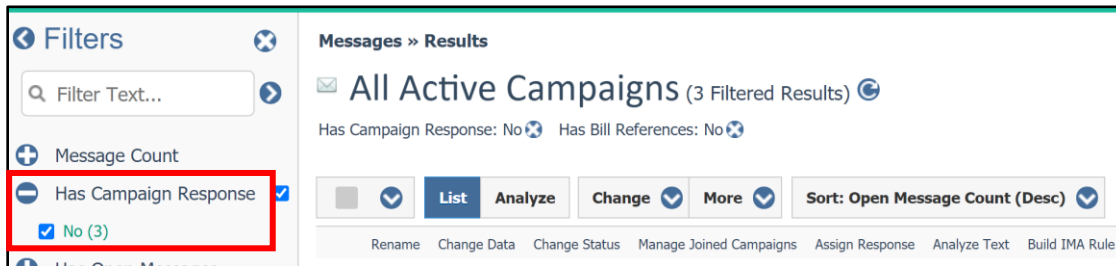
3. Use additional filters such as **CWC Delivery Agent** or Sort options such as **Open Message Count (Desc)** to further refine the search.
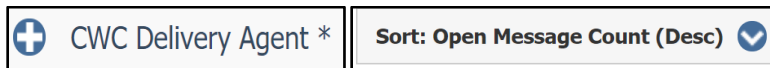
4. Choose the campaign and select **Assign Response**. The **Assign Campaign Response** window appears on the screen.

5. Complete the fields as described below.

a. **Comments:** If appropriate, add any comments about the campaign response:

- **Update if Empty:** Check this box to add additional comments.

- **Remove Existing:** Check this box to remove existing comments.

- **Add to Existing:** If there are comments, check this box and then type your new comments. This will add your new comments to the existing comments.

b. **Issues:** If appropriate, assign the issue code(s) to the campaign. These issue code(s) will then be automatically tied to messages currently in the campaign and all future messages that come into the campaign.

c. **Bill:** If appropriate, select the Bill and the position.

d. **Assigned To:** Select a name of the person who is assigned to handle the campaign.

> **NOTE:** If your office has assigned staff to handle messages tied to an issue code, their names will automatically appear on this field.

e. **Suggestions:** This is a link to a Form Letter that IQ is recommending to use for the campaign. The result is based on previous campaign and message entries in IQ. Selecting the link will automatically apply the Form Letter to the campaign.

f. **Letter Name:** This field will be automatically populate if a Form Letter that has been suggested is selected. Otherwise, select a Form Letter from the available options.

g. **New Letter:** If a new Form Letter is required for this campaign, check the box and type a new Form Letter title. This creates a draft version of a new Form Letter. After clicking out of this field, these options will display:

☐ New Letter ☐ Remove Letter
Approved 🔍

Click on the drop box next to Letter Name and you will get a list of all active Form Letters for your office. You can select one of these or simply type in the title of the Form Letter you are searching for

h. **Batch Change**

○ No Change ○ All Active Unlocked ◉ My Active Unlocked ○ Add New ○ Remove Current

- **No Change:** Select this to indicate that all current and future messages associated with the campaign will not be added to a batch.

- **All Active Unlocked:** Select this to indicate that you want to select a batch name from an existing list. Thus, all current and future messages associated with the campaign will be added to this batch.

- **My Active Unlocked:** Select this to indicate that you want to select a batch name from a list that have been created are assigned to you. Thus, all current and future messages associated with the campaign will be added to this batch.

- **Add New:** Select this to create a new batch.

  NOTE: IQ may recommend a title for the new batch based on the Form Letter selected for the Response Rule.

- **Remove Current:** Select this to remove current messages associated with the campaign from any existing batch.

6. Select **Save**.

The illustration below provides best practices on managing messages from a macro and micro level approach in IQ.

First, manage bill-related messages as this will allow you to also manage all the campaigns associated with a bill. Thus, you are reducing the number of campaign messages (which tend to have the highest volume of message records in IQ) at the same time.

Second, manage campaign messages by combining those that are similar in nature. Thus, you are reducing the number of campaigns to manage and to respond.

Finally, manage individual messages as these are the type of messages that have lower volume of records in IQ.

1 Bill Related Messages

1. Sort all **Bills** according to how you want to manage them (i.e. most open messages, oldest, newest, etc.).

2. Expand the information of a specific **Bill**.

3. Create a **Form Letter** for each bill position:
   - Supports
   - Opposes
   - Undecided

4. Assign the **Form Letter** according to the bill position. IQ will automatically create an active **Batch** for this bill position.

5. Expand the information of the **Batch**. Once the **Form Letter** for this batch is approved, you can use it to respond to all messages associated with this batch or bill position.

2 Campaign Messages

1. Modify the Campaign title and description, as needed.

2. Use **Analyze Text** to identify messages in the Campaign that are unique and address them appropriately.

3. Combine *campaigns that are similar in nature.

4. Set the **Response Rules** for the Campaign.

5. Enable **Auto Send** to automate your responses to all the messages in this Campaign using the **Form Letter** that you selected in your **Response Rules**.

*IQ can be configured to automatically combine campaigns that share similar text. Contact the Office IQ Consultant for this configuration.

3 Individual Messages

1. Use the **Text Filter** to find common information among the messages. A Best Practice is to filter based on **Issue Code** or **Subject**.

2. Assign those filtered messages to an existing **Batch**. Create a new Batch, if needed. When creating a **Batch**, a Best Practice is to assign a **Form Letter** to the **Batch** so you can use the **Form Letter** to respond to all the messages in the batch at all once.

Note: The **Campaign Finder** feature can be used identify individual messages that can be combined into a new campaign. This approach reduces the volume of individual messages and allows the ability to apply campaign rules and responses.

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