**Project – Special Offers -**

**Package Deals**

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**Summary:**

Project – Special Offers is the next phase in the continued development of WIME.

Over the past year, we have worked on the website, enhancing its capability, design, user experience, security and stability. A solid foundation has been laid on which to now expand marketing capabilities, attract new customers and grab more market share.

This year, we will work to introduce a flexible framework for implementing special offer capabilities for our customers.

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**Goals:**

**Marketing Goal:**

Pick up share of customers who prefer to take a package deal (group of courses) as opposed to picking individual courses. Structure it so we don’t lose money. Don’t want to offer too much where it’s just confusing. Increase revenue. Attract new customers looking for package deals. No over complication.

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**Tech Goal breakdown:**

The main push of this project is to create the capability to offer our customers special packages. In its entirety, it will involve…

* crafting the ground rules and packages for the offers/packages,
* re-tooling the website storefront display for the sale of package deals and
* checkout flow adjustments and enhancements to handle payment and usage of the packages.

The secondary push of this project is to expand our marketing on multiple fronts. These include…

* emails (regular and auto generated),
  + Marketing Emails (Mailchimp)
  + Automated Emails (System generated, Receipt, 30/60/90 day Expiration Notification)
* website enhancements,
  + Landing Page Templates for Packages
  + Marketing Blurb/Announcements locations throughout website
* Search Engine Marketing (Cardinal Path)
  + Text Ads
  + Video Ads
* Social Media lead generation and advertising
  + Banners
* Website Blog
  + Blog Articles - Capability Announcement, Package Updates.

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**Table of Contents:**

* A) Types of Special Offers Packages
  + Special Offers Packages/Discounts Details
  + Special Offers rules
* B) Implementation of Special Offers Packages
  + Development Tasks
  + Flow – (Purchase > Tracking > Use)
* C) Marketing of Special Offers
  + Marketing – Website Related
  + Marketing – Email (Regular)
  + Marketing – Email (Auto Generated)
  + Marketing – Social Media
  + Marketing – Video
  + Marketing – SEM/SEO
  + Marketing – B2B Marketing

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**A) Types of Special Offers Packages**

**Summary:**

This is to lay the groundwork for the structure of any special offers, packages, discounts, coupons, etc. I have summarized at a 10000 ft level the different groupings of offers we have discussed/documented so far. We can choose the type of packages we want to create and discard the rest of the suggestions.

**Special Offers Packages/Discounts Details:**

1. Package of CEU hours at a discount
   1. Eg: Take any 30 CH and save 15%
2. Package of courses that are related
   1. By State –
      1. Eg: FL Package Nurses (Domestic Violence for FL $20, HIV/AIDS for FL 4 CH $40, Prevention of Med. Errors for FL $20) ($55 for all)
   2. By Specialized Job –
      1. Eg: Telephone Nursing Package. (Telephone Triage $24, COPD $35, Stroke A Comprehensive Review $45) ($99 for all)
3. ~~Buy X get Y off Package~~
   1. ~~Eg: Buy 2, get 1 at 20%. Buy two 6,7, or 8 CH courses, receive a third one of the same CH at a 20% discount.~~
4. ~~Seasonal Specials (All courses discounted, coupon codes)~~
   1. ~~Eg: Offers at Christmas, Thanksgiving, 4~~~~th~~ ~~of July~~
5. ~~Personalized Special offers~~
   1. ~~Eg: After account registration.~~
   2. ~~Eg: After 1, 2, 3~~~~rd~~ ~~course completion, offer 10%, 10%, 20%.~~
   3. ~~Eg: Birthday Limited time discount code.~~
   4. ~~Eg: Refer a friend Limited time discount code.~~
6. ~~Pay with tweet/facebook post (Instead of current free course)~~
   1. ~~Eg: Offer course in exchange for tweet/facebook post. Prepopulate widget with our sales info.~~
7. ~~Advanced – Create your own package.~~

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**Special Offers Packages rules:**

1. Course packages cannot be combined with any other offers, LTOs or codes.
2. Some offers should be one time only, such as the New Member ones.
3. Offers should be pre-pay, credit card online or phone only. No checks or money orders for packages.
4. There should be a time limit how long the offer is valid. Courses should be picked at time of purchase.
5. No refunds on purchased and unused packages

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**B) Implementation of Special Offers Packages**

**Summary:**

This section reviews the necessary flow and backend organization and structure that will be necessary to lay the groundwork to implement a functional Special Offers capability on the website.

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**Development Tasks:**

1. Database table design
   1. Key table entries
   2. Offer Naming conventions
2. Bridge between SOMS and CMS
   1. SOMS and CMS must interact to update course list pages, package details and landing page links.
3. New Checkout flow for Package Purchase.
4. New Customer Service flow in SCI system for Reps to deal with customer problems with packages (refunds, adjustments, etc)
5. New CAI (Customer Account Interface) flow for customers to review purchased package details.
6. New Email flow to send receipts for purchase packages and reminders for package expiration dates.
7. Portals Directory Reworked
   1. Sub-directory structure
   2. File naming convention

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**User Task Flows:**

**Employee Flow – (Setup Package > Choose Courses > Setup Landing Page > Make Live)**

1. Setup Package in SOMS (Special Offers Management System)
   1. Name Package (Unique Name)
   2. Set details (Price, Date Active/Sale Ends/Package Expires, url)
   3. Choose Courses
2. Setup Landing Page on website
3. Make package live for purchase by customers.

**Customer Flow – (Purchase > Tracking > Use)**

1. Purchasing a Special Offer Package
   1. To buy the package, the customer goes from Landing Page to checkout to confirmation page to customer accounts interface (CAI) page.
2. Tracking/Information of Special Offers Packages for customers
   1. Customer Account Interface (CAI) is expanded to include an extra page. This is dedicated to summarizing special offer details.
   2. Details Included: Special Offer/Package titles, courses contained, offer expiration dates, discounted prices, Packages/Courses consumed.
3. Using a Special Offer Package
   1. To use a special offer, simply take the course and register. At registration you will be notified that you are going to use your special offer and a summary of the details of the related special offer. Rest is normal.

NOTE: Please review ‘Special Offers Flows’ to see a detailed flowchart of each step.

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**C) Marketing of Special Offers**

**Summary:**

Here, we review all aspects of marketing that we will used to propagate our new Special Offers Package capability. The size and scope of each of these can vary greatly.

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**Marketing – Website Related**

1. Landing Pages
   1. General: Review design and create additional templates
   2. Types of LPs
      1. ( X – Properly Designed ) Package deals Homepage (All offers)
      2. Single LP w details
2. Website Banners
   1. Homepage
3. Unique Layouts and design for each Profession Homepage
   1. Paula said ‘In order to have google properly index each profession page, we need to differentiate each a lot.’ So along with content, we need a different infra-structure and grid and layout and design for each profession page.
4. Personalized Homepage Carousel OR Personalized Homepages.
   1. Redesign to include a general area for Offers, News, Announcements, etc
   2. Personalized by where you are coming from (Geo-location)
5. Blog
6. Newsletter sign-up improvements
   1. Flow/Page design
   2. Website placement
   3. Improved security
   4. Confirmation page enhance (see Ann email for suggestions)
7. Institute Hotjar Customer rating widget/Poll/Survey

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**Marketing – Email (Regular)**

1. General Tasks
   1. Review current design (use more ASCII text, less image text)
   2. Segmentation of email lists
      1. By profession
      2. By Corporate Customers
   3. Research Personalization of emails (customer name, etc)
2. Types of Emails
   1. Monthly Emails (LTO, Newsletter, Reminder)
   2. Special Event Emails (Occasion, Event)
   3. Course Announcements (New course, Updated course)
   4. Corporate Customers emails (Anthem)

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**Marketing – Email (Auto Generated)**

1. General Tasks
   1. How to implement auto generated emails? Use current system? Expand to Mailchimp?
      1. Use current system. Custom built. Expand to include packages.
2. Types of emails
   1. Course Package Receipt
   2. Course Package purchased nears expiration

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**Marketing – Social Media**

1. Social Share buttons added to website
2. Social Media Images
   1. Special offers Packages
   2. Informational
   3. Emotional
   4. Funny
   5. New Courses Announcements
3. Giveaway competition (Prize is branded merchandize (shopping bag or coffee mug))
4. ~~Pay with tweet/facebook post (Instead of current free course)~~
   1. ~~Eg: Offer course in exchange for tweet/facebook post. Prepopulate widget with our sales info.~~

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**Marketing – Video**

1. Video Ads on Youtube
2. Youtube Channel
   1. New Course descriptions
   2. Video tutorial of website usage
   3. Customer testimonials
3. Webinars
   1. Anthem Guide

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**Marketing – SEM/SEO**

1. Landing Pages for SEM
   1. Redo Landing Pages from Old versions
2. Banners for SEM
   1. Customer Match Ads
3. Re-Design the Display ads

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**Marketing – Corporate Customers Marketing**

1. ~~Plan Exclusive Special Offers for Corporate Customers~~
2. Separate email lists for Corporate Customers related customers
3. Separate emails highlighting information about our updates
4. ~~Special Print Package Mailer for Corporate Customers outreach (Can also be converted into a mini-site)~~

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**Final Thoughts:**

After our initial discussion on the project details, I created this document.

In this document, I have laid the 10000ft view of the project and listed in its entirety all aspects linked to this project. Please review and confirm details.

The next step will be to explore in greater detail each step of the Development Tasks and User Task Flows (See B) Implementation of Special Offers Packages, Development Tasks and User Task Flows).

I will work on creating these technical diagrams and will follow up with a meeting time to review them.