Apteco

Streamline your campaigns with Apteco Orbit

Your step-by-step guide to broadcasting and orchestrating automated journeys

Intelligent campaign building with Apteco Orbit

Learn how to orchestrate every part of your campaign to deliver the right message, to the perfect audience, via the right channel, at the ideal time.

- Select and refine your perfect audience
- Build multi-stage, multi-channel journeys
- Include and exclude audiences and apply limits
- Add personalisation
- Automate and broadcast campaigns
- Save, edit and publish
- Monitor campaign performance
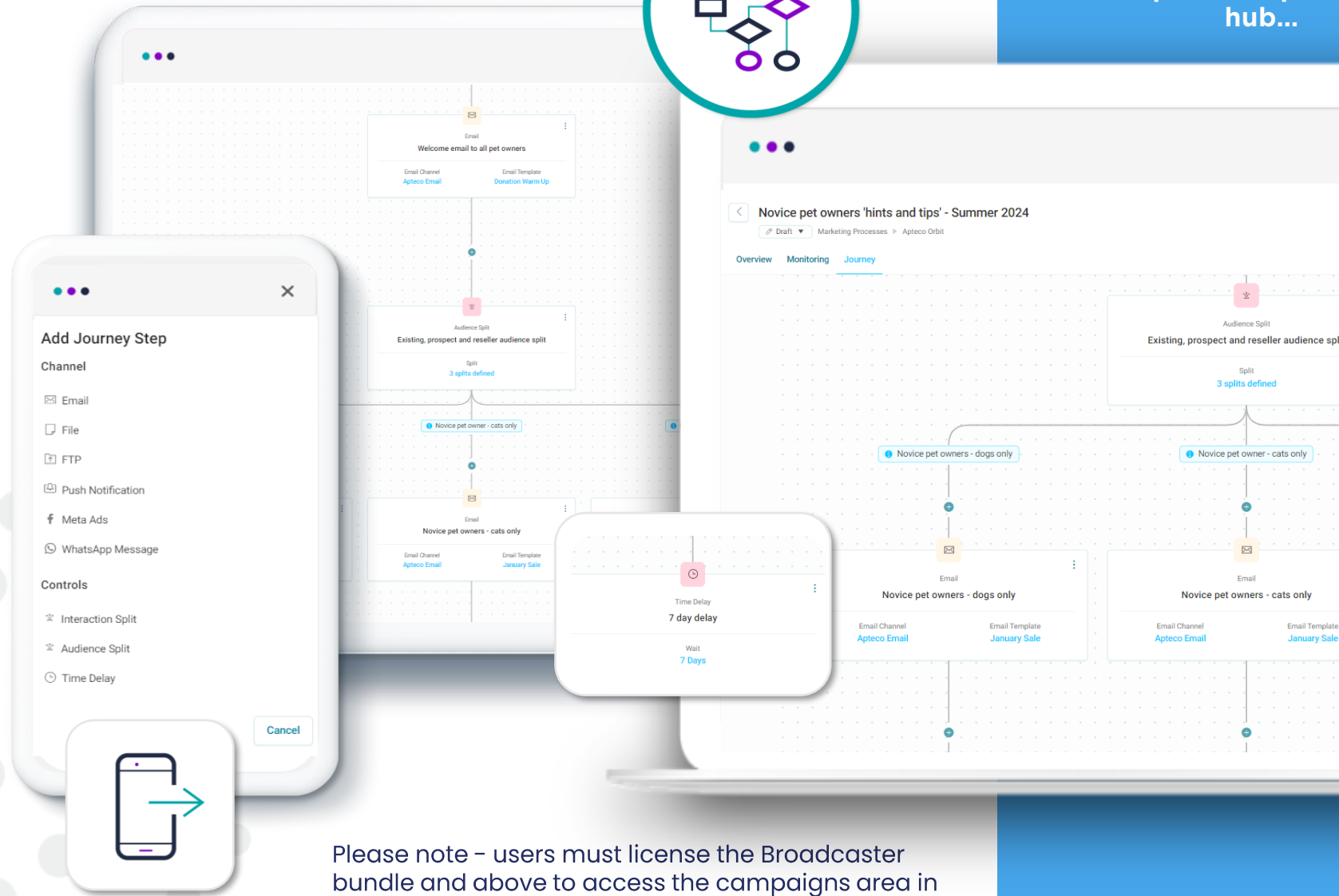
Visit **apteco.com** for practical help in the Apteco help hub...

Please note - users must license the Broadcaster bundle and above to access the campaigns area in Apteco Orbit. Learn more about our **pricing bundles**

Orchestrate all your campaigns in Apteco Orbit

Connect your data and channels, extract actionable insights to build and refine your ideal target audience, then personalise your messages and automate and monitor your multi-stage, multi-channel campaigns – all from one platform.

Personalise

Personalise content fields to create communications your audience will love.

Automate

Set triggers based on specific interactions, time delays between communications and schedule your campaigns to run like clockwork.

Target

Extract actionable insights to refine and build your ideal target audience.

Monitor

Monitor your campaign outcomes to act fast and deliver more positive outcomes.

With Apteco Orbit you can schedule and automate all your regular campaigns:

Lead nurturing

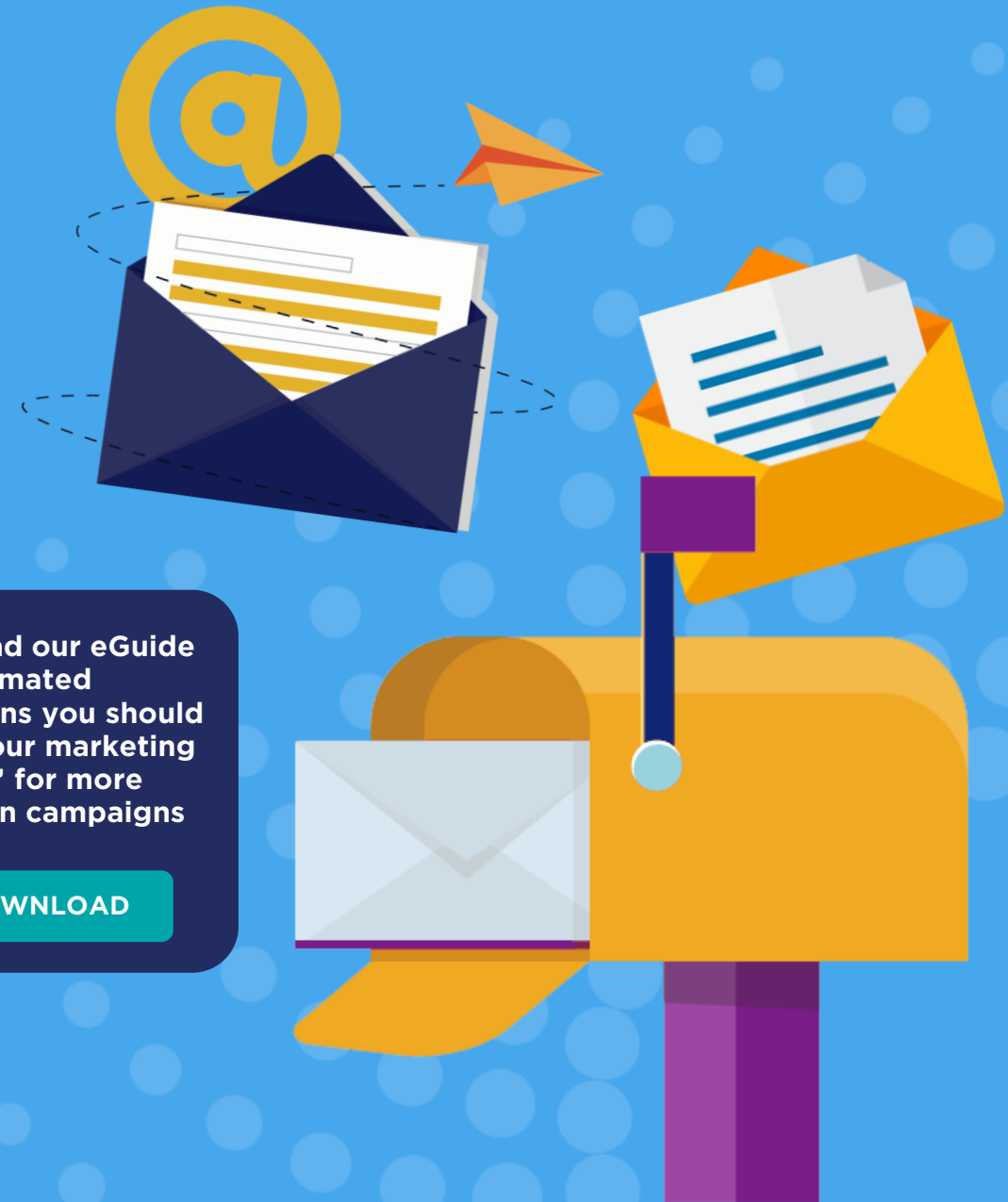**Newsletters**

Re-engagement campaigns

Welcome campaigns

Promotional campaigns

Rewards / loyalty

Download our eGuide '10 Automated campaigns you should use in your marketing strategy' for more advice on campaigns

DOWNLOAD

Step #1

Define your perfect audience

It all starts with your data

Successful marketing campaigns start by defining your ideal target audience from your data. Apteco Orbit makes it easy to create targeted segments and action your data insights immediately in your campaigns - driving positive outcomes.

Start your campaign by making visual audience selections directly from dashboard visualisations. Apteco's beautiful branded dashboards help you to analyse and explore your data in minutes and our powerful, interactive visualisations let you and your teams filter and drill down into your data for immediate insight.

Or create a new list by segmenting and building your list in the Apteco Orbit audiences tool by applying inclusions and exclusions.
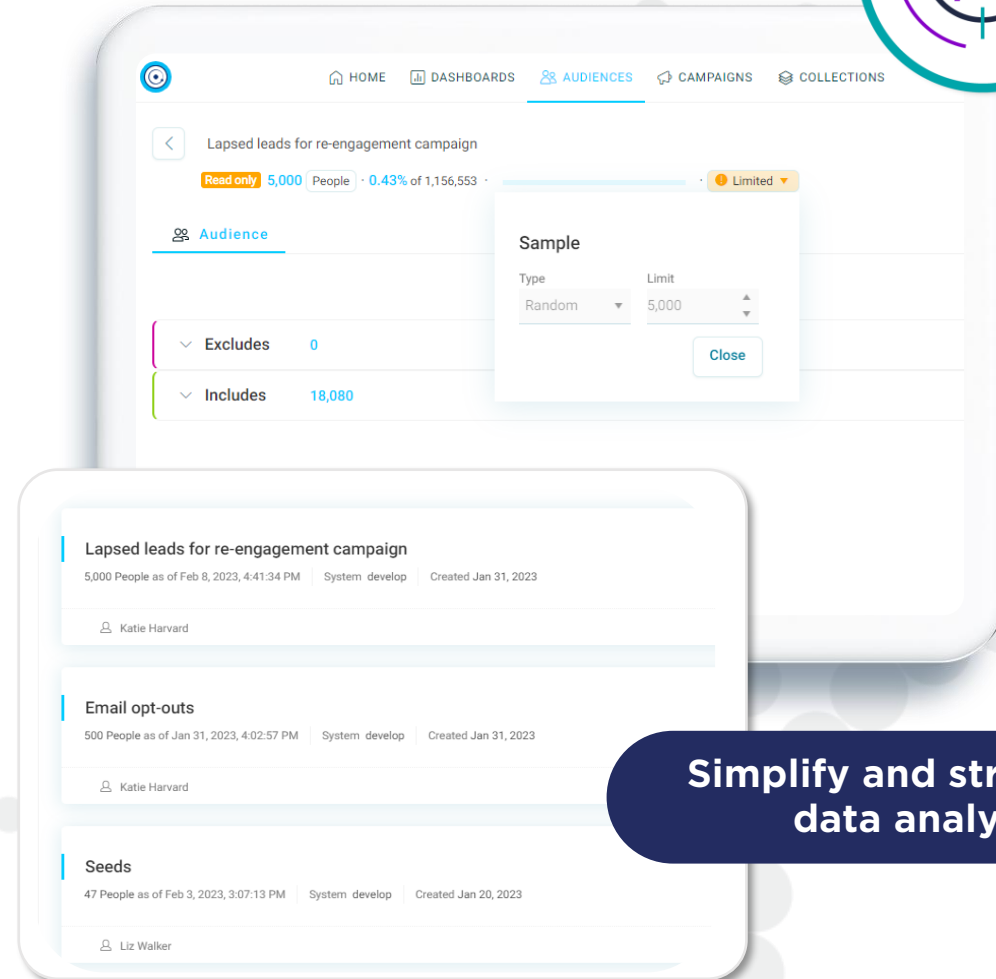
Simplify and streamline data analysis
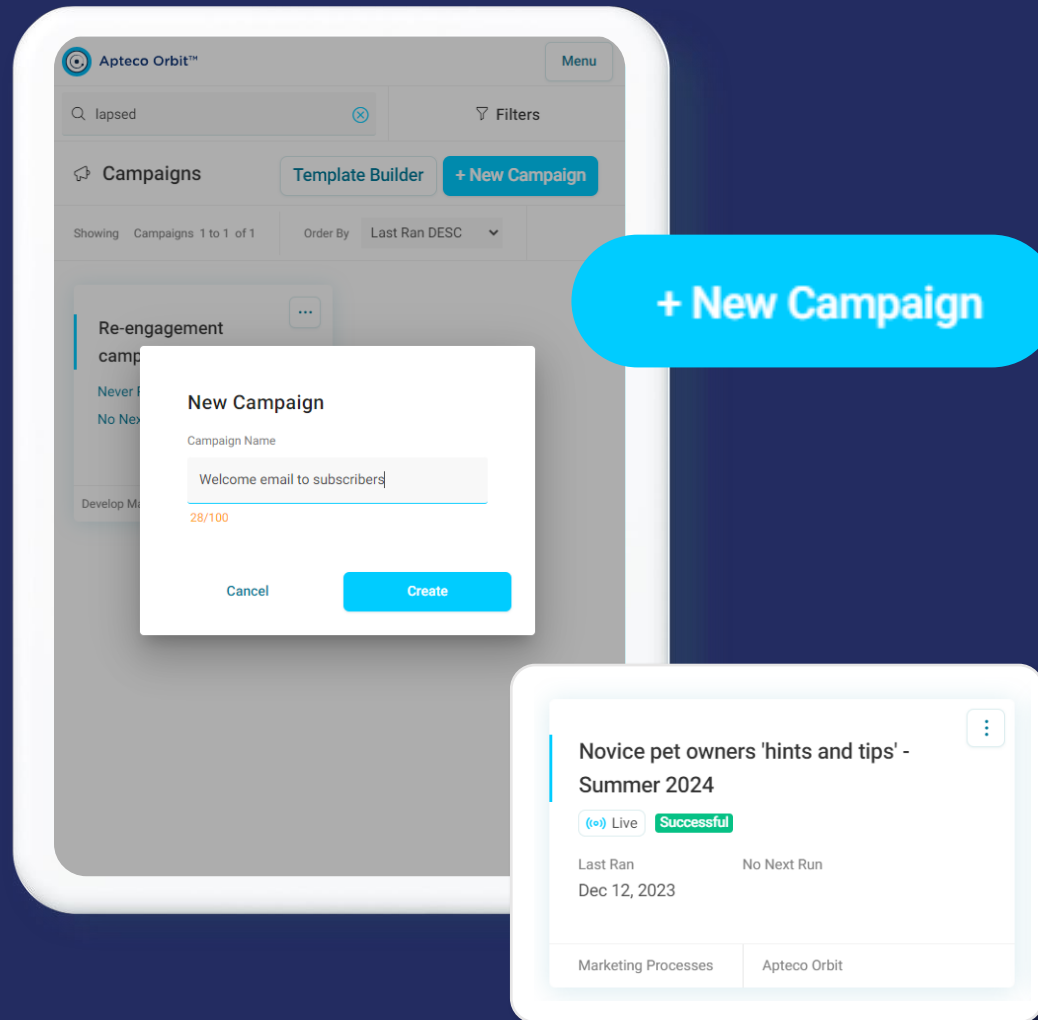
Create a new campaign

Building a new campaign couldn't be easier!

Click on the '+ New Campaign' button, give your new campaign a name and that's it!

Your campaign will open in 'edit mode', which means that you are in control of the campaign and no one else can make any changes while you are editing it.

Your new campaign will then be added to the 'campaign dashboard', where you can use search filters to easily locate it.

The campaign dashboard will also display important details like the last run date and any error or success messages.

Add your audience

Easily add an audience list, multiple audiences or exclusions to your campaign

Adding audiences to your campaign is simple. Just click 'add audience' and the editing panel on the left-hand side will open. You can then select multiple audiences with the include and exclude functionality.

The 'including' section will automatically de-dupe (remove duplicates) and you can conveniently move your audiences up and down the list, to establish which audience segment has priority.

Both gross and net counts are updated and displayed at audience level, segment level and journey builder summary level.

Add precise audience segments

Step #4

Set audience limits

Set quantity and percentage limits by segment or campaign

Budget and resource constraints mean that marketers often need the ability to apply limits to campaign volumes.

With Apteco Orbit quantity limits can easily be set for the whole campaign, or at audience segment level and can also be applied per run for recurring campaigns that are scheduled per day, week, month and so on.

Percentage limits can also be applied in a similar way using a random sample of the data. This is particularly beneficial where the exact quantity is not known, but where you wish to select a subset of the audience for testing. Percentage limits can be applied per run but are not available for recurring schedules.

Achieve more predictable results

Full funnel campaigns

Orchestrate the perfect journey

Build and manage multi-stage, multi-channel journeys

Once you've created your perfect target audience you can use it immediately to start building your campaign journey. With Apteco's journey builder you can orchestrate and trigger single and multi-stage campaigns to engage with customers via multiple touchpoints through the full funnel.

Automate multi-channel communications via your favourite channels, including email, Meta ads – Facebook and Instagram, WhatsApp messaging and offline options to handle your traditional fulfillment needs, such as sending data to your call centre or mailing house.
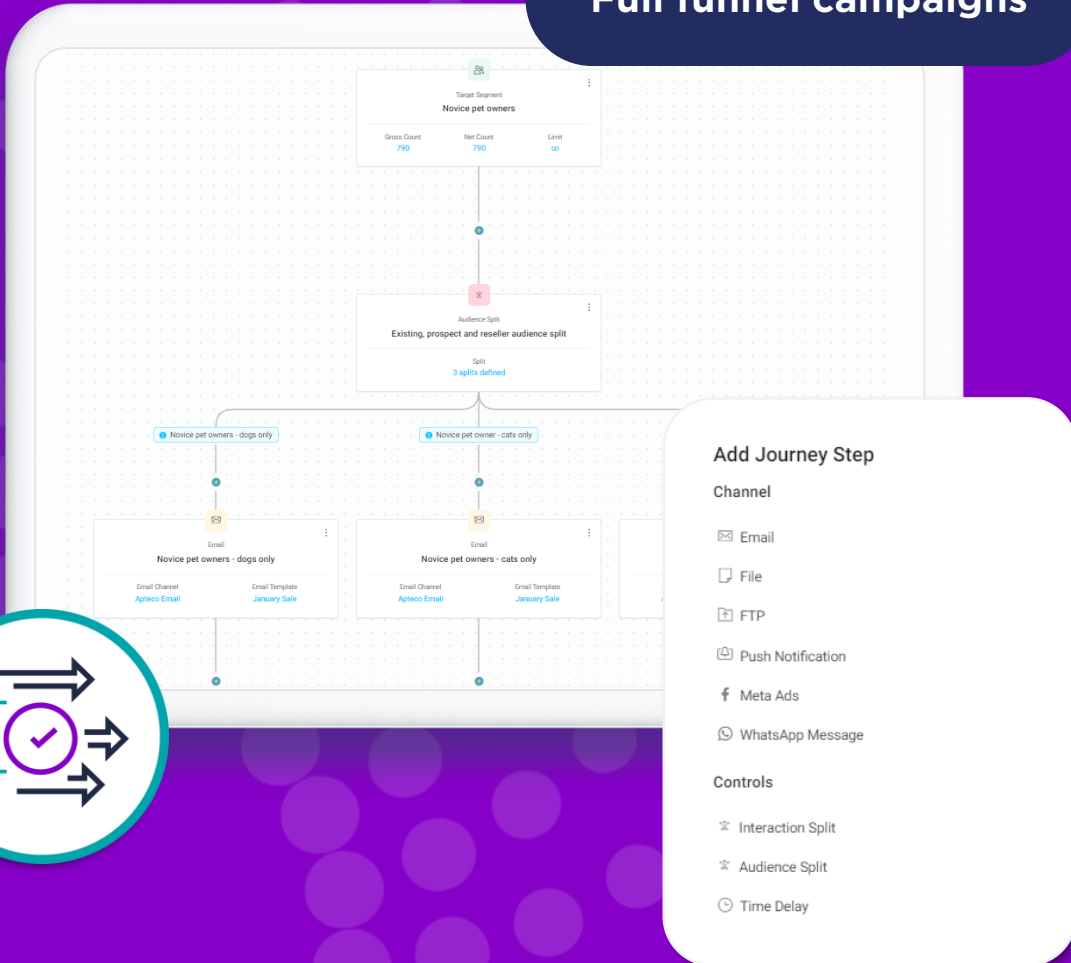
Design beautiful emails

## Build personalised engaging emails in our embedded email builder

Seamlessly move from interrogating your data and creating highly targeted audiences, to building personalised, responsive emails that turn your customer insights into campaign actions and results.

Our email builder provides a secure and reliable delivery platform, or you can choose to broadcast through your preferred ESP from our comprehensive list of integrations.

Apteco is perfect for all levels of email creators. You can start from scratch, upload your own layouts, or select from a variety of pre-designed templates, where you can create and deliver beautiful emails using flexible drag-and-drop functionality.
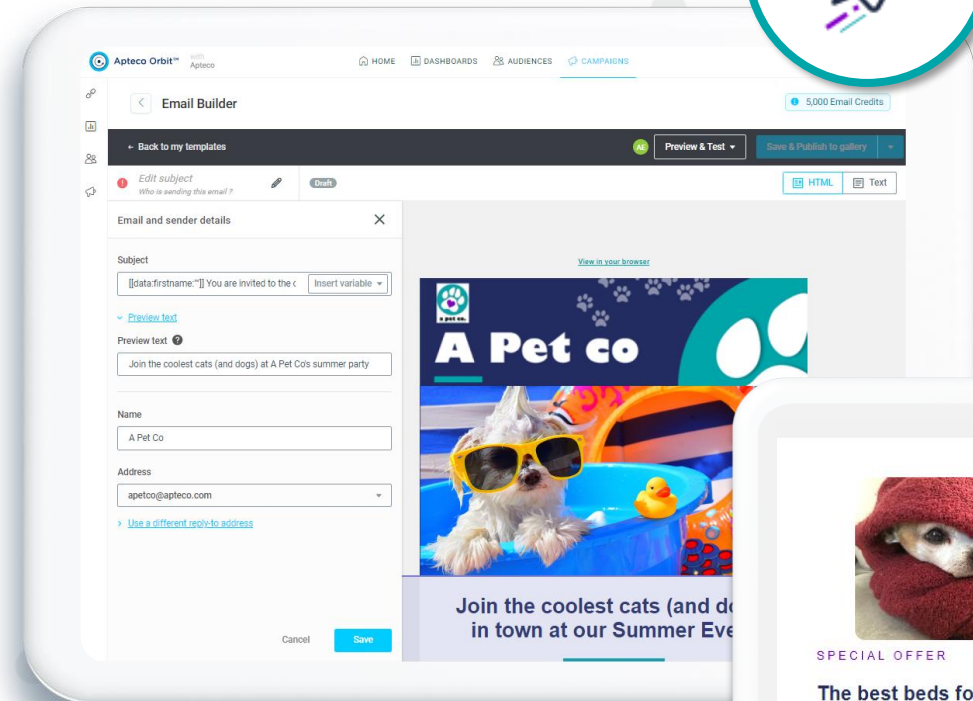
Embedded email builder

Step #7

Let's make it personal
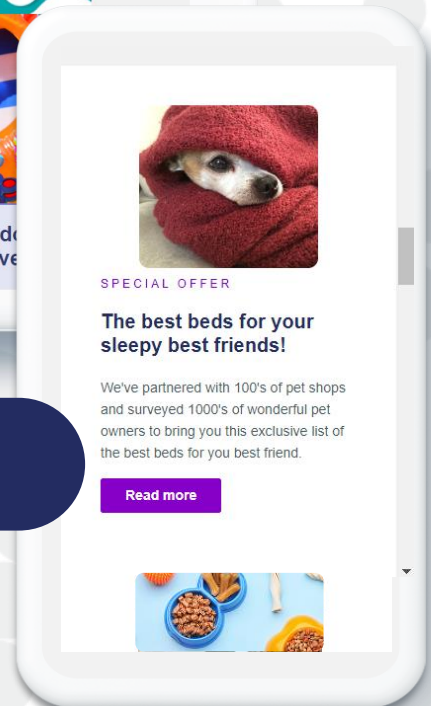
Adding personalisation

Create personalised communications your audience will love

It's more important than ever for marketers to ensure that their communications and interactions with customers are personal and relevant. In the editing panel of the journey step, you can add text fields and variables to personalise your content.

Add text fields such as voucher or mailing codes, job or campaign numbers and codes or flags to every record in your data output. Alternatively add variables from your database that are unique to each customer record, such as customer segment, model score, date of birth, last product purchased, date of last purchase or drive time, to ensure that every customer journey is unique and relevant to each individual customer.

Step #8

Automate your journeys

Save time and avoid manual processes

Your campaign can be conveniently scheduled to run at a set date, time, and time zone, or triggered using audience splits and interactions. This allows you to tend to other valuable tasks while your campaign runs in the background. You can also set time delays to help optimise the timing of your campaign.

To set a campaign schedule simply click 'set schedule' at the top of the journey screen. Here you can schedule a one off send or you can automate your email with a recurring schedule. Campaigns can be scheduled to run on a daily, weekly, monthly, quarterly or even yearly basis.

Interaction splits allow you to tailor your messaging based on recipient interactions – like click throughs or unsubscribes and audience splits allows you to split your audience into different segments and send each segment down different paths.

Step #9

View and edit modes

View, edit, save and publish

Keep your campaigns secure while editing and publish when it's perfect!

Apteco Orbit offers you four modes: view, edit, save and publish. While in 'view' – no changes can be made to your campaign journey. Click on 'edit' to make changes to your campaign. While the campaign is in 'edit' mode, no one else can make any changes to it.

You can 'finish editing' or 'save' your changes at any stage of the campaign. The save function will save your changes and allow you to continue editing, whereas the finish editing function saves your changes and places the campaign back in view mode.

Once your campaign is complete, and you are happy with how it is set up, click 'publish'. This will make your campaign live, so that it can run to the set schedule.
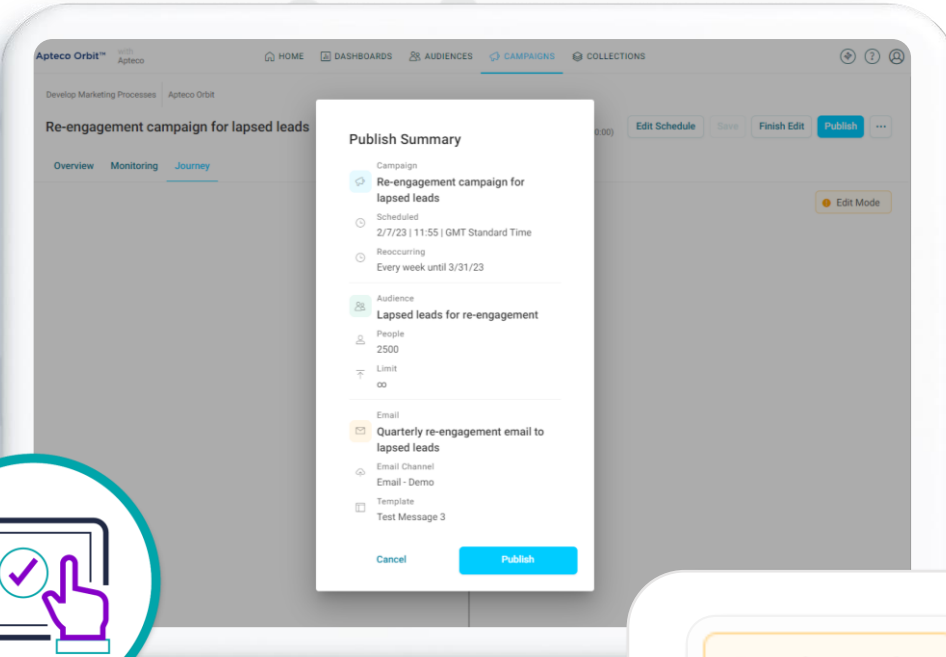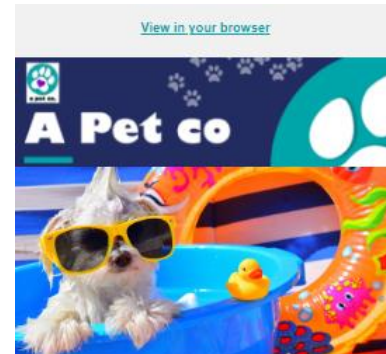
Preview and test, before you send

Feel confident your email is 100% right, before you send it

You've built a winning campaign journey, added your carefully selected audiences and applied personalisation to ensure your communications are relevant.

Now you are ready to send, and you want to double check any personalisation and make sure you are ready to publish your campaign, in order to feel confident your audience will receive the right message based on your settings.
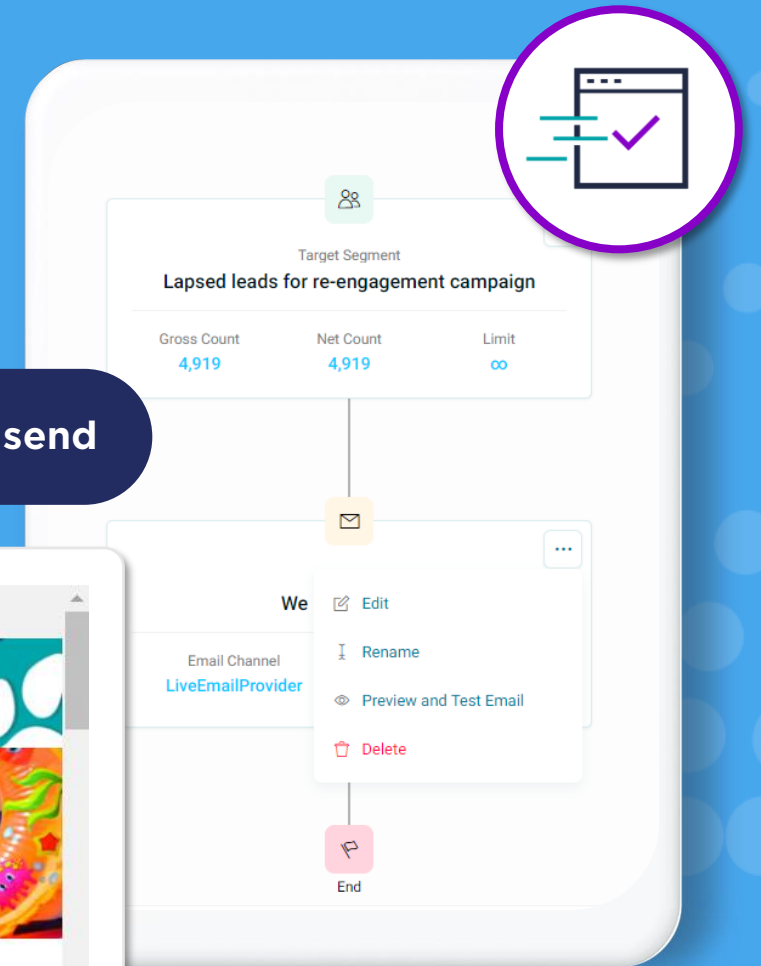
That's where our preview and test functionality comes in. You can preview your email on a mobile device, on a desktop and you can preview inboxes across multiple brands, versions, devices, and countries.

Check before you send

Target Segment
Lapsed leads for re-engagement campaign

Gross Count	Net Count	Limit
4,919	4,919	∞

Email Channel
LiveEmailProvider

Edit
Rename
Preview and Test Email
Delete

End

View in your browser

A Pet co

Join the coolest cats (and dogs) in town at our Summer Event

Send test email

Monitoring your campaigns

Get up-to-the-minute insights, as they come in

Once your campaign is running, you'll want to start monitoring it's performance to ensure you are reaching your goals. With Apteco Orbit you are able to track and monitor up-to-the-minute insights as they come in from your ESP. The campaign overview tab displays important tracking information including open and click through rates, as well as a calendar view and visualisations showing costs and channels.

You can also keep an eye on the campaign status in the 'monitoring' tab. This details the running steps of your campaign and displays any success or error messages.
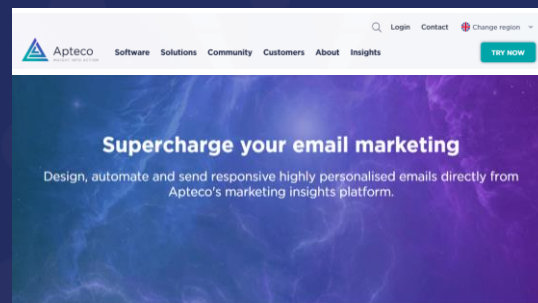
Monitor performance as it happens

Find out more

Turn insight into action – watch our Orbit platform video now
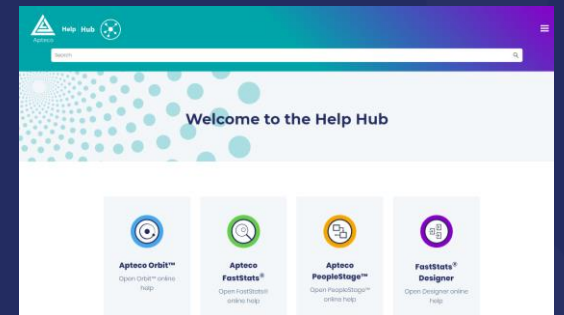
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Supercharge your marketing with Apteco email

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Learn more about campaigning in the Apteco Orbit platform

DISCOVER →

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Apteco

INSIGHT INTO ACTION

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