

Business rules for sending deliverables

Proposed new rules

Role	Print mag (default state)	Digital mag & e-newsletters	Direct mail (printed) promotion (incl Mktg Insights print nl)	Digital promotion (incl Mktg Insights e-nl)	LIP & Readex reports	Remarks
DMB ("Decision Maker's Boss")*	Yes	Yes	Varies	Yes	No	New role, see note below
Advertising Decision Maker	Yes	Yes	Yes	Yes	Yes	U.S. and Canadian only. Limit 2 ADMs per company. For PW, "print mag" includes Showcase and all supplements.
Advertising influencer	No**	Yes	No	Yes	No	No longer receives print mag. Now unlimited.
Digital content recipient ***	No**	Yes	No	No	No	No longer receives print mag. Unlimited.

** Note 1: Unlike the current process, where you have to opt out people of receiving the magazine, under this process, for anyone with a "No" in the above table would by default NOT get the print magazine as a business rule. But now sales reps would have the ability to opt someone "in" to receiving a print magazine by checking a box for each individual brand. (Eliminate ALL the opt out fields *except* keep the 5 opt out fields for people who automatically receive print, and create 5 opt IN fields for print for everyone who does *not* automatically receive print.) Any contact with a print magazine checked will get it, even if that contact has a legacy role of Personify.

*** Note 2: No longer receives print mag. Unless they are people who the decision maker would like to receive it (key salespeople) and are opted in via new checkbox described in note 1.

Wendy and Christine preferred to rename the existing "Content recipient" to "Digital content recipient" to reinforce that by default, they do NOT receive print.

* **New checkbox: The Power!**

This is a new designation designed to identify what's typically the boss of the person who we call on who calls the ultimate shots with regard to budget, and who we often do not get to call on. In typically PMMI members, this person could be the VP Sales/Marketing or could even be the President/Owner. The purpose for this designation could be if we wanted to show special attention to these folks marketing-wise, but it also has value sales-wise, by communicating to Wendy (or others) who are on the show floor and are NOT familiar with the account, signalling who the big cheese is. It also has value by allowing us to create reports of what % of accounts, by rep, is there a big cheese even identified. Note, we may choose to send print promotion to this person, depending on what we are trying to accomplish. For example, we might want the prototype of Game Plan or Facilities & Infrastructure directory to go to these people for sure.

Technical note: While Advertising Decision Maker, Advertising Influencer and Digital content recipient would all remain as roles in the Contact type menu, "The Power" would be handled as a separate checkbox to avoid messing with our heavily automated integration. Note: We would retire the "C-suite" role in the secondary contact type field.

We should discuss whether this individual should receive the print version of Sarah's Marketing Insights newsletter (probably?). Digital for sure.

Reports to

Not really pertinent to business rules but related, we'll start having reps take advantage of the new "Reports to" field by indicating relationships of who reports to whom.

Mundo

We would keep Mundo Advertising Decision Maker and Mundo Advertising Influencer.

Role	Mundo e-newsletters	Digital promotion	Remarks
Advertising Decision Maker - Mundo	Yes	Yes	Someone marked with this designation would ONLY receive Mundo e-newsletters and Digital promotion and would NOT receive anything related to our other brands. But someone marked with our regular brands WOULD receive Mundo e-newsletters and digital promotion.

Advertising influencer - Mundo	Yes	Yes	While there is no distinction here from a marketing or comp list between this role and the decision maker, Wendy would like to preserve this for sales purposes. Important for the salesperson to be able to distinguish the ADM from the AI.
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Print magazine opt out

We would keep print magazine opt out at the contact level in case there is an advertising decision maker who does NOT want to receive a certain brand. The use case we have in mind is Powers and, say, Leo, calling on the same company, and Leo calls on a packaging guy and Powers calls on an automation guy. We would do away with all the other opt outs (digital edition, promotion, etc.)