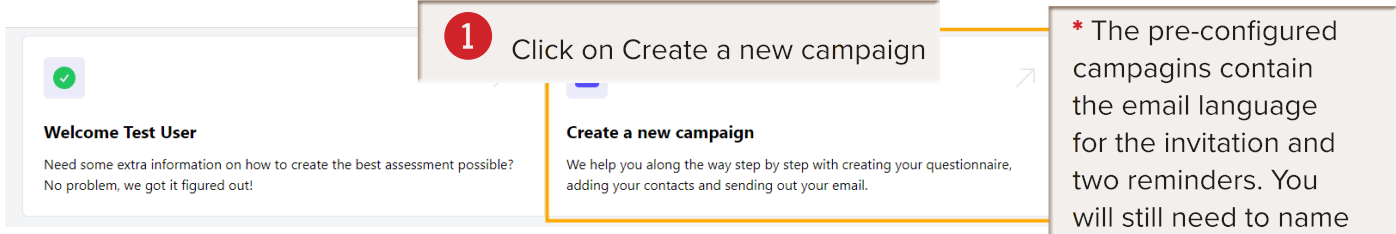# QUICK START GUIDE - Sending out assessments
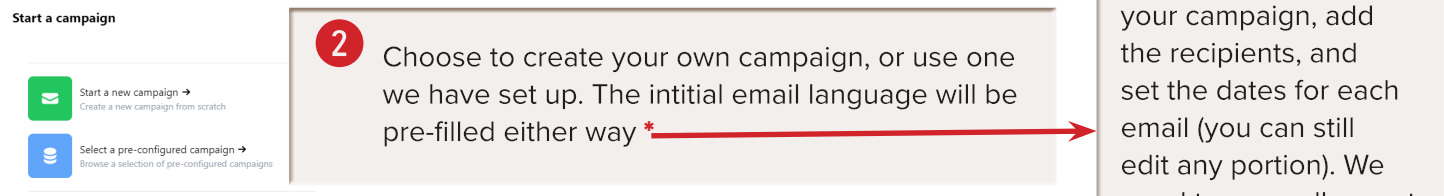
This guide assumes that you have created your PointerPro account. If you have not, contact us at sales@effectivenessinstitute.com and let us know your preferrred email address for this account.

1 Click on Create a new campaign

✓ Welcome Test User
Need some extra information on how to create the best assessment possible? No problem, we got it figured out!

Create a new campaign
We help you along the way step by step with creating your questionnaire, adding your contacts and sending out your email.
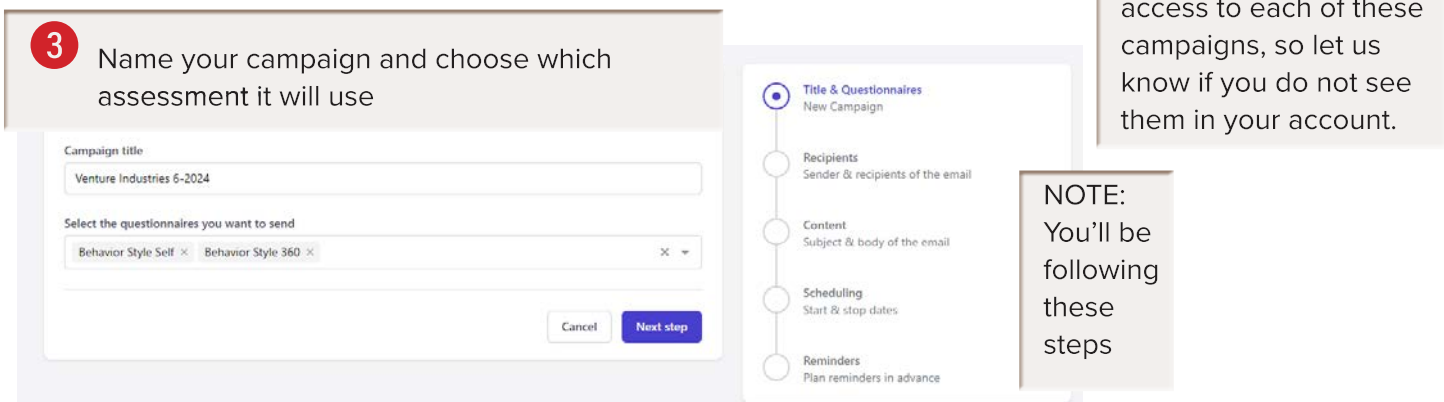
* The pre-configured campagins contain the email language for the invitation and two reminders. You will still need to name your campaign, add the recipients, and set the dates for each email (you can still edit any portion). We need to manually grant access to each of these campaigns, so let us know if you do not see them in your account.

Start a campaign

✉ Start a new campaign →
Create a new campaign from scratch

🗄 Select a pre-configured campaign →
Browse a selection of pre-configured campaigns

2 Choose to create your own campaign, or use one we have set up. The intitial email language will be pre-filled either way *****

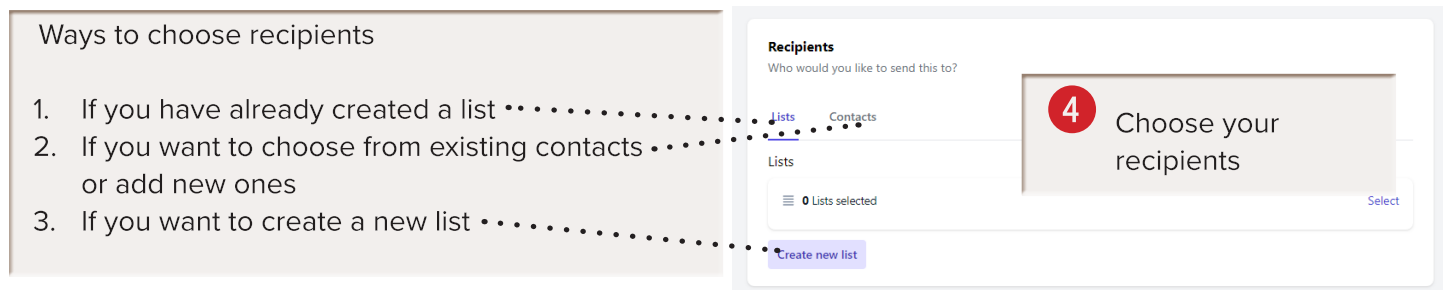**3** Name your campaign and choose which assessment it will use

Campaign title

Venture Industries 6-2024

Select the questionnaires you want to send

Behavior Style Self ✕   Behavior Style 360 ✕   ✕ ▾

Cancel   **Next step**

⦿ **Title & Questionnaires**
New Campaign

○ **Recipients**
Sender & recipients of the email

○ **Content**
Subject & body of the email

○ **Scheduling**
Start & stop dates

○ **Reminders**
Plan reminders in advance

NOTE: You'll be following these steps

Ways to choose recipients

1. If you have already created a list ⋯⋯
2. If you want to choose from existing contacts ⋯⋯ or add new ones
3. If you want to create a new list ⋯⋯

Recipients
Who would you like to send this to?

Lists   Contacts

Lists

☰ 0 Lists selected   Select

Create new list

4 Choose your recipients

👥 Add contacts manually →
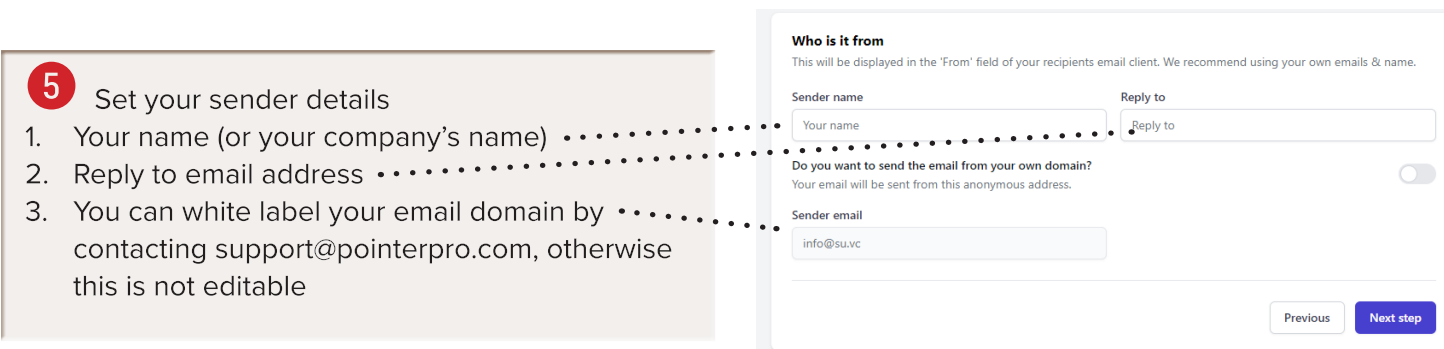You can fill in the contact's first & last name, email address and add them to the

📄 Upload a .CSV file →
Import multiple contacts by uploading a .CSV file.

You can import your list by uploading a CSV file, which you can find **here**

Be sure to save your file as a CSV

5 Set your sender details

1. Your name (or your company's name) ⋯⋯
2. Reply to email address ⋯⋯
3. You can white label your email domain by ⋯⋯ contacting support@pointerpro.com, otherwise this is not editable

Who is it from
This will be displayed in the 'From' field of your recipients email client. We recommend using your own emails & name.

Sender name   Reply to

Your name   Reply to

Do you want to send the email from your own domain?   ◯
Your email will be sent from this anonymous address.

Sender email

info@su.vc

Previous   **Next step**

Email
This is the email that your recipients will receive

Subject line

Behavior Style Self assessment invitation

Email content

B I U A A↕ ≡ ≣ ∞ {x} 𝕏 <> ⤢

Here is the link to your Behavior Style Self assessment. Answer the questions to identify your primary and secondary behavior style preferences, and gain insight in ways to generate more productive communication.

To get started, click on the link below or copy and paste the link into your internet browser. Don't forget to save your results by clicking on the download button on the last screen.

Do not share this link -- it is unique to you and may be used only once.

Questions or technical assistance? Please email contact@effectivenessinstitute.com.

|clickable_link_unique_id|

The email pre-populates depending on the assessment you chose in step 1.

You can edit everything except the final line - *|clickable_link_unique_id|*

NOTE: If you plan to schedule reminders, we suggest copying the body of the email to use there.

When would you like to start the campaign and send
Emails are sent out on an hourly schedule.

○ **Send as soon as possible**

● **Schedule later**
Set up a schedule to send your campaign at a specific date and time

Scheduled date   **Time**

2024-05-07   09:00 ⌃⌄

When would you like your campaign to end?
A the end of your campaign, links in the email will be disabled and unused invitations will be credited to your account.

End date   **Time**

                                                            00:00 ⌃⌄

NOTE: Emails always go out at the top of the hour, so if you choose "Send as soon as possible" at 9:15, for example, the email will go at at 10:00.

You must choose an end date for your campaign. Users will not be able access the assessment after this date.

Reminder #1   ● Draft
You can schedule a reminder to your recipients, this will send an email to remind them of your campaign.

○ **One week**
Your recipients receive an email with a reminder after 7 days after sending your campaign

○ **One month**
Your recipients receive an email with a reminder on the same day 1 month after sending your campaign

● **Select my own date**
Select your own date & time when your recipients will receive an email with a reminder

Scheduled date   **Time**

2024-05-07   09:00 ⌃⌄

Send the reminder to

Contacts who didn't respond yet   ⌃⌄

8   Schedule reminders (cont'd)

Enter a subject line & then paste the text you copied from your original email (you can go back and copy it if necessary)

You can add up to 3 reminders, but each must be created separately.

Subject line

Don't forget to take your assessment!

Email content

| B | *I* | U | **A** | A↕ | ≡ | ☰ | ⌔ | {x} | A̶ | <> | ⤢ |

Here is the link to your Behavior Style Self assessment. Answer the questions to identify your primary and secondary behavior style preferences, and gain insight in ways to generate more productive communication.

To get started, click on the link below or copy and paste the link into your internet browser. Don't forget to save your results by clicking on the download button on the last screen.

Do not share this link -- it is unique to you and may be used only once.

Questions or technical assistance? Please email contact@effectivenessinstitute.com.

|clickable_link_unique_id|

9   Scroll up to the top and click on Done (the text at the top varies depending on how you've set up your campaign).

...paign is scheduled, do you want to add reminders?

...hedule a reminder to your recipients, this will send an email to remind them of your campaign

[Previous] [**Done**]

To check the status of your campaign or to print out results, click on Campaigns at the top of the page. You will see all the campaigns you have created. Click on Results to print out reports.

Campaigns   Contacts   Questionnaires   Results

test				
Behavior Style Self - user prints	Last edit: 5/9/2024	• Scheduled	[View]	∧
Behavior Style Self - user prints				

| **Test 4-12-2024** | | | | |
| Behavior Style Self - user prints | Last edit: 4/29/2024 | • Ended | [Results] [View] | ∨ |