

Eastern Business Systems "Marketeer": User Manual

Foreword & Contents

By and Copyright © 1987
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Author's Addendum May 2004: This is the user manual of a 'legacy' software package from the mid to late 1980s. This user manual is here as an example of my work as a technical writer. However, if you are interested in the history of PC software, please feel free to download and run the software itself by right-clicking [this link](#) and selecting 'Save Target as...' or the equivalent. Unzip the download file and open the folder 'ebs_marketeer'. To start Marketeer, double-click the file "mktr.bat". The password is "password". Runs on anything from DOS 3.3 to Windows XP.....

IMPORTANT

We respectfully draw your attention to the Software Licence at the end of this book [accessible via the Contents List]. We stress particularly those clauses relating to copyright.

ABOUT THIS BOOK

This book is a complete 'hands-on' introduction to the EBS MARKETEEER Software Package. It is written as an easy-reading tuition-style narrative. Each chapter explains, and gives you some practical experience of, one of MARKETEEER'S major facilities. Thus, by the end of the book, you will have actually USED all the facilities yourself.

This book is written to a readership made up of people with vastly differing levels of knowledge and experience both in sales & marketing and in information technology. As such it has to cover absolutely everything in the detail necessary to ensure that the least knowledgeable reader in each respective field is never left out in the cold.

As a result, you will doubtless feel that in at least some parts of this book you are being told in rather over-simplistic terms that which you know already. In these events, please bear with us knowing that to some of your fellow readers these things may be entirely new. Besides, reading our explanation of something you do know establishes common ground from which you may understand more readily our explanations of the specifics of MARKETEEER which you don't already know.

Detail is always far more interesting and understandable when explained against the backdrop of a pre-established overview. That is why in this book we start with those of MARKETEEER'S facilities which help you define and monitor the precise shape and structure of your overall market, and then work downwards into those which deal with the 'nitty gritty' of the individual people and companies who make up that market.

Finally, in the last chapter, we give you some help and guidelines for setting up your own sales/marketing operation on MARKETEEER and getting it 'on the road'.

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The development & production of MARKETEEER took over 15,000 hours of human effort. This represents an enormous human and financial investment. Any attempt to reproduce this package and make that reproduction available to a third party is an attempt to steal a substantial part of that investment from its rightful owner. Because of the seriousness of such an action, EBS will, without fail, take action against any party found so doing. This manual is deemed to be part of MARKETEEER and no copy of it must be made which is separate from the MARKETEEER software, nor must the contents of any of the Manual's text files be edited.

VERSIONS

(Development first began in March 1981)
Version 1.00 - Apple II version Aug 1984
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Chapter 1: Background

WHY DO WE NEED TO SELL?

Nobody is good at everything. Each human ability does not appear equally in all of us. One person is good at some things: another person excels at others. Each of us has a somewhat unique Aptitude Profile. As producers, we are each to some degree specialists. On the other hand, we have a potential need or desire for a wide variety of human skills and products. As consumers, therefore, our needs are diverse.

Each one of us is thus a specialised producer and generalised consumer. So the only way we can equalise need and availability (supply and demand) is to trade - to exchange what we have for what we want. Trade thus enables all to benefit from the specialised skills, abilities and possessions of each. And the prime force which motivates this whole trading process is the act of selling. We must sell to survive.

WHY DO WE NEED COMPUTERS?

In my early days of prospecting for customers to buy computer systems, I approached many small businesses who would come back at me with an argument typified by the following scenario:

'Why do we need a computer? This firm has been around for four generations. It is not much bigger than it was 30 years ago and we have no desire to expand. Our products are essentially the same as they were then, and modern machinery has if anything made our production process simpler. We have never needed a computer before, why should we need one now?'

A CHANGE IN THE MARKET

These people had seriously overlooked something. Having been preoccupied with what was happening inside their enterprise, they had become oblivious to what had been taking place outside. Even if in this extreme example their business itself had not changed in 30 years, its marketplace - the economic environment within which it had to live and breathe - had undergone a total metamorphosis.

So if, unlike most companies, their enterprise has indeed neither expanded nor changed in 30 years, they may well be able to exist without a computer to help them run the inside of their business. But their marketplace - which they share with the rest of the commercial world - most certainly has both changed and expanded over the past 30 years. And if they intend to survive and succeed in today's far larger and more complex environment, they will have a hard time doing so without the help of a computer.

THE WAY IT WAS

A century ago, business was a relatively insular activity. Its skills were local, its supplies were local, its market was local. It was not much affected by happenings beyond its own local community, and certainly not by events taking place outside the nation. There was all the time in the world to assimilate new products and adapt to new technologies without fear of being left behind.

In those days, almost every enterprise was in close social and physical proximity to the local community which formed its market and of which it was itself a part. The establishment and maintenance of credibility, advertising, publicity and sales functions were all a natural by-product of local social events.

That rather parochial economy was shrouded in the protective mists of distance, time and cultural difference. Foreign competitors had no access to the home market. They had neither the means nor the strength to exploit it. They probably didn't even know it was there.

THE WAY IT IS

But the situation today is very different. Advances in telecommunications and transport technologies have laid open our home market to the world. Today, a development in California, a merger in New York, or a coup in Central Africa can reshape a distant market over night - often with drastic consequences for a business on the other side of the world.

Running a business today is thus no longer like sailing a trader sedately over the seven seas where time was measured in weeks: it is more like weaving a modern tactical combat aircraft through the thick of a transcontinental dog fight where a split second can spell the difference between life and death.

So while growing suddenly to the size of a dinosaur, today's market has at the same time gained the speed and agility of a fly.

WORLD COMPETITION

The opening up of world markets has brought with it growing competition from an ever-increasing number of competitors. In striving to maintain competitiveness within this fierce environment, companies have been forced to develop better and better techniques and apply better and better technology both to the products themselves and to the means of producing them.

AGE OF THE SPECIALIST

Advancing technology in turn demands a greater and greater depth of knowledge on the part of those who put it together and make it work. But to penetrate that greater and greater depth, each individual involved must narrow down his own field of view. He must become a specialist.

Thus the artisan who once made a complete product, and ran the entire operation which carried it from raw material to final sale, has had to give way to the technical specialist who produces only part of a more complex and sophisticated product using more advanced and cost-effective means.

A NEW APPLICATION

But while people can readily appreciate the use of technology to improve the efficiency and competitiveness of the more tangible interior of a business, it has proved far more difficult to show them how it can be used to probably greater effect in helping them to survive, navigate and succeed within the seemingly treacherous and far less tangible environment outside.

A GROWING PROBLEM

What those in our scenario were probably not admitting - or perhaps could not even see - was the ever-increasing difficulty they were having in holding onto a once-stable localised market where a sufficient number of orders trickled in merely because they were the 'established' local supplier. Now, they are increasingly having to go out and actively SELL to survive - something they are not used to.

Or perhaps, whereas two generations ago their production was distributed among a reasonable number of customers 'their own size', it is now swallowed by just one or two giants. An adverse decision by one purchasing manager could thus close them down completely. Understandably, they feel vulnerable.

ANOTHER KIND OF SPECIALIST

A business can have the best workforce in the world. It can employ the best technology. It can have all the financial backing it needs. It can be producing humanity's most vital need. It can have the most able management. But unless it can sell what it produces, all is in vain. The sales order is the point at which all a business's life processes begin.

Thus in today's complex and competitive world, it is upon another kind of specialist - the salesman - that the survival and success of a business increasingly rests. The best product in the world will not sell itself. It must be sold by those able to explain its virtues, establish its credibility and close an order. These are essentially human skills which the salesman must have.

THE MORE MUNDANE ASPECT

But for the human communication or social aspect of the salesman's job to be effective, it must be supported and backed up by another more mundane aspect of his job.

Before he is ever in a position to apply his social skills, the salesman must first know who his prospects are and where to find them. He must plan a campaign of approaches geared to yielding the maximum possible number of orders. This more mechanical aspect of the sales/marketing task does not rely on social skills, but more on an ability to record, organise and retrieve information.

IT'S THE MARKET: NOT THE ENTERPRISE

Contrary to what many people think, the size & complexity of this aspect of the salesman's job has little to do with the size & complexity of his company: it is to do with the size & complexity of his market. As competitors from afar infiltrate his once-sacred local patch, he must cast his own net further afield. And the size & complexity of his sales/marketing task grows - whether or not his company grows along with it.

It is also to do with the product. As a product becomes more sophisticated, its market becomes more specialised and thus includes less prospects per head of population. This fact also requires that the salesman cast his net further afield in order to catch enough prospects to yield an acceptable number of final sales. This in turn means that he must pass details of more prospects through his sieve in order to end up with a sufficiently large and adequately tuned 'hit list'.

A SUPERHUMAN TASK

So the salesman of today has to cover a county-wide, region-wide, nationwide or even worldwide field. Obviously, he cannot socialise with each of such a large number of prospects. Nor can he rely on the chance social meeting as the means of initiating and maintaining contact.

He needs to ensure that regular contact with a large number of carefully profiled prospects is packed efficiently into a full and exacting schedule. But under such weight of numbers and under such stringent timing, it is easy for the salesman, during a flurry of activity stirring in one corner of his field, to overlook and offensively neglect important prospects in another.

And because of the instant person to person access afforded by the modern telephone network, the salesman today can easily be put on the spot when confronted by a caller whose name and surrounding circumstances he cannot instantly bring to mind. There are so many to remember, yet they must all be treated and humoured almost as intimate friends. This aspect of the salesman's task is thus becoming more and more superhuman.

TECHNOLOGY HAS HELPED OTHERS

The captain of the ancient trader could easily keep track of where he was. Aided by no more than a compass, sextant and charts, his own mind and hands were more than able in both speed and dexterity to plot a new course for his sailing ship.

But what of the fighter pilot spotting an ominous radar blip at 1000 miles and knowing that within 20 minutes he will be no more than a puff of smoke unless he can lay in a complex evasive manoeuvre that will take him four hours to work out? Clearly, he cannot rely on his own ability alone using passive instruments guided by his own mind and hands.

He needs instant high-technology help from sophisticated devices which will, at the touch of a button, throw his aircraft automatically into a precisely computed evasion trajectory while at the same time unleashing a retaliatory weapon system to destroy his non-human adversary.

Naturally, each step for calculating that evasive manoeuvre had to be pre-programmed into the aircraft's flight computer by its human designers. But they were merely solving a theoretical flight control problem in the relative comfort of their laboratory with all the time they needed: not facing death at the hand of a missile.

TECHNOLOGY CAN HELP THE SALESMAN

As the fighter pilot, so too can the salesman be helped by technology. Technology cannot replace the salesman's social skills. A computer can never persuade the customer to buy. But it leaves him standing in speed and precision when it comes to sorting, organizing and extracting the myriad facts he must keep on the prospects which make up his ever-growing and ever-changing market.

MARKETEER is the salesman's flight computer. It is an integrated system of computer programs which operate on his personal computer or sales department network to take these more mundane and mechanical aspects of his job off his shoulders so that he can spend the time thus saved face to face with his prospects. MARKETEER does not itself attempt to control the salesman's market for him. It simply provides him with the precise information he needs to enable him to control his reactions to his market so that those reactions are to a larger extent calculated rather than being solely intuitive.

A TECHNICAL CHALLENGE

Ten years ago, inspired by a keen interest in business as a vital part of the social order, I applied the principles and disciplines of science and technology to develop a 'systems' MODEL of the Trading Process. This MODEL took the form of a generalised Trading Unit (a typical business, firm or company) set within a generalised Market Environment (the local, national or world economy).

The MODEL maps the active elements of the Trading Process and simulates the flow of cash and resources between them. It forms the basis for the design of a complete range of business software whose function is to monitor events in every part of that Process as they happen, and present the businessman with the precise information he needs to steer his enterprise successfully and profitably within today's highly-interactive and competitive world of commerce.

With engineering clarity and precision, the MODEL reveals that the only way the financial side of a business is linked to its physical or operations side is through its outside market. This makes the market the central or focal element of the whole Process. It is also the largest and most complex element. It is the one which presents the businessman with his greatest challenge and the one over which he has the least control.

That is why I took up the challenge of researching, developing and perfecting a powerful software aid to cover this central component of the Trading Process - an area so far largely neglected and unexploited by the software industry. MARKETEEER is the result, Version 1 of which was completed in 1981.

Development continued and during 1986 and 1987 Marketeer's software was completely re-written in the form of data-driven finite-state machines. This technique gave the software an ideal internal structure which was flexible, readily adaptable and inherently multi-tasking. Now, after a total investment of over 15,000 man-hours, Marketeer has reached Version 4 which allows multi-user operation on a PC network.

SUMMARY

Marketeer is a computer software package which automates the organization and methods aspect of marketing and selling by helping you to:

- Identify and define systematically your particular market as a niche within the UK economy.
- Build up and maintain information on up to 32,765 real and potential customers and suppliers.
- Classify these customers and suppliers in terms of your market definition.
- Specify the commercial profile of your ideal prospect for any particular sales, marketing or purchasing exercise.
- Extract a shortlist of prospects from the people & companies you have previously stored in Marketeer's database who fit the profile.
- Actively communicate with them either as isolated individuals or collectively as members of an extracted target group.
- Watch the changing statistical structure of your market as it grows and develops.

MARKETEER allows you to communicate with your market by direct mail, telephone, telex, fax and electronic mail. All necessary communications software is included. Marketeer also allows you to transmit and receive messages to and from remote computer equipment by telephone line, through which it also gives you access to public databases and electronic bulletin boards.

Marketeer's complete operating instructions are contained within the software, those relevant at any point in a program being directly accessible by a single key stroke.

Marketeer runs on an IBM PC XT or AT personal computer equipped with at least 512k RAM running DOS 3.3 or later, a 360k floppy disk drive, a 20Mb fixed disk, the IBM Color/Graphics Adapter and Color Display, an internal clock/calendar expansion board and the special internal modem provided for data communications and telephone auto-dialling. Also required is a 15-inch wide draft quality printer with tractor feed capable of 8.25, 10 and 16.5 character per inch print and a correspondence quality printer with A4 auto sheet feeder capable of 10 character per inch type. Marketeer will also run on IBM PS/2 Models 30 and 35 and certain network installations as a multi-user system.

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Chapter 2: System Overview

WHAT MARKETEEER IS

MARKETEER is a computer software package which helps you establish, develop and maintain a U.K. Market - whether or not you actually have a base in the United Kingdom. Although primarily for those involved in trade-to-trade selling, it is equally useful to anybody who needs to maintain regular communication with a significant number of people, companies or organizations.

WHAT MARKETEEER DOES

Firstly, MARKETEEER helps you to partition the United Kingdom into a set of sales areas specially tailored to your operation and then to identify and record those qualities which define precisely your market within them. In so doing MARKETEEER itself becomes a systematic model of those aspects of the United Kingdom which constitute your market.

Secondly, upon this framework, it enables you to build up the details of individual prospects as they emerge, and then to select, extract, organise and contact those relevant to each sales/marketing exercise. It thus helps you to identify, seek out and hit any specified target sector of your market on demand.

MARKETEER IS FRIENDLY

The design of the way in which MARKETEEER converses with you has been handled as a completely separate task from the design of its internal functions. So while the skills of the systems analyst and the programmer were employed in producing the software, the layout and content of screen displays and printed reports were developed by an experienced technical communicator.

The result is that all MARKETEEER'S operating instructions are carried on-screen. It employs English command words to control program functions. It gives explicit instructions and error messages in plain English. It keeps you informed as to all your options at each user-response point. It displays messages letting you know what the computer is doing during all significant processing delays.

DIVIDING UP THE U.K.

MARKETEER allows you to define sales areas to suit your operation in terms of the standard Post Office postcodes. You simply mark out the sales areas you wish to use on a Bartholomew's postcode key map of the United Kingdom by drawing around sections of appropriate post area boundaries. Because they are based on population and transport criteria, post areas are ideal building bricks for sales areas.

To set up your sales areas on MARKETEEER, you type in the two-letter codes shown on the map for each post area you wish to include in each of your sales areas. You may define up to 18 sales areas covering as much or as little of the United Kingdom as you wish. Each sales area may contain up to 100 post areas.

Once you have set up your sales areas, MARKETEEER allows you to display them on your computer screen. You can display each sales area alone on an outline map of the United Kingdom,

or if you have a colour monitor, you can show them all together, each in its own allocated colour. This facility is of great value when planning or reviewing your sales areas, and for confirming that you have specified them correctly. If several people are involved in the exercise, it is helpful to repeat the display on a video projector.

DEFINING YOUR MARKET

In setting up your sales areas you have already defined one aspect or dimension of your market - the geographic one.

But there are four other aspects or 'dimensions' to your 'market model'. These relate to the range of trading relationships which may exist between you and the corporate entities which make up your market; the various stages through which those relationships may evolve; the range of event-types through which you choose to classify your interaction with your prospects, and the range of products or services you supply.

Each dimension of the market model is represented within MARKETEEER by a database-type 'key'. However, the way in which each of these keys is handled differs and is somewhat more involved than those in a general-purpose database. Each key can be given up to 18 possible 'values', each of which is represented by plain English words chosen by the user.

The number 18 has been determined ideal for providing sufficient variety while small enough to avert the confusion caused by the natural tendency to over-classify. MARKETEEER is supplied with a full set of sample values for each key already installed. You are free to edit or replace these as you wish.

RECORDING PROSPECT DETAILS

The flesh on the bones of the market model is the name, address, telephone & telex numbers, name & title of contact, ad hoc comments, and key values which MARKETEEER enables you to enter, update and hold for each prospect.

In addition to the keys already mentioned, there are other keys which rationalise the alphabetic placing of each prospect's name within your prospect lists; the geographic placing of his address within your sales areas; the kind of business he is in; and the dates of the latest actual and next planned interactions between you. It is the key values held for each prospect which facilitate the automatic selection, organization and extraction of the candidates for a targeted sales/marketing exercise.

The key which alone determines the sales area to which a prospect belongs is his postcode. So even if you re-define the boundaries of all your sales areas completely after having placed hundreds of prospects on-file, each prospect will fall automatically into his correct NEW sales area without any alteration being made to the details in his record.

A prospect's line of business is specified as a Government 4-digit Standard Industrial Classification number (SIC) which is also stored as a key value within his record.

Marketeer also allows you to maintain an automatically date stamped rolling diary of notes detailing the 12 most recent events which have occurred or are planned for each prospect.

The total collection of data which relates to a single prospect is called a 'prospect record'. The various parts of this record exist within the database as entries in a number of different disk files to permit the fast searching and sorting necessary for MARKETEER to perform its tasks efficiently. But to the user, they all appear together as a single entity.

RETRIEVING PROSPECT DETAILS

MARKETEER allows you to retrieve an individual prospect's record for display, amendment or deletion by entering his name, his postcode or his reference number. A reference number is a unique number which MARKETEER allocates to a prospect at the time his details are first entered. That same number is made available to a new prospect if and when the original prospect's record is ever deleted.

Having accessed a prospect by name, you may scan forwards or backwards alphabetically through your 'file' from that prospect. If you access him by postcode, you may scan forwards or backwards in postcode order to geographically adjacent prospects. If you access a prospect by reference number, you may scan forwards or backwards through your 'file' in reference number order.

Furthermore, MARKETEER allows you to link up various prospect entries by means of cross-referencing chains. Thus, once you have recalled the details of a certain prospect onto the screen, you can then scan along a cross-reference chain recalling in turn all other prospects with whom your first prospect has some kind of special relationship.

MARKETEER'S referencing system is designed so that its 'database' storage extends beyond its computer media out into a system of physical drop files housed in conventional filing cabinets. This allows correspondence and other paper-borne information to be included as part of MARKETEER'S database.

MARKET STATISTICS

So that you may constantly monitor the state of your market, MARKETEER provides reports on various market statistics which can be displayed or printed.

Each statistics report lists all the possible values for one aspect or dimension of your market as represented by the appropriate key. Against each value is shown the number of prospects currently on file holding that value. Next to that is shown the same thing expressed as a percentage of all the prospects currently on file. For example, the report could show the geographic statistics of your market as the number and percentage of prospects located in each sales area.

As an alternative to the 'tabular' statistics reports, the same information is also displayed as high-resolution graphics bar charts. Furthermore, the 'prospect population' and 'total population' of each sales area are shown as 'percentage' bar charts which appear as part of the sales area map displays mentioned earlier.

SETTING UP A TARGET

You may choose to direct a particular sales/marketing campaign at your entire prospective market. However, it is more usual to aim such a campaign at a specific sector of your market - for example, a sector you wish to open up for the first time, or one you wish to re-vitalise because of falling sales. Such a sector is referred to as a TARGET.

By definition, a target comprises prospects whose business profiles or classifications make them specially suited to your campaign. A prospect's classification is determined by the values he holds for each key. To enable MARKETEEER to identify and select these ideal prospects from all those it has on file, you need to specify a 'target profile'. A target profile consists of a limited set of values for each key.

A target profile thus admits to the target group only those prospects who are in certain lines of business; who have only certain potential trading relationships with you; who are currently only at certain stages of 'development'; whom you last contacted only in certain situations; who are in the market for only certain of your products, and who reside only in a certain area. Of course, you only apply as many of these restrictions as you need for a given target: you don't have to use all of them.

The lines of business included in a target profile are specified as a set of SIC numbers. Each classification included may be specified as a 1, 2, 3 or 4 digit number depending on how narrow or how wide you want the classification to be.

Any exchange between you and a prospect is called an 'event'. The dates of the latest and next planned events for each prospect are held as key values in his record. MARKETEEER always uses 'today' as the point of reference from which it views events. The market model thus in effect moves through time along with you, giving you a view of all the events within your market relative to the present. This makes time itself a selection key which you can use to help specify a target profile.

The time element of a target profile is one of a choice of 9 different 'time windows' whose structures are determined by whether an included prospect's latest or next planned event be past, present or future; and whether or not that past or future be bounded by a cut-off time. This allows you, for example, to restrict your target group to prospects you have contacted within the past month, or those you are scheduled to visit within the next fortnight.

As it seeks out and extracts the prospects who fit your target profile, MARKETEEER, according to your request, will present them in alphabetic order, reference number order, alphabetic order within post area, alphabetic order within post district, alphabetic order within post sector, or in straight postcode order.

CONTACTING YOUR TARGET

MARKETEEER provides you with a diversity of media through which you can make and maintain effective contact with the target groups within your market.

- Sales Letters

MARKETEEER has a well equipped word processing sub-system designed specifically for writing and presenting sales letters. A number of text frames, each of up to about 200 words capacity, can be written, stored, retrieved or deleted. A sales letter is produced by specifying which of the available frames it is to comprise and in what order.

Certain frames can thus be kept as standard paragraphs while others are written specially for a particular mailshot. The appropriate frames are then combined to produce a perfectly tailored sales letter for each occasion.

Full on-screen editing functions such as push-along text insertion and paragraph-shrink text deletion are provided. Letters can be addressed to individually retrieved prospects, to specially profiled target groups, or to everybody on file. MARKETEEER similarly produces sets of separate mailing labels.

- Telephone

Instead of sending a sales letter - or indeed as a prelude or follow-up to a sales letter - MARKETEEER allows you to telephone prospects automatically in target group sequence from the telephone numbers stored in their records. Call sessions can thus be organised as calls to individually retrieved prospects, to specially profiled target groups, or to everybody on file. Automatic dialling of each call is invoked by entering the DIAL command or by pressing the equivalent function key. The on-board autodialler then connects the call for you.

- Electronic Mail & Telex

Instead of printing sales letters for posting, MARKETEEER provides an alternative of sending them by electronic mail via the Public Switched Telephone Network. This does require that the recipients be subscribers to the appropriate public electronic mail service. However, all existing telex users can be reached in this way.

- Representatives

MARKETEEER prints details of the prospects within a target group. If you limit a target group to those prospects falling within a certain sales area, then a printout listed in alphabetic order makes an ideal working list for the sales rep responsible for that area. Listed in postcode order within post area, it forms an ideal minimum mileage visiting list.

If you apply a time restriction to your rep's target so that it includes, say, only those of his prospects whom he is due to visit during the next, say, 14 days, it becomes, in effect, a moving diary which automatically provides him with his schedule for the coming fortnight.

As well as their obvious use for addressing mail pieces as mentioned earlier, MARKETEEER'S mailing labels can be used to produce instant up to date profiled card indices which can be used independently of the computer. You make them simply by sticking the labels onto blank index cards. These indices can help a rep quickly find and update details of his prospects.

COMMUNICATIONS

In addition to the automatic electronic mail facility mentioned earlier, Marketeer also includes an intelligent communication terminal function with a facility for automatically logging on to chosen electronic mail and other Value Added Network Services such as public databases and electronic billboards.

In addition to normal keyboard to screen communication over the telephone network, Marketeer's terminal also allows you to send a chosen letter or message from the Letter Library and to receive up to 40 incoming messages into a Received Messages Library in which they may be viewed or printed off-line later.

OPERATING INSTRUCTIONS

All operating instructions for MARKETEEER are carried on-board, ie; you can display full instructions telling you how to proceed from any point in the program simply by typing 'HELP' or by pressing the HELP function key. Furthermore, a half screen of explanatory text covering each item on each of MARKETEEER'S selection menus is displayed by scanning up and down the menu to the desired item using the vertical cursor control keys.

In view of this, the remainder of this book - except from the short chapter on CONFIGURATION - is devoted not to showing you how to operate MARKETEEER, but rather on how you may best and most effectively apply it to your sales/marketing task.

EVENT RECORDING

The date of every phone call, letter and telex expedited by MARKETEEER is automatically recorded in the recipient's prospect record. It is also printed - along with other relevant information - on session reports for mailshots, telesales sessions and telex shots. In the case of telexes and phone calls, the time of the call or transmission is also recorded.

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Chapter 3: Requirements

ESSENTIAL EQUIPMENT

To run MARKETEEER, you need:

1. an IBM Personal Computer XT with IBM Color Display and Keyboard,
2. a 15-inch fast draft-quality printer with tractor feed capable of 8.25, 10 & 16.5 chr/inch print sizes,
3. a 10 chr/inch letter quality printer or typewriter with auto sheet feeder.

The computer must have 256k RAM on its motherboard and be fitted with an IBM Color/Graphics Adapter, an AST Six-Pak-Plus or equivalent expansion board and a 20Mb fixed disk. If both printers have parallel ports, then an extra parallel port must also be fitted. The Six-Pak-Plus must be equipped with 128k RAM bringing the computer's total RAM to 512k. This board also provides the serial or parallel port for the second printer and a permanent date & time reference.

IBM PC/AT or IBM PS/2 MODELS may also be used, but in this book we refer only to the XT for clarity. (PS/2 Models with Micro Channel Architecture [MCA] currently require an external modem.)

The computer should have the Disk Operating System software (DOS 3.3 or later) installed on its fixed disk.

You also need a telephone. This should be of the type suitable for use on extension circuits so that its bell won't tinkle while the modem's autodialler is operating. The telephone should preferably have a jack outlet in which to plug a telephone headset. A headset is recommended for intensive telesales work as it leaves the user's hands free for operating the computer keyboard and for writing notes.

ADDITIONAL ITEMS

In addition to the actual equipment, you need a copy of the HMSO booklet 'STANDARD INDUSTRIAL CLASSIFICATION Revised 1980', the Post Office booklet 'USING POSTCODES IN BUSINESS SYSTEMS', and a Bartholomew's postcode key map of the United Kingdom. A wall mounted write-on/wipe-off plastic laminated version of the map is preferable.

COMPATIBLES

There is no reason why you should not use a so-called 'compatible' computer made by another manufacturer to run MARKETEEER. However, while many 'compatibles' will run MARKETEEER perfectly, there are many that do not. Any true 'compatible' should run MARKETEEER. It must, however, be up to you to ensure that the 'compatible' you buy will in fact run MARKETEEER.

Some 'compatibles' have what is called 'colour compatible monochrome' graphics. They have green or amber monochrome screens which reproduce colours as different patterns of shading. These give an excellent presentation of MARKETEEER which may in the long run be less fatiguing on the eyes than colour screens. However, one popular 'colour compatible' monochrome PC was found to be unsuitable for running MARKETEEER because it would not reproduce one of the essential colours. Again, check before you buy.

OPTIONAL EQUIPMENT

Whenever more than one person needs to view the screen displays produced by MARKETEEER, it is strongly recommended that a video projector be used instead of having crowds of people squinting at the computer's own small video display screen. A projector is especially valuable when you wish to show your current market statistics or sales area maps at a sales or marketing planning meeting. The projector should accept RGB or composite video input.

MAINS SUPPLY

The computer, its colour display, and the two printers each need a mains electricity supply. This requires 4 mains outlets. Since none of these items takes very much electricity they can be safely supplied via an 4-way socket strip fed from a single mains outlet. If your mains is subject to high voltage transients, the socket strip must be fed via a 'power cleaner' or uninterruptible power supply unit.

THE PRINTERS

MARKETEER produces listings and reports which can be quite long and which are often needed in a hurry. To avoid long frustrating waits and to ensure reliable service, a fast draft-quality printer with a 15 inch platen width is required.

MARKETEER also produces high quality 'front line' sales letters which are sent out to customers and prospects. In this area, first impressions count. Nothing but the best in print quality can be accepted. And the printing must be done on single sheet high quality company note paper. A dot matrix printer using continuous stationery is not suitable for this. This role is far better played by a low speed daisy wheel automatic typewriter which can print letters of the required quality. The typewriter must be able to be fitted when required with an A4 size automatic sheet feeder to allow MARKETEEER to output an entire mailshot.

When not printing sales letters for MARKETEEER, the typewriter can double as a normal office typewriter. This fact alone justifies its purchase. MARKETEEER simply needs to 'borrow' your normal office typewriter on those occasions when it needs to print a batch of high quality sales letters. MARKETEEER thus has only a minority share in the typewriter. For this reason, it is best to install the typewriter on the 'return unit' of a normal typist's desk separate from the rest of MARKETEEER'S equipment.

Before buying your printers, please ask for the list of those currently recommended for use with MARKETEEER.

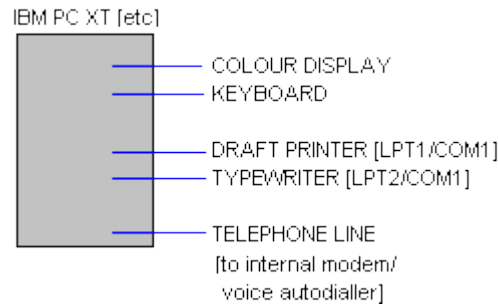
OFFICE SPACE & FURNITURE

To be comfortable, it is recommended that you allocate about 100 sq ft (9.3 sq metres) of office space specifically for MARKETEEER'S equipment and general working environment, plus the space required for one extra desk with return unit for every additional user in a network installation.

The following office furniture should be acquired specifically for MARKETEEER:

1. A large desk with return unit,
2. a robust and stable (preferably steel) 18 by 24 inch table.
3. a separate typist's desk or table,
4. MultiStor type filing cabinets to accommodate A4 folders.

The recommended arrangement of equipment on the main desk is as follows:



An additional desk and return unit is required for each additional user on a network.

The small steel table is to hold the computer and colour display. It should be located within easy reach of a telephone socket. The computer's keyboard and the telephone are conveniently located on the return unit of the main desk. The main desk itself is reserved for general working space (a vital necessity frequently overlooked when installing computer systems).

The main desk should be of the type equipped with built-in cable ducts and a power distribution strip. This will help to keep your office neat and free from the hazards of tripping over open cables.

The typewriter is located on the separate typist's table which should have accommodation for notepaper and preferably a cupboard to house the automatic sheet feeder when not in use. The draft printer should be mounted on its own stand and placed away from the desk and tables.

The MultiStor type filing cabinets should be equipped with lateral suspension files containing as many A4 wallet folders as you are likely to have prospects, and fitted out to accommodate at least one row of suspended computer printout binders.

CONSUMABLES REQUIRED

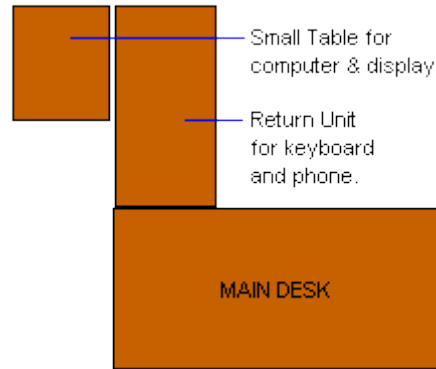
The following computer consumables are necessary before you can begin:

1. boxes of diskettes for backing up your data,
2. a box of single part 15-inch wide by 11-inch drop music ruled listing paper,
3. a box of sticky label continuous stationery with 82mm x 37mm labels arranged 4 across on 165mm wide waxed continuous backing form.

SETTING UP THE EQUIPMENT

Please unpack each item of equipment and do any assembly work necessary as directed in the respective instruction manuals. Then locate each piece of equipment in its permanent position in the room. Mount the draft printer on its recommended floor stand, then load it with 15 inch music ruled listing paper ready for use.

The way the peripheral devices should be connected to the computer is shown in the following diagram. Connect them up referring to the computer's installation manual and the manual of each respective device for detailed procedures. Ignore references to the modem if this has not yet been installed inside the computer. This will be dealt with in the next chapter.



PRELIMINARY TESTS

Test the computer, colour display, printer and typewriter according to the tests given in the respective manuals including the running of the computer's diagnostic tests. Once you are satisfied that each device is working correctly, switch off all the devices and disconnect them all from the mains supply. You are now ready to install MARKETEEER.

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Chapter 4: Installation**IMPORTANT**

To install Marketeer yourself, you should know how to install PC expansion boards and be familiar with DOS and printer control codes. If you are installing Marketeer on a network, you should also be familiar with the appropriate network operating system. It is assumed that the necessary equipment for running MARKETEEER has been set up as described in the previous chapter.

The modem used by Marketeer is a Dacom ADM10 internal expansion card modem. Alternatively, you may use an external version, the DSL2123H connected to the COM2 serial port. Currently [DECEMBER 1988] the DSL2123H is required for PS/2 Models 40 and above.

INSTALLING THE MODEM

Unplug the computer and its peripheral devices from the mains. Unscrew the five large bolts on the back of the PC and slide the cover forwards to remove it, taking care not to snag any internal cables. Find a spare expansion slot for the modem and remove the dummy metal strip in the back panel of the PC relating to the spare slot. Do this by removing the retaining bolt at the top of the strip and sliding the strip upwards.

It may be necessary to leave another empty slot next to the one where the modem is installed because the cover of the modem's line termination circuits may be in danger of touching the solder side of an expansion board in the next slot. It is illegal to remove the modem's line termination circuits cover.

Pass the modem's telephone line cord from inside the PC through the new opening in the PC back panel and then insert the modem into the spare slot taking care to locate the modem's bottom edge connector correctly into the slot on the PC mother board. The metal strip on the back edge of the modem will then line up to form part of the PC back panel. Bolt the modem in place with the bolt used to retain the original piece of back panel. Replace the PC's cover and secure it with its five bolts.

NOTE: In a network of PC's each PC used to run Marketeer must have a Marketeer modem installed in order for the software to work.

Connect the modem's line cord in parallel with your desk telephone. You will need a line splitter if your line socket is not a double one. Your telephone should be of the type designed for use on extension circuits otherwise its bell will tinkle when the modem autodialler is dialling a call.

LOADING THE SOFTWARE

Your dealer has probably set up DOS and other system & utility software on your fixed disk (Drive C) prior to delivery. Please switch on the computer and wait for it to complete its self-test procedure. If the system software has been installed already on the fixed disk, then on completion of the self-test procedure, a DOS software copyright and version notice will appear on the screen. At the end you will see the drive letter, C, followed by the DOS prompt character and the cursor. If you do not see this, please consult your dealer or refer to the DOS manual on how to install DOS on your fixed disk. For network installations, consult the network operating system manual also.

Assuming DOS has been installed and is working, and the C: prompt is displayed, make sure you are in the root directory (or the directory containing DOS if different). Then enter and execute the DOS command:

```
\RESTORE A: C:\ /S
```

Feed in the disks in numbered order as requested by the DOS Restore utility. Then copy the file MKT1.BAT from the directory MKT1 to your root directory. This will allow you to start Marketeer by entering the command MKT1 from the root directory. You may also copy it into the AUTOEXEC.BAT file if you want MARKETEEER to start automatically when the computer is switched on.

Marketeer now resides in a multi-tier directory structure which was automatically created on your fixed disk by the Restore utility. Enter the DOS command

```
CD \MKTR
```

then display the contents of the MKTR directory by entering a DIR command. You will see that this top-level directory contains three other directories: EXE, FIXED and MANUAL containing the executable programs, the fixed data and the user manual text respectively.

Now enter the DOS command:

```
CD \MKT1
```

followed by a

```
DIR
```

command.

These are the directories which contain your data on prospects etc. The last sub-directory herein is called USER01. If you are installing MARKETEEER on a network server for multi-user working then you must replicate the contents of the USER01 directory for as many users as you require, calling the new directories USER02, USER03 and so on up to a maximum of USER40. If you attempt to log on as a user for whom a USER?? directory has not been created, Marketeer will return control to DOS. The network software must conform to DOS 3.3 or above file locking.

Whether you have a single-user or multi-user MARKETEEER, you must run the DOS utility 'SHARE' before running MARKETEEER. MARKETEEER also requires more than the default numbers of buffers and files allocated by DOS. Therefore, please add the following commands to the CONFIG.SYS file in the root directory:

```
BUFFERS=20  
FILES=20
```

(assuming these are not there already.) If these commands are already there with values => 20, then leave them as they are.

If it is not already there, add the following command to the file AUTOEXEC.BAT in the root:

```
SHARE
```

Also if you have installed Marketeer on a network, you should set file attributes as follows: All files in the EXE and FIXED directories can be set as read-only to all users but this is not essential. Files in all other directories must be read-write for all users. NOTE: The NAMCODE and POSTCODE files in the PUBLIC directory are the only files which are locked and unlocked from time to time by MARKETEEER'S software using the DOS 3.3 file locking conventions. Individual records within files are never locked separately.

STARTING UP MARKETEEER

Please ensure that you are in the root directory. Then start MARKETEEER by typing in the command MKTR. [Always hit the carriage return key after typing in a DOS command.] After a short initialization delay, MARKETEEER'S main menu appears on the screen. Below the menu is a box in which you are asked to enter your password.

PASSWORD

A 15-character field is provided for you to type-in your password with the cursor flashing over the first character position. [The cursor is the flashing line which appears on the screen whenever the computer is waiting for you to type in something. It marks the position at which whatever you type in will appear.]

The purpose of the pass word is to stop all but those people authorised to use MARKETEEER from gaining access to the information and facilities within it. A pass word acts as a kind of 'ignition' key. You may set MARKETEEER'S password to whatever you like later on.

However, upon delivery, as an example, it has been set up initially as 'PASSWORD'. So please type in the word 'PASSWORD'. If what you enter here is not a recognised password, a message appears telling you that you have been refused access. You may then attempt to enter your password again from the beginning.

Please notice that as you type in your pass word, the characters you are actually typing do not appear on the screen in place of the underscore characters. Asterisks appear instead. This is so that any unauthorised person looking at the screen cannot see what your pass word is while you are typing it in. If, while typing in your password, you think you have made a mistake, you may press the left-arrow key, the backspace key or the 'Home' key to clear the password field so you can start again. You must type-in your password correctly all in one go in order to gain access to MARKETEEER.

MARKETEEER now picks up the current date and time automatically from DOS which it displays at the top right of the screen. The correct System Time is maintained in this top right screen position while you are in MARKETEEER.

THE MAIN MENU

The password entry box is now replaced by an invitation to select one of the items from the main menu list. The main menu is the central point from which all MARKETEEER activities start. It is a display of the list of all the things that MARKETEEER does. From it you may select the one you want. You have two ways of doing this. Firstly you may hit the key on the top row of the keyboard bearing the number of the item you want to select.

Alternatively, you may scan down or up the menu by pressing the downward or upward pointing cursor control keys (arrow keys). Each time you press one of these, the next item down (or up) is highlighted and a half screen of text explaining what that item does appears on the right of the screen.

CONFIGURATION

Please scan to Option 9 by pressing the up-arrow once. Read the explanatory text on the right of the screen. You will now set up your passwords, printer ports and printer control codes. Hit the carriage return (also called the ENTER key). The Configuration Menu now appears on the screen. Use the down-arrow key to highlight each of the menu items in turn and read the explanatory text for each.

1. Password

Now return to Option 1 and hit the carriage return key. The text on the right is now replaced by a box together with instructions on how to enter passwords. The word 'PASSWORD' appears in the first position in the box. This is the password you have just used to gain access to MARKETEEER. Replace this with the password you wish to use in future.

If you are installing MARKETEEER on a network, then you must set up a separate password for each user. The first password (the one you enter in place of PASSWORD) is the supervisor's password. It alone can gain its user access to this password entry and editing facility (and to certain other facilities to be discussed in later chapters). Please allocate a password to each of the users on the network.

It is assumed here that you are the supervisor. The password used to 'log on' to MARKETEEER determines whose private data directory MARKETEEER will refer to for target information; mail, telephone & telexshot lists; sales letter texts; electronic mail subscriber data; printer information and incoming telex & electronic mail libraries.

2. Printer Ports

Please scan to Option 2 and re-read its explanatory text. Then select Option 2 by hitting the carriage return key. MARKETEEER normally uses a draft quality printer for reports, and a high quality printer for letters. Each requires an input/output (I/O) port. You can use a dual quality printer for both jobs such as a Hewlett-Packard DeskJet PLUS, in which case you still need to set up both ports which will be identical. The method of setting up the two ports is the same.

Some printers have V24 (RS232) serial interfaces and others have parallel (Centronics) interfaces. The parallel interfaces are simpler and cheaper, but if you want your printer to be usable directly with a modem as well as with the computer, then you must have a serial printer as these are the only kind that can handle communications procedures.

Your computer can have up to 2 serial ports (called COM1 and COM2) and up to 3 parallel ports (LPT1, LPT2 & LPT3). A parallel port is easy to set up. Simply type in LPT1:, LPT2: or LPT3: (don't forget the colon at the end) according to which port you wish to connect your printer. MARKETEEER allows you to add the letters LF after the colon to cause a line feed character to be sent to your printer immediately after each carriage return character.

Serial ports are more difficult to set up since you have to specify the transmission speed, parity, number of data bits and stop bits, and possibly which control signals to ignore. The printer itself must be set up to exactly the same specification as the computer's I/O port.

A full explanation of how to set up a COM port is given in the computer's own BASIC manual under the OPEN COM statement and in the appendix on communications. (Please note that the default parity setting given in the manual was found not to work at the time of writing. You need to specify the 'E'; eg COM1:600,E,7,1.). For a serial printer please also refer to the printer manual for setting up the speed etc to match that of the computer interface.

A speed of 600 bps is normally suitable for a printer. However, if your printer has a buffer memory, you can set the speed at 1200 bps. This will allow MARKETEEER to transfer a letter or report quickly into the printer's buffer and then be free to get on with something else while the printer carries on with the printing.

Please type-in the port specifications you need (if the one already shown is not suitable) according to the instructions given on the screen.

3. Printer Control Strings

Please scan to Option 3 using the appropriate arrow key and re-read the explanatory text. Then hit the carriage return key to select Option 3. MARKETEEER requires its printer to be able to print in 3 different type-sizes and 2 different print qualities.

While most modern printers cater for this, the codes which MARKETEEER must send to them to make them change the current type size varies with the make & model of printer. This Option allows you to set up the strings of characters which effect the necessary changes in type size.

The ones currently set up as shown on the screen may or may not suit your printer. Each control character within each control string is shown and entered as a group of 3 digits; eg the 'escape' character is entered as '027'. All you have to do is over-type what is already shown with the equivalent codes for your printer (assuming they are different).

If you are using a dual-quality printer, all the type-size codes must be preceded by the appropriate quality switching code. In fact, the first four type-size codes are always preceded by the code which sets the printer into draft mode, while the fifth one (which is always set to 10 chrs/inch) is always preceded by the code which sets the printer into letter quality mode.

4. Database Reconstruction

This option is not strictly part of the configuration options. It is provided in case MARKETEEER'S data becomes corrupted due to such things as electrical transients on the mains supply and equipment malfunction. It provides a means (which should work in most cases) of reconstructing corrupted data files from data in other files which escaped corruption.

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Chapter 5: Defining Your Market

INTRODUCTION

We have already seen the list of options offered by MARKETEEER, and through the menu HELP facility, learned something of what each provides. We shall now discuss in detail the full operation and use of each option.

The main menu options are listed in the order of frequency with which they are generally used. However, this order is not necessarily the best one in which to introduce them. In fact, we shall discuss them almost in reverse order, starting with the options used to set up the database to suit your particular operation, later progressing to the options which you will use to update and maintain it in the light of everyday events.

Setting up involves shaping the database to the particular geographic sales or marketing areas into which you wish to divide the United Kingdom, and defining the 'values' which you wish each of the selection keys to hold. This is done using Option 8. So please press the '8' key on the top row of the keyboard.

MARKET DEFINITION OPTIONS

A new menu - the Market Definition Menu - now appears on the screen. Please scan through this menu using the down-arrow key and read the half screen of text on the right which explains each option as it is highlighted.

KEY NAMES

Option 1 allows you to name each 'key' used to define your market. Please type-in the figure '1'. A list of key names now appears. These are the names we have given to the five major keys. You can change these names if you wish. For example, you may wish to use the term 'territory' instead of 'sales area'. In this case, you simply follow the instructions given on the screen to change the name 'sales area' to 'territory' or 'buying zones' or whatever you wish.

Likewise, you can re-name the other keys to suit your own preferences. However, before doing so, please read the rest of this chapter to see more clearly what each key is, what it does, and how it should be used. Now please press the 'Esc' key to return to the 'Market Definition' menu selection.

A FIRST LOOK AT SALES AREAS

Please select Option 7: 'Define SALES AREA'. You should now be looking at a two-column list of sales area names. These were set up prior to sale to serve as a working example. They are to give you an idea for setting up your own sales areas on MARKETEEER.

(Please ignore the name of the rep following each / for the moment.)

Apart from a couple of odd ones at the end, these sample sales areas are in fact modelled on the ITV transmission areas of the United Kingdom. They are a pretty good approximation and make ideal ready-made sales areas for companies who wish to base their areas on TV or local radio advertising coverage.

HOW IS A SALES AREA MADE UP?

However well known or applicable these sales area names may be, they are nevertheless just names! How can we now give them geographic reality within MARKETEEER'S database?

Let us see how a typical sales area is structured within MARKETEEER'S database. Please spread your Bartholomew's postcode key map of the United Kingdom on the table. Then select the 'ANGLIA' sales area by pressing the 'Ins' key then the 'F1' key. You will now see a list of two-letter postcodes on the screen said to represent the 'ANGLIA' sales area.

A postcode generally comprises two letters, a number, a space, a number and two more letters. This does vary however in certain instances such as city postcodes. Of these, the first two letters of the postcode represent the postcode area. There are 120 postcode areas covering the United Kingdom. A table listing all the two-letter codes and the names of the respective areas they represent is given on the map. The map itself is divided into these postcode areas. Their boundaries are marked in red. Within each area is shown the appropriate two-letter (or sometimes one-letter) postcode also in red.

From the screen you will see that we have set up the 'ANGLIA' sales area to comprise the post areas NR (Norwich), IP (Ipswich), CB (Cambridge), CO (Colchester), NN (Northampton), MK (Milton Keynes), LU (Luton), SG (Stevenage), CM (Chelmsford) and SS (Southend). Try to locate them on the map. They are all in and around East Anglia.

WHAT A SALES AREA LOOKS LIKE

But what does MARKETEEER make of this configuration of two-letter postcodes? How can they possibly bear any geographic significance within its database? Now press the 'Esc' key until you get back to the Market Definition menu and then select Option 8 - 'Display Sales Area Map'.

The list of sales areas which you saw previously appears on the screen. Please type in the letter 'A' to display the 'ANGLIA' sales area. MARKETEEER now compiles the geographic co-ordinates of this sales area from the co-ordinates of the component postcode areas it has been set up to comprise. Soon, an outline of the United Kingdom appears and the actual area covered by the selected sales area is shaded in.

The 'bar charts' on the left of the map show the percentage of the prospects currently on file, together with the percentage of the total UK population, who are located in the sales area shown. This will be described in more detail in the next chapter when we deal with 'Market Statistics'.

It is interesting to note just how close this shaded area relates to the 'East of England' transmission area covered (currently) by Anglia Television via the transmitters at Tacolneston, Sudbury and Sandy Heath. (Please contact the IBA for maps showing the geographic areas covered by the various ITV companies.)

This display is an extremely useful check to confirm that you have in fact set up your sales areas on MARKETEEER the way you thought you had. Should you have typed any wrong codes by mistake, or put the right codes in the wrong areas, they will probably reveal themselves as odd far-flung areas which are shaded in but shouldn't be.

Study this display, and when you have finished, type QUIT (or press the 'Esc' key) to return to the list of sales areas. When this list returns to the screen, try pressing the carriage return (or 'Enter') key. You will now get a display of all the sales areas currently set up within the database, each one in a different colour.

However, although this gives a very pretty integrated display of your sales areas, please beware! The computer cannot generate as many different colours as there are possible sales areas. We have seen to it that no two adjacent sales areas have been given the same colour in this particular sales area configuration! Notice that instead of the bar charts, the names of the sales areas and their respective colours are shown to the left of the map.

Look at the multi-coloured display of our sales areas, and then cast an eye over the map on the table. Each shaded area on the screen is a group or conglomeration of the postcode areas shown on the Bartholomew's map.

What you must now decide is how you want YOUR sales areas to look. Perhaps the 'TV' areas we have already set up will suit you: perhaps not.

Please type-in 'QUIT' or press the 'Esc' key. The list of sales areas reappears. Now press the # key. The same list now appears, but with the various names shown in different colours. The colour in which a name is shown is the colour in which that sales area is displayed on the map. When you set up your own configuration of sales areas, you may use this facility to change the colour in which some of your areas are shown in order to avoid adjacent areas being the same colour and therefore indistinguishable.

LOCALISED BUSINESSES

The sales area configuration you have just seen assumes that the business concerned covers the whole of the United Kingdom.

Perhaps your business does not cover the whole of the United Kingdom. You may hold a local territorial franchise or dealership for a large national supplier. If so, you will want to arrange your sales areas to cover only that part of the United Kingdom for which you are responsible. This is no problem. A sales area may comprise anything from a full 100 postcode areas down to as little as one single postcode area.

DECISION TIME!

It is now decision time! Will the sample sales areas suit you? Do you already have your own sales areas well defined?

Is it time for you to rationalise or re-think your sales areas? Do you need a localised version? Now is a very good time to get all this sorted out before you transfer your sales/marketing records onto MARKETEEER.

PLANNING YOUR OWN SALES AREAS

Please get all your maps and other documentation pertaining to your current sales areas. Call in everybody who is likely to be involved in a possible rationalization of your sales areas. Set out the maps showing your current sales areas alongside the Bartholomew's postcode key map of the United Kingdom.

There is a variety of systems on which companies have traditionally based their sales areas. Typical examples are: counties, telephone areas, purchasing areas, economic regions, the Ordnance Survey grid, concentric circles centred on offices or sales reps' homes, natural boundaries such as rivers and mountains, arbitrary lines drawn on a map.

None of these systems has been devised according to criteria relevant to sales and marketing. County boundaries, for example, were probably decided by ancient battle or feud rather than by relative road access between adjacent areas or population distribution.

Similarly, grid or circle based systems pay no heed to the positions of roads, natural boundaries or relative populations. All the other systems also have their drawbacks.

One problem common to them all is referencing. Usually, the reference number or code used with such a system is arbitrary and meaningless outside that system. References are thus difficult for customers to remember, and are extremely difficult to cross-relate with those used by other organisations such as mailing list brokers. And finally, if ever you need to change your boundaries, the task of re-referencing is formidable.

The postcode system is the only one which divides the country according to population density & distribution, and ease of access via the road network. It is universal and is stable in the long term. Your geographic referencing can therefore be understood easily by others, and vice versa. For a more detailed discussion on the advantages of the postcode system, please read the Post Office booklet 'Using Postcodes In Business Systems'.

Now please discuss your sales area organisation with your colleagues with reference to your maps and documents. Then, when you've decided exactly how you would like your sales areas to be arranged, draw them in on your Bartholomew's postcode key map (preferably using a yellow felt tipped pen).

When drawing in the boundaries, though, please make sure they run along the nearest postcode area boundaries (shown in red on the map). Doing this will prove no disadvantage at all. In fact it will make your sales areas easier to manage and involve your reps in less travel. This is because it avoids the severing of areas with mutually accessible populations, and ensures that populations are more evenly distributed among your reps.

The sample sales areas each occupy a contiguous tract of land. In other words, every postcode area within a particular sales area shares at least part of its boundary with at least one of its fellows. And this is the way sales areas are normally constructed. But there is no technical reason why a sales area cannot consist of scattered postcode areas where only some - or even none - actually touch each other.

Typical situations where fragmented sales areas are useful are: where the nature of your business demands different selling resources and techniques for metropolitan, urban and rural areas; and where for traditional or other reasons, a particular rep has to annex an odd pocket of territory into his main sales area.

SETTING UP YOUR SALES AREAS

Once you have settled upon the boundaries of your sales areas and drawn them in on the map, name each area with the name of your choice. Then write each name in its appropriate place on the map together with the name of the rep responsible for that area. (Please note: there's no technical reason for including the name of a rep if you don't want to.)

The name of the sales areas together with the names of their respective reps should be written in the form you saw them displayed on the screen earlier. That is, with the sales area name and the name of its rep separated by an oblique stroke, for example, 'ANGLIA/ROBERT'. The total number of characters used (including the '/') must not be more than 14.

Now, please select Option 2: 'SALES AREA Names'. The original set of sales area names and reps now appears on the screen.

NAMING YOUR SALES AREAS

The objective now is to replace these original sales area names with yours. But before doing so, please put your sales area names in order such that the one in which you are likely to be most active appears first, and work down to the one in which you are likely to be least active. Generally, this will mean starting with your 'home' territory and working outwards. It ensures that data in the most frequently accessed sales areas is found most quickly. Although we are in fact only talking about seconds, they are seconds saved. Now edit or over-type the existing sales area/rep names with your sales area/rep names according to the editing instructions shown on the screen.

If you have less than 18 sales areas, please delete completely any of our sales area names which remain. Afterwards, check that all have been typed in correctly. If you spot any errors, amend them in the same way using the left & right arrow keys to position the cursor over the errors before over-typing with the correct letters. Finally, press the 'F1' key to return to the Market Definition Menu.

DEFINING THEM GEOGRAPHICALLY

Now select Option 7: 'Define SALES AREA'. Your own sales area names appear again on the screen. Press the 'Ins' key and the 'F1' key to select your first sales area. A list of two-letter post area codes appears. They are the ones for our old 'ANGLIA' sales area. The cursor is flashing over the first letter of the first two-letter code.

Referring to your Bartholomew's postcode key map, type in the two-letter codes for all the postcode areas falling within your first sales area. If any of our old codes remain after you have finished, please delete them as instructed on the screen. When all the postcodes have been typed in correctly for this sales area, press the 'F1' key to return to the sales area names display.

Now scan down to the second sales area name and select that one by pressing the 'Ins' key. Then press the 'F1' key to get the post areas display for that sales area. Refer to the map again and type in the two-letter postcodes for this area also. Do the same for all your sales areas. Finally, having returned to the sales area names display from completing the last sales area's postcodes, press the 'Esc' key to return once again to the Market Definition Menu.

CHECKING YOUR SALES AREAS

Select Option 8: 'Display SALES AREA map', and wait for the list of sales areas to appear on the screen. Then type-in the letter 'A' to display the first one. After a delay in which its co-ordinates are compiled, your new first sales area appears as a shaded zone on the UK outline.

Check the shape and coverage of the shaded zone against your first sales area as marked out on the Bartholomew's postcode key map. They should agree. If they don't, you must go back to the postcodes display for that sales area and correct any of the two-letter codes that you have typed in wrongly. Go through the same exercise for checking the geographic shape and coverage of your other sales areas.

When you have checked out your last sales area in this way, please return to the list of sales areas from which you select the various map displays. Then, as a final gesture, press the carriage return (or 'Enter') key to obtain a composite display of all your sales areas together in their different

colours. Is this how you want the country to look in terms of your sales/marketing operation? If not, you will have to have a re-think and go through the preceding process again.

FUTURE RE-ORGANISATION

Suppose that after you have been using MARKETEEER for some time, and after you have placed lots of details of many customers and prospects on-file, you decide that the way you have organised your sales areas is no longer the best way. Perhaps your sales force has changed. Perhaps your market has expanded. Perhaps the geographic distribution of your prospects has changed.

In such an event, you may re-define your sales areas simply by repeating the exercise you have just gone through for setting them up in the first place.

You may do this without disturbing any of the data on individual prospects which you may have built up within MARKETEEER'S database in the meantime. This is because MARKETEEER automatically re-assigns each prospect to his appropriate new sales area solely by reference to his existing postcode. Your own sales areas are now installed within MARKETEEER'S database.

WHAT IS A KEY?

In the context of MARKETEEER, a 'key' is an item of information which defines one of the many attributes of a market. The main attributes recognised by MARKETEEER are 'relationship', 'status', 'type of event' and 'product/service'.

Since there are many different types of relationship, status, sales event and offered services defining your market, so each key must have a variety of 'values'. For example, the 'relation' key must have a different value for each of the many possible relationships your business may have with the various people, companies and organisations within your market.

Let us illustrate this with an analogy. You know that an amount of money called 'invoice total' can have different values according to which invoice you are talking about. For example, the total for one invoice may be £30.23 whereas the total for another invoice may be £5764.42! Although these amounts of money are vastly different, they are still values of the same thing, namely, 'invoice total'.

Similarly, the 'relation' key, although it is one key, may have many different values. A key's values, however, are not expressed in figures, but in words. For example, the kind of 'values' the 'relation' key could have are words like 'customer', 'agent', 'dealer', 'competitor'. They each describe one of the various relationships you may have with the people, companies and organisations within your market. This concept will become clearer once you see some real examples and start to use them within the context of your real sales and marketing operation.

Let us start by looking at the sample key values already set up on MARKETEEER prior to despatch to serve as guidelines. We shall now discuss options 3, 4, 5, and 6 of the Market Definition Menu. Please scan through these options using the down-arrow and up-arrow keys and re-read the explanatory text on the right of the screen for each option as it is highlighted.

THE 'RELATION' KEY

Please select Option 3 - 'RELATION Values'. A two-column list of words appears on the screen. These are the sample 'values' already set up for the Relation Key.

To show that MARKETEEER can be applied to the purchasing side of a business as well as to the selling side, the left-hand column contains 'values' associated with selling while the right-hand column contains 'values' more relevant to a buying operation. Please read through these now and ponder on them for a few minutes.

Of course, you are quite at liberty to apply MARKETEEER to selling only, purchasing only, or to both. This means that you may set up all 18 key values for selling, all 18 key values for purchasing, 9 for one and 9 for the other (as show here), or divide them between the two any way you wish!

Later, when you are using MARKETEEER, you will assign one particular value of the Relation Key to each person, company and organisation you put on-file. Thus, any given person, company or organisation will be classified as a 'customer', 'agent', 'dealer', 'competitor' and so on. What might not be so immediately obvious is that once this is done, you are able to classify or 'slice' MARKETEEER'S database into 'customers', 'agents', 'dealers', 'competitors' and so on and then set them up separately as consolidated targets for different sales or marketing exercises.

Now please press the 'Esc' key in order to return once again to the Market Definition Menu.

THE 'STATUS' KEY

Please select Option 4 - 'STATUS Values'. Now a different two-column list of words appears on the screen. Those in the left-hand column relate to the stages a 'sales prospect' may pass through on his way from being a completely 'cold' unknown to a regular 'cast iron' customer, while those on the right show the equivalent stages for a prospective supplier.

In this list, we have tried to cover all the phases a prospect or customer could pass through in the full course of a trading relationship. It starts where he is nothing more than an uncontacted name from a directory, passes through the various growth phases in the trading relationship with him until he is a regular customer, and finally cover the possible effect of taking him for granted to the unthinkable conclusion of losing him to the competition!

Again, as with the values assigned to the Relation Key, each person or company on file is given one of the prescribed values available for the Status Key - the one which specifies that particular person's or company's current 'status' as a prospect. This, in turn, means that you are able to classify or 'split' MARKETEEER'S database instantly into groups of prospects such that all the prospects in one group have the same current status. Thus you are able to target a particular mailshot or telephone campaign at, say, all your 'responding' prospects, or at all your 'regular' customers.

At this stage, you can see that we are able to target a particular sales or marketing exercise (a mailshot etc) at a group of prospects within MARKETEEER'S database which is restricted to both a value of the Relation Key (eg 'dealer') and a value of the Status Key (eg 'responding')! In other words, you are targeting a mailshot at those 'prospective dealers' who are currently at the stage of 'responding' to your advertising!

We are sure that by now you have begun to see MARKETEEER'S growing power of selection, and how this, in turn, will greatly increase the yield of your marketing efforts and materials through more accurate and effective targeting.

And so far, we have only used two of the keys!

Please study and ponder on these values of the Status Key for a few minutes and then press the 'Esc' key in order to return to the Market Definition Menu.

THE 'EVENT' KEY

Now please select Option 5 - 'EVENT Values'. The two-column list of words which now appears reflects the possible types of sales event through which we may communicate with our prospects. Perhaps the ones you use are different. Again, the list is split between the sales side and the supply side.

The function of the 'event' key is to record the means whereby, or the situation wherein, you were last in touch with each prospect. In other words it records the TYPE of event and the DATE on which it occurred. Thus, when reviewing a prospect later for a telephone follow-up for instance, you will be reminded when and where you were last in touch - at a seminar you gave last month, at your exhibition stand, by cold mailshot and so on. As well as the 'last' event, you can also record the 'next' (proposed) event for each prospect and the date on which you have scheduled that event to occur.

Again, this key can also be used for selection. For example, it can be used to restrict a follow-up telephone campaign to just those prospects who attended a certain seminar, or returned reply-paid cards from a particular mailshot.

And indeed, such target groups can be further restricted to specific values of the Relation and Status keys as described earlier.

As with the values of the other keys, you are free to alter all the values of the EVENT Key to whatever you like to call them. However, there is something special about the first 6 values of the EVENT Key. As you can see, they relate to mail, phone and telex (or electronic mail). Although you may re-word what you actually call these first 6 values, they must nevertheless keep these same meanings. This is because MARKETEEER'S mail, telephone and telex sub-systems update the appropriate one of these six values automatically for each prospect concerned as follows:

If you send him a one-off letter, his Event Key is set automatically to the first value. If you make a one-off telephone call to him, then his Event Key is set automatically to the second value. If you send him a one-off telex, then his Event Key is set automatically to the third value. If he is sent a letter as part of a mailshot, then his Event Key is set automatically to the fourth value. If a phone call is made to him as part of a telesales session, then his Event Key is set automatically to the fifth value. If a telex or electronic mail message is sent to him as part of a telex shot, then his Event Key is set automatically to the sixth value.

Please study and ponder on the sample values shown for the Event key for a few minutes and then press the 'Esc' key to return to the Market Definition Menu.

THE 'PRODUCT/SERVICE' KEY

The function of this key is to indicate a prospect's relevance to your business in terms of the products or services offered by your company which he is currently 'in the market for'. Conversely, in the purchasing context, it indicates which of your needs he is offering or likely to be able to provide.

So now please select Option 6 - 'Product/Service Values'. In the two-column list of words which now appears is, on the left, a list of the various products and services EBS offers, while on the right is a general list of the product and service classes that EBS requires in the running of its business. Naturally, when you come to set up your own values for the Product/Service Key, they will be the names of YOUR products and services.

Please note that only 9 product/service categories, and 9 'needs' categories have been allowed for. At first sight, this number may seem inadequate. But this is not true. Although the number and diversity of actual products and services can be far greater in terms of what they are and what they do, these are not the best criteria on which to base their selling or marketing.

We must think of our products and services in terms of their potential sales sources which exist within our market. Each customer-type is thereby regarded as a potential sub-market for more than one product. For example, if you sell typewriters, paper and correction fluid, although the three products are very different in what they cost, what they look like and what they do, they are potentially saleable to the same category of people.

Typewriters, paper and correction fluid should therefore be treated as a single product or service category. It will take much thought and skill to classify your products and services into a sufficiently small number of categories, but the dividends will pay off in terms of the increased manageability of your market database when it comes to specifying the exact profile of a particular target sector within your market.

Please study these values for the Product/Service Key for a few minutes and then press the 'Esc' key to return to the Market Definition Menu.

THE KEYS IN RELATION TO A PROSPECT

The Relation, Status and Event keys may each have only one of their values applied to any given prospect at any given time. For example, one of your prospects may be an 'agent' who gives you 'on-going' trade, and with whom you were last in touch at an 'exhibition' on such and such a date. He is thus allowed only one out of the up to 18 possible values for each key.

However, since it is likely that any one prospect may be in the market for products or services in more than one of your up to 18 product/service categories, each of your prospects may hold up to 15 out of the up to 18 possible values of the Product/Service Key. Thus, for example, I could rate a particular customer of mine as being in the market for 'software packages' AND 'consultancy' AND 'computer systems' AND 'field service'.

KEYS IN RELATION TO THE MARKET

On the other hand, when specifying the profile of a particular target group of prospects within your overall market, the said group may be made to INCLUDE prospects bearing any number of the up to 18 possible values of each key.

For instance, a particular target group could be set up to include prospects with any of 7 values of the Relation Key, 4 values of the Status Key, 2 values of the Event Key and 12 values of the Product Key.

The whole procedure for setting up such a profile is discussed in complete detail in the chapter on defining targets.

PLANNING YOUR OWN KEY NAMES & VALUES

Having seen our sample key names and key values, and knowing the way you have already of classifying and categorizing your prospects, you must now decide what you wish to call each key and the values you want it to have to suit your business. This may take a considerable effort and involve many different people within your company.

Perhaps it is time to rationalise and reconsider totally the way you classify your prospects. Perhaps you have it all worked out already. Whatever the case, please break off from your introduction to MARKETEEER for the time being until you know exactly what values you want to assign to each of the keys and have put them down on paper as a set of formal lists.

ENTERING YOUR OWN KEY VALUES

Now select Option 1 of the Market Definition Menu to display the key names and amend the names as required. Then in the same way, select Options 3 to 6 in turn and amend each key's set of values as necessary.

When you have finished you will have set up MARKETEEER'S database to reflect precisely the 'shape' and character of your own market. Prior to despatch, some sample prospects were set up within MARKETEEER'S database to serve as initial examples. In the next chapter, we shall see how these sample prospects appear within the new framework you have just set up.

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Chapter 6: Statistics

INTRODUCTION

It may seem premature to discuss market statistics at this stage. After all, you have not yet put any of your individual prospect details onto MARKETEEER'S database. On the other hand, having now set up your own sales areas and key values, you are probably anxious to see just how a typical set of prospects fits into the market framework you have just created.

In view of this, we have set up within MARKETEEER'S database details of a statistically significant number of sample prospects. We have placed them in what we think is a typical geographic distribution for a 'nationwide' prospect base.

Although your own business may be biased towards a specific part of the country, this sample base of prospect details should provide a clear means of viewing your own market framework which you set up in the previous chapter. When later you embark on the once-only task of building up the database from scratch with the details of your own existing prospects, this sample data will be seen to have served its purpose.

THE STATISTICS OPTIONS

The first option on the Statistics Menu is for compiling statistics. The second option enables you to print out a report showing the statistics for all the keys together. The next five 'double' options display statistics tables and bar charts for each of the five main keys. The last double option provides the same details for the UK population statistics.

Now please select Option C - SALES AREA TABLE. The two-column tabular display shows the now familiar names of your sales areas. However, the figures shown in the adjacent REFS and %% columns relate to the sales areas we set up originally as examples. If during your study of Chapter 5 you altered the configuration of the sales areas to suit your own business, these figures are no longer meaningful.

COMPILING THE STATISTICS

Before you can print or display any meaningful statistics, you must first re-compile them for your own system of sales areas and key values. MARKETEEER compiles its statistics by looking at the value of each key for each prospect currently on file, and counting up how many of these prospects hold each possible value of each key.

Statistics are compiled and presented specifically within a particular market framework of sales areas and key values. We do not know the details of the market framework which you yourself set up during your study of the last chapter.

You must therefore compile your own statistics: we could not compile any sample ones for you. So now please select Option A - 'COMPILE STATISTICS'.

MARKETEEER now proceeds to compile the market statistics, as confirmed by the message which appears on the screen. This can be a quick process or a fairly long one, according to how many prospects are currently on file.

MARKETEER compiles 5 different sets of market statistics - geographic, relation, status, event and product. For technical reasons, it does this in 3 separate phases. In Phase 1 it does the Sales Area statistics. In Phase 2 it does the Relation, Status and Event Statistics. In Phase 3 it does the Product Statistics. The phase currently being dealt with is shown on the screen.

For each phase, MARKETEER combs through the database examining each record in turn. The number of the record currently being examined is also shown on the screen, together with the total number of records currently on file. This information is called 'confidence' information. It is there primarily to show you that MARKETEER is getting on with its job during the delay, and that everything is working properly.

You can tell how far MARKETEER is through its current phase by comparing the current 'record number' with the 'total' number of records as shown on the screen. Once all three phases of the compilation are complete, the 'STATISTICS OPTIONS' re-appear. The current market statistics for OUR sample prospects expressed within YOUR market framework are now on file.

WHEN TO RE-COMPILE

Strictly speaking, the statistical picture of MARKETEER'S database changes whenever a new prospect is added, an old prospect is deleted, or the details (key values or dates) of a prospect are altered (updated). The significance of the change depends on the number of prospect records involved since the last compilation.

In order to get the true up-to-date statistical picture of your market, therefore, you should re-compile the statistics whenever you wish to look at them for the first time after the database has been significantly updated. If you merely wish to display them again simply to remind yourself of the figures or show them to a colleague, there is no need to re-compile them prior to displaying or printing them.

SALES AREA POPULATIONS

Please select Option I. You now see a table listing the names of the sales areas which you set up in the last chapter. Against each sales area name are two numbers. The first number (in the column headed 'REFS') when multiplied by 1000 gives the approximate number of Postal Delivery Points (ie postal addresses) in that sales area. The second number (in the column headed '%%') is the number of Postal Delivery Points in the sales area concerned expressed as a percentage of the total number of Postal Delivery Points in the United Kingdom.

Now please press the 'Esc' key and when the Statistics Options return to the screen, select Option P. The bar chart equivalent of this table now appears. The heights of the bars show the percentage of the total United Kingdom postal delivery points in each of your sales areas.

The market potential of a given sales area is related to the number of potential purchasers in that sales area. Generally, these purchasers are not individuals in the sense of every man, woman and child in the population, but rather they are the households and businesses - the domestic and commercial budget centres!

However, there is a vast difference in the purchasing power between a household and a large company, so does this mean that we also need to know the number of employees in each company in order to measure its purchasing power accurately? If we wish to measure the purchasing power (or potential market) of the company itself, the answer is 'yes'. But here we are not so much interested in the company itself as a potential market, but in the general market potential of the sales area within which it is situated.

Suppose a sales area is populated exclusively by one-man businesses. You can easily see that both the domestic and the commercial market within that area is simply proportional to the number of postal addresses in that area. This is true anyway of the domestic market.

But what of the commercial market in an area where the majority of people work for large companies? The answer is that it is much the same as if they were all self-employed.

This is because the total number of addresses reflects the amount of industrial & commercial activity (and therefore purchasing power) in an area whether the people there 'market' their labour individually as self-employed, or collectively as employees of large companies.

Thus, the percentage of postal delivery points in a given sales area is a direct measure of the percentage of your potential market it contains. This bar chart thus shows the percentage of your overall potential market contained in each sales area. If it shows that your sales areas are badly out of balance, you can go back to the Market Definition Options and re-distribute the post areas between your sales areas so that you get a more equal 'population' in each area.

SALES AREA STATISTICS

Let's now take a look at the statistics you have just compiled. Please select Option C - 'SALES AREA TABLE'. A tabular display appears on the screen. Study this display carefully and see exactly what it tells you about YOUR sales areas.

Under the heading of 'KEY VALUES' you see your now familiar list of sales area names. To the left of each name are two figures. The first figure is under a heading called 'REFS' and the second is under a heading called '%%'. For each sales area, the 'REFS' figure is the number of prospects currently on file whose addresses fall within that sales area. The '%%' figure is this number expressed as a percentage of all the prospects currently on file.

This display therefore gives you a picture of the relative distribution of your current prospects among your various sales areas. It is useful for identifying hitherto unexploited areas and for helping you decide where you may best deploy more sales effort to generate more business. Perhaps you should move your sales force around to put the stronger or more experienced people into the areas where business could be improved.

Notice the prominent message on the screen saying that so many 'REFS' are not postcoded. This is telling you that out of all the prospects currently on file, the stated number have no postcodes entered for their addresses! Thus MARKETEER does not know in which sales area they belong. We have done this on purpose to illustrate the point. So please put postcodes in for all prospect addresses.

Now press the 'Esc' key to return to the Statistics Options and then select Option I. The same information is now displayed as a bar chart. The height of each GREEN bar shows the percentage of your prospects who are located in each respective sales area. The bars are labelled A through to R corresponding to the names of the sales areas shown at the side of the bar chart. The RED bars appearing 'behind' the green ones show the percentage of the UK population located in each respective sales area.

MAP DISPLAY

Having seen this 'population distribution' of prospects in tabular and bar chart form, let us now take a more detailed look at it. To do this, we need to go back to the Map Displays. Please press the 'Esc' key to return to the Statistics Menu, then press it again to return to MARKETEEER'S Main Menu.

When the Main Menu re-appears, please select Option 8 to get to the Market Definition Menu and then 8 again to get to the Sales Area Maps display menu. Then, when the list of sales areas appears, please select your first sales area - Sales Area 'A' for display. Now wait until the map appears and the sales area and bar charts have been shaded in. We shall now focus our attention on the bar charts at the left of the display.

Imagine the rectangle as an empty glass cylinder which can be filled with water. The shaded area - which appears towards the end of the display process - is water which is poured into the cylinder. The scale down the left-hand side is in 'percent' ranging from 0% when the cylinder is empty to 100% when it is full.

The total volume of the left cylinder represents the total number (100%) of the prospects currently on file. The volume of the water (shaded part of the cylinder) represents the percentage of those prospects who actually reside within the sales area currently shaded in on the map.

The total volume of the right cylinder represents the total (100% of) the United Kingdom population. In fact, the national population is represented by the total number of postal delivery addresses in the country (approximately 22 million). This is more significant for sales & marketing purposes than the actual population. The shaded portion of the right cylinder gives the percentage of postal addresses (population) in the displayed sales area.

These bar charts enable you to compare the percentage of your prospects located in the sales area shown against the percentage of the national population it contains. If the prospect percentage is less than the national percentage it means that you are under-exploiting that area compared with your other areas. If the reverse is true, then you have either saturated that area or are under-exploiting your others.

It also enables you to compare pictorially the proportion of the country covered by a given sales area against the proportion of your prospects (and the proportion of the national population) who reside in that sales area. When you have studied this display, please type QUIT (or press the 'Esc' key) to take you back to the sales area display options. Repeat the exercise for each sales area, comparing its area against its percentage populations.

The single sales area displays give an accurate picture of the geographic coverage and percentage populations of one sales area at a time. If you want a general overview of the proportional populations of all your sales areas together, please refer to Option I of the statistics described earlier.

Where finances permit, the displays can be shown live at sales meetings and presentations using a projection monitor and a large screen. Also, VDU cameras are available which can produce a 35mm slide of the screen image directly from the computer's video output.

Now, please select Option 7 as before to get the Statistics Menu again. Since you have not updated the database since you last compiled the statistics, there is no need to compile them again now. So please go right ahead and select Option D - 'RELATION TABLE'.

RELATION STATISTICS

Almost immediately, a display appears on the screen which is of the same general layout as the one for sales area statistics, except that this time, instead of the names of your sales areas, you see the 'values' that you set up for the Relation Key during your reading of Chapter 5.

The 'REFS' column gives the total number of prospects currently on file who hold each respective value of the Relation Key. The '%%' column expresses this number as a percentage of the total number of prospects currently on file. In theory, these percentages add up to 100. Sometimes, however, they may not appear to do so due to the chopping of a possible odd fraction of a percent from each displayed figure, which nevertheless contributes to the total.

Of course, the sum of the individual figures in the 'REFS' column should add up to the total number of prospects currently on file. The purpose of this display is to give you an idea of the ratios between prospects of different types.

Now please press the 'Esc' key to return to the Statistics Menu, then select Option K - 'RELATION GRAPH'. This same information is now presented as a bar chart with the same format as that of the sales area bar chart. After you have studied this, please press the 'Esc' key to return to the Statistics Options.

STATUS OR PROGRESS STATISTICS

Please select Option E - 'STATUS TABLE'. A similar tabular display now appears showing the various values which you set up for the Status Key. The 'REFS' and '%%' figures have the same significance as before.

This display gives you a statistical picture of what we call the 'temperature distribution' or 'heat map' of your current prospect base. In other words, it tells you what proportion of your prospects are 'hot', what proportion are 'cold', and what proportions are at the various stages in between. It is intended to help you plan where and how much you should next apply the 'heat'!

After mulling over these figures, please press the 'Esc' key to return to the Statistics Menu. Then select Option K - 'STATUS GRAPH'. The bar chart version of the Status Statistics is now displayed. Please study this and then press the 'Esc' key to return to the Statistics Menu.

EVENT STATISTICS

Please select Option F - 'EVENT TABLE'. The display which now appears follows the same layout as the others, but shows the values of the Event Key and the numbers and percentages of prospects last contacted by each means. This display is intended to give you a feel for your current preferences in 'means of contact' usage and their relative effectiveness.

When you have pondered sufficiently on this display, please press the 'Esc' key to return to the Statistics Menu. Then select Option L to display the Event Graph. Please study this and then press the 'Esc' key again to return to the Statistics Menu.

PRODUCT STATISTICS

Please select Option H - 'PRODUCT TABLE'. A display of the same familiar format now appears. However, there is something significantly different about this one!

The difference is in the figures. The numbers of references are significantly larger, and they add up to much more than the total number of prospects currently on file. What is more, the percentages add up to more than 100! This is because, unlike the other keys, the Product Key may have more than one (up to 15 in fact) of its values assigned to each prospect.

Each prospect can therefore contribute to the total number of references to more than one value of the Product Key. This all comes about because the Product Key refers not simply to 'prospects' like the other keys, but to 'product/service sales sources'. And each prospect has the potential of being a multiple 'product/service sales source'.

So what do these figures for the Product Key tell you? They tell you what proportion of the prospects you currently have on file are 'in the market for' each of your products or services. They are treating your total database as a separate market for each product and evaluating that market in its own right. This display is therefore an aid to adjusting your product mix in the light of sales/marketing feed-back.

After you have finished pondering on this display, please press the 'Esc' key to return to the Statistics Menu. Then select Option M to have a look at the information in bar chart form. The fact that the percentages can add up to much more than 100 is evident from the greater average height of the bars.

THE PRINTED REPORT

In many cases, a quick look at a screen display of the statistics figures for a particular key will suffice. However should you need to browse over these figures or make comparisons between the figures given for different keys, then a printed report is necessary.

So let us now produce a printed report for the key statistics. Please select Option B - 'PRINT STATISTICS'. Now the display changes and you are asked to switch on the printer. So switch on the matrix printer. Then follow the instructions given on the screen for printing out the report. The Statistics Report is then printed, after which you are returned to the original Statistics Menu.

This report is a side-by-side presentation of the displayed reports you have seen already. Please press the 'FORM ADV' or 'FORM FEED' (FF) button on the printer and then carefully tear off the report.

Thus ends your first trip through MARKETEEER'S statistics facilities. So now please press the 'Esc' key to return to the Main Menu and switch off your printer.

TIME FOR A CHANGE!

Let's put off for a little longer that inevitable donkey work of typing in all the names, addresses and other details for your current prospects. Instead, in the next chapter, we shall have a complete

change of subject by examining MARKETEEER'S excellent facilities for writing a good sales letter for your direct mail exercises.

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Chapter 7: Writing Letters**INTRODUCTION**

It is not easy to write a good sales letter! Yet a good sales letter is probably the most vital component of any targeted mailshot. It can make or break that tenuous first connection between you and your prospect. If it is too long, he won't read it. If it does not convey enough about you and what you are offering, his road to commitment won't become established.

The goal in writing a good sales letter is ONE page! The prospect must see his name and address at the top and your signature at the bottom. Compacting a complete smooth-reading sales message in the space between is the whole underrated skill of the sales letter writer.

MARKETEER cannot compose the text of your sales letters for you. But it does provide every 'mechanical' assistance to make your job of outlining, building, drafting, reviewing, editing, tuning and honing your sales letters as easy as at all possible.

The Letter Writer program deals only with the actual content or text of your sales letter. It does not put in the names and addresses of the prospects to whom you are sending it. Neither does it put in the date, reference number or the name & title of the letter's author or signatory. All these are handled by other programs within the MARKETEER package which are described in other chapters.

OVERVIEW

MARKETEER's letter creation section contains two libraries: a Sales Letter Library (which holds up to 40 letters) and a Standard Paragraph Library (which holds up to 40 paragraphs). You may create, amend or delete any letter in the Letter Library or any paragraph in the Standard Paragraph Library.

You may write a standard paragraph for sales letters and place it in the Standard Paragraphs Library under a title of your choosing. You may write a complete sales letter and place it in the Sales Letter Library under a title of your choosing. You may import text from a word processor text file into the Letter or Paragraph Libraries under a title of your choosing.

You may build a draft sales letter from one or more standard paragraphs selected to appear in whichever order you choose. The selected paragraphs will then appear in a new letter in the Letter Library under the title NEW LETTER. You may then edit and add to this NEW LETTER to form a polished sales letter. You may then change its title to one of your choosing.

You may select, and place in the MAIL FILE, any ONE of these up to 40 letters (or paragraphs) at any one time. MARKETEER's Mail, Telex, FAX and Electronic Mail subsystems assume that the text of the letter or message they are supposed to print or transmit is that currently to be found in the MAIL FILE.

From MARKETEER's Main Menu, select Item 3 Letter Creation. You should now see the Letter Creation Menu. Use the vertical cursor control keys (up-arrow and down-arrow) to scan up and down this menu and read the help text on the right of the screen which describes each item.

THE LETTER LIBRARY

As a practical introduction to MARKETEEER's letter creation section, let us now go through the exercise of 'test printing' the sample sales letter which we have placed on file for you prior to despatch. So now, please select Item 1 Sales Letter Library.

A list for up to 40 letter titles now appears. Only the first position has a letter title inside it, namely SAMPLE LETTER. We have written just one letter to serve as an example. To select a letter from this list, move the cursor opposite the title of the letter you require and press the Ins key to mark it and then the function key F2 to select it.

The text of the sample letter is now displayed on the screen and the function key options are shown at the bottom of the screen. Press the F1 function key to display the help screen and read what each function key command does.

PRINTING THE LETTER

[NOTE: You should have already set up the appropriate margin setting control codes in the printer control codes box in the Configuration Menu. The coding must be set to the left print margin to between 6 and 10 spaces in to suite your notepaper.]

Now switch on your printer, make sure there is A4 plain paper in the in-tray, then press the function key F8-PRNT (print). If you press F8 before switching on the printer, a red message 'device fault' is displayed above the text window. If you now switch on your printer, this message should disappear and printing will take place. If it does not, check the cable and power supply to the printer and see that the paper is properly placed in the printer's in-tray. A green message 'PRINTED' will appear as soon as all the text has been passed to the printer.

[NOTE: if your printer has a buffer memory, the green 'PRINTED' message will appear almost immediately while actual printing has barely begun. This is because the printer's memory has taken in all the text and the printer is printing from its own internal memory.]

When it has finished, take the paper from the printer. Please read the letter you have just printed out. Press the Esc key twice to take you back to the Letter Creation Menu.

THE LIBRARY OF STANDARD PARAGRAPHS

Please select Item 2 of the Letter Creation Menu. A list of paragraph (or text frame) titles appears. This looks similar to the way the letter titles are listed in Item 1. Only 4 text frame titles are shown. This is because only 4 of the 40 possible paragraphs exist as yet.

Text Frames are generally synonymous with 'paragraphs'. Each text frame is originated, edited or deleted individually. Each frame can be given a title so that you can identify it at a glance in the Standard Paragraph Library list later on. Up to 40 different text frames can be held in the Standard Paragraph Library at any one time. Any sales letter may be made to comprise any number of these up to 40 possible text frames, and the frames can appear in the letter in any order.

Each frame can theoretically contain up to 200 words. However the limiting factor is the space within the actual text window on the screen which is 14 lines, with each line containing up to 70 characters (letters, numbers, punctuation marks etc.). This generally works out as 10 or 12 lines of text maximum per paragraph in a printed sales letter with a print width of 65 characters.

While the term 'text frame' refers specifically to a physical unit of text which can be independently identified, composed, edited or deleted, the term 'paragraph' refers to the corresponding 'logical' or 'semantic' unit of text which expresses a single integrated thought or idea. Generally, one paragraph is accommodated within one text frame, however, where appropriate, a text frame may hold two or three small paragraphs or an itemised list.

This limitation on the size of a text frame (and hence that of a paragraph) imposes the kind of discipline needed to make sure each point in your sales letter is put over concisely. It probably means that you cannot fit in what you want to say first time. It forces you to work at it. The result can only be a punchier, smoother flowing, more informative - and hence more effective - paragraph.

EDITING A TEXT FRAME

Within the confines of a text frame, MARKETEEER provides editing facilities to enable you to write and play around with your text until you get it exactly right. But it does this without burdening you with the maze of control key functions associated with most word processors. In fact, all you need to know is shown on the screen.

So now let us have a look at one of the text frames which make up the letter you have just printed. With the cursor at the title of the first text frame entitled INTRODUCTION, please press the Ins key to mark it, then press the function key F2 to select it.

[NOTE: the title of a paragraph given in this list does not itself appear as part of the text of that paragraph. It is there simply as a memory trigger for you when you come to select the paragraphs you need for a particular sales letter.]

The text of this text frame now appears on the screen. You will recognise this text as the first part of the printed letter. Above the text window you are told which paragraph this is. Below the window are the currently effective function key commands. Please press the function key F6-EDIT. The cursor now appears at the top left of the text window and you may now edit the paragraph within this text frame.

CURSOR CONTROL

Just to recap, the cursor is the flashing line which is always on the screen when the computer is waiting for you to do something. It also indicates the position at which whatever you type-in will appear or where the next 'action' will take place.

So before you can edit any part of the text, you must position the flashing cursor to the place within the text where you want to make the alteration. The cursor is positioned by advancing it along the text using the right pointing arrow key, or returning it back again using the left pointing arrow key. If you have a long way to go in either direction, keep the appropriate key held down. The cursor will then travel along the text continuously in the appropriate direction.

Try it. Press and hold down the right pointing arrow key. The cursor skims along the text line by line. If the last word in a line is a long way short of the right hand edge of the screen, the cursor does not venture into the 'dead space' between the end of the word and the edge of the screen.

This is because that 'dead space' is not part of the actual text stream. Therefore you should never be able to get into a position to type in anything there. Should you wish to insert anything there, this is dealt with in another way which is discussed later. Notice that when the cursor reaches the very end of the existing text, it goes no further.

Now press and hold the left pointing arrow key. The cursor now skims back along its path until it reaches the beginning of the line. When it gets there, it refuses to go further. This is how you position the cursor so that it 'hovers' over the precise character at which you wish your editing actions to take effect.

The End key takes the cursor to the end of the text on the current line and the Home key takes the cursor to the start of the current line.

Now move the cursor to the middle of the first line using the right-pointing arrow key. Then press the down-arrow key. Each time you press this key, the cursor moves down to the line below. Keep pressing this down-arrow key until it reaches the bottom line. Now press the up-arrow key. This takes the cursor up to the line above. Keep doing this until the cursor reaches the top line again.

You will no doubt have noticed that when a line of text was shorter than the original position of the cursor, the cursor moved leftwards to the end of the short line. However, when you moved it further down to a long line, the cursor resumed its original position along the line. This is because the cursor is never allowed outside the text stream where you cannot legitimately type.

INSERTING TEXT

Let us now insert a couple of words into this text. Position the cursor to the letter 'f' of the word 'for' on the first line. Now press the 'Ins' key. You will see the word 'INSERT' at the top of the screen.

Now type-in the words 'very much '. Don't forget the space after the word 'much'! Instead of starting off 'Thank you for your enquiry' the letter now starts off 'Thank you very much for your enquiry'. You have inserted the words 'very much ' almost at the beginning of the letter without having to re-type the whole lot.

Notice that as you typed in each new character, all the words in the rest of the paragraph instantly moved up and re-arranged themselves as necessary. You can insert single characters, words, phrases, sentences, lists or even paragraphs anywhere within a text frame by this means. You cancel the INSERT mode either by moving the cursor or by pressing the 'Ins' key again.

SAVING AMENDED TEXT

If you wish this amended version of your text to be preserved in place of the original for possible future inclusion within a sales letter, press the function key F2. If you wish not to preserve the changes you have just made, but leave the original in place, then press F3 instead. Do not do either for the moment.

DELETING TEXT

We shall now delete the words we previously inserted. Now move the cursor to the letter 'v' of 'very' which you inserted. Now press the 'Del' key. The letter 'v' disappears. You are left with the word 'ery'. Keep pressing this key until the words 'very much ' have disappeared. Don't forget the space at the end of the word 'much '. You are now back to the original text.

You can use this key to delete any character or group of characters within the text. If you have a lot to delete in one run, hold down the 'Del' key firmly. Try it now! Never mind if it makes a mess of the text on the screen. Notice how the text beyond the cursor appears to be sucked continuously into an insatiable 'black hole'.

Notice also that it all stops when you let go of the key. To re-set the paragraph, excluding the deleted text, press the function key F7. The remaining text is re-set correctly within the text frame. We don't want to store this mess, so let's just leave the original text in place so you or one of your colleagues can go through this exercise again at some other time. Now press the F3 key to escape from the editing function without storing the changed text. The original text now reappears in the text window.

It is useful to remember what you have just done. Sometimes, when you have recalled an old text frame and started to edit it, you find that you have ended up with a total mess. Rather than try and make something out of what is now on the screen, you would rather abort the whole thing and start again from the original.

RECALLING THE OTHER TEXT FRAMES

There are two ways of accessing the other text frames in the Standard Paragraph Library. You can scan through the text frames in turn by pressing the function key F3-NEXT (or F4-PREV to scan in the reverse direction). Alternatively you can press the Esc key to get back to the Standard Paragraph Library list and select another text frame by title.

Use F3 to scan through and read the existing paragraphs. You will see that these paragraphs are all parts of the sales letter which you have just printed. Notice that the order in which the frames appear in the letter is slightly different from the order in which they are listed here. This is simply to illustrate that when forming a sales letter, you are not tied to the order in which you originated the paragraphs. Now please press the Esc key to get back to the list of Standard Paragraph Titles.

WRITING A NEW TEXT FRAME

Move the cursor down to a position where no title exists and press the function key F2. The beep indicates that you cannot select at this position. Now press the function key F4 to enter a new paragraph title. As a test piece, let's call our new text frame 'BAA BAA BLACK SHEEP'!

Please press the F4-EDIT function key. This places the cursor in the title field ready for you to enter the paragraph title. The editing functions available to you while typing in a new title or amending an existing one are the same as those for editing the text of a paragraph described earlier. So type in 'BAA BAA BLACK SHEEP' and press the carriage return (or Enter) key. The title is then stored. Now mark this title by pressing the Ins key and then select it by pressing the function key F2. The text window then appears.

Normally this would be blank. However, if you once had a previous paragraph text in this title position within the Standard Paragraph Library list, then that old text will reappear. This is because a paragraph (or letter) is deleted by deleting its title. The text remains but is rendered inaccessible. It becomes accessible again when a new title is entered in its original title position. This is a safeguard so that a paragraph deleted inadvertently can be 'undeleted' by re-entering its title (or any other title for that matter) in the position originally held by its title.

Please press the function key F6-EDIT and type-in the nursery rhyme. We have not reproduced it here since most people can remember it. But if you really can't remember it, please try another nursery rhyme instead! We suggest you type it out as straight prose rather than as lines of poetry. As confirmed by the instructions shown at the bottom of the screen, all the functions which were available to you while editing are available to you now for originating a new piece of text. When you have finished typing in your nursery rhyme, press the F2-SAVE function key to store the text. Then press the Esc key twice to get back to the Letter Creation Menu.

FIXED FRAME v SCROLLING

Unlike most word processing systems (and indeed MARKETEEER's own letter editor, MARKETEEER's text frame editor operates on a 'fixed frame' basis. When you have filled the text frame, you cannot enter any more text into the frame (unless of course you delete some first). The text does not scroll upwards out of view to make room for more text at the bottom. This is intentional.

The prime market for word processors is general office work. In that environment, the content or wording of what is to be typed into the word processor is normally decided and finalised in advance before it is entered. The purpose of the word processor is merely to store, recall, organise and sometimes edit pieces of prescribed text. The operator is usually a typist who deals only with syntax rather than with the semantics of what is being entered.

The user of MARKETEEER on the other hand is a writer of sales letters who is definitely interested in what is being said and how it can be improved. The function of MARKETEEER'S Letter Writer is to help the user DEVELOP the wording and content of a letter - paragraph by paragraph. The concern is primarily with the semantics of (the meaning carried by) the words being written.

When actually composing and developing text, you need to keep constantly in view the text, the whole text, and nothing but the text pertaining to the one set of closely related points about which you are currently concerned. In other words you need to be able to extend or edit the paragraph while being able to glance back over any of the foregoing words relating to your current train of thought. And for this, the 'fixed frame' system used in MARKETEEER is the obvious choice.

PLANNING YOUR OWN SALES LETTER

It is now time to think about your first real sales letter for MARKETEEER. What is going to be the theme of your next mailshot? Are you going to enclose a catalogue or product brochure with your letter? What points must you get over in the letter?

Naturally, you know the questions which you ask yourself when setting out to prepare a new sales letter. But however you prefer to go about it, you should end up with a list of distinct points which you feel you ought to get over in the letter. Then you will probably arrange these points into groups such that each group can be dealt with in a single paragraph. Perhaps in some paragraphs you will put over only one vital point.

The important thing is to finish up knowing exactly what you want to say in each paragraph, bearing in mind that you will have only four or five paragraphs worth of space available in the entire letter.

Now, in order to prepare for composing the actual wording of each paragraph on MARKETEEER, please write down the points pertaining to each planned paragraph on a separate sheet of paper. Then think hard about the points you have made on each sheet and mull them over with your

colleagues until you are all satisfied that they are correct and exactly the way you want them. Finally, number each sheet, and write a 'paragraph title' which expresses the collective essence of all the points made thereon.

COMPOSING YOUR SALES LETTER

From the Letter Creation menu, select the Standard Paragraph Library (Item 2). Move the cursor to a spare title slot on the Letter Library title list and press F4. Enter the 'paragraph title' from your first sheet of paper, then press the 'Enter' key to store the new title. Now press the Ins key to mark the new title then press F2 to select it.

The empty text frame appears. Now for the skilful part! From the points you have written down on your first piece of paper, compose the text for the first paragraph of your sales letter.

It will probably take you some time to acquire a skill in using MARKETEEER'S text entry, insertion and deletion facilities to maximum advantage. But it will come - probably quicker than you think. With them, for instance, a sudden flash of inspiration after the event can be slotted in back 'up stream' almost instantly, whereas if you were writing, typing or dictating instead, you might well be tempted just to let it go.

DEVELOPING YOUR TEXT

Once you have covered all the points planned for this paragraph, read it over on the screen and try to improve it. Mould and tune the wording to give the right amount of punch, persuasiveness and smoothness of flow. Try to cut out verbosity, but without sacrificing clarity or completeness.

It is a good idea to terminate your paragraphs with two carriage-returns. This will in effect put a blank line between this paragraph and the next when the paragraphs are printed in the letter. This gives a good visual appearance to the finished letter. The automatic spacing done by the program which deals with putting the signatory's name and title on the letter assumes there will be a blank line at the end of the last paragraph.

Once you are completely satisfied with the paragraph, press F2-SAVE to store your new paragraph, then press the Esc key to return to the Paragraph Library titles list. Now go through the same procedure for writing the other paragraphs of your sales letter.

BUILDING YOUR SALES LETTER

Your sales letter is constructed by bringing together the paragraphs you have just composed and developed. You may place the paragraphs within the letter in any order you choose. You do not need to keep to the order in which you wrote them.

Go back to the Letter Creation Menu and select Item 3 BUILD A NEW SALES LETTER. A Title Entry display now appears which is similar to the one for new paragraphs (text frames). Decide the order in which you wish the paragraphs to appear, then move the cursor to the one you have chosen to be first and press the Ins key to mark it. An asterisk appears to show that it is now marked. Now move the cursor to the paragraph you have chosen to appear second in your letter and mark that one. Do the same for the other paragraphs. Then press F2 to build the letter.

Press Esc to return to the Letter Creation Menu and then select Item 1 Sales Letter Library. In the library list you should now see a letter title 'NEW LETTER'. Move the cursor to this title and press the F4 key. Now overtype 'NEW LETTER' with an appropriate title for your new letter and press

the carriage return key to store it. Then press the Ins key to mark it and the F2 key to select it. The text of your letter should now be displayed in the text window.

CHECKING YOUR SALES LETTER

It is not the job of MARKETEEER'S Letter Writer program to print the finished sales letter complete with reference, date, name & address of prospect and name & title of signatory. Here, we can only view or 'test print' the main text of the letter. However, the test print facility does centre the text to the middle of the note paper where it will appear later in the actual sales letter itself.

Please press the F6-EDIT key. You can now use the PgUp and PgDn keys to scroll through the whole letter in order to read it and check it. At this stage, your sales letter comprises a simple concatenation of standard paragraphs - text which for the most part does not change. So normally you would now topicalise your letter by editing and adding to the standard text to make it relate more fully to the marketing or sales exercise of which it is a part.

MOVING TEXT AROUND

As you are editing your letter you may decide that you wish to change the order in which parts of it appear. To do this, move the cursor to the first of some lines of text you wish to move and press F3. The line goes red. Keep pressing F3 until all the lines you wish to move are red. Then move the cursor to where you want to put them and press F6. The marked lines then appear at their new location.

If the text you wish to move starts or ends with a partial line, move the cursor to where you wish to start marking and press the carriage return key twice. Then move the cursor to where you wish to finish marking and do the same. This isolates the text you wish to move. Then move the cursor back to the beginning of the text you wish to move and press F7 to tidy it into a paragraph. Then move it. Come back to where you moved it from and use F7 in the same way to tidy up that area of text also.

BOLD & UNDERLINE

Fashions come and go. One fashion in sales letters is the use (usually overuse) of bolding, underlining, banner headings and an ever-increasing list of other fanciful graphics tricks featured in printing devices. Use with caution: the more graphic finery you have in a sales letter, the less personal it looks and the less likely it is to be read by a recipient. It can easily look like a cheap brochure or leaflet and be 'filed' accordingly! It is better to leave image projection through graphic arts to an attached or enclose high quality brochure or leaflet.

However, Marketeer does provide normal bolding or underlining of key parts of the text in your sales letter. If you do feel the need to go overboard, Marketeer provides the facility for importing a letter text prepared on an external work processor or, if you are technically inclined, you can implant within the text the appropriate literal control codes for things like banner headings and type-style changes.

To embolden text, move the cursor to the start of the text you wish to embolden, press the Ins key, then, while holding down the Alt key, type the number 24 on the numeric keypad on the right of the keyboard. An upward-pointing arrow appears in the text indicating the point at which bolding will start. Then move the cursor to the end of the text you wish to embolden and do the same. To underline the text instead, type the number 25 instead of 24. Underlining is shown as a downward-pointing arrow. All this assumes that you entered the bolding and underlining control codes appropriate for your printer in the Configuration Section (Main Menu Item 9, submenu Item 3).

Once you have finished checking and editing your letter, press F2 to store it, and then go through the same procedure as you did at the beginning of this chapter when you printed our sample sales letter. Note the comments on the right below the text display window. This shows the advised maximum number of lines you should have in a letter for it to sit neatly on your company notepaper, and also shows how many lines are in your letter as it stands.

MARKETEER has been programmed to present perfectly formatted sales letters with adequate and balanced name & address and signature space top and bottom of the text. So if you exceed the advised maximum number of text lines, you may have to edit down one or more of your paragraphs. We think you will welcome this imposition when you see the final sales letters it disciplines you and your sales office into producing.

There is no technical reason why your letter should not flow over onto a second page - or even more. If it does, however, you will have to load the printer's automatic sheet feeder with the appropriate sequence of notepaper when doing a mailshot. For example, if your letter flows on to 3 pages, you will have to load the sheet feeder with a repeated sequence of one headed note sheet followed by two continuation sheets.

You will also have to put page break controls in the letter text to suit the artwork of your company notepaper. This is primarily why the letter editor has line numbers down the left-hand side of the text. To place a page-throw control character on the line on which you wish the page-break to occur, move the cursor to the beginning of that line, then, while holding down the Alt key, type the number 12 on the numeric keypad on the right of the keyboard. The page-throw character appears on the screen as a biology 'female' sign.

Now print out the letter as previously described, then please read it thoroughly to see how it hangs together. If you need to make any further changes, please edit the appropriate paragraphs and the letter as necessary and repeat the process.

Please remember that when you come to write your next sales letter, you can use any of the paragraphs you have already produced simply by including their numbers along with the numbers of your new paragraphs when you come to the 'BUILD A NEW SALES LETTER' procedure.

LETTER & PARAGRAPH DUPLICATION

Often when you need to send a quick letter or mailshot, one of the letters you use regularly is almost right, but not quite. In this case, get the letter that is almost right into the text window as if you were going to edit it, then press the F2-DUPL key. This places a copy of the letter concerned into the next spare position in the letter library and then automatically goes to that position so that the letter text displayed in the text window is now the copy which you can edit into the variant you require. Its title is automatically set in the Library List the same as the one it was copied from prefixed with an '&'.

Before you leave MARKETEEER'S Letter Writer, you might like to delete all our sample paragraphs to make room for the future paragraphs of other sales letters. However, please bear in mind that perhaps some of your colleagues may also wish to go through these exercises. If so, you had better leave them on file for the time being.

PRINT & DISPLAY FORMATS

The width of the text galley as displayed on the screen and printed in the finished letter, and the maximum number of lines allowed in a printed sales letter can be adjusted separately using Item 4. Please select Item 4. The values shown are those we have set up. They are what are normally the most suitable. However, you may change them if you wish by following the instructions on the screen.

IMPORTING FROM AN EXTERNAL WORD PROCESSOR

If you have some standard letters produced on an external word processor, you can import them into Marketeer's Letter Library as follows. 1) Make sure that the line width of the external letters is less than or equal to the line width settings within Marketeer (See previous paragraph). 2) For word processors which do not work directly on text files, get them to output the letter as an ASCII file [known also as a text file or print file]. 3) Select Item 1 on the Letter Creation Menu and move the cursor to a spare position in the Library List. Then press F4 and enter a title for the letter to be imported and press carriage return to store the title. Then press F5-IMPORT. The cursor moves to a new field beneath the Library List. There enter the DOS path and file name of the word processor file containing the text you wish to import. The text should then be in the appropriate position in the Letter Library. You can import a paragraph in a similar way.

This completes your introduction to MARKETEEER'S Letter Writer.

Eastern Business Systems "Marketeer": User Manual

Chapter 8: Sending Mailshots**INTRODUCTION**

Having produced the text of your first sales letter, the next thing to do is send it to someone. Since you have not yet put any of your own prospects on file, we shall go through the procedure for sending it to some of the 'sample' prospects which we placed on file for you prior to despatch.

Firstly, we shall print out the letter for just one individual whose name and address we shall retrieve from MARKETEEER'S files. Then we shall print a batch of letters addressed to a group of prospects falling within a special 'target profile' which we set up as a demonstration within MARKETEEER'S files before despatch.

FITTING THE SHEET FEEDER

Please take the Sheet Feeder attachment for your typewriter and fit it according to the instructions supplied with it. Place a half inch thick stack of A4 headed notepaper into the input hopper and release the bail bar. Place the stack of notepaper in the hopper so that it is upside down and facing away from you.

WHICH LETTER?

You will remember from the last chapter that MARKETEEER holds up to 40 sales letters on-file at any one time. Please select Option 3 'Letter Creation' from the Main Menu. Then from the Letter Creation Menu itself select Option 7 'Select Letter for Output'. Then select your new sales letter for display in the text window. When it appears, enter the MAIL command (or press F3). A message then appears above the text window saying that the letter has been copied into the output file. MARKETEEER'S Letter Printing sub-system takes the text of the current letter for printing as a finished letter or mailshot from this 'output file'. Now return to MARKETEEER'S Main Menu.

Now select Option 4 'Letter Printing' from the Main Menu. The Letter Printing Menu then appears. Please scan through this menu using the up-arrow and down-arrow keys and read the explanatory text for each menu option as it is highlighted.

THE SIGNATORY

Because certain people's signatures become somewhat illegible, it is normal practice with business letters to type in the name and job title of the sender at the very bottom with the intention that he should place his signature above it.

In order that MARKETEEER may do this automatically - whether for a single sales letter or for a specially targeted batch of sales letters - it is necessary to let MARKETEEER know what the sender's name and job title are. Naturally, since you wrote the sales letter which is now on file, you want to ensure that it is your name and job title that gets printed at the bottom.

So now please select Option 5. A display appears on the screen which shows my (the author's) name and job title. Instructions on how to overtype these with your own name and job title are given on the screen. The same overtyping, cursor control, insertion and deletion facilities are available to you here that were available when you were entering letter titles in the last chapter.

Please type in your name and job title according to the instructions given. MARKETEEER now stores your details in its appropriate disk file and returns you to the Letter Printing Menu. From now on, unless or until they are deleted or amended, your name and job title will appear on every sales letter produced by MARKETEEER. On a multi-user installation, each user's signatory and job title is stored separately. The name and job title appearing at the bottom of a letter is therefore that of whoever logged on to MARKETEEER (ie whose password was used) on the PC on which the letter is printed.

TO WHOM ARE YOU WRITING?

You are now ready to think of the addressees to whom you are going to send your sales letter. Options 1 and 2 offer you the choice of sending your letter to individually selected addressees or to all members of a target group. Please select Option 1 'Print Individual Letters'.

INDIVIDUAL ADDRESSEES

A blank name & address box now appears on the left of the screen and a kind of information box on the right in which is shown the title of the letter. Beneath are instructions for retrieving the name & address of an individual prospect from MARKETEEER'S database.

Please read these instructions. Then type HELP and read the explanation which appears on the screen describing how to retrieve a prospect's name & address.

FINDING A PROSPECT

1) Tell Marketeer his abbreviated name (known as his NAMECODE). Marketeer then searches its alphabetic index for someone with that NAMECODE. 2) Tell MARKETEEER whereabouts he lives (or works) by typing in his postcode (or as much of it as you know). For example, you may have forgotten his name, but you know he's somewhere in Blackburn, so you type BB. MARKETEEER then searches its geographic index for people in Blackburn. 3) Tell MARKETEEER his reference number (shown as 'Ref' on MARKETEEER'S displays). MARKETEEER then retrieves the prospect details held under that reference number.

Precisely what the NAMECODE and the Ref are, what they do and how they are used will be explained in detail in a later chapter. All we are concerned with here is using a prescribed NAMECODE as a means of retrieving the name and address details of a suitable target for your first sales letter without bothering at all at this stage as to what a NAMECODE is.

Just take it as read at this stage that the NAMECODE 'EBS' will cause MARKETEEER to come up with a suitable company name and address from its files. So please type in the letters 'EBS' and press the carriage return key.

MARKETEEER then goes through a search and load sequence as shown by the indicator 'lamps' after which the name & address details appear in the name & address box. A choice of commands: TYPE NEXT PREV QUIT HELP are presented. Please type HELP and read the explanations of what the other command words do. Then press the 'Esc' key to return to the original display.

TYPING THE LETTER

Now you are ready to 'send' your sales letter to this company. Please type-in the command word TYPE (or press the F1 function key). You are now prompted to switch on and set up the letter

quality printer (ie the typewriter). However, MARKETEEER checks immediately to see if the typewriter is on and available at this point. Since it is not yet switched on, doubtless an error message will be displayed on the 'Printer Msg' line in the box on the right of the screen. Not to worry. Switch on the typewriter and make sure that the pitch switch is set to 10cpi, the left margin is set to 10 and the line spacing is set to 1 as described in Chapter 7.

Feed the first sheet of paper from the sheet feeder using the insertion lever until it is almost all the way through. Then feed it through the rest of the way slowly using the carriage return key (on the typewriter's keyboard) until the automatic feed takes over. The next sheet is then fed in automatically and lined up correctly to begin printing the letter. Now put the typewriter 'ON LINE' as described in Chapter 7.

The prompt to switch on and set up the typewriter and the error message should both disappear and printing should commence. If an error message persists, press the 'Esc' key, recall 'EBS' again and then hit the F1 key again now that the printer is on and ready. If an error message is still present then the printer is probably set up incorrectly or connected incorrectly. Have you set the printer on-line?

While the letter is being printed, the text-stream passes along the Printer I/O line in the box on the right of the screen. This is to show that MARKETEEER is actually outputting the text to the printer I/O port. It is helpful as a diagnostic aid in the event of a printer fault or when the printer is remote or when printing is re-directed to a virtual printer in a network installation. When the letter has been printed, a message is displayed to this effect above the name & address box.

Once the 'completion message' is displayed, the computer can be used again - even though the typewriter is still typing the last letter. This means that you can get on with finding the addressee for your next letter, or even return to the Main Menu and get on with something entirely different without waiting for the printer to finish.

THE FINISHED LETTER

However, on this occasion, let us stop now and have a look at the finished letter. The first line begins with the letter's 'Ref' (reference). The reference on MARKETEEER'S sales letters is more complicated, but far more informative than the normal typist reference found on most business letters. It consists of an up to 4-digit number, a single letter, and a further 4-digit number.

The first number is the reference number of this particular prospect: that is, the number of the actual disk record within MARKETEEER'S files where his details are recorded. But furthermore, within the correspondence filing system we shall discuss later, it is also the number of the drop-file within your filing cabinet where his correspondence may be found. This means that you can find his correspondence file instantly when, for example, he telephones you unexpectedly.

The single letter in the middle of the reference is the sales area within which this prospect is located. The last number is the serial number of the letter. All letters typed and telexes or electronic mail messages sent by MARKETEEER are serial numbered in one unified serial number series.

Beneath the 'Ref' is the date of the letter (today's date). Then comes the name & title of your contact to whom you are writing, followed by the name and address of his (the prospect) company. Then comes 'Dear Rob,' followed by the text of the letter which you wrote earlier, 'Yours sincerely,' and your name and job title. Perhaps you would like to sign the letter now to see how it looks.

WINDOW ENVELOPES

Although normally thought of as being brown and containing bills, window envelopes can be both labour saving and attractive for sales letters. Firstly, they alleviate the need for envelope addressing or the printing and sticking on of address labels. And in good quality white livery with additional artwork, they can be made to carry sales letters in fitting style.

Please mark two dots on the letter - one each side - 99mm down from the top. Then fold the bottom edge upwards to come level with these two dots. Now turn the letter over and fold the top third backwards so that the top edge of the letter is along the first fold. The letter should now be folded in three in a zigzag with the name and address facing outwards. MARKETEEER positions the name & address so that when the letter is folded in this way, it shows correctly through a standard window envelope opening. A handy aid for folding letters in this way is a pencil line (or a couple of short lines) 99mm from the step between the return unit and the main part of your desk. You can then place your letter on the return unit, slide it up to the step, and the line will show you where to make the first fold.

Alternatively, if you wish to enclose an A4 or A5 size brochure with your letter, you may leave your letter unfolded or fold your letter in half respectively. Suitable full A4 and full A5 window envelopes are available. These have their windows in the appropriate positions to present the destination name and address as printed by MARKETEEER on your sales letter.

DEGREE OF FAMILIARITY

Notice that the name & title of contact appears at the bottom of the name & address box on the screen. Notice also that beyond the contact's name 'MR R J MORTON' is his first name in brackets '(ROB)'. If we had not put '(ROB)' in there, the letter would have been printed 'Dear Mr Morton'.

The brackets tell the Letter Printer program that the contact is to be addressed as what they contain. Otherwise it uses the formal name. If no contact name is present in the name & address box, the letter is begun 'Dear Sirs' and is terminated 'Yours faithfully'. Typing in these special details along with a prospect's name & address is discussed in a later chapter.

A UNIVERSAL FORMAT

MARKETEEER centralises the actual text of the letter between the folds - ie in the centre third of the note paper. This leaves the bottom third for the 'Yours whatever,' and your signature. The result is a letter of pleasing appearance giving the impression of professionalism and credibility.

MARKETEEER formats your sales letters in the style generally preferred today by typing schools and business colleges - ie with the reference, date, name & address, salutation and name & job title of signatory all hard against the left margin, with no indentation at the beginnings of paragraphs, and with a blank line between paragraphs. Because this is now such a universal standard, we have not complicated MARKETEEER by building in superfluous facilities for altering it.

LETTER HEADING DESIGN

This letter format offers excellent opportunities to the letter heading designer for projecting your 'corporate identity' in that it provides a good 90mm square of space at the top right of the note paper for your company logo, name & address, telephone & telex numbers, electronic mailbox numbers and so on.

If the artwork on your present company note paper does not sit nicely together with this letter format, it may be a good time to think about a re-design or even of having a special design done for sales letters.

What designers often neglect is the possibility of using the 90mm square of space at the bottom right of the paper opposite the left justified signature! Because it centralises the main text, MARKETEEER ensures that this lower square is also available for letterhead artwork. Apart from directors' names and company & VAT registration numbers, the lower square is useful for listing your company's products and services, and even sales promotion messages.

Think also about what happens when your letter is received. Some firms like to stamp a letter with the 'date received'. A prospect may also like to make quick notes on it either as a reminder to himself or as a message to a colleague to whom he may direct or pass on your letter. Such actions are good for you, so please have your letterhead designers leave some white space within the 90mm square at the bottom right so that your prospects have a convenient place to make their notes or use their rubber stamps.

You may already have headed paper on which the artwork encroaches into the standard area reserved for the name & address of the recipient. To allow you to use MARKETEEER initially with such notepaper, Option 4 of the Letter Printing Menu is provided to allow you to lower the height at which MARKETEEER starts typing the letter on the notepaper by up to 9 lines. However, the name & address will then no longer align with a standard envelope window and the letter will no longer have a balanced appearance.

SCANNING THROUGH THE PROSPECT FILE

You might now like to type in 'NEXT' or 'PREV' (or alternatively press the right or left arrow keys respectively) in order to scan through some of our 'sample' prospects in the records alphabetically adjacent to the one for which you printed out the sales letter. You may, if you wish, 'TYPE' sales letters to some of these people also - just as an exercise.

When you have finished, please press the 'Esc' key. You have now returned to the display at which you typed in the NAMECODE of the prospect to whom you sent the first sales letter. You could, if you wished, call up another prospect individually from MARKETEEER'S database, but you would have to know his NAMECODE, POSTCODE or Ref first! Press the 'Esc' key again now to return to the Letter Printing Menu.

A TARGETED MAILSHOT

We must now introduce the concept of the 'profiled target'. This is a group of prospects within MARKETEEER'S database who share a certain restricted set of key values. For example, they are limited in terms of where they are located (sales area or postcode area), they must have one of a specified limited set of possible business RELATIONSHIPS with you. They must be of a particular STATUS, and so on.

We shall go into detail on how to specify a complete 'target profile' in a later chapter. Let it suffice for the time being that, prior to despatch, we placed a sample 'target profile' within MARKETEEER'S database specially for demonstration purposes. We shall now use this profile to target a batch mailshot at all the prospects currently on file who fit within it. You should end up with three of our 'sample' prospects out of the whole database. So please select Option 2 'Print Targeted Mailshot'.

AUTOMATIC PRINTING OF SALES LETTERS

The screen format for TYPing sales letters appears again, but this time, instead of a name & address in the box, there is a message saying that MARKETEEER is ready to start printing the mailshot. In the right hand box at the bottom is shown the number of addressees in the target list and other details identifying the list. Hit F1. The rest is now automatic. MARKETEEER loads the details of each prospect on the mailshot list in turn and then prints a sales letter addressed to him. As each letter is finished, it is ejected into the output hopper and a new sheet of note paper is set up for the next letter. When all the letters have been typed, a message is displayed telling you so.

In the event that you need to halt the automatic letter printing sequence temporarily, set the typewriter off-line. You may then set the typewriter on-line to re-start the sequence from where you left off. If you want to abort the sequence altogether, press the 'Esc' key. You will then be returned to the Letter Printing Menu on completion of the letter currently being typed.

Halting temporarily in this way can be useful in the unlikely event of your notepaper becoming jammed in the typewriter during a long run.

It is also useful if the telephone rings and you wish to stop the noise of the printer while you deal with the call. The abort option is useful should you discover that you are making a printout which on second thoughts you decide is not according to the profile you would prefer. The abort option is also useful if you wish to break off for lunch or to go home at night in the middle of a marathon mailshot printout. The next time you enter the Mailshot option, printing will automatically commence from the addressee following the last one for whom a letter was printed last session.

MAILSHOT REPORT

Please return to the Letter Printing Menu. After any mailshot print session, you can ask for a mailshot report which gives the text of the letter followed by a list of addressees for whom a letter has been printed and the date it was printed. For partly finished mailshot printouts, those addressees for whom a letter has not yet been printed have no date against their names & addresses. This report is invoked by selecting Option 3. Please select Option 3 now and follow the on-screen instructions for printing the report. When the report has been printed, study its content carefully. Normally you would file this report away for future reference as to who was included in this mailshot.

REMOVING THE SHEET FEEDER

At this point, it is expedient to remove the sheet feeder from the typewriter and put it away in a cupboard where it will be protected. Remove the sheet feeder by pressing the two black 'release knobs' each side of the feeder and lift the feeder off. Then replace the plastic paper support. The typewriter may now be used for printing out single sales letters again or for general office work.

THE TARGET PROFILE SERIAL NUMBER

You will notice that each of the letters in the targeted batch that has just been printed has an additional 2-digit number and 4-digit number inserted between the sales area letter and the letter's own serial number. The 2-digit number is the number of the Target Profile specification used to form the target list for the mailshot and the 4-digit number is the serial number of the target list itself.

How to set up a Target Profile is covered in a later chapter. Briefly, MARKETEEER can hold up to 18 target profile specifications numbered 1 to 18. This is the extra 2-digit number. Each target profile specification can be used as a template for extracting a target list of prospects from those currently on file in MARKETEEER'S database. Each time a list is extracted, MARKETEEER assigns a serial number to it. This is the extra 4-digit number.

The Target Profile Number and List Serial Number, as they appear in a letter reference thus effectively tell you the sector of your market of which the recipient is a member, and hence, the mailshot of which the letter was a part. This is extremely useful when recipients respond by telephone unexpectedly. You are able to identify the situation quickly and respond to him more coherently than you would otherwise be able to do.

PREPARING LETTERS FOR POSTING

All that remains to be done now for a normal mailshot is to fold the letters and put them in their envelopes. You can put them in window envelopes as described, or you may instruct MARKETEEER to produce a corresponding set of sticky address labels. We shall discuss the production of address labels in a later chapter.

AUTOMATIC EVENT UPDATE

Every time a letter is typed out for mailing to a given prospect, that event and the date when it occurred is recorded within MARKETEEER'S Prospect Record for that prospect. Distinction is made between a one-off letter and one which is part of a mailshot.

This completes your introduction to MARKETEEER'S Letter Printer. Please use the procedures described herein when you come to do your real mailshots. Please press the 'Esc' key to return to MARKETEEER'S main menu and then switch off your typewriter.

Eastern Business Systems "Marketeer": User Manual

Chapter 9: Telephone and Telesales**INTRODUCTION**

As well as the sales letter, the telephone call is also a powerful means through which contact with a sales prospect may be established and maintained. Indeed, far from being alternatives, the sales letter and the telephone call may be used as mutually supportive contributors within an overall scheme.

The telephone call has so far been the traditional means of following up a mailshot. A newer approach, however, now puts the telephone call in the front line as the initial means of contact. This approach is known under the title of 'telephone sales' or simply 'telesales'.

Using the telephone for your first approach has certain advantages. It gives you immediate contact with the current decision maker at a personal level. It enables you to assess instantly his needs and likelihood of becoming a customer. It saves you the cost and trouble of sending unwelcome literature to someone who simply has no use for what you are offering. It saves him the disposal problem on what he regards as more 'junk' mail and a possible bad regard for you the sender.

But although people in business generally appreciate being kept informed on products and services relevant to their endeavours, telesales can be potentially offensive and regarded as encroaching too much on personal privacy if it is not handled skilfully. To guard against this, many organizations using telesales work from carefully prepared multi-option scripts which are written and approved long before telephoning begins.

Using the telesales method of phoning first and sending mail afterwards ensures that your sales letters and their accompanying literature are expected and welcome. Because they arrive 'by invitation' they should also receive better attention and more favourable consideration than cold unsolicited mail.

MARKETEER'S telesales facilities enable you to make telephone calls to individuals at random, or to each individual in turn within a specially profiled target group. To initiate a call, you simply type in the command word 'DIAL' or alternatively press the F5 function key.

METHOD OF DIALLING

MARKETEER'S Telesales Facility can be set up to enable you to obtain your calls in one of two ways according to the equipment you currently have attached to your computer. In the first case, you have to dial your calls manually. In the second case a modem dials them for you automatically from the telephone number given to it by the computer.

For manual dialling, you do not need any communications equipment connected to your computer. The name, address and telephone number of each prospect on your calling list is displayed in turn on the screen. You then make your telephone call simply by dialling the number shown. For automatic dialling, a modem must be installed in your computer and connected in parallel with your telephone. In this case, you simply enter the DIAL command (or press F5) to dial the call.

A telephone headset which is plugged directly into your telephone will prove very useful during long telephone sessions since it leaves you with both hands free to use the computer and make notes.

MARKETEER presents the details of each prospect you wish to call in the name & address box on the screen. Within this box is shown the prospect's telephone number. At your command, the modem dials this number automatically and then switches the call through to your headset. It then waits for you to indicate the end of your call, whereupon it disconnects both itself and your headset from the telephone line.

From the Main Menu, select Option 5 'Telephone'. The Telephone Menu then appears. Scan down the menu using the up-arrow and down-arrow keys and read the explanatory text on each menu option.

SELECTING THE METHOD OF DIALLING

The method of dialling as currently set up is shown on the top right of the screen. If you have a modem installed then it should be set to automatic, otherwise manual. If it is incorrect, select Option 4. The dialling method then toggles (changes to the other setting). MARKETEER then records the new setting on disk. It therefore remains in force until you change it again using this option. You are still in the Telephone Menu.

Even if you are equipped for automatic dialling it is still useful to read about the manual method and vice versa. This is because, in the event that the modem should become faulty, you can instantly reconfigure to manual dialling. Conversely, if you are on manual dialling, you can become informed ready for when you get a modem.

ONE-OFF CALLS

Please select Option 1 'Make one-off phone calls'. A blank name & address box now appears on the left half of the screen and a Call Result Options box on the right. Below, you see the instructions for retrieving the name & address details of a prospect by typing-in his NAMECODE, POSTCODE, or Ref number.

You are now ready to type-in the NAMECODE, POSTCODE or 'Ref' number of the prospect you wish to call - ie the 'addressee' for your telephone call. Why not call us? We should be pleased to hear how you are getting on. Please therefore type-in the NAMECODE 'EBS', and then hit the carriage return key.

After the expected search time during which MARKETEER scans through its database index to find us, our name and address appears in the box on the screen. Beneath the box is a list of five command words which you may use to determine MARKETEER'S next action. The familiar 'NEXT' and 'PREV' command words are there as seen before in Chapter 8 for scanning forwards or backwards respectively to the next or previous prospect record. Please type 'HELP' and read the explanations of what the other command words do. Then press the 'Esc' key to return to the name & address display.

Notice that the command word 'TYPE' which you saw in Chapter 8 when typing sales letters is now replaced by the command word 'DIAL' which is for initiating a direct telephone call to the prospect whose details are currently shown within the name and address box on the screen above.

As soon as it has finished loading the prospect's name & address details, MARKETEER checks that a valid telephone number does exist in the prospect's record as displayed in the name & address box on the screen. If no telephone number is shown, or if what is there is not a valid telephone number, MARKETEER displays a message telling you so and informs you that it cannot therefore continue with dialling the call.

Assuming, therefore, that we have a valid telephone number, please type-in the command word: DIAL (or press the F5 key). The command words now disappear and what appears in their place depends on the method of dialling you have.

MANUAL DIALLING

In the case of manual dialling, a message now appears asking you to dial the telephone number shown within the name & address box above. Below this is a message telling you to press the space bar when you have finished the call. So now please pick up your telephone and dial this number.

Forget MARKETEEER for the time being and concentrate on your telephone call. When you have finished, hit the space bar as prompted. You should then look at the list of Call Result Options.

Please select the option which applies to the call you have just made. If you indicate that you actually got through to the called number (ie you selected one of the first 5 options), MARKETEEER records the fact that a telephone call has been made to this prospect on this date. The Call Result Options will be explained in more detail later.

You are now back at the command word entry field. From here, you are free to scan to the next or previous record, return to the NAMECODE/POSTCODE/Ref recall display to recall the details of someone else, or even dial the same person again!

AUTOMATIC DIALLING

If you have a telephone headset, please put it on. Now type-in the command word 'DIAL' (or press the F5 key) as described for manual dialling. The 'DIALLING' lamp at the top right of the screen then lights to show that the modem is dialling the call. A message appears at the bottom right of the screen telling you to pick up your phone when the tone sounds. When dialling has finished, you will hear the tone. The 'DIALLING' lamp then goes out and the 'HOLDING' lamp lights. The modem is now holding the line open to give you a chance to pick up your phone or put your headset on line. It will continue to hold the line for half a minute or so, or until you terminate the call by entering the 'KILL' command or pressing the 'Esc' key.

IF A FAULT OCCURS

If the modem cannot make sense of the number given to it, or if there is an incoming call on your line, it does not attempt to dial the call. In such an event, an appropriate error message is displayed above the Call Result Options box. If the message indicates anything other than an invalid phone number of an incoming call, then check that the modem's line cord is plugged into a BT socket. If this is not the reason, report the message to your dealer.

PROCEEDING WITH THE CALL

If all is well you should hear the ringing tone in your headset and the called prospect should answer. While talking to your prospect, you can make notes pertaining to the call. Please enter the 'NOTE' command (or press F7). A 12-line diary then appears with today's date stamp in the left column. You can enter brief notes here before you make the call, during the call, or after the call. Follow the editing instructions below the box. When the box becomes full, the oldest note (the top one) is lost to make room for a new one at the bottom. A rolling diary of your last 12 contacts with this prospect is thus maintained automatically.

You terminate a call by entering the 'QUIT' command or by pressing the F2 function key or the 'Esc' key. You are then asked to select the Call Result Option. Please select the option which best describes the result of the call you have just made. If you indicated that the call was successful (ie you selected one of the first 5 options), MARKETEEER then records the fact that a telephone call has been made to this prospect today. This information is stored in this prospect's own data record within MARKETEEER'S disk files for later reference.

You are then back in the command word field. From here, you may scan to the next or previous record to make other phone calls, or you may press the 'Esc' key to return to the record retrieval display from where you may type in the NAMECODE, POSTCODE or Ref of someone else you wish to call or you may press the 'Esc' key again to return to the Telephone Menu.

This completes your first exercise in making telephone calls to individuals, so please now press the 'Esc' key twice in succession to take you back to the Telephone Menu. At this point, you might like a break, or you may wish to carry on. Either way, you know the procedure by now!

RESULT OF A TELESales CALL

With targeted telesales sessions (ie a one-after-the-other telephone session to a group of prospects making up a particular telesales target) MARKETEEER monitors the outcome of each call and compiles it into a Call Session Report at the end of the calling session.

Therefore, before attempting a targeted telesales session, let us consider in more detail the possible results of a telephone call mentioned earlier. Please select Option 3. You now see a display of 9 possible results of an attempt to make a telephone call. The first 5 state the degree of success of a person-to-person contact, while the last 4 relate to telephone line conditions which result in call failure.

You are able to use this option to change the wording of these call result descriptions to suit your preferences. However, please note that whatever you call these results, the first 5 will result in MARKETEEER counting the call as having been made, whereas any of the last 4 results will cause MARKETEEER to offer you another attempt at making the call after you have been through all the others on the current calling list. The 9 possible call results are discussed individually below:

1. Decision Maker Contact

This is where you have actually spoken to the person you intended to speak to who has the power and authority to give you an order for what you are trying to sell to him. Thus you have just made a successful telesales call.

2. Alternative Decision Maker

This is where although you could not reach the decision maker whose name you had been given, nevertheless, you have spoken to somebody who also has the authority to initiate purchase orders.

3. Decision Maker's Personal Assistant

You have got as far as the decision maker's secretary. Some telesales people actually start off by asking to speak to the decision maker's secretary. Then, once they have established a sympathetic rapport with her, they ask her a question she can't answer. That's how they get to speak to the boss with his secretary's approval! Remember, a secretary can often have quite an influence on the purchasing decisions of her boss!

4. Non-decision Maker Contact

This is usually a far less effective telesales call. However, if the person you have managed to speak to is somebody whose technical advice the decision maker respects, then it is a very good foundation on which to call back in a later attempt to reach the decision maker.

5. Telephonist Only

An unsuccessful call, but perhaps useful for finding out names of decision makers and decision makers' advisers.

6. No Answer

This is where the prospect's phone has been ringing for such a long time with no answer that you decide to hang up. BUT BEWARE! YOU WILL STILL HEAR A RINGING TONE EVEN IF YOUR PROSPECT'S PHONE IS OUT OF ORDER, SO DO NOT ASSUME HE IS NOT THERE OR THAT YOU HAVE A WRONG NUMBER.

7. Line Engaged

This is where the engaged tone is heard. It can mean that either the called number itself is engaged or that there are no trunk lines available between you and the number you are calling, in which case the number itself could well be free. In fact there is a slight difference between the 'subscriber engaged' tone and the 'no trunks available' tone, but not many people recognise this difference.

8. Number Unobtainable

This is where you hear the 'unobtainable' tone. It can occur either because the number given in the prospect's record is no longer in use, or because the number received by the exchange's dialling equipment was not recognizable as a valid telephone number. In the latter case, the number you dialled could have become garbled somewhere between your fingertips and the exchange's dialling receiver. So hearing the unobtainable tone does not always mean the number is unobtainable.

9. A Fault Condition

This can be for example where you hear nothing at all (a dead line). If you get a dead line instead of the dial tone when you first pick up your phone, it usually means that your exchange has run out of available dialling receivers because so many people are making calls. In this case you should simply try again a little later. A dead line after dialling means that the exchange has run into unusual difficulties in routing your call. Eventually, the 'unobtainable' tone should come on. Another example is when you break into a conversation between two other subscribers in which case you should report the fault to TELECOM.

The numbers of calls made in each session of each of the above result-types are given at the end of the Telesales Session Report printed at the end of each session. This information gives you a measure of the effectiveness of each session. Please press the 'Esc' key to return to the Telephone Menu.

MAKING CALLS TO A TARGET GROUP

MARKETEER's telephone facility really comes into its own when used to 'hit' a specific target group of prospects with a telesales campaign. Please select Option 2 of the Telephone Menu. You now see the familiar name & address box containing details of the first prospect on the calling list.

The Call Result Options box is on the right as before but now also contains details of the target list. There is also a message in the bottom right of the screen telling you that this prospect has not yet been called since the current calling list was generated.

Whenever you enter Option 2 in this way, the name & address first displayed is that of the first prospect on the list who has not yet been called. So if you did not get around to calling everybody on the list during your last telesales session, or you could not get through to some of them, you are automatically placed to call the first one who was not called last time so that you can effectively continue your telesales session from where you left off.

As you call each prospect, as well as the call event being recorded in the individual prospect's event record, the result of the call is also recorded on the calling list itself. This is how MARKETEEER knows where to start from in order to continue from where you got up to in the calling list last time. This information is also used to produce the call session report to be discussed later.

You can make diary notes before, during or after each call as before. On completion of each call, the Call Result Options display shows the list of 9 possible call results discussed earlier. You then select the appropriate result for the call you have just made. The ones you see here are the ones we have set up. However, Option 3 allows you to change these items to suit your own circumstances and preferences.

After each call, MARKETEEER records the 'call result' you have selected onto its calling list ready to be printed out later in the Telesales Session Report. If you indicated that the call was successful (ie you selected one of the first 5 options), MARKETEEER records the fact that a telesales call has been made to this prospect today. This information is stored in the prospect's own data record within MARKETEEER'S disk files for later reference.

NEXT/PREVIOUS CALL

The NEXT and PREV commands in this case allow you to scan to the next or previous prospect ON THE CALLING LIST: not the next or previous in the NAMECODE, POSTCODE or Ref indexes. Therefore, after each call, you advance to the next prospect on the calling list by entering the 'NEXT' command (or pressing the F2 key). If you decide that you don't want to call that prospect (ie you want to skip over that prospect), then you simply advance to the NEXT one after that. If while scanning around the calling list you encounter prospects who have already been called, the message in the bottom right of the screen states the date and time they were called.

Of the prospects within our test group, try calling some and skipping some at your own discretion. Whatever the result of the call, MARKETEEER always records the final outcome and then allows you to advance to the next prospect on the calling list.

CALL SESSION REPORT

When all prospects on the calling list have been called or skipped, return to the Telephone Menu and select Option 5 'Print Call Session Report'. Then switch on the draft printer and follow the on-screen instructions for printing the report. This report lists each prospect on the calling list, giving for each the result of the last call made to him and the time and date of the call. This enables you to see who was called and who wasn't and why. A summary of the number of calls with each possible result is given at the end of the report. When the report has been printed, return to the Telephone Menu and then study the content of the report. Option 6 allows you to print only the call results summary at the end.

This completes your 'hands-on' introduction to MARKETEEER'S telesales facility. So now please switch off your draft printer.

PLANNING YOUR TELESALLES CAMPAIGN

If you are planning to use this facility for 'front line' telephone selling, now is perhaps a good time to prepare the script for you or your 'phoners' to use when you come to make your phone calls. A carefully designed script is vital in order to make your telephone presentations as perfect, consistent and reproducible as your sales letters, advertisements and brochures.

But telesales scripts are not straight forward texts to be read through from beginning to end over the telephone. Once you have made a short opening oration to your prospect, the next part of the script you read must depend on his reaction. This means that you must be able to jump from one 'paragraph' to another without being confined to one strict sequence. Yet, the sequence you follow in any instance must be one of a predetermined set of permitted options.

It is helpful to have each 'paragraph' typed out on a separate piece of A5 size card which is protected in a clear plastic cover. The top half of the card shows the script that you are to speak, while at the bottom of the card is a set of 'IF' statements of the form 'IF THE PROSPECT SAYS SUCH AND SUCH, GO TO CARD NUMBER SO AND SO'. The cards can then be punched for placing in a ring binder to allow you to flip easily from card to card while you are actually in conversation.

Furthermore, in order both to monitor the results of your calls and to record ways in which the script might be improved, it is necessary to have 'call record' cards designed so that you can fill in these results each time you make a call. Then, after a 'post phone session' meeting with your colleagues to discuss the results of your phone calls, you can update the on-file information for the prospects involved within MARKETEEER'S database. How to do this will be discussed in a later chapter.

MARKETEEER purposely does not provide the facility for a 'phoner' to change details about individual prospects within the database during a phoning session. Experience shows that this generally leads to disaster. It is necessary to think about and consider each amendment to on-file information while not under the pressure you are under during a sales or marketing telephone call.

When designing your telephone script, you must bear in mind that it is going to be listened to rather than read. It must invoke an active response rather than be passively absorbed. The telephone script is therefore quite different from the text of a sales letter or the copy for an advertisement. Producing it requires not only your knowledge and experience of what you are selling, but also the style and technique of a professional telephone script writer.

This is not unreasonable since you probably use a professional copy writer for your press releases and advertising copy, and a professional graphics designer for your 'corporate identity', your advertisements and your product brochures. So why not get in touch now with one of the professional 'telesales' agencies and have them design a telephone script for you.

If you are new to telephone selling, or you wish to branch out into a new market, it could be advantageous for you to hire the services of a telephone sales agency not only for producing the initial script, but also for blazing the telephone trail for you in a blanket telephone campaign to obtain a shortlist of reasonably well profiled prospects. You could then put these onto MARKETEEER and follow them up in greater depth and carry them through to final conversion into customers.

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Chapter 10: Telex and Data Comms**IMPORTANT**

For the telex, electronic mail and FAX features described in this chapter to operate, your computer must be fitted with the modem discussed in Chapter 4.

CONVENTIONAL MAIL

When you send a letter by conventional mail, you first dictate or write down what you want to say and then have it typed. Then you sign it, put it in an envelope and post it. The Post Office then carries your letter physically to the premises of the person to whom it is addressed. The recipient then opens the envelope and reads the letter.

However, physical mail takes a long time to reach its destination - particularly if coming into the United Kingdom from a foreign country. Therefore, faster means for transmitting the written word have been the subject of much research and development for a long time.

TELEX

The first attempt to apply electronic speeds to the transmission of printed messages was the Telex Network. This is a switched circuit network similar to (but much smaller than and completely separate from) the Public Telephone Network.

To send a message by Telex, you first have to type it out on a Telex terminal which records it onto punched paper tape (or onto some form of electronic memory or magnetic medium).

You then have to dial up a connection to the Telex terminal of the person or company to whom you wish to send the message. A circuit connection must be established through the Telex Network between your terminal and the recipient's terminal. If the recipient's Telex line is engaged, you have to try again later as you do with a telephone call.

The fact that you need an actual circuit connection between the sender's and recipient's terminals in order to send a Telex message means that the sender's terminal and the recipient's terminal must be available at the same time to handle any particular message. This can cause delay and frustration to the sender when the recipient's terminal is very busy handling other messages.

Also, because of the high cost of the Telex service, each Telex terminal is shared by a large number of individuals. The Telex terminal inevitably becomes subject to an internal bureaucracy which effectively imposes a long delay between the individual originator or recipient and the terminal itself. The inland Telex can thus end up being no faster than the ordinary mail.

However, Telex has been around a long time, and the technology, speed and efficiency of the service is improving. There are over 100,000 Telex subscribers in the United Kingdom. Telex is therefore a significant, established and on-going means of communicating with a vast market. For this reason, MARKETEEER enables you to send sales messages both to individuals and profiled target groups of prospects by Telex.

ELECTRONIC MAIL

When you send a letter by electronic mail, you first dictate or write down what you want to say as before. You then have it typed into a terminal. From there it is transmitted through the public telephone network to the appropriate Public Electronic Mail Service. There it is placed in the addressee's electronic 'mailbox' from where he can view it through a terminal at his own premises.

In the context of MARKETEEER, the term 'electronic mail' refers to a proper public electronic mail service such as that provided by Mercury Link 7500 or Telecom Gold which enables independent people and organisations to communicate with each other by electronic mail. This is sometimes referred to as a 'wide area' electronic mail network. It is distinct from a private electronic mail service (or 'electronic memo' service) operated on a local area network (LAN) within and between a company's own offices.

Electronic mail is much faster than conventional mail. However, you cannot sign an 'electronic letter' and it won't be printed out at the other end on your own notepaper. But although it cannot thereby have quite the same visual impact as a conventional sales letter or the personal intimacy of a telephone conversation, it does possess the unique quality of combining the immediacy of the telephone with the precision and accuracy of the written word.

This makes the 'electronic letter' able to fulfil a valuable role within the selling process which has previously been impossible, namely that of providing an instant hardcopy follow-up to a telephone conversation which can arrive on the prospect's desk almost as soon as he puts his phone down.

This is invaluable for responding to a sales enquiry with instant formal product details and prices, for crystallizing the facts mentioned in a telesales call, or simply as a courtesy note.

Thus you can see that an electronic mail facility offers you a tremendous speed advantage over your competitors whether in maintaining a strategic presence, closing an important deal, answering a query, or winning an all-out tendering race!

A public electronic mail service also gives you faster and more convenient access to the Telex Network. It enables you to send a Telex message (or even a batch of Telex messages) all in one go without having to establish a direct circuit connection with the recipients' Telex terminals. The electronic mail service's computer stores all your messages within its own storage and then sends all the messages on for you afterwards. This method is also considerably cheaper than having a Telex line.

To enable MARKETEEER to send your sales messages to prospects who subscribe to an Electronic Mail service, you simply enter their electronic mailbox number in braces (curly brackets) on the 'Telex' line of their name & address box. If they do not subscribe to an electronic mail service but are Telex subscribers, then provided you are using Mercury Link 7500 you enter their Telex number and answer back code there instead. If you wish to use another electronic mail service for sending telexes, you have to enter each prospect's telex number as a special form of mailbox number as decreed by the service concerned.

Since electronic mail equipment can be attached to any conventional telephone line, the potential for its growth is as great as for the telephone itself. As technology, competition and demand drive terminal equipment prices down, so more businesses and individuals will become equipped for sending and receiving electronic mail. So although numbers are now few, they will soon explode. And MARKETEEER is fully prepared for this explosion!

But with so few current subscribers to electronic mail, how can MARKETEEER'S electronic mail facility be useful now? The answer is that it is useful in any situation where you have an established

relationship with whoever is at the other end. For example, you could use it for sending updates to product details and prices to your dealer network or group of franchisees. Or you may use it simply as a means of fast communication with other offices within your own organization.

With dealers or franchisees, you could make being equipped for electronic mail a part of your dealership or franchise agreement. Perhaps you could offer to pay part of the cost. But whatever the limitations to its present use, the advent of universal electronic mail is almost upon us. When it comes, electronic mail will be able to reach almost anybody - at least, anybody in business. At that time, subscriber directories for electronic mail will be readily available in the same way that telephone directories are today. Businesses will then put their electronic mailbox numbers on their official notepaper as they now do with telephone and telex numbers.

The 'Electronic Mail & Telex' facility deals only with outgoing telex & electronic mail. It does not handle incoming messages. This is because its task is primarily to identify your target group and then 'hit' the whole group with a standard telex or electronic mail sales message. However, once people respond, whether by letter, phone or electronic mail, they have to be dealt with individually. Received messages are therefore handled through MARKETEEER'S Communications Terminal to be discussed later.

SETTING UP YOUR NAME & ADDRESS

Before selecting Option 6 for sending electronic mail, there is a small 'once & for all' job which you must do first. For this you have to use Option 1 'Prospect Records'. So once the main menu appears on the screen, please select Option 1.

Because electronic letters and telexes are not printed out at the other end on your own notepaper, it is necessary to include your company's name, telephone number, electronic mailbox number and so on as part of the text. To do this, MARKETEEER needs an internal record of these details for your company. This internal record is in fact Prospect Record No 1. You must therefore enter yourself (ie your own company) as Prospect No 1 on MARKETEEER'S database. The familiar name & address box now appears beneath which are the also familiar prospect record retrieval instructions. A note at bottom right tells you to put your own name & address details in Record 1. Please type-in the number 0001 and press the carriage return key. The contents of Record 1 are then displayed in the name and address box. Ignore what appears in the CLASSIFICATION & STATUS box.

Now press F6 to edit the name and address, then overtyping the name and address in the box with your name and address details including your telephone number, telex number and electronic mail number according to the editing instructions beneath the box. Enter your NAMECODE as 'AAAAAAA' and ignore the XREF field. Then press the 'End' key to store the record and return to the main menu. Any name & job title entered here will be ignored. For telex & electronic mail letters, MARKETEEER uses the name & job title of signatory which you enter using Option 6 of the Electronic Mail & Telex Menu. This will be discussed later.

COMPOSING YOUR ELECTRONIC LETTER

The different nature of its transmittal medium, makes the 'electronic' letter (or telex) better suited to a follow-up rather than a front-line role. This requires a different approach to its content. Its text should comprise an element of thanks for previous attention during a telephone conversation, plus a straight forward listing or statement of the relevant facts, including your offer and your request for action.

At this point, please take a break from your study of MARKETEEER and apply some thought to composing a text for your 'electronic' letter. This should be about the same length as for your ordinary sales letter, although its slant must be somewhat different. Bear in mind that, unlike with an ordinary letter, the instancy of electronic mail allows you to put in such things as 'please call us now - our experts are manning the phones until 4.30pm this afternoon to answer your queries first-hand'.

Having got a good idea as to the desired form and content of your 'electronic' letter, there is one further job to do before we actually get into sending electronic mail. From the main menu, please select Option 3 'Letter Creation' as you did in Chapter 7.

Follow the method described in Chapter 7 to type in the text of your 'electronic' letter paragraph by paragraph. Then develop and perfect the wording as you did for your original sales letter. These additional paragraphs will be automatically given new paragraph numbers and will co-exist on file with the paragraphs of your original sales letter. When naming these paragraphs in the 'index', prefix their names with 'E/M' to show that they are part of the 'electronic mail' letter.

You must now 'build' these paragraphs (or text frames) into your complete electronic mail (or telex) message. So please select Option 5 to build the message from its component paragraphs. When you have finished, use Option 7 to view the complete message. Print it out as well if you wish. If you are satisfied with it, copy it into the Output File as you did in Chapter 8 with your sales letter. Now return to the Main Menu.

SETTING UP FOR ELECTRONIC MAIL

From the Main Menu, please select Option 6 'Telex & Data Comms'. The Telex & Data Comms Menu now appears. Please ignore the right hand side of the screen for the moment. We shall now concern ourselves with Options 4 to 7 of this menu which normally have to be dealt with only once when initially setting up MARKETEEER.

Use the down-arrow and up-arrow keys to scan these options, reading the explanatory text on the right as each option is highlighted.

Communications Services

Please select Option 4 'Communications Services'. A box now appears on the right with the names of some of the public electronic mail services, Value Added Network Services (known as VANS) and other data communications services. If the service or services to which you subscribe are already on this list, you do not need to enter anything further here. If you do not find a service to which you subscribe, then enter its name on a spare line according to the editing instructions given below the box. Make sure that the names of all the services to which you subscribe appear on the list.

Service Protocol Macros

Now select Option 5 'Service Protocol Macros'. Another menu now appears made up of the names of the services entered using Option 4. Please select from this menu the number of the service to which you subscribe that you wish to use for sending telexes.

In the display that follows, the prompts shown on the left are what the service sends to MARKETEEER during an electronic mail or telex sending session. The responses or commands on

the right are what MARKETEEER answers when it receives the adjacent prompt from the service. Items in square brackets are variable names for which MARKETEEER substitutes actual data. Unenclosed items are literal data sent as seen. Please press F1 for further details and help on how to enter a protocol macro.

If the macro for the service you wish to use is not present, you must refer to the service's user manual to determine the protocol (communications procedure) entries required. Also, your electronic mail service may notify you from time to time of a change in its protocol. In such an event, you will have to use this option to change the appropriate macro accordingly. They sometimes change the protocol slightly to improve presentation and ease of use of the service.

If you are not familiar with the setting up of communications macros yourself, you are advised to seek expert help. Please consult your dealer or EBS. Set up the appropriate macro for each service to which you subscribe, then press the 'Esc' key until you return to the Telex & Data Comms Menu.

Service Subscriber Details

Now please select Option 6. A menu now appears comprising the list of communications services and a blank box for your subscriber details appears on the right in which to enter the telephone number of your Electronic Mail Service's local access node, your user ID (or Account Number), your User Name, your Password and your Mailbox Number. Please select the service you subscribe to and then type-in (according to the instructions shown beneath the box) whichever of these items are relevant to that service. These details are supplied to you when you become a subscriber to the service. Do this for each of the services you subscribe to, then return to the Telex & Data Comms Menu.

Modem Control Information

Now please select Option 7 to enter the modem control details. In the box which appears on the right, enter the following: On the first line enter 'PULSE' if you are on a public exchange or on a PABX using pulse dialling. Enter 'TONE' if you are on a PABX with tone dialling or on a public exchange that uses tone dialling. If you are on a PABX where you normally have to dial '9' to get an outside line, then enter a '9;' on the second line. The semi colon causes the modem to wait for an outside dial tone before dialling the rest of the number. If you are outside the U.K. and you are using MARKETEEER for telemarketing into the U.K. then you can add the international dialling code for the U.K. after the semi-colon.

On the third line, enter the number of rings the modem should allow to pass before answering an incoming call. This is usually 9. In the remaining 4 lines, enter 'V21'. This causes the modem to operate in 300 baud full duplex mode which is best for all functions with the modem currently supplied. Now return to the Telex & Data Comms Menu.

ELECTRONIC MAIL & TELEX OPTION

Now please select Option 1 'Electronic Mail & Telex'. We shall discuss the other options on the Telex & Data Comms Menu in a later chapter. The Electronic Mail & Telex Menu should now be on the screen. Please use the down-arrow and up-arrow keys to scan through this menu and read the explanatory text for each option as it is highlighted.

Option 6 concerning the setting up of the name & job title of signatory is exactly as described for ordinary sales letters in Chapter 8. In fact, both telex and letter signatories can be set up from either

the Letter Printing Menu or the Electronic Mail & Telex Menu. Please use Option 6 to set yourself up as the telex signatory. This is how your name will appear on the message header as the person who the message is 'From:....'. Remember that the company name and other details are taken from Prospect Record No 0001.

MESSAGES TO INDIVIDUALS

With the Electronic Mail & Telex Menu back on-screen, please select Option 1. The familiar name & address box now appears with instructions beneath giving you the facility for typing in the NAMECODE, POSTCODE or Ref of a prospect in order to retrieve his name & address details from MARKETEEER'S database. The prospect whose NAMECODE you should now enter is the one whom you wish to be the addressee or recipient of your first electronic letter (or Telex message).

Since you have not yet set up any of your own prospects on MARKETEEER, the only ones currently on file are the sample prospects which comprise our test data. We, EBS, are one of these 'sample' prospects. So please type in 'EBS'. MARKETEEER now searches its index for our details and then displays them in the name & address box. Beneath the box the five command words appear. However, instead of 'TYPE' or 'DIAL', the first command word this time is 'SEND'.

Before sending your electronic letter, please take a closer look at what is shown on the 'Telex' line in the name & address box. There, following the ordinary telex number and answer back code, and enclosed in braces (curly brackets), is the author's personal 'electronic mailbox' number: B19016965. Please nip back to the Electronic Mail & Telex Menu and select Option 4 and study the detailed explanation of electronic mailbox numbers. Then return to where you were.

SENDING YOUR ELECTRONIC LETTER

Please enter the command word 'SEND' or press F1. A message appears asking you to switch on the correspondence printer. Please do this and the message will disappear. MARKETEEER now checks the validity of the electronic mailbox or telex number. If it is invalid, a message appears on the screen telling you so. This attempt to transmit your message is then aborted, and you are returned to the command entry field.

Assuming the prospect's mailbox or telex number is valid, MARKETEEER attempts to establish a connection to the currently selected Electronic Mail Service's equipment via the public telephone network. To do this, it first dials up the Service's local access node from the telephone number given in your subscriber details for that Service.

Modems can send and receive data over the telephone line at a variety of speeds. The speed need not be the same in both directions. Three data transmission modes (speeds) are usually offered by the electronic mail services. These are known by their CCITT designations: V21, V22 & V23. A V21 modem sends and receives data at a speed of 300 bits per second. A V22 modem sends and receives data at 1200 bits per second. A V23 modem sends data at 75 bits per second and receives it at 1200 bits per second or vice versa. You have already set up the modem speed to V21 using Option 7 of the Telex & Data Comms menu.

Once it has finished dialling the telephone number of the appropriate Electronic Mail Service, the modem starts to send a 'calling tone' and continues to do so long enough for the public telephone network to connect the call and for the Electronic Mail Service's equipment to answer. On answering the call, the Electronic Mail Service's equipment 'hears' the calling tone and thereby recognises that it is being called by a modem. It responds by sending back an 'answer tone'. When

your modem 'hears' this answer tone, it knows that its call has been answered successfully by the Electronic Mail Service, stops sending the calling tone and advises MARKETEEER that a connection to the Electronic Mail Service has been established.

If the modem does not 'hear' an answer tone within a certain time limit, it assumes the call attempt has failed and advises MARKETEEER accordingly. This covers all situations where no answer tone is received, namely, when there is simply no answer, where the line is engaged, where the number is unobtainable or the line is dead.

According to the advice received back from the modem, MARKETEEER displays an appropriate message on the screen. This gives you the opportunity to check your equipment and see that all plugs and cables are plugged in correctly and secure, and then try the call again. To try the call again, all you do is press F1 'DIAL' again. Alternatively, you can abort the call altogether.

Assuming that the Electronic Mail Service answers the call, MARKETEEER logs on to the Service by sending your 'mailbox' number and 'password' according to the particular Service's communications procedure. It then transmits the text of your sales message, after which it signs off from the Service and breaks the connection. This whole process takes about one minute.

The format within which MARKETEEER embodies the text of your electronic letter is essentially that of a telex as illustrated in the Telex Directory. The destination electronic mail or telex number & answerback appear on the first line with your telex number & answerback immediately underneath. Your telephone number is also given on this second line. Then, following a blank line is a line containing the message reference (or serial) number plus the date & time of the message. Following a further blank line is the recipient's name and his company followed by another line containing your name and company followed by a third line stating the subject of the message which is in fact the library title of the letter. Then follows the text of the message below which appear the words 'End of message'.

Once transmission has been completed, you may scan to the next or previous prospect on file with a view to sending your electronic letter or telex to them. However, on this occasion, please press the 'Esc' key to return to the 'record retrieval' display, and press it again to bring you back to the Electronic Mail & Telex menu.

TRANSMISSIONS TO A TARGET GROUP

Now please select Option 2 'Send Telex to Target Group'. The name & address box and the status box appear on the screen together with the command words. In the name & address box is a message telling you that MARKETEEER is ready to send telex messages to the addressees on the current telex calling list. The target profile number, the target list serial number, and the size of the calling list are shown at the bottom of the status box on the right. All you have to do to initiate the transmission of a copy of your text as an electronic letter or telex to each prospect on the current telex calling list is to press F1 (or enter the command 'SEND').

MARKETEEER then proceeds automatically to transmit the message to each addressee on the list. You can follow the sequence of events involved in transmitting the message to each addressee by observing the entries in the status box on the right of the screen. In transmitting all these telexes or electronic mail messages, MARKETEEER calls the Electronic Mail Service only once and sends all the telexes as a single call. It then disconnects automatically when the last message has been sent. The Electronic Mail Service then forwards each message to its addressee's electronic mail box or telex terminal as appropriate.

POST-TRANSMISSION REPORT

After a teleshot transmission, you should return to the Electronic Mail & Telex menu and select Option 3 'Print Telexshot Report'. Then follow the on-screen instructions for printing the report. The report is headed by the text of the telex or electronic mail message which is followed by a list of all the addressees to whom the message was sent. It also gives the time & date of transmission for each message.

AUTOMATIC EVENT RECORDING

Every time an electronic mail or Telex message is transmitted, the fact is recorded in the addressee's data record within MARKETEEER'S database together with the date of transmission. Differentiation is made between an individual one-off message or telex and a message or telex which is part of a target or general 'electronic' mailshot.

COMMUNICATIONS TERMINAL

Please now return to the Telex & Data Comms menu and select Option 2. A communications terminal screen now appears comprising a main text display window in the centre above which are modem and call status indications and below which are the terminal's operating instructions plus some other status indicators. Please press the F3 key. A fuller explanation of the operator instructions now appears in the main display window. Please read these carefully. The following paragraphs add to and clarify these explanations.

F1:Disconnect & Exit

If you press the F1 key while in MARKETEEER's communications terminal, the following takes place. If a data call is currently connected (or is in the process of being connected or disconnected), the call is safely terminated and the telephone line is released. Then you are returned to the Telex & Data Comms menu automatically. If no call was connected (or in the process of being connected or disconnected), you are simply returned to the Telex & Data Comms menu immediately.

F2:Clear the Display Window

If you press F2, then whatever text was currently displayed within the terminal's display window is cleared and the cursor returns to the top left of the window. This is useful when, having completed a logging on procedure, you wish to send a message. It means that you can start with a 'clean sheet' for the outgoing message to be displayed. The transmission or reception of the Form Feed character (ASCII 12) has the same effect.

F3:Display Help Text

You have already seen that this key causes the explanatory text for these operator instructions to be displayed in the text window. F3 is ignored if text is currently being sent or received via the telephone line. If the help text is currently on screen, pressing F3 causes the original contents of the terminal window to be displayed. If a call is connected and the help text is currently on screen, the receipt of a character from the remote end will also cause the help text to be replaced by the original contents of the terminal window with the addition of the received character. This is to prevent any communication being missed while you are looking at the help text.

F4:Send TX-FILE

The TX-FILE referred to here is the Output File produced by the Letter Creation subsystem. It contains the letter which is automatically used as the letter text to be printed for a mailshot or to be sent in a telexshot. This simply offers another way of sending that letter as a telex or electronic mail message.

Transmission of the contents of the Output File can be invoked at any time while using the communications terminal.

F5:Enable/Disable Printer

Pressing F5 at any time while using the communications terminal causes all subsequent input and output via the telephone line, or local input and output to and from the control software of the modem, to be printed on the correspondence printer as well as being displayed in the terminal display window. When connected to a distant device via the telephone network, provided the Remote Echo lamp below the terminal display window on the right is lit, the characters actually printed by the printer (and those displayed on the screen) have in fact come from the remote end. In other words, characters originating from this end have been sent to the other end, echoed back and the echoed characters then printed (and displayed) here. This guarantees that whatever you see printed (or displayed) has actually been received by the remote equipment.

F6:Capture Incoming Text In File

In stead of, or as well as printing what is received from the telephone line, you can also capture it in a text file on disk. You can invoke the capture of incoming text in a text file any time you are using the communications terminal by pressing F6. You can later stop the process and close the file by pressing F6 a second time. Each time you press F6 to start capturing text and then press it again to stop the capturing process, a new and separate text file is created. Each completed text file is then placed in the Received Messages Library.

Up to 40 such text files containing received messages can exist in the Received Messages Library concurrently. How these received messages can be displayed and printed will be described later. An indication at the bottom right of the screen shows how many spare RX (receive) files are currently available.

F7:Remote Echo

To send text manually, you simply type it on the keyboard. What you type is displayed in the terminal display window on the screen. If you enable the printer using F5, it is also printed by the correspondence printer. If you enable text capture by pressing F6, it is also written to an RX file in the Received Messages Library.

If you are connected to an electronic mail service or some other remote equipment via the public telephone network, then what you type is also transmitted to the remote end. If no call is currently connected, what you type simply goes to the modem controller.

When you are connected to a remote service via the telephone line, every characters you send down the line is received by the remote equipment which normally re-transmits it back to you. In other words it 'echoes' the character. This is known as full duplex operation. Receiving the character back from the other end after you have sent it ensures that you know that it was received by the other end

correctly and was not lost or garbled on the way. The echoed character is then displayed in the terminal display window. What you see is therefore what the other end has confirmed that it has received. Some remote equipment, however, does not provide an echo.

If you are connected to such equipment, you need to press F7 to cause MARKETEEER to display directly on the screen what it is actually sending out. Otherwise you will not see what you have sent. You can press F7 a second time to disable this direct local character echo.

When you are not connected to a remote service, what you type goes to the modem controller as a request to dial a call or tell you its status etc.. Although the modem controller does not echo characters, you do not need to press F7 to see what you are typing because MARKETEEER automatically provides a local character echo when a call is not connected.

F8:Enable/Disable LF after CR

Some remote equipment requires a separate Line Feed character to be sent to advance it to a new line after you have sent a Carriage Return character. In this case, you need to press F8 to cause MARKETEEER's terminal subsystem to transmit a Line Feed character after each carriage return it sends.

Please now press F3 to return from the help text display, then press F1 to return to the Telex & Data Comms menu.

AUTO-LOGON

Please look at the Auto Logon 'menu' on the right of the screen. It shows a list of the Communications Services, the details of which you entered using Options 4, 5, and 6 earlier in this chapter. You can ask MARKETEEER to dial up and log on to any of the listed services to which you subscribe simply by typing in the corresponding letter.

MARKETEEER then displays the 'terminal screen', automatically dials the selected service and performs the logging on part of the service's protocol. You may then proceed from the keyboard with requests for whatever functions the particular service provides using the command syntax given in the service's user manual.

The automatic logging on procedure can fail. For example, the service's lines may all be busy or the telephone network may misroute the call. If the auto-logon process fails, an auto-logon failure message is displayed above the terminal display window. You may then press F9 to invoke a re-try or F1 to exit the terminal subsystem. If the auto-logon process succeeds, a message is displayed above the terminal display window telling you that you are now logged on to the named service.

RECEIVED MESSAGES LIBRARY

Please return to the Telex & Data Comms menu and select Option 3. A window is displayed on the screen similar to the terminal display window. You should now see a sample message in the display window. A bright message on the right below the window should tell you that the message has not yet been printed; ie no hard copy exists for it at the moment. Since the whole of the message will not fit in the display window, you can use the PgUp and PgDn keys to scroll the text within the window. You can print the message by pressing F3 and then following the instructions which appear at the bottom right of the screen. After printing the message, you can if you wish erase it from the library by pressing F4. To avoid the possibility of losing a vital message, MARKETEEER will not let you erase it until it has been printed.

The NEXT and PREV commands move you to the next and previous messages in the library respectively. Up to 40 messages can be held in the library concurrently. As you use the library, you will probably fill it up and then erase selected messages. This will result in unoccupied entries in the library. On entry into the library subsystem from the Telex & Data Comms menu, the first existing message is displayed (which will not be Message No 1 if Message No 1 has been erased). The NEXT command then takes you to the next EXISTING message and so on through the library, skipping over all erased message entries.

This completes your introduction to MARKETEEER's terminal and received messages library subsystems. Please press the 'Esc' key until you return to the main menu and then switch off your printer.

Eastern Business Systems "Marketeer": User Manual

Chapter 11: New Names & Addresses**INTRODUCTION**

So far, we have looked at MARKETEEER only from the point of view of its ability to help you organise, classify and monitor your overall market, and communicate effectively with pre-determinable target groups of prospects within that market. The emphasis has been on the form and shape of the market rather than on the individual prospects within it.

But all markets are ultimately made up of individual prospects. And no classification, selection or monitoring system can possibly work unless it is fed constantly with all the relevant up-to-date facts about each prospect within the market concerned. It is MARKETEEER'S facility for entering, recording and maintaining these facts about each individual prospect that we are now ready to consider.

THE NAME & ADDRESS RECORD

The place where MARKETEEER stores all the relevant facts pertaining to one individual prospect is called a Prospect Record. Each Prospect Record contains not only the company name, address, telephone number, name & job title of the person to contact and so on for the prospect concerned, but also the values of the various 'keys' which effectively determine his individual CLASSIFICATION.

We shall explain the various details which make up a Prospect Record by going through the motions of entering a further fictitious prospect to the ones already on file within our test data. From the main menu, select Option 1 'Prospect Records'.

For speed of operation, the records on the database which hold your prospect details are all the same size (ie they can each contain the same maximum number of characters). However, the lengths of the names and addresses of different prospects vary. This in itself is no problem. The problem comes in the fact that in different addresses of approximately the same total length, the corresponding individual lines may vary widely in length as illustrated by the following two names & addresses.

MR JIM BROWN
69 UPPER BRIDGE STREET

MISS FIONA BRYCE-JONES
GRANGE MANOR

Both total 34 characters in length (including letters, numbers and spaces). However, these 34 characters are not distributed in the same way between the two lines in both cases. In order for there to be enough room on the basis of a fixed maximum line length, both lines would have to be able to accommodate 22 characters each. This would waste storage space on the disk in the case of the short line in each name & address.

The Post Office standard for the maximum length of a name & address line is 27 characters. MARKETEEER uses this standard. Therefore, on a fixed line basis, each 10-line name & address record would require a storage space of 270 characters on the disk. However, although it is likely that a name and address will contain a line 27 characters long, it is unlikely that all its lines will be 27 characters long. To provide 270 characters of storage per record would therefore be wasteful.

Although the lengths of individual lines may vary from one name & address to another, it is considered that 156 characters is an adequate maximum into which most names and addresses will fit. This count of 156 includes all the characters in all the lines except for the NAMECODE, POSTCODE and XREF lines which are separate special 8-character fields. A great saving in disk storage space is thus made, allowing more records to be stored on the disk than would otherwise be possible. Another advantage of this overall restriction to 156 characters for a complete name & address will become apparent when we discuss the printout of record listings in Chapter 14.

ENTERING A NAME & ADDRESS

You are now ready to type in the name & address of a prospect. The name and address which follows has been specially designed to demonstrate the various facilities provided by MARKETEEER to help you to type-in names & addresses more easily.

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SMITH AND JONES PRODUCTS LTD  
PROGRESS WORKS  
BRIDGE STREET  
GORRINGHAM  
LARKSHIRE LK5 6QW  
TEL:0999-65000
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Contact: MR JIM BROWN MANAGER

First of all, please type-in the letter 'S' of 'SMITH'. The 'S' appears at the top left of the name & address box and the cursor moves one space to the right ready for the next letter.

Now please finish typing in the rest of the company name. Notice that the COUNT above the name & address box increases by one every time you type a character. You will find that you cannot type-in the 'D' of 'LTD' at the very end of the line. This is because the last character position in the line is reserved as a place for the cursor to rest when you have typed in the full 27 characters. The last character position on the line is in fact the 28th. Since MARKETEEER limits name & address lines to 27 characters, you will have to abbreviate the company name.

Over-typing & Deleting

How about replacing the 'AND' with an '&'? This saves two characters. Press the 'left-arrow' key on the far right of the keyboard. The cursor moves one space left back over what you have typed. Keep pressing it until the cursor is over the 'A' of 'AND'. Now type-in an '&' remembering to hold down the shift key since '&' is an upper case character. An '&' now appears in place of the 'A' and the cursor moves one space to the right. You are now left with an 'ND' you don't want, and the cursor is under the 'N'. Press the 'Del' key. The 'N' now disappears and all the text to the right of the cursor shunts one place left thus now placing the 'D' under the cursor.

Press the 'Del' key again to get rid of the 'D'. The 'D' disappears and the text again shunts one space left. The line should now read 'SMITH & JONES PRODUCTS LT'. Now press the 'right-arrow' key repeatedly until the cursor is sitting over the space immediately to the right of 'T' at the end of the

line. Then type the letter 'D'. It is accepted this time because it is now in the 26th character position which is within the allowed 27 characters. The company name should now be complete and correct.

In the above exercise, you have made use both of the 'over-typing' function and of the 'delete' function. You over-typed the 'A' with '&' and you deleted the 'ND'. You may over-type or delete anywhere within the name & address box. You could have used the backspace key instead to delete. This acts in a different way. You would have placed the cursor under the 'D' in 'AND' and pressed the backspace key twice. This would have dragged the text on the right two spaces to the left over the 'AN'. Then you would have simply typed an '&' over the 'D'. Perhaps you would like to try this another time. Now please press the carriage return (or 'Enter') key.

NOTE: the terms 'Enter' and 'carriage return' refer to the same key on the keyboard. This is because this key is used for two purposes: in some circumstances, it simply causes text just typed-in or entered to be processed by the software; in other circumstances, it is considered as performing the equivalent of a typewriter's Carriage Return key. The latter is generally more appropriate in the context of typing in names & addresses.

The 'NAMECODE'

The cursor now drops to the beginning of the second line which is called the NAMECODE. The NAMECODE is a short name up to 8 characters long. You should make up a suitable NAMECODE for each person or company you put on file. It must be a name you can remember easily since it is your main means of recalling the record later when you wish to look at it or amend it.

MARKETEER prints listings of prospects in alphabetical order of NAMECODE. A NAMECODE must therefore have a clearly definable alphabetic position which a long or double-barrelled company name may not have. For example, SHIRLEY JONES LTD could be a company owned by a woman called Shirley Jones or it could be a company formed by two men called Tom Shirley and Peter Jones. Where you expect the name to appear in the alphabetic list depends on which of these two possibilities is the case.

In the first case, you could make the NAMECODE 'JONESSHI' (which is 'JONESSHIRLEY' chopped down to 8 characters). In the second case, you could make the NAMECODE 'SHIRLYJO' (which is 'SHIRLEYJONES' chopped down to 8 characters). In the first case, the company would be listed under 'J', and in the second case it would be listed under 'S'.

Alternatively, you may remember a particular prospect by his nick name. For example, in the case of our sample name and address, the manager is Mr. Jim Brown. You may know him very well as a friend. Thus, when you think of him as a prospect and want to recall his formal details on MARKETEER, you naturally think of him as Jimbo! You may not even remember the name of his company. In this case you could enter his NAMECODE as 'JIMBO' and always look for him on listings under 'J'.

For the sake of argument, let us adopt the NAMECODE 'SMITHJON' for our sample prospect. So please type it in. Please note that only letters and numbers are allowed in a NAMECODE. An '&' for example is not allowed. The reason is to do with the order in which the computer sorts non-alphanumeric characters. When you are typing in a NAMECODE, you do not need to count the 8 characters because MARKETEER will reject a 9th character or beyond. Now press the carriage return key.

The cursor is now at the beginning of the line titled ADDRESS. This first address line is primarily for the name of the premises, but can be used as an extension for a particularly long company name,

or simply left blank. So now please type in the rest of the name & address details as given above. If you make any typing errors along the way, please use the over-type & delete facilities to correct them. When you have finished the last line, please press the 'F2' key to SAVE the new record.

Notice that when you press the 'F2' key to store the new record, the 'SORTING' lamp lights first and stays on for a short time. During this time, MARKETEEER is placing the namecode and postcode of the new prospect each in its correct position within the namecode and postcode indexes. The 'STORING' lamp then lights while the main record and the key records are being stored.

Ref Number

Once the record has been stored, a set of command words appears in place of the editing instructions beneath the name & address box and a Ref number is shown above the box followed by the word 'of' and another number.

MARKETEER'S main file comprises a large number of fixed-length storage spaces called records. As you put more and more prospects on-file, more and more of these records become occupied. The records are used starting with Record No 1 and working upwards. The Ref number shown above the name & address box is in fact this record number.

The number shown after the 'of' following the Ref number is the total number of prospects currently on file. This in effect is the number of entries currently on each index. In many cases this is exactly the same figure as the Ref number of the last occupied record on file - but not necessarily!

Suppose you start a new Database and put 100 names & addresses on file. The highest occupied record is then 100. The current extent of the index is also 100.

But suppose now you delete the prospects whose details are in records 7, 23, 42 and 96 (4 records in all). The current extent of the index will then be 96 because the appropriate entries are removed from each index and each index is then 'collapsed' down to form a neat contiguous run of 96 entries. If at this stage you were to recall the record whose Ref is 100, you would get a display above the box of 'Ref 100 of 96'. This is saying that although the actual name & address data is stored in 'position' 100 in the disk file, there are only 96 actual valid records currently on file.

Thus the highest occupied record is still 100. This is because the large main records are not as easy to move around as the little index entries. Therefore, MARKETEEER does not bother to move them at all. The fact that deleted records are no longer represented by entries in the indexes means that MARKETEEER regards them as spare - the discarded information within them being no longer accessible.

The next time you enter a batch of new prospects, the first 4 of them will be put in Records 7, 23, 42 and 96 respectively instead of Records 101, 102, 103 and 104. Thus if you put 8 new prospects on file, the index will expand by 8 (from 96 to 104), while the main file will be extended by only 4 (from 100 to 104).

Apart from the great saving in processing time made possible by having the filing system work in this way, there is also another very important reason for it. Once a prospect has been put on file, his name & address details remain in a specific place on the disk. This 'place' is a record, and each record has a number. This number is synonymous with the 'Ref' number shown in the name and address box. A prospect's 'Ref' number thus remains the same the whole time he is on-file.

A prospect's 'Ref' (or 'reference') number can thus serve as an alternative to his 'NAMECODE' as a unique means of identifying him for the purpose of recalling his details from MARKETEEER'S

database. Furthermore, whenever a prospect is deleted, his 'Ref' number is automatically re-assigned to the next new prospect entered. MARKETEEER'S 'Ref' numbers will not therefore go on increasing for ever, but will extend only as far as the maximum number of prospects you have ever had concurrently on file so far to date.

Validation of the Postcode

Please notice the postcode. You most probably entered the postcode as 'LK5 6QW'. You could have entered it 'LK56QW' if you had wished, missing out the space. This is because MARKETEEER checks the validity of the postcode you enter and then parses it into the standard 8-character format: 'AA9X 9AA', where 'A' represents a letter, '9' represents a number, and 'X' represents a letter or number. A space is put in at the 5th character position if one is not already there.

So as you can see on the screen, the postcode you entered has been checked and parsed as 'LK05 6QW'. The '5' has been made into '05' to pad out the postcode to the standard 8-character format. The reason for this is that it enables MARKETEEER to sort and select prospects faster into their appropriate sales areas and visiting routes. This will be discussed later.

If you type-in an invalid postcode, a message telling you so appears on the POSTCODE line with the cursor positioned over the first offending character. Thus you are able to correct it there and then. The cursor then locates over the next offending character if there is one, and so on. Assuming the entered postcode was valid, the record should have been stored and the editing instructions below the box replaced by the command words as mentioned previously.

Amending a Name & Address

For the purpose of illustrating another facility let us suppose that a colleague informs you that 'PROGRESS WORKS' is in 'UPPER BRIDGE STREET' and not just plain 'BRIDGE STREET'. Please therefore type-in 'EDIT' or press the appropriate function key. The command words below the name & address box then disappear and the original editing instructions re-appear below the box with the cursor set in the top left corner of the box. Move the cursor to the beginning of the line containing 'BRIDGE STREET'. The cursor can be positioned anywhere within the text in the name & address box using the four cursor control keys (up, down, left and right arrow keys) on the right of the keyboard.

Inserting New Text

Now press the 'Ins' (insert) key. The word 'INSERT' is now displayed above the box showing that the program is in 'insert mode'. Now simply type-in the word 'UPPER'. Do not forget to type a space at the end of 'UPPER' to separate it from 'BRIDGE'. Notice that each time you type a character, all the text to the right of the cursor shunts one space further to the right to make room for the new character. In the process, the cursor itself also moves one space to the right. Now press the 'F1' key to store the updated version of the name & address.

Notice that the word 'INSERT' disappears, showing that the 'insert mode' has been cancelled. The 'insert mode' is automatically cancelled whenever you press the 'Ins' key again, the carriage return key, the 'F2' key, the 'Del' key or move the cursor using any of the four arrow keys. Although the insertion you have just done was at the beginning of a line, you may insert or delete anywhere within any line. If you insert so much extra text that the existing text to the right hits against the end of the line, then all further characters will be rejected. You will not lose any text off the end of the line, neither will any text spill over onto the next line.

Ad Hoc Comments

Within a database containing hundreds of new prospects, it is not easy to put a face to each name and address. Yet to be effective in selling, it is vital that you maintain a reasonable mental image of each person with whom you deal. For this, you need something in each record which triggers your memory about some unusual feature of your prospect or the events and situations you have shared with him.

He may have a nickname. He may remind you of someone you've seen on TV. He may have an unusual physical characteristic. You may have met him in a funny situation. One word or a short phrase embedded within his name & address details could bring back a full mental picture of the person concerned days, weeks or months later.

However, the words and phrases which make the best memory triggers may not always be complementary. Therefore, you do not want them to be printed out as part of your prospect's name & address on a sales letter or mailing label. MARKETEEER allows *ad hoc* comments to be typed within the name & address box without their being regarded as part of the name and address. MARKETEEER has been programmed to recognise an *ad hoc* comment as being any piece of text preceded by an asterisk. So perhaps in order to help you recapture the flavour of the events and circumstances surrounding Mr Jim Brown, our sample prospect, you could insert the following *ad hoc* comment into his name and address record:

	Smith & Jones Products Ltd SMITHJON Progress Works Bridge Street Gorringham Larkshire LK5 6QW
CONTACT	0999-65000 84774 SMITH G Mr Jim Brown(BSc) (Jimbo) /BManager *BIG NOSE

This tells you that his nickname is Jimbo and that he has a big nose. Thus, when you recall his record in several months time, having in the meantime dealt with hundreds of other prospects, these comments will bring the full story back to mind just before you telephone him again to see if he is any nearer placing an order. This comment will NOT appear in the name and address part of a sales letter or mailing label.

There are two further points about the CONTACT line. Jim Brown's BSc qualification must be enclosed in {} so the software does not take it to be his surname. Also, the bracketed nickname on the 'name of contact' line is not treated as an *ad hoc* comment, but as the 'Christian name' of your contact to be used in the sales letter. Mr Jim Brown would in this case be addressed as 'Dear Jimbo'. This has been fully explained previously in Chapter 7. Notice the /B before Jim's job title? It's a salutation override. It replaces the default salutation ("Yours sincerely" in this case) with "Best regards". Other salutation overrides are: /A = "All the best", /C = "Be seeing you", /F = "Yours faithfully", /L = "Love from", /N = "Bye for now", /O = "See you soon", /R = "Regards", /S = "Yours sincerely", /T = "Tatty bye", /W = "Best wishes" /Y = "Yours ever". Now press the 'F1' key to store the amended record.

Count Overflow

As pointed out earlier, the maximum total amount of text which can be accommodated within a name & address record is 156 characters. The COUNT at the top right of the screen keeps you informed on the number of characters you have used so far.

If, however, you carry on typing without keeping a close watch on the count, and eventually try to go beyond 156 characters, all the excess characters will be rejected and the count figure will turn bright red. Your only option then is to look through what you have typed and find some way of abbreviating it so that you will have room to enter the rest of the details.

To do this, you must move the cursor to places within the name & address where you can cut out or abbreviate words, and then use the 'delete' facility to remove the appropriate characters.

As you remove each character, the COUNT will decrease by one. Once you have reduced the COUNT sufficiently, you can slew the cursor back down to the end again and finish your entry.

CLASSIFICATION

The box on the right of the screen is for entering special information about the prospect which is later used by MARKETEER to decide whether or not he is to be included within a special target list whenever you wish to hit a particular sector of your market. This information is discussed in detail in the next chapter. However, you should take a look at this now by reading the on-board HELP notes and selecting some of the key numbers, then 'Esc' back to the command word entry position.

Ready For The Next Entry

Having recorded this prospect, you would normally want to enter another one. To do this you enter either the NEW command for another new record, or the RLKV command if you wish to enter a new record but with the same CLASSIFICATION key values which you set up in the record you have just entered. In the normal course of events, you would now go through exactly the same procedure for entering your next prospect. Then you would repeat the same cycle until you had entered all your latest batch of new prospects. However, for this exercise, one new entry is enough.

This completes your 'hands-on' introduction to entering new prospects into MARKETEEER. However, before you come to do this for your real prospects, there are quite a few further things you should know. In the meantime, please 'Esc' back to the main menu.

PAPERWORK STILL ESSENTIAL

Whether your sales/marketing operation is computerised or not, there are certain types of information which still need to be kept on paper - such things as correspondence, tenders, quotations, and contracts. After all, you cannot yet write your signature in magnetic 'lines of force' on a computer disk!

There is another class of information which, while it could be stored on the computer, is still better left on paper. This includes items such as long 'dossier-type' notes which, while being specific to the individual prospect, have no bearing on his essential identity or placing within the market. In other words, such information is of no value to MARKETEEER in its task of determining whether or not a given prospect fits into a given target profile.

Apart from the cost of the far greater amount of storage media required to contain this information if it were kept on the computer, there would be also the extra human time required to type it all in - all to no extra benefit.

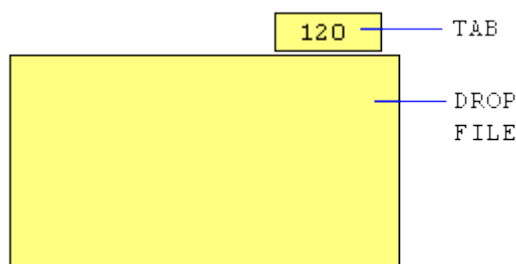
It therefore makes a lot of sense to maintain a conventional filing cabinet for use in conjunction with MARKETEEER. However, in this harmonious marriage, it is MARKETEEER that will do all the originating, organizing, categorizing, classifying, sorting, identifying, extracting and purging while the filing cabinet simply acts as a large bulk storage bin for your more in-depth prospect information.

A Dedicated Filing Cabinet

It is now time to acquire and equip filing cabinets specially for use with MARKETEEER. The choice of cabinet is up to you. You can use a conventional 4-drawer filing cabinet, or you may prefer a Twinlock Multistor type where the files are accessed from the side instead of from the top. You will need enough storage to hold a file for each of your prospects.

Numbered Drop Files

Let us suppose you have conventional 4-drawer filing cabinets. Please equip each filing cabinet with 400 drop files - 100 per drawer. Snap a plastic tab holder onto each drop file. Number the drop files from 1 to 400 by sliding numbered card inserts into the tab holders as shown in the following example:



Please number the card inserts clearly with large stick-on or Letraset-type figures before inserting them into the plastic tab holders. Then please make sure that the files are arranged in numeric order from 1 to 400 within the filing cabinet, starting with File No 1 at the front of the top drawer, and finishing with File No 400 at the back of the bottom drawer.

Wallet Folders

MARKETEER'S database is intended to be one of 'active' or 'current' prospects. It is not intended as an archive for every prospect you have ever had or are ever going to have. Therefore, it is essential that you cull out the 'dead wood' of 'old no-goes' and 'non-starters' at regular intervals, thus keeping your database 'clean'. Delete the records of such prospects from the database, and at the same time remove their paperwork from their corresponding wallet files.

If you need to archive dead paperwork, please archive it somewhere other than in MARKETEER'S filing cabinet!

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Chapter 12: Updating Names & Addresses**INTRODUCTION**

In the last chapter we discovered how to create a new name & address record; ie how to put the name & address details of a new person onto MARKETEEER'S database. In this case, we entered the complete name & address, postcode, telephone & telex numbers, plus the name & title of contact. However, in many cases, when you first get wind of a new contact, you will not have all the information you need.

You may only have someone's name and a phone number. You may only have a company name and part of their address. But the important thing is that you know that what little information you have does represent a potential source of business. Therefore, you want a record established for this person on MARKETEEER'S database, knowing that you can fill in the missing details later when you have had time to do the necessary research.

Furthermore, even when you have all the details, they can change! A person may relocate to another part of the country. Their address will therefore change. The person you have on file as your contact there may leave the company, or may not be the most appropriate person to contact anyway. The name & title of contact may therefore change. Or you may have got their phone number wrong. You need to be able to correct it.

This all goes to show that having established a new name & address record on MARKETEEER'S database, there then has to be a means whereby you are able later to recall it from the database, amend or update it, and then put it back. This is what MARKETEEER'S amendment facility provides.

From the main menu, please select Option 1 again. The familiar Record Retrieval display appears on the screen with the cursor located at the first of the 8-character NAMECODE field.

RECALLING A RECORD

The name & address details for any person currently held within MARKETEEER'S database may be retrieved and displayed on the screen simply by typing in either his NAMECODE, POSTCODE or Ref number. We shall now discuss the full ramifications of these three means of recalling prospect records.

By NAMECODE

When you first enter the name & address section, the cursor rests at the beginning of the NAMECODE field (or line) in a blank name & address box. To retrieve a name & address record by namecode, type in the namecode and press the key marked F4. If MARKETEEER cannot find a namecode within its index which matches exactly the one you have just typed in, it retrieves the record whose namecode most closely matches the one you have entered.

While entering a namecode, you may use the left-pointing and right-pointing arrow keys to move the cursor back and forth over the characters you have already typed in order to correct typing errors. As shown by the marked out field, a namecode may be anything up to 8 characters long.

By POSTCODE

You may forget the name of a contact and his company, but you remember where abouts they are. In such a case, you can find their postcode area by looking at the Postcode Key Map. Then you use the down-arrow key to move the cursor to the POSTCODE line in the name & address box and type-in as much of their postcode as you are able. MARKETEEER will then retrieve the first record whose postcode fits most closely to what you typed in.

```
POSTCODE is: AA9X 9AA
                |  |  |
Area  _____|  |  |
District _____|  |  |
Space  _____|  |  |
Sector  _____|  |  |
Street  _____|  |  |
```

By Ref N°

When using a prospect's reference number to retrieve his name & address details, first use the up-arrow key to move the cursor to the Ref field (line) just above the top of the name & address box. Then type in the up to 5-digit Ref N° of the person whose name & address you want to retrieve and then press the F4 key.

The kind of situation where you would want to access a record by its reference number is when you are browsing through a prospect's wallet file which you have just got out of the filing cabinet, and then want to recall his record from the computer file. The reference number is printed on the wallet and on the drop file tab within the filing cabinet.

If you type in a Ref number greater than that of the current highest occupied record, MARKETEEER displays a message stating the currently acceptable range of Ref numbers then allows you to try again.

A MARKETEEER database of 10,000 prospects occupies about 12.5 megabytes. However, if you wish to hold your prospect data in a larger number of smaller independent databases, then you must impose an appropriate upper limit on the size of each database according to the capacity of your hard disk.

The above three methods of recalling existing names and addresses are very fast: about 1 second to recall any one of 30,000 names and addresses by Ref N° and about 1½ seconds by NAMECODE or POSTCODE.

However, if you have forgotten the NAMECODE, POSTCODE (or general geographic area) and the Ref N° of the person you are trying to find, there are two further options open to you. But these take a lot longer to find the person's record.

SCANNING

You can enter any sequence of up to 29 characters (such as a name) on the name & address line within which you think it will appear. Then press the F4 key. That line only will be scanned to see if it contains what you have entered. This will be done for each name & address currently on the database until a match is found.

TRAWLING

If you think that the character-string (name) you have entered occurs within the name and address record you want, but you are not sure where (ie on which line), then press the F5 key instead of F4. This extends the breadth of the search so that the whole of each name and address record is trawled for an occurrence of the character-string you have entered. This method takes the longest covering only 1000 names & address records per minute on a 286-based PC.

Our Sample Record

Now please recall the record for 'Smith & Jones Products Ltd' by typing in the namecode 'SMITHJON' and press the F4 key. The SEEKING lamp lights showing that MARKETEEER is searching its index for SMITH & JONES's record after which the LOADING lamp lights instead showing that the details have been found and are being loaded ready for display.

It is often difficult, and is usually unnecessary, to remember the whole of a namecode. For example, in this case, if you were to type-in only 'SMITH' and then press the carriage return key, MARKETEEER would recall the first record on file in alphabetic order whose namecode began with 'SMITH'. You could then scan forwards through the 'Smiths' using the 'NEXT' command until you found the one you wanted. In most cases, the first four letters of the namecode are sufficient to ensure that you get the correct record first time.

During your study of Chapter 5, you defined each of your sales areas in terms of a set of postcodes. MARKETEEER finds the sales area within which a given prospect is located by searching through each of these sets in turn until it finds the postcode shown in this prospect's address. It then finds the name of the sales area which it displays in the CLASSIFICATION & STATUS box.

Generally, the more sets of postcodes MARKETEEER has to search through, the longer the search takes. That is why we suggested in Chapter 5 that you set up your sales areas starting with your 'home' (or most populous) ones and working outwards. This ensures that for most prospects, the search is quick, while it is relatively slow for only those few who inhabit the outer margins of your market territory.

We have made Smith & Jones Products Ltd fictitious right down to their postcode. MARKETEEER cannot therefore find their postcode in any of its sales area lists. Thus, after spending a relatively long time searching through the whole lot, it ends up by having to display 'Area unknown' indicating that it cannot place them. This happens even with real prospects when you do not put in their postcodes. So please always put in a prospect's postcode.

COMMAND WORDS

Finally, the prospect's name & address and CLASSIFICATION details appear in the boxes, below which appear eight command words: NEXT, PREV, XREF, QUIT, HELP, EDIT, NOTE, KILL.

'EDIT'

Suppose that after telephoning Smith & Jones Products Ltd you find out that Mr Jim Brown is not your best contact after all. You should really be talking to Mr Basil Davis, the Buyer. So please now type-in the command word 'EDIT' or press F6. The editing instructions now replace the command words beneath the name & address box and the procedure for amending the recalled name & address is exactly the same as that for amending a new name & address as has been described already in Chapter 11.

If you amend this entry, please type-in a bit of gibberish and make a few typing errors so that by the time you are down as far as the 'POSTCODE', the whole entry looks a bit of a mess! Now press the 'Esc' key to cancel your attempted editing session. The record is re-loaded from the disk and the mess is replaced with the original name & address details. Now press F6 again and this time replace 'Mr Jim Brown' the 'Manager' with 'Mr Basil Davis' the 'Buyer'. Remember to delete the ad hoc comment about his big nose. Perhaps you address Mr Davis on a first name basis as 'Baz', so enter '(Baz)' after his name. Then press the 'F1' key to store the updated details to disk. When the updated record has been stored, the command words re-appear beneath the name & address box.

'KILL'

In the not too distant future, you will doubtless accumulate prospects on the database whom you know full well are non-starters. To remove a non-starter from the database, simply recall his record in the usual way, then type 'KILL'. The record concerned is then deleted from the database and the next record in current index order is displayed in its place.

Whenever you delete a prospect from the database, remember to remove his paperwork from his folder in the filing cabinet. Then, when MARKETEEER allocates his reference number to a new prospect, the corresponding folder will be empty and ready to accommodate the paperwork relating to the new prospect.

But please, please be extremely careful when using the 'KILL' command. Don't delete a prize prospect by mistake!

'NEXT' & 'PREV'

Typing in the command word 'NEXT' or 'PREV' causes MARKETEEER to search out, recall and display the next or previous record on file.

If you recalled your first record using its namecode, then the next or previous record will be the next or previous record in alphabetical order, namely the record whose entry is the next or previous one along in the Namecode Index.

If you recalled the first record using a postcode, then the NEXT and PREV commands will recall the next and previous prospects in alphabetic order of postcode. For the most part, this means that the next or previous prospects will be geographically adjacent.

If you use a reference number to recall your first record, then the next or previous record will be the record whose reference number is one more or one less than the reference number of your current record, ie the next one along or back in the filing cabinet.

Suppose you have just deleted a prospect whom you recalled by namecode and after the deletion has taken place you have been automatically advanced to the next record in the index.

Then, having viewed this next record, you hit 'PREV'. The details which now appear are those of the prospect who was before the one you deleted. In other words, the 'PREV' command moved you straight over the now-deleted prospect. He is no longer there. He no longer has an entry in the Namecode Index.

'XREF'

As you amass more and more prospect details on MARKETEEER, you will discover various relationships which exist between your prospects. For example, you may discover that the director or employee of one company is also a director of another company, or that one company is a franchisee of another - or that two companies are members of the same 'holdings' group - or that a contact is a member of a certain golf club, and so on.

The XREF facility allows you to link a number of prospect records together to form a circular cross-reference chain. You can thus construct a picture of your market in terms of the groups or cliques which exist among your individual prospects. This can be of enormous value when trying to penetrate 'closed' groups within which each recommends to the other and goes for group suppliers.

To link two prospect records together, proceed as follows. Retrieve one of the prospects. When his details and the command words appear, type EDIT. Then move the cursor to the start of the XREF field in the name & address box and type-in the namecode of the other prospect to whom you wish this prospect to be cross-referenced. Then press the 'End' key to restore the record to disk. Then recall the other prospect's record and put the namecode of the first prospect in his XREF field. The two prospects are now linked together by their mutual cross references.

From now on, whenever you display the details of either of these prospects, you will be able to see that he is related to the other prospect as shown in the XREF field. To display the related record, you simply type XREF (or simply press the F3 key). When the other prospect's details appear, you will see that he is cross-referenced back to the first prospect. You can get back to the first prospect by pressing F3 again.

The simple cross-reference chain described here contains only two prospect records. However, you can gradually build up chains containing as many 'links' as you wish. Always make sure that you link the last record in a chain back to the first to form a closed circle so that when you need to find to whom a given prospect is related, you can scan round the complete circle and come back to him again. Do not make your 'circles' too big.

You will also find this facility useful for relating branch offices to a head office, and relating a contact's business address to his private address.

CLASSIFICATION & STATUS

To the right of the name & address box is the CLASSIFICATION & STATUS box which was mentioned briefly in the Chapter 11.

The main part of this box is made up of two columns - one containing key names and one containing key values. Within the context of MARKETEEER, a 'key' is something which helps describe a particular prospect in terms of a general quality or characteristic possessed by all prospects.

A 'value' is the particular aspect or manifestation of that characteristic or quality which applies to that prospect.

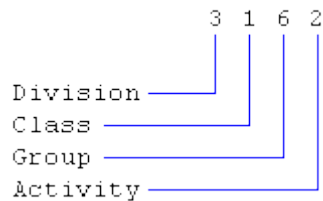
For example, all your prospects - corporate entities excluded - possess the attribute we call 'SEX'. We could therefore have made 'sex' one of the keys whereby MARKETEEER described - or more correctly, classified - all your prospects. Under this scheme, each prospect would be designated as either 'male' or 'female'. Thus, a key called 'sex' would have two possible values - 'male' and 'female'. As each prospect can have only one of these values, the 'sex key' helps describe him or her in terms of everybody else on file.

With all your prospects so classified, MARKETEEER'S targeting facility would allow you, for example, to print two separate lists - one of all your male prospects and the other of all your female prospects. You could then perhaps send a different version of your sales letter to those on each list. Sex is used as an example because it is easily understood. However, it is not really relevant or useful for the purpose for which MARKETEEER was designed. It is therefore not included as one of the actual keys.

SIC Number

The first real key used by MARKETEEER is the Government's STANDARD INDUSTRIAL CLASSIFICATION (SIC) number. Every business operating within the United Kingdom is given a 4-digit number which indicates the type of activity in which that business is mainly involved. This enables you to record the precise trade of each of your prospects, thus giving you an insight into his likely needs and the right approach for making a successful sale.

The structure of the SIC number is illustrated by the following example:



The first digit specifies to which of the ten SIC Divisions the particular prospect's business belongs. These divisions are:

- 0 Agriculture, Forestry, Fishing
- 1 Energy & Water Supply industries
- 2 Extraction of Minerals & Ores
other than fuels, Manufacture of
Metals, Mineral Products, Chemicals
- 3 Metal Goods, Engineering, Vehicle
industries
- 4 Other Manufacturing industries
- 5 Construction
- 6 Distribution, Hotels, Catering,
Repairs
- 7 Transport & Communication
- 8 Banking, Finance, Insurance,
Business Services, Leasing
- 9 Other Services

Generally, each DIVISION is subdivided into CLASSES, each CLASS is then subdivided into GROUPS, and each GROUP is then subdivided into ACTIVITIES. However, there is far more to it than that, so to be able to make effective use of this valuable system, you should study the Government booklet called 'Standard Industrial Classification Revised 1980' which is available from the HMSO, PO Box 276, London SW8 5DT.

Notice that the 'SIC NUMBER' key is Key N° 1 as shown by the '1' adjacent to the key name. The cursor is located at the first character position of the command word entry field at the bottom of the screen. The instructions at the bottom of the screen tell you that to amend a value you should type-in the key number. Currently the value of the SIC key is '0000'. This means that the SIC number for 'Smith & Jones Products Ltd' has not yet been entered.

So please type-in a '1'. The cursor moves to the left-most '0' of the SIC field. Suppose that Smith & Jones Products Ltd are in the metal goods industry. More precisely, they restrict their operations to the manufacture of cutlery. The booklet shows that their full SIC number is therefore 3162. So please type-in '3162' and then press the carriage return. The cursor returns to its former position at the beginning of the command entry field at the bottom of the screen.

From now on, if ever you need to list all your prospects in the Metal Goods industry, Smith & Jones Products Ltd will be included. However, if you make the restriction more specific so that it includes only manufacturers of metal furniture (SIC No 3166), then Smith & Jones Products Ltd will not be included because they make only metal cutlery (SIC No 3162).

Sales Area

The next key is the Sales Area key. This would be N° 2, but as the sales area is determined automatically from the prospect's postcode, the option for altering it is not provided.

Relation

Key N° 3 is called 'relation' and its current value is 'unspecified'. Prospective customers need not be the only kind of people you keep on file. For example, you may find it useful to keep potential suppliers on file as well. There are also those contacts who, while never being likely to buy anything from you directly, may well exert tremendous influence over others who will.

Now please type '3'. The name & address box is replaced with a similar box containing the values which you originally set up for the Relation Key during your study of Chapter 5. Now please decide which of these values applies to Smith & Jones Products Ltd. Then scan the cursor to the value you choose using the arrow keys and press the 'Ins' key to select it. An asterisk appears next to the value you select. Now press the 'F1' key to store it.

The name & address details reappear on the screen. Notice that the value you have selected appears in the CLASSIFICATION & STATUS box opposite the Relation key title. So from now on, whenever you request a target list containing all prospects with the relation value you have selected, Smith & Jones will be included in that list (provided no other condition causes them to be excluded).

Now select the Relation Key again by typing '3'. When the list of values re-appears, you will notice that there is an asterisk against the value you selected. The asterisk always indicates the value of the key which is currently 'in force' before you amend it. Naturally, when the value of a key is 'unspecified', no asterisk appears.

Status

Key N^o 4 is called 'status' or 'progress' and its current value is probably 'new'. Whenever a new prospect is first entered onto MARKETEEER his status is automatically set to the first value in the list of status values. Please type-in '4'. The display changes as before, but this time shows the full list of values for the Status Key which you originally set up during your study of Chapter 5.

Since you have not yet contacted Smith & Jones Products Ltd, perhaps you should leave their status as 'new' (or whatever you decided to call your initial status value when you set up your status values in Chapter 5). So press the 'Esc' key. The original display now returns to the screen with the Status Value unchanged.

Please note that the Status Key must be set to a valid value. If you try to delete the asterisk in the Status Values box, then Marketeer will put the default first value in again. This is because Marketeer recognises a prospect record as existing by virtue of its status key being set to a valid value. If it is set to none of its valid values, this indicates that the record has been deleted or KILLED and is therefore unoccupied.

Product/services

Please type '5' for the Product/services Key. The box which replaces the name & address box now contains the full list of values which you set up for the Product/services Key while studying Chapter 5. Unlike with the other keys for which each prospect can have only one value, any one prospect may have anything from 1 to 15 of the Product/services key's 18 possible values.

Consider our sample key called 'sex' with its two possible values, 'male' and 'female'. It is not difficult to see that any given person can hold only one value of this key. Now consider a key called 'food' whose values are 'beef', 'fish', 'potatoes', 'rice', and 'apples'. We can see that if we use this key to specify what people like to eat, then each person can have more than one value of this key at the same time.

The two keys are fundamentally different. The first expresses a mutually exclusive characteristic or property. It tells you something about the singular overall nature of the thing it describes. The second relates to composition. It tells you something about the component parts or needs of the thing it describes.

While studying Chapter 5, you set up the values of the Product/services Key, each of which represented one of the products or services produced or provided by your company. What you now have to do is, bearing in mind the type of business they operate (as shown by their SIC number), decide which of these products or services are likely to be of interest to Smith & Jones Products Ltd. Generally, they should be interested in more than one.

So as an exercise, please have a think about which of your products or services this fictitious customer is likely to be in the market for. Then type-in the letters corresponding to the products or services you decide upon. As you select each value, an asterisk appears against it.

Once you have selected all the values (goods or services) which apply to Smith & Jones Products Ltd, please press the 'End' key to record the values you have just selected in Smith & Jones's 'attributes' record within MARKETEEER'S database. After this, the original display returns to the screen.

Selector Code

Please enter '6' to select the Selector Code. The cursor locates at the start of a 16-character field in the CLASSIFICATION & STATUS box. The selector code is a string of 16 characters. You may assign whatever meaning you like to any one or any group within the 16 characters. For example, the first two characters of the selector code could be the initials of the sales rep responsible for the prospect concerned. The next character could be a financial turnover rating from 0 to 9. An arbitrary example is shown below:

```

                JB5810876////////
Sales rep's Initials ————|
Turnover Category 0-9 ———|
No. Employees 0-9 ————|
Month of last sale MMY ———|
Value Last Sale 0-9 ————|
Unallocated codes —————|

```

You could define a 0 to 9 category as a range of values. For example the prospect's turnover code could be defined as:

- 0 up to £10,000
- 1 £10,000 to £100,000
- 2 £100,000 to £250,000
- 3 £250,000 to £1,000,000
- 4 £1 million to £10 million
- 5 £10 million to £50 million
- etc.

Alternatively, you could have a range of letters A to Z to represent the values of an item within the selector code.

This means that if you wish to define a target list of all your prospects who, while being restricted to whatever ordinary key values you specify, have a turnover between £250,000 and £1 million a year, you simply set the target selector code's 3rd character to 3. This will be explained in more detail in the next chapter.

EVENT KEYS

The lower part of the CLASSIFICATION & STATUS box contains the two event keys. The first one, Key 7, concerns the last sales/marketing event which has actually taken place between you and this prospect. It gives the type of event which occurred - eg letter, phone call, telex, visit - and the date on which it occurred. Also, as a convenient indicator, it tells you how many days have elapsed since the event took place. The second one, Key 8, concerns a possible future event. This states the type of event you have planned as the next event which should take place, and the date on which you have scheduled it to occur. Also, the number of days to go before the event is to take place is shown as a negative number of days or 'countdown'.

Latest Event

Please enter the digit '7'. The name & address box is now replaced with the key values box containing the values of the event key - namely the various types of sales/marketing event which you defined during your study of Chapter 5. If you had just visited Smith & Jones, you would select

the 'We visited them' value, whatever you have called it, by moving the cursor down to that value and selecting it by pressing the 'Ins' key and then the 'End' key.

Notice the first 6 values of the Event Key. Although you can change the actual wording of these to what you like, their respective meanings must remain the same. This is because the Mailing, Telephone and Telex/Email subsystems automatically update the last-event key to its appropriate value and set the event date to the current date whenever a letter is sent, a phone call is made or a telex/Email message is sent to the prospect concerned. Now please press the 'Esc' key.

Date of Last Event

Instead of returning to the original display as with the other keys, a date entry field appears below the key values box. This is where you would enter the date of the event whose type you would have just selected. If you do not wish to change the date already shown in the CLASSIFICATION & STATUS box, simply press the 'Esc' key. If you wish to enter today's date, all you need do is hit the space bar. Otherwise enter the date of the event and press the carriage return key. The event values box and the date entry field are replaced by the name & address box and the command words, and the new event type and date appear in the CLASSIFICATION & STATUS box if they have been changed.

Next Event

Exactly the same procedure applies for altering the type and date of a scheduled future event. However, the Mailing, Telephone and Telex/Email subsystems do not automatically update the first six values of the 'next' event. You decide on and then enter manually the type & date of the next event you plan for each prospect.

DIARY NOTES

Now that you are back in the command entry field, please enter the NOTE command or press F7. The entire screen now becomes occupied with a diary box with a narrow column for dates on the extreme left and a very wide column for notes filling the rest of the screen width. Notice that the first free line has been automatically date stamped with today's date and that the cursor is at the start of the notes section of this line.

Each time a significant event takes place with regard to this prospect, you can enter an automatically date stamped free-form note relating to the event. You may continue a single note to as many lines as you wish, but it is sensible to make your notes concise enough to fit on one line. When all 12 lines of the diary have been filled, next time the diary for this prospect is accessed, all the lines are moved up by one position to make room for a new note at the bottom. This means that the note originally on the top line (the oldest) is lost. You thus have a self-purging diary of the 12 most recent events for each prospect on your database. Press 'Esc' as many times as is required to return you to MARKETEEER'S main menu.

Eastern Business Systems "Marketeer": User Manual

Chapter 13: Defining Target Sectors

INTRODUCTION

In the previous chapter, we specified the precise CLASSIFICATION of Smith & Jones Products Ltd by assigning to them a specific value for each of the Keys (more in the case of the Produce/services Key). Thus, Smith & Jones Products Ltd's position within your overall marketplace became precisely defined within MARKETEEER'S database. In a later chapter, when you come to set up your database 'for real', you will go through this process of assigning key values for each of your real (ie non-fictitious) prospects - the ones you are actually selling to. MARKETEEER'S database will then be a systematic model of your actual market.

This process is essentially that of CLASSIFYING or setting up a profile to fit a prospect. You start with an actual person or company and define a profile to fit them. In this chapter, however, we invert the process. We start by defining a profile and then see who fits it.

Suppose we liken our search for the right prospects to the prince's search for Cinderella. In the first process, we start with Cinderella and then make a slipper to fit her. In the second process, we make the slipper first and then search for Cinderella by finding out whose foot the slipper fits. Unlike the prince, however, we hope to find as many Cinderellas as we can. But please don't take the analogy too far!

The first process categorises each identifiable prospect as he is discovered and recorded. The second process defines the broad classification or profile of the ideal but as yet unidentified prospect for a specific sales/marketing exercise. The former is usually a very tight definition fitting only one (or perhaps by co-incidence two or three) of the prospects you have on-file. The latter, however, is usually rather broader, embracing several if not many of the prospects you have on file.

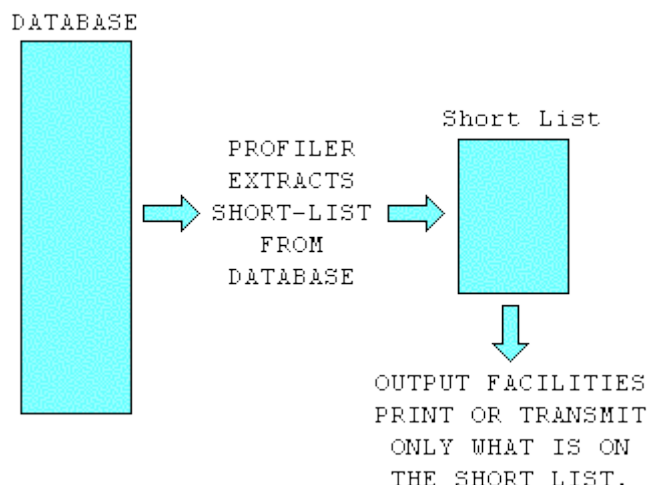
Within the context of MARKETEEER, a sales/marketing exercise is defined as any 'packaged' stab at the market such as a mailshot, a telephone campaign, a sales seminar, an exhibition or any combination of these. As a working example of a sales/marketing exercise for this chapter, we shall suppose that you want to organise a pilot seminar at a hotel in Cambridge to introduce a new product to its most likely buyers within easy reach of the chosen venue.

THE TARGETING FUNCTION

The function of MARKETEEER'S Targeting Facility is to search out from all the prospects currently held on the entire database all those prospects who qualify as subjects for the particular sales/marketing exercise you currently have in mind. It then puts all the prospects who qualify together on a SHORTLIST which it stores on the disk. It does not print the shortlist at this stage.

In the case of our working example, the shortlist would comprise those prospects whom we should invite to our seminar in Cambridge. The SHORTLIST is later used to generate a mailshot list, a telesales calling list and a telexshot transmission list.

These are discussed in detail in the next chapter. The shortlist extraction process itself is illustrated below:



We have no idea what values you gave to MARKETEEER'S keys during your reading of Chapter 5. However, for the working example which we shall use in this chapter and the next, we need to be able to refer to selected key values by name. We will therefore refer back to our original key values for this exercise. You will have to transpose them mentally to the corresponding values you set up for your market in Chapter 5.

From MARKETEEER'S main menu, please select Option 2 - 'Target Profiles'. On the right of the screen appears a Target Profile box. This has exactly the same layout as the CLASSIFICATION & STATUS box discussed before.

On the left appears a Target Status box which gives the number of prospects which currently make up your entire market and the number and percentage of those prospects which fit the Target Profile specified on the right. The time & date of the last time this Target Profile was used to extract a short list is also given, and an indication as to whether or not a printout of it exists yet.

TARGET PROFILE

The Target Profile box lists all 8 keys which you can use to narrow down the type of prospect you want to involve in your current sales/marketing exercise.

If you wish to limit the output shortlist to include only those prospects who have one of only a limited number of the possible values of a certain key, you simply specify the values which you wish to allow through. For example, if you wish to restrict your shortlist to prospects with the 1st, 6th and 8th values of the 'STATUS' key, then you select the Status Key by entering a '4'. A box showing the values of the Status Key then appears in the right of the screen in place of the Target Status box. You then move the cursor to each required value in turn and select the value by pressing the 'Ins' key. You then press the 'End' key to store your selections.

If, on the other hand, you do not want a particular key to influence who does or does not appear on the shortlist, you simply ignore that key in the Target Profile. In other words, you do not specify any values for it. Specifying no values for a particular key has essentially the same effect as specifying all its values. However, in the latter case only, any prospect who has not yet had a value assigned for that key (ie the key is shown in his record as 'Unspecified') will not be included in the shortlist.

Target Name

Please enter the NAME command (or press F5). The cursor moves to the name field at the top of the Target Profile box. Please type in the name for the Target Profile. Suppose we call it 'Seminar' to indicate that it is to be used for generating a shortlist of prospects to be invited to our seminar in Cambridge. Then press the 'End' key to store the new name. You can 'Esc' from the name field if you decide not to alter it. The cursor then returns to the command entry field.

SIC Number

The first key in the list is the SIC Key. Please select the SIC Key by typing '1'. The display now changes. You see 18 4-digit fields arranged into 2 columns. Here you may fill in as many (up to 18) or as few of these 4-digit fields with SIC numbers as you wish.

Furthermore, this 4-digit field can act as a 'zoom lens' which you can open out to cover an entire SIC division, or stop right down to a single SIC activity. Thus, if you enter only a '3' in one of these fields, you will automatically include all prospects who operate within the 'Metal Goods, Engineering and Vehicles Industries'. If you type-in '32' then you narrow down the field of view to include only the 'Mechanical Engineering' class within that division.

If you type-in a further '2', you narrow down the 'lens' still further to include only the 'Metal Working Machine Tools and Engineers Tools' group. Adding a further '1' stops your lens down to its narrowest field of view so that only prospects who are engaged in the actual 'activity' of manufacturing 'Metal Working Machine Tools' are included.

Once you have typed-in all the SIC divisions, classes, groups and activities you wish to be included as part of your target profile, you press the 'End' key to store your SIC selections. For the purpose of our working example of a Target Profile, we shall include the whole of the 'Metal Goods, Engineering and Vehicle' industries. So please type in a '3' and then press the 'End' key. You will now see that the word 'restrictions' appears in red (in place of the word 'unrestricted' in grey) adjacent to the SIC key in the Target Profile box.

Sales Area Key

Please type-in a '2'. A box containing your sales area names now appears on the left. You can now select which sales areas you wish to include in your Target Profile. This means that, provided they are not excluded by any other key restriction, all prospects located in any of the sales areas you select will be included in a Target Shortlist generated from this Target Profile. For our working example, we must limit invitations to our seminar to prospects within reasonable travelling distance of the Cambridge venue. We shall therefore restrict invitations to our 'Anglia' sales area. So please press the 'Ins' key to select 'Anglia' and then the 'End' key to store the selection.

Relationship Key

The next means of narrowing down your target profile is the Relationship Key. So please type-in a '3'. The box on the left now contains the values of the Relationship Key. You may now restrict your Target Profile further by allowing only those prospects to be included who have one of the relationships you select here.

If you specify only one value of the Relation Key for a target profile, naturally, the profile is very narrow. Usually, you will want your target profile to be somewhat broader than a single value. For

our working example of a target profile, please select three values such as 'Customers', 'Dealers' and 'Trade Press' or whatever values you wish out of the ones you set up during your study of Chapter 5. Then press the 'End' key to store your selections.

So far then, based on our original values for this key, your Target Group has been narrowed down to include only 'Customers', 'Dealers' and 'Trade Press' within the Metal Goods, Engineering & Vehicle Industries who reside within the Anglia sales area.

Status Key

The next means of narrowing down your target group is the Status Key (although you may have called it something different such as the 'Progress Key'). Selecting values for this key is exactly the same as for the Relationship Key. Let us suppose that we only want to include prospects who have 'Responded' to a recent mailshot or telesales call. So please use the 'Ins' key to select the value 'Responding' (or whatever term you have used to denote a prospect who has just started to warm to your sales efforts). Then press the 'End' key to store the selection.

Product/services Key

Unlike in the case of assigning values to individual prospects as discussed in the last chapter, the Product/services Key here behaves in exactly the same way as the other keys. In fact, with this key, you will probably include less of the up to 18 possible values when defining a target profile than will actually be assigned to most of your prospects individually. For our working example, let us suppose that we wish to use this seminar to introduce a new product line. So please select key number 5 and then, from the product lines or services which you set up during your study of Chapter 5, select the one of your choice.

Selector Code

Please select the Selector Code key by typing in a '6'. The box which appears on the left is empty this time. It contains no pre-set key values. In the previous chapter, we discussed briefly how you could divide up the 16-character selector code into separate fields of one or more characters where each field represented a factor which you could use as a means of selecting prospects. For example, in the previous chapter, we showed an example which used the third character of the Selector Code to denote the prospect's turnover.

Suppose you wish to limit your seminar invitations to those prospects with a turnover between £100,000 to £1,000,000. According to the coding shown in the example in Chapter 12, this means prospects whose 3rd code character is either a '2' or a '3'. For this, you need to enter two coding rows as follows:

```
**2*****
**3*****
```

The asterisk is the 'wildcard' character. It tells the selection process to ignore the values of any characters in all positions where it occurs. You then press the 'End' key to store the code selections.

Event Keys

There are two event keys - a Last Event key and a Next Event key. However since they both have exactly the same set of values, we set up what appeared to be only one event key when defining

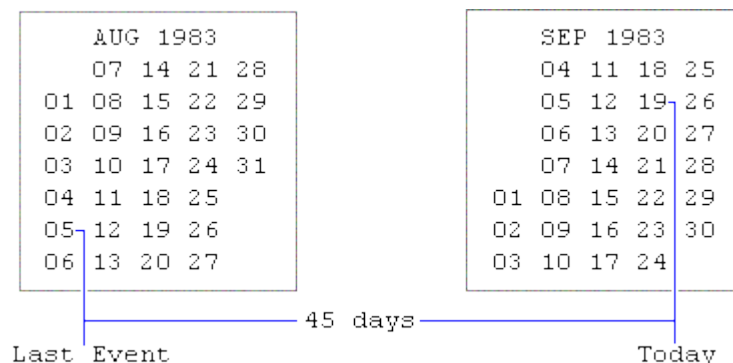
your market in Chapter 5. The Last Event key and Next Event key are keys 7 & 8 of the Target Profile. Unlike the other keys, they not only have a value (namely Event Type), but also a time element.

Last Event

Please select key number '7' - the Last Event key. The values for the Last Event Key now appear in the box on the left. Let us restrict invitations to our seminar to those prospects who have recently responded to our mailshot or telesales calls, so please select the 4th and 5th values using the 'Ins' key and then press the 'End' key to store your selection. (Note that Mailshot and Telesales events must be values 4 and 5 of the Event Keys since the Mail and Telephone subsystems assume this when automatically updating prospects' event keys after printing a letter or dialling a telephone call.)

Elapsed Time

In place of the box containing the Event Key values there now appears a box containing two fields for entering elapsed times (in days), together with instructions for entering them. Suppose that the last time you were in touch with Smith & Jones Products Ltd was when you phoned Mr Basil Davis on Friday the 5th August to ask him for a decision on his prospective purchase of the new equipment he was thinking of buying from you. It is now Monday the 19th September.



As shown by the illustration, the ELAPSED TIME since their latest event is now 45 days.

Although the concept of elapsed time is fairly simple, MARKETEEER uses it in a very sophisticated way to give you the option of specifying a 'time window' such that any prospect whose last event falls within the 'time window' is included on the target shortlist while all others are excluded. A time window is defined by its boundaries or cut-off points T1 and T2.

T1 must always be greater than T2. In other words, T1 must be a point in time before T2. T1 and T2 are each specified as a number of days (past or future) from 'today'. A number of days in the past is specified as a positive number: a number of days in to the future is expressed as a negative number. For example, 30 days ago is entered as +30: 7 days hence is entered as -7.

If you set T1=90 and T2=30 then you have defined a time window between 90 days ago and 30 days ago. It will 'capture' all prospects whose last event occurred somewhere between 3 months ago and one month ago. If you set T1=30 and T2=-30, you have defined a time window stretching from 1 month ago to 1 month hence. If you set T1=-30 and T2=-60, you have defined a time window stretching from 1 month hence to 2 months hence. If you set T1=30 and T2=0, you have defined a time window covering the last month up to and including today. If you set T1=0 and T2=-7, you

have defined a time window covering the coming week. If you set T1=0 and do not specify T2, you have defined a time window covering the whole future. If you set T2=0 and do not specify T1, you have defined a time window covering the whole of the past.

If you set T2=30 and do not specify T1, you have defined a time window stretching from 30 days ago to a point infinitely into the past. If you set T1=-30 and do not specify T2, you have defined a time window stretching into the infinite future starting from a point in time 30 days from now.

The applications of these time windows to the various situations which crop up in selling and marketing are boundless. The ways in which you may take best advantage of them will become obvious with thought, time and use. But for the sake of illustration, let us suppose that you wish to invite to the seminar all those prospects whom you have contacted during the past three months. So set T1=90 and T2=0 then press the 'End' key.

The command words return to the screen, and the event type and event time are now shown in the Target Profile box as imposing 'restrictions' on the target. Prospects who have received a mailshot or a telesales call within the past three months will be thus included in a target list generated from this target profile - provided of course that they are not excluded because they do not meet the conditions of another key restriction in the same target profile.

Automatic Diary

Suppose that after the seminar, you arrange to visit each attendee. You will have to visit each one on a separate date in the future. You amend the 'DATE OF NEXT EVENT' of each prospect to that of their respective visiting dates as described in the previous chapter. Then, each week, you can set up the same target profile but instead of the Last Event restriction, you put in a Next Event restriction (Key 8) with the time window set at T1=0 and T2=-7 to shortlist all those you have arranged to visit that week.

In conjunction with the Record Listing facility described in the next chapter, MARKETEEER can thus produce for you a weekly visiting list. The database thereby acts as a dynamic (or moving) diary forever providing you with THIS WEEK'S visiting schedule.

THE FINISHED TARGET PROFILE

All the key restrictions we have imposed on this Target Profile work together as follows. For a prospect to be included on our shortlist (ie for him to be within our Target Profile), he must be in the Metal Goods, Engineering or Vehicle Industries (SIC Division 3) AND be a prospective 'customer', 'dealer' or 'member of the trade press' AND have responded to one of our mailshots or telesales shots which occurred within the last 3 months AND be in the market for the new product line you selected AND be located in the 'ANGLIA' sales area AND have a turnover between £100,000 and £1 million.

As you will probably realise, this is a very tight profile, and you would normally be lucky to find any prospects who would not be thrown out on one count or another! However, you would normally make use of only one or two of the possible restrictions in any given target profile.

OUTPUT SEQUENCE

What you have so far specified simply determines who will and who will not be placed on your output shortlist. What you have not yet specified is the order in which those placed on the list are to

appear within it. Please enter the ORDR command or press F9. The Output Sequence Options which appear in the box on the left of the screen offer you six choices as to the order in which the selected prospects are to be presented.

Straight Lists

When you want a simple straight forward reference list of the prospects who fit your specified target profile you select 'Alphabetic Order'. Similarly, when you want your prospects listed in the order in which their files are stored in the filing cabinet, you select the second option, 'Reference N° Order'. This is particularly useful when researching more deeply into prospects' histories from the filing cabinet prior to meeting them at the seminar for instance.

Sub-divided Lists

Suppose you organise your seminar staff so that there is one sales rep for each postcode area. In other words, one sales rep is given the task of looking after all attendees from the Chelmsford area (CM), another is assigned to those from the Cambridge area (CB), another takes care of those from the Colchester area (CO), and so on for all the postcode areas which make up the ANGLIA sales area.

So that he can know to whom he should attend, each rep needs a list of just those prospects from his postcode area. And so that he can quickly find the name of each new arrival, he needs this list presented in alphabetic order. For this situation, you select the third option. This causes the shortlisted prospects to be presented in alphabetic order WITHIN postcode area, thus effectively creating a separate alphabetic list of attendees for each postcode area.

Options 4 & 5 are provided for sales operations with a very high prospect density where smaller geographic units are required. For example, if instead of covering a whole sales area, you intend to invite to your seminar only those prospects located within a single postcode area, then each rep may look after attendees from only one district or even one sector within that area. You therefore need the invited prospects to be listed in alphabetic order within district or sector.

Visiting Lists

The two-letter code for a post area is usually an abbreviation of the name of the town within that area at which the main area sorting office is located. Adjacent postcode areas therefore are not likely to have alphabetically adjacent code letters. That is why MARKETEEER employs user-defined sales areas as a means of concatenating (linking together) postcode areas into larger contiguous units.

However, within a postcode area, the districts are numbered in geographic order - ie to follow major road routes. The same is true for the numbering of sectors within a district. Thus, if instead of listing prospects so that their names are in alphabetic order, you list them so that their postcodes are in alphabetic (or more correctly, alphanumeric) order, they are by consequence listed in the best order for visiting - ie in optimum route order.

Suppose, therefore, that after the seminar, you give your reps the task of following up all the interested attendees with a personal visit. You would use Option 6 to produce a list of attendees in alphabetic order of their postcodes. Thus, each rep would have a list of the prospects he should visit in the best travelling order - ie the order in which he should visit them for minimum mileage and travel time.

Each rep would then telephone each of the prospects in his section of the list trying to arrange as many visits as possible on as few dates as possible. He can then 'travel' the route as many times as dates he needs to make, visiting on each date those within his list that he has arranged to see on that date. In the example below, the 12 prospects from the Chelmsford area are listed in visiting order:

PROSPECT	POSTCODE	VISITING DATE
1	CM01 2	12 SEP
2	CM01 5	16 SEP
3	CM07 1	16 SEP
4	CM07 4	16 SEP
5	CM07 7	12 SEP
6	CM12 4	12 SEP
7	CM12 8	16 SEP
8	CM15 3	16 SEP
9	CM19 4	14 SEP
10	CM19 6	16 SEP
11	CM20 4	12 SEP
12	CM23 3	12 SEP

Suppose that on telephoning each of them after the seminar, the rep concerned finds that he can arrange to see 5 of them on the 12th of September and 6 of them on the 16th of September, while one is available only on the 14th. He thus has to make 3 trips along his route in order to visit all his prospects. However, because they are listed in postcode order, his mileage and travelling time for each trip is kept to a minimum so that he can spend as much time as possible with each prospect.

Arranging the shortlist in straight postcode order also enables you to print sales letters or mailing labels so that they can be grouped easily into postcode areas, districts or sectors. This is useful when you want to make sure that your mail arrives at all your prospects' desks nationwide in the same morning post. In fact, the Post Office offers discounts for mail pre-sorted in this way, but the quantities necessary to qualify for such discounts are currently rather enormous.

Choice Of Output Sequence

At the moment, however, we are still preparing for the seminar. Therefore, the obvious choice of output sequence is Option 3 - 'Alphabetic Order Within Postcode Area' so that each of the reps at our seminar can have his own alphabetic sub-list containing only those attendees who come from his allotted postcode area. Please therefore move the cursor to this option and select it by pressing the 'Ins' key and then the 'End' key.

PRODUCING THE SHORTLIST

So far, we have merely specified the profile (qualifications if you like) of the prospects we wish to invite to the seminar, and of course the order in which we want them 'listed'. However, MARKETEEER'S database has not yet been searched to determine who actually does and who does not fit this target profile. In other words, the shortlist has not yet been produced. So please now enter the 'EXTRAct' command (F6) to start the process of searching the database and compiling the target shortlist.

MARKETEER now begins this search in which it checks the key values of each prospect currently on file to see whether or not they fit the Target Profile you have just completed. Those prospects whose key values fit the profile are placed on the shortlist, while those whose key values don't fit are simply omitted.

The box containing the Output Sequence Options is now replaced by a box containing technical data associated with the extraction process. This technical data was mainly for use during the software development of MARKETEEER. It has been left in purposely to help with the development and testing of customised adaptations and additions to MARKETEEER specially requested by certain users. However, it is of general value in that it confirms that MARKETEEER is in fact doing something, and it also gives some indication of progress as MARKETEEER is combing through the database extracting the profiled shortlist.

The items of general interest on this display are as follows. The INDEX SIZE is the number of prospects currently on file. The FILE SIZE is the same as the HIGHEST OCCUPIED RECORD discussed in the previous chapter. The SEQUENCE is the option number of the OUTPUT SEQUENCE which you have just selected. The RECORD NO is the number of the prospect record currently being checked. ACCEPTED & REJECTED show the numbers of prospects who have been found respectively to fit and not fit the profile so far in the search. The extraction process can take a long time, depending on how many prospects you currently have on file. Once it has finished, the original command words return to the screen.

Sifting Your Target List

Assuming the extraction process has finished, and that at least one prospect has been found to actually fit this very tight Target Profile, please enter the SIFT command or press F7. The name & address and CLASSIFICATION & STATUS of the first prospect on your new target list are then displayed. The NEXT command takes you to the next prospect on the target list and so on to the end of the list. The PREV command allows you to step back through the list. The CULL command allows you to cull out the currently displayed prospect from your target list. This is useful when although the prospect meets all the qualifications for being included on the target list, there is some special reason why you do not want him to be included. Now press 'Esc'.

NEXT & PREV

The Target Profile we have just set up in this chapter is Target Profile No. 1. In fact you can have up to 18 Target Profiles set up on MARKETEEER at any given time. You get to the other Target Profiles by entering the NEXT & PREV commands (or pressing F3 & F4 respectively). You can generate a Target Shortlist from each of these Target Profiles, thus ending up with 18 current Target Shortlists on file at once. Any one of these Target Shortlists can be used to generate a mailshot list, a telesales calling list and a telexshot list at any time. Scan round the 18 Target Profiles using the NEXT command. They will not contain any sensible key restrictions until you actually set them up.

NOTE: If the target profile you entered during your study of this chapter captured less than 20 prospects on the Target Shortlist, please go back and reduce the restrictions in the Target Profile, then re-extract the Target Shortlist. Start by restricting your target to those prospects in your sales area which contains Cambridge without restricting it by any other key. If this yields more than 40 prospects, then set a restriction using one of the other keys as well - and so on until you yield between 20 and 40 prospects on your Target Shortlist. The Target Shortlist you produce here will be used to demonstrate the printouts and the mailshot, telesales and telexshot list generation functions in the next chapter.

This completes your introduction to setting up target profiles, so please now press the 'Esc' key until you return to MARKETEEER's main menu.

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Chapter 14: Creating Prospect Lists

From the Main Menu, please select Option 2. Then when Target Profile No 1 appears with the command words beneath it, enter the LIST command (or press F8). The Target List Menu then appears. Please use the down-arrow key to scan through the explanatory texts for each of the Target List options and study each one carefully.

TARGET PROFILE SPECIFICATION

Please switch on your matrix printer and select Option 1. Then follow the screen instructions for printing out the Target Profile Specification. When printed, study the Target Profile Specification. Its content is self explanatory. It gives you a permanent record of the Target Profile concerned and the most recent Target Shortlist extracted from MARKETEEER's database using that Target Profile. It is the central definitive document for any Name & Address List, Name & Key Values List, Name & Address Labels Set, Mailshot Printing List, Telesales Calling List and Telexshot Transmission List derived from that Target Shortlist.

NAME & ADDRESS LIST

Now please select Option 2 from the Target List Menu and follow the screen instructions for printing out the Name & Address List of all the prospects who were found to fit Target Profile No 1.

Temporary Halt

While it is printing, the matrix printer, no matter what lengths you go to in fitting it with a silencing hood etc, does make a fair amount of noise. This can be a problem if you have to answer the telephone or somebody comes in for a quick word during a long printout. In such an event, you can press the carriage return key. This will cause MARKETEEER to stop printing temporarily. As you do so, the message changes to tell you that to re-start the printout, you should press the carriage return key again. So after you have finished your phone call, or when the person who nipped in for a quick word has gone, you simply press the carriage return key again to cause MARKETEEER to resume printing from where it left off.

Abort

It is not unknown for people to start a long printout only to discover that the printer is just about to run out of paper! If this happens to you, all you need do is press the 'Esc' key to abort the printout. When you do this, MARKETEEER returns you to the Target List Menu. You may then re-load the printer with a new box of paper and start the printout all over again. The ABORT facility is also useful in the now very rare event that the paper becomes jammed inside the printer. Please note that in addition to being able to abort a printout which is currently in progress, you can also abort a printout while in the temporary halt situation.

Report Heading

The top heading line of the listing shows the 'Target No.' of the Target Profile through which the Target Shortlist (from which this listing was produced) was extracted. The 'Serial No' shown is that of the Target Shortlist itself.

The date shown on the top line is the date this listing was printed. The second title line shows the name of the Target Profile through which the Target Shortlist was extracted plus the time & date the Shortlist was extracted from MARKETEEER's database.

Line Format

All the details relating to a given prospect are contained within a single 217-character print-line. This is essential in order to give the listing the neat tabular appearance which makes it quick and easy to read. Every 6th line is skipped (ie left blank) so that the prospect information lines are effectively grouped into blocks of five. This further enhances the clarity of the listing.

Except for the CROSSREF field, the first 37 characters of a listing line comprises 'key' information which MARKETEEER uses to ACTIVELY select and sequence prospects for a Target Shortlist. This information is organised into columns to make it easy to scan. The remaining 180 characters of the line contains those details of the prospect which MARKETEEER treats only as passive information which it does not use in its process of selecting or rejecting the prospect for a given Target Shortlist or for sorting him into one of the 6 optional listing orders. This PASSIVE information comprises the prospect's name & address, telephone & telex numbers, name & title of contact, plus additional free-form notes and comments.

The Key Fields

The ACTIVE (key-type) information relating to each prospect is printed in columns across the first 37 characters of his print line.

The content of each column is identified by a heading within the Heading Line which appears immediately above the main body of prospect information lines on each page of the listing.

- Namecode: A prospect's name & address line begins with his namecode because this is the primary key by which he is identified within MARKETEEER and is therefore the most likely one to be used when searching for him in a listing.
- Ref Number: Before the seminar, each rep should read up on the background of each of his prospects and review their past correspondence & sales notes. These are kept for each prospect in his numbered file in the filing cabinet. The Ref Number shown on the prospect's name & address line is the number of his file in the cabinet where these 'paperwork' details are stored. Thus, as has been pointed out before, MARKETEEER'S virtue is NOT in storing vast quantities of information about each prospect. Rather, it is in identifying quickly those relatively few prospects who are precisely relevant to your job in hand. MARKETEEER thus allows you to spend your time far more profitably in studying your few most relevant prospects in depth rather than skating through the details of many, most of whom you will inevitably dismiss as inapplicable.
- CrossRef: This is the XREF field as shown in a prospect's name & address box when displayed on the screen. It is included as a separately tabulated field for easy reference.

Because of its intrinsic nature it is not usable by the Targeting Subsystem for actively selecting prospects for a Target Shortlist. Its use is simply for on-screen 'who knows who' searches.

- **Postcode:** The first two letters of a postcode specify the post area. Please scan down the postcode column of your printout. Notice that all the prospects in the same postcode area (ie with the same two initial postcode letters) are grouped together. Now please take a coloured felt tip pen and a ruler and draw a line right across the printout at each point where the initial postcode letters change. The printout is now visually divided into the different postcode areas within the ANGLIA sales area. Thus, for our working example of the Cambridge seminar, what appears between each pair of coloured lines is the list of prospects to be looked after by each of your respective reps. Now please scan down the Namecode column. The namecodes between each pair of lines are in alphabetic order. Each rep thus has an alphabetic list of his own prospects.
- **Sales Area:** To save space and leave sufficient room for the prospect's name & address details on the same line, the sales area here is shown as a single letter A through R. The sales area's name can be determined by counting through the alphabet down the sales area names column on the Target Profile Specification printout.

Name & Address Fields

The 9 passive 'name & address' fields can contain anything up to 27 characters each. So there is insufficient space within the 180 characters available to print them as separate columns. However, we also know from Chapter 11 that as these items are typed into a prospect's name & address box, MARKETEEER imposes an automatic restriction which ensures that together their lengths can never add up to more than 156 characters.

There is enough room, therefore, to fit them into the 180 characters of remaining line-space provided they are printed in free-form, that is, provided they are printed one after the other 'as they come' straight across the line. This leaves 24 characters worth of space still to spare. But since the fields are not separated into columns, extra punctuation characters have to be inserted in order to separate them visually. These account for the remaining 24 characters of spare line-space.

Since none of this information is ever used for selecting or sorting, you will never need to scan any of these fields individually to search for a particular 'value'. Nothing is lost, therefore, by having them printed free-form rather than in separate columns.

NAME & KEY VALUES LIST

Please select Option 3 of the Target List Menu and follow the screen instructions for printing the Name & Key Values List. Once printed, please study this listing also. This printout is self-explanatory apart perhaps from the following:

Product/Service Key

Unlike the other key columns which contain the full name of the currently selected key value for each prospect, the Product/Service key's column contains one or more letters A through R. This is because, unlike the other keys, the Product/Service key can have more than one value selected for each prospect at any given time. The interpretation of the letters in the Product/Service key column is given at the bottom of each page.

As can be seen above, the name & title of contact appears at the top rather than at the bottom as in the case of the familiar name & address box which appears on the screen. We could have arranged it as in the name & address box by putting the company name & address followed by:

Attn. MR BASIL DAVIS
PURCHASING MANAGER

But we feel that in today's less formal sales/marketing environment the chosen style with the contact's name & title at the top is the more appropriate. The reference data at the top of the label is made up as follows:

		0123	A	02	0099
Prospect Ref No	—	—	—	—	—
His Sales Area	—	—	—	—	—
Target Profile No	—	—	—	—	—
Shortlist Serial No	—	—	—	—	—

Sticky-label Stationery

You can if you wish print your name & address labels on the normal listing paper and then cut it up into labels afterwards. In fact, there are various machines on the market that will cut up standard size listing paper into labels, gum them and then stick them on to your mailpieces. However, these are expensive and can only be justified where your volume of mail is extremely high. As an alternative, you can buy special computer stationery which has sticky address labels ready mounted in rows across continuous form waxed paper. MARKETEEER requires stationery with 3.2 by 1 & 7/16 inch labels mounted 4 across the web with a 0.1 inch horizontal separation.

Please open the cover of your matrix printer and remove the listing paper. Then mount the special sticky label stationery in its place. Please refer to the printer's User Manual if you have any difficulty. The gauge of the sprocket holes on the special stationery may be slightly different from that of the normal listing paper. So you will probably have to adjust the width of the printer's tractor feed.

Please fit the sprocket holes of the sticky label stationery onto the tractor spikes such that the top of the print head is lined up to print on the top print line of a row of labels. The very top of the print head should in fact lie slightly above the top edge of the label. Now close the tractor clamps and check that the stationery is hanging straight and freely beneath the printer.

Some boxes of sticky label stationery have a 'leader' of waxed paper so that the printer's tractor can get a grip on the stationery with the first row of labels in the right position for printing. However, where there is no 'leader', you will have to waste the first row of labels so that enough of the stationery is resting in the tractor to allow it to grip. You can use the so-called 'wasted' row of labels in your typewriter for 'one-off' letters or parcels.

Please now select Option 4 to print the name & address labels for the prospects on the Target Shortlist you created in Chapter 13. A box appears beneath the menu asking you to load your printer with label stationery and then switch it on. Since you have just done this, please press the carriage return key. The printer will then start to print the labels. The Temporary Halt and Abort messages then appear in the box beneath the menu. These halt and abort facilities are exactly the same as described earlier for the Name & Address listing.

Once the printing has finished, you are returned automatically to the Target List Menu.

Now please press the 'Form Advance' key on the printer to throw the last of the printed labels clear. However, in the interest of economy, do NOT tear off the stationery at the next perforation as you would with normal listing paper. Instead, peel off the last two rows of printed labels and stick them on your mailpieces. Then cut the waxed paper to leave a 'two row' length of blank 'leader' for your next printout. This prevents you wasting two entire rows of labels each time you do a printout.

You will notice that the sticky label stationery is divided into 'pages' by means of horizontal perforations such that each 'page' contains 8 rows of labels. However, these 'pages' are irrelevant as far as MARKETEEER's label printing program is concerned. It deals only in 'rows' of labels: not 'pages' of labels. The only purpose of the perforations is to allow the stationery to be conveniently folded to fit in the box.

Now please switch off the printer and open its cover. Then remove the special sticky label stationery and put it away in its box. Then re-mount the ordinary listing paper and close the printer cover again and switch the printer on again. We shall now take a closer look at the labels themselves and how they can be put to good use.

The 'Header' Label

The first label of a label printout does not contain a name & address. Rather, it forms the heading of the printout as a whole, giving information concerning the Target List from which it was printed.

LABELS AND THEIR USES

We have already discussed the format of a MARKETEEER name & address label. We shall now show two examples of how they can be used to good effect.

1. Mailpieces

When sending out a mailshot, it is very helpful to the recipient if you enclose a reply-paid card for him to fill in. Such a reply-paid card could include a list of request options each with a small blank box at the side. Then, all he has to do to make his request is put a tick in the appropriate box.

If, on this same reply-paid card, you provide a sticky label containing his name and address details, he is further motivated to respond because he does not even have to fill in who he is. A suggested layout for such a reply-paid card is shown below. Your business reply address and licence number should be printed on the reverse in the Post Office standard format.

The card is the area of an A4 sheet when folded in three the way you would fold an A4 letter to put it into an envelope. The position reserved for the label is such that when the card is placed in a standard window envelope the recipient's name & address will show through the envelope's window. Thus the one label can be used both for sending the mailshot out in the first place, and for showing who returned it if and when it arrives back at your sales office. A typical reply-paid card layout is shown below:

PLEASE TICK BOX AND RETURN THIS REPLY-PAID CARD.	
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> ADDRESS LABEL </div>	<input type="radio"/> Send samples <input type="radio"/> Phone me <input type="radio"/> Call in <input type="radio"/> Invite me to Your next Demonstration

Since the label also bears the responder's reference number and sales area, you can immediately put your hands on his file and also know who (which rep) should be handling his response. The serial number of the Target Profile which produced his label tells you which Target Group of prospects the response is from. This is valuable when you have more than one mailshot active at the same time.

You could have the card produced as a one-third A4 size item on its own for enclosure with your brochure or sales letter (or both). Or you could make the card an integral part of your brochure with a perforation so that the recipient is able to fill it in and tear it off. Finally, if you enclose it with a sales letter, the name & address block on the sales letter can equally well serve as the 'show through' name & address on the out-going journey.

2. Profiled Indexes

By sticking the name & address labels on to 5 by 3 index cards and then putting them in a drawer of an index cabinet, you can provide an 'off-line' profiled card index which can be used independently of the computer.

This means that each of your sales reps can have his own personal card index covering his own group of prospects. He may even have more than one such card index. For example, he could have one arranged in alphabetic order for looking up a prospect's file number from his namecode. And he could have another arranged in postcode order for planning his visits according to the best route order without having to 'draw' a fresh listing off from the computer each time.

Also, whenever he contacts one of his prospects, he can note the date and the type of contact plus any change in his status or other key values on the back of the card. Then, at the end of the week or month, you can update MARKETEEER'S database in one grand session by going through all your prospects' card notes. Updating MARKETEEER'S database this way ensures that it is never updated impulsively thus greatly reducing the likelihood of error.

MAILSHOT/TELESALES/TELEXSHOT LISTS

Any of the up to 18 Target Shortlists which can exist (for each user in a multi-user environment) on MARKETEEER at any one time can be used to generate a Mailshot List, a Telesales Calling List and a Telexshot List. However, only one Mailshot List, Telesales Calling List and Telexshot List can exist (per user) at any one time. Each of these lists has a separate existence from the Target Shortlist from which it was generated. Therefore it continues to exist as originally generated even if the Target Shortlist from which it was derived has since been re-extracted and therefore now contains a different set of prospects.

The Mailshot, Telesales and Telexshot lists are used by MARKETEEER's Mail, Telephone and Telex subsystems to print mailshots, run telesales calling sessions and transmit telexshots. Information regarding the progress and outcome of a mailshot, telesales session and telexshot transmission is added to each respective list by the subsystem concerned and is later presented in the appropriate end-of-session report.

As an exercise, assuming that the Target Shortlist you extracted does contain some prospects, please use options 5, 6 and 7 of the Target List Menu to create a Mailshot List, a Telesales Calling List and a Telexshot Transmission List. Then press the 'Esc' key until you return to MARKETEEER's main menu and switch off your printer.

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Chapter 15: Finding Prospects

You have now had 'hands-on' experience of all MARKETEEER'S current facilities. However, this experience has been entirely with our test-database of sample prospects. In this last chapter, we give you some guidelines on how to set up your own prospects on MARKETEEER and set about using MARKETEEER to help you market and sell your products.

PREPARING YOUR OWN DATABASE

Please think of a suitable name for your own market database. The name must be not more than 8 characters long. We shall refer to it as YOURNAME. Please return to DOS and get the DOS prompt for Drive C. Now create a new MARKETEEER system of this name on your fixed disk by entering and executing the following DOS commands:

MD YOURNAME	(create new directory)
CD YOURNAME	(go into new directory)
COPYMKTR	(copy in MARKETEEER)
CD ..\EXE	(go to the EXE subdirectory)
START	(start up MARKETEEER)

You can now type-in your password and gain access to MARKETEEER's main menu. You are now running the MARKETEEER in the YOURNAME directory which is totally independent of the MARKETEEER you have been running so far.

From the main menu, please select Option 8 - Define Market. Then, when the Market Definition Menu appears, please select Option 9 - 'Clear the Database'. Full instructions now appear on the screen. Notice you have to type-in the entire instruction 'CLEAR THE DATABASE' (in capitals) rather than simply typing an option number or short command word. Furthermore, you have to type it perfectly in one go. No correction facilities are provided. There is good reason for this. It is to ensure that nobody can activate this facility impulsively. Imagine the consequences if you were to clear the database in the wrong Disk Directory.

Please type-in the command 'CLEAR THE DATA BASE'. The operation of clearing the database only takes an instant. This is because the actual data itself is not cleared: the 'number of occupied records' is simply set to zero, thus telling MARKETEEER in effect that all records are now spare and therefore can be assigned to new prospects. As new prospects are entered, therefore, their details are simply recorded 'over' the old data.

But why not simply transfer MARKETEEER'S programs into the new directory without the existing data files and let it to build up its own data files as you enter your prospect details?

The answer is that MARKETEEER requires primed data files in order to work. It will not create a database from scratch without the 'empty' database files present. Furthermore, setting up a new directory in the way described ensures that as your database fills up, the data becomes arranged contiguously on the disk thus allowing MARKETEEER to operate in its most efficient - and therefore fastest possible - way.

Building up your database dynamically from scratch in a brand new blank directory would tend to make MARKETEEER more sluggish in its general sorting processes and in getting data to and from the disk.

SOURCES OF DATA

Having now prepared a clear database in which to build your new prospect data, where do you go to obtain some actual names and addresses of real prospects? Naturally, if you are already running an established sales-based organization, you will have plenty of these already available on your old 'manual' files. However, if you are just starting up, or wish to expand your existing list, here are a few sources to consider:

1. Yellow Pages

The British Telecom Yellow Pages is always a good place to start compiling a new list of prospects. Because it is a ready-classified list, you know what type of business each subscriber is in. You can therefore select only those types of businesses which are likely to need the products you are selling.

However, Yellow Pages only gives you the name, address, telephone number and type of business. It does not give you a name & title of contact or any of the other pieces of information you are likely to need. You will therefore have to supplement this by telephoning each company to try and find out the various other pieces of information for yourself. Yellow Pages research is the cheapest way of compiling a prospect base. It requires only your own time.

A disadvantage of Yellow Pages is that the volume supplied to you as a subscriber covers only your local telephone area. You have to buy volumes covering other parts of the country or look at them in your local reference library (in which they are often out of date).

2. Trade Directories

Many industry and trade associations publish directories of their member companies. These have the advantage of allowing you to acquire directories of only those trades or industries in which you are interested, and above all, each one gives you NATIONAL coverage for the trade or industry concerned.

An exhaustive list of trade directories is given in the 'Source of Sources' to be mentioned later. However, one such trade-classified directory which is reputed to include pretty well everybody is:

DIAL INDUSTRY
IPC Business Press Information Services Ltd
Windsor Court
East Grinstead
West Sussex RH19 1XA
tel: 0342-26972

3. List Brokers

There are companies who specialise in researching and compiling lists of people and companies for various purposes. These lists are for sale and it is likely that at least one such list will form an ideal starting point for you to build up your base of active prospects. They give you the basic details for each prospect.

Of course, different list-broking companies specialise in different types of lists. However, practically all these companies are themselves listed and reviewed in booklets produced by:

British Direct Mail Marketing Assoc'n
1 New Oxford Street, London WC1A 1NQ
tel: 01-242-2254

The Direct Mail Producers Association
34 Grand Avenue, London N10 3BP
Tel: 01-883-7229

4. Telesales Companies

Many companies are now springing up which specialise in selling by telephone. One of the services they offer is that of acquiring a workable list of interested prospects for you at a certain cost per 'decision maker contact' (DMC).

The way they work is to search out and speak by telephone to the relevant purchasing decision maker within each prospect company. Then they furnish you with the list of contacted decision makers. The resulting list is usually better targeted than lists from other sources because the contacts have actually been spoken to on your behalf. But they are naturally more expensive.

5. Advertising & Press Releases

Another obvious option is to advertise and then build up your prospect list from those who respond. This ensures that those who get on the list have a positive interest to start with. This kind of response can also be obtained from editorial and reviews in appropriate trade journals. Such editorial is free of charge at the discretion of the Editor concerned. All you need do is send a Press Release to each appropriate journal.

6. A Source Of Sources

There are many more sources from which to start or expand your prospect database. A good overall 'Source of Sources' is a small booklet produced by the Post Office called 'DIRECT MAIL LIST BUILDING' by Allan Dale.

This booklet - along with many other helpful booklets to do with direct mail marketing - is available from any Head Post Office or from:

The Post Office
Direct Mail Section
Marketing Department
Postal HQ
St Martins le Grand
London EC1A 1HQ
Tel: 01-432-4861

INITIAL INPUT

When you have acquired your initial base of prospects to put on MARKETEEER, you will have to 'key' (type) them all in via the computer's keyboard using Main Option 1. This will probably take you some time, but it has to be done. After you have entered all the name & address details, you will then have to scan through each prospect record again using Main Option 1 and type-in the appropriate key values.

This latter task will probably take even longer. This is because the assignment of the most appropriate value for each key for any given prospect involves a value judgement and a decision. In fact, you may not be able to assign a meaningful key value in every case to begin with. You will probably have to wait until you have had an opportunity to learn more about the prospect through subsequent contacts.

LISTS SUPPLIED ON DISK

Some list broking organizations now supply lists on floppy disks which are much easier to deal with since all the name & address details on them do not need re-typing.

To transfer names and addresses from such disks into MARKETEEER's database, you use the Import Option in the Configuration Menu. However, the format of the information on the disks supplied must be in either 'comma delimited' format or CR or CR/LF delimited format, and the number and order of fields per name & address record must be known. A reasonable degree of 'computer literacy' is needed to be able to use the Import Option.

RECORDS LISTING

Once you have completed the input of your initial base of prospects, it is useful to have MARKETEEER produce a Records Listing of the complete database. Use Option 2 of the Main Menu to create a Target Profile with no restrictions at all, EXTRACT a 'Shortlist', and then use Option 2 of the Target List Menu to print the name & address list.

This list contains the REF number of each prospect. Therefore, if any of the prospects on the list came from your old records, you can now put their respective correspondence and other paperwork into the appropriate numbered drop files in the filing cabinet.

THE SHAPE OF YOUR MARKET

With a reasonable number of prospects now on file, this is probably a good time to look at how your overall market is taking shape, that is, what proportions of what types of prospects currently make up your market and how they are distributed. This you can do by having MARKETEEER produce a printout of the Market Statistics using Main Menu Option 7 as described in Chapter 6.

TIME FOR ACTION!

With a good listing of your prospects in front of you, and a good idea as to the shape of your market, you are now in a position to make contact with your market through a targeted mailshot or a telesales campaign - or even by electronic mail or Telex if you know that the prospects are suitably equipped.

Targeting Your Campaign

From the information given in the Market Statistics report, please decide on the type of prospect you wish to aim at with your first exercise using MARKETEEER. Then define his profile in terms of the values of the various keys as described in Chapter 13. Then set up that profile as your target using Main Menu Option 2.

Mail Pieces

Now prepare your mail pieces. Perhaps you would like to have a special brochure or piece of sales literature produced for this purpose. Then, if appropriate, print off a targeted set of name & address labels for the envelopes or reply-paid cards.

Sales Letters

Check over the wording of the sales letter you composed during your study of Chapter 7. As some time has passed since you wrote it, you will probably see a few improvements you could make to your original effort. When you are finally satisfied with the text, print off your targeted batch of sales letters ready for mailing.

Telephone Calls

You may decide to follow up your sales letters with telephone calls, or you could follow the 'telesales' formula of telephoning first to determine to whom you should send your mailshot. Use Main Menu Option 5 as described in Chapter 9 to feed you the details of each prospect within your target group in turn and dial them automatically from the telephone number held in the respective prospect record.

As you speak with each prospect, please take notes and try to finish up with an appointment date. After some practice, it is a good idea to design a special questionnaire for yourself (or whoever you assign to do your telephoning) so that there is eventually some consistency to the information you take down when on the telephone. Once you have made all your telephone calls, update MARKETEEER'S key values as appropriate for the prospects concerned and put in the appointment date as a future 'date of Next Event'.

If you are slow at taking notes over the phone and it distracts you from your conversation, you could attach a voice recorder to your line and record the conversations for later scrutiny and note extraction. It is useful to have the recorder operated by a foot pedal to leave your hands free for the computer keyboard and for writing things down.

Prospect Files

Always file the questionnaires and notes taken during your telephone calls. Put them in the appropriate prospects' drop files in the filing cabinet. Do the same for returned reply-paid cards and general response mail. In this way, you will gradually build up a good working dossier on each prospect showing the history of your relationship with him.

GETTING ON THE ROAD

By setting up a suitable second target profile, you can now ask MARKETEEER to print a Records Listing in postcode order for those prospects with whom you managed to make an appointment. With the aid of this list you can easily plan your road route on the appropriate postcode area maps. If your operation is nationwide, you can with the careful dating of appointments plan a very efficient staged sales trip spanning many days.

Every time you return from a sales trip, update the key values of each prospect you have visited to reflect the progress you have made with them during your trip. Also, please place any notes you have taken during your trip (including transcripts of memo tapes) into the respective prospects' drop files.

CUSTOMER CONVERSIONS

Eventually you will get orders. The prospects concerned will thus have been 'converted' into customers. You can then draw off a Records Listing of customers for your accounts people to put on the sales ledger or sales order processing system, or alternatively you can transmit the details of your new customers directly to your accounts department's computer via the Export Option in the Configuration Menu. NOTE: A reasonable degree of 'computer literacy' is needed to use this facility.

MORE PROSPECTS

As time progresses, you will find other prospects whose details you should enter onto MARKETEEER as and when they become known.

But please bear in mind also that the time must come when you should think of deleting those prospects who, after much time and effort, are showing no progress. This way you ensure that MARKETEEER'S database does not become choked with 'dead wood' and remains truly a base of currently ACTIVE prospects.

CHANGING KEY VALUES

After a time, you may decide that some of your key values should be re-named. This you can do at any time using Main Menu Option 8. But please be careful. A new name will be applied to the same respective key value position for all prospects both new and old. Thus if you re-name the value 'CUSTOMER' of the Relation Key to 'CLIENT', then all previously entered prospects who were designated 'CUSTOMERS' will now be called 'CLIENTS': not just the ones you had in mind when you decided to change the name.

IT'S OVER TO YOU

Throughout this book, as each facility has been described, we have made many suggestions on how to use each one effectively. We hope that coupled with your own detailed knowledge and experience of your particular field, these suggestions may help you to apply MARKETEEER in the way most beneficial to your endeavours. Good luck and good marketing!

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Eastern Business Systems "Marketeer": User Manual

Software Licence Agreement**Definitions**

The first person forms (I, me, my etc) refer exclusively to Mr Robert John Morton (whose official postal address is made available to those who become a party to this licence agreement). The second person forms (you, your, etc) refer to the party to whom I grant the licence herein defined.

Words in *emphasized* type have the following meanings:

The *software* is the executable computer code, associated fixed data, screen designs and report designs which make up the intellectual property to which this licence applies.

The *text* is the text and graphic design of the User Manual and other documentation pertaining to the *software*.

The *fee* is the previously-agreed amount of money you must pay me in return for my granting you this licence.

The *computer* is a single computer installation on which, having paid the appropriate *fee*, you are entitled to use the *software* under this licence agreement.

The *material* is the physical media upon or within which the *software* and *text* are borne.

The *design* is the layout and graphic design of the screen displays and printouts produced by the *software*, and illustrations within the *text*.

The *method* is the way in which the *software* performs its functions, and the way of applying those functions as described in the *text*.

The *package* is the *software* and *text* plus the *material*.

A *derivative* is any software or text which embodies any design or method which is derived from the *software* or *text*.

A *copy* is one recording of the *software* or the *text*.

The *active copy* is a *copy* from which the *computer* can read parts into its immediate memory for the purpose of execution.

A *backup* is a copy of your data as generated by the *software* which you make and hold for safekeeping.

Conditions

Below are the conditions, as interpreted under the laws of England, upon which I grant you licence to use the *package* for the purpose for which it is designed. The licence is automatically terminated if you breach any of them.

1. You become licensed to use the *package* on one *computer* when I have received cleared funds equal to the amount of the *fee*. Prior to this, you have no authority to use the *package*, and I have no obligations or liabilities in connection with your (or anybody else's) use of the *package*. If a cheque received by me for the *fee* has not cleared within 5 days of supply, you are obliged to return the *package* to me by recorded delivery mail.

2. When I have received the *fee*, I will issue you with a non-zero licence number which, together with your name, will be made to be displayed by the *software*. Prior to installation of your licence number, the *software* will have a limited life. You may not transfer your licence to another party without my written agreement. I will support the *software* from the date you become licensed for as long as the *computer* for which it was originally provided remains current technology.
3. You acknowledge the *design*, *method* and Copyright of the *software* and *text* to be my exclusive property. You shall not make available a *copy* or a *derivative* to another party. You may however make *copies* for the sole purpose of regenerating your original *active copy* in case your original *active copy* becomes corrupted.
4. I reserve the right to make changes to the *software* and the *text* without notice and you accept that the way the *software* operates on your *computer* may differ from that described in the supplied version of the *text*, but that any such difference will not reduce the performance or functionality of the *software*.
5. I gratefully accept suggestions for improving the *software* or the *text* on the understanding that the suggester has no claim to any suggestion which becomes incorporated into the *software* or the *text*.
6. *software* means that its operation embraces an astronomical number of possible circumstances which is beyond the bounds of finite engineering resources to test fully. So although the *software* will perform correctly all the functions for which it was designed most of the time, it is possible that it may malfunction in circumstances which were not foreseen. You therefore accept that errors may exist in the *software*, and that although I shall be under no obligation to correct such errors, I will be most grateful to you for pointing them out and will try to correct them as soon as possible.
7. To work properly, the *software* relies on the correct operation of the compiler on which it is compiled, the *computer* on which it runs, the operating system and network software through which it accesses computing resources, and any other items of equipment and software it uses. These items are produced and sold by other parties over whom and over whose products I have no control or influence. A fault in any of these items can make the *software* appear to be at fault when it is not. I therefore accept no liability for apparent malfunctions of the *software* resulting from faults in these items or where these items are not performing in every respect according with their published specifications.
8. Loss or corruption of data you have entered using the *software* can result from causes other than software malfunctions. Examples are: power cuts, equipment malfunctions, operating system errors and faulty recording media. I expect you to protect your data by making *backups* often enough to ensure that the cost of re-entering the data lost since the last fault-free *backup* was made is small enough for you reasonably to bear. For this and other reasons, I accept no liability for consequential losses resulting from use of the *software*.
9. You accept that errors and omissions may exist in the *text* and that although I shall be under no obligation to correct them, I will be most grateful to you for pointing them out, and will try to correct them as soon as possible.
10. The *material* remains my property. I lend it to you at no cost to you from the time I receive the appropriate *fee* to the time this licence expires or is revoked. It is lent to you solely for the purpose of conveying the *software* and *text* to you initially. If the *material* fails in this purpose, then I will replace it.

11. Your sole remedies and my entire liabilities are as set out above. I will not be liable to you or to any other party for any losses, damages or expenses arising out of the use or inability to use the *package*. Notwithstanding the provision of any of the foregoing conditions, my liability in damages in any event where the law demands shall be limited to the amount of the licence *fee* received by me.

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