



## Marketing Metrics Reporting

### Overview

Starting in March 2022, we will begin collecting marketing spend metrics from our franchise partners. This should be reported by each franchise location in OPUS by the 5<sup>th</sup> of each month. By implementing this reporting procedure, we aim to gain insight on where more marketing support and resources should be provided.

### Benefits of Reporting Your Marketing Metrics

The purpose of the "Marketing" tab in OPUS is to enable franchisees to be able to confirm their marketing spend on a monthly basis. The marketing spend amount, date of the marketing spend, and the description of what the marketing spend pertains to, are all able to be entered and viewed with ease. There are several benefits to using the "Marketing" tab:

- allows the home office to see where more support should be focused.
- allows you as the franchisee to enter and track your marketing spend and efforts on a monthly basis.
- allows you to see where you're putting the majority of your marketing dollars and help you diversify your campaigns.
- provides insight to enable the home office to be able to determine what marketing materials may need to be created.

### How to Submit the Report

To report your monthly marketing metrics in OPUS, navigate to the "Marketing" tab, by clicking on the "Marketing" tab between the "Operations" tab and the "Admin" tab. By default, the "Marketing" subtab will be displayed. Here is where added marketing spend entries, broken down by month, will be displayed.

To add a marketing spend entry, click on "Add". Next, click on the box next to "Month" to choose the month, day and year of the marketing spend entry. Then, click on the box next to "Description" and choose the appropriate option depending on the nature of the marketing spend entry you are adding. The options for description are Print Advertising, Events and Community Outreach, Digital Advertising (Social media, Google ads), Email Marketing, Radio/Television, and Other. Lastly, you add the amount of the marketing spend entry and then you click "Save".

You will then be brought back to the first page of the "Marketing" subtab and it is here that you will see your added entry in its own month category. For example, should you add an entry with a date of June 2021, you will see a new month category appear titled "June-2021". You then click on "View" on the

right of this row in order to view the entries added for this month with the date, Description, and the Amount Spend listed.

### **Adding Supporting Documents**

To find where to add supporting documents, navigate to the "Marketing" tab and then click on the subtab titled "Support Documents". The "Support Documents" subtab is where franchisees can add support documents that pertain to their marketing spend entries.

To add a support document, you click on "Add". Then, click on the box next to "Description" and type a description of the support document you are wanting to add. Next, click on "Choose File" next to where it states "File" to browse for a file to add from your computer. After that, click on "Save". You will now see the support document has been added.

You can view an image of the support document you have added by clicking on the image of the support document under the column that states "File". To see the description of the support document, you may view the description under the column that states "Description". You can edit the description of the support document you have added by clicking on "Edit" on the right of the row of the support document. After clicking on "Edit", you are able to edit the description of the support document accordingly. Once you have edited the description, click on "Save".

**[Watch the "how to" video](#)**