

# Job Aid: Create a Sales Event and Submit for Approval

Assign to: FSRs and NBDRs

**Purpose:** To create a Sales Event in Salesforce, and Submit for Approval.

## Create a Sales Event Record

1. Click on the Campaigns tab on the Navigation Menu.
2. Click on the New button in the upper right-hand corner on the Record Controls Menu to launch the record creation form.

Sandbox: UAT

All Search Campaigns and more...

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Campaigns Recently Viewed 7 items • Updated a few seconds ago

Search this list...

Campaign Name	Parent Campaign	Type	Status	Start Date	End Date	Responses in ...	Owner Alias
1 Hilton Seminar			New	1/21/2020		6	JGARR
2 2020 Sales Kit		Advertisement	Planned	1/13/2020	1/1/2099	0	dapps
3 San Antonio, Dallas - Ft With TC Comp Brochure	2020 Sales Kit	Sales Kit	In Progress	5/20/2019	12/31/2022	0	dapps
4 Church Junction			Submitted	1/28/2020		6	mholm
5 Main St Hilton Seminar			Submitted	1/15/2020		2	JGARR
6 Church Junction			Completed	1/10/2020		60	JGARR
7 Formal Sales Seminar			Approved	6/3/2020		0	cwhee

3. Fill out the required details to create a new record and click Save. Required fields are marked by a red asterisk
4. Add a Campaign Name
5. Select the Event Type
  - a. Informal
  - b. Educational
  - c. Seminar
6. Add the Product to be discussed in the Contract Name
  - a. This is a search able field type
  - b. Type in the Name and select from the list or hit enter to navigate to the search page
7. Select the Region, Market, and Micromarket for the drop options



## New Campaign: Sales Event

### Campaign Information

\* Campaign Name

Test Sales Event

Campaign Owner

External Broker Cigna Test

\* Event Type

Seminar

Campaign Record Type

Sales Event

[View all dependencies](#)

Active

\* Region

EAST

[View all dependencies](#)

\* MCE ID

Y0036

\* Market

Alabama

[View all dependencies](#)

\* Contract Name

2020\_AL\_H4513\_045\_Advantage (HMO)

\* Micromarket

Birmingham

[View all dependencies](#)

8. Add your name as the Agent
9. Add your NPN
10. Add your Agent Writing ID
11. Select 'Yes' in the Qualified Agent drop down

Campaign ID

Project Code

DNIS

BSR Manager

Search People...

Agent BSR

Search People...

Provider

Search Providers...

\* Agent

James Test External Broker

\* NPN

22222

\* Agent Writing ID

234567

\* Qualified Agent?

Yes

[View all dependencies](#)

End Date



12. Enter the Event Information

- a. Start Date
- b. Event Time
- c. Estimated Attendance
- d. Presentation Language

Event Information

\* Start Date  
2/19/2020

\* Event Time  
2:00 PM

Description

\* Estimated Attendance  
500

\* Presentation Language  
English

Presentation Language if Other

Facility Type

Accommodations  
--None--

13. Capture the Venue Information

- a. Venue Address 1
- b. Venue City
- c. Venue State
- d. Venue Zip Code

Venue Information

Venue Name

Venue Capacity

Venue Phone

Event Contact

Contact Phone

\* Venue Address1  
123 Venue Address

Venue Address2

\* Venue City  
Birmingham

\* Venue State  
AL

\* Venue Zip Code  
35005

## 14. Click Save

### Scheduling Information

Reschedule?

Date Rescheduled



Status

Cancellation Date



Cancellation Reason

Cancellation Reason Other

### Post Event Information

Actual Attendance

Gifts/Activities Offered

[View all dependencies](#)

Gifts Offered Compliant

[View all dependencies](#)

Cost of Gifts/Activities

Food/Beverages Offered

[View all dependencies](#)

Food/ Beverages Offered Compliant

[View all dependencies](#)

Cost of Food/Beverages

Cancel

Save & New

Save

## Submit a Sales Event for Approval

1. Click on the Campaigns tab in the Navigation Menu.
2. Click on the Campaign you want to access to view the Campaign record page.
3. Click the Submit for Approval button in the Records Control Menu on the Campaign record.

The screenshot shows the Salesforce interface for a campaign record. The campaign name is "2017 Lock In Digital Dre". The record type is "Sales Event", status is "Planned", start date is "8/10/2019", and end date is "10/10/2019". In the top right corner, a dropdown menu is open, showing the "Submit for Approval" button circled in yellow. Below the record details, there is a "Related" section with a "Campaign Members" chart showing 2 members. To the right is an "Activity" section with filters and a "More Steps" button.

4. Enter any relevant comments to the Approval Process and click Save.

The screenshot shows the "Submit for Approval" dialog box overlaid on the campaign record page. The dialog has a title bar "Submit for Approval" and a "Comments" section with a text area. At the bottom right of the dialog, the "Submit" button is circled in yellow, and the "Cancel" button is also visible.

## Sales Event Approval Process

Each Sales Events that is submitted will need to be approved. Event status will update accordingly to the following conditions:

- New: when agent creates new sales event
- Submitted: when agent has saves new sales event and submitted for Manager approval
- Approved: when Manager approves sales event
- Rejected: when Manager rejects sales event
- Completed: when agent completes required fields in 'Post Event Information' section on sales event

## Update Event Information

Update post-event information including Actual Attendance, Gift/Activities and Food/Beverages offered within two business days after conducting an event where the Formal Sales Presentation is utilized. In addition, agents are responsible to submit educational event Gift/Activities and Food/Beverage via Salesforce by the 15<sup>th</sup> of the month prior to the month of the event.

1. Access the Sales Event record.
2. On the Details List scroll down to the Post Event Information.
3. Click on the edit pencil icon next to the field to edit.

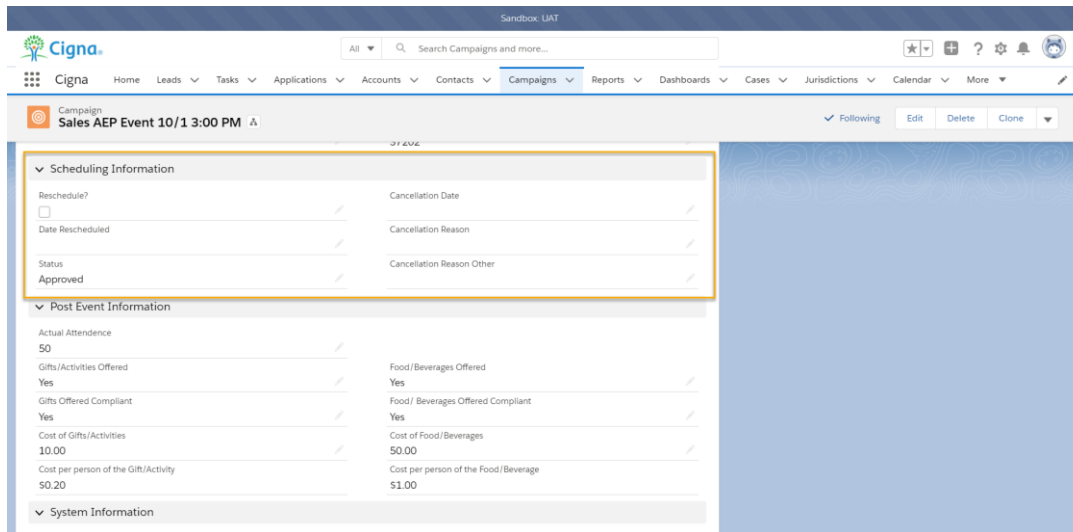
The screenshot displays the Salesforce interface for a campaign record titled "Sales AEP Event 10/1 3:00 PM". The "Post Event Information" section is highlighted with a yellow border. The fields in this section are as follows:

Field	Value
Actual Attendance	50
Gifts/Activities Offered	Yes
Gifts Offered Compliant	Yes
Cost of Gifts/Activities	10.00
Cost per person of the Gift/Activity	50.20
Food/Beverages Offered	Yes
Food/ Beverages Offered Compliant	Yes
Cost of Food/Beverages	50.00
Cost per person of the Food/Beverage	\$1.00

## Re-Schedule and/or Cancel a Sales Event

If re-scheduling/cancellations occur, the agent must update their Sales Event in Salesforce following the below steps. Agents must also notify their Sales Manager prior to rescheduling the Sales Event

1. Navigate to the Sales Event
2. On the Details List scroll down to the Scheduling information section.
3. Click the edit pencil icon next to the field to edit.
  - a. If re-scheduling check the box and update the rescheduled date
  - b. If canceling enter the cancelation date and select the reason
4. Save the edits to apply.

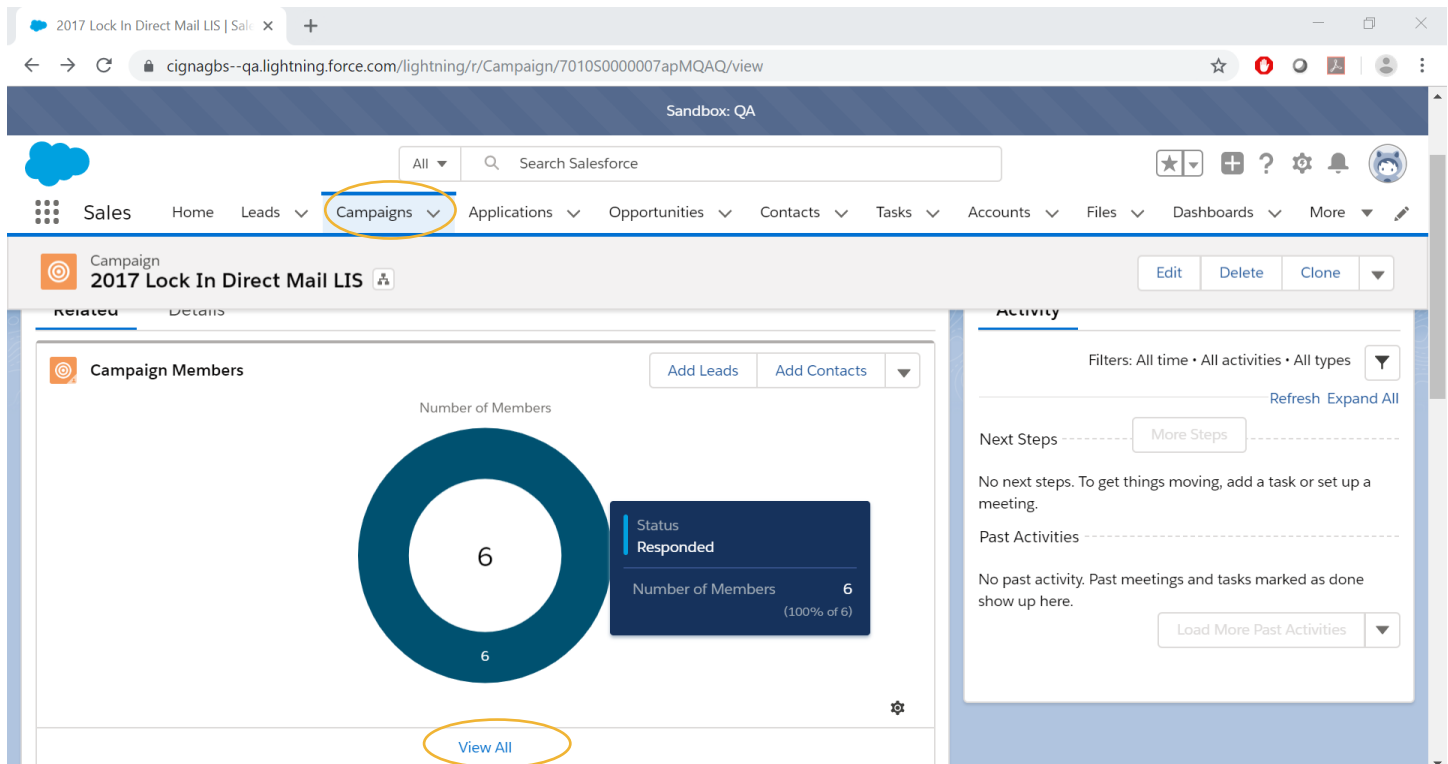


## Track and Capture RSVPs for Sales Event

After creating a sales event (must be type=seminar), the agent can add leads and manage RSVPs on the RSVP related list.

To change a RSVP from Responded to Attended (or vice versa):

1. Click on the Campaigns tab in the Navigation Menu.
2. Click on the Campaign you want to access to view the Campaign record page.
3. Click on the Related tab on the Related/Details component.
4. Scroll down to the Campaign Members component and click View All.



Campaign Members | Salesforce x +

cignagbs--qa.lightning.force.com/lightning/r/70105000007apMQAQ/related/CampaignMembers/view

Sandbox: QA

All Search Salesforce

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Campaigns > 2017 Lock In Direct Mail LIS  
**Campaign Members** Add Leads Add Contacts Update Status

6 items - Sorted by Last Modified Date - Updated a few seconds ago

	TYPE	FIRST NAME	LAST NAME	PHONE	EMAIL	SIGN LANGU...	FOREIGN LA...	HANDICAP A...
1	Lead	Tom	Smitho					
2	Lead	Thelma	Holmes	(863) 372-1349				
3	Lead	Jessie	Tuopo					
4	Lead	Tom	Smith	(000) 999-8888				
5	Lead	Bob	Martin					
6	Lead	Jessica	Nestor	(555) 555-5555				

5. Check the Contacts or Leads to update and click on the Update Status button.

Campaign Members | Salesforce x +

cignagbs--qa.lightning.force.com/lightning/r/701050000007apMQAQ/related/CampaignMembers/view

Sandbox: QA

All Search Salesforce

Sales Home Leads Campaigns Applications Opportunities Contacts Tasks Accounts Files Dashboards More

Campaigns > 2017 Lock In Direct Mail LIS  
**Campaign Members** Add Leads Add Contacts Update Status

2 items selected

	TYPE	FIRST NAME	LAST NAME	PHONE	EMAIL	SIGN LANGU...	FOREIGN LA...	HANDICAP A...
1	<input checked="" type="checkbox"/> Lead	Tom	Smitho					
2	<input checked="" type="checkbox"/> Lead	Thelma	Holmes	(863) 372-1349				
3	<input type="checkbox"/> Lead	Jessie	Tuopo					
4	<input type="checkbox"/> Lead	Tom	Smith	(000) 999-8888				
5	<input type="checkbox"/> Lead	Bob	Martin					
6	<input type="checkbox"/> Lead	Jessica	Nestor	(555) 555-5555				



## 6. Select the desired Status and click Save.

The screenshot shows the Salesforce Campaign Members interface. A modal dialog titled "Update Member Status" is open, displaying "2 campaign members selected". Below this, there is a dropdown menu for "Member Status" with "Responded" selected. The "Save" button is highlighted with a red circle. In the background, a table of campaign members is visible with columns for "TYPE" and "FIRST NAME".

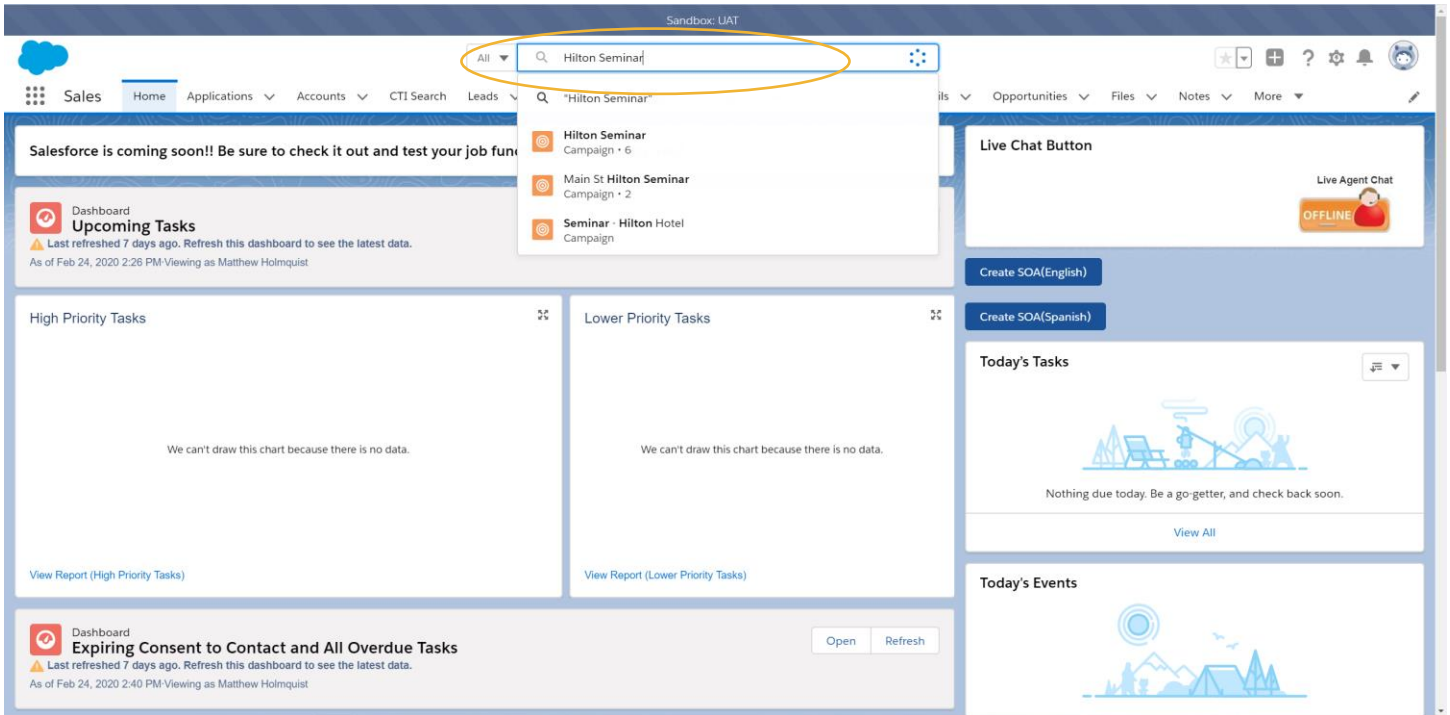
	TYPE	FIRST NAME
1	<input checked="" type="checkbox"/> Lead	Tom
2	<input checked="" type="checkbox"/> Lead	Thelma
3	<input type="checkbox"/> Lead	Jessie
4	<input type="checkbox"/> Lead	Tom
5	<input type="checkbox"/> Lead	Bob
6	<input type="checkbox"/> Lead	Jessica

## Manager Approval of a Sales Event

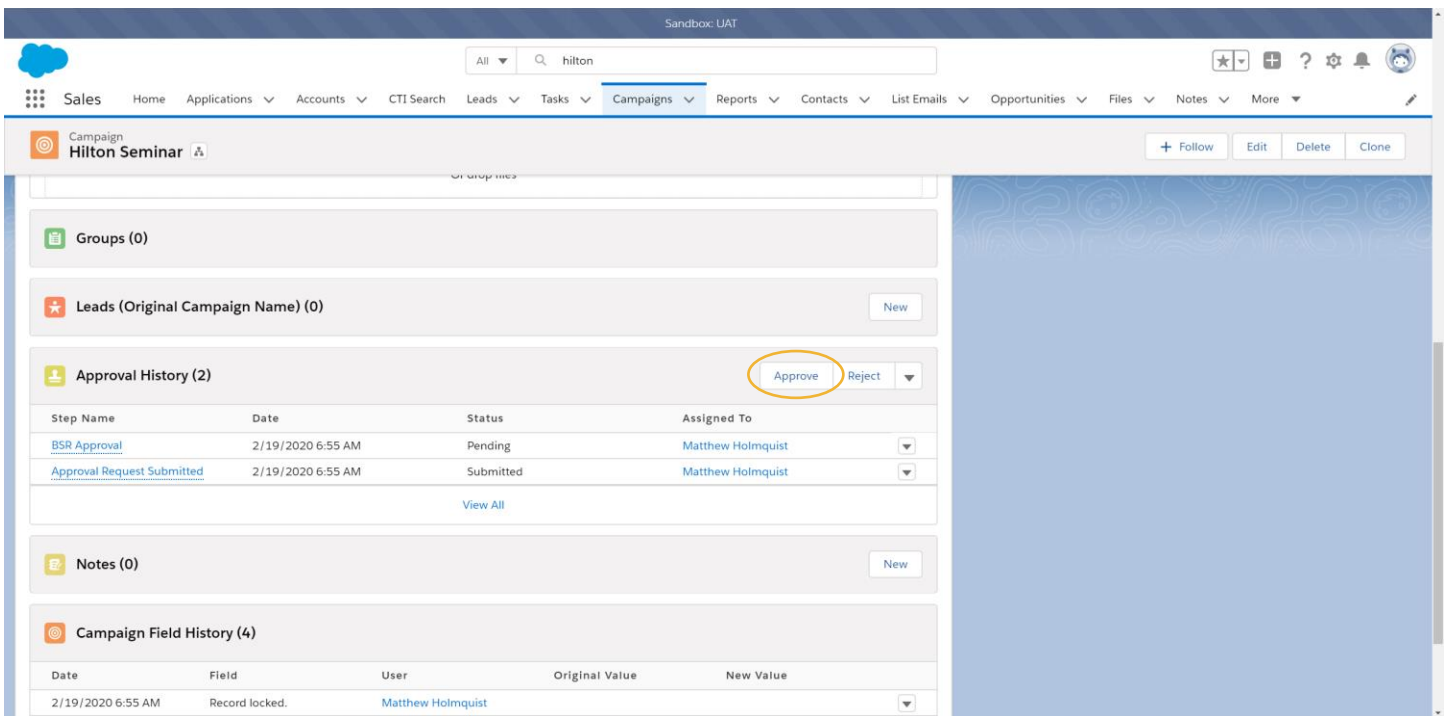
### 1. Manager receives an email notification that action is required to approve the Sales Event.

**Cigna.**  
Dear Matthew Holmquist,  
Date :2/19/2020  
I have created a new event within Salesforce, cancelled an event, or made changes to an event (i.e. change of agent/broker). These changes require your review and approval in order to move the event to an active or cancelled event status.  
Agent conducting Event: Matthew& Holmquist  
Event Name: Hilton Seminar  
Date/time: 1/21/2020 and 4:00 PM  
Location: 201 Secret St. , Chicago, IL, 60619  
All marketing/sales event and necessary educational event information should be entered into Salesforce by the agent/broker and approved by the agent's/broker's Field Sales Manager/Broker Sales Representative prior to the 15th of the month for the following month's events. If a new event is submitted to C-HS after the 15th of the prior month, the event should be entered by the agent/broker and approved in Salesforce by the Field Sales Manager/Broker Sales Representative at least ten (10) calendar days prior to the event.  
Event cancellations are required to be updated by the agent/broker in Salesforce at least forty-eight (48) hours prior to the event (i.e., two (2) calendar days including Saturday and Sunday).  
Within one (1) business day of the event change or cancellation, the Field Sales Manager/Broker Sales Representative will need to review the changes or cancellation in Salesforce and approve these updates so Compliance can be notified accordingly.  
If an event is cancelled less than forty-eight (48) hours prior to the event start time, the agent/broker or plan representative is required to remain at the venue for at least fifteen (15) minutes after the scheduled start time for potential customers that may show up.  
If the scheduled agent/broker or plan representative is unavailable on the scheduled date of the marketing/sales or educational event, the Sales market lead or responsible relationship manager names a back-up qualified agent/broker or plan representative to conduct the marketing/sales or educational event. The agent/broker or manager will need to update the event in Salesforce to reflect the updated back-up agent/broker or plan representative conducting the event.  
In the event of inclement weather, the agent/broker or plan representative is not required to go to the venue. The agent/broker or plan representative informs Sales Support at [SalesEvents@healthspring.com](mailto:SalesEvents@healthspring.com) and their local Sales contact who notifies Compliance.  
To approve/reject this event, log into your Salesforce account, to review details regarding the Sales Event.  
As a reminder, without your approval this event will not be considered an official active, updated or cancelled event  
Thank you,  
Matthew& Holmquist  
This message is intended for Agent/Broker intent, please do not forward this email notification to the customer.  
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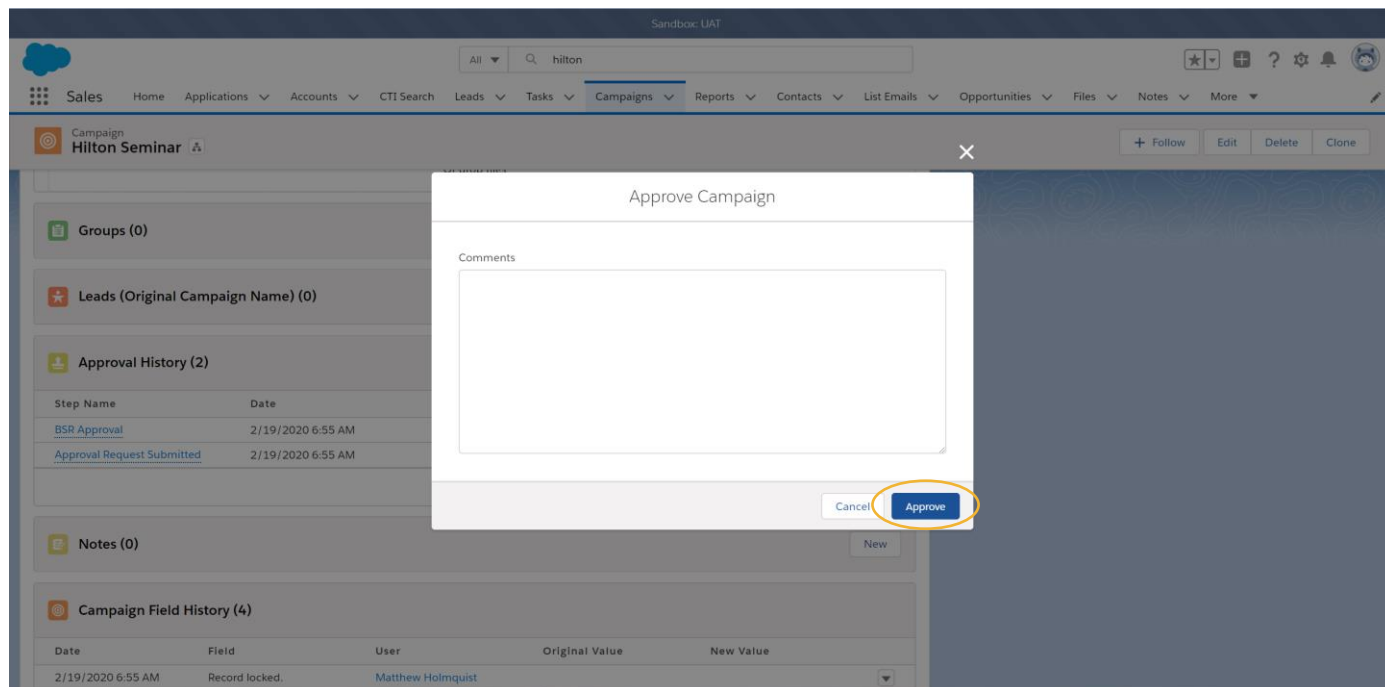
- Search the Name of the Sales Event using the Global Search function or access the record through the Campaign Tab on the Navigation menu.



- On the Related Tab Scroll down to the Approval History Component.
- Click Approve to Approve the Sales Event.



5. Add notes if desired to the Approve Campaign form and click Approve.



Together, all the way.®