Podcast Script: Targets

Welcome to this 60 second Sugar snippet. My name is Susie Williams. Today we’re going to talk about targets—what they are, and how to use them in campaigns.

As the Sugar manual says, a target is an individual that you have some information on but who does not qualify as a lead or a contact. Targets, also called “Prospects”, are standalone records that are not attached to leads, contacts or opportunities. Think of them as a precursor to a lead.

Targets are used in the Campaign area of Sugar. The usual process is to import or create a target list first, then associate it with a set of targets, then associate that target list with your campaign. You can import a target list from within Sugar by selecting the Import Targets shortcut when you are in the Campaigns area of the product. The import tool allows you to import a comma-delimited, tab-delimited, or custom-delimited file.

A target only needs to have a last name, but for practical purposes, you’ll want to include an email address if you’re going to use this target in an email campaign.

You can see all of the campaigns that have been sent to a target by going to its detail page, as well as whether your message was viewed by that target (if it was an email campaign).

When you’re ready to convert that target into a lead, it’s as easy as clicking the “Convert to Lead” button on the Target form. You’ll have a chance to fill in some additional information if you’d like before saving the lead record.

Targets allow your Marketing department to populate the pipeline with more qualified leads, which will make your sales people very happy.

And that’s your 60 second Sugar snippet. Goodbye!