IQ Audience Builder

General Information

Audience Builder General Description and Uses

The Audience Builder provides the capability to easily build a list based on including or excluding Contacts for your audience, using a wide range of criteria, such as geographic data, affiliation codes, voting history, interactions with your office, and more. The resulting audience can then either be used for constituent communications options within IQ or can be exported for use outside of IQ.

Once a Contacts audience is built, some common actions include:

- create and send an eNewsletter or 499 Mailing to the target audience;

- export the audience list for email address scrubbing services; or

- share the audience list with other staff.

Creating a new Audience

Creating a new Audience is simple:

1. From the Contacts big menu, select **New > Audience Builder**.
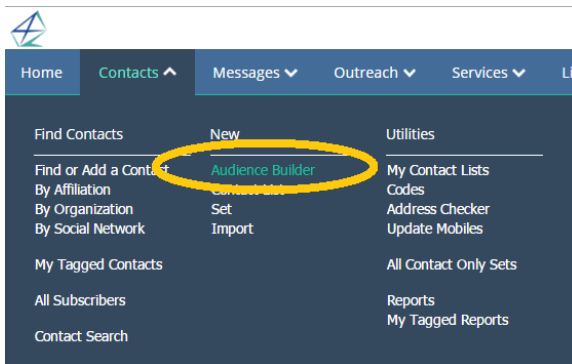
2. Enter a descriptive **Title**.

3. Define the audience criteria. Press the **+** beside the section header to define options within that category.

4. Press **Save & View List** to see your results. Optionally, press **List Size** to get a count before leaving the page.

5. From the list of Contacts in the audience, click the **gear** icon and select **Modify Search Criteria** to return to the audience definition.
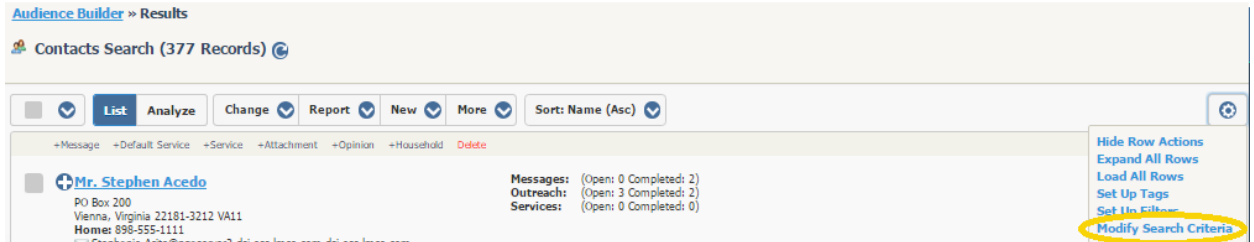
Defining the Audience

Audience Builder Basic Steps

On the Audience Builder definition page:

1. choose the appropriate **Start With** option,
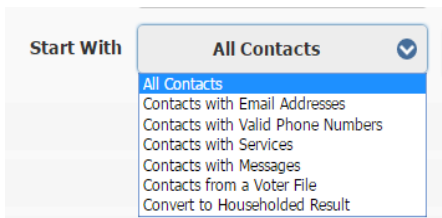

a. The "All Contacts" option applies the defined audience criteria to all Contacts in IQ.

b. The "Contacts with Email Addresses" option applies the defined criteria only to Contacts having an active email address.

c. The "Contacts with Valid Phone Numbers" option applies the defined criteria only to Contacts who have a valid, 10-digit phone number.

d. The "Contacts with Services" option applies the defined criteria only to Contacts who have one or more Service records.

e. The "Contacts with Messages" option applies the defined criteria only to Contacts who have one or more Message records.

f. The "Contacts from a Voter File" option applies the defined criteria only to Contacts who have had voter data imported.

g. The "Convert to Householded Result" option applies the defined criteria only to Contacts who are identified as the Head of Household, when anyone in the household meets the search criteria.

Note that in the Audience Characteristics section, the **Apply To** options also impact this setting:

- "All" is the default setting which will apply the criteria to all records.

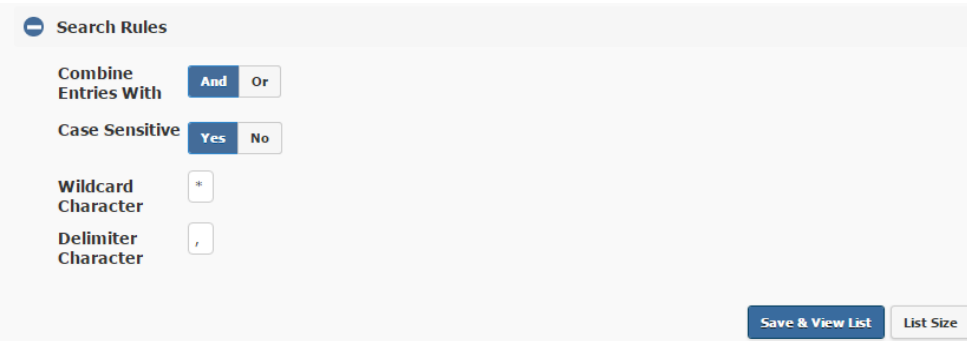- "Only Household Head" applies the search criteria to just the Head of Household. Note: When this is selected in conjunction with "Convert to Householded Result," if the Head of Household does not meet the criteria, then no one will be selected from the household.

- "Not Household Head" applies the search criteria to all members of the household except for the Head of Household. Note: When this is selected in conjunction with "Convert to Householded Result", the Head of Household will be selected as long as another record in the household meets the criteria.

2. define the various types of criteria within the five categories provided, and

- Audience Characteristics
- More - Geography
- More - Message Activity
- More - Service Activity
- More - Name and Individual Information
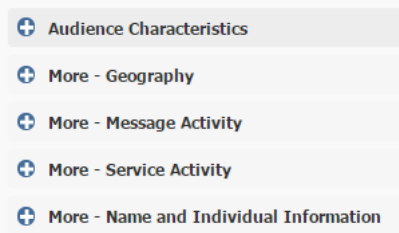
3. change any **Search Rules** as needed. Note that the Search Rules apply to all of the categories.

Search Rules

Combine Entries With	And Or
Case Sensitive	Yes No
Wildcard Character	*
Delimiter Character	,

Save & View List   List Size

Audience Builder "Combine Entries With" Search Rule

The default will **Combine Entries With** "And," which includes in the audience only Contacts who meet all of the defined criteria.

For example, you want to send an update letter to all constituents in a specific zip code "And" who also have previously received a letter from your office on the same topic.

Change this setting to "Or" when you want to include in the audience any Contact who meets any of the defined criteria.

> For example, you want to send an update letter to constituents who have a specific Issue code assigned "Or" constituents who have received a specific letter from you in the past.

Audience Builder "Case Sensitive" Search Rule

The default for the **Case Sensitive** option is "Yes." For example, if you Include "washington" as a **City**, Contacts with **City** "Washington" will not be included. So in this case, it is important to either enter city names as proper case.

Optionally, you can change the setting to "No" to eliminate the case-sensitive requirement for the defined criteria.
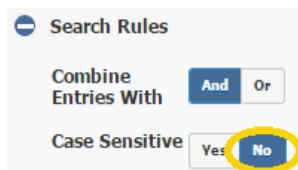
## Audience Builder "Wildcard Character" Search Rule

The default **Wildcard Character** is an asterisk (*) and may be used when there is a need to perform a partial match. For example, when for searching multiple zip codes, you can enter 2000* to find Contacts in zip codes of 20001-20009.

Saving, Re-using, and Sharing an Audience

Once you define and **Save & View List**, there are additional options to allow quick access to the audience definition in the future, for both you and other staff. Unlike Contacts Lists created with the Select List Builder and need to be re-executed upon each use, a Contacts Audience Builder list is dynamic and its definition is automatically re-executed as it is being used.

Saved Audiences Used for Outreach and Telephone Town Hall

Once an audience has been saved, it is available as an option in the Select Audience step of the Outreach Wizard, and in the Audience Selection step of the Town Hall Audience Wizard. Saved audience definitions can easily be located by typing the name of the Audience Builder search Title or by typing "audience builder" in the **Start with** field, in either the Outreach Wizard or the Town Hall Wizard.
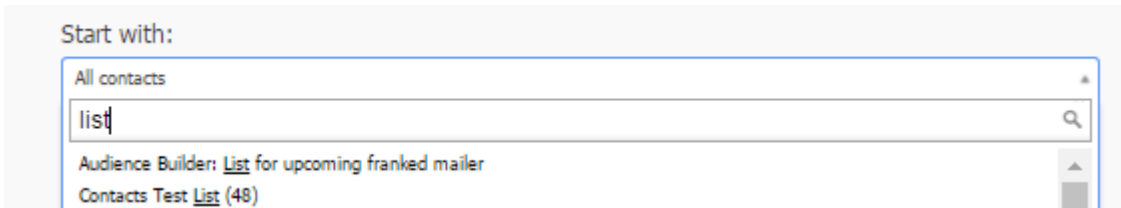

Note that the Audience Builder lists will appear with no count, because it is dynamic and will get the count when you complete the audience step in the Outreach Wizard or Town Hall Audience Wizard. Conversely, in the screen shot above, note that the Contacts List, "Contacts Test List" displays the last-executed count appended to the name in parentheses, which is the count from the last time the List was executed, and it is the predetermined number of Contacts in the audience.

Re-using an Audience

Press the **Re-use Recent Search** button to retrieve a saved audience for the same or for a different purpose. For example, you can use this option to build a new audience based on a previous one. Simply choose the audience definition from the **Re-use Recent Search** dropdown list and change the existing criteria as desired.
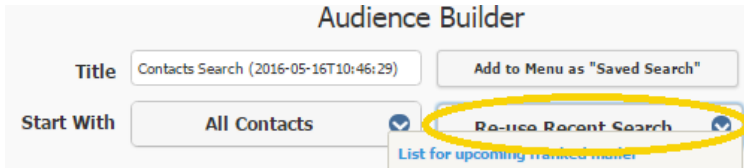

Sharing an Audience

Once an audience has been saved, from the Audience Builder definition, use the **Share** button at the bottom of the page to allow others access to the audience.
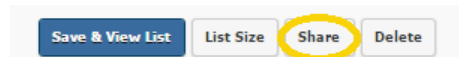
The audience then becomes available to other staff from the **Re-use Recent Search** button, and as an option in the **Start with** dropdown list for the Select Audience step of the Outreach Wizard, and for the Audience Selection step when building a Town Hall Audience. The **Share** feature is helpful when multiple staff members are working on an audience building task, allowing others to provide input in defining or reviewing the audience criteria, or to use the target audience for other engagements.
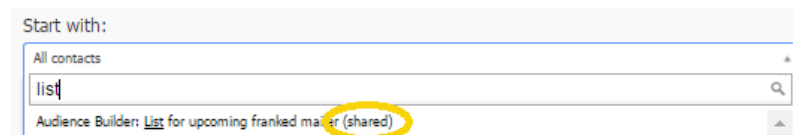
Saved Audience Searches

Once an audience has been saved, press the **Add to Menu as "Saved Search"** button for quick access to audience criteria you expect to use later. Searches saved to the menu will appear on the Contacts menu below the type-ahead Contacts search.