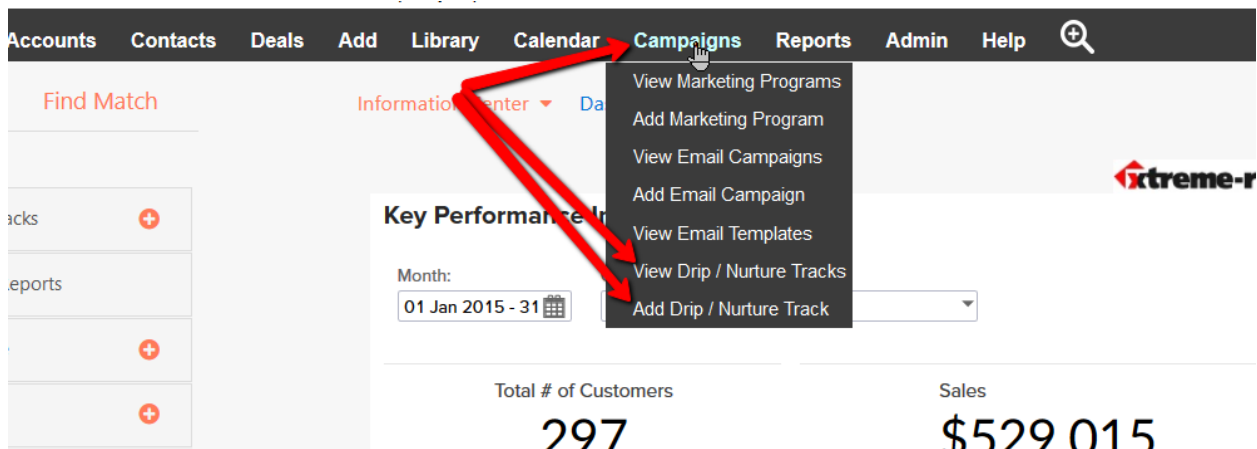


# Lead Nurturing/Drip Campaigns

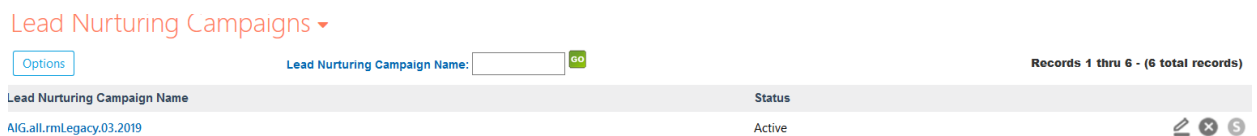
Lead Nurturing Campaigns, also called “Drip Campaigns” are ways for you to send emails to contacts, or set calendar events regarding those contacts, at various intervals based on when you have added the contact to that campaign.

You can access this section by going to the Banner Menu, choosing Marketing Studio or Campaign (based upon the version you are using), and selecting either “View Drip/Nuture Tracks” or “Add Drip/Nuture Track.” These labels/names may be different based on your system setup, so please ask your company’s admin if you are unable to find this section from the image below



Selecting “View Drip/Nuture Tracks” will bring you to a page with a list of your already-created Lead Nurturing Tracks.

From here you can view details such as the Name, and whether the track is active or not. You can also edit, delete, or save the track from the options on the right of each track.



Clicking on the Options button at the top, presents you with several options:

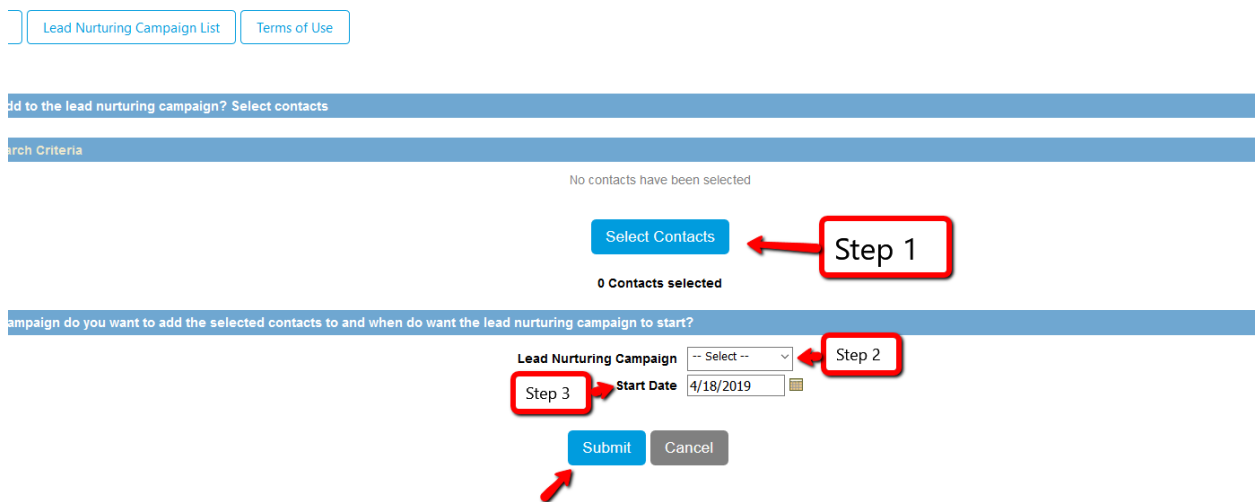


### Create a Lead Nurturing Campaign

This will bring you to the page to create a new Lead Nurturing Campaign. We'll cover this later.

### Add Contacts to Lead Nurturing Campaign

This allows you to add contacts to one of the below Lead Nurturing Campaigns



**Step 1** – Click “Select Contacts” to open a Search window where you can search for criteria, to add those contacts to the campaign.

**Step 2** – From this dropdown, you select which Lead Nurturing Campaign you want to add the selected contacts to.

**Step 3** – Choose the date, which you want these contacts to be added to the campaign. This determines when the steps begin their countdown to send emails. (The steps send emails based on how many days after the previous step.) Then **Click “Submit” to save.**

### **Import a Lead Nurturing Campaign**

This option is only available to those who have access to multiple databases within LeadMaster and allows the option to import campaigns into this specific database.

### **Report on Lead Nurturing Campaigns**

This brings you to a page where you are presented with various reports on the current Lead Nurturing tracks. On that page you will see a dropdown to select the specific Lead Nurturing Campaign, as well as summary and detail sections (click header to open section), which allow you to see who has been added to the campaign as well as which step of the campaign they are currently on. If you click on the number on the right of each line, you’ll see a list of which contacts are in that number.

--Summary Section--

## Report on Lead Nurturing Campaigns

Lead Nurturing Campaigns

Lead Nurturing Campaign: AIG.all.rmLegacy.03.2019

#### Summary

**Total number contacts in the lead nurturing campaign:** 919

**Total number of contacts who opted out of the lead nurturing campaign:** 0

**Total number contacts who have completed the lead nurturing campaign:** 0

Detail

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## Report on Lead Nurturing Campaigns

Lead Nurturing Campaigns

Lead Nurturing Campaign:

▶ Summary

♥ Detail

Step:

**Total number of contacts on this step: 822**

**Total number of contacts who have opened the email message: 83**

From the detail section, you can select a specific step, and see who is on the step, and who has opened that specific email.

## Add a new Lead Nurturing Campaign

You can add a new Lead Nurturing Campaign from the Banner menu's "Add Drip/Nurture Campaign" or by clicking "Create a Lead Nurturing Campaign" from the Options menu, as previously shown. Once clicking the link, you'll see the below screen to begin creating your Lead Nurturing Campaign.

## Add Lead Nurturing Campaign

Lead Nurturing Campaign List

**Name**

**Status**  *Lead nurturing tracks are not active until a step is added.*

**Access Security**

Available Users		Selected Users:
ALL Users Russ King Donkey Kong Michael Manager	<input type="button" value="Add &gt;&gt;"/> <input type="button" value=" &lt;&lt; Remove"/>	

Creating a Campaign is as simple as carefully reading and following the on-screen directions one step at a time from top to bottom.

**Step 1** - Give a clear name to your Lead Nurturing Campaign.

**Step 2** - The Status dropdown will become available once you add at least one “Step” to your Lead Nurturing Campaign. There is “Active” and “Not Active.” If left on the default “Not Active” then the campaign will not show up for you to add a contact to it.

**Step 3** - Access Security – This section allows you to specify which users are allowed to use this Lead Nurturing track. You can add “ALL users” or only specific users. Make your selection in the “Available Users” box, and click the “Add” to have them show in the “Selected Users” box.

**Step 4** - Click the Submit button to begin creating the steps of the Lead Nurturing Campaign.

### Step 5

Once you click Submit, two more options become available at the top of the screen, and a section called “Lead Nurturing Campaign Steps” shows at the bottom of the screen.

You can now decide the first step of your Lead Nurturing Campaign. If you want to send out an email to the contact added to the campaign, click on the “Add Email Step” option at the top of the screen.

Lead Nurturing Campaign List   Add Email Step   Add Appt / Call Back Step

Lead nurturing campaign created

Name: Welcome New Users

Status: Not Active *Lead nurturing tracks are not active until a step is added.*

Access Security

Available Users	Selected Users:
ALL Users	ALL Users
Russ King	
Donkey Kong	
Michael Manager	

Add >> << Remove

SUBMIT CANCEL

Lead Nurturing Campaign Steps

### Add Email Step – Screen

Once clicking on “Add Email Step” you’ll be brought to a screen where you can create your email, seen in the below image

## Add Step

Lead Nurturing Campaign List   Select Email Message Template   Help Guide

Lead Nurturing Campaign Name: Welcome New Users

Step Name:

Step Order: 1

Days After Assignment:  Enter 0 to send before 3:00 PM ET

Step Type: email

Details:

From:  Group List

From Address:

CC:

BCC:

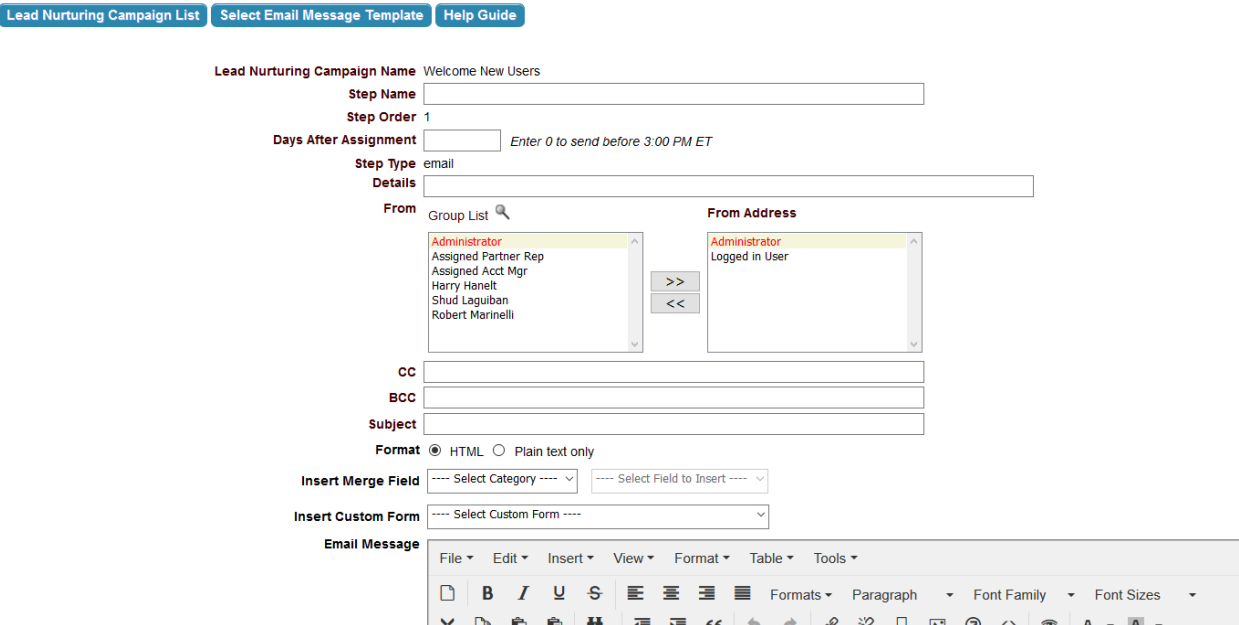
Subject:

Format:  HTML  Plain text only

Insert Merge Field:  Select Category  Select Field to Insert

Insert Custom Form:  Select Custom Form

Email Message



Along the top of the screen you see Three menu options:

1. “**Lead Nurturing Campaign List**” (Brings you back to the list of Lead Nurturing Campaigns),
2. “**Select Email Message Template**” (Brings you to a list of your Email Templates to use for this Email Step. Template details will be pushed into the below fields), and
3. “**Help Guide**” (Brings you to a page with some help text).

Continuing down the page, fill in the following details:

- **Step Name** – Name this specific Step so you know what the details are, such as “Welcome Email”
- **Step Order** – Lets you see what number step you are on, in the Lead Nurturing Campaign.
- **Days After Assignment** – If you are on Step 1, this will be the number of days to send this email after the contact has been added to this Lead Nurturing Campaign. If you are on consecutive steps (Steps 2 or higher), this will say “Days after Previous Step” and will send after the number of days you specify, after the previous step in the Lead Nurturing Campaign.

*For example:*

*Step 1 = Send Email, set for 1 day, will send an email to a contact 1 Day after he/she was added to a Lead Nurturing Campaign.*

*Step 2 = Send Second Email, set for 3 Days after previous step, will send Second Email 4 days after he/she was added to a Lead Nurturing Campaign (1 day first step + 3 Days after = 4 days)*

- **Step Type** – States whether this is an email step, or an Appt/Call Back step
- **Details** – Allows you to enter details describing this step, for your benefit
- **From** – Lets you choose who this email will appear to be from
- **CC** – Let's you “Carbon Copy” the email to an email address
- **BCC** – Let's you “Blind Carbon Copy” the email to an email address
- **Subject** – Is the Subject of the email
- **Format** – Let's you choose an HTML or Plain Text formatted email
- **Insert Merge Field** – Allows you to personalize the email with system field values such as “Contact First Name” into the Email Message
- **Insert Custom Form** – Allows you to insert a link to a custom form into the Email Message.
- **Email Message** – Is where you would type, or see, the main message of the email.

Attachments – Allows you to add an attachment to the email message. Be prudent with attachments, as emails including attachments are more easily flagged as spam by email servers. Don't send large files, no one likes to receive large files in email. If you have a large file, upload it to your DropBox or Google Drive and add a link to the file in the email. For images, don't use full scale images, use 72 DPI.

Next you can choose to include your Email Signature as specified in your User Settings.

You may also choose to send a Test Email Message to a specified email address if you so choose. This test email will be before any merge-field personalization and so may look different from what your Contact will see.

After everything is filled out, click the Submit Button to add this step to the Lead Nurturing Track.

After Adding a Step, you are brought to the Lead Nurturing Screen and will be able to see the newly added step at the bottom of the page



## Lead Nurturing Training Manual

Name: Training

Status: Not Active

Access Security: Available Users (Russ King, Donkey Kong, Michael Manager) | Selected Users: ALL Users

Buttons: Add >>, << Remove, SUBMIT, CANCEL

Step Order	Step Name	Days After	Type
1	Welcome Email	10	email

You can edit, or delete, your steps by clicking the Pencil, or X, icons on the right side of each step

### Adding an Appt/Call Back Step

If you want to add a calendar event, perhaps reminding you to call the contact at a specified date, you can add an “Appt/Call Back Step.” When you click on that option you’ll be brought to the following page where you can add the below necessary details

Lead Nurturing Campaign Name: Training

Step Name: [Text Field]

Step Order: 2

Days After Previous Step: [Text Field]

Step Type: appt / call back

Details: [Text Area]

Add Field: [Select Category] [Select Field to Insert]

Event Name: [Text Field]

Event Type: [None]

Start Time: 12:00 AM [all day checkbox]

End Time: 12:30 AM

Attendees: Group List (Administrator, Logged in User, Assigned Partner Rep, Assigned Acct Mgr, Russ King) | Group List Attendees

Buttons: SUBMIT, Cancel

- **Step Name** – Give a descriptive name to your step
- **Step Order** – Shows which step number you are on

- **Days After Previous Step** – Lets you specify the number of days after the previous step to fire this step. This follows the same rules as explained in the Email Step previously discussed.
- **Step Type** – Tells you the type of step you are on: email, or appt/call back
- **Details** – Allows you to add your own details to this step for your benefit
- **Add Field** – Same as the “Merge Field” previously discussed, you can personalize the Event name with certain Contact Details such as “Call [Contact First Name] at [Contact Phone Number]”
- **Event Name** – Give a Name to the event. This name will be what shows on your Calendar
- **Event Type** – Choose what type of Event from your dropdown
- **Start Time** – Choose a Start time
- **End Time** – Choose an End Time
- **Attendees** – Choose whose Calendar this Appt/Call Back will be for: Select from the “Group List” and click the “>>” button to add your selection to the “Group List Attendees.”

Click Submit when finished, to add the step to the Lead Nurturing Track.

Back on the Lead Nurturing Campaign details, you’ll see your list of steps at the bottom of the screen, as below.

Step created

**Name**

**Status**

**Access Security**

**Available Users**

- Russ King
- Donkey Kong
- Michael Manager

Add >>

<< Remove

**Selected Users:**

- ALL Users

Lead Nurturing Campaign Steps		
Step Order	Step Name	Days After
1	Welcome Email	10
2	Follow-Up Phone Call	1

If you are ready to start adding Contacts to this Lead Nurturing Campaign, be sure to change the status from “Not Active” to “Active” at this point.

You can then Add Contacts in the manner shown above through the “Add Contacts to Lead Nurturing Campaign” option.