Creating Responsive Drip Campaigns

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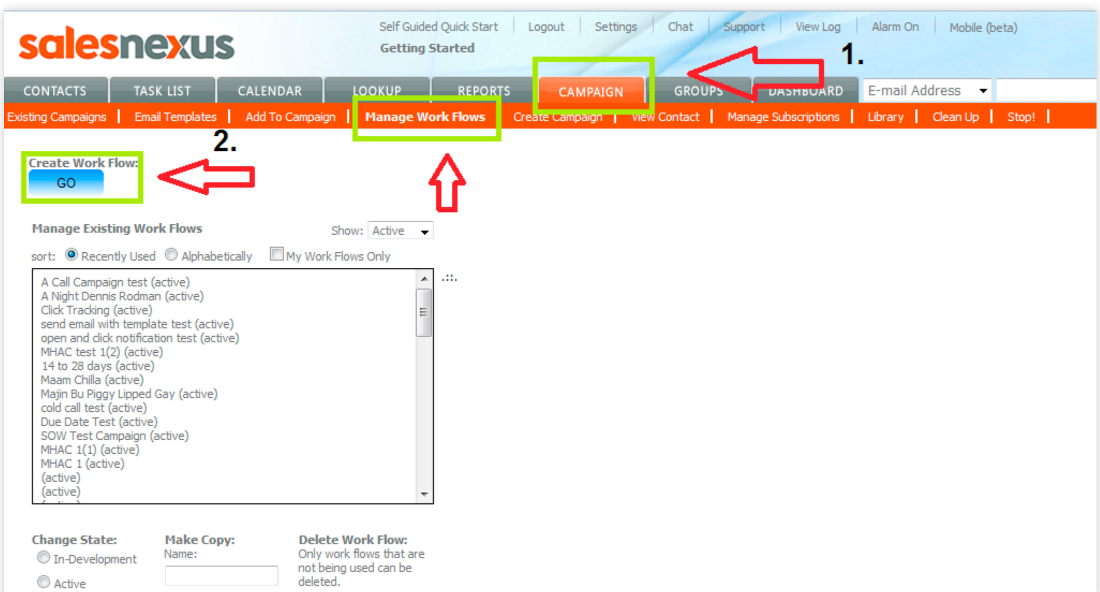
Sending a drip campaign to a prospect or a client is a great way to engage them without taking your staff's time. However, when they do engage with you there needs to be an acknowledgement that changes their treatment. One of the ways you can acknowledge them is to have a sales person call them. Another way is to change the emails they see based on their interaction with you. SalesNexus can help you do this with a Tier 2 Campaign.

If you already know how to create workflows and want to jump to have clicks in one campaign trigger another campaign (Tier 2), click **here**.

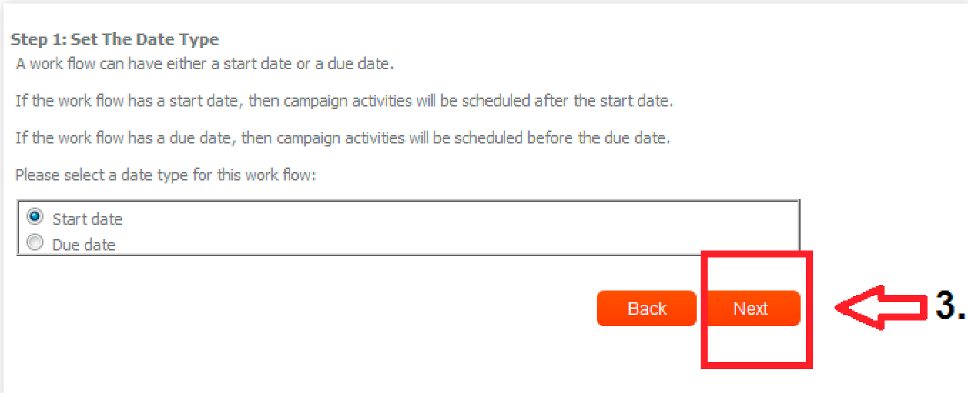
To set up your on-going email campaign, first create a workflow:

A) First we need to create the second campaign. This is the one that will be used for any contacts that clicked on any links associated with your first email campaign. It can be an email campaign, a call campaign or both.

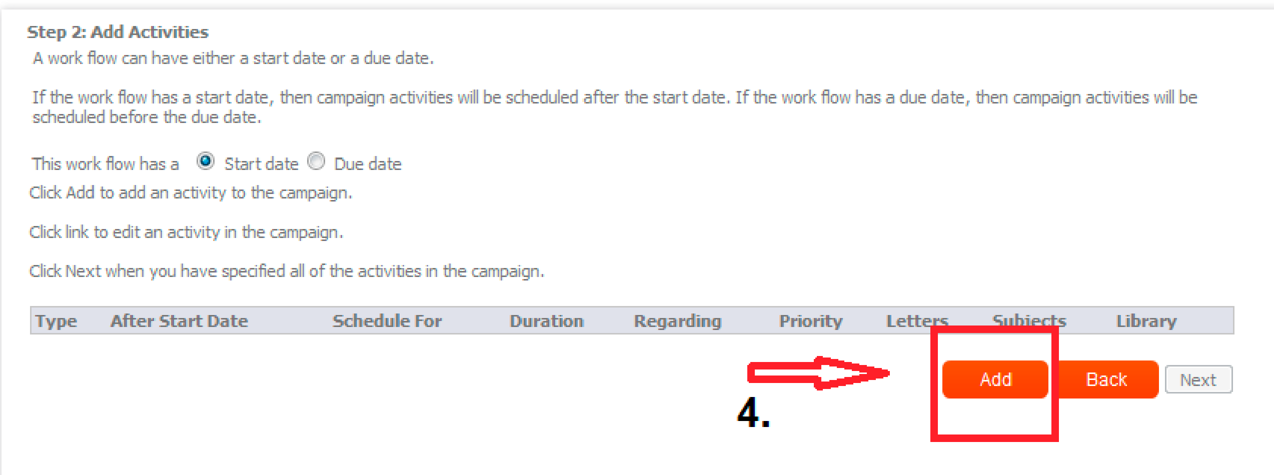
1. Go to Campaign > Manage Workflows
2. Click GO under Create a Workflow



3. Click Next

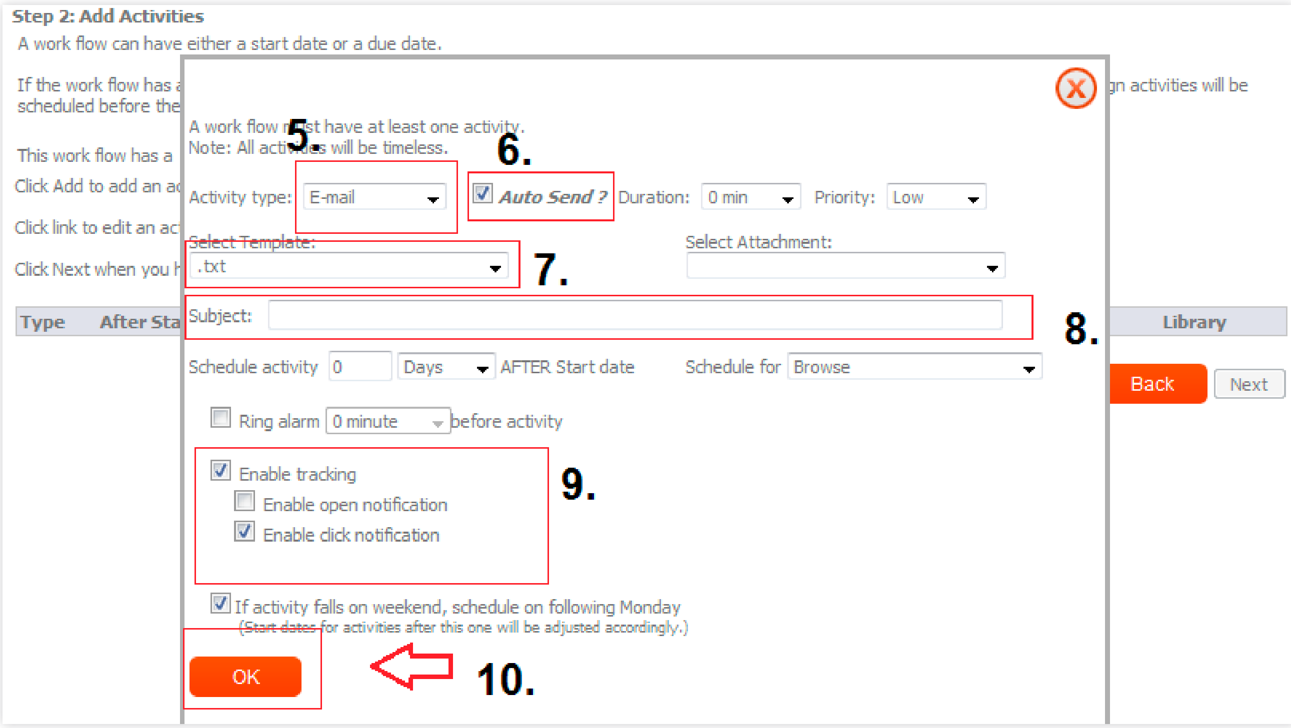


4. Then Click Add

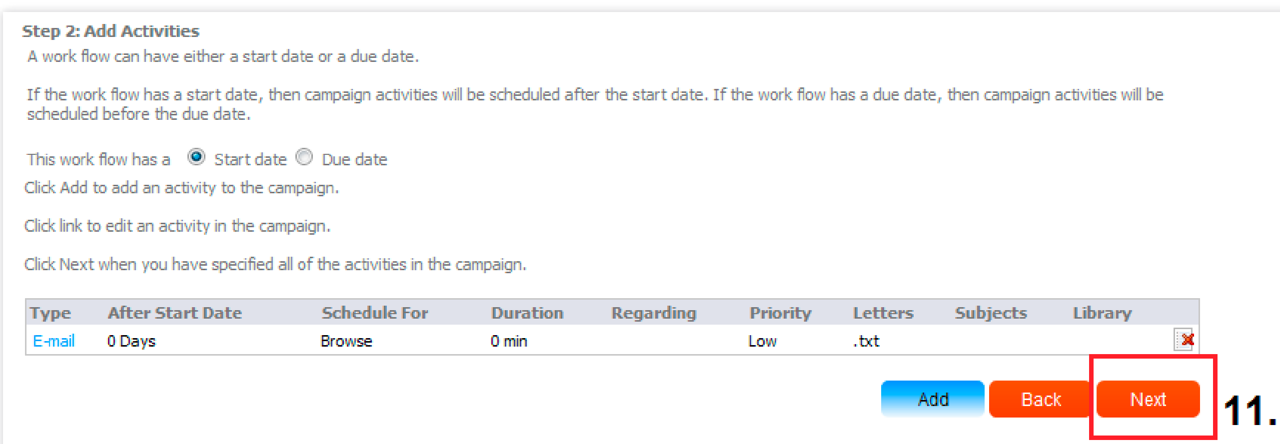


5. Change the Type to Email
6. Click on the checkbox that says Auto Send
7. Choose your template (the email template you made)
8. Then put in a subject line (please take note, don't make the subject line too long, and no special characters)
9. Choose email tracking. You can click on Enable Click notification if you want your Sales staff to know when the link is clicked but it is not necessary for Tier 2 Campaigns to work.

10. Please review everything. If everything looks good (do not forget to put a check on Auto Send! This allows your emails to go out without you logging in) Click OK



11. You can click Add to add additional emails, or calls to this campaign (see below for how to add a call) when done, then click Next



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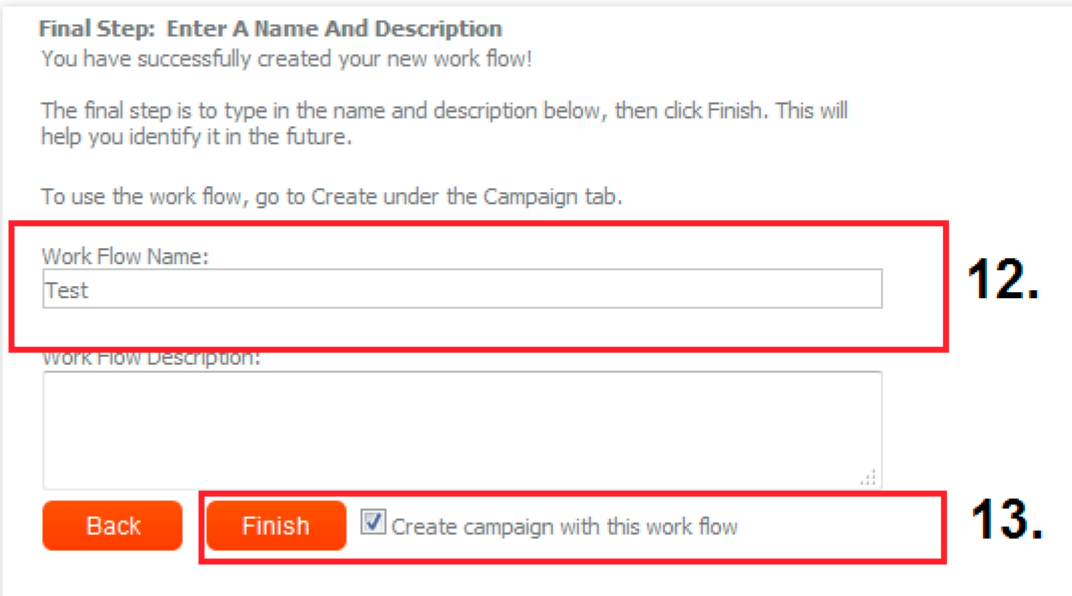
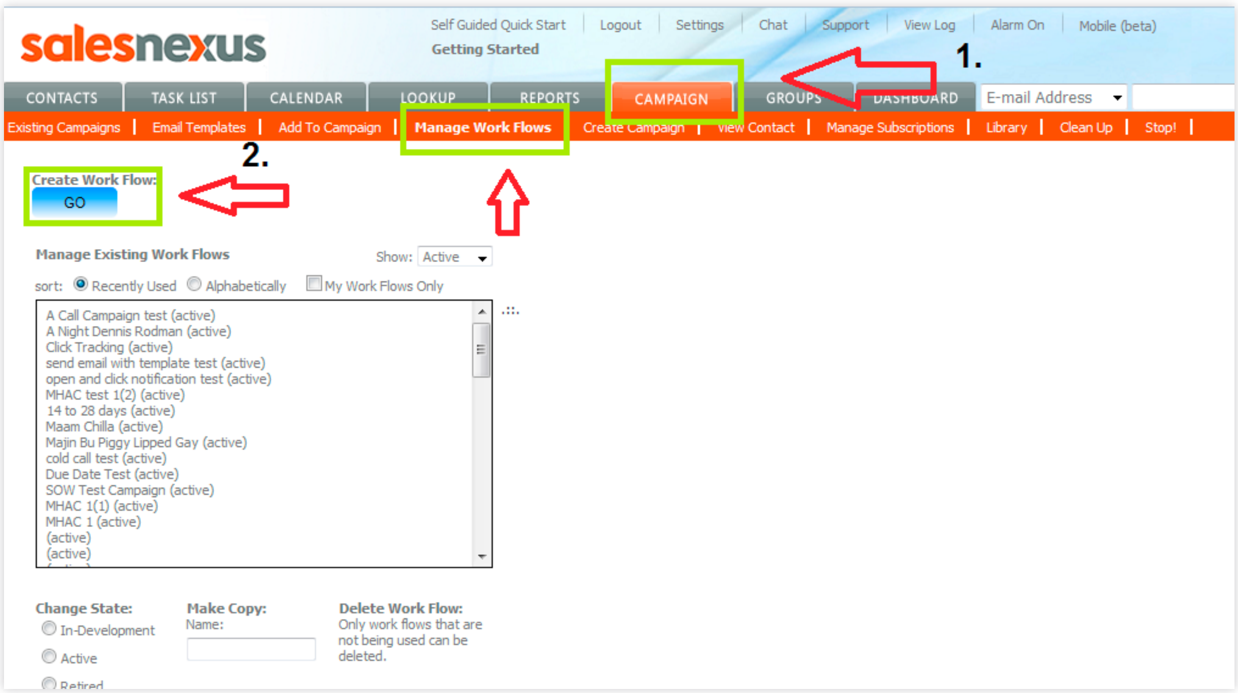
12. Name your Workflow. Again, no special characters, and don't make it too long
13. Look under the table, you'll see Finish. Before you hit finish, please make sure the checkbox beside it is checked. It's called Create a campaign with this workflow. Make sure it's checked. Once everything looks good, hit Finish.



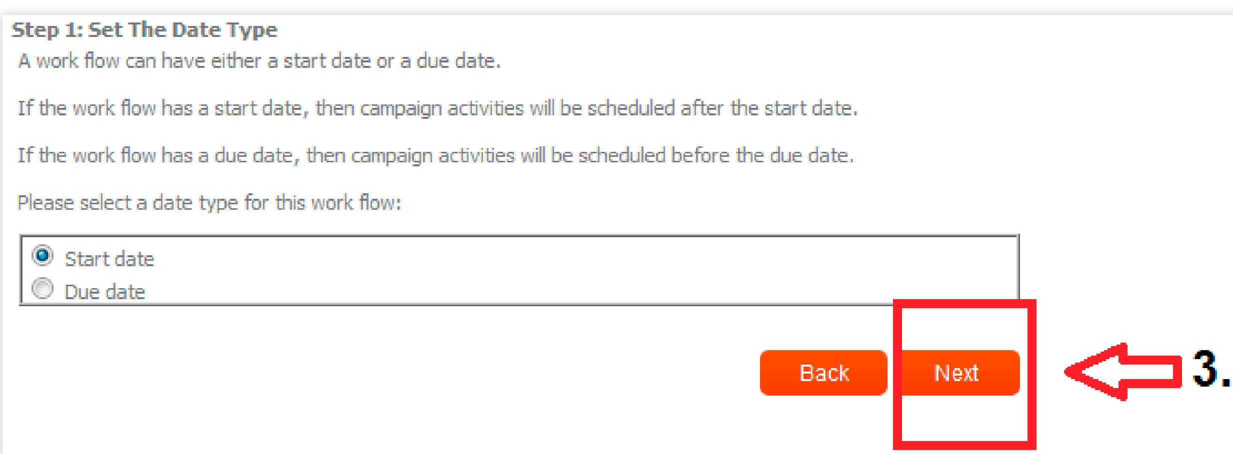
1) To add a call to an existing campaign go to Step 4

2) To create a pure call campaign, here are the steps:

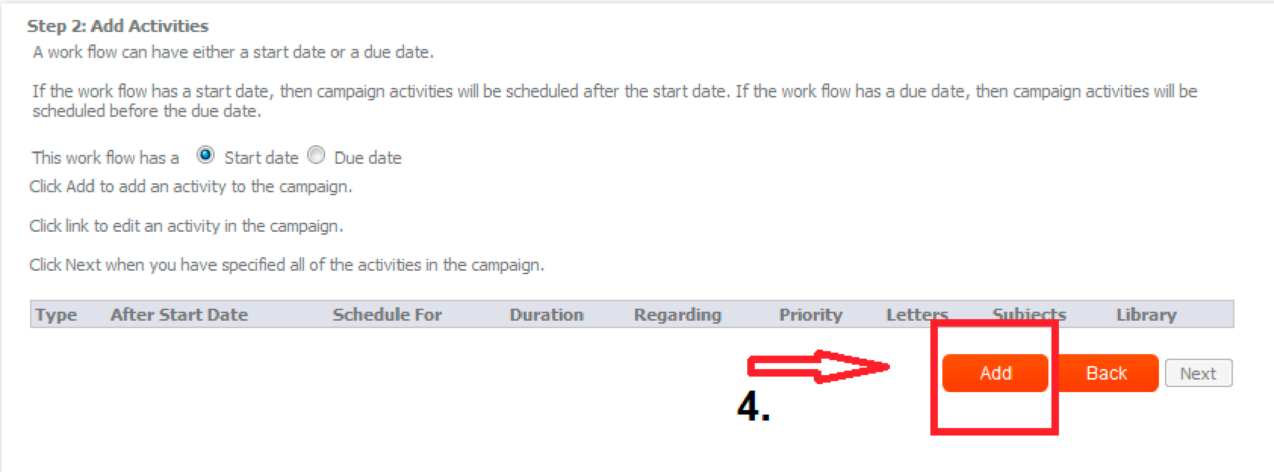
    1. Go to Campaign > Manage Workflows
    2. Click GO under Create a Workflow



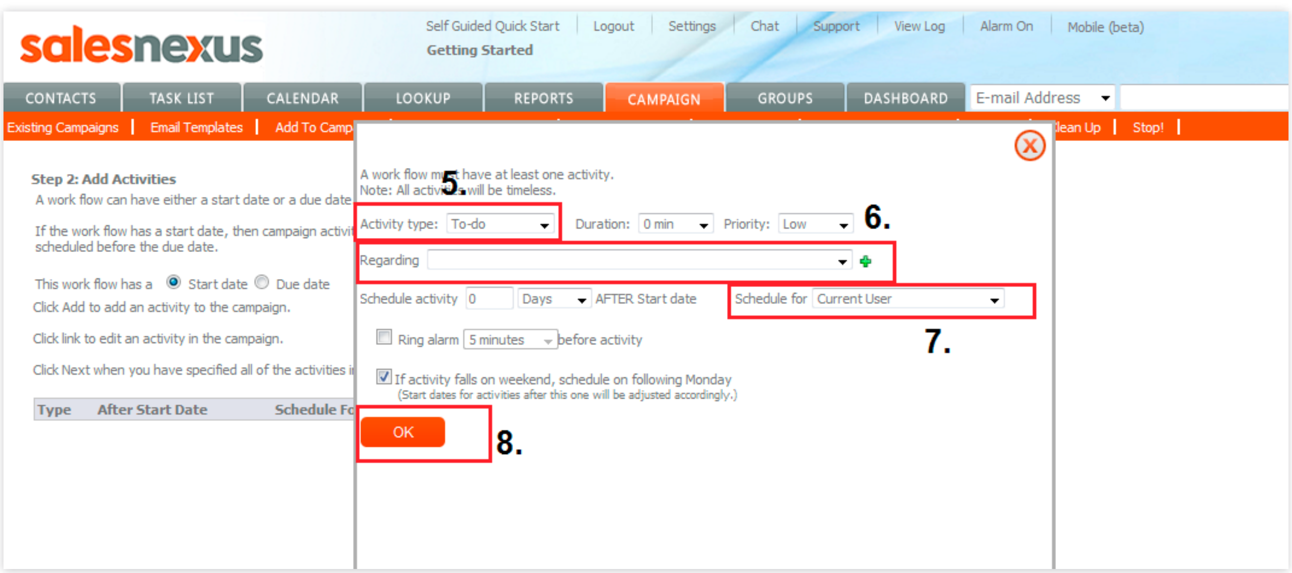
    3. Click Next



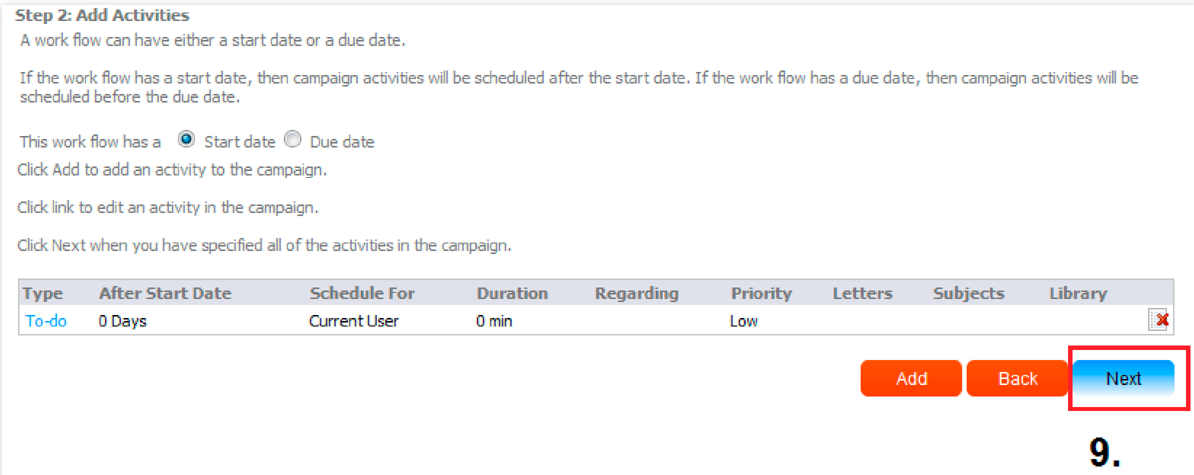
4. Then Click Add



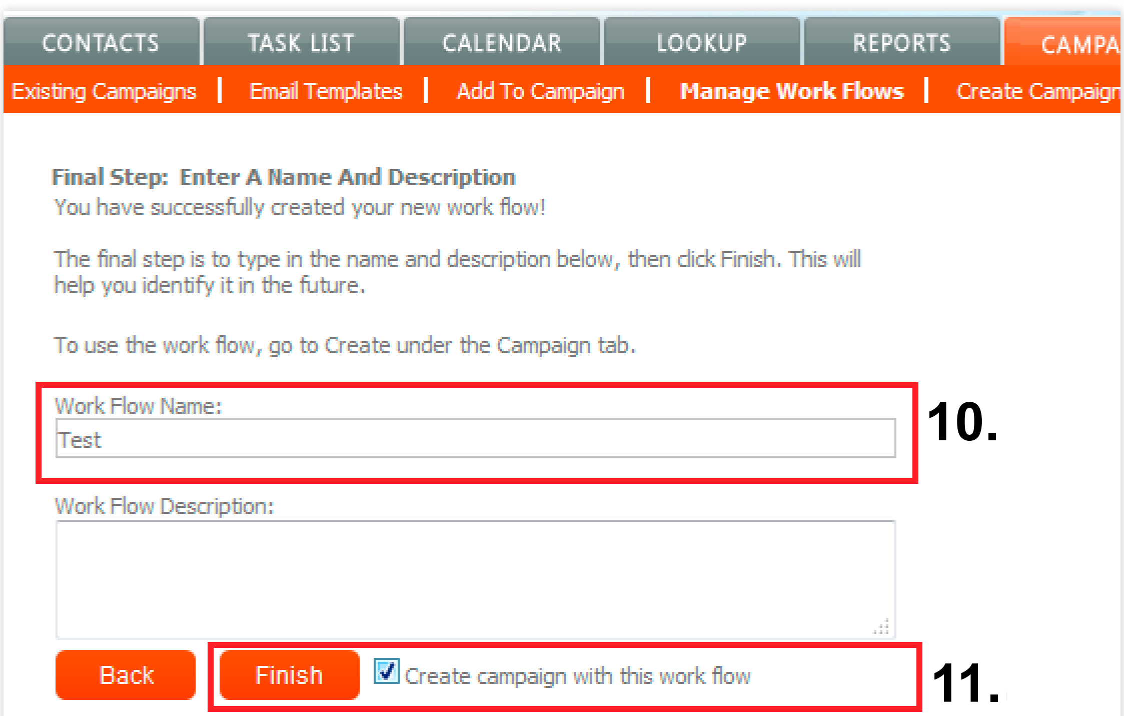
5. Change the Type to Call
6. Put in any Subject line (no special characters, and keep it as brief as possible)
7. Change the Schedule for dropdown to the desired user that will be assigned to do the call for the clickers, options of Current User and Contacts Record Manager allows you to not set it for a specific person until the time of using it.
8. Click OK,



9. If you do not have any other items to add to this campaign Click Next. If you want to add additional Items click Add.



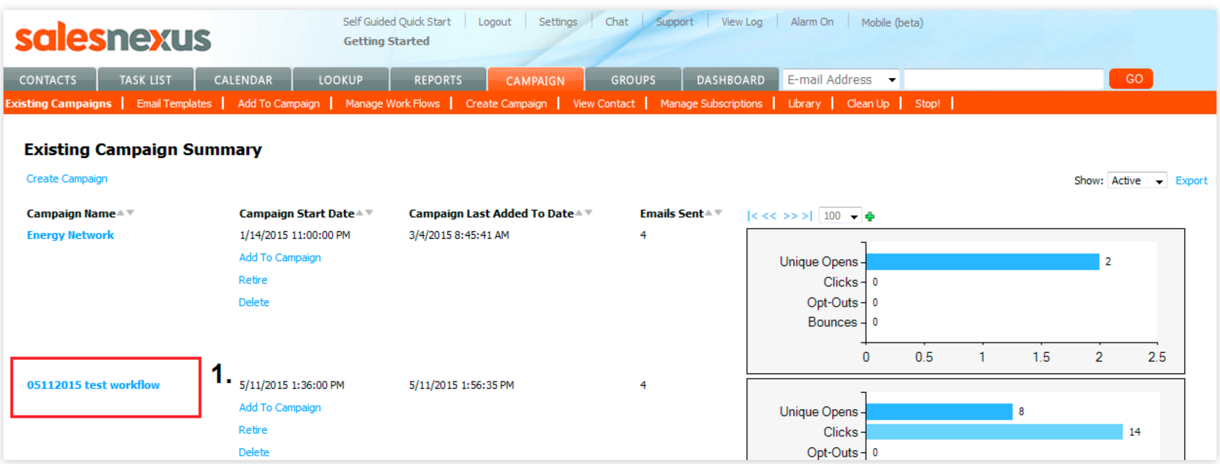
10. Name the workflow
11. Before clicking Finish, click the checkbox that says Make Campaign with this Workflow. It's located beside the Finish button. Once checked, click Finish.



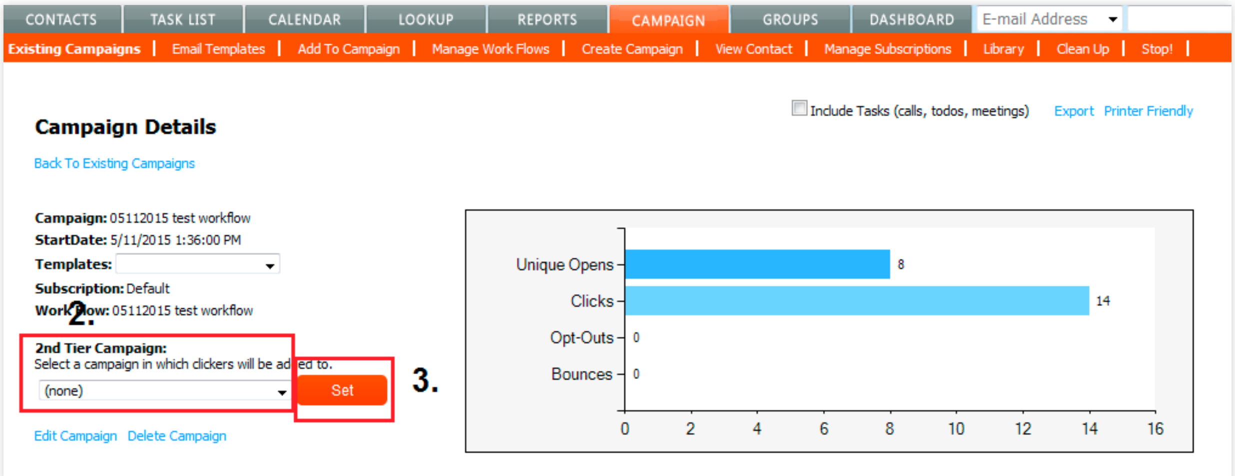
With your campaign ready to go, we will set up the Tier 2.

Tier 2 Campaigns are follow-up campaigns for those who clicked the hyperlink in an email. This new campaign can be either another email campaign or a combination of emails and calls. This works on just those who clicked the hyperlink in an email. It will automatically cancel the rest of the first campaign and start them on the Tier 2 campaign. To have the Tier 2 option, you will need to make sure your database is on the Complete version. That allows the email analytics driving the Tier 2 campaign.

Go to Campaign > Existing Campaigns and look for your Initial campaign. If you don't see it listed, then you just need to go send it to yourself so it will show up.



1. Click on the campaign name.
2. On the middle left you'll see details about the campaign. Second part will say 2nd Tier Campaign—Change the dropdown to the name of the follow up campaign
3. Then click Set



Please take note that the 2nd tier campaign will take effect moving forward. Any emails sent or pending will not be affected.

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