

Swiftpage Drip Marketing Overview

Table of Contents

Drip Marketing Campaign Manager	1
Drip Marketing Stage Manager	3
Getting started with a Drip Marketing Campaign	3
Copy a Drip Campaign	4
Drip Marketing Stages	5
Creating and Editing Drip Marketing Campaigns	6
Creating and Editing Drip Marketing Campaign Stages	7
Drip Marketing Reports	9
Drip Marketing Preferences	10
Drip Marketing List Viewer	11
Syncing Contacts to a Drip Marketing Campaign using the List Manager	12

Swiftpage Drip Marketing Help

In this help document you will learn about the following:

- Drip Marketing Campaign Manager
- Drip Marketing Stage Manager
- Getting started with a Drip Marketing Campaign
- Copy a Drip Marketing Campaign
- Drip Marketing Stages
- Drip Marketing Reports
- Drip Marketing Preferences
- Drip Marketing List Viewer

Drip Marketing Campaign Manager

The Drip Marketing Campaign Manager provides an overview of all the Drip Marketing Campaigns you have created. You can Launch, View, Suspend, Edit, and Delete your Campaigns. You may also view the uploaded contact list and Reports.

Swiftpage E-marketing Drip Marketing Campaign Manager

Home New Campaign Copy Campaign Preferences Fast Track ?

[Show Legend](#)

Campaign name	Status	Contacts						
Anchor Date Example 1		9	Launch	Edit	Delete	List Viewer	Reports	
Anchor Date Example 2		38	Suspend	View	Delete	List Viewer	Reports	
Anchor Date Example 3		0	Suspend	View	Delete	List Viewer	Reports	
Calendar Example		36	View	Edit	Delete	List Viewer	Reports	
Duration Example		0	Launch	Edit	Delete	List Viewer	Reports	

Drip Marketing Campaign Status:

Drip Marketing Campaigns have the following statuses:

Build – The hammer and chisel icon on the Drip Marketing Campaign Manager denotes that the Campaign is currently in Build. Build means that the stages in a Campaign are being edited. New Campaigns start with this Status, and remain so until they are Launched. Contacts cannot be added to a Campaign that is in Build status.

Active – The Active Status can be identified by the green circle icon on the Drip Marketing Campaign Manager. A successfully Launched Campaign is Active and remains Active until it is Suspended or Complete. A Campaign must be Active for its stages to execute.

No Contacts Active – This Status is represented by a yellow circle icon. The Campaign has been successfully Launched but it does not contain any contacts. The Status will automatically change to Active once contacts have been uploaded to the Campaign.

Suspended – The Suspended Status occurs when a Drip Marketing Campaign has been manually or automatically Suspended. The stages of a Suspended Campaign do not execute. Suspended Campaigns can be identified by the red octagon icon on the Drip Marketing Campaign Manager.

Complete – A Campaign is marked as Complete once all of its stages have been executed. This Status is represented by an orange check mark.

Drip Marketing Legend	
	Contacts can be loaded from an ACT! database
	Contacts can be loaded from a Sage SalesLogix database
	Contacts can be loaded from a SageCRM database
	Contacts can be loaded from a Swiftpage Autoloader Survey
	Contacts can be loaded from a Swiftpage Contact List
 Anchor	Campaign stages are defined as a timeframe before or after a specified Anchor date
 Duration	Campaign stages are defined as days since a Contact enters a campaign
 Calendar	Campaign stages are defined by specific calendar dates
	Campaign is in Build mode
	Campaign has been Launched and is Active
	Campaign has been Launched but contains NO contacts
	Campaign is Suspended
	Campaign is Completed

Drip Marketing Campaign Stage Manager

The screenshot shows the 'Swiftpage E-marketing Drip Marketing Campaign Manager' interface. At the top, there are navigation buttons: 'Home', 'New Campaign', 'Copy Campaign', 'Preferences', 'Fast Track', and a help icon. Below this is a 'Show Legend' link. The main area is a table with columns for 'Campaign name', 'Status', and 'Contacts'. The table lists several campaigns, including 'Anchor Date Example 1', 'Anchor Date Example 2', 'Anchor Date Example 3', 'Calendar Example', and 'Duration Example'. Each row has a set of action buttons: 'Launch', 'Edit', 'Delete', 'List Viewer', and 'Reports'. A red circle highlights a dynamic arrow icon on the right side of the 'Anchor Date Example 2' row. A red oval highlights the 'Stages' section for 'Anchor Date Example 2', which shows a sequence of seven stages with icons and numbers 1 through 7. A red box highlights the 'Description' section for 'Anchor Date Example 2', which includes 'Type: Anchor Date', 'Source: E', and 'Send As: Test'. Red arrows and boxes labeled 1, 2, and 3 point to these specific elements.

Campaign name	Status	Contacts	Actions
Anchor Date Example 1	Red octagon	9	Launch, Edit, Delete, List Viewer, Reports
Anchor Date Example 2	Green circle	38	Suspend, View, Delete, List Viewer, Reports
Anchor Date Example 3	Yellow circle	0	Suspend, View, Delete, List Viewer, Reports
Calendar Example	Checkmark	36	View, Edit, Delete, List Viewer, Reports
Duration Example	Wrench icon	0	Launch, Edit, Delete, List Viewer, Reports

- 1) **Dynamic arrow** – Clicking the dynamic arrow shows or hides details about a specific Drip Marketing Campaign.
- 2) **Stages** - This displays the number, type, and sequence of stages in the Drip Marketing Campaign.
Description – Details the Campaign Type, Source, and Send As UserID.

Getting started with a Drip Marketing Campaign

The screenshot shows the 'Swiftpage E-marketing Drip Marketing Campaign Manager' interface. At the top, there are navigation buttons: 'Home', 'New Campaign', 'Copy Campaign', 'Preferences', 'Fast Track', and a help icon. Below this is a 'Show Legend' link. The main area is a table with columns for 'Campaign name', 'Status', and 'Contacts'. Below the table, there is a message: 'You currently have No Drip Marketing campaigns. To start one, click the [New campaign] or [Copy campaign] button.'

To get started with Swiftpage Drip Marketing you will need to select either New Campaign or Copy Campaign. When you click on New Campaign, you will see the below screen and the following three options: Anchor Date, Calendar, or Duration.

Swiftpage E-marketing Drip Marketing Campaign Create

Home Campaign Manager Preferences Fast Track ?

General

Name:

Description: * Optional

Send As: Test

Contact Source:

Campaign types

1 Date  Anchor Date * Stages are defined as a timeframe before or after Anchor date
* Campaign ends on the date of the last defined Stage

2 Calendar  * Stages are defined by specific calendar dates
* Campaign ends on the date of the last defined stage

3 Duration  * Stages are defined as days since Contact enters campaign
* Campaign ends on the chosen date, or ongoing
* This is also known as a Sequential Autoresponder

Cancel Next >>

1) The Anchor Campaign type allows stages to be setup based on a date before or after a certain Anchor Date (such as an event). All of the stages are added in relation to the specified date as days, weeks, or months before or after. This Campaign type ends on the date of the last specified stage.

2) The Calendar Campaign type allows stages to execute on specific calendar dates. This Campaign type ends on the date of the last specified stage.

3) The Duration Campaign type allows stages to be created based on the days since a contact has entered the Campaign. This Campaign type may either be ongoing or end on a specified date.

Copy a Drip Campaign

To Copy a Global Drip Marketing Campaign or one that you have previously built, click the Copy Campaign button on the Drip Marketing Campaign Manager. To copy a Campaign you have created, you will want to check the Local campaigns checkbox. Now, select the Campaign that you would like to Copy and enter a name and description. Select the Swiftpage Send As UserID, offset the Campaign dates, select a contact loading source, and then click Copy.

Swiftpage E-marketing Drip Marketing Campaign Copy Campaign Manager

Campaigns: DMS Brochure Follow Up Platinum
 DMS Customer Retention
 DMS Customer Retention Platinum
 DMS Customer Satisfaction
 DMS Ebook Marketing
 DMS Ebook Marketing Platinum
 DMS Event Registration
 DMS Event Registration Platinum
 DMS Event Reminder
 DMS Initial Contact Follow Up

Local campaigns (*) Global campaigns

Drip campaign info

Type: Anchor Date

Stages: 8
 Owner: Swiftpage
 Anchor: 1/31/2009

Name:

Description:

Sender:

Time offset: Days * Added to Anchor date

Contact Source:

Drip Marketing Stages

The Swiftpage Drip Marketing level you have purchased determines which Drip stage types you are able to utilize. We offer nine stage types: Email, Call List, Postcard, Letter, Fax, Telemarketing, Export, Transfer, and Review.

Swiftpage E-marketing Drip Marketing Campaign Edit Preferences Fast Track ?

Home Campaign Manager

To Add a stage to Campaign, click an Icon below


Email


Call List


Postcard


Letter


Fax


Telemarketing


Export


Transfer


Review

Create a Call list Cancel

Qualifying contacts will be added to a Call List on selected day

Stage information

Name:

Comments:

Create on

Days

Contacts

Contacts from previous Email stages, matching Response by Email response

Opened, no clicks Clicked a link Unopened

From stage:

Options

Contact list Sync is desired prior to execution

Email notification

Send days before

Send days after stage execution

To create a stage in your Campaign, click on the icon of the stage type you would like to add. Then you will need to customize that stage by adding information such as a name, date, contacts to include, and any email notifications wanted before or after the Campaign is sent out. After this is done, click on Add Stage>> to create a stage.

Stage Details

Email- Sends an email to a specified group of contacts.

Call List- Automatically creates a Swiftpage Call List. A Call List is a group of contacts that are ranked based on their interaction with an email blast.

Postcard- Sends a list of contacts to a third party print company.

Letter- Sends a list of contacts to a third party print company.

Fax- Sends a list of contacts to a third party fax Company.

Telemarketing- Sends a CSV file of contacts to a third party call center to call your contacts on your behalf.

Export- Creates a list of qualifying contacts in a .CSV format and automatically emails it to you.

Transfer- Automatically moves qualified contacts to another Drip Marketing Campaign.

Review- Sends an email notification to you on a selected date. It also allows you to specify a date to sync your contacts' data with your database and, if desired, to automatically suspend your Campaign.

Creating and Editing Drip Marketing Campaigns

The Drip Marketing Campaign editor is described below. The editor can be accessed from the Drip Marketing Campaign Manager by clicking the Edit button. If your Drip Marketing Campaign is Active, it must be Suspended before editing can begin.

Swiftpage E-marketing Drip Marketing Campaign Edit

Home Campaign Manager Preferences Fast Track ?

To Add a stage to Campaign, click an Icon below

1 **Email** Call List Postcard Letter Fax Telemarketing Export Transfer Review

2 **Anchor Date Example 1**
 Date 27
 Anchor date: 11/7/2011
 Launched: 11/9/2011
 Sender: Test
 Reports Expand All

3 # Type Stage name Execution
 1 **E** Newest Product Promotion 5 days after at 3:15 am

4 Status: Open Edit Delete
 Include: All Contacts in Drip Marketing list
 Subject: Try our newest product!
 Template: zze_Sample - Product Promotion 1
 Notify: 1 day before.
 Execute: 11/12/2011

5 2 **E** Product Promotion 2 6 days after at 3:15 am
 3 Call List Example 7 days after at 3:15 am

Execution dates
 Skew unexecuted stages by: 0 days Submit

1) Drip Marketing Stage Creation – Click one of these icons to create a new Drip Marketing stage. A Drip Marketing Campaign is comprised of one or more stages. Stage availability and functionality is determined by the Drip Marketing Service Level you have purchased.

2) Campaign Information – Shows details regarding the Drip Marketing Campaign that is currently being edited.

3) Dynamic arrow – Clicking the dynamic arrow shows or hides details about a specific Drip Marketing stage.

4) Edit and Delete buttons – Clicking the Edit button opens the stage for editing. All parts of the stage can be changed at any time before the stage executes. Clicking the Delete button deletes that stage.

5) Viewing Stages – After Drip Marketing stages are created, they are listed on the right hand side of the Edit screen. From left to right, the Stage Number, Stage Type, Stage Name and Execution date are shown for each stage.

Creating and Editing Drip Marketing Stages

The Drip Marketing Stage Editor can be accessed from the Drip Marketing Campaign Manager by clicking the Edit button. If your Drip Marketing Campaign is Active, it must be Suspended before editing can begin.

Send Email Blast
An email will be sent to each qualifying contact on selected day

1 Stage information
Name: _____
Comments: _____

2 Email
Subject: _____
Template: **zze_Sample - Product Promotion 1** **Preview**

3 Send on
1 Days before 11/7/2011
Time: 3:15 AM (UTC -07:00) Mountain Time (US & Canada)

4 Contacts
 All Contacts in Drip Marketing list
 Contacts from previous Email stages, matching Response
 From stage: _____
 Also filter Contacts by matching Database field criteria

5 Options
 Contact list Sync is desired prior to execution

6 Email notification
 Send 1 days before
 Send 0 days after stage execution

Date 27
Anchor Date example
Anchor date: 11/7/2011
Launched: No
Sender: Test [Expand All](#)

Type Stage name Execution

Cancel **Add Stage >>**

1) Stage Information – Each stage requires a Stage Name. The Stage Name is used for internal purposes only. You will be able to identify stages in the Editor, Viewer, and Reports based on the Stage Name. The Comments field is optional.

2) Email – For the Email stage type, the Email section provides details about the email you will be sending. You will need to enter a Subject, select an email Template, and enter an associated Personal Message if the selected Template contains a Personal Message Mail Merge field. This category is unique to each stage type. If you are creating a Call List stage, for example, this section will provide a Call List Name.

3) Send On – For the Email stage type, the Send On section allows you to select the date and time your email blast will be sent. This category is unique to each stage type. If you are creating a Call List stage, for example, this section will allow you to select a date and time to create a Call List.

4) Contacts – The contacts section allows you to select which contacts you would like to affect (For example: send an email to, create a call list of, export or whatever your stage type is). Options here include:

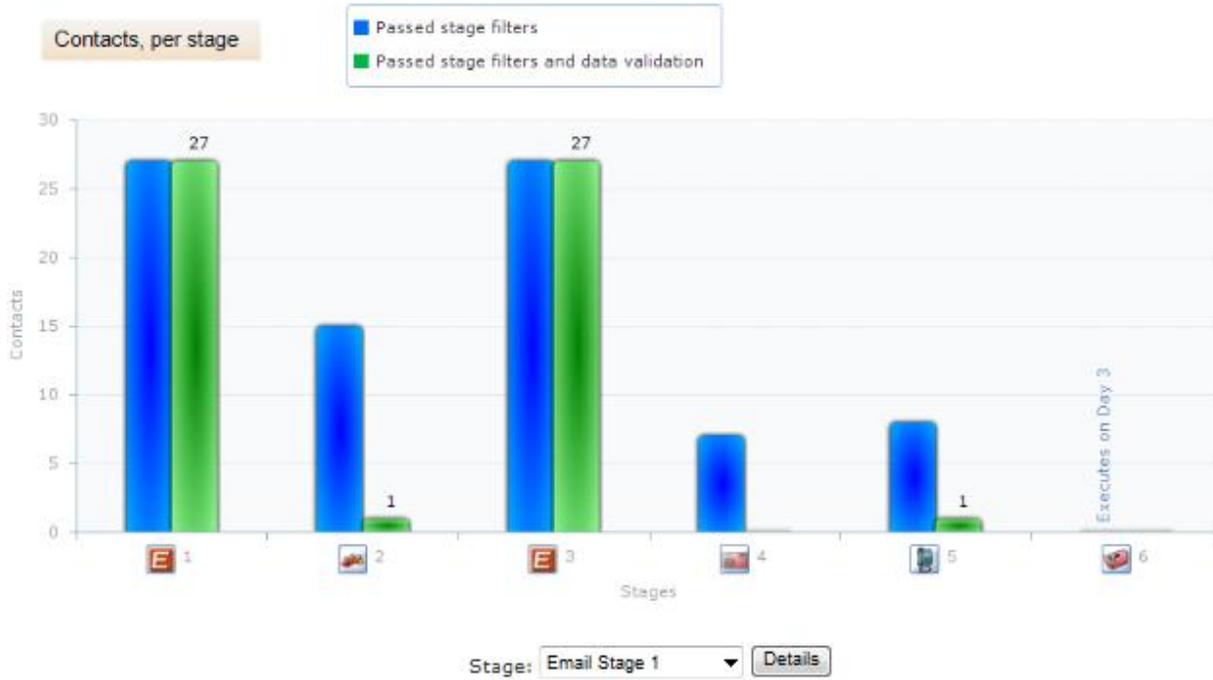
- i. **All Contacts in Drip Marketing List** – affects all contacts in your list.
- ii. **Contacts from previous Email stages, matching Response** – affects contacts that Opened, clicked, did not open, or a combination of each from all previous Email stages.
- iii. **From stage** – affects contacts who opened, clicked, did not open, or a combination of each from a particular Email stage or Call List. (*Note: if a Call List stage is selected, contacts can qualify based on Call List Actions.)

5) Options – Selecting the Contact list Sync is desired prior to execution checkbox sets a reminder to sync your contact data with this Drip Marketing Campaign. This reminder can be seen on the Drip Marketing Campaign Manager, and in the database plug-in you are using (ACT!, SalesLogix or Sage CRM).

6) Email Notification – Email notifications can be sent prior to stage execution, after stage execution, or both. Enter the date you would like the notification to be sent on, the email address, subject and body.

Drip Marketing Reports

To view Drip Marketing Reports, click the Reports button on the Campaign you would like to view.



Drip Marketing Preferences

Drip Marketing Preferences allows you to set preferences for the features you use most often. Preferences are accessible from the Drip Marketing Campaign Manager. Here you can set preferences for: Notification Settings, Export list stage, Alert stage, Letter stage, Postcard stage, Fax stage and "Telemarketing stage". If these preferences are set, they will appear as default settings while creating the appropriate stages within a Drip Marketing Campaign.

Press the Save button to save changes.

Swiftpage E-marketing Drip Marketing Campaign Preferences Save Campaign Manager

Notification settings

Send pre-stage execution notify days before stage

Send stage execution notify days after stage

Default email:

Activity reports

Default Email address for Activity reports:

Save changes to your Drip Marketing preferences

Export list stage

Default Export to Email address:

Default message:

Review stage

Default Review message Email Address:

Default Review message:

Letter stage

Set the default Email Address of Letter Printer

Vendor

Manual

Send test email with attachment: Send

Default Mail Merge Letter

[Vendors](#)

Postcard stage

Set the default Email Address of Postcard printer

Vendor

Manual

Send test email with attachment: Send

Default Postcard Template

[Vendors](#)

Fax stage

Set the default Email Address of Fax company

Vendor

Manual

Send test email with attachment: Send

Default Fax Mail Merge letter

[Vendors](#)

Telemarketing stage

Set the default Email Address of Telemarketing company

Vendor

Manual

Send test email with attachment: Send

Default Telemarketer Script

[Vendors](#)

List Viewer

The Drip Marketing List Viewer allows you to view different lists within your Drip Marketing Campaign . Use the List Viewer to:

- 1) View all contacts in the Drip Marketing Campaign
- 2) View the contacts in each stage that has executed
- 3) View the last stage that has executed with a particular contact in it
- 4) Forecast the contacts that will be in a stage that has not yet executed
- 5) Email any of the above lists to a specified email address.

Drip Marketing Campaign List Viewer Campaign Manager

Campaign: **Anchor Date Example 1** Stages: **All**

<input type="checkbox"/>	Name	Email	Last Stage	Added On	Added By	
<input type="checkbox"/>	Brady, Wayne	wbrady@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Farley, Chris	cfarley@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Harding, Nick	nharding@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Johnson, Brian	bjohnson@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Miles, Nate	nmiles@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Seignfield, Jerry	jseignfield@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Smith, Chris	csmith@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Tucker, Chris	ctucker@swiftpageemail.com		11/9/2011	Test	Details
<input type="checkbox"/>	Word, Jason	jword@swiftpageemail.com		11/9/2011	Test	Details

 Email current List View Included Contacts by Stage Page 1 of 1 Page: Total: 9

To:

Stage:

Sync Contacts with the List Manager

The following section will detail how to use a List Manager Group to update your Drip Marketing Campaign's Contact List.

- 1) From the E-marketing Portal, click List Manager.

Swiftpage

Connect



2) Click Update Drip Marketing.

Swiftpage List Manager

[Home](#) [Contacts](#) [Groups](#) [List](#) [Send Email Blast](#) [Update Drip Marketing](#)

Manage Contacts [New Contact](#) [Current Contact Details](#) [Current Contact Notes & History](#) [Current Contact Group Info](#)

Current Filter:
Group Name: "test3"
Rule: The contacts that are in the group (???)
Contacts: 9
[Advanced Filter Actions >>](#)

Select a Filter
Filter by Group:
 test3
 Use All Contacts with a Field Value:
Email Address Contains

3) Select Connect to Group or Sync Selected.

Swiftpage List Manager

Home Contacts Groups List Send Email Blast Update Drip Marketing

Update Drip Marketing

Select a Drip Marketing Campaign

	Campaign	Hosted Group	Status	Contacts	SendAs	Sync	Sync by	Next Stage	Results
<input checked="" type="radio"/>	Anchor Date Example 1	test3	Suspended	9				11/12/2011	No
<input type="radio"/>	Anchor Date Example 2	Test Group 2	Active	38				11/12/2011	Yes
<input type="radio"/>	Anchor Date Example 3		No Contacts	0	Test				No
<input type="radio"/>	Calendar Example	All	Complete	36	Test				Yes
<input type="radio"/>	Duration Example		Build	0	Test				No

Connect to Group Sync Selected Campaign Manager

4) After selecting a Group, click Connect.

Swiftpage List Manager

Home Contacts Groups List Send Email Blast Update Drip Marketing

Connect to Group

Select a Group to connect to the Drip Marketing Campaign: Anchor Date Example 1

All

Connect Cancel

5) Click Finish Sync.

Swiftpage List Manager

Home Contacts Groups List Send Email Blast Update Drip Marketing

Drip Marketing Sync

9 Contacts (Group: test3)
Were compared to those in the Drip Marketing Campaign: Anchor Date Example 1
The comparison results are below. Review the actions that will be taken , then press "Finish Sync".

Result Type	Count	Action
Matched	9	Update
New	0	Add
Missing	0	Remove

Finish Sync Cancel

6) The Swiftpage List Manager will confirm that your contacts have been updated.

Swiftpage List Manager

OK Your Drip Marketing campaign has been updated. Added: 0, Updated: 9, Removed: 0, New Total in List: 9

OK