



Drip Marketing Tab – Automate Your Business

In this help document, you will learn the following:

- 1) [What is Drip Marketing?](#)
- 2) [Features Available within the Drip Marketing Tab](#)
- 3) [Drip Marketing Scenarios](#)

What is Drip Marketing?

Drip marketing tools enable you to create sequential marketing messages and run your campaigns automatically.

Automatic Delivery

Drip Marketing allows for you to create multi-step marketing plans and then drop segmented contacts into a campaign specific to their preferences. You can create a Drip Marketing campaign with E-mail, Call Lists, Postcards and more, for delivery over time without any intervention from you. You just let your campaign run without worrying if and when your marketing messages are delivered.

Conditional Actions

Drip Marketing blends the simple functionality, such as the ability to automatically send a sequence of marketing messages to a contact who fills out a form on your website, with intelligent technology that will send different messages to contacts based on their previous actions. For example, send a postcard to those that did not open the previous E-mail – automatically!

Anchor, Calendar or Duration

There are three types of Drip Marketing campaigns that differ based on the way the stages of the campaign are sequenced.

- Anchor Date campaigns are used for campaigns that are leading up to or following a specific date. Anchor Date Campaigns are perfect for driving contacts to your events, a new product launch or leading up to a trade show.
- Calendar campaigns offer the most freedom with stages because each stage is scheduled based on a specific calendar date. Calendar campaigns are useful for sending newsletters, for example on the first day of every month.
- Duration campaigns are the most robust of the Drip Marketing campaigns. These campaigns are designed to keep in touch, and are sequenced based on days since the contact was added to the campaign. Duration campaigns are great for retaining current customers and introducing them to other product offerings.

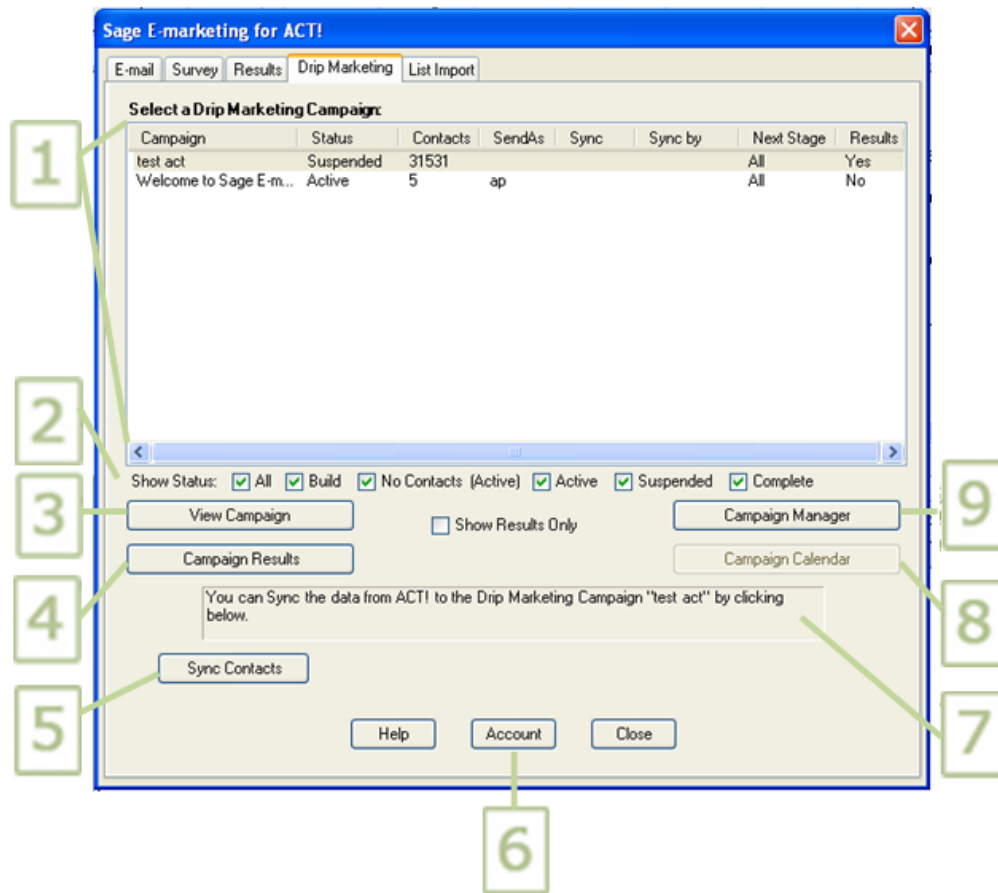
And the best part, all of this is done automatically.

Now Do It!

1. Go back to ACT!
2. Click on the Sage E-marketing for ACT! icon on your toolbar
3. Click the **Drip Marketing** tab
4. Click **Campaign Manager** to create a new campaign
5. Click **New Campaign**
6. Fill in required fields and select type of campaign
7. Start adding Stages

Features Available within the Drip Marketing Tab

The following picture shows Sage E-marketing for ACT!, numbered with corresponding explanations.



1. **Drip Marketing Campaigns** – This window lists all of your Drip Marketing campaigns along with specific details about each Drip Marketing campaign. Each campaign has a “Current Status”, a number of “Contacts” in the campaign, the Swiftpage UserID that is being “Sent As”, if a “Sync” is desired or required with the associated “Sync Date”, the date that the “Next Stage” will execute, and if the drip campaign has any “Results” available to download to your ACT! database.

Campaign – Shows the Name of each Drip Marketing campaign.

Status – Shows the status of the Drip Marketing campaign. Status types are described below.

Contacts – Gives the number of contacts that are in the Drip Marketing campaign.

Send As – Shows the Swiftpage UserID associated with that drip Marketing campaign.

Sync – Shows “Desired” or “Required” if set in the Drip Marketing campaign. These options prompt you to “Sync your data”, but do not automatically perform the sync for you.

Sync By – shows a future date to remind you to sync your data.

Next Stage – Shows the date of the next Drip Marketing Stage that will execute.

Results – Contains a “Yes” or a “No” depending on whether or not data is available to download into your ACT! database. Data includes: “Opens”, “Clicks”, “Bounced”, “Invalid”, “Opt-Outs” and “Duplicate” E-mail addresses.

2. **Show Status** – Allows you to view Drip Marketing campaigns of a certain status. The status types are listed below:

All – Shows all of the Drip Marketing campaigns, regardless of their current status

Build – The Campaign is currently in an editable stage and has not been launched. Contacts cannot be Added or Removed, and Sync is unavailable while in this state.

No Contacts (Active) – The campaign has been launched. However, contacts have not yet been added. The campaign will continue to execute, but zero contacts will be affected. When a Campaign is in this status, you can add contacts, using the Sync Contacts button.

Active – Campaigns are running.. Stages execute based on the date or day on which they are setup to execute. While in this status, contacts can be added or removed, and data can be synced.

Suspended – Campaigns can have contacts added or removed, and data can be synced. However, stages will not execute. The campaign must be re-launched in order to execute stages.

Complete – All stages within the campaign have executed. No stages are left to execute. If you edit a completed campaign, it will revert back to the “Build” mode.

3. **View Campaign Button** – Click this button to go online and view all of the stages within the selected Drip Marketing campaign.



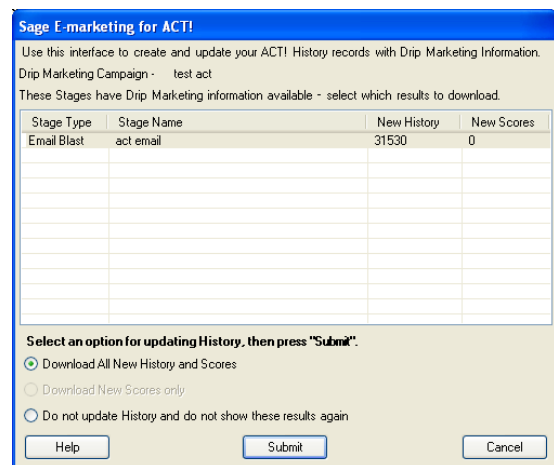
4. **Campaign Results Button** – This button gives you three options for updating your history in ACT! from Drip Marketing. You can update your contact's history record with the E-mails blasts sent through Drip Marketing, as well as updating your contacts scores (Opens, clicks, bounces, opt-outs, duplicates and invalids). Drip Marketing stores Stage information in ACT! History records, allowing you to keep all of your information about your contacts in your ACT! database.

When downloading drip marketing campaign results, there are three options for updating the history in your ACT! database:

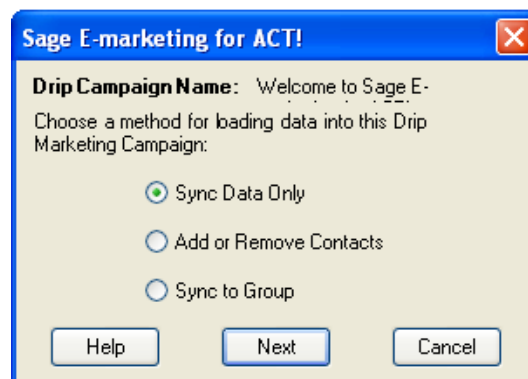
Download All New History and Scores – This option will create new history records for each contact that qualified for the E-mail stage. New scores are available daily and if any are available, they will also be downloaded.

Download New Scores only – New scores apply only to E-mail stages. Scores are give to contacts based on opens, clicks, bounces, opt-outs and more. New Scores are available daily to download into your ACT! history.

Do not update History and do not show these results again – Choose this option if you do not wish to update your ACT! history and do not want to see these results again.

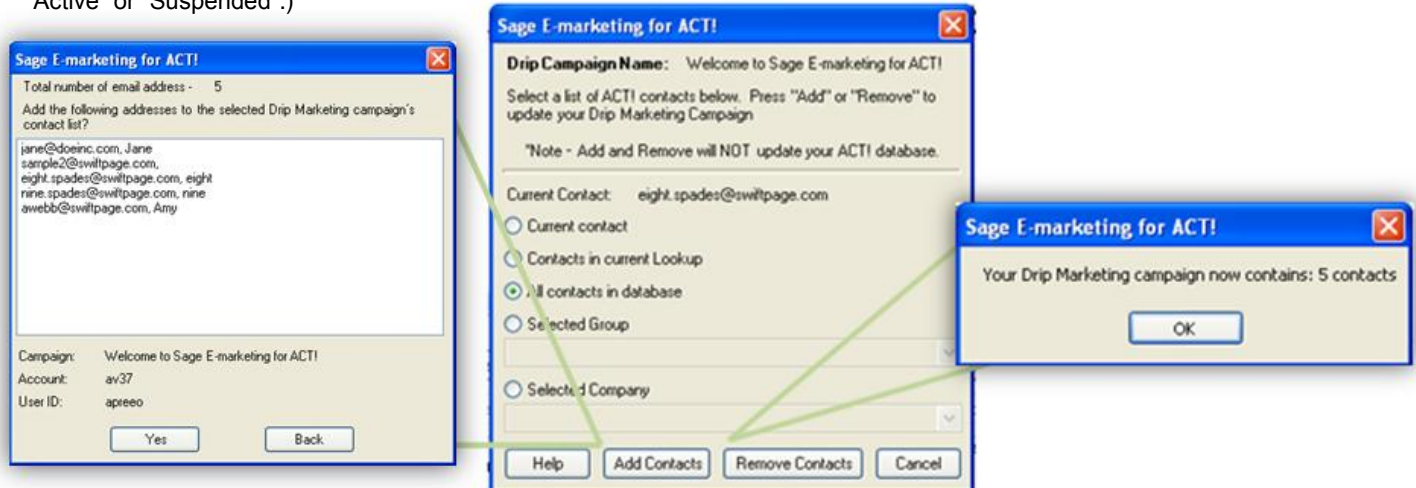


5. **Sync Contacts Button** – This button gives you three choices:



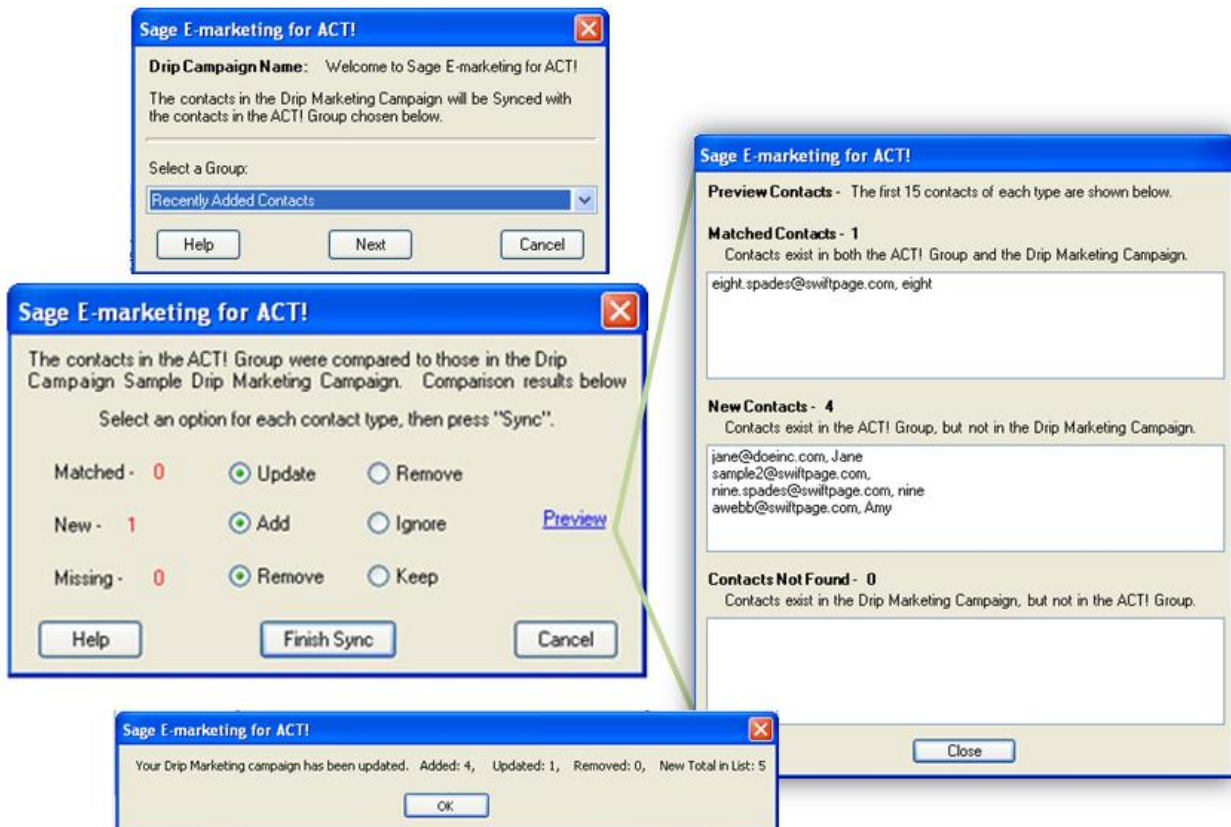
Sync Data Only - Syncs both mail merge data and optional data fields. Mail merge data refers to any mail merge fields located in the E-mail templates used in that particular Drip Campaign. Data fields refer to any fields being used for a "Database Compare" (which can be set in each Stage). This option is only available after contacts have been added to your drip campaign using "Add or Remove Contacts" or "Sync to Group" When you select the option to Sync Data Only, you will see the following confirmation screen. Clicking OK replaces the data in your online Drip Campaign with data in your ACT! database. This is a one-way sync.

Add or Remove Contacts - This option allows you to add contacts to or remove contacts from your Drip Marketing Campaign. You can add/remove your current contact, a contact in the current lookup, all contacts in the database, a selected group or a selected company. (Add and remove functions can be performed at any time as long as your drip campaign is "Active" or "Suspended".)



Sync to Group – To use Group Sync, select the group you want to sync with your Drip Marketing Campaign. Drip Marketing "Group Sync" is a very powerful feature that allows you to keep exactly the same contacts in your Drip Marketing campaign as are in your ACT! Group. This option "syncs" the contacts in your Drip Marketing campaign with the contacts in any of your ACT! groups. Using "Group Sync" ensures that the contacts in your ACT! Group are always in your Drip Marketing campaign. This is especially useful for ACT! dynamic groups. For example, you may have a "Dynamic Group" in ACT! that is always changing. If you want to market to this group and only this group, then using Group Sync will ensure that your Drip Marketing campaign only contains these contacts.

When you select this option, you will see the following screens:



"Group Sync" compares the contacts in your ACT! Group to the contacts in a drip marketing campaign. Once the comparison is finished, you can see how many contacts "Matched", are "New", and are "Missing".

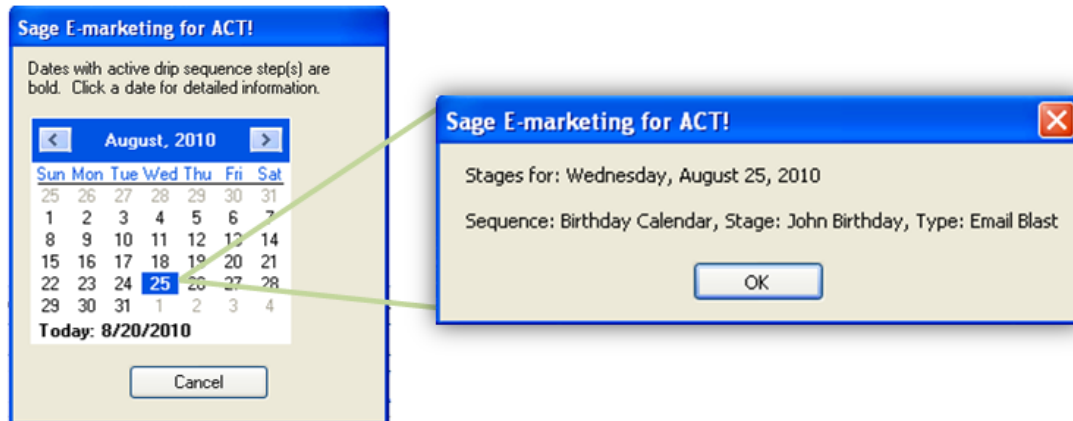
"Matched" – Contacts exist in the ACT! Group and in the Drip Marketing Campaign

"New" – Contacts exist in the ACT! Group, but not in the Drip Marketing Campaign

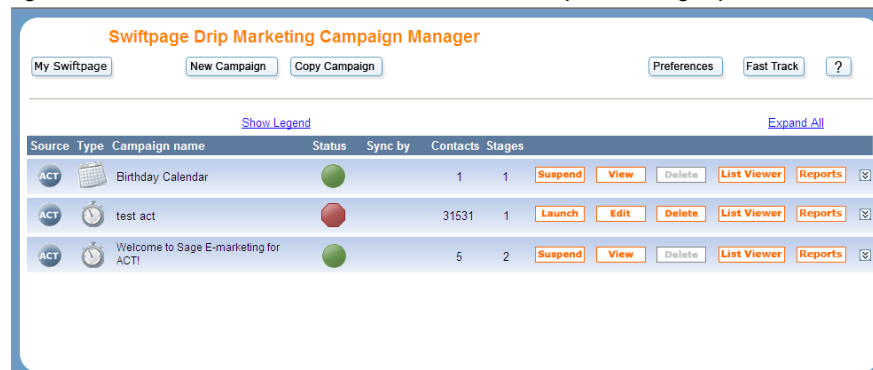
"Missing" - Contacts exist in the Drip Marketing Campaign, but not in the ACT! Group.

Clicking the "Preview" button, allows you to view the first 15 of each type of contacts.

6. **Account Button** - The Account button gives you access to your account information. Click here to upgrade your account, cancel your account or add a User ID.
7. **Sync Data Status Screen** – If you have Platinum level Drip Marketing, and use the Alert stage to create an automatic campaign suspend (before data has been synced), this window gives you the possibility of clearing the suspend process. To stop the automatic suspend from occurring, press the “Clear Pending Suspend” button.
8. **Campaign Calendar** – This button gives you a Calendar view of the Drip Marketing Stages that are set to execute on specific days of the month. Click the bold dates to see which Drip Marketing stages will execute. Note: You must sync contacts before button is functional. See the following images:



9. **Campaign Manager** – This button takes you online to the Drip Marketing campaign Manager screen. The Campaign Manager allows you to view all of your Drip Marketing campaigns, and edit, launch or suspend any of those campaigns, view the contacts in each list, and view the Drip Marketing reports.



Drip Marketing Scenarios

Drive Contacts to Your Event

Automatically: Planning an event is a lot of work. Drip Marketing campaigns will help you drive registrations, ensure attendance and receive post-event feedback so you can focus on your presentation.

Entice Registration: Allow your contacts to easily register for your event by including a link to a registration survey in your E-mail or postcard. By creating a List Updater Survey and related fields in your ACT! database, you can continuously keep track of those who have registered for your event. To entice registration, offer an early bird discount or promotional gift for those who register before a specific date, and reiterate that there are limited spots open in your event. Be sure to communicate to your contacts why they should attend your event and keep in contact with them through your Drip Marketing campaign so they do not forget to attend.

Advanced Tip: Cater to your contacts by creating a Transfer Stage in your Drip Marketing campaign so those who have already registered are dropped into a reminder/countdown campaign, while the unregistered contacts will receive the last minute registration offers.

Basic Example







- E-mail 1** – Save the Date
- E-mail 2** – Early Bird Discount Expiring
- E-mail 3** – One Week Left to Register
- E-mail 4** – Last Chance to Register
- E-mail 5** – Post Event Satisfaction Survey

Manage and Convert New Leads

Automatically: You've worked hard and probably spent money to acquire new leads. Lead Management Drip Marketing campaigns will help you turn your leads into prospects, and ultimately customers, with minimum work from you.

Gain Permission: Perhaps you have a new batch of promising leads, but you don't have their E-mail address, or permission to E-mail them. Send these leads a Postcard that grabs their interest by offering them a link to a Whitepaper with information that they will value, such as how they can make their business more successful. Then, use the landing page the Whitepaper is on to your advantage by requiring visitors to fill out a survey before accessing the Whitepaper. Simply ask for their E-mail address, permission to E-mail them, as well as which of your product offerings they are most interested in. Now you have permission to send an E-mail, and you know which product Drip Marketing campaign you should put them in.

Basic Example

-  **Postcard** – Offer webinar sign up and URL to survey
-  **E-mail 1** – Share webinar details
-  **Call List 1** – Webinar follow-up
-  **E-mail 2** – Industry Hints and Tip
-  **E-mail 3** – Hard Sell
-  **Call List 2** – Hard Sell follow-up






Advanced Tip: If a few of your leads have made it through your Drip Marketing campaign without making a purchase, consider inserting a Transfer Stage at the end of your campaign to put them into a nurture campaign. In this type of campaign you provide subtle reminders of your products on a less frequent basis. This enables you to stay in the customer's mind without annoying them.

New Product Launch

Automatically: Your new product is ready for market. Create excitement for its arrival with a Drip marketing campaign containing stages leading up to the product launch, as well as follow-up stages to remind those who have not purchased your great new product what they're missing.

Don't Let Them Miss It: The most important aspect of your Product Launch Campaign is driving your contacts to make a purchase. Your marketing messages should be exciting, and make your contacts want to make their purchase right away. This can be done through the use of buttons with links to make the purchase directly, or to request that a sales person call. You should also be sure to include all of your company's contact information so the contact can get a hold of you directly when ready to make a purchase.

Basic Example

-  **E-mail 1** – New Product Announcement
-  **E-mail 2** – Whitepaper Offer
-  **Call List 1** – Use Survey Results Help Qualify
-  **E-mail 3** – Hard Close
-  **Call List 2** – Based on Last E-mail






Advanced Tip: Add a Transfer stage in your Drip Marketing campaign for those contacts that have made a purchase, so they can be entered into a Customer Retention and Upsell Drip Marketing campaign.

Retain and Upsell Current Customers

Automatically: Your relationship with your customers should not end after they have made a purchase, this is only the beginning. Turn existing customers into your biggest fans and encourage repeat purchases with these Drip Marketing campaigns.

Word of Mouth: The strongest and most credible marketing force is your customer's recommendation; don't let them forget about you. By keeping in contact with your customers and strengthening your relationship with them, you are reminding them why they purchased a product from you. The more you strengthen that relationship, the more likely your current customers are to tell others about how great your product and your company is.

Basic Example

-  **E-mail 1** – Thank you for Purchasing
-  **E-mail 2** – You made the Right Choice
-  **E-mail 3** – Customer Satisfaction Survey
-  **E-mail 4** – Upsell Offer
-  **Call List** – Based on Contact interaction with E-mail 4

Customer Satisfaction: Not only do these Drip Marketing campaigns help you create positive word of mouth, but they can also help save you from negative word of mouth with the use of Customer Satisfaction Surveys. Simply link a customer satisfaction survey to a follow-up E-mail and have your survey results uploaded into your ACT! database. Then transfer your dissatisfied customers into a new Drip marketing campaign with a Call List to follow-up and try to save your relationship.

Advanced Tip: Be sure not to try to upsell your customers right away. Manage your relationship with them first, then offer them thoughtful insights into what you think they would like.