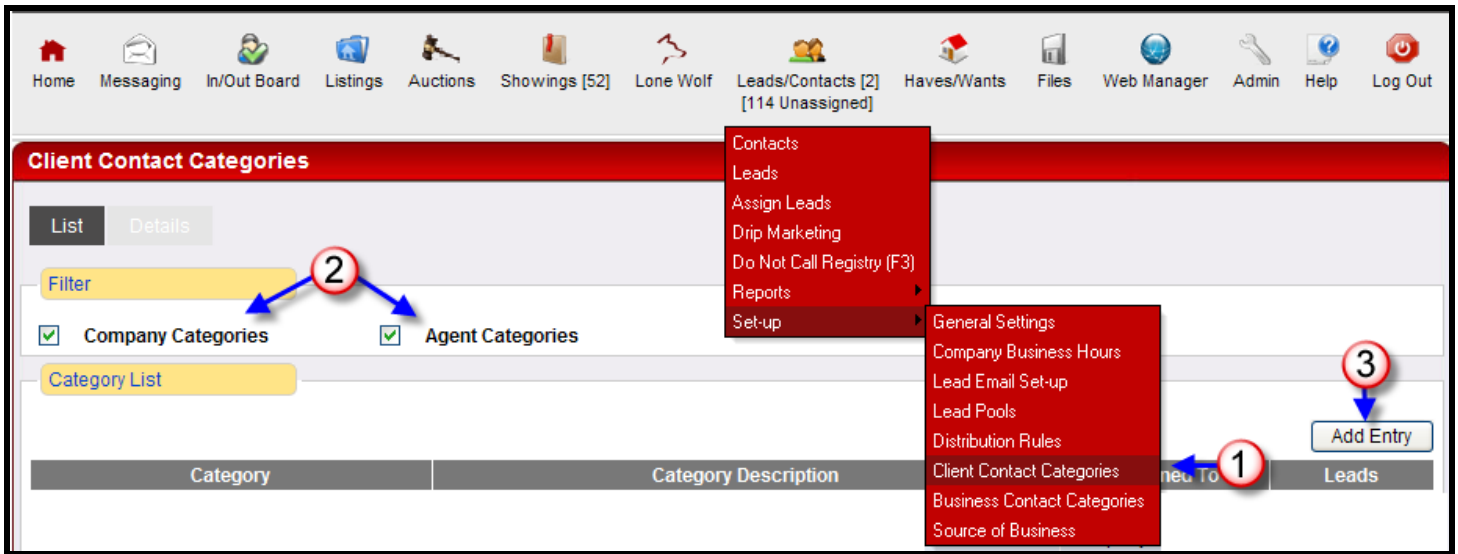


# Drip Marketing

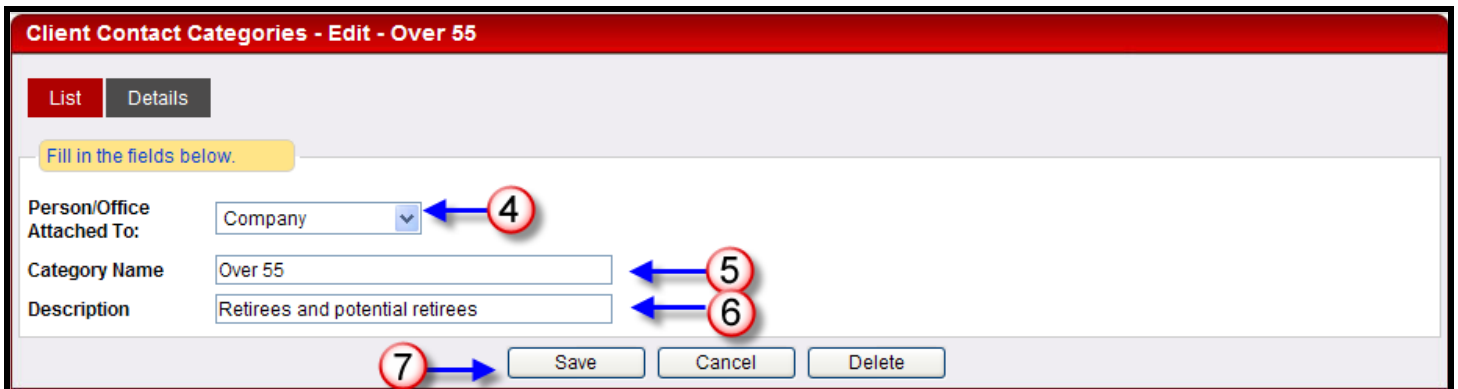
The Drip Marketing module will allow you to create customized marketing materials and campaigns that can be directed towards leads from specific contact groups (categories) or our new Source of Business field.

**Step 1:** Set up the contact categories that you would be targeting with marketing campaigns (example: Buyers, Sellers, Investors, Retirees, etc.).

1. Select Leads → Setup → Client Contact Categories
2. Categories can be created be utilized by both the agents and the company or can be created to be specific for an agent or available to the entire company. The default Client Category is “Web Lead”
3. Select Add Entry



4. Select the company, agent or office to make the contact category available to.
5. Give the category a name.
6. Describe the category (i.e. who would be a part of this marketing campaign).
7. Select Save





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**Step 2:** Create the Sources of Business you may also use for a Drip Marketing Campaign.

1. Select Leads → Setup → Sources of Business
2. Select Add Entry. The defaults include; “Web Lead, Manual Entry, Imported Lead”

Enter a name for the business source and save. When a lead is accepted or manually created, the agent will have the ability to add or edit the contact category and/or the source of business for the lead, gearing the lead for specific Drip Marketing campaigns. **Note:** Leads that are generated from Global Wolf websites will be given a category and source of business of Web Lead but can be changed by the agent accepting the lead. Imported Leads will have a category of Web Lead and source of business of Imported Lead.

**Step 3:** Set up Drip Marketing Letters:

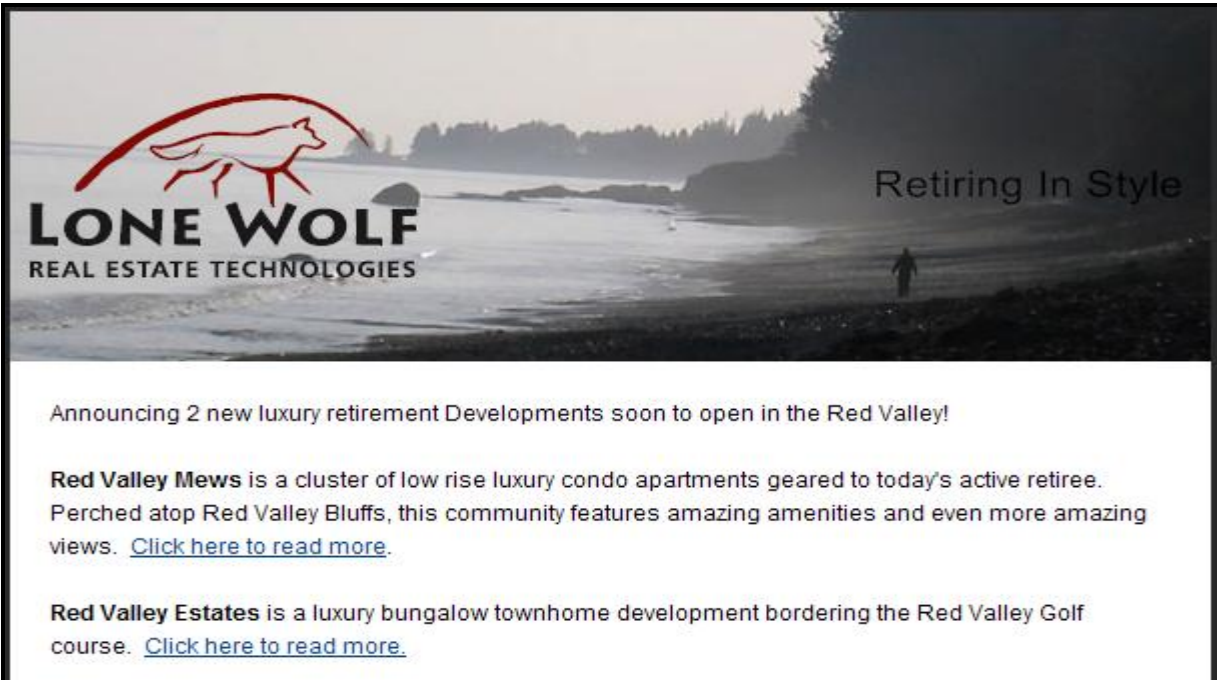
1. Go to Leads → Drip Marketing
2. Select Letters
3. Select Add Entry to create new letter.
4. Select a template for your campaign. Clicking on any template will display a larger version at the right.
5. Select Next.
6. Give your Letter a name
7. Enter a title that will become the subject of the email received by your contacts
8. Select who can use this letter (i.e. is the letter specific to an office, an agent or for administrative use only). Select Next to move to the next step in the wizard.

9. The next step is to create the header of your letter. Begin by selecting the green arrow to the right.
10. Retain the company logo as viewed on the screen or upload your own logo by selecting Change Logo and browsing your computer. Once you have made your selection, hit the green arrow to the right to continue
11. Select your background color and/or image. When selecting an image, scroll through the preloaded backgrounds or click Upload Now to upload your own personal background image.
12. Select the green arrow to the right to continue
13. Enter the text for your custom header
14. Select the Text Color
15. If you are done creating the header **click the Next button** to continue. If you want to make further changes click the green arrow to the left to review the header
16. Create the Body of the email - Be creative! Use the Icons that allow you to link to outside sources or web content on the office or agent websites for Global Wolf clients. Add images that you have uploaded to the file center. Once you are happy with the body of your letter click Next
17. Select the alignment of your footer (Left, Center, Right)
18. Choose Next
19. Preview your letter. If you need to make any changes, select the back buttons.
20. Save your letter.



# Drip Marketing

Here is our example:



#### Step 4: Set up a campaign for your letter(s)

1. Choose Leads → Drip Marketing → Campaigns
2. Select Add Entry
3. You will be asked what type of campaign do you wish to create:
  - Specific Dates: Letters will be sent out on the exact date (s) you specify at setup.
  - Timeline: Letters will be sent based on the start date of the campaign (i.e. “x” amount of days after the beginning of the campaign)
4. Give the Campaign a name
5. Select who can utilize this campaign
6. Select the first letter to be sent out in the campaign. .
7. Enter the date the letter is to be emailed or the number of days.
8. Add additional letters if required for this campaign.
9. Save.

Letter	Settings	Action
Retirement Communities	Date to send letter: 06/20/2009	✖
Client For Life - Buyers - Letter 1	Date to send letter: 06/30/2009	✖



# Drip Marketing

10. Select the Contacts tab
11. Select Contacts to add specific individuals from your contact list, or specific agents and staff members within the Extranet and/or....
12. Select specific triggers that will generate the email (Sources of Business, Contact Categories, Web Form, agent/staff member status)
13. Select Save

**Campaign - Retirement** ✔ Currently In The Office (Edit)

List Detail **Contacts** Report

**Contacts**

Name	Trigger	
Frank Alse	Manual	
Sam Bishop	Manual	

Page: | 1

**11** Add Contact Add REALTOR®/Staff

**Automatic Triggers**

Type	Specific	
Source of Business	Today's Senior Magazine	
Contact Category	Over 55 (Client)	

**12** Edit Triggers

14. The Reports tab will show you all of the current contacts for your campaign.

NOTE: If you change the contact category or the source of business on an existing client, it may take up to 10 minutes before you see this client added to your campaign.