

Long-Term Drip Messaging

When to Implement:

Long-term top-of-mind strategy. This should be meant to provide value, build the relationship, and position you as the vendor they'll reach out to when needed.

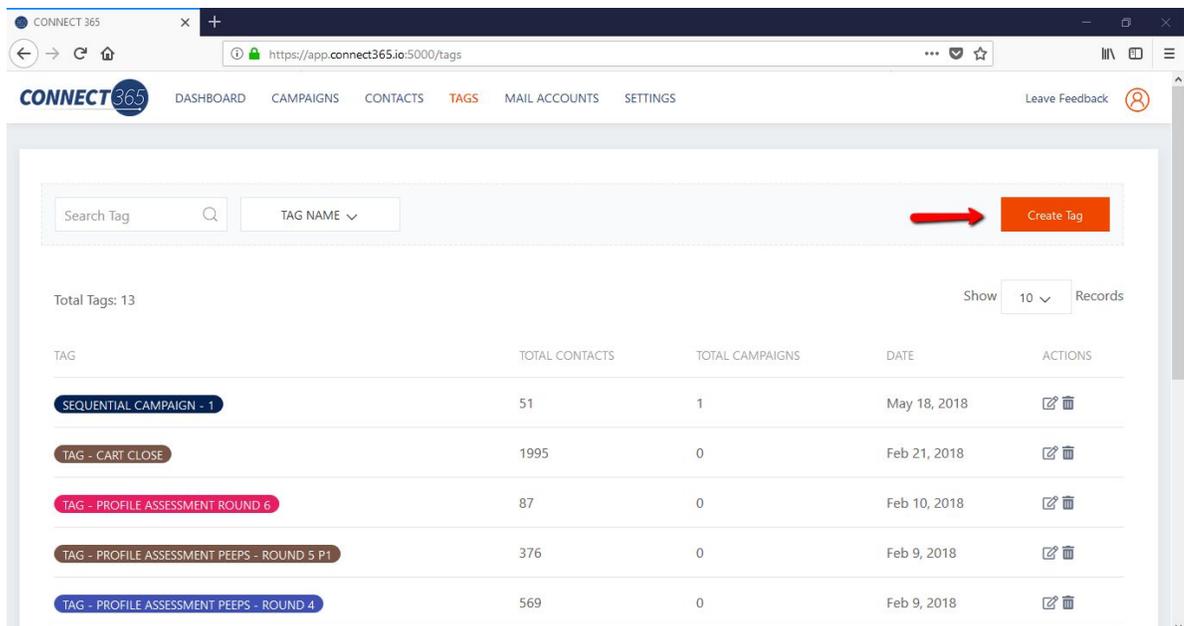
Who is Included:

Prospects that have been through a messaging campaign and declined or ignored the offer to speak. Long-term contacts that you want to stay in front of. Anybody not in a current lead gen, sales or customer onboarding sequence.

Set-up Process:

1. Create a Tag that will organize the contacts intended for this sequence.

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The screenshot shows the 'TAGS' page in the CONNECT 365 application. At the top, there is a navigation bar with 'CONNECT 365' and menu items: DASHBOARD, CAMPAIGNS, CONTACTS, TAGS, MAIL ACCOUNTS, and SETTINGS. Below the navigation bar, there is a search bar for tags and a 'Create Tag' button, which is highlighted with a red arrow. The main content area shows a table of existing tags. The table has columns for TAG, TOTAL CONTACTS, TOTAL CAMPAIGNS, DATE, and ACTIONS. There are 13 total tags, and the table displays 10 records.

| TAG | TOTAL CONTACTS | TOTAL CAMPAIGNS | DATE | ACTIONS |
|---|----------------|-----------------|--------------|-----------------|
| SEQUENTIAL CAMPAIGN - 1 | 51 | 1 | May 18, 2018 | [Edit] [Delete] |
| TAG - CART CLOSE | 1995 | 0 | Feb 21, 2018 | [Edit] [Delete] |
| TAG - PROFILE ASSESSMENT ROUND 6 | 87 | 0 | Feb 10, 2018 | [Edit] [Delete] |
| TAG - PROFILE ASSESSMENT PEEPS - ROUND 5 P1 | 376 | 0 | Feb 9, 2018 | [Edit] [Delete] |
| TAG - PROFILE ASSESSMENT PEEPS - ROUND 4 | 569 | 0 | Feb 9, 2018 | [Edit] [Delete] |

- Enter tag info, choose color and hit “save”.

CONNECT 365 DASHBOARD CAMPAIGNS CONTACTS TAGS MAIL ACCOUNTS SETTINGS Leave Feedback

Create Tag

Tag Name

Tag Description

Color

Preview

MONTHLY DRIP

2. This will be a Scheduled Campaign that you can add new emails or content to as the year progresses.

CONNECT 365 DASHBOARD **CAMPAIGNS** CONTACTS TAGS MAIL ACCOUNTS SETTINGS Leave Feedback

Manage your campaign messages here.

| STEP | SUBJECT | CONDITION | STATUS | ACTIONS |
|------|---|-----------|---|---------|
| 10 | Is this information useful to you? | - | SCHEDULED | |
| 9 | We don't do this very often, but to celebrate X... | - | SCHEDULED | |
| 8 | Here's the issue everyone has... | - | SCHEDULED | |
| 7 | How Brian overcame (insert problem) | - | SCHEDULED | |
| 6 | This affects all of us, but here's my take... | - | SCHEDULED | |
| 5 | Just ASK Ryan Levesque | - | SCHEDULED | |
| 4 | Are you a Freakonomic? | - | SCHEDULED | |
| 3 | Pulling back the curtains on our hiring process | - | SCHEDULED | |
| 2 | Leadership Authority - What Is It? Why You Need It. | - | SCHEDULED | |
| 1 | Serving to sell | - | SCHEDULED | |

3. We recommend putting together a general outline/editorial calendar for the type of message you'd like to send out each month. But since these are scheduled messages intended for the entire segment you've tagged, you won't need to input the message until you approach the send date.

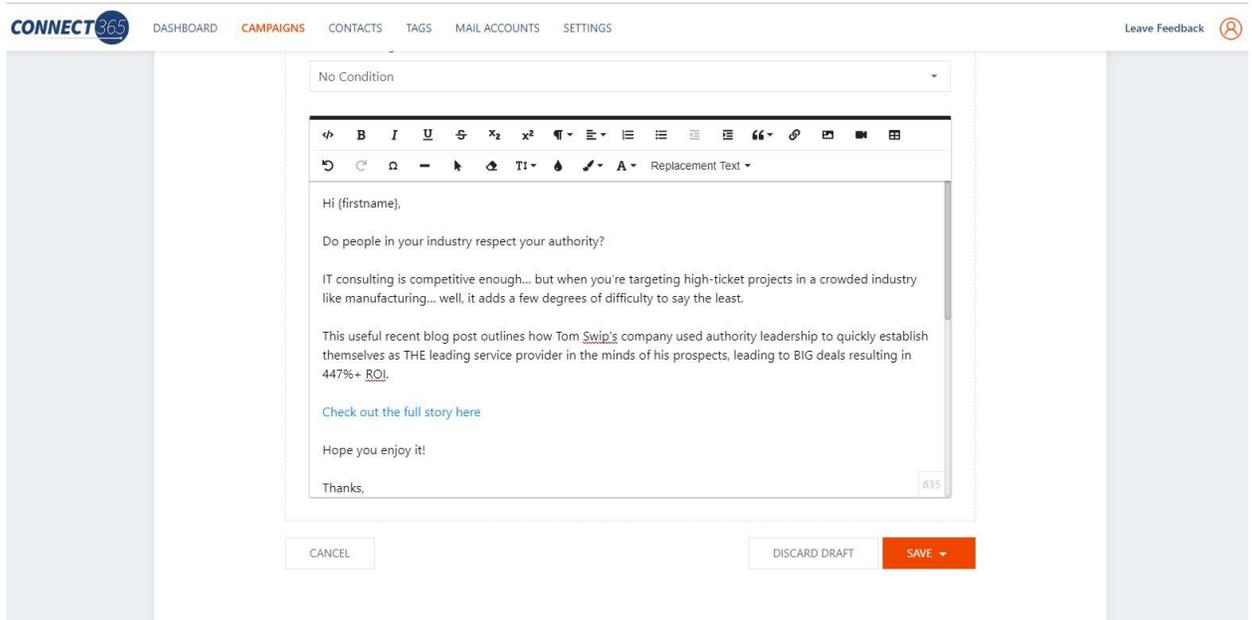
Here's an example message you might include for this type of message.

It is short and sweet and directs the prospect to engage with a blog post case study on our site.

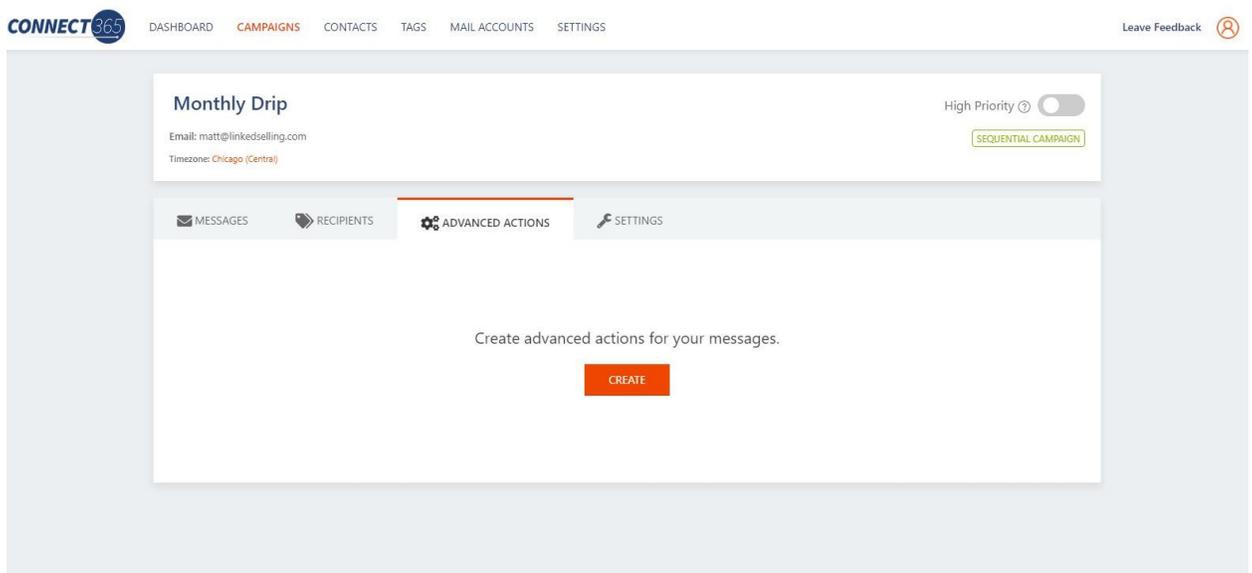
The screenshot displays the 'Monthly Drip' campaign configuration interface. At the top, the navigation bar includes 'DASHBOARD', 'CAMPAIGNS', 'CONTACTS', 'TAGS', 'MAIL ACCOUNTS', and 'SETTINGS'. The main header shows 'Monthly Drip' with a 'High Priority' toggle and a 'SEQUENTIAL CAMPAIGN' button. Below this, a sub-header contains 'MESSAGES', 'RECIPIENTS', 'ADVANCED ACTIONS', and 'SETTINGS'. The central 'NEW MESSAGE' form is pre-filled with the following details:

- Subject:** Leadership Authority - What Is It? Why You Need It.
- Reply:** Send this message as a Reply (in same thread).
- Delay:** 28 Days, 0 Hours, 5 Minutes.
- Condition:** Send this message unless: No Condition.

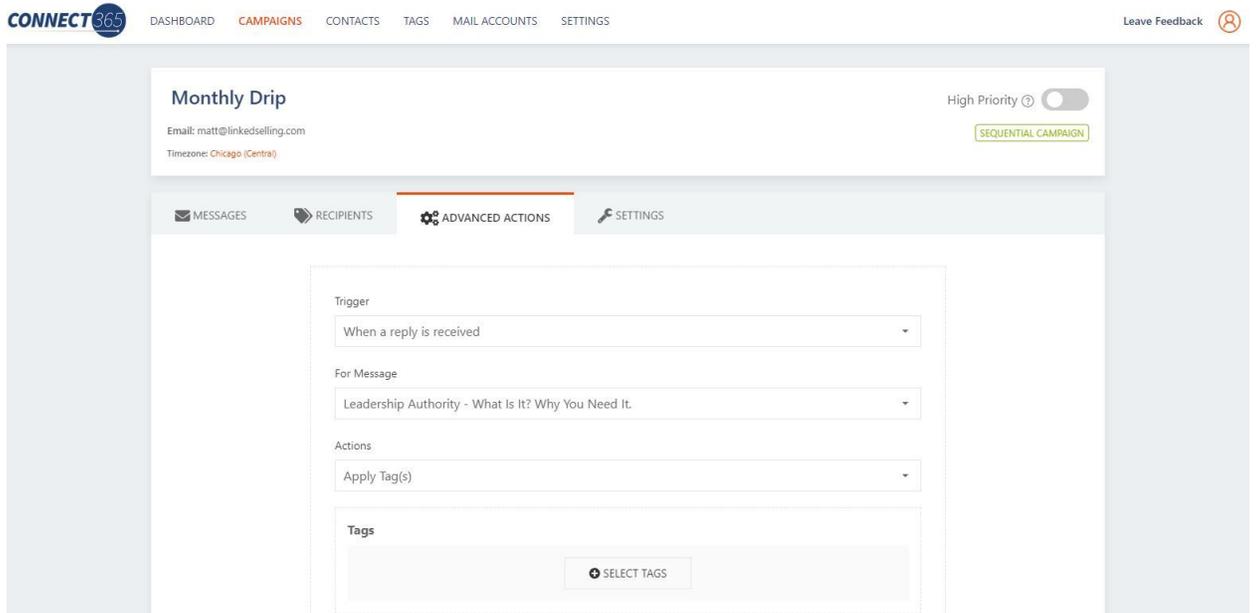
A rich text editor toolbar is located at the bottom of the form, featuring icons for undo, bold, italic, underline, link, unlink, list, and other text formatting options.



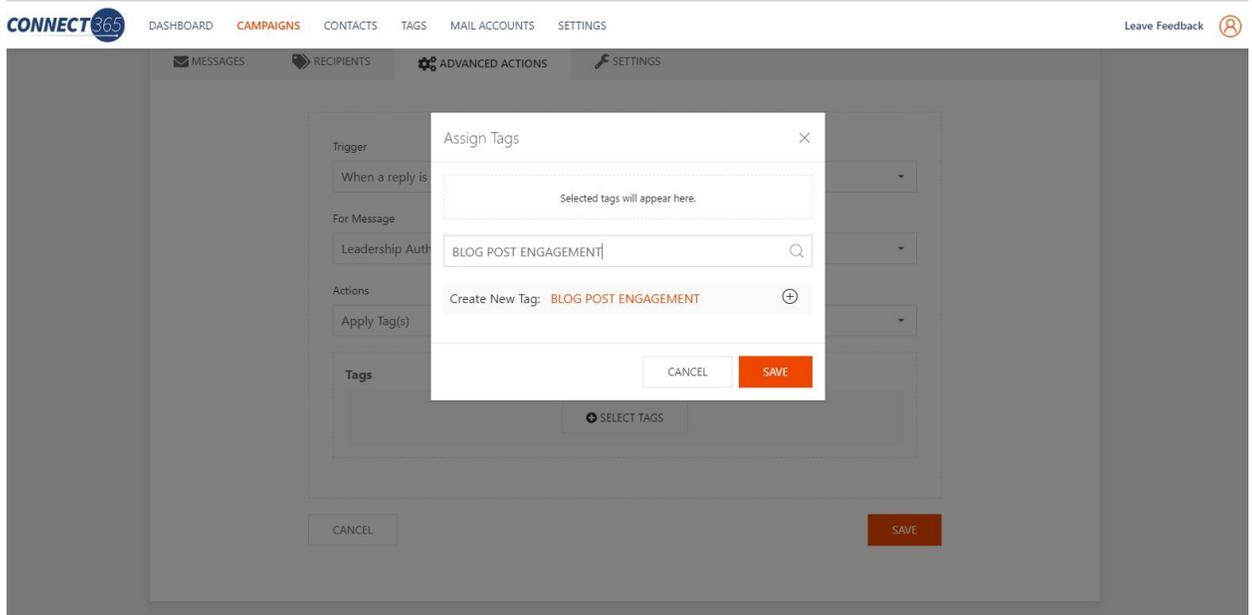
4. Add any advanced actions if you'd like to tag (or untag prospects based on engagement). NOTE: this isn't a requirement, but if you have separate follow-up sequences you want to create for those more engaged this would be a great opportunity to use them.



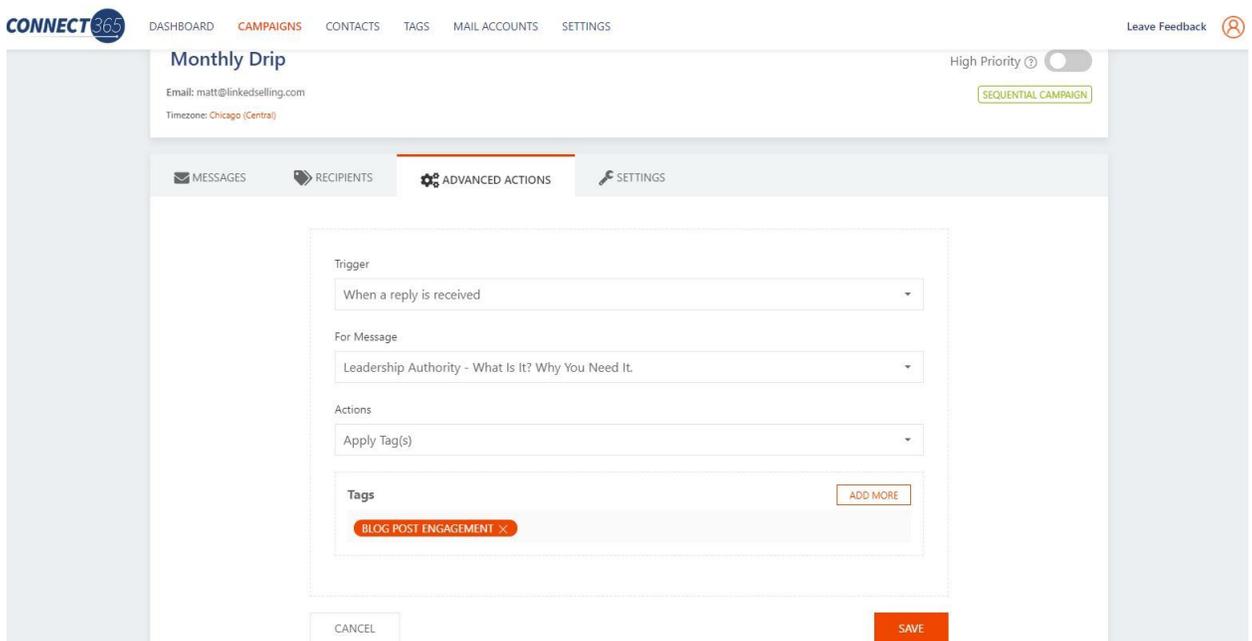
- Click on the Advanced Actions header in your campaign.



- Choose the trigger for the action you want to kickstart the advanced action. (when a reply is received, when an email is opened or when a link is clicked).
- Pick the message it should be in reference to.
- Choose which action it should take. (Apply Tag(s) or Remove Tag(s)).



- Choose the appropriate tag to add or remove.



- Click Save.

Example Layout of a Monthly Drip Campaign

| SUBJ | TOPIC | TIME DELAY |
|---|--|-------------------|
| Leadership Authority - What Is It? Why You Need It. | Link to recent blog post or case study | End of month |
| Serving to sell | An answer to the one challenge all your prospects have (or short answer to an faq about the area of your expertise) - help them solve a problem they have. | ~ 3-4 weeks later |
| Are you a Freakonomic? | Link to a podcast you were featured on or guest post you were mentioned in | ~ 3-4 weeks later |
| This affects all of us, but here's my take... | Link to a industry related article/post with your take on it | ~ 3-4 weeks later |
| We don't do this very often, but to celebrate X... | Seasonal themed offer for 15 min consult call - "We have 3 slots left - would you like one?" | ~ 3-4 weeks later |
| Pulling back the curtains on our hiring process | A look inside our business and how we did something they'd have an interest in doing themselves | ~ 3-4 weeks later |
| Thought I might ask | Link to a survey or just a question in the body of the email | ~ 3-4 weeks later |