



Take
the
lead.



THE MARKETING LAB

How to Best Manage and Organize Ongoing Sales Development Campaigns

What's the best tagging structure? How can I effectively manage who is getting added to my campaigns?

“A goal without a plan is just a wish.”

~ Antoine de Saint-Exupery



What are you looking to accomplish?



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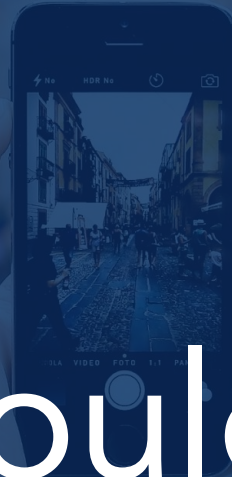
What's your low-hanging fruit?



What's your long-term goal?

Where

Should You
Start?



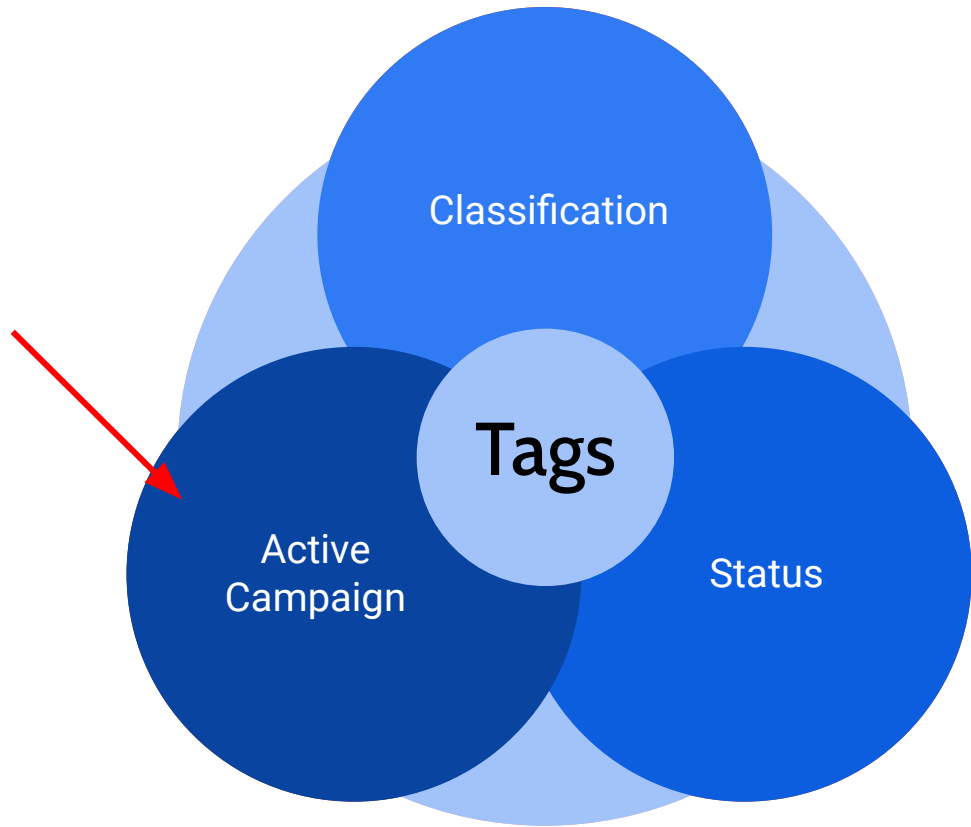


Classification

- Customer Type
- Prospect Type
 - Industry (Mortgage Broker, Lawyer, Fin. Advisor)
 - Location
 - Interests (Opted in for X Webinar, Downloaded Y Case Study)

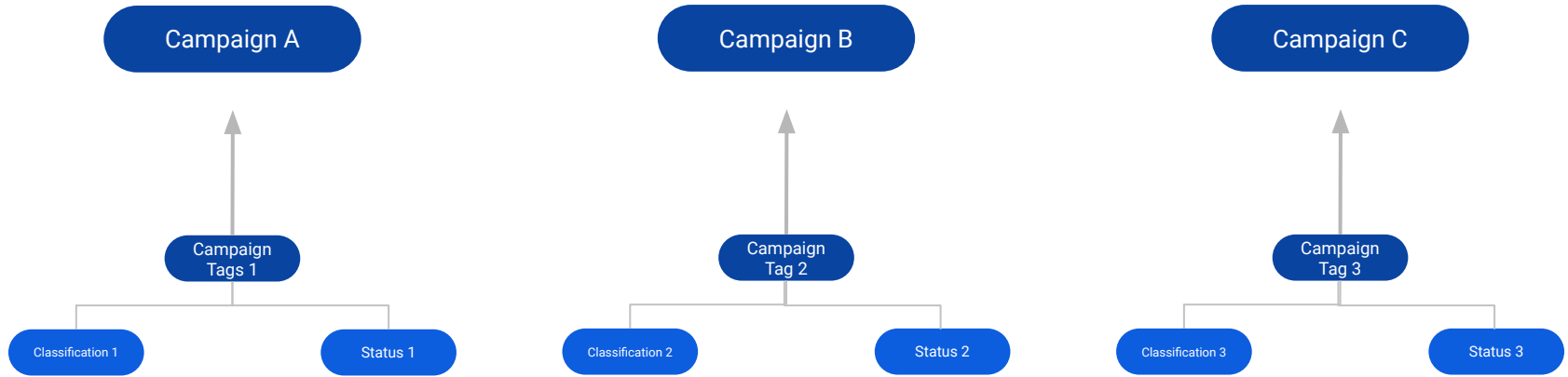
Status

- Completed X Campaign
- Sent Proposal (No Response)
- Unengaged
- Exclude from Follow-Up



Active Campaign

- Controls Who Is Currently in Campaigns (or Been Through)
 - Advanced Actions (more to come)



Active Campaign

- Controls Who Is Currently in Campaigns (or Been Through)
 - Advanced Actions (more to come)
- These are the tags you apply when creating these campaigns.
 - Will add all contacts with this tag into the sequence.
 - If a contact has this tag removed, it will remove them from the follow-up.



First

One core evergreen sequence.

Why?

- Repeatable
- Time Saver
- Consistent
- Gets You to Base Camp

Sequential Campaigns

1. New LinkedIn Connections
2. Optins that Didn't Take Next Step

Length: 10-25 days

Keys to Success: Reusable, Replenishable,
Relevance

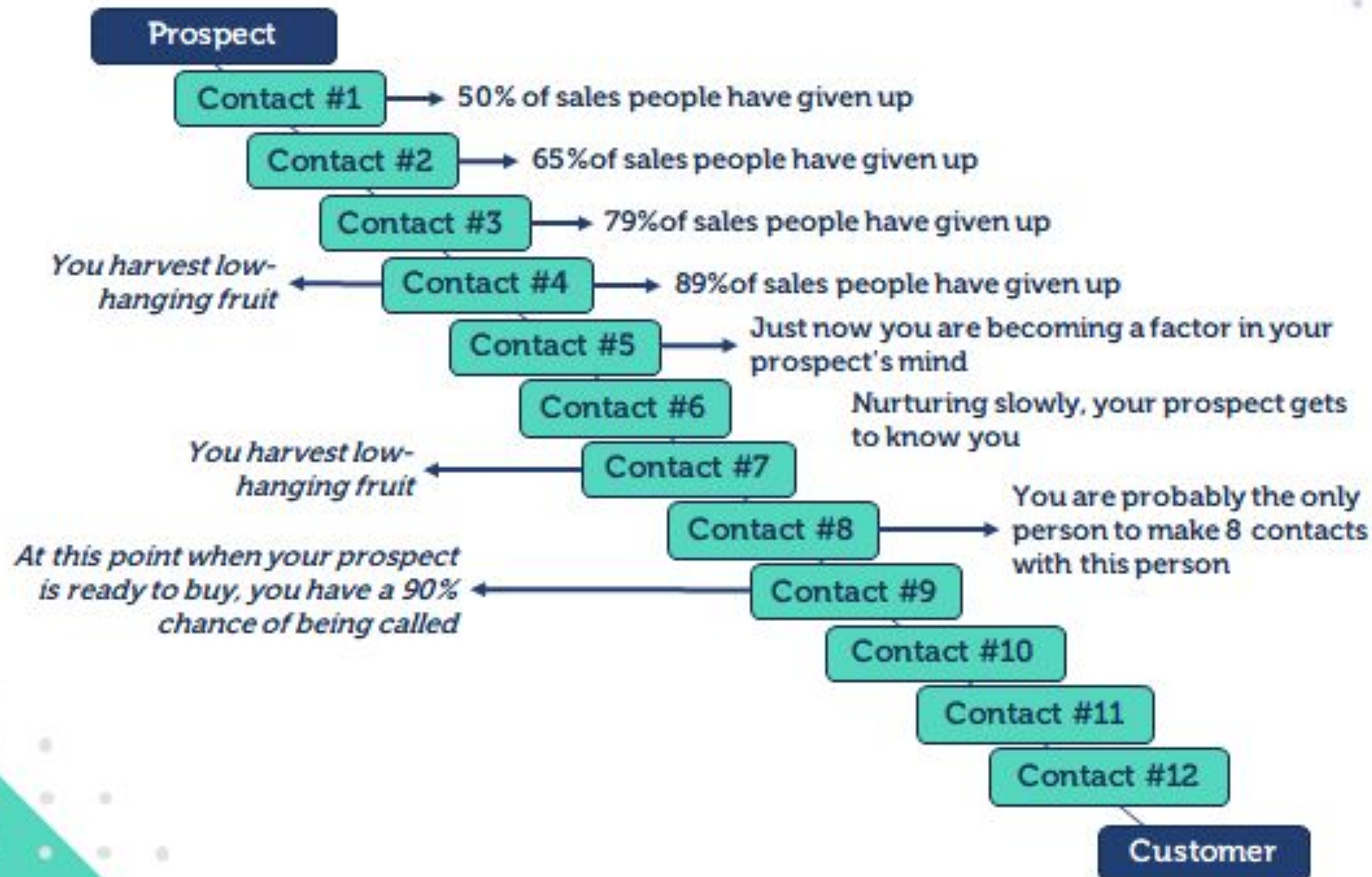
Next


Long-Term Nurture

Studies show

6-8

Brand touchpoints at least to gain awareness with
your prospects.



A person is shown from a top-down perspective, writing in a notebook with a pen. The image is overlaid with a semi-transparent green filter. Several white circles of varying sizes are scattered across the background. On the right side, there is a dark blue circular graphic containing white text.

LOOK OUT!
Expert Tip Coming...

The slide features a white background with several light blue circles of varying sizes. Two circles are in the top-left corner, and three are in the bottom section (one large, one medium, one small).

Use Advanced Actions to Automate Tag Management

Advanced Action Review

Choose a Trigger

Advanced Action Review

Choose a Trigger -> Choose the Specific *Message*

Advanced Action Review

Choose a Trigger -> Choose the Specific Message -> Configure an Action

Trigger

When a reply is received

For Message

Didn't hear back?

Actions

Remove Tag(s)

Tags

ADD MORE

TEST 1 X

CANCEL

SAVE

Trigger

When an email is sent

For Message

Showing a clicked through email

Actions

Apply Tag(s)

Tags

ADD MORE

SUPPORT NINJA TEAM X

CANCEL

SAVE

What About...

Scheduled Campaigns?

Lift 2019 Followup to Non Bookers

High Priority 

Email: [\[redacted\]](#)

SCHEDULED CAMPAIGN

Timezone: **Chicago (Central)**

 MESSAGES

 RECIPIENTS

 ADVANCED ACTIONS

 SETTINGS

Manage your campaign messages here.

Compose

SUBJECT	SEND ON	STATUS	ACTIONS
{firstname}, do you have a minute?	29 Aug, 2019, 01:27 PM	SENT	
[LIFT] Your LinkedIn Rocket Launch Playbook	28 Aug, 2019, 09:32 AM	SENT	



Connect 365 Campaign Management Template

File Edit View Insert Format Data Tools Add-ons Help [All changes saved in Drive](#)



100% | \$ % .0 .00 123 | Arial | 10 | B I U A | [Grid] [Columns] [Rows] [Align] [Text Color] [Background Color] [Filter] [Sum] | ^

	A	B	C	D	E	F	G	H
1			# Contacts Added	Date Added	(est) Last Message Date	Classification Tag	Status Tag	Next Step?
2	Campaign Name:					0		
3	Campaign Tag:							
4	Campaign Type:							
5	Length of Campaign:							
6								
7								
8								
9	NOTE:	<i>Click File -> "Make a Copy" to get a version that you can edit.</i>						
10								

Add more rows at bottom.

+ [Menu] Template Example Example 2

Connect365.io/campaign-management

The Right Volume

1 Start Slow.

2 Let It Breathe.

3 Don't Forget the Long-Game.



On the next:



**The 30-Second Commercial: How to
Communicate the Most Compelling Reason for
Your Prospects to Engage**

Call Held 6/17 at 1 pm (central) with Rob Lime