

CREATING MAILINGS FOR THE EXERCISE

1. First create a new mailing
 - A. Name the mailing **Welcome**
 - B. Save the mailing in the **Main Folder**
 - C. Fill out the rest of the setup tab however you choose
 - D. Use the following code for the content of the **Welcome Mailing:**

```
<table style="width: 100%;" border="0" width="100%"
cellspacing="0" cellpadding="5">
<tbody>
<tr>
<td style="font-family: verdana; font-size: 14pt; font-weight: bold;
color: #ffffff; background-color: #dd5665;">welcome!</td>
</tr>
<tr>
<td style="font-family: verdana; font-size: 9pt; color: #262626;">
<table border="0" cellspacing="0" cellpadding="3" align="right">
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
<p>Dear %%first name%%,</p>
<p>As a new member of our organization, we wanted to take a
moment to thank you!&#160; We value you as a member and hope to
provide you with the best information and resources as possible.</p>
<p>Make sure that you take some time to visit our member portal to
sign in and make the most of your membership. <a
href="http://informz.com/memberportal" target="_blank"
choice="1">Click here</a> to visit the portal.</p>
<p>If you have any questions about your new membership, feel free
to drop us a line <a href="mailto:mcgrogan@informz.com"
choice="2">here.</a></p>
</td>
</tr>
</tbody>
</table>
```

2. Next create a **Member Perks** email
 - A. Name the mailing **Member Perks**
 - B. Save the mailing in the **Main Folder**
 - C. Fill out the rest of the setup tab however you choose
 - D. Use the following code for the content of the **Member Perks Mailing:**

```
<table style="width: 100%;" border="0" width="100%"
cellspacing="0" cellpadding="5">
<tbody>
<tr>
<td style="font-family: verdana; font-size: 14pt; font-
weight: bold; color: #ffffff; background-color: #dd5665;">Perks of
Being a Member</td>
</tr>
```

```

        <tr>
        <td style="font-family: verdana; font-size: 9pt; color:
#262626;">
        <table border="0" cellspacing="0" cellpadding="3"
align="right">
        <tbody>
        <tr>
        <td></td>
        </tr>
        </tbody>
        </table>
        <p>Dear %%First Name%%,</p>
        <p>Are you making the most of your membership?&#160;
As a member, you are entitled to the following perks:</p>
        <ul>
        <li>Ice cream for dinner</li>
        <li>24 hour access to the circus</li>
        <li>Your very own pony</li>
        <li>Free chocolate bars for life</li>
        </ul>
        <p>To read the full run down of what comes with your
membership go to our <a href="http://informz.com/memberperks"
target="_blank" choice="1">Member Perks</a> page.</p>
        </td>
        </tr>
        </tbody>
        </table>
        <p>&#160;</p>

```

3. Create a new Interest called "Interested in learning about perks"
4. Create any style target group that is either comprised of just yourself, a list of internal team members, or a list of fake email addresses. We will be activating this campaign so make sure that you **do not use a list of your real and active subscribers**. Name the list "**Sample Campaign Target Group**" and store it in the **Main Folder**.

EXERCISE : CREATING A CAMPAIGN

1. Go to Marketing Automation > Campaigns > Create
2. Select a Blank Campaign from the Starter Kit
3. Insert the campaign steps:
 - a) Insert a mailing step:
 - i. Name: **Welcome Mailing**
 - ii. Select the Option to Copy a Regular Mailing
 - iii. Folder: Main
 - iv. Mailing: Welcome Mailing
 - v. Click Copy

- b) You will now be prompted to Save the campaign
 - i. Name: **Welcome Campaign**
 - ii. Folder: Main Folder
 - iii. Type: Welcome
 - iv. Contact: your email address
 - v. Goals: No
 - vi. Description: A welcome campaign that will also determine the subscriber's level of interest in member perks.
 - vii. Click Save
- c) You will now be brought to the Campaign Mailing Designer
 - i. Click on the Return tab
 - ii. Connect the **Start** step to the first **Welcome Mailing Step**
- d) Insert a Wait Step
 - i. Name **Wait 3 days**
 - ii. Wait for: 3 days
 - iii. and then continue when it is: Any day
 - iv. and the time is: Any time
 - v. but not before: 01 JAN 2017
 - vi. Time Zone: Eastern
 - vii. Click Close
 - viii. Connect the **Welcome Mailing** step to the **Wait 3 Days** Step
- e) Insert a Decide Step
 - i. Name: **Opened Welcome Mailing?**
 - ii. Matching Subscribers: Opened Mailing in Step: Welcome
 - iii. Click close
 - iv. Connect the **Wait 3 Days** Step to the **Opened Welcome Mailing?** Step
- f) Insert another Mailing step
 - i. Name: **Member Perks Mailing**
 - ii. Select the Option to Copy a Regular Mailing
 - iii. Folder: Main Folder

- iv. Mailing: **Member Perks**
 - v. Click Copy
 - vi. Click Continue in the pop-up
 - vii. Click on the Return tab
 - viii. Connect the Green arrow for the **Open Welcome Mailing?** step to the **Member Perks Mailing** step
- g) Insert another Wait Step
- i. Name **Wait 3 days**
 - ii. Wait for: 3 days
 - iii. and then continue when it is: Any day
 - iv. and the time is: Any time
 - v. but not before: 01 Jan 2017
 - vi. Time Zone: Eastern
 - vii. Click Close
 - viii. Connect the **Member Perks** mailing step to the **Wait 3 Days** Step
- h) Insert a Decide Step
- i. Name: **Clicked on Member Perks link?**
 - ii. Matching Subscribers: Clicked link in Step: Member Perks
 - iii. Link URL contains: <http://www.informz.com/memberperks>
 - iv. Click close
 - v. Connect the **Wait 3 Days** Step to the **Clicked on Member Perks link?** step
- i) Insert a Profile Step
- i. Name: **Move to Interested in learning about perks target group**
 - ii. Set to "Add subscribers to"
 - iii. Check off box for **Interested in learning about perks**
 - iv. Click Close
 - vi. Connect the green arrow for the **Clicked on Member Perks link?** step to the **Move to 2016 Summit Interest Group** step
- j) Insert a Notify step
- i. Name: **Alert Me**

- ii. Email address: your email address
 - iii. Message: A subscriber has shown interest in learning more about member perks
 - iv. Click Close
 - v. Connect the **Move to Interested in learning about perks target group**
 - vi. step to the **Alert Me** step
 - vii. Connect the **Alert Me** step to the stop step
- k) You should now see the red **Errors** tab on the right of the screen
- i. Click on the **Errors** tab to expand it
 - ii. The errors should be pointing out that you have not specified which path a subscriber will take if they do not open the **Welcome Mailing** or if they do not click on the **Member Perks Link**
 - iii. Connect the red arrow of the **Opened Welcome Mailing?** decide step to the **Stop** step
 - iv. Connect the red arrow of the **Clicked on Member Perks link?** Decide step to the **Stop** step
 - v. The **Errors** tab should now disappear.
- l) Click on the Activate Tab
- i. Click on the option to Add Subscribers at Once and Over Time
 - ii. Folder: Main
 - iii. Target: **Sample Campaign Target Group**
 - iv. Start: 01 Jan 2017 2:00 PM
 - v. Stop: 01 Jan 2018 2:00 PM
 - vi. Click Activate