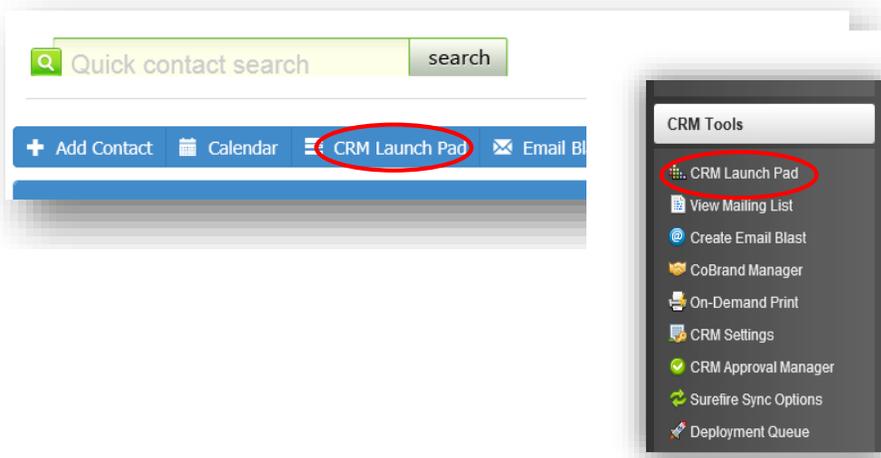


surefire Campaign Builder

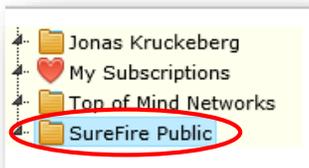
Step One: View a Best Practice, High-Touch Campaign



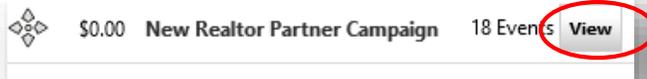
Click **CRM Launch Pad** from the top menu on your Surefire homepage or the right sidebar menu.



Click **Campaigns**.



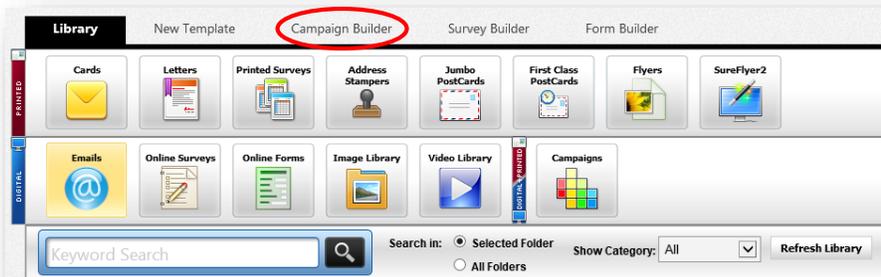
Click on the **Surefire Public** folder, then scroll down to find the **New Realtor Partner Campaign**. Click **View**.



View Events		
■ X Days Out ■ Static Date ■ Dynamic Date ■		
Event Type	Event Name	
1 Email		Post Realtor Meeting Email with Survey
2 Todo Task		Look for Realtor response to survey
3 Todo Task		Handwritten Note
4 Todo Task		Email Quick Quote Forms
5 Phone Call		Phone Call

With the exception of the first event, which is an interactive survey, all events are to-do tasks or phone calls. This is a good example of an effective, high-touch campaign.

Step Two: Build a Campaign



From the CRM Launch Pad, click **Campaign Builder**.

Campaign Name: New Realtor Partner Campaign test
Library: Only for Me
Brief Description: 12-Month New Referral Partner Campaign
Keywords: Separate each word with a comma: realtors
Main Category: (B2B) - Realtor
Specify Time for any emails in this campaign to be sent out: 11am (EST) Morning
Choose Your Campaign Book Theme Color:

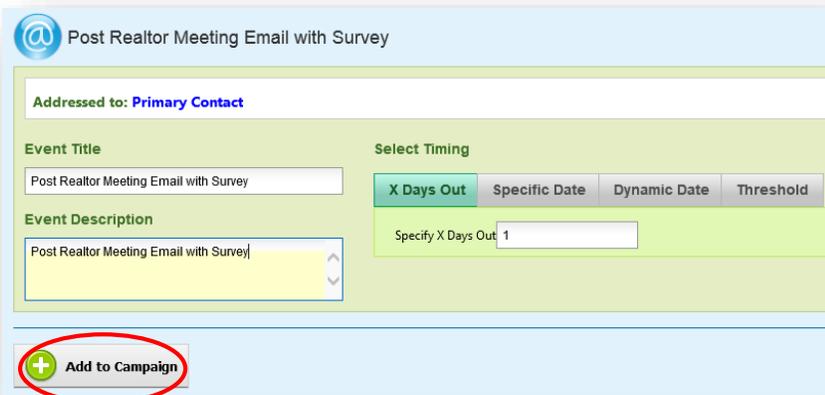
#10623A #147047 #446E44 #62A866 #75AF89 #B0D1BE

Complete the parameters for the campaign.

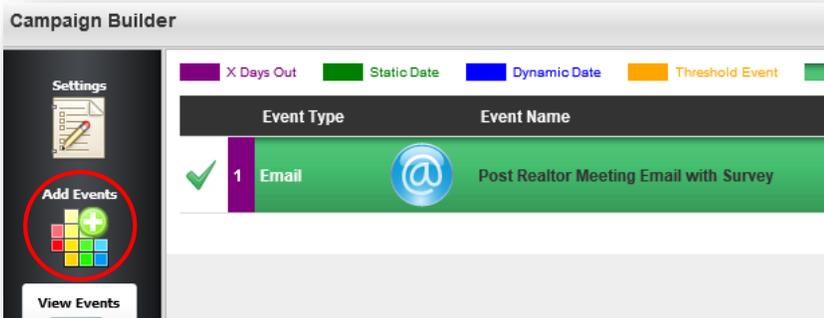
Click on **Add Events** to begin building the campaign.



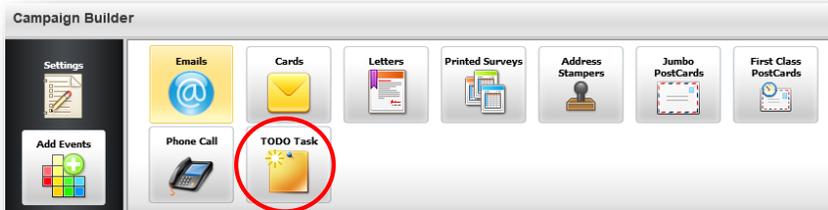
Under the **Emails** tab, in the **Surefire Public** folder, scroll down, then click **Preview/Add Event** next to the **Post Realtor Meeting Email with Survey**.



Select **Timing** by choosing **X Days Out** and entering **1**. Enter an **Event Description**. Click **Add to Campaign**.



You will see the beginning of your list of campaign events. Click **Add Events** to continue building.



This time, click on **TO DO Task**.

Add Event Settings | Preview Event | Select Substitution | Internal Parameters

Add TODO Task Event

Addressed to: **MySelf**

Event Title
Look for Realtor Response

Select Timing
X Days Out | Specific Date | Dynamic Date
Specify X Days Out: 1

Event Description
Look for Realtor response to survey. Respond back with a quick thanks or, if the Realtor does not want to receive emails from you, remove from campaign.]

+ Add to Campaign

Enter an **Event Title** and **Event Description** to remind yourself to look for and respond to the Realtor's survey. Specify 1 day out.

Click **Add to Campaign**.

Add Event Settings | Preview Event | Select Substitution | Internal Parameters

Add TODO Task Event

Addressed to: **MySelf**

Event Title
Handwritten Note

Select Timing
X Days Out | Specific Date | Dynamic Date
Specify X Days Out: 2

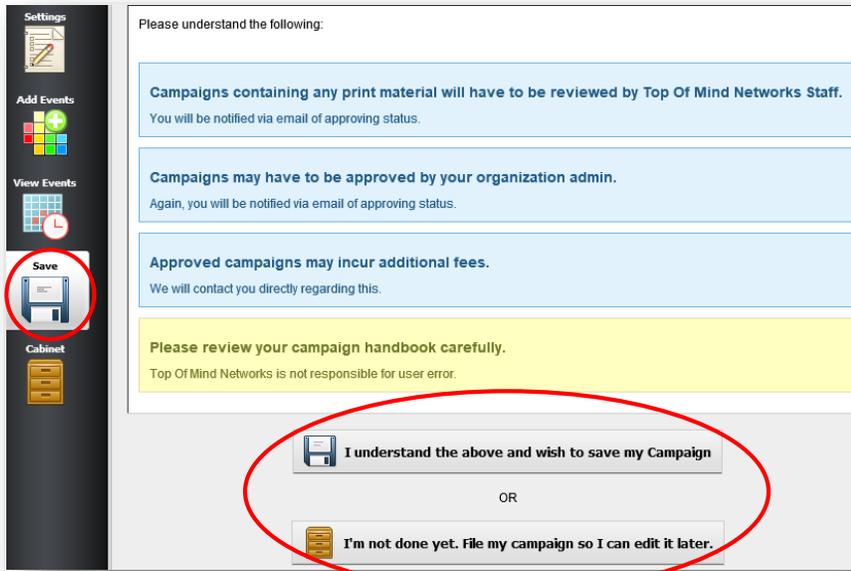
Event Description
Power of the Power Note. Write it before the end of the day.]

+ Add to Campaign

Continuing in the same manner, add another **TO DO Task**, this time as a reminder to write a handwritten note two days after your meeting. Click **Add to Campaign**.

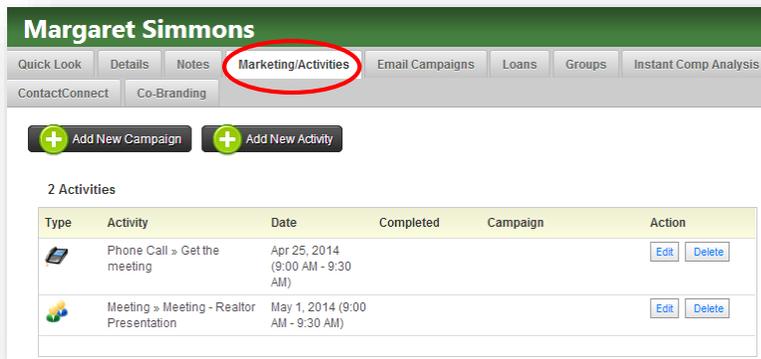
Continue by scheduling TO DO Tasks (to send email and snail mail) and Phone Calls (to check in and to set up meetings). You can follow the New Realtor Partner Campaign as a guide (or you can use it directly from the Surefire Public folder). If you're creating a new campaign, set up reminders for one year.

NOTE: After the first several entries in our campaign, items are scheduled 28 days apart. This way, as long as you start the campaign on a weekday, all contact will fall on a weekday.



On the left side of your screen, click **Save**. If you've completed the campaign, read the advisories then click **I understand the above and wish to save my campaign**. If you would like to continue working on the campaign before saving, click **I'm not done yet. File my campaign so I can edit it later**.

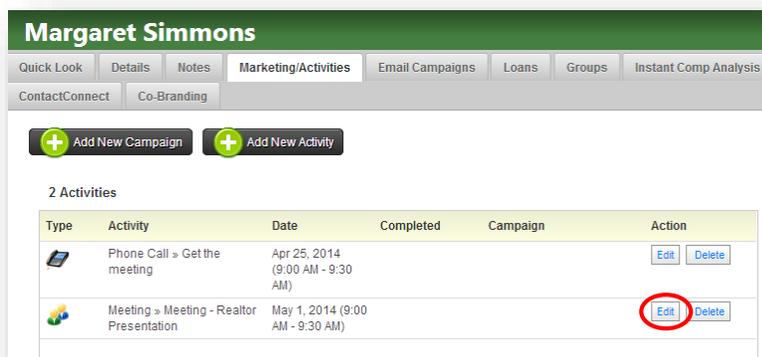
Step Three: Place Contact on Campaign



In our example, we're placing a real estate agent with whom we've just met on a campaign.

First, we'll need to mark in her contact record that we've completed our scheduled meeting.

In the **Quick Contact Search** bar, type her name. Click on the **Marketing/Activities Tab**.



Locate the meeting you've just completed, and click **Edit**.

Edit Activity
 > Margaret Simmons
 > Phone: (452) 145-7890
 > Email: margaret@simmonsrealty.com

Edit Activity

Activity Name: Meeting - Realtor Presentation

Activity Type: Meeting

Date: 05/01/2014
 This Is An All Day Activity
 09:00 AM to 09:30 AM

Complete Date:

Color Code: Green

Details: Meeting to review co-branding opportunities, etc.

Save Changes Cancel

Select the **Complete Date**, then click **Save Changes**.

Margaret Simmons

Quick Look Details Notes **Marketing/Activities** Email Campaigns Loans Groups Instant Comp Analysis

ContactConnect Co-Branding

+ Add New Campaign + Add New Activity

2 Activities

Type	Activity	Date	Completed	Campaign	Action
	Phone Call > Get the meeting	Apr 25, 2014 (9:00 AM - 9:30 AM)			Edit Delete
	Meeting > Meeting - Realtor Presentation	May 1, 2014 (9:00 AM - 9:30 AM)			Edit Delete

Back at the **Marketing/Activities** view, click **Add New Campaign**.

Margaret Simmons

Quick Look Details Notes **Marketing/Activities** Email Campaigns

+ Add New Activity

New Campaign

Campaign: [SUREFIRE SYSTEM] - New Realtor Part

Loans:

Submit Cancel

Scroll in the **Campaign** drop down menu to select the appropriate campaign. Click **Submit**.

The contact's activity list will be populated with all upcoming activities related to the campaign.

It's that simple!

