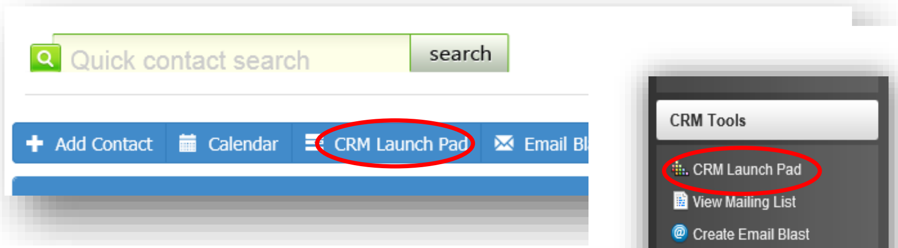
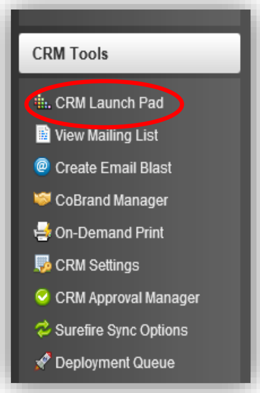
surefire

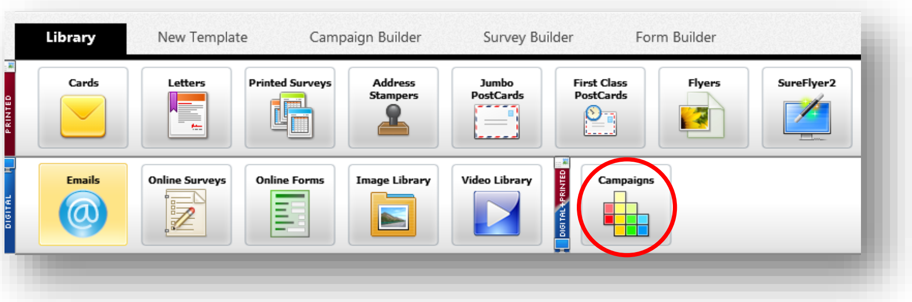
Campaign Builder

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

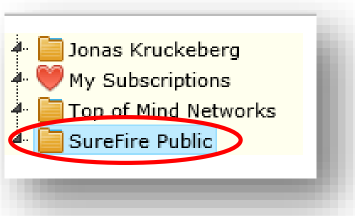


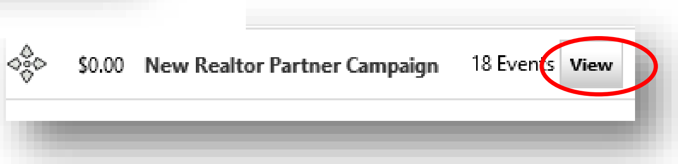


Click **CRM Launch Pad** from the top menu on your Surefire homepage or the right sidebar menu.

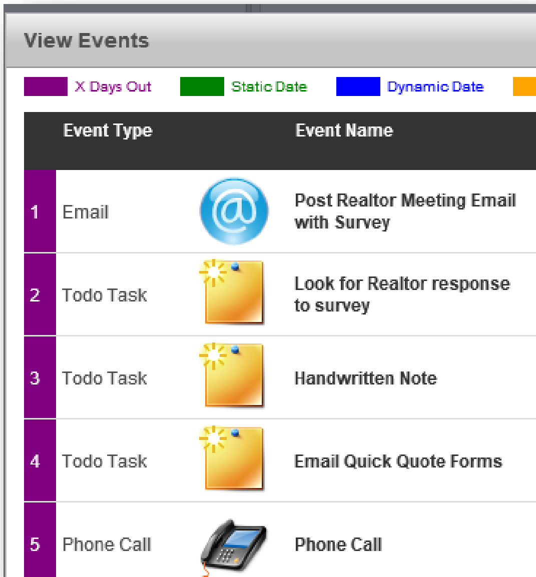


Click **Campaigns**.



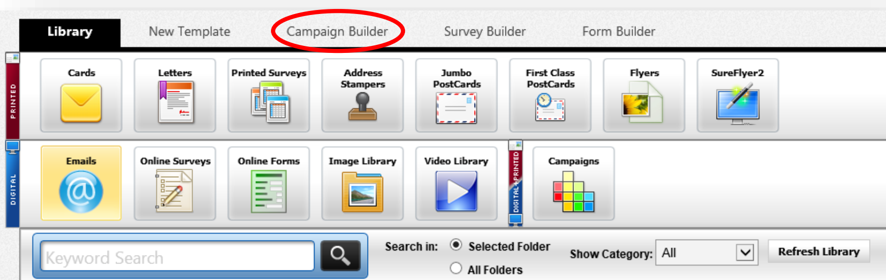


Click on the **Surefire Public** folder, then scroll down to find the **New Realtor Partner Campaign.** Click **View.**

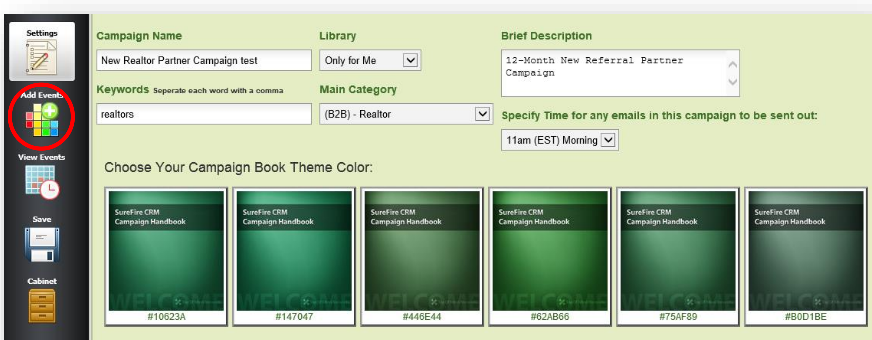


With the exception of the first event, which is an interactive survey, all events are to-do tasks or phone calls. This is a good example of an effective, high-touch campaign.

Step Two: Build a Campaign

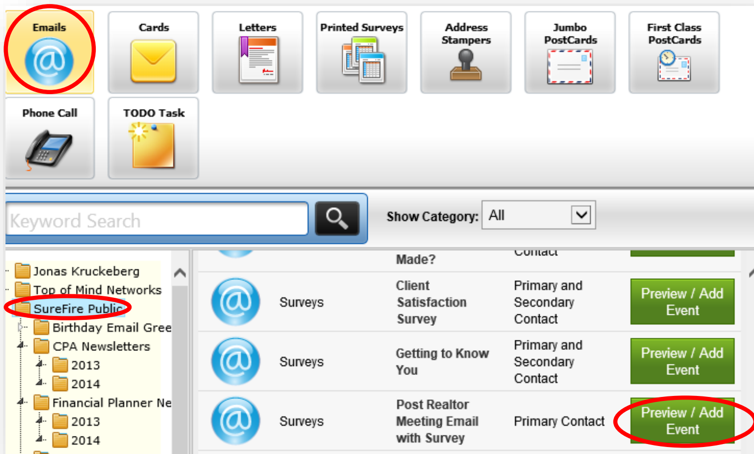


From the CRM Launch Pad, click **Campaign Builder**.

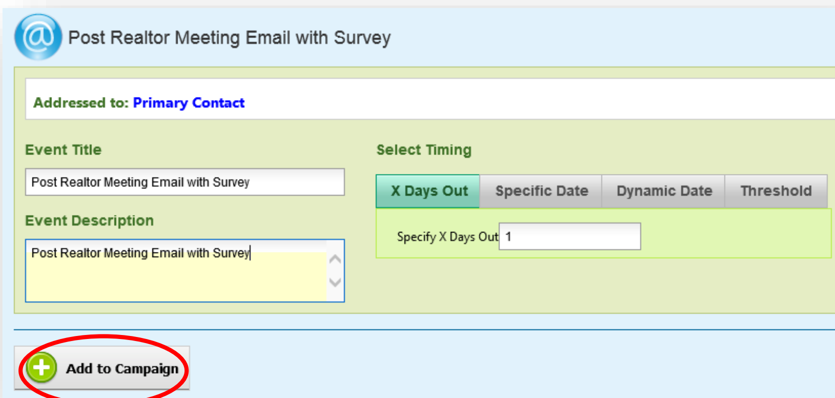


Complete the parameters for the campaign.

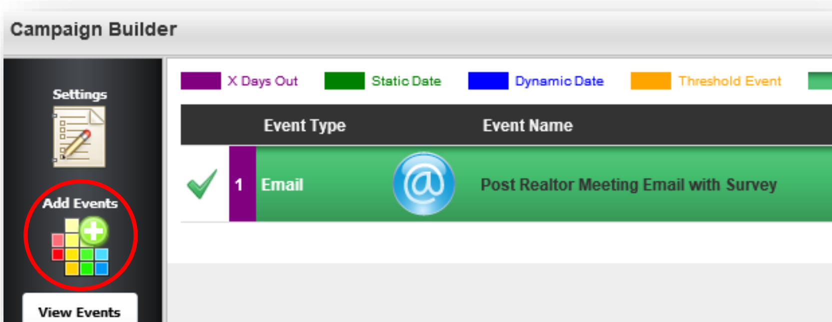
Click on **Add Events** to begin building the campaign.



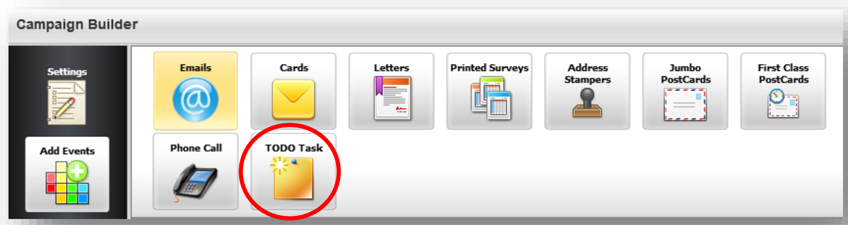
Under the **Emails** tab, in the **Surefire Public** folder, scroll down, then click **Preview/Add Event** next to the **Post Realtor Meeting Email with Survey.**



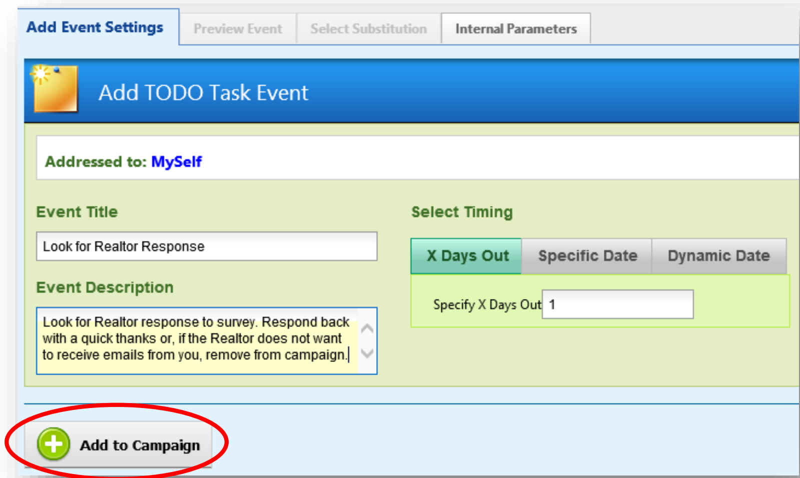
Select Timing by choosing **X Days Out** and entering **1.** Enter an **Event Description.** Click **Add to Campaign.**



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

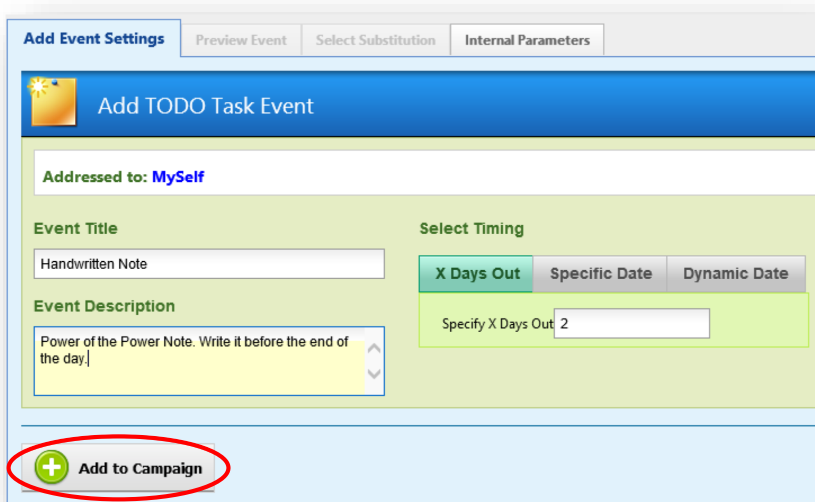


This time, click on **TO DO Task.**



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

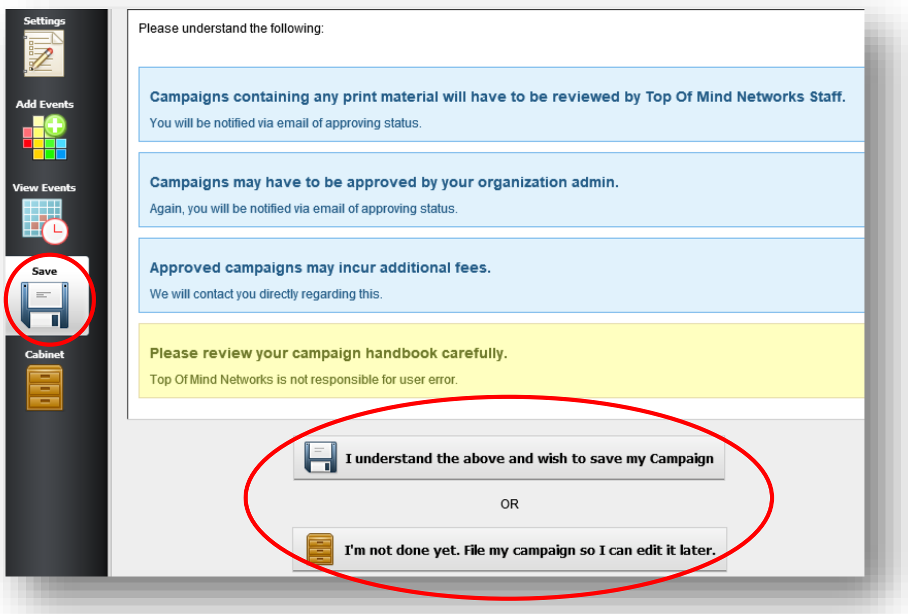
Click **Add to Campaign.**



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.**

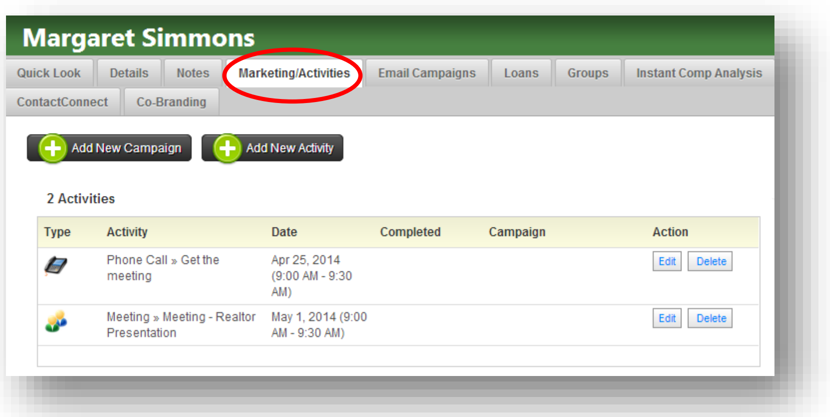
Continue by scheduling TO DO Tasks (to send email and snail mail) and Phone Calls (to check in and to set up meetings). You can follow the New Realtor Partner Campaign as a guide (or you can use it directly from the Surefire Public folder). If you're creating a new campaign, set up reminders for one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

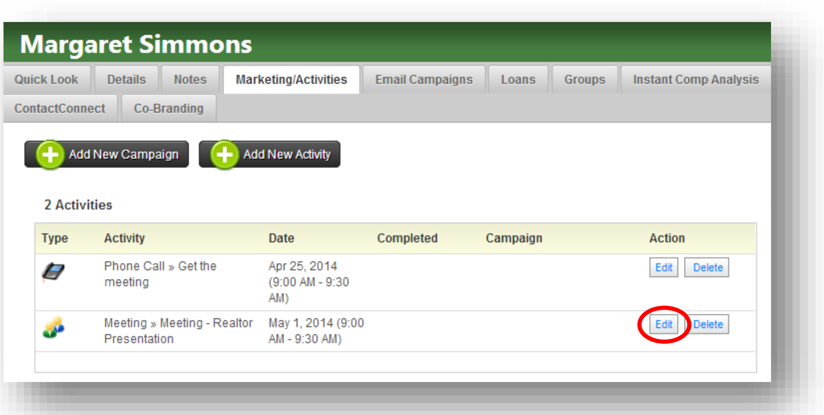
Step Three: Place Contact on Campaign



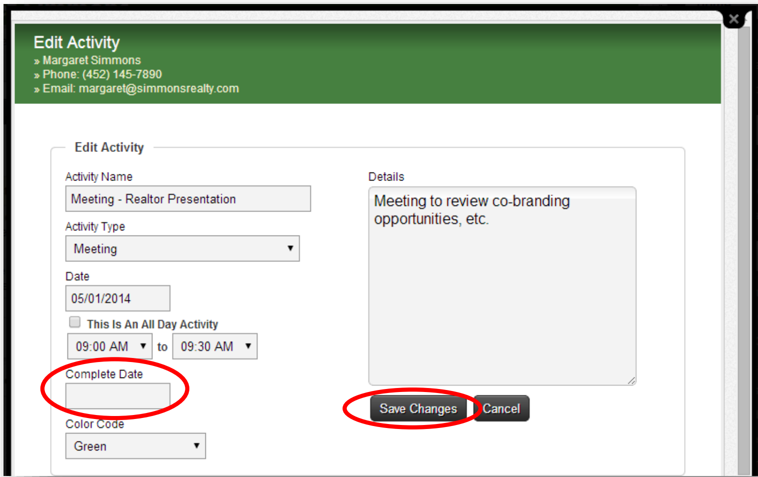
In our example, we're placing a real estate agent with whom we've just met on a campaign.

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

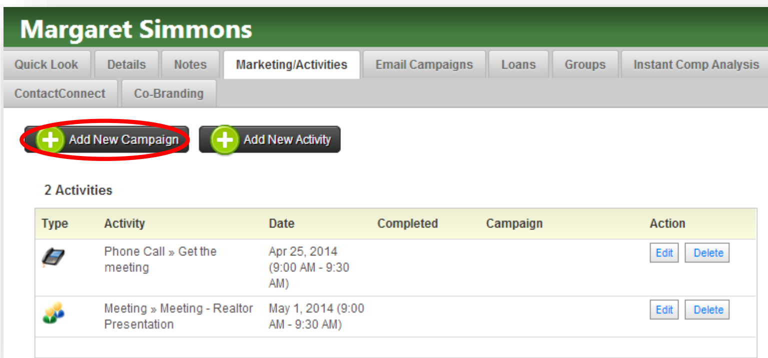
In the **Quick Contact Search** bar, type her name. Click on the **Marketing/Activities Tab.**



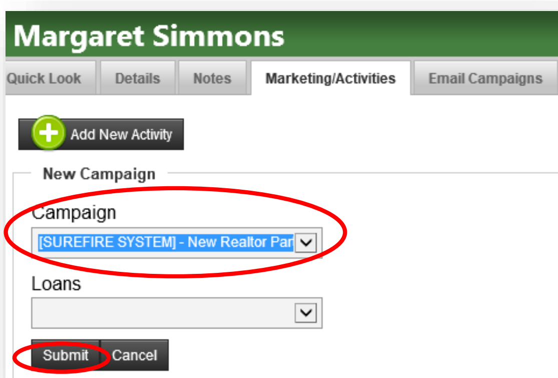
Locate the meeting you've just completed, and click **Edit.**



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



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



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!