



How-to-instructions on building a workflow

A drip campaign is a series of emails and actions in a visual workflow or action group that are designed to nurture leads and prospects.

This type of automation is a great way to communicate with leads who are interested in your product or service, but not ready to purchase just yet.

This article will detail how to create a basic behavioral drip campaign.

Creating Visual Workflows

Drip campaigns are often built with visual workflows. To create a visual workflow for a drip campaign, do the following:

- 1 In SharpSpring's top toolbar, click Automation > Visual Workflows.
- 2 Click + New Workflow.
- 3 Name the visual workflow.
- 4 Click OK.

For more information on creating visual workflows, refer to [Creating Visual Workflows](#).


Adding Triggers

Visual workflows require triggers in order to properly function.

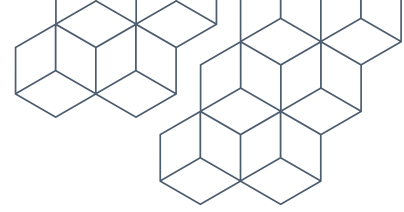
To add triggers to a drip campaign visual workflow, do the following:

- 1 **In the created visual workflow**, under Start, click + Add > Trigger.
- 2 Select a trigger that can be used to start drip campaigns.
- 3 Enter the necessary information for the trigger.
- 4 Click OK.

Note: Triggers that are typically used in drip campaigns include, but are not limited to:

-  fills out the form
-  visits the page





Optional: Adding Filters

Filters provide focus for a trigger and direct it to operate in specific ways.

While optional, consider adding filters to further refine who your drip campaign will send to.

To add filters to a drip campaign visual workflow, do the following:

- 1 **Under the created trigger**, click + Add > Filter.
- 2 Select a filter that can be used to refine your initial trigger.
- 3 Enter the necessary information for the filter.
- 4 Click OK.

Note: Filters that are typically used in drip campaigns include, but are not limited to:

-  has the field > State > location
-  lead score
-  visits the page

Adding Actions and Time Delays

Actions instruct a trigger to do something once the trigger conditions have been met. Time delays dictate how long it takes for an action to activate. When paired, they round out how a drip campaign sends to relevant individuals.

To add actions and time delays to a drip campaign visual workflow, do the following:

- 1 **Under the created trigger** or an **appropriate filter**, click + Add > Action.
- 2 Select send the email.
- 3 Enter the name of the desired email to be sent in the Email Name text box.
- 4 Click OK.
- 5 Under the created action, click + Add > Time Delay.
- 6 Enter the desired time parameters.
- 7 Click OK.
- 8 Repeat as necessary to add any other desired emails to the initial trigger.





Example: User Site Visit Drip Campaign

There are many ways you can utilize the many different triggers, filters, actions, and even action groups when creating a drip campaign. The following example is of a drip campaign where users visit specific sites. This example is somewhat more involved and advanced than the above procedures for creating basic drip campaign framework, but it encompasses all aspects of a successful drip campaign.

Scheduling Emails for Drip Campaigns

In order to create a drip campaign, you will need to first schedule emails for sending. To schedule emails, do the following:

- 1 In SharpSpring's top toolbar, click Content > Emails.
- 2 **Create or edit an email.**
- 3 **Schedule the email to the desired list of leads.**

Creating Drip Campaign Action Groups

Once you have scheduled an email for sending, you can create an action group to track those recipients who click through your content. To create a drip campaign action group, do the following:

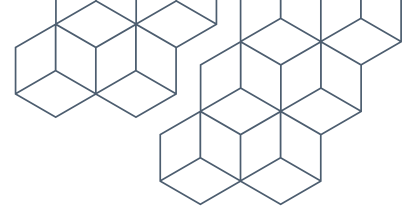
- 1 In SharpSpring's top toolbar, click Automation > Action Groups.
- 2 **Create or edit an action group.**
- 3 Under Start or an applicable group branch, click + Add > Action.
- 4 In the Communication section, select send the email.
- 5 **Select the campaign email that was scheduled.**
- 6 Click OK.

Important: SharpSpring does not recommend that you build an automation based on recipients opening or not opening emails. SharpSpring aims for email clicks and not email opens.

Creating Drip Campaign Visual Workflows

Once an action group has been created, you will need to create a companion visual workflow. To create a drip campaign workflow, do the following:





- 1 In SharpSpring's top toolbar, click Automation > Visual Workflows.
- 2 **Create or edit a visual workflow.**
- 3 Under Start or an applicable workflow branch, click + Add > Trigger.
- 4 In the Site section, select visits the page.
- 5 In the Page URL field, type in the target website URL.
- 6 In the How Often? drop-down menu, select 1 time.
- 7 In the Comparison drop-down menu, select exactly.
- 8 Click OK.

Note: SharpSpring cannot trigger automations on email opens. Automations can trigger on click-throughs to a website or on media center asset views.

Adding Drip Campaign Filters

Once the initial workflow and trigger have been created, you will need to add the appropriate filters to the automation. To create a filter which will limit the recipients of the email drip campaign, do the following:

- 1 **Create a drip campaign visual workflow.**
- 2 Under the created visits the page trigger, click + Add > Filter.
- 3 In the Email section, select visits from the email.
- 4 **Enter the name of the initial drip campaign email.**
- 5 In the How Often? drop-down menu, select 1 time.
- 6 In the Comparison drop-down menu, select exactly.
- 7 Click OK.

