Drip Campaigns

03/26/2025 9:15 am CDT

Overview

Drips is an add-on feature within service**minder**. If you do not see Drip in the side navigation panel, then you cannot utilize this function without purchasing. You may want to consult your brand before doing so.

Drips includes two parts:

1. Triggers - single events that cause actions (considered on-off steps)
2. Campaigns - multi-step actions that occur over a longer period of time started by a Trigger

In this article, we will focus on **Campaigns**.

A **Drip Campaign** is a timed sequence of actions. You can specify the interval between the steps in minutes, hours, days, weeks or months. Each step in the campaign can "do stuff" where the stuff is a list of actions.

Example

A common scenario for a campaign might be a sequence of messages to follow up on a proposal. Your first message might be a "thanks for considering us" message. You could then wait 10 days and send out a "here's why we're the best" email. You could continue to deliver educational messages until your conversion rate drops to the point where it's not worth sending more messages. All of the messages you send out should have links back to the proposal so your prospect is always just one click away from accepting your proposal and moving forward.

Once the customer accepts your proposal, you'll probably want to stop this campaign. You can create a trigger for when a proposal is accepted or scheduled, for example. Add an action that either stops all campaigns or your "educate and convert" campaign.

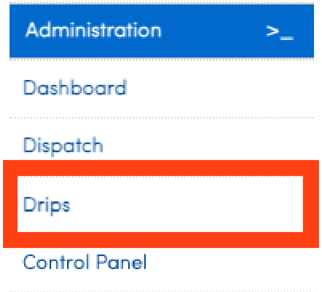
Video Tutorial

Please watch the video below to learn more about Drip Campaigns.

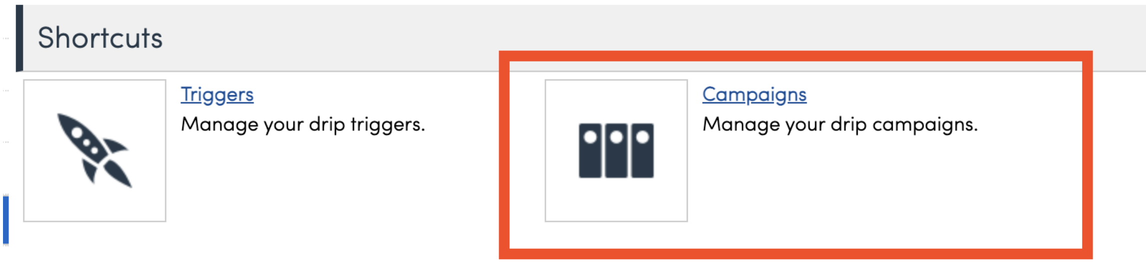
Your browser does not support HTML5 video.

Settings and Navigation

In the side **Navigation** panel, scroll to the **Administration** section and select **Drips**.

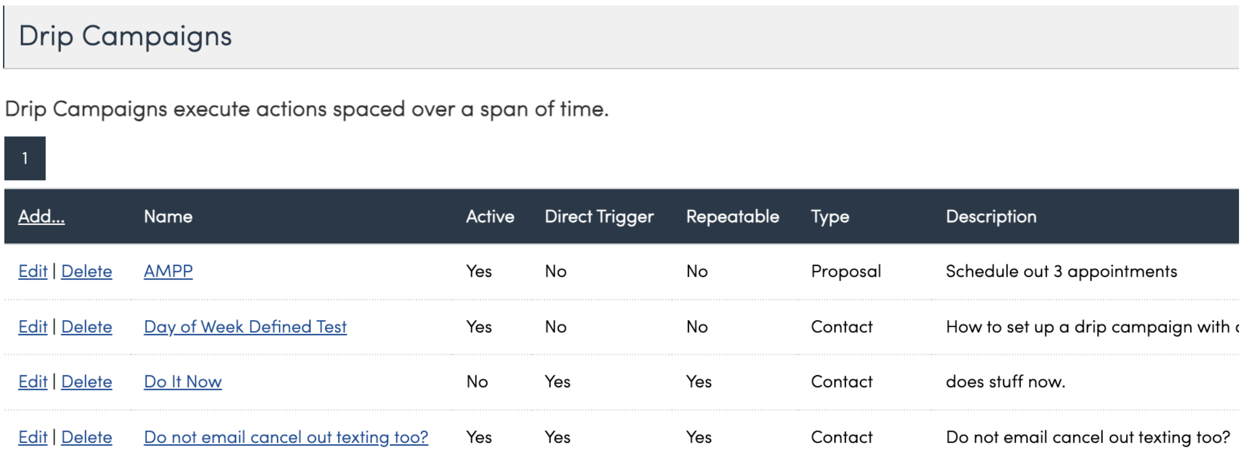


Then you will see these two options at the bottom of the page and choose **Campaigns**.



Create A Campaign

You can **Add** a new campaign (top left column header) or you can **Edit** an existing campaign.

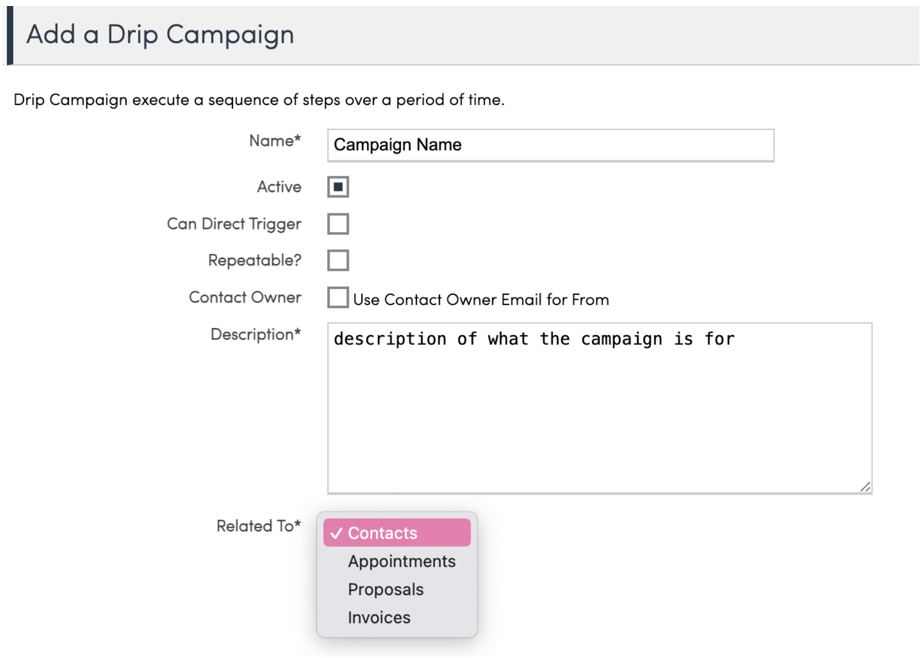

Drip Campaigns

Drip Campaigns execute actions spaced over a span of time.

1

Add...	Name	Active	Direct Trigger	Repeatable	Type	Description
Edit | Delete	AMPP	Yes	No	No	Proposal	Schedule out 3 appointments
Edit | Delete	Day of Week Defined Test	Yes	No	No	Contact	How to set up a drip campaign with
Edit | Delete	Do It Now	No	Yes	Yes	Contact	does stuff now.
Edit | Delete	Do not email cancel out texting too?	Yes	Yes	Yes	Contact	Do not email cancel out texting too?

You need to add a Name and a Description. Then choose what type of campaign this will be.



Type needs to align with the Trigger Type and the Ad-hoc Email Type. Your options are:

1. Contacts
2. Appointments
3. Proposals
4. Invoices

Other settings options are:

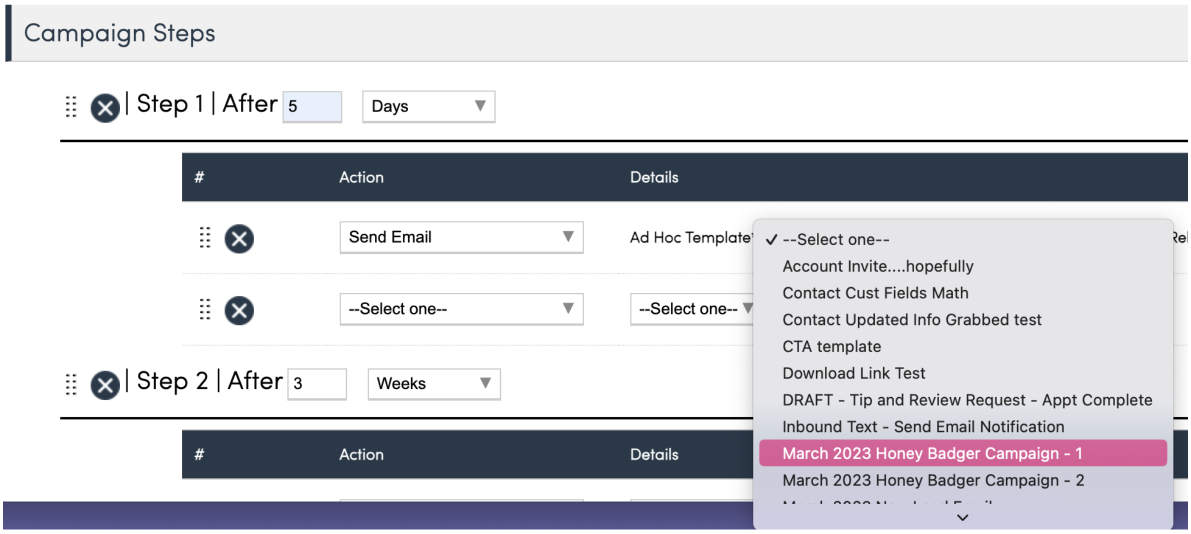
- **Can Direct Trigger** - do you want the ability to manually start this campaign on a customer? If so, turn this on and a Drip! button will appear on the associated details page, i.e. for a proposal type campaign, you can click this button on a proposal details page, allowing you to directly start this campaign from there. If this is turned off, you will not see that button and cannot directly start this without a Trigger.
- **Repeatable** - Do you want a person to be able to go through this campaign multiple times? If so, turn this option on.
- **Contact Owner** - If you use this capability in SM, it will use that person's email address in the Sent By field. Usually, this is for businesses that have multiple sales agents that have territory ownership and have contacts that only they can "work".

> These other settings are not necessary to make the campaign work or start. They just provide more options for businesses that want to utilize them. Feel free to leave the default settings as-is and keep building the Campaign.

Building Steps

Next step in setting up a Drip Campaign is building the timeline of what you want to happen and when. You have all the same actions that you would for creating a Trigger, so there are many options and we suggest putting a lot of time into the strategy and thinking each step out before actually starting to build.

For instance, after 5 days of the Trigger firing (let's say the trigger is Proposal Expired) I want the system to send an email to the Contact.



Step 1 is **After** 5 days of when the trigger fired. I make the **Action** "send email" and I will select an Ad Hoc Template. The email template must be made before it will show up on the drop down list.

Step 2 is **Afte**r 3 weeks since **Step 1** happened. In other words, this will be 3 weeks + 5 days since the Trigger fired.

If you have specific days you want steps to take place, you must count appropriately between steps. If you want it to happen on Day 1 of the trigger firing, then make it an "1 Hour" After. If you want something to happen on day 3, it will be "2 Days "After the first step.

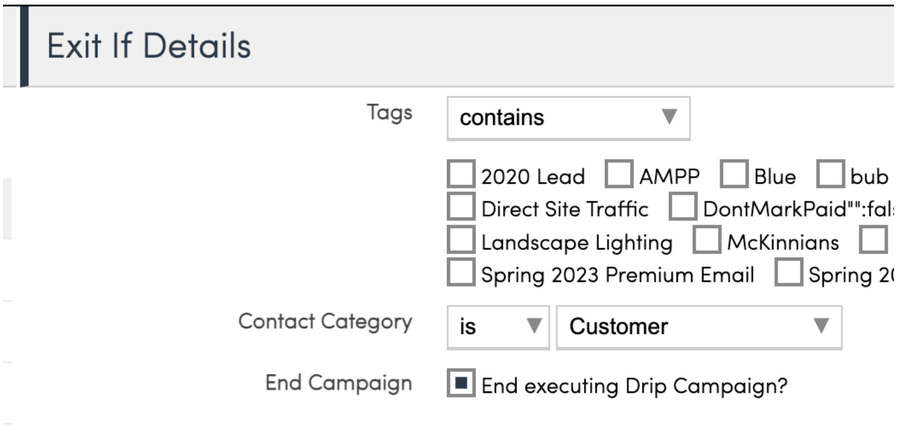
Ending Drip Campaigns

There are no limits to the steps that you can build. As with any automations that you build, we caution to you to think about how someone would exit the campaign if they are reengaged by the business. For instance, if this campaign is to win back a lost sale when the proposal expired, that Contact finally answers an email or calls the office - how will you stop them from getting these emails or text blasts?

Build either a step into the Campaign or a separate Trigger. For instance, you can use a proposal sent as a trigger for them to exit the campaign. You can also include **Exit If**, which is an action that you can filter Contacts by Tags or Categories.

When using an Exit If action, there is the option to turn on **End Campaign**. If you turn that on, it will stop the entire campaign for anyone that falls into the filtering options that you select. If you leave End Campaign off, it will only stop the one step that this Exit If action is added to. If you want it to apply to the full campaign, then you may want to add the Exit If to the first step so that it applies to anything coming after it. If you add it mid-way through the campaign, then the Exit If only applies at that point.

If you have a multi-step campaign then you need to be aware that Exit Ifs will only apply to the one step they are added on, unless you turn on the "End Campaign" option.



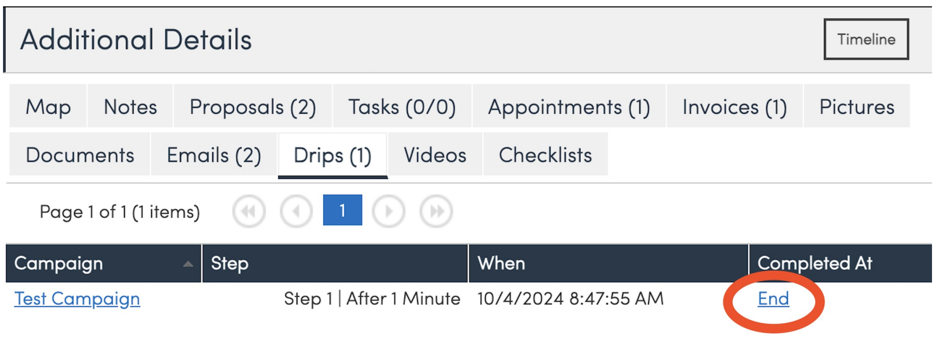
You can add the ExitIf action at various stages of the campaign and have them apply different filters at different steps.

The **Start Campaign** trigger is another great way of filtering, in lieu of Exit If actions. You can use that trigger to target the right audience from the beginning. Rather than thinking of who you want to exclude (and use Exit Ifs), approach the campaign from the mindset of who should be included.

> We recommend building separate triggers to stop Drip Campaigns. It makes it more clear cut for the system to react whenever that event takes place. Use Exit Ifs sparingly for more specific scenarios.

How To Manually Stop a Drip Campaign

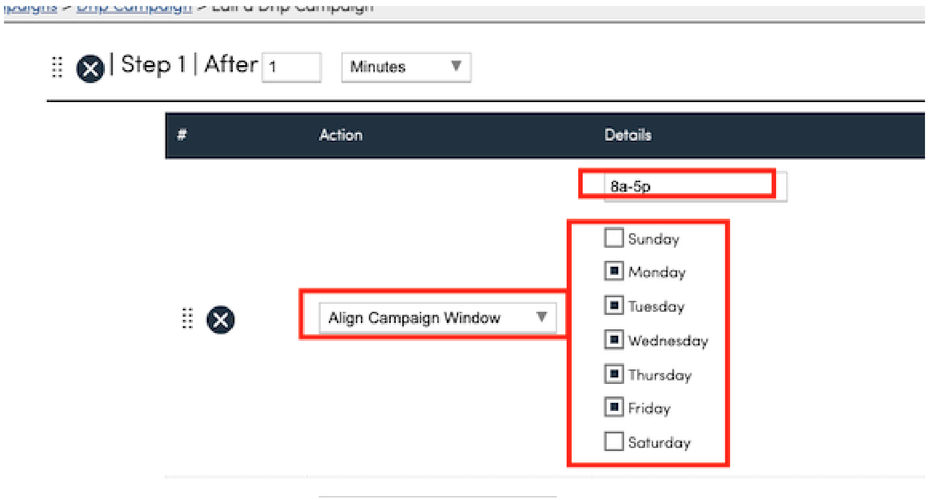
Go to the **Contact**, under **Additional Details** select **Drip.** You will see the option to end any Drip Campaigns that are currently active for that contact.



Timeframes for Actions

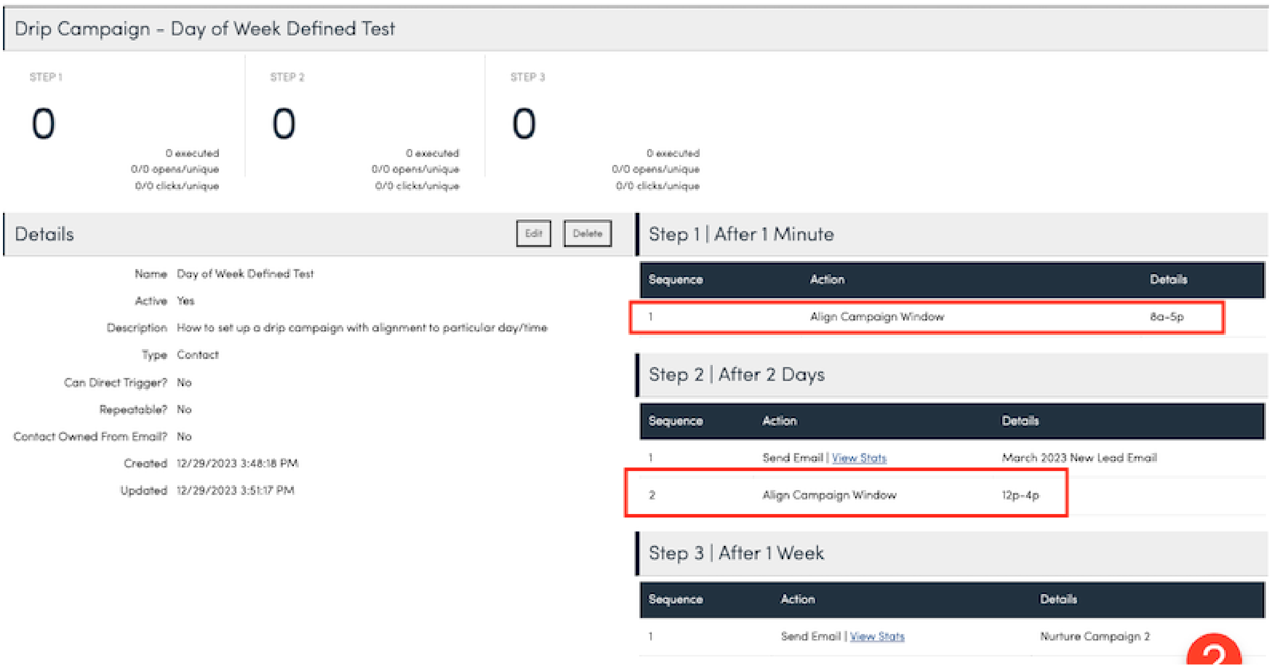
You may want to send an email or text during a certain time of day, regardless of when that step is actually occurring. Using the **Align Campaign Window** action, you can designate the time frame the following actions should occur, so you aren't accidentally sending emails and texts in the middle of the night.

You also may want to specify day/days when campaign steps should occur. Perhaps you only want a campaign step to happen on a weekday.



When creating a campaign where you want to specify Date/Time for the FIRST step, your new first step will be a "Dummy" step which ONLY has the "Align Campaign Window" action. Then, your second step will be the actual Campaign action you want.

The Align Campaign Action ONLY affects the step which follows it. So, you'll need to add this action to EVERY step in a campaign if you want the next step to be tied to a specific time or day or day of week.



If the alignment window + some additional time is proving to cause issues. You have a couple of options to fix:

- Set the window to 5-6pm, then set the next step's run time to something like 0 minutes or 1 minute.
- Use less align window steps, and allow the steps' delay timer line up naturally. For example if you always have step 5 running between 12-1pm, you can skip adding another align and just set the next step to run in 5 hours so that it naturally falls between 5-6pm.

Ad Hoc Emails

You will need to create your ad hoc email templates ahead of time to use them in Drip Triggers or Drip Campaigns. Please watch the video below in regards to Ad hoc emails combined with Drips.

Learn more about Ad Hoc Email Templates.

Testing Campaigns

Automation's great, especially when it works exactly like you want. But sometimes interactions between campaigns and triggers cause unexpected or unintended consequences so it makes sense to plan carefully and test everything as you go. For example, when you set up a new campaign, consider creating a trigger that runs off of adding or removing a test tag. That way you can add a test contact, then add the test tag to that contact to kick things off.

You can also add a **Send Notification** action to your steps -- that way you'll get an email whenever a particular step of a campaign (or a trigger) is executed. Once you're satisfied that the flow works and the emails all look good, you can then change your trigger to match the real condition, such as a new contact being added in the Prospect category.

If you want to run a test Contact through the campaign, consider making the steps a matter of minutes just so you can review each communication or action and make sure it happens the way you anticipate. Once the test is completed and you are satisfied with the results, make the steps days, weeks, or months.

Editing Active Campaigns

If you decide to edit any step of the campaign, you will need to do so in each organization. For franchisees who create their own, this is the only way to edit the campaigns. If the brand created the campaign and deployed it to the locations, you cannot redeploy an active campaign without causing issues.

To reiterate, you will need to edit each campaign in each organization manually.

If there is an active campaign running with contacts moving through the steps, you cannot edit the campaign at the brand level and deploy to all organizations. This will result in freezing or removing contacts that were active in the campaign.

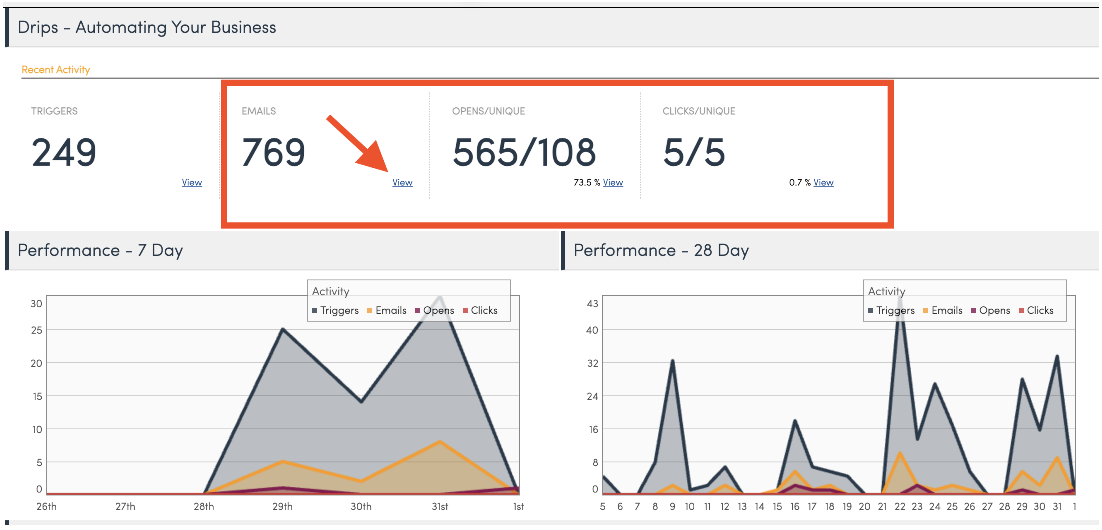
Renaming Campaigns

If you wish to rename a campaign and deploy, this will result in a completely new campaign being created in the organizations. If you want to edit the name of the campaign, you should do this manually per location. If the franchisee renames the campaign, and the brand makes an edit and redeploys, this will also result in a completely new campaign being created.

The system uses the naming convention to determine if something is new or existing. If it doesn't find a corresponding name, it assumes it is a brand new entity.

Drip Campaign Reporting

If you go back to the main Drips page, you will see three columns specifically about the emails and campaigns sent with tracking for opens and clicks.



- **Opens or Clicks** - These are a Total number of opens and clicks. The same person may reopen the same email twice, and both will be collected in these stats
- **Unique Opens or Clicks** - These filter out repeat opens or clicks using identifiers such as IP addresses. This is a more filtered view of the actual count of individuals that engaged with the email campaigns.

You can click on any of the **View** links to get more details. This will even report on text messages sent as part of the campaign.

Recent Opens

Page 1 of 1 (8 items)

Timestamp	Contact	Action Source
7/16/2024 3:55:47 PM	George Costanza	Inbound Text Response
7/16/2024 3:57:05 PM	George Costanza	Inbound Text Response
7/17/2024 12:21:41 PM	B B King	Appointment Scheduled Info Grabbed
7/18/2024 4:54:24 PM	9725786600	Inbound Text Response
7/23/2024 4:42:21 PM	Katie Test	Test recurring shortcodes

FAQs

What is the difference between Drip Campaigns and Campaigns in the top menu?

You cannot use marketing campaigns as a part of Drip Campaigns. There is no cross-over.

- The Campaigns button in the blue menu is for marketing campaigns - one off emails like MailChimp or Constant Contact.
- Drip Campaigns are connected to Drip Triggers and (in many cases) are related to Taskboards.

How do I start a Drip Campaign?

You will need to build a Drip Trigger that Starts the campaign that you built. Also, if you start a campaign there are triggers that can stop the campaign as well. We urge you to consider how to end a campaign and what to do with the Contacts afterwards. Will they sit on a Taskboard forever? Will you manually remove them? Or should a step of the campaign be to remove them from a Taskboard all-together?

Can I, as a franchisee, create my own?

As long as you have the Drips functionality (you can buy it in Marketplace if not), then yes. You have the ability to create your own campaign, triggers, taskboards.

Some brands choose to have standardized processes, which they build and deploy to all orgs. But owners still have the ability to build additional taskboards and drip campaigns to meet their unique business needs and goals.

I want to build out a drip email campaign for lost leads. I would like to separate the content into two buckets; web leads and phone leads. How do we differentiate these within the lead contact and is there a way to "only send this email drop to web leads" not phone?

The short answer is yes you can, you just need to determine how to designate the different contacts. That may be the tricky part.

Drip campaigns can be based on tags, so you can create tags for the contacts. The drip action can start the campaign, then filter on that tag.

Depending on where the leads are coming from, you might be able to set up a trigger to auto-tag the contact at the beginning and/or start a campaign. For instance, if they're coming from a certain API key.

When a customer sends us a text message, any text at all, can the campaign stop?

You could turn on the text notifications for Users to be notified on the web when in serviceminder and through email as a reminder there:

Incoming Call	When there's an incoming call	☐	☐	☐
New Text Message	When you receive a new text message	☐	☐	☐
Part Reorder Request	When a part's quantity on hand gets too low and needs to be restocked	☐	☐	☐

Otherwise it would be a matter of placing a list of common response words in that field to hopefully catch most scenarios of a customer texting in (e.g. Hello, hi, hey, stop, no, yes, thanks, thank, you, me, I, etc.). Please make sure to list the words with commas separating. This would be adding a trigger option of any inbound text/not having that field be required.

Troubleshooting

Okay, so triggers, taskboards, campaigns - this is all getting a little confusing. Where do I start if I'm doing this for the first time?

Start by building a Taskboard and making sure the swim lanes (states) are how you want them. Then build any ad hoc email templates or text templates (you can do them on the same page). Once you have those created, move on to building the Drip Campaign. Once done, create the Triggers.

Pause and test often. If you are satisfied with the results, maybe share with a pilot group of franchisees and have them use it for a couple of weeks and get their feedback. It is easier to make alterations now than before every location in a large brand has these deployed out to them.

Why can't I see an ad hoc email template that I created for my campaign?

You cannot see the email because the category type of the ad hoc email template and the type of drip campaign are not aligning. For instance, you need to select if this is "Contact" or "Appointment" based. If the email template is currently "Contact" but the campaign is "Appointment". You need to align them to the same category type.

I don't know why you can't X out the second email but if it doesn't have a template attached to it then it won't send. It may be a weird glitch and adjust itself once you select the template for the first email.