



Creating Email Series Campaigns

What is the purpose of an email series campaign?

Email series campaigns are a group of emails related to a single topic, such as a product or service. Rather than deploying a single email campaign, creating a single touchpoint, series campaigns allow partners to schedule a series of emails that relate to a single product or service at a set schedule.

This creates multiple touchpoints in a single email deployment, saving valuable time and ensuring consistency in both messaging and design.

How do I create them?

When creating an email nurture campaign, you must first create the emails you want to add to the nurture one at a time. Once created, follow these steps:

1. Create an email series campaign shell.
2. Add emails to the series campaign (**Note:** Click [here](#) for instructions on how to create individual email campaigns.)
3. Create a schedule for emails to drip automatically.
4. Publish to Marketing Center.

What will I do in this lesson?

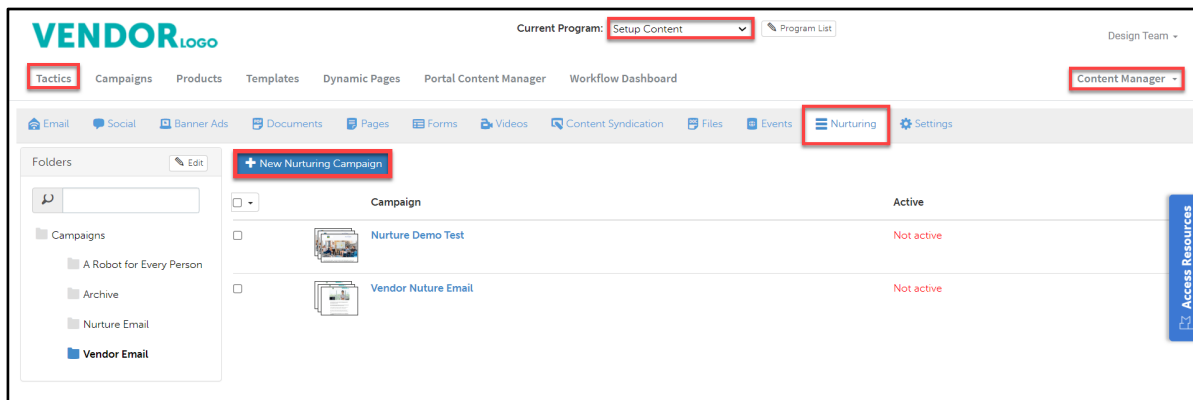
By the end of this lesson, you will be able to do the following:

- [Initiate a nurturing campaign in Content Manager](#)
- [Create series campaign settings](#)
- [Add emails to a series campaign](#)
- [Schedule email deployment](#)
- [Publish series campaign](#)

Steps

INITIATE NURTURING CAMPAIGN

- 1 In **Content Manager**, from **Current Program**, select **Setup Content**.
- 2 From the header, select **Tactics > Nurturing**.
- 3 Select **New Nurturing Campaign > Copy Previous**. The Nurturing Settings page opens.



CREATE EMAIL SERIES SETTINGS

- 1 In the **Name** field, type **My Practice Email Series Campaign**.
- 2 In the **Description** area, type **This is my practice email series campaign**.
- 3 From **Schedule type**, select **Email Series**.
- 5 In **Would you like to make this nurturing campaign available for pulling from the managed library**, click **Yes**.

The screenshot shows the Vendor Logo Content Manager interface for creating a new nurturing campaign. The top navigation bar includes 'Tactics', 'Campaigns', 'Products', 'Templates', 'Dynamic Pages', 'Portal Content Manager', and 'Workflow Dashboard'. The 'Content Manager' dropdown is visible. The main navigation bar includes 'Email', 'Social', 'Banner Ads', 'Documents', 'Pages', 'Forms', 'Videos', 'Content Syndication', 'Files', 'Events', 'Nurturing', and 'Settings'. The 'Nurturing' tab is selected. The left sidebar shows 'Folders' with 'Campaigns' expanded, listing 'A Robot for Every Person', 'Archive', 'Nurture Email', and 'Vendor Email'. The main content area shows the 'Nurturing Campaign Settings' form. The 'Name' field is filled with 'My Practice Email Series Campaign'. The 'Description' field is filled with 'This is my practice email series campaign'. The 'Keywords' field is empty. The 'Schedule Type' section has two radio buttons: 'Nurturing (Send emails based on date intervals and rule based contact list)' and 'Email Series (Send emails on a pre-selected dates and manually set contact list)'. The 'Email Series' option is selected. The 'Would you like to make this nurturing campaign available for pulling from the managed library?' section has two radio buttons: 'No' and 'Yes'. The 'Yes' option is selected. A 'Contact us' button is on the right. An 'Access Resources' button is on the right.

- 6 In **When would you like this to be available in the managed library**, click **Always**.
- 7 In **What program would you like to use the campaign in?**, click **Setup Content**.
- 8 In **Would you like to limit access based on account profile fields**, click **No**.

When would you like this to be available in the managed library?

Always

Only during the following period

Feature Campaign:

Feature this campaign in the library

What programs would you like to use this campaign in:

- CMS-Live
- CMS-Setup
- Dev - Setup
- Dev - Testing
- Gympass Demo
- Partner Marketing
- Qlik Demo
- Rewards
- Schneider Electric Demo
- Setup Content

Would you like to limit access based on account profile fields:

No

Yes

- 9 In **What attributes would you like to set for this asset?**, select all required attributes.

What attributes would you like to set for this asset:

*** Languages**

- All
- English (United States)
- English (United Kingdom)
- Spanish

*** Marketing Focus**

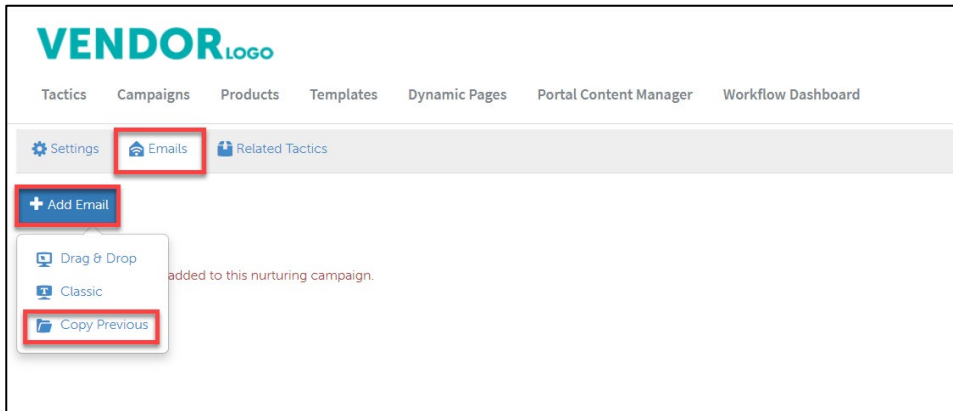
- All
- Prospects
- Existing Customers
- Enterprise
- SMB

- 10 Click **Save**.

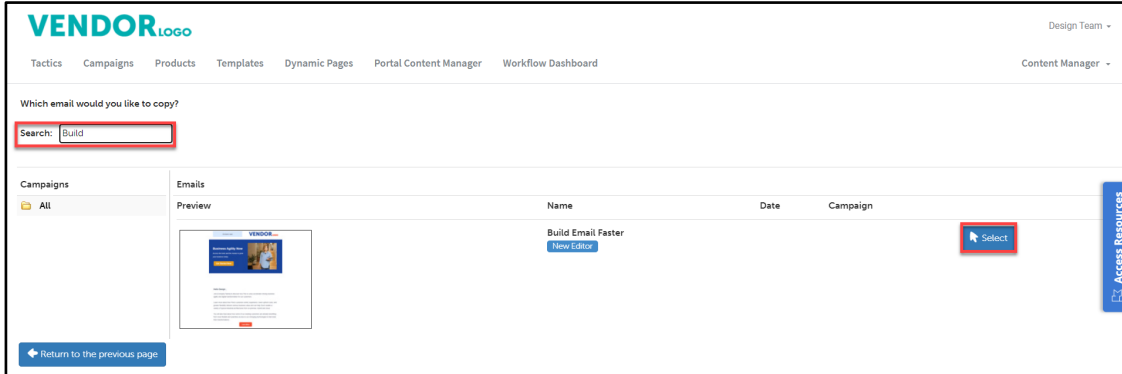
ADD EMAILS TO EMAIL SERIES CAMPAIGN

Note: Before creating an email series, build all individual campaigns you want to include within the series. Click [here](#) for instructions on building individual email campaigns.

- 1 From the **Nurturing Setup** tab bar, select **Emails**.
- 2 Click **Add Email > Copy Previous**. The email search page opens.

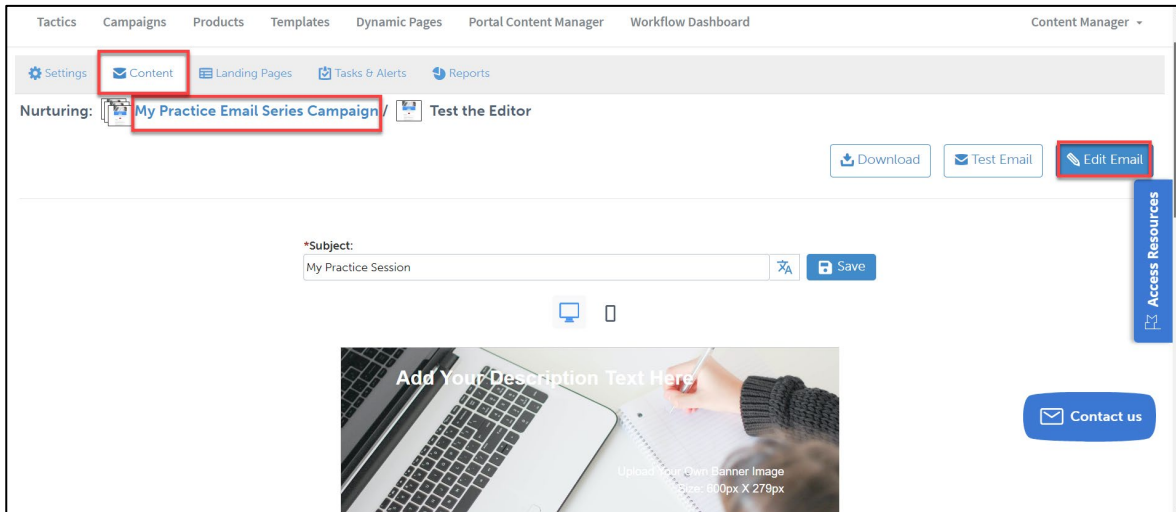


- 3 Locate the **email campaign** you want to include, then click **Select**.



- On the **Content** tab, Click **Edit Email** to make any adjustments necessary to the email content.
(**Note:** adjustments apply to the email series version of the email only. The original email remains unchanged.)

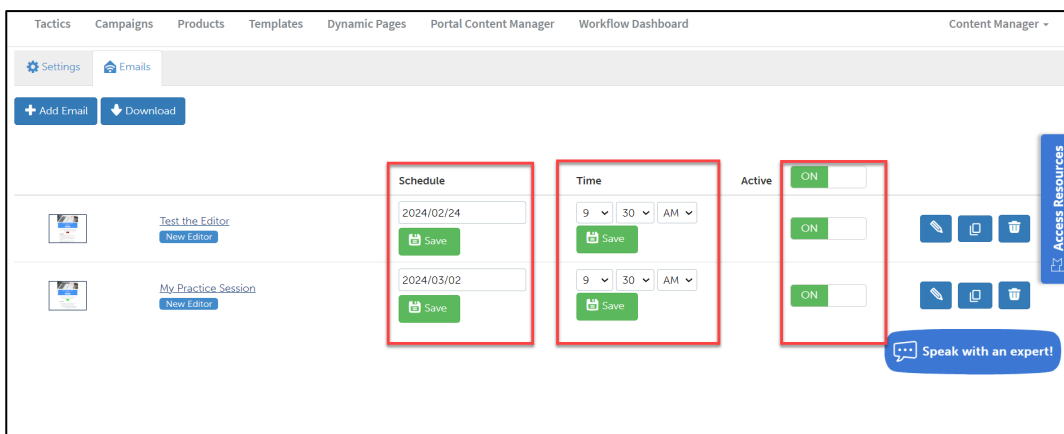
- Use the **breadcrumb navigation bar** to return to the **Nurturing** page.



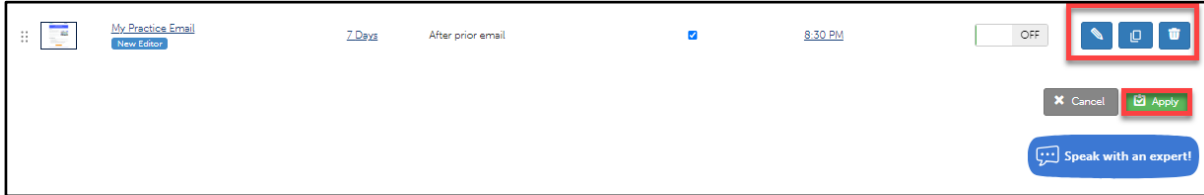
- Repeat steps 3 through 5 to add all desired emails to the nurture.

SCHEDULE EMAIL DEPLOYMENT

- From the **Email** tab, in the **Schedule** column, enter a **date** for each email in the series campaign. Then, click **Save**.
- In the **Time** column, click on the **time** for each email in the nurturing campaign to enter the **time of deployment**. Then, click **Save**.
- In the **Active** column, click the switch to **ON**. (**Note:** You must accept the Data Privacy and Processing terms.)

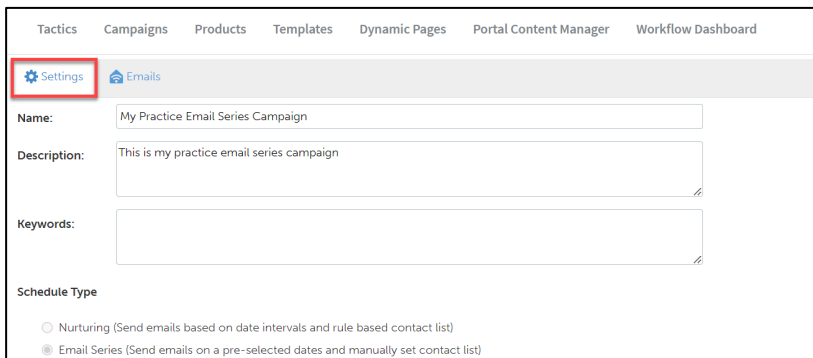


- 4 Use the **buttons** in the last column to **Edit, Copy or Delete** an individual email from the Nurturing campaign.
- 5 Click **Apply**.

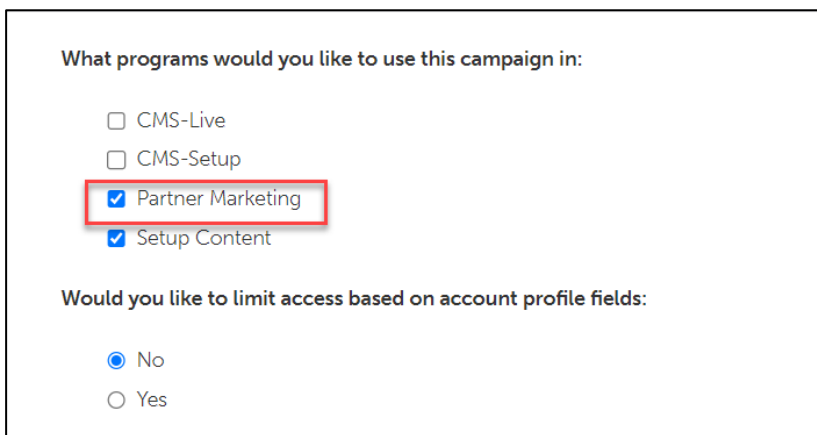


PUBLISH NURTURING CAMPAIGN (THIS STEP IS FOR REFERENCE ONLY)

- 1 Return to **Content Manager > Tactic > Nurturing > My Practice Email Series Campaign**.
- 2 From the **Nurturing** toolbar, click **Settings**.



- 3 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be Partner Marketing).



- 4 Click **Save**.