

Annual Renewal



Remembering annual reminders for different customers can be a chore, especially when they all happen on different dates. Whether you need to remind someone of an annual check-up, service, payment or appointment, it's all possible with Marketing Automation.

How to set up the Annual Renewal Campaign:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

This one is a one-Stage Email – Connect Campaign that can run indefinitely.

Step 1

Create and **start** your automated email template in Connect.

Step 2

Create your Campaign Source. Filter your list, which could be activities, opportunities, profiles, or anything with a due date, to 'next month'. This should produce a list of all of your customers who are due to renew something next month.

Set up a new Campaign, and create a Stage. The media type should be Email – Connect, and drag your 'renewal date' Campaign Source to the included column. Save and run '**Repeatedly or On a Schedule**' to access Marketing Automation.

Choose your Automated Template, a start date and set it to run **Monthly to New Recipients only** on the 1st day of each month. If you don't set an end date, your Campaign Stage will run indefinitely.

That's it! On the first day of every month your Campaign will send an email to all customers whose renewal is the following month.

 Annual Renewal Account / Contact Email - Connect - Account Management	<i>Runs Monthly on day 1 at 11:30 From 23/12/2015 to 31/12/2016 To New Recipients Only Using template: Annual Renewal</i>	0 Activities 0 Appointments 0 Opportunities 0 Bookings	0 Sent 0 Delivered 0 Opened 0 Clicked	 
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