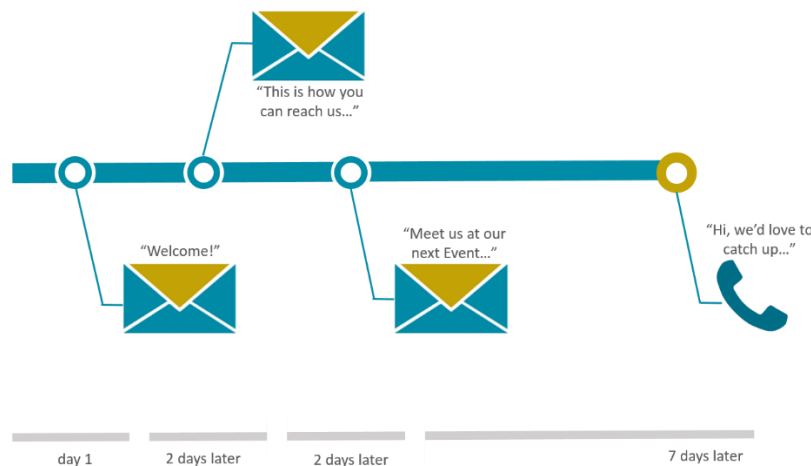# gold-vision

Welcome New Customers

Hurrah! After capturing a Lead and nurturing it up to the crucial purchase decision, you've won a new customer! Great news! So, that's that for marketing automation, right?
Wrong! Many Marketing Automation solutions position themselves as a 'Lead only' tool. The main reason for this is they run inside their own product database, separate to CRM. Once a Lead has become a customer, typically it would move out of the Marketing Automation solution and into CRM. But Gold-Vision is a truly integrated solution, and once your Lead has converted into a customer you can still use automation!

One common requirement is a welcome series to onboard new customers, such as the example below:

The series includes a welcome email, an introduction to help and support contact details, an event calendar and finally a follow up call from their Account Manager. Ensure you have set up and started your automated email templates in Gold-Vision Connect, and then it takes minutes to set up the Campaign.

How to set up the Welcome Series:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

Step 1

Create and **start** your automated email templates for the welcome email, contact details and event calendar in Connect.

Step 2

Set up your automated Campaign. Create a **Campaign Source** of your customers by filtering a list in Gold-Vision. Be conscious to create a Source that will only include customers from the date you would like your Campaign to start on, to avoid sending all of your existing customers the welcome series when you turn it on!

Create a new Campaign, add your first Connect Campaign Stage 'Welcome Email' and include the 'Customers' Source.
Run your Stage '**Repeatedly or On a Schedule**', choose your automated template from the drop down options, and set a start and end date. This Campaign Stage only runs to **New Recipients**, every hour at 30 minutes past. This means that any new customer will automatically be added to this Campaign Stage, and sent a Welcome Email within an hour of becoming a new customer in Gold-Vision.

Add in 2 more Connect **Follow Up Stages** for the contact details and event calendar, and make sure to involve these 2 rules:

1) Send to **Sent Recipients only** (will set automatically as default)
2) **Delay Sending** by 2 days.

This will ensure that your new customers will receive each Follow Up Stagetwo days after the previous email. Set up the automation by running your Stages '**Repeatedly or On a Schedule**' and choose your time of day to send, when to start and end the Campaign, and select your automated email template from the drop down list.

Step 3

Finally, add in your **final Follow Up Stage**. This time select **Phone** as your media type, add your rules (this time we **delay** the final Stage by 7 days) then set up the kind of activity you would like. We've set the Stage to '**Create Account Activities**' for the Account Manager, meaning your new customer's Account Manager will receive an Account Activity to call their customer 7 days after they receive the event calendar email.

Run your Phone Stage '**Repeatedly or On a Schedule**' to set up the automation, we've set ours to run **Daily** at 10am.