



Campaigns – Lifetime

Lifetime campaigns in Total Expert help you maintain relationships with past clients and prospects by keeping your name in their inboxes. Using these campaigns and journeys automates these touchpoints to benefit both marketers and end users.

Available Expert Content Lifetime Campaign Options

- Campaign Builder – Monthly Mortgage Newsletter
- Campaign Builder – Weekly Expert Update Newsletter
- Campaign Builder – Holiday Campaign
- Birthday Video 2.0 Journey

How Do You Get These Journeys Ready?

- Review the content of each email template to ensure that the messages you send out align with your organization’s brand guidelines.
 - In the Birthday Video journey, preview the email and click the video thumbnail to review video content.
 - For the holiday and newsletter campaigns, navigate to **Campaigns → Campaign Builder** and click the name of a campaign. Select the **Content** tab, then for each message, click the **Edit** (pencil icon) button and click **Preview** to review each template.
- Review how many emails you want to include in each campaign.
 - Expert Content provides a wide variety of email templates for holidays and newsletters, including 3 for birthdays. Review this content to determine how many holidays, newsletters, and birthdays you want to send messaging for in your campaign.
- Determine the availability type.
 - The default availability for the holiday and newsletter campaigns is Mandatory. This setting does not allow users other than admins to stop the campaign for their contacts.
 - If you want your users to be able to opt out, open the campaign settings and change the Availability Type to **Opt out**.
- Determine email dates and times.
 - In the Birthday Video journey, the default is to send the birthday video email the day before the contact’s birthday. If you would like to adjust this timeline, adjust the event parameters of the orange condition components.
 - In the holiday campaign, the default is to send emails at 8am on the day of each holiday. The time zone will reflect the admin account the campaign is published in. If you would like to adjust this timeline, select the **Content** tab, then for each message, click the **Edit** (pencil icon) button, select new date and time settings, and click the **Save** button.
 - In the newsletter campaigns, the default is to send emails at 8am every Friday. The time zone will reflect the admin account the campaign is published in. If you would like to adjust this timeline, select the **Content** tab, then for each message, click the **Edit** (pencil icon) button, select new date and time settings, and click the **Save** button.