

# Drip Email Campaign Planning Worksheet

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*Campaign Title:*

Email 1	Email 2	Email 3	Email 4	Email 5
TOPIC:	TOPIC:	TOPIC:	TOPIC:	TOPIC:
POINTS TO COVER:	POINTS TO COVER:	POINTS TO COVER:	POINTS TO COVER:	POINTS TO COVER:
CALL TO ACTION:	CALL TO ACTION:	CALL TO ACTION:	CALL TO ACTION:	CALL TO ACTION:
SENDING SCHEDULE:	SENDING SCHEDULE:	SENDING SCHEDULE:	SENDING SCHEDULE:	SENDING SCHEDULE:
ASSETS NEEDED (OPTIONAL):	ASSETS NEEDED (OPTIONAL):	ASSETS NEEDED (OPTIONAL):	ASSETS NEEDED (OPTIONAL):	ASSETS NEEDED (OPTIONAL):

# SAMPLE: Drip Email Campaign Planning Worksheet

Campaign Title: *New Lead - Got a Quote*

Email 1	Email 2	Email 3	Email 4	Email 5
<p>TOPIC:</p> <p>WELCOME - MEET YOUR AGENT</p>	<p>TOPIC:</p> <p>HOW TO READ YOUR QUOTE</p>	<p>TOPIC:</p> <p>WHY IT'S IMPORTANT TO ACT NOW</p>	<p>TOPIC:</p> <p>OTHER POLICY TYPES THAT MAY WORK FOR YOU - NON-MED</p>	<p>TOPIC:</p> <p>CAN I ANSWER ANY QUESTIONS?</p>
<p>POINTS TO COVER:</p> <p>I'M HERE TO HELP - CONTACT W/QUESTIONS</p>	<p>POINTS TO COVER:</p> <p>-MONTHLY VS. ANNUAL -FINANCIAL RATINGS</p>	<p>POINTS TO COVER:</p> <p>RATES IN QUOTE NOT GUARANTEED - LOCK THEM IN NOW!</p>	<p>POINTS TO COVER:</p> <p>GET COVERED FASTER - NO EXAM</p>	<p>POINTS TO COVER:</p> <p>DON'T WAIT - I'LL MAKE TIME FOR YOU</p>
<p>CALL TO ACTION:</p> <p>CALL ME</p>	<p>CALL TO ACTION:</p> <p>READ MY BLOG POST</p>	<p>CALL TO ACTION:</p> <p>CALL ME</p>	<p>CALL TO ACTION:</p> <p>LEARN MORE ABOUT NON MED</p>	<p>CALL TO ACTION:</p> <p>CALL ME</p>
<p>SENDING SCHEDULE:</p> <p>DAY 1 / ASAP AFTER QUOTE REQUEST</p>	<p>SENDING SCHEDULE:</p> <p>+ 2 DAYS</p>	<p>SENDING SCHEDULE:</p> <p>+ 4 DAYS</p>	<p>SENDING SCHEDULE:</p> <p>+ 6 DAYS</p>	<p>SENDING SCHEDULE:</p> <p>+ 8 DAYS</p>
<p>ASSETS NEEDED (OPTIONAL):</p> <p>LOGO &amp; PHOTO</p>	<p>ASSETS NEEDED (OPTIONAL):</p> <p>SCREENSHOT OF QUOTE &amp; LINK TO BLOG POST</p>	<p>ASSETS NEEDED (OPTIONAL):</p> <p>IMAGE - HAPPY FAMILY</p>	<p>ASSETS NEEDED (OPTIONAL):</p> <p>IMAGE - OUTDOOR ACTIVITY / HEALTHY</p>	<p>ASSETS NEEDED (OPTIONAL):</p> <p>LOGO &amp; PHOTO</p>