RISE

By MoxiWorks

Birthdays & Anniversaries

Celebrate Client Milestones, Automatically.



What It Does

RISE sends a personal email on each contact's birthday and house anniversary, then sends it again every year.

Why It Matters

- Stay relevant between transactions
- Celebrate past clients year after year
- Add a personal touch automatically
- Set it once and it runs every year

Before You Start

Add a Birthday and House Anniversary date to your contact records. Only contacts with a date on file get the email.

Quick Setup

1. Go to Campaigns > Create Campaign > Select a pre-built Birthday or House Anniversary campaign
2. For your audience, select All Contacts
3. Review the email
4. Click Start

That's it. RISE sends each email on the contact's date, every year.

Have other key dates? If you've added dates like a lease renewal or a client's work anniversary to your contacts, you can build your own campaign that repeats every year on that date.

Common Question

"Do I need to restart it every year?"

No. Once it's running, RISE sends on each contact's date every year, with no re-enrolling.

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