

Building a Campaign in GHL

1. Create a Tag

Tags are used to trigger and organize campaigns.

1. Go to **Settings**
 2. Click **Tags**
 3. Select **Add Tag**
 4. Name your tag
 - o Example: thank-you
 5. Click **Save**
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2. Create a Campaign

You can either:

- Use a prebuilt template, or
- Build a campaign using AI

To Create the Campaign:

1. Go to **Automation**
2. Click **New Campaign**

Using AI to Build the Campaign:

Describe exactly what you want the automation to do.

Example prompt:

“I want a campaign that reaches out to agents at the end of each month to thank them for their business when the tag ‘thank-you’ is added. After the agent receives the email, remove the tag and remove them from the campaign.”

After the Campaign Is Generated:

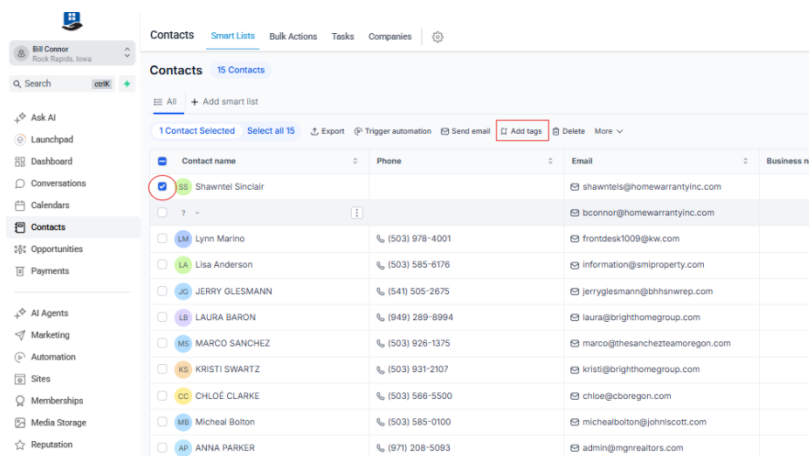
- Edit the email wording
- Adjust timing/cadence
- Add or remove steps as needed

3. Add Contacts to the Campaign

Tag Existing Contacts:

1. Go to **Contacts**
2. Use the checkbox on the left side to select contacts
3. (Optional) Use filters to narrow down contacts
4. Click **Add Tags**
5. Select the tag connected to your campaign

Once the tag is added, the contacts will automatically enter the campaign.



Tip:

When uploading contacts into GHL, you can assign tags during the upload process so you don't need to tag them later manually.

Example Workflow

1. Create tag → thank-you
2. Build campaign triggered by the thank-you tag
3. Select contacts and apply the thank-you tag
4. Campaign sends automated thank-you email
5. Automation removes the tag and ends the campaign