Conditional campaigns

The **Campaigns** module in Genesy allows you to automate the communication with the Contacts of your interest according to specific conditions that you set. The goal of a campaign is to get a response from a lead.

In this step-by-step guide, you will learn how to create and launch a campaign with Genesy.

#

📽️ Process video

To access this module, you must:

- Go on the left side menu, click Campaigns.
- Inside the Campaigns module, click on **+ New campaign**, on the top right.

Let's see now the step by step process:

Step 1 - Details: Define your campaign details

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726177/a9b8ba8bcb72918cf243cce61564/AD*4nXdXbA-bbWAZhMQbBny9Hq3tjtXvAn3jr47jidZ7skP6NbFXb4QubrFwHtmbKoi2D*NoNtx-YYAa813cmIzfyVbWN8Yu08O5LqdlU1wVrjrIVyb-ctzNKLdAo21zDGlGR378Tc4v?expires=1770309900&signature=a1a5d296486c4744b0518fd0126b613109c53afcd25223689fcdf85bb0956f0b&req=dS

In the **Details** page you can fill in the following:

- **Campaign name:** This is a mandatory field. Give a name to the new campaign.
- **Campaign description:** Write an optional description of your campaign.
- **Campaign Identity:** This is a mandatory field. Assign your Genesy identity to link you to the campaign.
- **Campaign prioritization:** Define the priority of the campaign, it is used to determine which one is executed first in LinkedIn, in case you have other campaigns ready to run or already running for the same identity.

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726174/4cbe3e4d099423f70973db47d965/AD*4nXewSydBKZe
rVcep39km6hYIr7iT*YYR28M-*4uRXd7BpbhsTnu8dh*-baDVKI3ksVZLP8uqXMt1ykQuRmHWDcc4Wvn8AJqkrNnwfUkd4v8qWQ-iZ0V1A?expires=1770309900&signature=96cd301d31cfe92aa231e6070ea624e725d1c6661e48b6022701e24609a40ff3&req=dS

5. **Campaign CRM Sync Settings:** Enable it optionally if you have your CRM integrated with Genesy and you want to record conversations.

6. Advanced Campaign Tracking Settings: Choose optionally if you want to:

- **Add tracking pixel to emails:** Track if the recipient Contact has opened the email sent within the sequence
- **Track email links:** Track if the recipient has clicked on a link attached to a personalized message

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726173/20051c9e566c2574a2e765d4abb3/AD*4nXeNo0mIP-U4jhWKApefmAA*3*cDnQzfPjzJ8kcqjm8rV8dHrcK*0IqvcGjc2TD3xrt-7s-azx45GiI8BBXRKt-erVx-fCuO4R47ZaISQAfqKNa6jWX9sM4m-X6zHAFQqJdqgIEw?expires=1770309900&signature=dd9da8a1b8405d22141a8fd5ea8a53ffde52726a975d9f0d2dbe03451cc48e51&req=dS

Step 2 - Sequence: Define campaign sequence

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726176/61c9fc101bc464a82c589d44a26f/AD*4nXcHae6cP718e*
R7tNRQWIC43AWISm87jZwIzZrKeB66IDmIsgI83WeNfBxoDxyPfKoZnx2HWQBa0KnkoUEX?expires=1770309900&signature=131ebe731d7f00ee5715f4173c632119691d850d8c8b19246dc4513091831035&req=dSQ

In this step you will create your sequence, designing the logic of actions and conditions as you wish, from Start to End. Add to the sequence all the steps you want it to execute:

Press + to add an Action (Actions) or a Condition (Conditions).

The sequence will advance from one step to the next as long as the lead does NOT respond to one of the messages. The goal of the campaigns is to get the leads to respond. If a lead responds, the sequence stops for that lead.

⚡Available actions:

- **Visit Profile**
- **Like Last Post**
- **Send LinkedIn Connection**
- **∗LinkedIn Message**
- **∗LinkedIn Inmail**
- **LinkedIn Attachment**
- **Voice Message**
- **∗Email**
- **Task**
- **Add to another campaign**

** In this actions you may choose:*

- A. **AI:** Use message-generating AI variables*

∗B. **Manual**: Write a manual message, personalized with the variables of your choice (e.g name, company name...)*

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726178/16e92b7bbfb7981947c1c9c2bcbf/AD4nXcAApzvh0ZXbI
m9OFXOurrdV1mla0jzKFdkR23KfBNjA20c6GMCPiBrhx81DEnIL86CdN7Gbqp9MjE-
Vw7AVdkvOyG1wkQNCFCVdf0cVz_Na0EmkYH4U7iv77Li-lbH7aQ?
expires=1770309900&signature=a68e5f401772e6c65a6eb3969ac30ac6863be61fdc3ed74e10759539015338ae&req=d

To define WHEN you want the action to be executed, you need to click on

Action immediately (top of the action box) and define an amount and unit (seconds, minutes, hours, days)

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726167/e803b02e7ce81803af7b50824f99/AD4nXeOs2n1I5ZZW
DB4P1VxltpE9SE6cqzUhzysSs48zi1BUOKyFwQfbUvTVUmxeZv-OVjCrQ-
SN8o43aEIjUPaHemyq5I9hkOptJSyNNoRrTnWVbEI8zMM0CRHnt5ekITk2IsmA?
expires=1770309900&signature=2e727b6d5d2e9f3aec266d70fdf4c4e9c25ffebdf3e18145a9039e5146d0c4ce&req=dS

✅/❌ Available Conditions

Conditions branch out the path in two, depending on whether the condition is met: **Yes** or **No**.

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726170/cc8530d9da6afb522aef5837be20/AD4nXc1iztQr909g6
D150AmxPfIJ1s8Uoz0bgAu9cZT-
OpXO0FzAJOwzcvaf1w2forLgRweXIszfizm4Mmo2ANkObcd02dstTI6os6sEVZTzcR0CgoQbDC4WLTAhqi5w2_Q5eA?
expires=1770309900&signature=455b2557ef22604eb82c8d879f817cd248fbddf77fba3cffa66bc6f3bef90598&req=dSC

- **Has LinkedIn Profile:** Does the lead have a LinkedIn profile?
- **Has Professional Email:** Does the lead have an email address?
- **Has Mobile Phone:** Does the lead have a phone number?
- **Custom condition:** Customize a condition based on a variable of your choice.
- **Accepted LinkedIn connection:** Has the lead accepted the connection request in LinkedIn within X days?
- **Is already a connection:** Is the lead already a LinkedIn connection?

What happens when the lead replies?

If the lead responds at any step, the sequence will stop.

If you want the AI to suggest what to answer, or even continue the conversation automatically, activate the **Continue the conversation with AI** checkbox (top left).

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1448298510/68bd03da13aa0b572b96220e1801/image.png?expires=1770309900&signature=f4dbea8cdb0b6388c3f3d7e90bca0983589412601ad9e52bd05e978de9be2321&req=c

And choose your preferred mode:

- 💡 **Copilot :** AI will suggest what to reply, but needs your confirmation to send the message.
- ✨ **Automatic:** AI will reply automatically.

You can choose and modify the prompt that the AI will use in this conversation by clicking ✎ **Prompt.**

When you have finished crafting your sequence, you may go to the next step by clicking **Next** (bottom right of the screen)

Open to see an example of a sequence

Imagine you want to run a campaign that starts by evaluating if the lead is already or a connection of yours on LinkedIn

If it is, it will send a message

If it is not, it will send a request

If the request is accepted within 15 days, it will send a LinkedIn message

If it is not, and the lead has email, it will send an email.

If it does not have email, and it has a phone, it will create a task for call.

If it doesn't have a phone, it will end.

This is what it would look like:

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726180/cfe6e6af5aa978e7cd5e938a83ec/AD*4nXcod2tqSMy6J*
expires=1770309900&signature=0274fc65fab8102f5853ce40a120943e3a558479d79b50e9052176cd9db20474&req=d

Step 3 - Target: Add contacts to the campaign

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726172/9f2438e0f5cd82495e1b489f6a24/AD*4nXc0gddr4FKYq*
W7EYety-nJK7VbInWd8eFD2PVwi*e8fo6e4t7NrUxbqrZryQdMULzOPPBA*mV0FNwudX3wUHfpGZ82GVGID_QhybYQIC-
ixzVxo3Ccs1Zw?
expires=1770309900&signature=910ee1d3a6658e0a7676ec60d6d1f51e0f817ae273100f780e7fde09585a5738&req=dSC

In this step we are going to add to the campaign the leads that we want to reach out to.

It is not mandatory to do it from here, you can also do it directly from the **Contacts** page.

There are two options:

- **Contacts from list:** Select it if you want to extract all the contacts from a list at once. Choose the list from which you want to add all the contacts to the campaign and click on Submit
- **Contacts individually:** Select it if you want to filter in the complete contacts view and add them individually.

Step 4 - Review: Review and launch the campaign

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726168/48ca7c2a32f61ac3f1da93947177/AD*4nXdMlu*cPny8Cs8
ZE8QXgmf78-
9cb2CxDs4ok7bnYRtG45oXZYKqDd5la_a0HI7qYRPFeRbLvrBNqWO0DW0tuRPMzjYc1fS1nlxZn2ng8eS6ELejLvWdaw?
expires=1770309900&signature=0f8881d157f60938b87229e6be2b1d19434cddd85354b42e38ee42f57285f53d&req=d

In this last step before launching the campaign, you will see a summary of what you have configured in the previous steps.

If everything is to your liking, you can launch the campaign by clicking **Launch campaign.**

Your active campaign will appear under Campaigns > Active. Select it to see its progress and results so far.

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726164/4c5fd39c043664e81d555e05df60/AD*4nXcMwYadrJB6*
SakmdGWv3p8U-PYBYLbjEQXOCj9PMsr5pEkmTG9RV34yxrDv55nY011fblDaYQ7xYVs6rPr7GPw?
expires=1770309900&signature=d591c4d023da0ccb5ef7a0e0e82c0e02e040e207bbc0cce6c2baa17b1116993a&req=d

Best Practices for LinkedIn Messages

When reaching out to someone on LinkedIn, one highly effective approach is to break your message into smaller chunks and send them over a short span of time, rather than dropping a long, structured pitch all at once.

Take this example:

Instead of sending a full message like:

"Hi {first name, sorry for the direct approach — just wondering, do you happen to spend a lot of time each week updating Excel sheets? I'm asking because at Acme, we help HR professionals digitize administrative tasks. Mind if I ask you a couple of quick questions to see if we could help you reclaim up to 8 hours a week?"

Split it into 3–4 short messages, 30 seconds apart:

- “hi {first name”
- 30 seconds later: “sorry for the direct approach — just wondering, do you spend a lot of time updating excel each week?”
- 30 seconds later: “i ask because at Acme we help HR professionals digitize admin tasks — can i ask you a couple of questions to see if we might help you win back 8 hours a week?”
- 30 seconds later: “if it’s not a fit, no worries — i won’t spam you”

This approach works better for several reasons:

- **It feels human.** By splitting the message into short, lowercase phrases, you mimic the natural pace and style of someone typing in real time. This makes you more relatable and harder to ignore.
- **You acknowledge the awkwardness of cold outreach.** Rather than pretending it's normal to pitch out of the blue, you show empathy while clearly stating what’s in it for them.
- **You create a soft landing.** You're not pushing for a demo or a call upfront — you're asking for permission to ask questions, which gives the other person a sense of control. And you make it clear you’ll back off if it’s not relevant.

This tone is realistic, respectful, and focused on mutual benefit. It helps your message cut through the noise — and gets better results.

💡 Notice that the chunks of message can be created easily with AI variables. Let us know if you need some assistance with that!

FAQ

How do I save the process if I want to quit and finish the campaign later?

Throughout the campaign creation process you can close the campaign without any worries and come back later to complete it. It is saved automatically.

You will find it in Campaigns > Draft.

Click **Edit** and you can edit its details, sequence, and add contacts.

Click **Duplicate** to create a new identical campaign.

Click **Launch** to start the campaign.

Click **Delete** if you want to delete the campaign.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726165/a174e4a7d9db2d2c5ce4145f2842/AD_4nXdnjkE-ZVkKzIqJBObH7Alo0Mb8pxx2-BUtkT9cs0fGIZWcKWW3WXlzSIVTLxrhtWwHQdXVYeIxvuEH0RjVZmE3e3xy6o3bCHVUC2CzVGRwi5JEzaOauUvP6tkIG
expires=1770309900&signature=08bfd03cdfcc565127f21738bc8ced410b0ad401175dc8b34496ed34b28b7ceb&req=d

Can I edit a campaign after it has been launched?

Yes, you can modify the parameters of an active campaign. However, please note that the changes will apply to future interactions and will not affect those already made.

To do so, go to Campaigns > Active, select the three dots next to the active campaign you want to pause and select **Edit**.

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726169/3b4c409dc7bda1b4c495c400051a/AD_4nXcOhnSE5bn
expires=1770309900&signature=e6c79a1f026e2b90b6a8672ea349a89d073e179f0f47b7c6fed26f2be48553e7&req=dS

How can I measure the success of my campaign?

Genesy offers analytics tools that allow you to monitor key metrics such as open rates, responses and conversions by channel and action. Use this data to evaluate performance and make sequence or content adjustments if necessary.

Select any active campaign under Campaigns > Active to view its performance.

Is it possible to pause an ongoing campaign?

Yes, you can pause a campaign at any time from the Genesy dashboard, this is useful if you need to make adjustments or temporarily stop interactions. This is useful if you need to make adjustments or temporarily stop interactions.

To do this go to Campaigns > Active, select the three dots next to the active campaign you want to pause and select Pause.

![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1446726175/7978f4eac0f01d1508d5c25511c7/AD*4nXcW0wsio8k2IK*
O2o2h*uElRkl*sIBvHiBD2Qt9Bql8Mv6OnKD0edrJ_NvA?
expires=1770309900&signature=a32886f12bf7820b281f5123381b8ea69de4a7c3adbe78e0e1bd5e0914168a82&req=dS