Campaign Builder Lead Management Playbook

Document Purpose

This document provides a framework for likely use cases and best practices when leveraging lead management fields in campaign builder, including recommended inclusion and exclusion rules. The recommendations below assume pre-existing knowledge of campaign builder functionality and its primary use cases.

Examples

Active leads in an Unconverted Stage

Use the **Lead Management: Created At** inclusion rule to select a specific date range, then use the **Lead Management: Lead Stage** rule to identify leads that have not moved into a converted stage.

Unconverted Customer Intelligence Leads

Use the **Lead Management: Lead Source** inclusion rule and select the customer intelligence opportunity you want to send messaging based on, then select the **Lead Management: Lead Stage** rule to include unconverted lead stages or exclude converted lead stages. You can also choose to use the **Lead Management: Created At** date rule to select only leads from a specific period of time.

Low or High Credit Rating

Use the **Lead Management: Credit Rating** rule and select **Poor** to send credit improvement or informational messaging. Or **Excellent** with this rule to send high-touch messaging and keep leads engaged. Add the **Lead Management: Created At** date rule to select only leads from a specific period of time.

Inclusion Rules (2) ❓		+ Add Rule
Lead Management: **Credit Rating** is **Poor**	🗑	✎
Lead Management: **Created At** is **from 2026-01-01 to 2026-01-31**	🗑	✎

General Campaign Builder Best Practices

Campaign builder is an email-only broadcast tool, so the following exclusion rules are best practices for all campaigns that you set up using this feature:

Exclusion Rules (3) ❓		+ Add Rule
Contact Information: **Valid Email Address** is **no**	🗑	✎
Email Activity: **Historical Email Activity** is **Bounced** or **Failed** or **Unsubscribed** or **Complained**	🗑	✎
Contact Information: **Silenced Communication** is **on**	🗑	✎