

# Strategy Wizard transition ⚡

This article applies to:

## FAQs

### What is the Strategy Wizard?

The Strategy Wizard was a way to create email templates within the Campaigns section of the application. Customers have not been able to create new Strategy Wizard templates since November 2019.

### How do I know if I'm using a Strategy Wizard template?

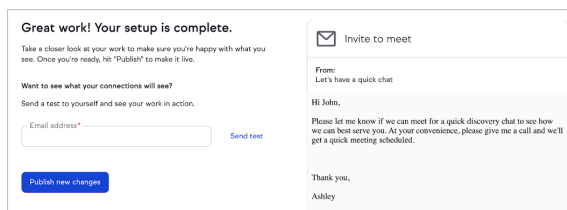
Strategy Wizard templates are indicated by a lightning bolt on the icon associated with the campaign. Another indicator is a pop up when clicking on the campaign name which asks if you would like to add contacts or go to the email template.

### What action do I need to take to keep my Strategy Wizard emails?

If you'd like to use the content in those templates, you will need to copy and paste the content into email templates in Keap application.

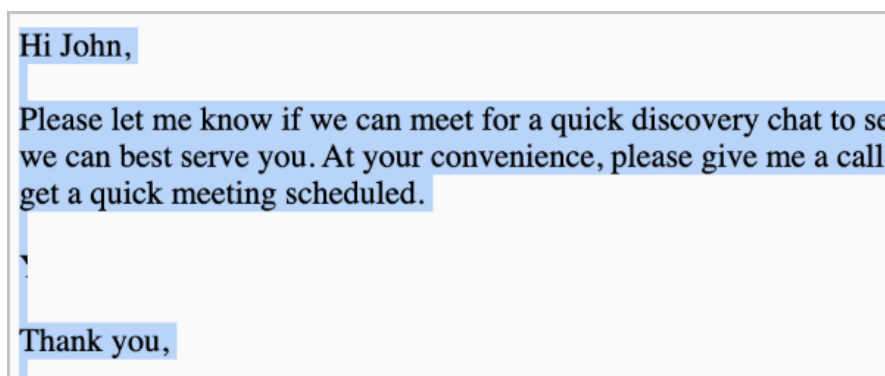
## How to continue using Strategy Wizard emails

1. Navigate to **Campaigns**
2. Click on the strategy in the campaign list

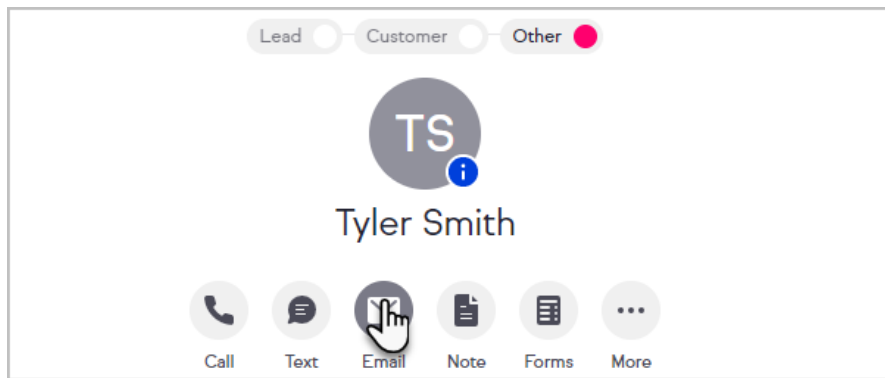


The screenshot shows a confirmation dialog box with two main sections. The left section contains a success message: "Great work! Your setup is complete." followed by instructions to "Publish" and a "Send test" button. Below this is a form for "Email address\*" and a "Publish new changes" button. The right section shows a preview of an email titled "Invite to meet" with a "From:" field, a subject line "Let's have a quick chat", and the body text: "Hi John, Please let me know if we can meet for a quick discovery chat to see how we can best serve you. At your convenience, please give me a call and we'll get a quick meeting scheduled. Thank you, Ashley".

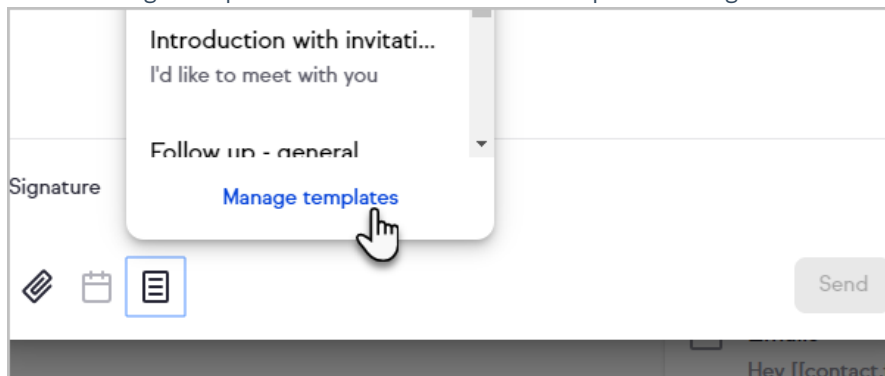
3. Highlight and copy the content in your email



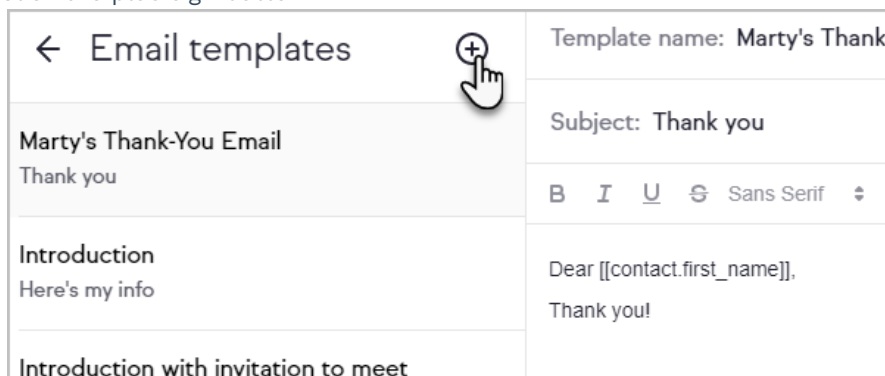
4. Navigate to your **Contacts**
5. Select a contact
6. Click the **Email** button



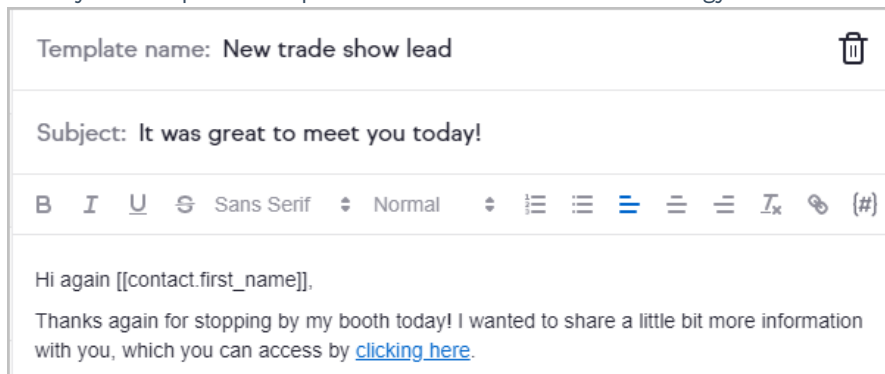
7. Click the Template button at the bottom of the email form
8. Select Manage templates to access the email template manager



9. Click the plus sign button

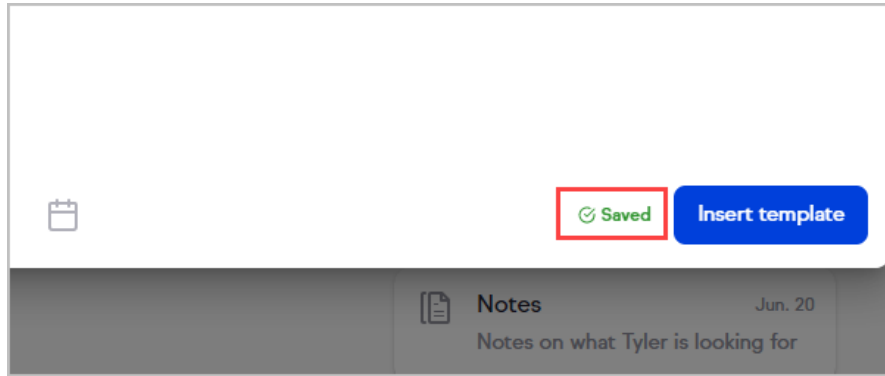


10. Name your template and paste the content from the strategy



11. When you're finished, click the Insert template button to use the new email template or the back arrow at the top of the email template manager to return to your email. This template will now show up in the templates area of your emails. Your template will save automatically,

indicated next to the Insert template button.



**Note:** You can also save this as a template in the advance broadcast builder.

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