

RECOMMENDATIONS TO COMPLETE WITHIN 30 DAYS

Goal: Complete initial set-up of Your Company in ActiveCampaign.

ActiveCampaign Account Assessment

- ☐ Review the existing ActiveCampaign account and evaluate initial setup for completeness, identify account issues, and confirm that My Your Company is on the appropriate billing plan.

ActiveCampaign Account Setup/Update

- ☐ Complete basic account configuration.
- ☐ Contact migration from existing CRM.
- ☐ Setup of list structure and segmentation.
- ☐ Create a subscription management page.
- ☐ Setup of tag structure.
- ☐ ActiveCampaign site tracking installation on the website.
- ☐ Setup of single, lead generation form on the website using Thrive Leads.
 - ☐ Update newsletter sign-up to be product information.
 - ☐ Update coupon code lightbox to increase conversions.
- ☐ Setup of double-opt-in, email confirmation automation.
- ☐ Design of a single campaign template.
- ☐ Setup of a new lead welcome series automation with three emails.
- ☐ Setup of engagement management automations.
- ☐ Create a workflow flowchart.
- ☐ Documentation of any customized system setup.

New Customer Welcome

- ☐ Create a new customer welcome sequence that further develops the relationship when someone has made their first product purchase.

General eCommerce

- ☐ Update/add leveraging ActiveCampaign:
 - ☐ Browser abandonment
 - ☐ Cart abandonment
 - ☐ Payment fail

Expected Result: Custom ActiveCampaign account set up so that you can get started with marketing campaigns and triggered automation in your business.

RECOMMENDATIONS TO COMPLETE WITHIN 30-60 DAYS

Goal: *Develop targeted communications that allows you to segment your customers, promote the appropriate products to them, and then provide a “white glove” experience, once they buy.*

What's Your Your Company Quiz:

- ☐ Develop quiz to use on website and at live events to help individuals identify their own problems/pain points with recommend Your Company products.
- ☐ Create segments with in ActiveCampaign.
 - ☐ Create specific welcome sequence + special offer for each segment.

Product Launch Strategy

- ☐ Create a promotion strategy for each new product launch; templize so that it can be used over, and over again.

Post-Purchase (for each product or product group)

- ☐ What you will receive
- ☐ Instructions to use
- ☐ Additional products that will support

Post-Delivery (for each product or product group)

- ☐ Net promoter automation (review & recommend)

Expected Result: *Increased customer engagement and product usage leading to a measurable increase in success stories and referrals, resulting in additional sales.*

RECOMMENDATIONS TO COMPLETE WITHIN 60-90 DAYS

Goal: Create a streamlined strategy for email marketing that leverages/shares content from other media and further encourages audience brand engagement.

Broadcast Email Strategy

- ☐ Create a broadcast email strategy and plan, emailing up to 1-2x/week
 - ☐ Campaign development internal team workflow
 - ☐ Subscription management strategy (the contact's ability to opt-in/out of different campaign types)
 - ☐ Integration of interest tagging
 - ☐ Campaign schedule
 - ☐ Campaign design, development, and scheduling
 - ☐ Campaign reporting
 - ☐ Link to content marketing (blog) and social marketing (Facebook, Instagram, etc.) strategy

Promotion Email Strategy

- ☐ Create a promotional email strategy and plan, emailing up to 1x/week
 - ☐ Promotional email development internal team workflow
 - ☐ Subscription management strategy (the contact's ability to opt-in/out of different promos)
 - ☐ Integration of deadlines/timers for promotions
 - ☐ Promotional schedule
 - ☐ Campaign design, development, and scheduling
 - ☐ Promotion tracking strategy and reports
 - ☐ Link to new product launch plan.

Customer Only Communications Strategy

- ☐ Create a promotional email strategy and plan, emailing up to 1x/week
 - ☐ Customer only email development internal team workflow
 - ☐ Subscription management strategy (the contact's ability to opt-in/out of different communications)
 - ☐ Communication schedule
 - ☐ Campaign design, development, and scheduling
 - ☐ Tracking strategy and reports

Expected Result: Increased engagement across all stages of the customer value journey, resulting in an increase in direct sales as well as creating brand advocates.

ADDITIONAL RECOMMENDATIONS (ONGOING)

Customer Avatar and Before & After Grid

- ☐ Complete the *Customer Avatar* and *Before & After Grid* for each of the Personas:
 - ☐ Male
 - ☐ Female
 - ☐ Pet owner
 - ☐ Wholesale/supplier

Customer Value Journey

- ☐ Create a Customer Value Journey for each of the personas.

Membership/Subscription

- ☐ Create membership/subscription similar to Amazon Subscribe and Save where customers can have “set it and forget it” for their most used products.
- ☐ Create automations:
 - ☐ Promotion
 - ☐ On-boarding
 - ☐ Reminders
 - ☐ Post-purchase