

# ACTIVE CAMPAIGN CHECKLIST



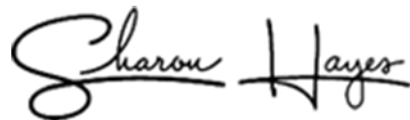


## INTRODUCTION

ActiveCampaign is a wonderful autoresponder system with a lot of features of the more well-known high dollar systems for a fraction of the cost. It's a system I highly recommend and one we make heavy use of.

While the interface is easy enough to follow, due to all the functionality of the system, it can be difficult to remember all the steps for handling various tasks. To help ensure you handle what you need to when creating emails, lists and forms within ActiveCampaign, I've put together this blueprint to help clearly define the steps involved and things to remember as you go through them.

Note that while this blueprint will touch upon Automations, it will only be for basic use of them and not intended to cover all uses of them.



### INITIAL SETUP IN ACTIVE CAMPAIGN

When you first start an Active Campaign account and get acclimated to the system, you'll want to take stock of what you might use it for. Below is a handy list indicating steps for initial setup and where you would look for setting up certain things.

ACTION	NEEDED	WHO?	SET-UP?
Time Zone: Set this within Account Information			
Sender Address: Set to something you'll want shown on each email			
Taxonomy: Develop taxonomies (structure) for naming of your lists, tags and campaigns so they'll be easier to follow later			
Set up the lists you need for your newsletters and funnel autoresponders			
Set up tracking on site in My Settings > Tracking (important for triggers based on pages visited on site)			
Create the email templates you need (the easiest way is to simply design the email using their header, then saving as a template)			

Set up tags accordingly for tracking contact status or to help show information at a glance that lists the contact is on would not			
Set up autoresponder emails for your newsletters and funnel autoresponders			
Need to send autoresponder emails at a particular time of day? Set those up within Automations			
Want contacts added/remove from lists or tags to get emails? Set up Automations			
Want to use it as a CRM? Set up Deals within the Deals section and the appropriate “stages”			
Intend to use GoToWebinar? Set up Zapier Integration with your GTW account within Apps section			
Hooking it up with an ordering platform? Get the API info you need in the My Settings > Developer section			
Look within Apps section and Zapier for additional apps you use that you can integrate it with			

### LIST & FORM SETUP CHECKLIST:

ACTION	NEEDED	WHO?	SET-UP?
Want notifications of signups? Set within Advanced Settings			
Want signups to get an immediate email upon signup? Set up your first autoresponder			
Want signups to get added to additional lists or have tags added or removed? Set up an automation			
Set up a form for the list, making sure you mark fields required as needed (easy step to miss!)			
Set the list the form will add people to			
If double opt-in, go into the opt-in settings and modify the email as needed			
If single opt-in, turn off double opt-in			
Set the confirmation page URL to send signups back to a page on your site			
Style the form within Active Campaign OR otherwise make sure your developer strips the CSS from the form when adding it to the site			
Add the form to the site			

### EMAIL (CAMPAIGN) CHECKLIST:

ACTION	NEEDED	WHO?	SET-UP?
Name the campaign			
Set the list(s) the campaign will go to (don't forget you can create a segment to exclude parts of the list(s) as needed)			
Select the template for the email			
Create the subject			
Create the body of the email (note that the body text in ActiveCampaign shows significantly smaller than how it shows in email readers)			
Send a test email of the campaign to yourself			
Check the test email for design issues			
Check the test email for grammar issues			
Check all links in the test email			
All good? Proceed to the scheduling part and set the date/time of your email or delay of email if part of an autoresponder sequence			
Send the email (or save the email if it is an autoresponder)			