

ActiveCampaign Account Recommendations

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ActiveCampaign Account Overview

ABU Rates

	Last 90 Days	Notes
Total Contacts	81,740	👍
Active Contacts	74,501	👍
Spam Complaints	0.05% (1,012)	👍
Bounces	0.13% (2,487)	👍
Unsubscribes	0.18% (3,448)	👍
Opened	8.67% (163,418)	Below average: goal is 17-20%
Clicked	0.83% (15,663)	Below average: goal is 3% or greater

High-Level Account Assessment

Feature	Notes
Campaigns	Campaigns are sent on a consistent, weekly basis. However, campaigns that are sent to large groups of contacts (55k+ contacts) have low open rates (4-6%).
Engagement Management Automations	Engagement management automations were recently activated. Win-back (re-engagement) automation is not currently active.
Double-Opt In	Double-opt in does not exist.
Deals	Deal pipeline exists for coaching contacts only. Deal pipelines would allow a better overview of incoming leads, free trials, subscriptions, and member status.
Lists	There are currently 20 lists within the account. It is recommended that lists are consolidated into 3 primary

	lists; master list, special offers, and promotions and members only. This will allow you to segment your audiences and ensure the right content delivery to the right contacts.
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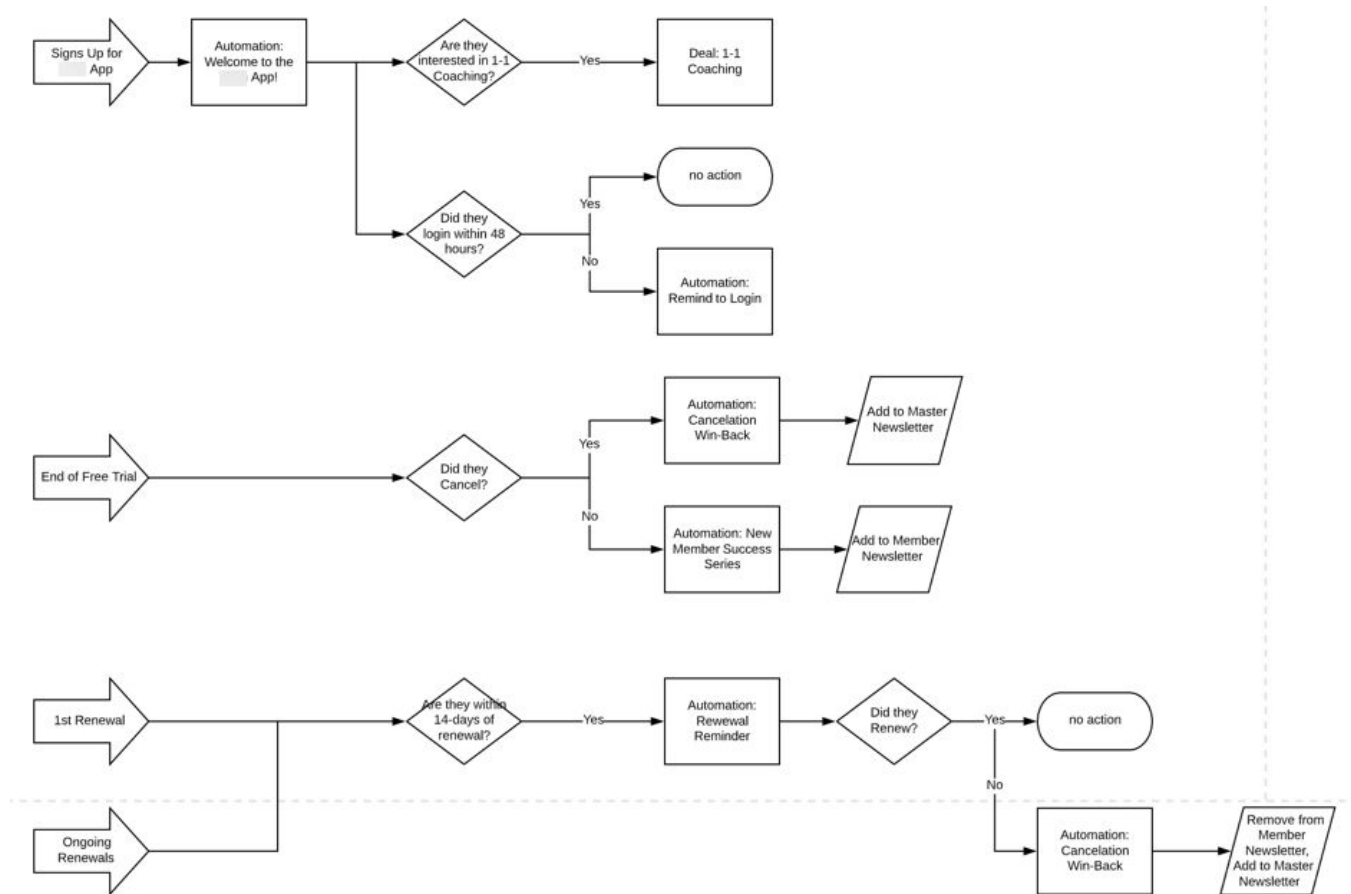
Priority #1: Track Contacts from the App into ActiveCampaign

Goal

Organize Contacts that are being pushed into ActiveCampaign from the app so that the following can be measured:

- Free trial sign-ups
 - From App
 - From Desktop
- Conversion: free trial to monthly
- Conversion: free trial to annual
- Renewals
- Cancellation before purchase (within trial period)
- Cancellation after purchase (after subscribing)
- Cart abandons (from Desktop only)

Workflow Overview



Deal Pipelines

Deal Pipeline > Free Trial to New Subscriber

The purpose of this pipeline is to monitor the activity of free trial to new subscriber accounts.

Deal win: Contact continues subscription past 7-day free trial and first 30-days of subscription (37 days total).

Deal loss: Contact cancels free trial, or within 30 days of subscription.

Stage	Description
Sign Up for Free Trial	Contains all Contacts currently in the 7-day

	free trial.
Onboarding Monthly (1st 30 Days)	Contains all Contacts that are in the first 30 days of a monthly subscription.
Onboarding Annually (1st 30 Days)	Contains all Contacts that are in the first 30 days of an annual subscription.

Deal Pipeline > Renewals

The purpose of this pipeline is to monitor the activity of accounts that are pending renewal. Renewals that are completed, will be tracked as a “won” deal.

Deal win: Contact renews subscription.

Deal loss: Contact cancels subscription.

Stage	Description
Within 14 days of Monthly Renewal	Contains all monthly member Contacts within the 14-day monthly renewal window.
Within 14 days of Annual Renewal	Contains all annual member Contacts within the 14-day annual renewal window.

Key Behavior Tracking

The following behaviors will be tracked from the app into ActiveCampaign via tags and custom fields.

Free Trial Behaviors

- Sign up
 - From App
 - From Desktop
- 1st time login
- Most recent login
- Canceled free trial
- Cart abandon (from Desktop only)

Purchasing Behaviors

- For each plan (monthly and annual)
 - Purchase
 - Subscription is canceled

- Subscription payment is declined
- Subscription payment is refunded

Tasks to Complete

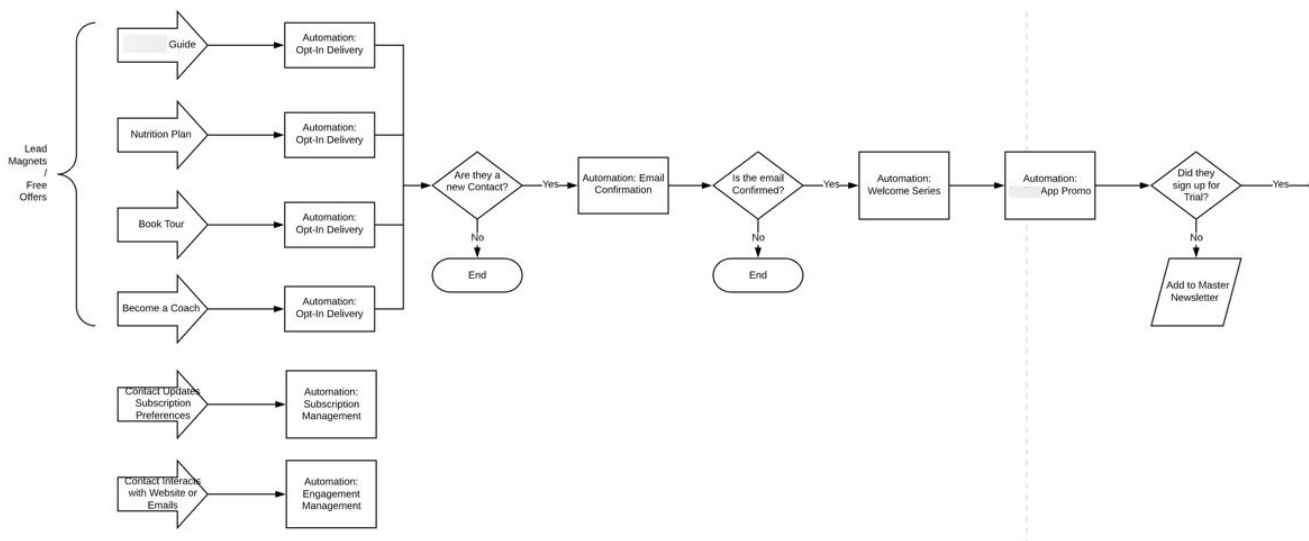
- Create behavior tag structure; submit to the development team for implementation
- Create/update automations:
 - Welcome to the app (7-day free trial)
 - Reminder to login
 - Cancellation win/back (within 7-day free trial period)
 - New Member Success (post 7-day free trial, first 30-days of subscription)
 - Renewal reminder
 - Cancellation Win-Back (post 30-days of subscription)
 - Payment declined
 - Abandon cart
- Create deal pipelines and integrate with automations

Priority #2: Boost Email Deliverability, Increase Opens and Clicks

Goal

Update the ActiveCampaign account set up so that overall deliverability increases along with email opens and clicks.

Workflow Overview



Deal Pipelines

Deal Pipeline > Lead to Free Trial

The purpose of this pipeline is to monitor the activity of a new lead to a free trial.

Deal win: Contact signs up for the app free trial.

Deal loss: Contact does not sign up for the app free trial.

Stage	Description
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Unconfirmed Contact	Contains contacts that have signed up for a lead magnet but have not confirmed email address.
Welcome Series	Contains contacts currently in the welcome automation.
App Promo	Contains contacts currently in the app promo automation.

Key Behavior Tracking

The following behaviors will be tracked in ActiveCampaign via tags and custom fields.

Lead Magnet Behaviors

- Sign up (name of Lead Magnet)
 - Free Guide
 - Nutrition Plan
 - Book Tour
 - Become a Coach

Tasks to Complete

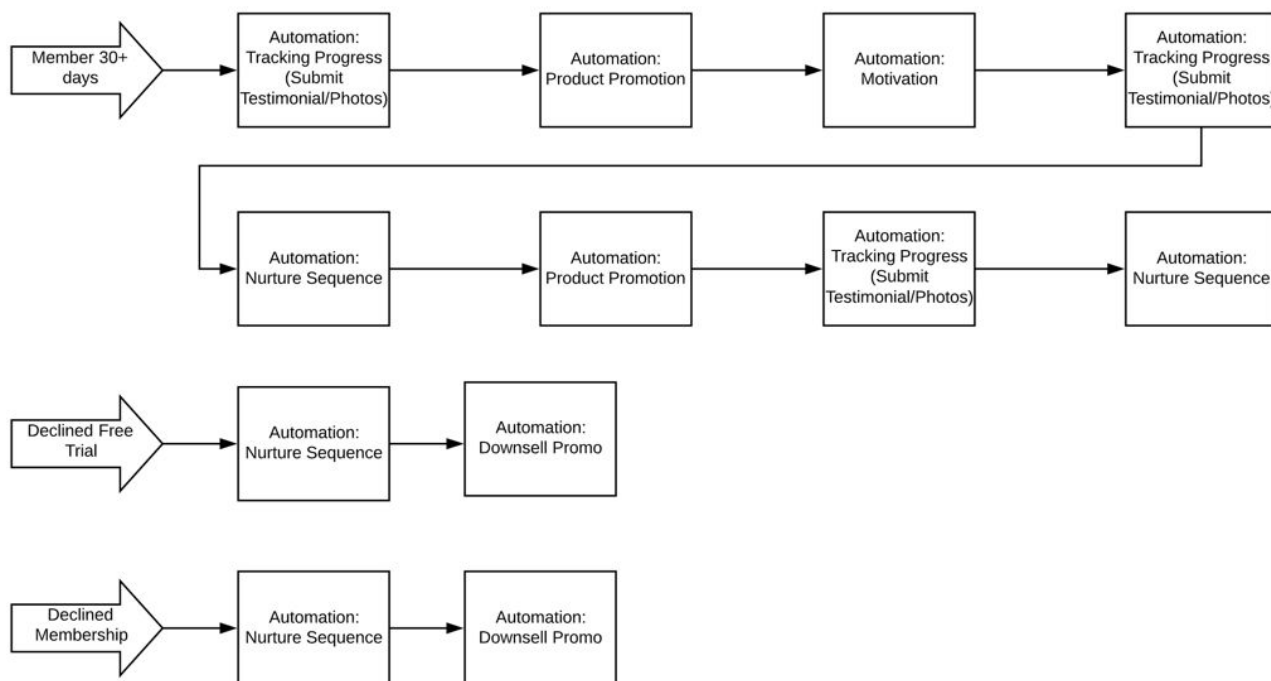
- Create a behavior tag structure
- Create/update automations:
 - Lead magnet delivery
 - Email confirmation
 - Welcome series
 - App promo
 - Engagement and win-back campaign
- Create deal pipelines and integrate with automations
- Cleanup/consolidate existing list structure
 - Master list
 - Customer only list (product purchase)
 - Members list (App subscribers)
- Create a campaign strategy for specific contact lists and segments

Priority #3: Present the Right Opportunity at the Right Time

Goal

Create a long term nurture sequence (30 days+) for app subscribers to keep them enrolled, engaged, and active in the membership.

Workflow Overview



Deal Pipelines

Deal Pipeline > Member Tracking

The purpose of this pipeline is to monitor the length of time that a Contact is a subscriber of the app.

Deal win: NA

Deal loss: Contact cancels subscription.

Stage	Description
Member 31-90 days	Contains contacts within 31-90 days of membership.
Member 91-180 days	Contains contacts within 91-180 days of membership.
Member 181-360 days	Contains contacts within 181-360 days of membership.
Member 1-2 years	Contains contacts within 1-2 years of membership.
Member 2-3 years	Contains contacts within 2-3 years of membership.
Member 3+ years	Contains contacts 3+ years of membership.

Note: the timeframes in this pipeline can be modified to what makes the most sense for the business to track.

Key Behavior Tracking

The following behaviors will be tracked in ActiveCampaign via tags and custom fields.

Membership Behaviors

- Member tagging based on the subscription start date

Tasks to Complete

- Create a behavior tag structure
- Create/update automations:
 - Member nurture sequences (may contain multiple automations)
 - Free trial down sell
 - Canceled membership down sell
- Create deal pipelines and integrate with automations