



# FINANCIAL ADVISORS

# **Business Development Service**

## Email Automation Process Flow

for

## Sign-Up Confirmations

### Introduction

The sign-up confirmation automation is designed to notify clients that they have successfully signed up for ongoing communication and can include useful additional information relating to your business, products and services. Three confirmations will be configured to cover Facebook, website and general sign ups.

We will create sign up forms in Active Campaign for Facebook and general sign ups. Wherever possible we will link your existing website forms to Active Campaign. If your existing website forms cannot be connected to Active Campaign, we will replace them with Active Campaign forms. If we cannot connect or replace your website forms, we will not be able to run this automation for website forms.

When a new contact submits any of the sign-up forms a new contact record will be created in Active Campaign, or their existing contact record will be updated (with any new or modified information). A tag will also be applied to their contact record, indicating which form they used to sign up.

### Required Data

The following data is required for this automation to work:

- First Name
- Email Address

### Process Flow

1. The automation will be triggered when one of the following tags is applied to the contact's record:
  - a. Facebook sign-up – when the contact signs up via your Facebook for Business page
  - b. Website sign-up – when the contact signs up via your website
  - c. General sign-up – when the contact signs up from anywhere the general sign up form is used

NOTE – the automation will only run once, the first time the contact signs up using any of the above methods.

2. When the automation starts a 'Sign-Up Confirmation' will be sent to the contact's email address. The message content will vary according to which sign-up form the contact used.
3. The automation will wait for 3 days.
4. The automation will check to see if the contact has opened the sign-up confirmation email.
5. If the contact has opened the email the automation will end.
6. If the contact has not opened the email, the sign-up confirmation email will be sent again.
7. The automation will end.

### Points for Consideration

This process above is intended to send immediate, personal follow up to contacts who sign up via your Facebook page, website, emails or other appropriate forms. The standard process described above can be extensively customised to provide useful information or other content as per your requirements.

Please contact us if you would like to discuss enhancements to the above process.

### Email wording

You can change the wording of the emails your contacts receive to suit your own personal preferences and writing style. We have included sample wording for the sign up confirmation email at the end of this document which we will use when setting the automation up.

Please let us have details of any changes you would like to make to the standard wording.

### Sample Wording

We have provided below some sample wording you may wish to consider for the email used as part of this automation. Please let us have details of any changes you would like to make to the sample wording.

### Sign-Up Confirmation Email

Hi [[First Name]]

Thanks for signing up [[via my Facebook page]] [[via my website]] [[to receive more information]].

We will only email you to provide information that we believe is genuinely relevant and useful to you – we understand how frustrating junk email can become. If you would prefer not to receive ongoing emails you can unsubscribe at any time.

If you've got any specific requirements or questions please feel free to reply to this email, or give me a call on [[Advisor Phone Number]].

Cheers

[[Advisor Name]]