Onboarding Automation Blueprint
From TheActiveMarketer.com

Below you will find the swipe files and psychology behind building a successful onboarding sequence for your new customers.

I suggest you isolate them from your broadcast messaging during this onboarding process to avoid confusion. This can be done either by using tags or having them on a separate 'onboarding' list until they have completed the sequence. Then you can remove the tags used to isolate them or move them to your main 'house' list.

To find out more about tagging you can download our free guide at http://theactivemarketer.com/taggingguide.

These emails should come from you or another real person in your business not a generic address like support@.

Most emails will have a P.S. at the bottom and contain a link we would like the customer to click on.

This serves two purposes. The P.S. is designed to train the customer to read all the way to the bottom. The links or questions are designed to get the customer to click or reply.

These two things should up the engagement factor on your email. Many email providers and spam vendors will see engagement as a signal that your email is legitimate and the customer wishes to receive it. This will help your email avoid the spam filters and move out of the Gmail Promotions tab and into the primary inbox.

For all the latest ActiveCampaign tips and marketing automation news join us over in the Automation Nation Facebook Group.

And click here to subscribe to the Active Marketer podcast

Email #1

Purpose: The purpose of the first email is to make the customer feel comfortable that there are real people and support structures in place to help them with their new purchase.

It is also designed to thank them for their purchase, frame expectations in regard to the rest of the emails in the sequence and direct them to the proper place to get support if they should need it.

Timing: Day 0. This email should go out straight away after the customer has made the purchase.

Copy:

Subject: Thank you

Hi %FIRSTNAME|TITLECASE%,

Thanks so much for choosing to [BUY YOUR PRODUCT OR SERVICE] we are looking forward to hearing about your [WHATEVER THE RESULT OF USING YOUR PRODUCT IS].

We want to make sure you are getting the most out of [PRODUCT or SERVICE]. So over the next 5 days we will be sending you 1 email a day to help you get started.

They will contain great tips on how to use [PRODUCT or SERVICE], some common mistakes you want to avoid and some best practices for getting set up the right way.

If you don't want to receive these golden nuggets just click the link below and we will leave you alone.

I want to go it alone, please take me off the email sequence >> [USE YOUR MARKETING AUTOMATION PLATFORM TO REMOVE THEM FROM THE SEQUENCE]

If you have any problems or need any support just send an email to [YOUR SUPPORT EMAIL ADDRESS] and we will get back to you as soon as we can.

As a [PRODUCT or SERVICE] customer you also get free access to [ANOTHER FREE RESOURCE TO GET THEM TO REPLY]. Just hit 'reply' to this email and let me know you want the [GIVEAWAY] and I'll send you your [FREE ACCESS CODE OR PRODUCT].

Thank Again,
[YOUR NAME]

P.S. Don't forget to check out [LINK TO OTHER RESOURCES THAT COMPLEMENT THE PRODUCT OR SERVICE].

Email #2

Purpose: To head off some common mistakes that new customers make. This also serves to reduce submissions to your help desk. You can look through your FAQs, emails and support desk software for ideas for this email.

Timing: +1 Day

Copy:

Subject: Watch Out For These Gotchas

Hello again %FIRSTNAME|TITLECASE%,

[A BIT ABOUT HOW YOUR PRODUCT OR SERVICE IS DIFFERENT TO OTHERS].

[COMMON MISTAKE 1]

LINK TO BLOG POST OR FAQ ON HOW TO AVOID THIS

[COMMON MISTAKE 2]

LINK TO BLOG POST OR FAQ ON HOW TO AVOID THIS

Hope that helps. See you tomorrow when we talk about [FIRST STEP IN THE PROCESS OF GETTING STARTED].

Cheers,
[YOUR NAME]

P.S. If you are scratching your head over any other concepts in [PRODUCT or SERVICE], just hit 'reply' and let me know.

Email #3

Purpose: Give the new customer the basics of how to get started. You want them to use your product and get great results. That is how you get referrals. The P.S. frames the future success they can achieve with your product or service.

Timing: +1 Day

Copy:

Subject: How to [ACCOMPLISH INITIAL KEY CONCEPT (i.e. setting up their account)]

Hi %FIRSTNAME|TITLECASE%,

There are lots of things you can do with [PRODUCT or SERVICE].

1.   [THE VERY FIRST THING THEY SHOULD DO]
[Explanation of how to do this with a screen capture]

2.   [ANOTHER KEY THING THEY SHOULD DO]
[Explanation of how to do this with a screen capture]

That should be enough to get you started [TOWARDS THE BENEFIT OF YOUR PRODUCT or SERVICE].

Tomorrow we will talk about how to [KEY CONCEPT OF THE PRODUCT or SERVICE].

Cheers,
[YOUR NAME]

P.S. If you are wondering what you can do once you are up and running check out what some of our other customers have achieved [LINK TO A CASE STUDY or TESTIMONIALS].

Email #4

Purpose: This explains a couple of advanced topics of your product or service. The real meat and potatoes. You want the customer to know what is possible so they continue to use the product or service and get the best results possible.

Timing: +1 Day

Copy:

Subject: Getting the most out of [PRODUCT or SERVICE]

Hey %FIRSTNAME|TITLECASE%,

Yesterday we talked about how to get started with a couple key concepts

Today we want to step it up a notch and show you what is possible.

1.   [A HIGH LEVEL FEATURE OR BENEFIT]
[Explanation of how to do this with a screen capture]

2.   [ANOTHER HIGH LEVEL FEATURE OR BENEFIT]
[Explanation of how to do this with a screen capture]

Cheers,
[YOUR NAME]

P.S. If you are still not sure on how to put this to work in your business just hit 'reply' and let me know and we can provide some assistance.

—- You can also repeat this type of email a few times in the sequence if there is a lot to learn—

Email #5

Purpose: Thank the customer and summarise what has been covered. You also want to steer them towards other ways to interact with your brand to help them stay a part of the tribe. This can be things such as your social media accounts, YouTube channel or podcast.

Timing: +1 Day

Copy:

Subject: Ready To Rock

Well that is it. You now have the basics of [PRODUCT or SERVICE] down and you are ready to go.

One of the many great things about [PRODUCT or SERVICE] is that there is always plenty more to learn.

So here are a few more resources to help you on your [PRODUCT or SERVICE] journey.

I run a blog over at [YOUR BLOG URL] where I share tips and strategies on a regular basis

I also have a podcast where I share a tip or techniques you can go away and use in your business. [LINK TO PODCAST]

You can also follow me on SOCIAL MEDIA @[SOCIAL MEDIA ADDRESS] where I share all the best about [PRODUCT or SERVICE]

Lastly join us on our [PRODUCT or SERVICE] Facebook page. [LINK TO FB PAGE]

As always if you have any questions or topics you would like to see covered, just hit 'reply' and let me know. I read and respond to every email.

Cheers,
[YOUR NAME]

— - Remove isolation tag or move to house list and begin send regular broadcast emails

Email #6

Purpose: To check in with the customer and make sure they are still using the product or service and to solicit referrals.

Timing: +1 Week after last email

Copy:

Subject: How is it going?

Hey %FIRSTNAME|TITLECASE%,

Well you have been using [PRODUCT or SERVICE] for a couple weeks now. I just wanted to see how it was going and if you needed any help?

I also wanted to let you know that we try our best to provide a personal touch with our services in an increasingly impersonal digital world.

We are very happy to say we get the majority of our customers by personal referrals from existing customers like you. If you know anyone who could benefit from our service, we would be delighted if you could refer them to us. [OR REFER THEM TO A PAGE TO LEAVE A TESTIMONIAL]

Once again don't hesitate to contact us with any questions.

Cheers,
[YOUR NAME]

That is it, no go forth and set up your killer onboarding automation and don't forget to join us over in the Automation Nation Facebook Group.