ActiveCampaign
CUSTOMER EXPERIENCE AUTOMATION
Study Hall
DIGITAL

Customer Experience Workbook

Welcome to the Digital Study Hall ActiveCampaign Customer Experience Workbook!

Coming at you from the comfort of your own easy chair, it's Digital Study Hall! You want to create great experiences that speak to your contacts, prospects, and customers. You want to create journeys that make them feel like you know exactly what they want — and can provide them with what they need.

You can craft those unique journeys with ActiveCampaign.

This workbook will teach you how; from creating your first automation, to fine-tuning a successful multi-part sequence, you'll learn concepts that will help you create the optimal journey for each contact. It's all about creating the ideal Customer Experience Automation — CX Automation for short.

No matter your experience or familiarity with CX Automation, this workbook hopes to spark your imagination. You'll go through the process of considering all of the ways that contacts experience your company, organization, and brand.

Let's brainstorm!

Excited to learn with you,

The ActiveCampaign Education Team

P.S. Don't forget, the Customer Success team is here to help! Thinking through concepts, turning diagrams into automations — use this workbook to help you prepare for a call, or simply spark a new conversation.

Table of Contents

Resources

This workbook is just one of the many resources you can use at ActiveCampaign; use this PDF to bookmark important links for your journey!

Live Resources

- Customer Success Team: The Success team is here to help you achieve just that — success with the ActiveCampaign platform. Book a free one-on-one, or reach out to your dedicated account manager, to talk through new ideas, build and edit automations, learn about features, and much more.
  - Online: https://www.activecampaign.com/training/
  - Email: success@activecampaign.com
  - Onboarding? Book here: https://calendly.com/ac-onboarding/onboarding/
- Support Team: Having trouble? Looking for a particular setting, or things not running how you expected? The Support team is available via the in-app chat.
  - Online: https://www.activecampaign.com/support
  - Email: help@activecampaign.com

Online Resources

- Courses: Learn more about the platform, and our approach to marketing and sales automation with courses. Check out this amazing free resource!
  - Online: https://courses.activecampaign.com/
- Education Center: ActiveCampaign tips, tricks, and use cases are available from the Education team. Go beyond the platform how-to's, and learn about the many ways you can use the platform for your business.
  - Online: https://www.activecampaign.com/learn/
- Help Center: Need to look up a particular setting? Want to learn the nitty gritty about a new feature? Our Help Center will answer your questions.
  - Online: https://help.activecampaign.com/

Welcome Checklist

If you're new to ActiveCampaign, or even if you've been with us awhile, we want to be sure you're on the right track. This checklist will help you ensure you have your account set up, and prepare you to build stellar automations, campaigns, and more!

Getting Started

- [ ] Watch: Getting Started with ActiveCampaign in 6 Minutes
- [ ] Add ActiveCampaign Users
- [ ] Add your Physical Address
- [ ] Set up and turn on Site Tracking
- [ ] Create a primary list
- [ ] Import your contacts

Education

- [ ] Brand new? Schedule a call with our Onboarding Team
- [ ] Been using AC for a while and want some help? Schedule a One-on-One
- [ ] Enroll in our ActiveCampaign Courses
- [ ] Bookmark the Education Center to find guides and resources
- [ ] Bookmark the Help Center to find support articles

Building Your Skills

- [ ] Create a Form
- [ ] Build a Campaign
- [ ] Craft an Automation
- [ ] Build a pipeline for Sales (or other processes!) in the Deals CRM

Community

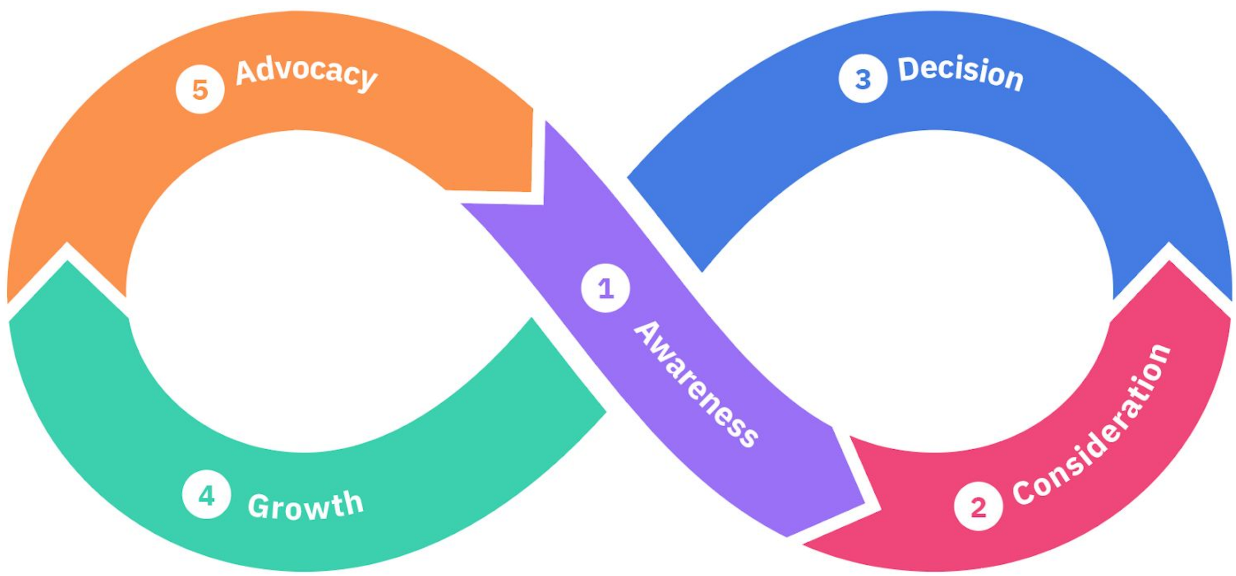
- [ ] Join the ActiveCampaign User Forum
- [ ] Join the Official ActiveCampaign Facebook Group
- [ ] Join the ActiveCampaign Slack Group
- [ ] Follow us on Twitter
- [ ] Follow us on Instagram

Start of Week 1

The Customer Experience Map

People experience your company in different ways. They come from various locations: your website, social media, online search results, advertisements, trade shows, networking events... anywhere your brand lives is a potential entry point for new contacts.

It's critical to take some time to focus on creating the ideal Customer Experience for all of your contacts. Thinking holistically about the continuous journeys your contacts will experience with your business will help you better understand what the most relevant content is for each of your audiences, making it easier to create a natural relationship.



Awareness

List the ways your prospects first hear about you below.

- Do you run paid ads? *Ex. - Facebook lead magnet ad, Google Adwords*
    -
    -
    -
    -
- Do you find leads in person? *Ex. - conferences, workshops, networking events*
    -
    -
    -
    -
- Do you focus on SEO? List your top ranking pieces of content. *Ex. - high-visibility blog posts*
    -
    -
    -
    -
- Other sources via which you advertise? *Ex. - radio, print, walk-ins*
    -
    -
    -
    -
- Do you get referrals or reviews? *Ex. - Yelp, Facebook reviews, referral program*
    -
    -
    -
    -

Consideration

Map out the content you have online and what it would mean if you learned a prospect looked at that asset.

Assets	What you learn
Example: frequently asked questions page on website	They probably have a question they want answered
Example: podcast about real estate agents using email marketing	They are probably a real estate agent or are interested in learning about email marketing

Decision

Let's figure out your buying processes.

- What distinct actions do you think a customer needs to take to know they're potentially ready to buy? *Ex. - schedule a call, look at enough content*
    -
    -
    -
    -

- What internal processes do you want to happen when you've identified someone is buyer ready? *Ex. - notify my sales team, send more sales-driven emails, call these particular leads*
    -
    -
    -
    -

What assets can you create that help customers see the value of what they bought?

What assets indicate a potential upsell opportunity?

Assets	What you learn	Upsell?
Example: product page about enterprise plan	Customer may have interest in enterprise plan	Yes
Example: video about how to use email builder	Customer is learning how the email builder works and is using it. Has a lower risk of canceling	No

From your existing customers, think about ways to build advocates for your brand.

- How do you identify who to push to a referral and who to push to a review? *Ex. - positive net promoter score, high engagement, attended an event*

- What specific review sites will give you the most buyer ready leads? *Ex. - G2 for SaaS companies, The Knot for wedding photography*

During the Awareness stage, you want to:

- Identify your most effective channels for capturing leads
- Better understand and target different customer personas
- Understand SEO and how you fit into your leads' research stage

During the Consideration stage, you want to:

- Track what educational content your leads engage with
- Understand your lead's needs on a deeper level
- Create a strategy for re-engaging cold leads

During the Decision stage, you want to:

- Create a sales/marketing funnel to track leads
- Prioritize qualified leads for targeted follow up
- Understand when and why contacts convert or fall off in the customer experience map

During the Growth stage, you want to:

- Create a customer onboarding journey
- Track customer adoption through activity or defined milestones
- Upsell and cross-sell customers at the right time

During the Advocacy stage, you want to:

- Identify top customers and engage with them
- Track and increase customer satisfaction and loyalty
- Better understand the impact of brand advocacy efforts

Review

The Customer Experience Map can take many forms, and follow many paths. You are creating a marketing and sales system that will:

- Introduce your brand to new prospects (Awareness)
- Tell them more about what you have available (Consideration)
- Encourage them to buy (Decision)
- Keep them engaged and wanting more (Growth)
- Turn them into Advocates

The **Advocates** of your brand are then a new path of **Awareness.** The customer experience grows and changes, but creating a continuum is key.

Your Customer Experience Map

Awareness	Consideration	Decision	Growth	Advocacy

Segmentation

Segmentation means grouping your contacts by attributes or actions. In ActiveCampaign, segmentation uses a combination of lists, tags, and fields, as well as contact behaviors that can be tracked within emails or on your website.

- **Attributes:** quality or feature of a contact
  - Examples: interests, budget, contact location
- **Actions:** customer behavior you can track
  - Examples: opened campaign, clicked link, visited page

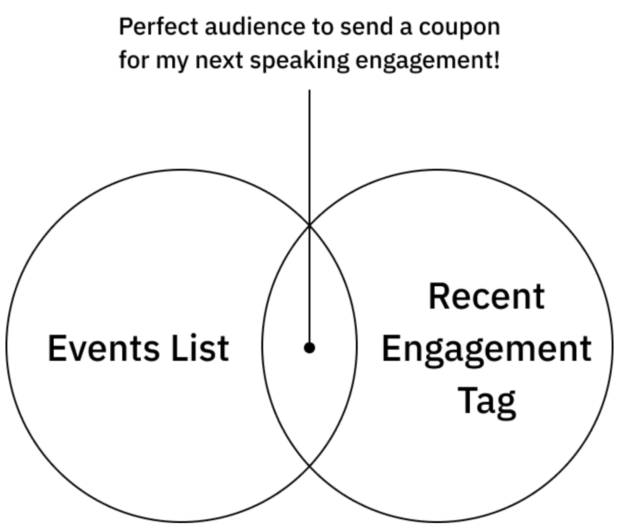
Segmentation helps you send the right message, to the right person, at the right time.

Segments as Diagrams

Creating your perfect audience gets easier when you think about how to set up your system beforehand.

Now that you've got it down, let's make some diagrams of the types of audiences you can create.

Example



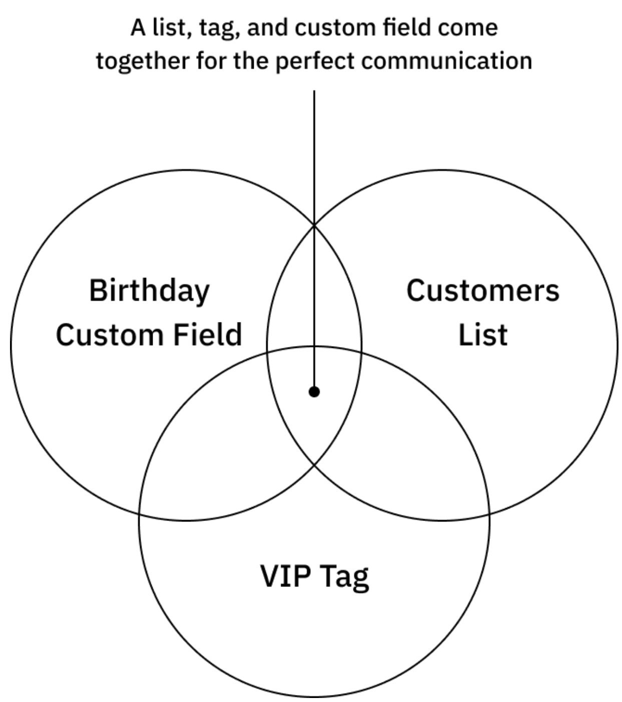
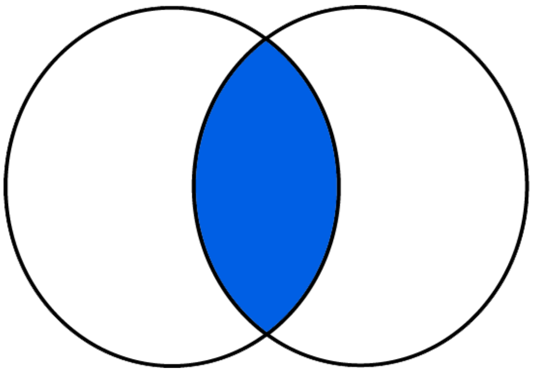


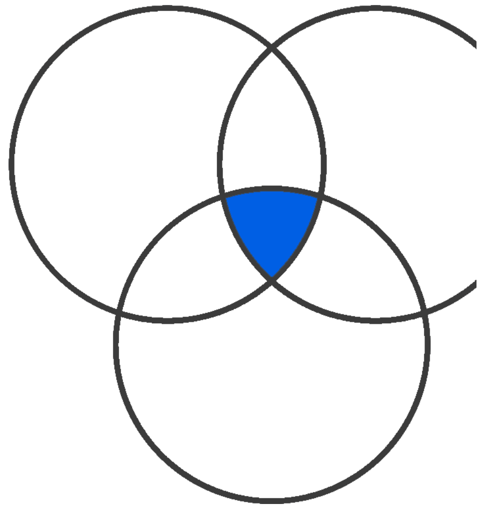
Diagram Your Segments

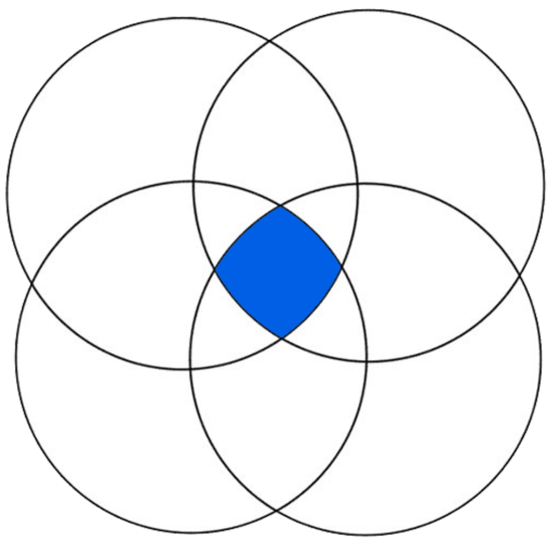
When you properly set up your software, it simplifies the creation of your perfect audience. The Segment Builder will help you find that target.

Remember: segments are a combination of attributes and actions for your contacts.

Now that you got it down, let's diagram the types of audiences you can create.





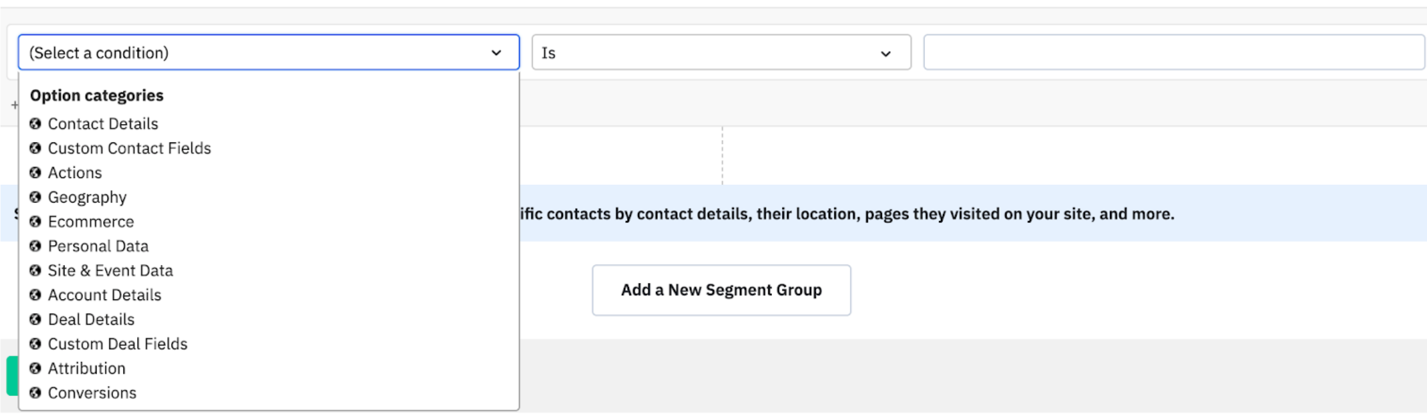


Segment Builder

The segment builder appears throughout the entire ActiveCampaign platform; any time you have to make a decision about your audience, or your process flow, you'll end up working with the Segment Builder.

If you collect data, you can use the Segment Builder to sort your contacts with that data. You can use the **Segment Builder** to create a dynamic, always-updating version of venn diagrams for your perfect audience.

Think of some combinations of Lists, Tags, and Fields for your audience. Write them below, along with the type of message you'd send to that segment.



Based on your plan level and integrations set up, you may see different options in the segment builder!

Contact Management

You want your ActiveCampaign contacts to be as organized as possible.

We recommend using a small number of **lists**, as many **tags** as you need, and the **custom fields** that make sense for your business.

Note:

- A contact is represented by an email address.
- An active contact is subscribed to at least one list.

You can only email active contacts!

Contact Management Overview

- **Lists** are the largest bucket of contacts. They should encompass different communication types or information. Many businesses only use one list, a **Master** or **All Contacts** list.
  - Example lists: Customers, Prospects, Vendors, Board Members
- **Tags** are used to denote interests, engagement, or anything else you may want to act on in the future.
  - Example tags: Engaged, Disengaged, Interested in [Product Type], Member
- **Fields** include the standard Name, Email, Phone Number. **Custom Fields** are pieces of information you'd like to collect for all contacts; they are also used to personalize Forms.
  - Example custom fields: Birthday, Business Address, Policy Number

Lists

Lists are the best way to organize broad groups of contacts.

Common reasons for using multiple lists: Message frequency, supporting different languages, two different companies communicating from one account

Lists should represent fundamental differences in communication

Tags

You can use Tags to denote interests, engagement, behaviors, promotional activity... the sky's the limit! What types of tags are you using right now? What type might you want to use? How are they organized?

Remember: tags are like badges for your contacts!

Tag Name: Recent Activity
Purpose of tag: Tag anyone who's interacted with materials in the last 7 days
(Optional) Tag Group: Engagement Group

Fields & Custom Fields

Custom fields let you personalize your ActiveCampaign Contacts on an individual level. If you need a piece of information that's specific to each contact on your list, a custom field is the way to go.

You can also use custom fields in Forms, and they are particularly useful when asking questions and gauging interests.

Custom Field Types

Text input: A short text field

Text area: A longer text box, good for comments/feedback

Drop-down menu: Create options to select from a list; best used for 10+ choices

Multi-selection list: Select as many options from the list as needed

Radio button: Select one option from a list

Check boxes: Select one-or-many options from a list

Hidden fields: Invisible to contacts, and used to assign information to a contact

Platform Activity: Create Yourself as a Contact

Lists. Tags. Fields and Custom Fields. They all come together on the Contact Record. Jump into your platform, and create (or update!) yourself as a contact in your database.

1. From the ActiveCampaign platform homescreen, click on **Contacts** in the left hand navigation.
2. If you have already added yourself to your ActiveCampaign database, search for yourself in the **Search Contacts** field in the upper right, and open your record.
    a. If you do not exist in your ActiveCampaign database, add yourself:
        i. Click the blue **Add a Contact** button in the upper right.
        ii. Add your **Email**, and **First Name** and **Last Name.**
        iii. Optional: Add a **Phone Number** and **Organization**
        iv. Click the blue **Add** button
        v. A new screen will pop up, and give you the option to add your contact to lists, add a deal, add to automations, and more. **Click Skip to complete creating your contact.**
        vi. After you've completed this step, you'll return to the contact screen. Search for yourself in the **Search Contacts** field in the upper right, and open your record.
3. Take a look at your contact profile. **What information would you need to add about yourself in order to effectively market to you?**
    a. What **lists** would you want to subscribe to, in order to send a message?
    b. **Fields** and **Custom Fields** display on their own line of every contact profile. What Custom Fields deserve a full line on your profile?
        i. Birthday? Interests?
        ii. Think about what form questions could make a good custom field
    c. What tags should you have? Interests? Engagement levels?

Summary

Think about what an ideal contact profile would look like for you. What do you need to know to market most effectively?

Think about the information you need to collect, and work towards building a system that collects that information for you.

Forms

Forms are a great way to collect information about your contacts. How? You ask them for what you need!

Using a combination of Fields and Custom Fields, you can ask your contacts for any important information you'd like to collect, including their interests and preferences.

The key is to create a form that clearly asks for needed information, explains why that information is necessary, and sets expectations about how frequently you'll be reaching out in the future.

Form Best Practices

- Form Actions are one of the first things you should select. What happens when a contact submits your form? You can choose to subscribe contacts to a list, add a tag, and other actions.
- By default, all forms have double opt-in turned on. Double opt-in sends an email confirmation when someone completes your form, asking them to click to confirm their subscription. Before changing this setting, carefully consider the way you're using your form.
- Don't forget to say thank you! Everyone who submits your form will see a default thank you, but you can configure it to redirect to a URL.

Form Use Cases

Forms are great for more than just a newsletter! Use cases include:

- Downloadable resource — Use forms as a gate for a white paper or other free download
- Consultation request
- Software Demo
- Quizzes
- Contact preferences

People using your form are actively engaging with you. Make the most out of the moment!

Planning Your Forms

Forms should fit into your customer experience seamlessly. Use this worksheet to clarify the goals of your existing forms, or forms you'd like to create.

Don't forget — forms are your opportunity to create Custom Fields and ask for input. Are your contacts interested in a particular product line? Do they want to know about live events, or product updates?

Examples

Name of Form: Newsletter Opt-In

Part of customer experience map: Awareness

Location of Form: Banner across the bottom of entire site

Information requested: Full Name, Email Address

Form Action: Subscribe to primary list, add Newsletter tag

Thank You Page: Send to a thank you URL on main site with additional contact information

Double Opt-In?: Yes

Name of Form:

Part of customer experience map:

Location of Form:

Information requested:

Form Action:

Thank You Page:

Double Opt-In?:

Name of Form:

Part of customer experience map:

Location of Form:

Information requested:

Form Action:

Thank You Page:

Double Opt-In?:

Start of Week 2

Campaigns

Campaigns are emails, and they're a vital part of your marketing strategy. Email still boasts the highest Return on Investment (ROI) of any digital marketing channel. Campaigns can be sent from the Campaign section of the platform, or from within Automations. (That's coming up next!)

Campaign Best Practices

Marketing has grown up past the days of sending all of your emails to your entire list. This is where you start using your segmentation power to send the right message to the right people.

There are several types of campaigns that you can send.

- **Standard:** Simple broadcast email, sent immediately or scheduled
- **Automated:** Redirects you to the Automation builder, so you can create an automation
- **Auto Responder:** Sends a message immediately after someone joins your list
- **Split Testing:** Send multiple versions of your campaigns to see which performs best
- **RSS Triggered:** Triggered by an update to your RSS feed
- **Date Based:** Sent based on a date field on your contact's record - for example, a birthday or customer anniversary

After you select the type of campaign you would like to send, you can choose who to send it to (a list and/or segment). Check out the campaign walkthrough for the entire process.

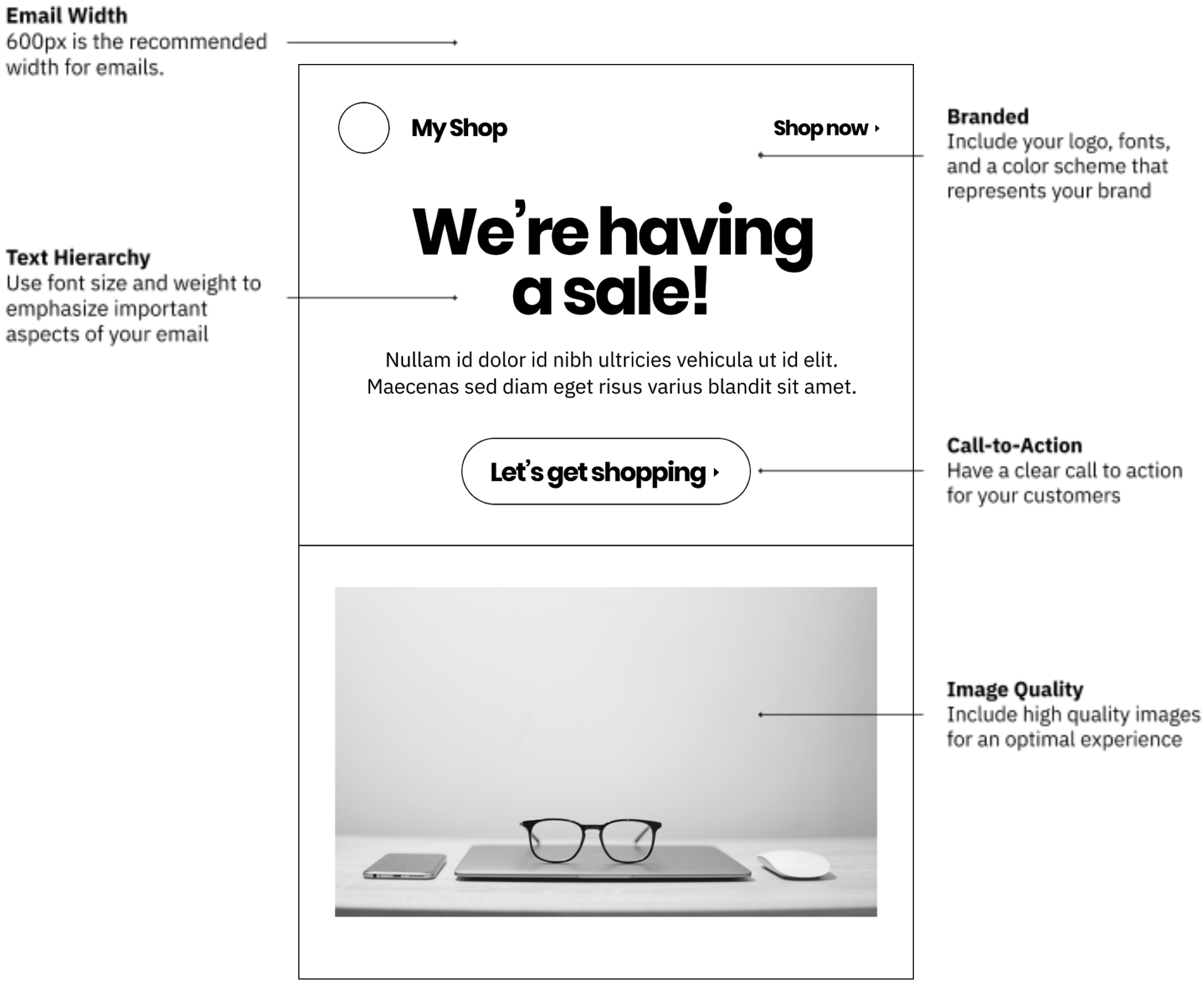
Content Blocks

The Email Designer has several types of drag-and-drop content blocks that you can use to create your emails.

- **Text:** add copy
- **Image:** add images
- **Button:** use buttons to create a prominent call to action (CTA)
- **Video:** link to a video on YouTube or Vimeo
- **Line break:** design element, line between content
- **Spacer:** design element, space between content
- **Social:** add your social media follow pages
- **HTML:** add custom HTML code

Diagram of a Good Email Campaign

We send a lot of emails at ActiveCampaign, and we want to help you send good emails, too. Let's take a look at the anatomy of a good email, and then you can sketch your own.



Split Test Proposal

In marketing, you should always be testing. In email marketing specifically, you should be doing this through split testing. In this sheet you're going to come up with a split test for your business that you can create in campaigns!

1. Pull up your customer experience map homework and pick a place in your map where you will be sending an email with a specific goal in mind. Mark down your email and goal below.

What is the internal name of the email? ____

Ex. - Sign up for free trial email

What is the goal of the email?: ____

Ex. - to get more newsletter prospects to sign up for a trial

2. Identify the most important key performance indicator (primary KPI) for this test.

What's the primary KPI? : ____

Ex. - % of leads that start a trial

How long will you give them to do the goal after the email has been sent? : __________

Ex. - 7 days from the email being sent

3. Please identify your KPIs that you categorize as secondary in importance for this test.

Secondary KPIs: ____

____

Ex. - email open rate, email click-through rate, average days to trial testable aspects of email are limitless! You can test different subject lines, content, calls to action, ect. **<u>The most important element to remember is to only change one variable per email in a split test.</u>** This way you'll know exactly why one change worked over another.

NOTE: Split tests are not limited to two emails per test, you can send out up to five emails with one variable changed in each one.

What element do you want to change? ______________________________________

Ex. - subject line, text block wording, images, featured products, call to action

List what specifically will change about each email below. You need to test at least two emails and can go up to five.

1. ____
2. ____
3. ____
4. ____
5. ____

Ex. - if you are testing different calls to action after a particular purchase, you could suggest a different product across 5 different versions

When are you planning on sending this test? __________________________________

Great work! Now you can go into campaigns and start building this out!

Automations

You made it! Automations!

Automation is the engine that drives your marketing and sales processes within ActiveCampaign, and we can't wait to dig in.

The goal of automations is to create paths, processes, and journeys — both internal and external. Think about your business processes. How can they translate to an automation? Here are some scenarios you may already be thinking about.

- When someone signs up for your newsletter, they enter a drip nurture sequence where you tell them more about your business and the latest news. You will follow up based on what they open and what they click on. You want to stop sending them emails if they aren't opening them, or if they become a customer.
- When someone purchases something from your ecommerce store, you want to send them a thank you and direct them to a site to submit a product review. You will ask them for a review a few times, perhaps with a coupon code for future purchases. If they submit a review, you want to stop asking them for reviews.
- Think outside the email! You want to direct prospects to a Facebook custom audience until they purchase. Also, you want to leverage site messages to collect additional information from contacts with form links, and more.

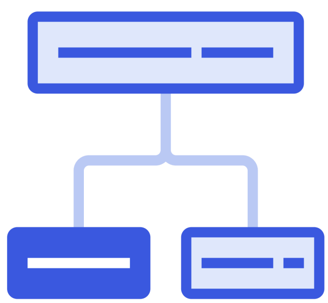
Anatomy of an Automation

Automations are made up of two basic parts:

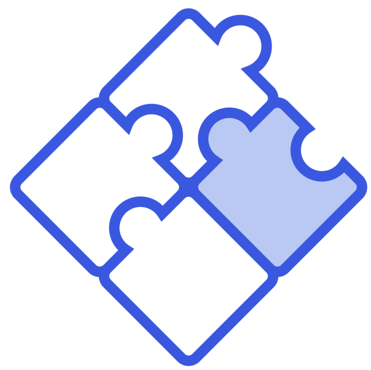
- **Start Triggers:** The "front door" to your automation, start triggers determine the action that starts a contact down a path.
- **Actions:** Actions make up everything else! You can send campaigns to contacts, send internal emails to your team, use conditional statements to create multiple paths based on behaviors such as email opens and link clicks. You can also add wait steps, create Deals in the CRM, and take other actions that help you truly create a personalized journey for every contact that flows through your automations.

Automation Best Practices

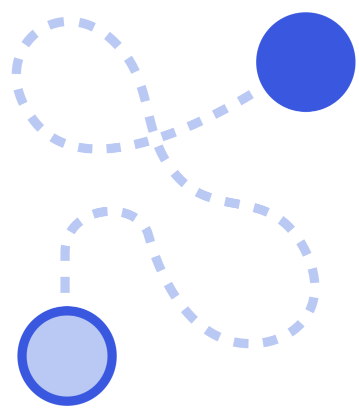
1. Like any good story, every automation path should have a beginning, a middle, and an end.
2. Break your automations up into smaller, more manageable pieces. (Hot tip: you can send contacts to new automations as they complete their current journey!)
3. Automate the repetitive, so you can focus on the impactful.
4. Find the right blend of automation and human touch for your business, to find success with your automation journeys.



Automate Intentionally



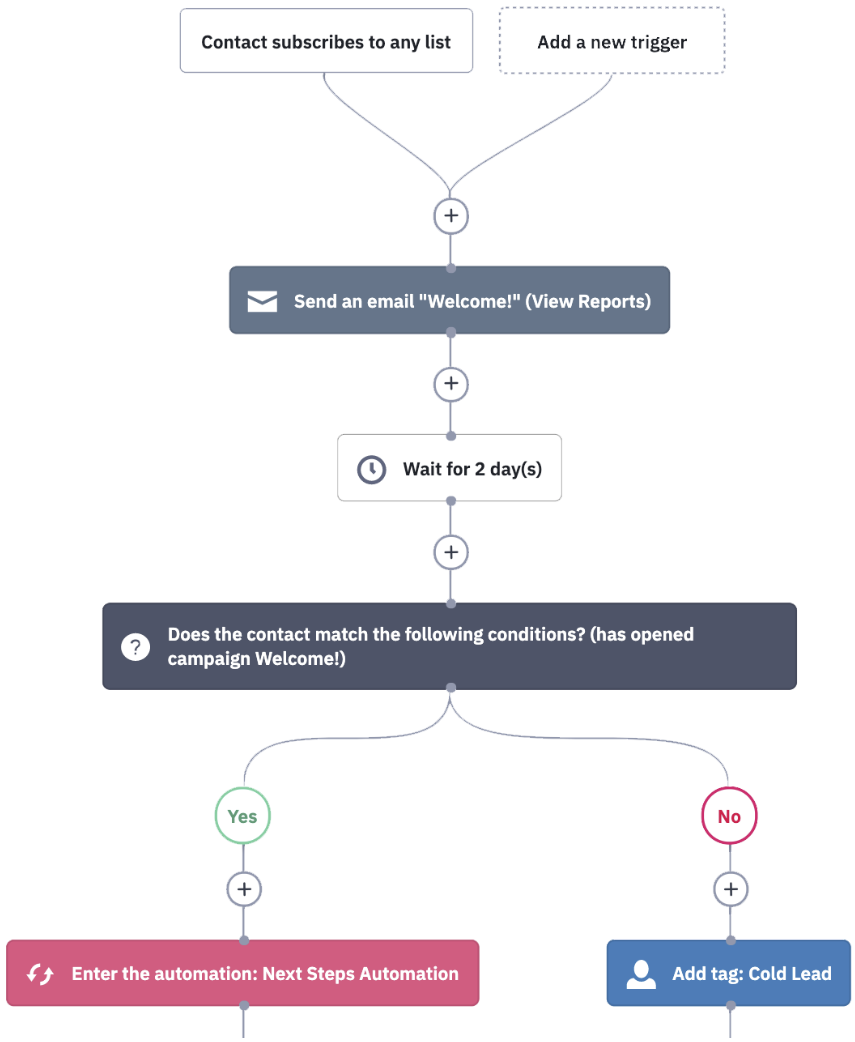
Build Modularly



There are many ways!

Automation Basics

Welcome Series: Send a small welcome series to new contacts as soon as they are added to your list. After a few days, check to see if they opened the welcome email. If so, send them a follow-up message with a little more depth. If not, send them a reworking of the welcome email with a new subject line and slightly different messaging.



CX Automation

Now, let's bring all of this together and really dig into Customer Experience Automation — also known as CX Automation. You want to use automation to market smarter; automation has become the norm in the industry, and it's time to take a different approach.

CX Automation is all about sending the right message, to the right person, at the right time.

The 6 Principles of CX Automation

1. **Every person should get a unique experience.** People are different, and automation should give each person exactly what they need.
2. **Don't start with a blank slate.** Automations should build themselves, so you don't need to build them one at a time.
3. **The perfect experience changes over time.** Automations should update themselves, to save you the work of maintaining complex, powerful automations.
4. **You know your business—you should still be in control.** Your business is yours. Even as automation gets smarter, you still need to be the one who holds the reins.
5. **Ideal experiences change from business to business.** As your business changes, so should your automations, based on the metrics that matter to you—not just generic clicks and opens.
6. **It's not just messaging—it's everything that affects your customers.** Automation controls more than messages—it manages everything (including your own team) that will affect the customer experience.

The Pillars of CX Automation

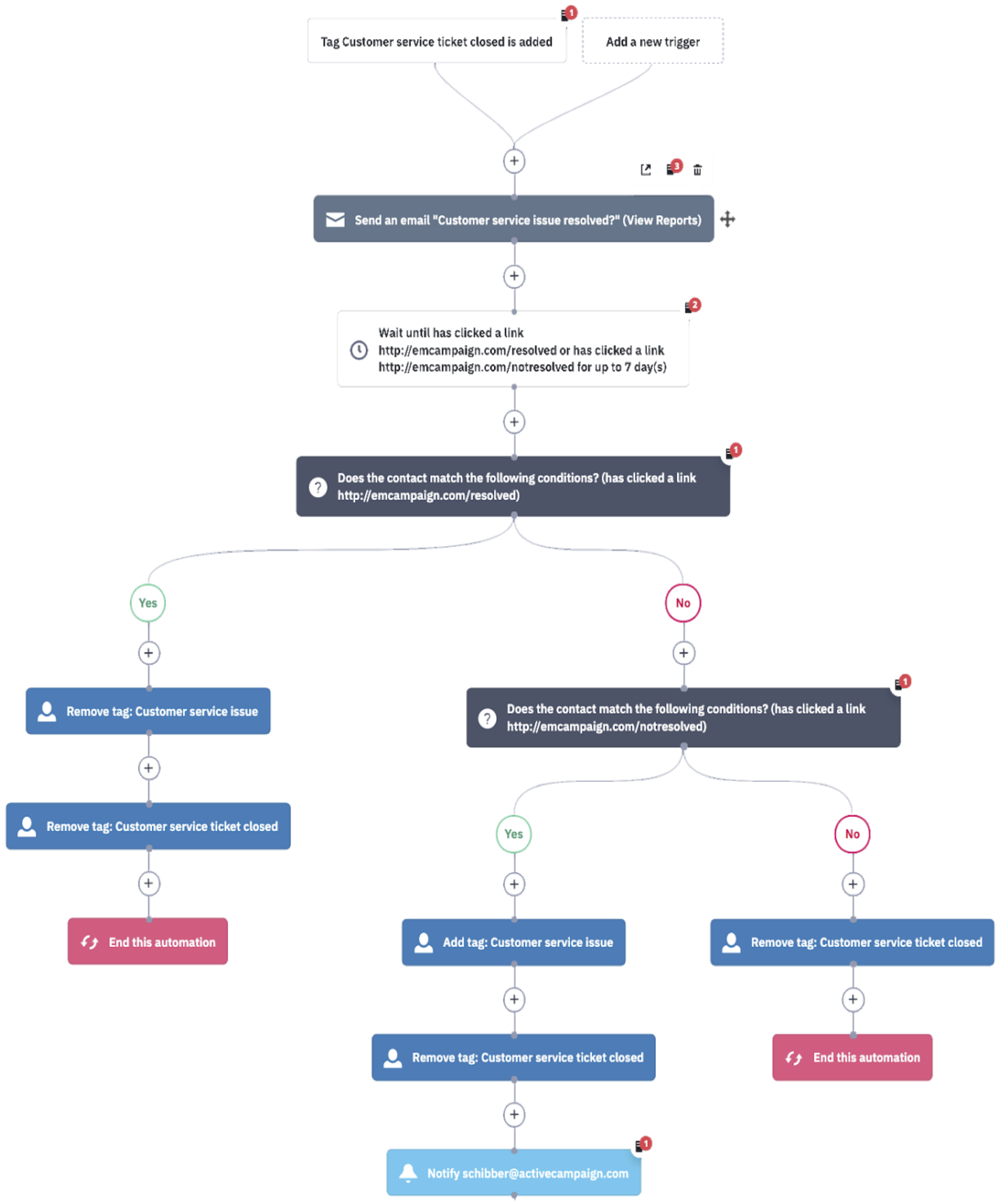
- **CXA Marketing**
- **CXA Support**
- **CXA Operations**
- **CXA Sales** (we'll talk about this one next week!)

CXA Marketing

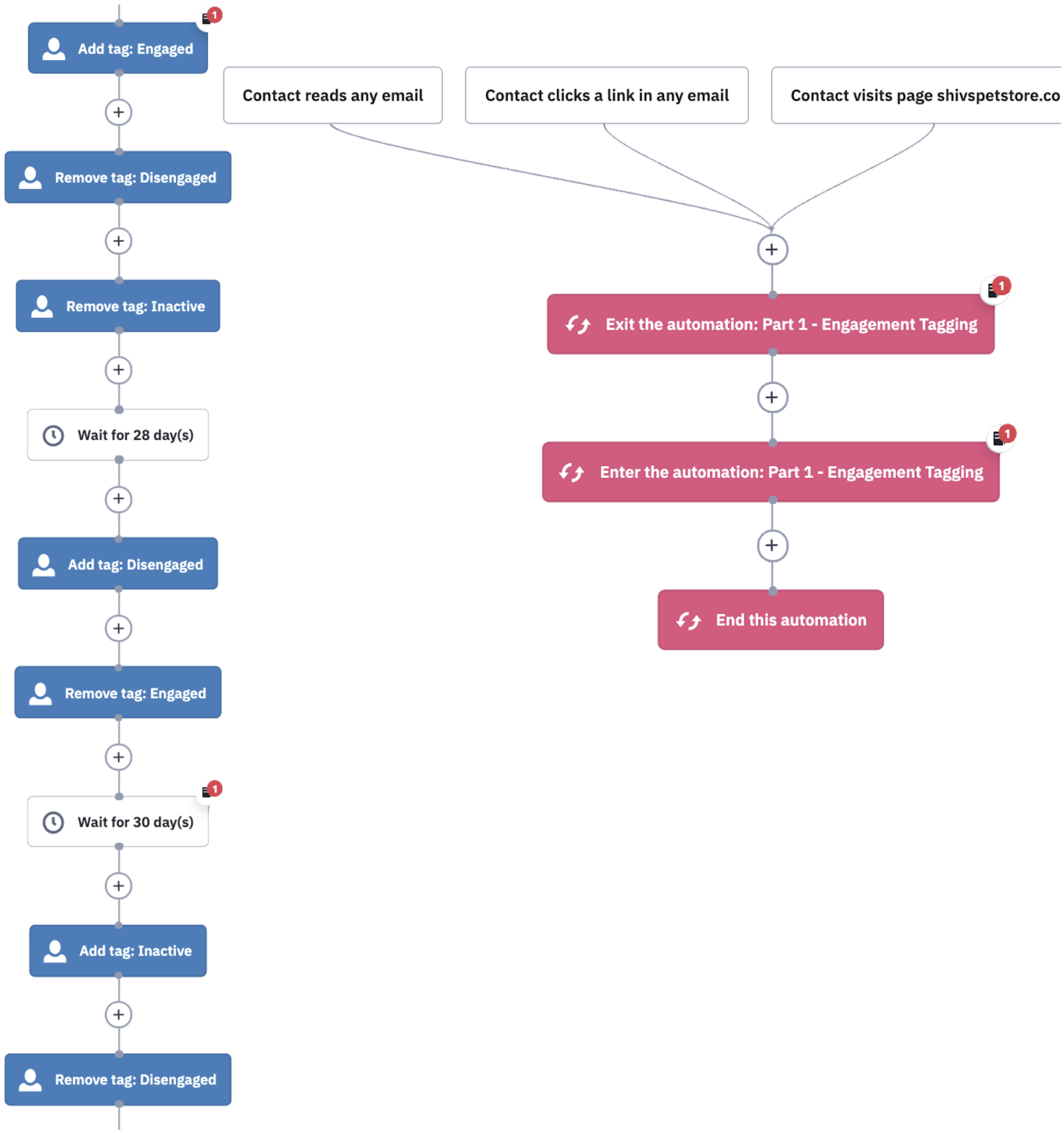
Webinar Reminder Series: Run a lead-in campaign to your upcoming event, as well as a follow-up when the event is done. This is great for letting your contacts know more about the event they are attending and then allows them to leave testimonials and reviews based on their experience. Before importing, build a date based custom field for the event date.

Note before you import! You need a Date-Based Custom Field for this automation.

Customer Service Follow-up: If a contact is given the tag "Customer service follow-up," a follow-up email is sent after one day. If the customer clicks the "not resolved" link, it will tell your support team to reach out to them, and redirect the contact to a form to collect more information. If they click the "resolved" link, it will remove the tag. You could apply the "Customer service follow-up" tag using ActiveCampaign's Conversations tool or by integrating with your help desk app.



Part 1 - Engagement Tagging/Part 2 - Engagement Tagging: Many of your marketing decisions can be made based on the last time your contacts engaged with your marketing materials. You have access to three recipes that will help you track when people engage, reach out to re-engage, and try to save contacts one final time before unsubscribing them to your list.



Integrations

ActiveCampaign is committed to being the powerful marketing & sales automation hub of your business. We believe in a technology stack — you should use the best software tools for your business. To that end, we have an Open API, or Application Programming Interface, which allows our software to talk to your other favorite pieces of software.

While we can't dive into integrating a piece of software that you could connect to ActiveCampaign, we can help you think about what you should be sure to connect to your account. Also, check out our Help Center for helpful articles:

— What are Integrations?
— Getting started with the API

Getting Started with Integrations

Consider all of the tools your company uses, and the types of information each tool stores. Ask yourself the following questions:

— What other tools are you currently using in your business?
— What data do they have that you would like to sync to ActiveCampaign?
— How can you use that data in ActiveCampaign?

Software / Tool	Data	Use data for:
Shopify	Purchase data, total revenue, abandoned carts	Abandoned cart automation, VIP shopper program, etc.

Start of Week 3

Deals CRM

What's a CRM?

A CRM is a Customer Relationship Manager; the ActiveCampaign CRM is named Deals.

A CRM is a tool for:

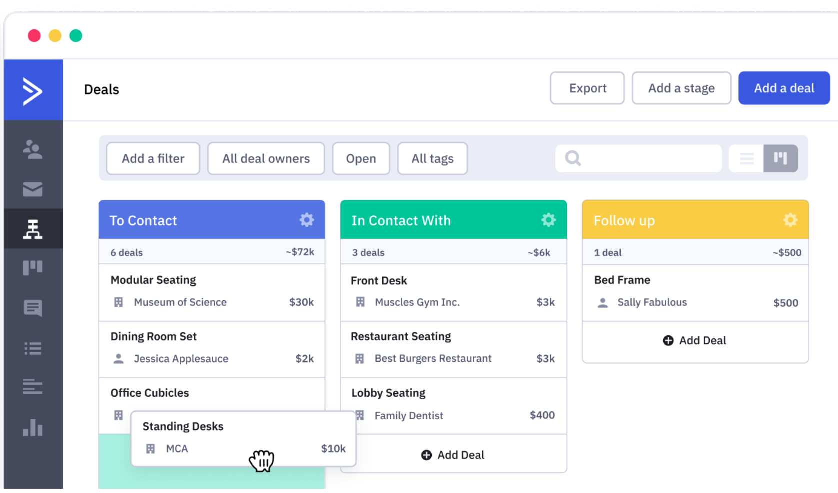
- Helping your teams stay on top of what's next for each lead and customer along every step of their journeys
- Managing interactions with your prospects and customers
- Tracking a prospect/customer's progress through a particular process, or story they qualified for
- Measuring the success of your various team's performance

Note: The Deals CRM is available on the Plus Plan and above.

Sure, you can track sales funnels and opportunities. But, you can also use Deals to create a visualization of any process that has steps. Examples include:

— New customer onboarding
— Internal employee onboarding
— Hiring funnels
— Shipping and order fulfillment
— Any process you'd like to keep track of, that has stages!

The Deals CRM looks like this:



[Learn more about pipelines, stages, deals, and tasks.](#)

Pipelines

A pipeline is a defined set of stages for tracking a process. You may have one sales process for selling ads, one for selling a subscription service, or one for following up with existing customers to try to upsell them. You may also have processes for managing your relationships post-sale that you can track with pipelines.

You can create unlimited pipelines

Stages

Stages represent the steps included in your pipeline. In the Deals CRM, stages are presented in columns and move from left to right. Any deal you create should start in the left column and can be dragged and automated to other columns as it progresses.

Pipelines can have unlimited stages

Deals

A deal in a pipeline contains information pertaining to a potential sale or opportunity—it is where you develop your sales process and get your leads to take action. Deals move from one stage to the next either manually or via automation and can be assigned a particular owner depending on the stage/pipeline.

One contact can have multiple deals

Tasks

A task is a to-do item for your deal. This can include lunch, a call, an email, or a meeting. A deal owner can view their deals by stage or by task due date. You can also export tasks to a deal owner’s calendar in settings.

Create multiple reminders for one task by clicking "Add Reminder"

Scoring

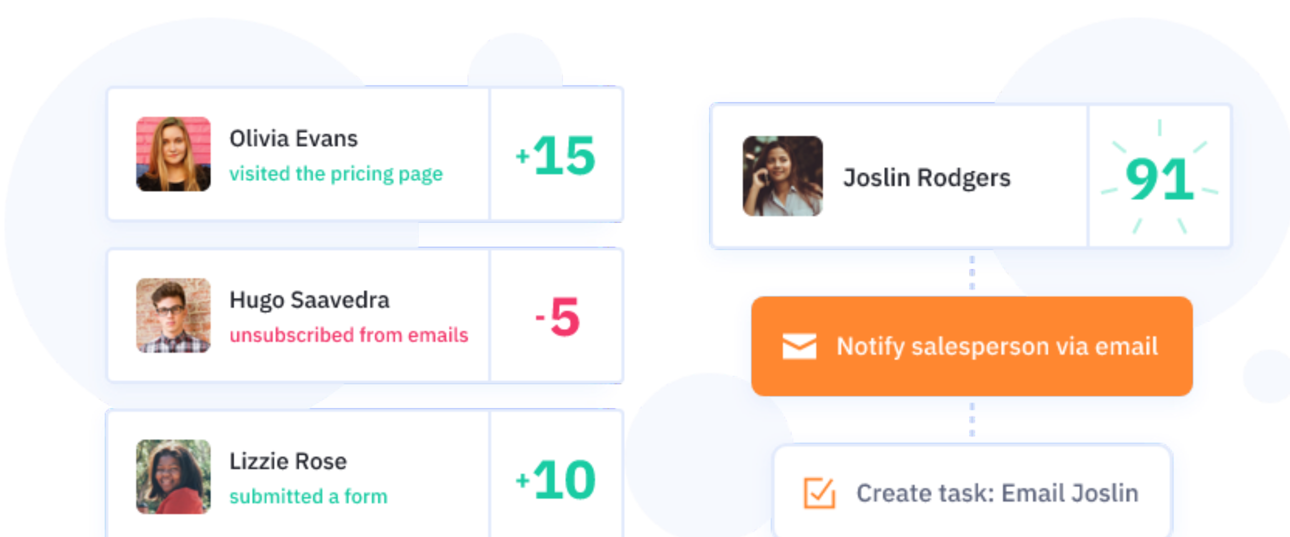
Why is lead scoring valuable?

All leads and customers were not created equally. Oftentimes, you need to get a good gauge on the different thresholds of engagement our contacts have with each other. These thresholds can be created through lead scoring.

What is lead scoring?

Scores, like in any game, only make sense if you have rules and goals; lead scoring is no different. ActiveCampaign's lead scoring capabilities are incredibly flexible, empowering marketers to add and subtract points to their contacts based on actions or inaction. But before you get started assigning points, you have to determine what's most important to you.

The purpose of lead scoring is to track contacts' engagements, creating a temperature gauge by which to plan future messaging and outreach. Think of lead scoring as a gamification of your marketing process. The points don't matter until you create the rules and objectives; you can't win without a plan!



CXA with Deals & Scoring

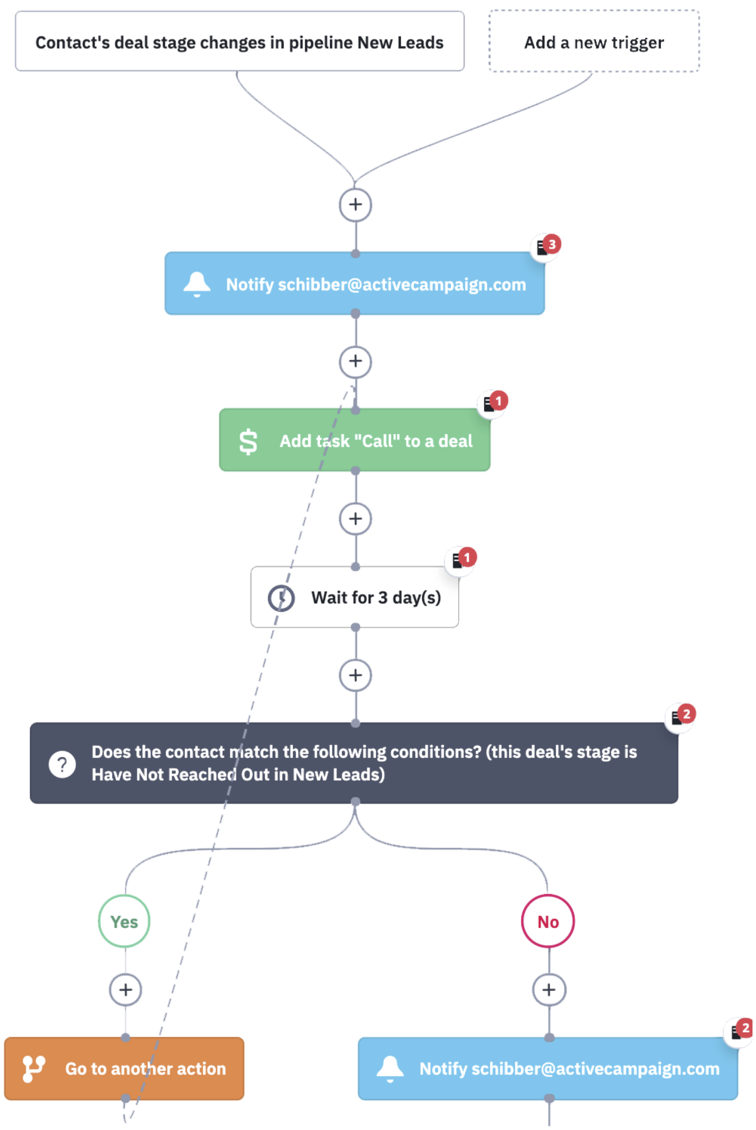
As is the theme across this whole course, Customer Experience Automation applies to everything you do — including the relationships you manage though Deals and scoring. Let's dive into some recipes you might use with these features!

CXA Marketing

Scoring Based Facebook Audience Flow: Move your contacts through different Facebook Custom Audiences based on a score, such as engagement or total purchases. *Before importing, connect your Facebook integration in Settings.*

Travel - Private Tour Booking: This example is designed with travel companies in mind but makes sense for any relationship-based businesses that need to notify a sales representative when a new lead comes in. This workflow sends a message to your team in their inbox and creates a task for them to call in our CRM. If the call doesn't happen in three days, they will be reminded to call via task again.

Before importing, build a stage in your pipeline for contacts for new leads!



Adjust Expected Close Date: Circumstances change and expectations should change accordingly. Adjust your expected close date on a deal when they move between stages using the Math action. Specifically, when they regress in stages, you can add more days. You can take the inverse approach as well by subtracting days based on high engagement. Feel free to make this as general or specific as you want to.

Before importing, build a custom date deal field for "Expected Close Date."

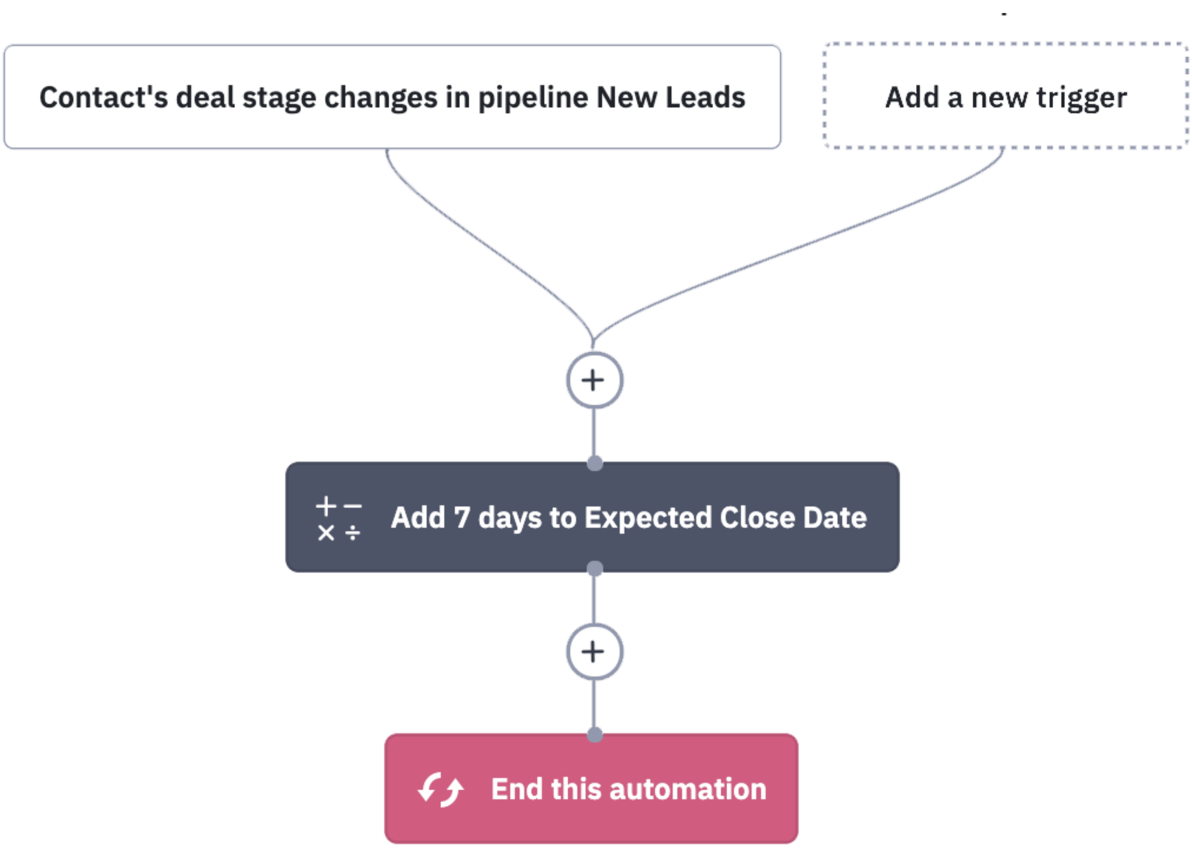


Diagram Your CRM Pipeline

Now that you know the power in the flexibility of the Deals CRM, diagram out a process that make sense for your business

Triggers — *what action must be taken to move from one stage to another?*

→	→	→	→

Stages & Tasks

Stage name	Stage name	Stage name	Stage name	Stage name
Relevant task	Relevant task	Relevant task	Relevant task	Relevant task

What does losing a deal mean for you in this pipeline?

What does an open deal mean for you in this pipeline?

Extra Credit: Is this process part of the Customer Experience Map? Label it!
(Awareness, Consideration, Decision, Growth, Advocacy)

Snap a photo and share your process with us on social! @ActiveCampaign #ACSTUDYHALL

Notes