**Division of Responsibilities for MailerLite and EM\_Sync**

#### **MailerLite Responsibilities**

1. **Groups Management**:
   * Organizes subscribers into **tier-specific groups** (e.g., 2024\_ETB\_NBL\_Opt-In, 2024\_ETB\_NBL\_Silver).
   * Provides automation tools to move subscribers between these groups based on activity and engagement.
2. **Automation Setup**:
   * Executes automated group transitions based on:
     + **Inactivity** (e.g., moving from Opt-In to Silver three days after receiving an ad email).
     + **Time-Based Triggers** (e.g., moving from Silver to Bronze three days after the ad email).
   * Handles movement to the final Wood tier for unresponsive subscribers.
3. **Ad Email and Warm-Up Email Sequences**:
   * Sends **warm-up emails** (three emails to re-engage subscribers at each tier).
   * Sends **ad emails** that aim to convert subscribers into purchasers.
   * Tracks engagement metrics, such as opens and clicks.
4. **Subscriber Data Storage**:
   * Stores core subscriber data (email, name, tier membership, custom fields) for use in campaigns and automations.

#### **EM\_Sync Responsibilities**

1. **Integration with EDD**:
   * Connects to the Easy Digital Downloads (EDD) API to:
     + Fetch sales and purchase data.
     + Match purchase data with subscribers in MailerLite using email addresses.
2. **Creation of Custom Fields in MailerLite**:
   * Ensures the presence of a custom field for purchase tracking (e.g., 2024\_ETB\_NBL\_purchased) for each campaign.
   * If the purchase field does not exist for a subscriber, **EM\_Sync** creates it via the MailerLite API.
3. **Purchase Updates in MailerLite**:
   * Updates the 2024\_ETB\_NBL\_purchased field in MailerLite for subscribers who have purchased an item.
   * Ensures accurate tier placement based on purchase status.
4. **CRM Synchronization**:
   * Updates the CRM with:
     + Subscriber tier information from MailerLite.
     + Purchase data from EDD.
     + Engagement data for reporting and analysis.
5. **Subscriber Management**:
   * Adds new subscribers to the CRM and MailerLite as they are collected (e.g., through lead magnets or manual additions).
   * Syncs subscriber data across MailerLite, EDD, and the CRM.
6. **Tier Transitions Across Campaigns**:
   * Handles movement of subscribers from one campaign to another:
     + For example, subscribers in Gold\_purchased from a prior campaign are added to Gold in the next campaign.
7. **Logging and Debugging**:
   * Maintains logs for all synchronization activities.
   * Provides insights into errors or discrepancies between systems.
8. **Custom CRM Fields**:
   * Tracks subscriber attributes beyond what MailerLite manages, such as:
     + Campaign performance metrics.
     + Source of lead magnet engagement.

**Summary Table: MailerLite vs. EM\_Sync Responsibilities**

| **Responsibility** | **MailerLite** | **EM\_Sync** |
| --- | --- | --- |
| Group Management | Handles all group creation and transitions | Syncs tier membership between systems |
| Automation Setup | Runs automations for inactivity and purchases | Configures CRM and EDD integrations |
| Email Sequences | Sends warm-up and ad emails | N/A |
| Purchase Tracking | Relies on custom field updates | Updates purchase fields from EDD |
| Data Synchronization | N/A | Syncs data across EDD, CRM, MailerLite |
| CRM Integration | N/A | Updates CRM with tier and purchase data |
| Subscriber Additions | Adds subscribers via lead magnets | Ensures CRM and MailerLite alignment |
| Campaign-to-Campaign Movement | N/A | Handles tier transitions across campaigns |

**Additional Considerations for Full Understanding for future updates**

To further enhance understanding of the system:

1. **Detail Automation Logic**:
   * Describe the specific rules in MailerLite for each group transition (e.g., inactivity for three days, lack of purchase).
2. **Field Naming and Standardization**:
   * Provide a standardized naming convention for custom fields in MailerLite and CRM to avoid confusion (e.g., 2024\_ETB\_NBL\_purchased).
3. **Data Flow Visualization**:
   * Share a **data flow diagram** to show how information moves between:
     + Subscribers.
     + MailerLite.
     + EM\_Sync.
     + EDD.
     + CRM.
4. **Error Handling**:
   * Highlight how errors are logged and resolved, especially for critical actions like updating purchase fields.
5. **KPIs and Success Tracking**:
   * Define **key performance indicators** to measure the effectiveness of the system (e.g., conversion rates, tier drop-off points).
6. **Scalability**:
   * Explain how the system will handle growth (e.g., multiple campaigns, larger subscriber bases).