MATT BACAK'S CHECKLIST

Checklist 4: Email Marketing Setup Checklist

Project Name: _____

Date: _____

		Yes	No

Decide on which autoresponder you wish to use in your business.

Tip - We recommend Aweber for those starting out as it integrates with most services and Aweber do not have any issues with affiliate marketing. If you require more automation and/or running a different type of business we recommend Active Campaign.

Create A New List With Aweber

		Yes	No
1	In your Aweber Dashboard click Manage Lists in the top right.	☐	☐
2	Click Create A List	☐	☐
3	Enter your company name	☐	☐
4	Enter your company website	☐	☐
5	Choose your address that should be stored.	☐	☐

Notes

Checklist 4: Email Marketing Setup Checklist

6   Enter the sender name (Your Name or Company Name)   ☐ ☐

7   Enter the sender e-mail   ☐ ☐

8   Click Next Step   ☐ ☐

9   Enter your list name   ☐ ☐

10   Enter your list description   ☐ ☐

11   Click Next Step   ☐ ☐

12   Choose language (leave default unless different than English)   ☐ ☐

13   Subject Line (leave default)   ☐ ☐

14   Message Preview (leave default)   ☐ ☐

Notes

Page 2

Checklist 4: Email Marketing Setup Checklist

15   Click Approve Message & Create List

16   Return to List Options and click Confirmation Message

17   Turn Off Send confirmation for Aweber sign up forms (disables double opt-in via forms)

18   Click Save Settings

19   Click on Help in the top right menu

20   Scroll down and you'll see Live Chat. Open This.

21   Tell Aweber support you would like to turn off double opt-in via API. (This is required when using API connection for lead generation so they do not get a confirmation email after signing up. In general, you don't want this as it slows your list growth.

Create A New Form With Aweber

1   Click on Sign Up Forms in the top submenu.

Notes

Checklist 4: Email Marketing Setup Checklist

2   Click Create Your First Sign Up Form

3   Remove the box "Powered by Aweber Email Marketing"

4   Click Save Your Web Form

5   Click Go To Step 2

6   Enter a name for your form (where you plan to place it for example)

7   Enter the Thank You Page URL (where you want the subscriber to go after signing up)

8   Enter Already Subscribed URL (Majority of the time this is the same as the Thank You Page URL)

9   Click Save Your Form

Notes

Page 4

Checklist 4: Email Marketing Setup Checklist

10   Click Go To Step 3   ☐ ☐

11   Click I Will Install My Form   ☐ ☐

12   Click RAW HTML Version (Use this an not Javascript)   ☐ ☐

13   Copy and paste the code into your webpage/page builder/WordPress theme editor.   ☐ ☐

Adding A Followup Series To Aweber

1   Ensure the list selected is the one you want to work with. You'll see current list in the white box in the top menu.   ☐ ☐

2   Click Messages > Legacy Follow Up Message   ☐ ☐

3   Use the "Drag & Drop Email Builder. Click It once.   ☐ ☐

4   Create your first welcome email (Use the Indoctrination Checklist Included)   ☐ ☐

Notes

Checklist 4: Email Marketing Setup Checklist

5   Once the email is created click save and exit.

6   Click Send Options and Add to Follow Up Series

7   For the remaining emails, repeat this process of creating the email and each time adding to Follow Up Series. You can choose the interval between emails when adding the 2nd email.

Create a new list in Active Campaign

1   In your Active Campaign dashboard click on Lists in the left menu

2   In the top right click Add New List

3   Email Your List Name

4   Enter Your Website URL

5   Enter Your List Description.

Notes

Checklist 4: Email Marketing Setup Checklist

6   Click Create List

7   Once created beside Import Contacts you'll see an arrow. Click this and click Advanced Settings

8   Enter your main email into "Send copies or campaign to, send subscriptions notifications to, send unsubscribe notifications to and click save.

Create a new form in Active Campaign

1   In your Active Campaign Dashboard click Forms

2   Click New Form in the top right

3   Name the form (where you plan to place it for example)

4   Choose inline form

5   Under action leave as Subscribe to List

Notes

Checklist 4: Email Marketing Setup Checklist

6   Under options choose the list you created in the previous step.

7   Click Create.

8   Remove the header "Subscriber for email updates".

9   Remove the subheader asking for a description. (Use your page builder you'll be able to create a better looking headline.

10   Click on Options on the right

11   Under Form Action > Subscribe To List, click the Settings Icon.

12   Turn Opt-in Confirmation to OFF and click save.

13   Click Integrate in the top right.

14   Copy/Paste the Full Embed into your webpage/page builder/WordPress theme editor.

Notes

Page 8

Checklist 4: Email Marketing Setup Checklist

Create a new automation in Active Campaign

1   In your Active Campaign Dashboard click Automations

2   Click New Automation in the top right.

3   Click Start From Scratch and click continue.

4   Click Subscribes to a list and click continue.

5   Choose the list, leave the rest default and click continue.

6   Click Send Email and click Create an email.

7   Enter your email name (welcome email for example)

8   Choose a template or work with.

Notes

Page 9

Checklist 4: Email Marketing Setup Checklist

9   Enter your form name, form email and subject link.   ☐ ☐

10   Create your welcome email. (Use the Indoctrination Checklist Included)   ☐ ☐

11   Click Next and click Finish.   ☐ ☐

12   To add another email, first click + when viewing the automation.   ☐ ☐

13   Click Conditions and Workflow   ☐ ☐

14   Click Wait and choose "For a specified period for time."   ☐ ☐

15   Choose Wait For 1 Day (Change number of days if you wish)   ☐ ☐

16   Click Save.   ☐ ☐

17   To add another email click the + again and Send Email.   ☐ ☐

Notes

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