

Setting up your marketing automation (cheatsheet)

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How to set up your marketing automation in one day or less

We use marketing automation to create contingency plans for our Fragmentation funnel. When users progress through our funnel but exit before scheduling a call with us and completing the survey, marketing automation segments them, tags them and follows up with them via email. Marketing automation automates processes that would usually take humans a lot of time and it dramatically improves your conversion rates and KPI's. This cheatsheet show's you how:

Instructions

1. To complete this process you must have your Fragmentation funnel setup first. If you don't have your Fragmentation funnel setup, go back to week four "Assembling the war machine". That module will show you how to set everything up in detail. If you have it setup, proceed.
2. Create an account with ActiveCampaign if you don't have one already. To do that go to this link: www.consulting.com/activecampaign. You need ActiveCampaign to proceed.
3. From week four "Assembling the war machine" you should have integrated ActiveCampaign with ClickFunnels, created two forms called "Value video optin form" and "Survey application form". You should have created two lists called "Value video optins" and "Survey applications". All of this should be setup and working correctly before proceeding to the next step in this process. If you don't have this setup here's the instructions to do so:

Integrating ActiveCampaign

The next step is to integrate a basic CRM system so that all of the emails and survey applications we collect get stored safely in a system. Out of the box, ClickFunnels won't store any of the survey applications and it can't send emails to people either. This is an issue for us and we need to integrate a basic CRM system into ClickFunnels to solve this.

If you haven't already, create a free trial with ActiveCampaign using [this link here](#).

Once you've created your account watch [this video here](#) to see how to complete this stage of the process.

4. Now that you have all of that setup we can start to build out the automation and contingency plans. Open up your ActiveCampaign account and navigate to the “Automations” tab.
5. On the “Automations” tab, click the “New Automation” button up the top right, click “Import Automation” and then copy/paste the following URLs into the textbox and click “Import”. Start by importing the “Fragmentation funnel automation”. Then import the “Survey application automation”. Once you have both of them imported successfully, proceed to the next step.

Fragmentation funnel automation URL: [http://tplshare.com/2Kr\\$mIf](http://tplshare.com/2Kr$mIf)

Survey application automation URL: <http://tplshare.com/X8TXez4>

Don't worry about setting up the automations, just exit the setup wizard and they will be saved in your ActiveCampaign account. We will be editing these automations later on.

6. Go to ScheduleOnce www.scheduleonce.com and login to your account. Click the “Account” tab at the top of the screen and then scroll down to the bottom right where you will find a box called “Zapier”. Click the “Add” button within the Zapier box to add it to your ScheduleOnce account. Follow the process until it's completed and you have Zapier successfully added to your account. This will be a small additional charge you will have to pay for. It's well worth it so don't worry about that, the money gained from automation more than pays for these additional expenses.
7. Go to Zapier www.consulting.com/zapier and create a free trial account. Click the “Make a Zap” button and then you will be taken to a screen where you can design a custom integration. This part of the process is better explained in a video, you can view detailed instructions showing you how to [set this up here](#).
8. Within ActiveCampaign click the “Automations” tab and then click “Edit” on the automation called “Fragmentation funnel automation”. Go through the setup process and setup the campaign to work for you. This part of the process is better explained in a video, you can view detailed instructions showing you how to [set this up here](#). Make sure you customize the emails, if you leave these as they are your marketing automation will fail miserably.
9. At this stage of the process you should have successfully linked up all of the following platforms: ClickFunnels, ActiveCampaign, ScheduleOnce, Zapier. Now everything should be ready to go and the only thing left to do is test it.

10. The final step in this process is to thoroughly test everything to make sure it's working correctly. This system involves a lot of moving parts and if you're not careful you can mess up the configuration and the automations will not work. This is why testing is extremely important. To test your marketing automation please watch [this video here](#) for instructions.
11. Once you've completed all of the above steps and thoroughly tested your marketing automation setup you're good to go! Congratulations on completing this process, your Fragmentation funnel is now at the forefront of performance/technology and you're well ahead of most consultants in the field today!