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Rainmaker Webinars

Making Integrations, RainMail, and Autoresponders Work for You

Jerod Morris and Chris Garrett

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Jerod: Hello, everybody, and welcome to the latest edition of the RainMaker Site Building Roadmap. We are beginning our series on email marketing with Rainmaker, and today's session is titled Making Integrations, RainMail, and Autoresponders Work for You. I am your host for today's presentation, Jerod Morris, and I will be joined, as I typically am here on the RainMaker Site Building Roadmap, by the great Chris Garrett. Mr. Garrett, how are you doing today?

Chris: I had dental surgery, so I'm a bit loopy on medication. It's wearing off, so it's throbbing. But this is the best time of the week, doing these webinars. I love doing them, especially with you up, Jerod.

Jerod: That's always such a bad answer to the question, "How are you doing?" – to just come in with, "I had dental surgery." That's such a sad answer to that question.

Chris: You only asked for politeness, and then I've made it a downer. Nobody that asks ever actually wants to know how you are, do they? It's like saying, "Hello." Just say hello and walk on, but I always give an answer.

Jerod: No, that's good. But I did want to know how you're doing, and your voice sounds incredibly chipper for someone who just had dental surgery.

Chris: My wife just delivered me a very large coffee from Tim Hortons, and that always cheers me right up.

Jerod: Very nice. Let's do it.

Content marketing strategy (00:01:19)

Jerod: Let's start here. We've been using this graphic on every presentation that we've had. So I figured I would keep it here and give you the floor here to begin and just let us know where today's presentation fits in on the overall content marketing strategy.

Chris: So the part that we often see when we look at people's websites and we look at the approach people are having to their online business, the bit that I am always shocked to see missing ... and I've looked at thousands of websites by doing site critiques. I do site clinics at WordCamp and things like that. And I used to do it as a service. And then when I teach at university, I also do these site critiques. So I've seen lots of websites.

The one thing that really shocks me is when the website makes no effort at all to keep people engaged via email. So you go there. There's no form. There's

no popup. There's no call to action. It's like they're relying entirely on Google and Facebook delivering them people, and then the people being interested enough to go back, to remember to come back. And typically that's not going to happen. Does that happen for you, Jerod? Do you just remember to go back?

Jerod: No.

Chris: Yeah, it doesn't happen for me either. I've got a terrible sieve-like memory as well. Even if it's a place that I really liked, if I've only visited there once or twice, I'm not going to remember. What does get me to come back is an email, an email newsletter, an email with some valuable content in it, or an email with a call to action.

So we really do have a responsibility, if we're building a website for a business, to do this retention piece. We get some sort of attention, whether it's from offline or online. We get people onto your site, onto some content. We encourage them to sign up via email, and then from there, we can keep them interested. They give us permission to contact them in the future, and we take that seriously and responsibly.

So what could be in there? Well, I found that, with giving away a couple of free ebooks, I got really good email conversion, but people were leaving and saying, "Thank you for the free ebooks. I'm going to leave now." And then they

would unsubscribe. So you need to give them some future value, and you need to tell them what they're going to get in the future.

That's autoresponders. So some instant, immediate gratification, something that's going to be useful and valuable for them right now, and then tell them what they're going to get in the future and deliver it via autoresponder. Or even via broadcast, but autoresponder is obviously automated.

In this flow, we've got attraction, retention, and conversion. Yes, you can get some sales straight away, but it's much, much easier if you get people onto a list and you warm them up. You tell them what is going to be valuable to them, how you're going to help them, why you're the person to help them, what proof you have, and then deliver the call to action for the sale.

So get them onto a list. It's cheaper. It's better for relationship building. It's easier for you. It's more automated. You can experiment, and you can optimize all the time.

Jerod: Yup.

Agenda (00:04:57)

Jerod: So with today's session, we want to walk through some of the mechanics of how you do that using Rainmaker. Here's the agenda that we're going to walk through today. We're going to a quick refresher on email

settings. We'll go through that quickly because we covered it in a previous session. We're going to talk about how to integrate your email program with Rainmaker if you're using a third-party email service. We're going to talk about how to set up and use RainMail. And then also how to create autoresponders that do work for you. So that is the agenda.

A quick refresher on Email Settings (00:05:26)

Jerod: Let's hop right in, and let's start with a quick refresher on Email Settings.

With Email Settings, to get there, you click on or roll over the little gear icon. Then click on 'Email,' and that will take you to the Email Settings. And there's a lot of settings here, so if you're going to use RainMail, this little section of settings right up here at the top. This is where you would go to do that.

In this image, RainMail is configured for this site. If RainMail is not configured, you would go here and set it up. There would just be different buttons here to walk you through the process. And then these options down here for managing email lists, Sync Subscribers, and everything down below, those are RainMail-specific. So we're not going to talk about those right this moment, but we will get to them here in just a little bit.

Moving down the Email Settings, you have a section for Email Envelopes Settings. Now, in this section, you'll see there's a From Address, and there is a From Name. What you enter here will be the default envelope settings for RainMail, and you can change those on an individual email basis. We'll show you how to do that here in a little bit.

These envelope settings will also be used for system emails from your Rainmaker site regardless of whether you are using RainMail or not. Receipts, automatically generated emails, when someone gets a product, that kind of thing, those will be sent from Rainmaker, and they will use the email envelope here. So you want to make sure that you set that with a default that you are satisfied with.

That was a very, very quick run through the settings. But I just wanted to make sure that you saw those and are aware of those.

How to integrate your email program with Rainmaker (00:07:04)

Jerod: So let's talk now about how to integrate your email program with Rainmaker. Obviously, Rainmaker has RainMail built into it, but you don't have to use RainMail. As many of you know, you can use MailChimp, AWeber, or a lot of different services. Let's walk through how you do that.

On that same page we were just on, from the Email Settings page, you can connect to MailChimp, to AWeber, to Infusionsoft, as well as ConvertKit and ConstantContact. Those are all there in the email settings right now as of the date we're recording this, which is May 12, 2017. Obviously, more will likely come in the future.

The MailChimp integration, for example, has an option to Enable Single Opt-in because MailChimp offers this option. If you do integrate your site with MailChimp and you want to enable the single opt-in, all you have to do is check that box, and you will have it.

Now, what if you want to use other third-party email services besides the five that I just showed you? Well, there are actually two additional services that are available inside of Rainmaker Labs (GetResponse and MadMimi), with more likely to come in the future.

If you want to use either of those, GetResponse or MadMimi, open up Rainmaker Labs. You need to make sure you that you have Rainmaker Labs activated, but then open up Rainmaker Labs. Then add a checkmark beside the Labs service that you want to enable. Once you do that, once you save Rainmaker Labs with those items checked, then you will be able to configure the settings by going to Settings>Email, which is page that we were just on.

Now, how can you incorporate third-party email services into your opt-in forms? Obviously, if you're going to use a third-party email service, you need

to be able to capture email addresses when people are on your site. Well, of course, you can embed any HTML form that you copy from the third-party email provider into Rainmaker Content Areas or post in pages.

To show you an example of this, right here, this is a MailChimp opt-in form pasted into text widget inside of the Design>Content Areas section. So if you've been inside of MailChimp (they have a little opt-in form designer), it will spit out HTML. So you just copy that HTML right into any place on your site that accepts it – could be a post, could be a page, could be a widget like this – and then that form will now be embedded on your site.

So you can certainly do it that way, but you can also use Rainmaker's built in opt-in widgets and Forms with the third-party email providers that we've shown you are built into Rainmaker. And the way that you would do that, for example, is go to Design>Content Areas. Click on the Opt-in Form widget, and then drag it into a Content Area. And then when you open that up, you'll see that you have a section here for Title, Text To Show Before Form, Text To Show After Form. Then you can actually choose your email provider.

If you have linked up with MailChimp, AWeber, or one of the ones that we talked about, you will see them here for Opt-in Service. So choose your email provider, and then it will pull up all the lists in your account so that you can choose which list you want that opt-in form to go to.

You want to then select the list that this form should subscribe people to and then adjust the rest of your settings. What Thank You page people should go to, whether you want to open the Confirmation page in the same window, the email address input text, the button text, all of that. But obviously, you want to make sure that you get people going to the right list. That's the most important setting there.

Then when people enter their email address using this form, they will be subscribed to your MailChimp list. It's built in right there to work with the opt-in form once you integrate it with your third-party service.

The other way that you can do it is go Content>Forms, and you can actually create a form that will be linked up with your third-party email service. You want to create as simple or as complex an opt-in form as you want. Obviously, if you're getting an email opt-in, the simpler the better.

You should really ask yourself every additional field that you're going to add, "Is this absolutely necessary?" Because for each additional field, you are likely to see a little bit less conversion because you're just adding to some of the friction that is takes for people to register. If it's just a simple email newsletter and there's no reason to have somebody's name, my advice is to just ask for the email and a submit button. Keep it as simple as possible.

So you can create a form like that using Rainmaker's Forms, and then in the Email Marketing tab, again, just as with the opt-in widget that we showed you a few minutes ago, choose your email provider. In this case, this site is linked up with MailChimp, so I can select MailChimp here. Then I can select the list that people who submit this form should be subscribed to. So this site only has one list. You may have 20 lists, and they'll all be listed right here.

So you want to make sure that you choose the right one so that you're linking the form up with correct list.

Finally, then, you can use the Notifications tab to set up any of three different type of notifications – Email, Redirect, or Success Message. A lot of times, I will set up an email notification for myself to let me know when someone has subscribed because I like to go see who it is. Maybe it's someone I know, and I can reach out to them. Or it just gives me a gauge, how many people are signing up and who they are. So I like to do that.

A redirect notification, maybe you want to redirect someone to a Thank You page. That's a very common use after they subscribe. Or a success message, if you just want to keep them on the same page, you can just have a success message that replaces the form and maybe says, "Hey, thank you for subscribing. Check your inbox for the confirmation email."

You can set up any of those notifications, and you can do all of them for a form if you want to. You don't have to pick one or the other. It just depends on the flow that you're trying to walk people through.

Then, finally, if you go back to the main Forms page, you can copy the shortcode that you see right here, and that will allow you to use this Form in any Content Area or post/page. You just paste that shortcode in, and the form will then populate in that content area where you have pasted it. So that's a quick run through of how you set up third-party email integrations and some of the areas where they are built into native Rainmaker features to make it as easy and seamless a process as possible for you to get the most out of Rainmaker with whichever email service that you want to use.

Chris, anything to add to the integration portion of this presentation?

Chris: Yeah. One of the things that you're really going to want to do is that Thank You page. And one of the reasons why is, you can tell your Google Analytics it's a goal that people land on that page. And then your Google Analytics can tell you how well you're doing converting people from visitor into email subscriber. So having that page is a really good thing. And it's one of the key ways you're going to be able to measure how successful you are at doing that retention.

Jerod: For example, you would take that Thank You page and then redirect people there. That means they've subscribed, and then they redirect to that

page. And you want to make that the only way that people can get to that Thank You page so that your stats are accurate?

Chris: Exactly.

Jerod: Okay. Excellent.

Setting up and using RainMail (00:14:35)

Jerod: Let's move on now and talk a little bit about RainMail. RainMail is the built-in email service inside of Rainmaker. Once again, to set up RainMail, you want to go to Settings>Email. Again, if your RainMail is not set up, you'll have a button here to get the entire process started.

But this is also a good opportunity, if you have any questions about how to get set up with RainMail or it's not immediately clear when you go to the settings page, remember that you have the Quick Help button over here. This button in green. If you just type in 'RainMail,' it will bring up some really helpful information, and there's actually a walk through. It's called Set Up RainMail.

It does exactly what it says. It walks you through, literally step by step, all the different steps it takes to set up RainMail. It's not a long, complicated process, but if you have any questions about it, this is a good opportunity to use some of the built-in walk throughs. They'll help take you through the different steps.

Now, you'll see that there's a button here for Manage RainMail Billing. You can enter your credit card here, but do remember that the first 999 subscribers are free. So you won't pay anything up until you get to that one-thousandth subscriber. You do need to enter your information for the billing, but you don't pay anything until you get to that thousandth subscriber. And hey, at that point, you're doing pretty good. So congratulations, and hat tip to you once you hit quadruple digits and subscribers.

Once you have RainMail set up and you have started to create lists, you can click this button right here, Manage Email Lists, to view your different RainMail lists. Here is an image of what that looks like. This is from my site, The Assembly Call, and I've got a lot of different lists – some of which are set up just as tests and didn't really do anything with.

Others I'm currently doing a lot with, like our Free Member Email List, and you can get a quick snapshot of how many different people are on the list at any given time. Each list has its own settings that you can change, so you can click the Edit List button to view the details of any particular RainMail list.

Let's do that now. You can see you get a quick snapshot here of some recent subscribers. You can see some recent mailings that you've sent and those statistics. Then you can actually go in here and edit the individual Settings for that list.

There's a lot of different settings that you can do.

One setting that you may want to add, is that you can use this option to send emails based on an RSS feed. This could be your main site RSS feed, a podcast feed, a category feed. Actually, if you look at this right here, the new 3-Point Shot Email List we have a series of blog posts called 3-Point Shots, and this is actually set up as just as a blog RSS.

People who are subscribed to this, when I publish a new blog post, I don't have to do anything else. It automatically sends an email with that blog post out to folks who are subscribed to that list. So all you would do here is click that little check box, a field pops up and then you would paste in a URL to an RSS feed. That's how that gets sent. That's one of the settings in there.

You can also add your own text to the opt-in confirmation. There's a standard opt-in confirmation that comes, but you may want to personalize it a little bit. Put your site name in there, say something specific to folks who are getting ready to confirm their opt-in. There are very clear instructions here that there's a Required Shortcode and an Optional Shortcode.

The Required Shortcode is the link that people actually need to click. Your opt-in confirmation email isn't going to do its job if you don't include the link. You have to actually include that link, and I think you get an error message if you try and save this email without that link. But as you can see, you just paste that shortcode in, confirm link text, and then you can put anything here.

So it can be, "Click here to confirm your subscription," as is the default, or you can out something totally custom here if you wanted to. You could also add the recipient email as well, just so that people can see, and they can confirm that it is the correct email address. You can put that in there as well as a way to address people, but that allows you to create your custom confirmation email.

Then you also have this series of settings here for what to do after people subscribe and what to do after they unsubscribe. When people subscribe, you could redirect them to a specific page, like a thank you page. That's always a good idea. You can also add them to an autoresponder. For instance, if this is my Free Membership Email List, then I can add them to my free membership autoresponder sequence if I have one ready to go. This would be the place where I would add that.

You can also do something after people unsubscribe. If someone clicks unsubscribe, you could redirect them to a page, maybe thanking them for being a subscriber or reminding them of what they're missing and giving them a last chance to come back and subscribe if you want to. Or once they unsubscribe, maybe they're unsubscribed from a customer list and then you could add them back to a regular informational list, or whatever it might be. You have that option here as well to subscribe them or unsubscribe them from a list right there.

Chris, I know this is a feature that you were really excited about because, obviously, a lot of things you can do here with these options.

Chris: One of the things you're obviously going to want to do is, when somebody joins your newsletter list, for example, you're going to want to put them onto your autoresponder – even if you're just delivering them a free ebook. But then, what happens if they leave the main list and are still getting the autoresponders? When they leave, you want them to do the reverse. If they leave the main list, you want them off the autoresponder. If they leave the autoresponder, you want them off your main list, usually.

Same if it's a customer. If there's a customer onboarding sequence, then really what you want to do is only send that to people who are still customers. So if they refund or cancel, then you're going to want to do the same thing. You're going to want to remove them from both if they cancel or refund.

Jerod: Yup. Okay. So those are the different options in your email list. We go back now to the Email Settings and walk through some more of the RainMail settings there. If you are using an external service to generate email subscribers, then you may want to make use here of the Sync Subscribers button.

Basically, what this will do is it will make sure that you've got every updated subscriber, all the updated information, in your site. That it's up to the minute. And I'll do this a lot of times before I send out a blast, just to make sure that I've got everything updated and up to the second. That's just that button right there for syncing subscribers.

Then, if you continue going down the Email Settings page, you will see these additional settings for RainMail. The first is the design settings here for the template. You can actually choose a Plain Text template if you want to, a Basic template, a Sidebar, or a Custom template as your default. So this is just the default. You can override this when you're ending individual emails. I'll show you that in a second.

This is the default – so the one that you're going to use the most. You can choose it here, and if you add a sidebar, they'll actually be another bar that comes up that allows you to then go in and create your sidebar content.

These settings, as we go on further down, allow you to brand your RainMail Broadcast with an image as well as Alt Text. And the Alt Text here is really important because, remember, when you send emails, some email clients don't automatically show images.

I use Gmail, and I have it set so I have to click a link to accept images in emails when they come in. If there's no image there, it's just a weird, awkward, blank space, but if there's Alt Text at least I know what that image is. It's very helpful to have that in there, so you want to make sure that you have that for your header logo. Then you can also have some Header Text right over there to the right. Maybe a short catch phrase or description. Something like that is always good to put in there.

So here's an example email that I sent from a site that uses RainMail. This is from The Assembly Call, so you'll see how I have to click the link to display images. My header image isn't there, but at least it says "The Assembly Call Logo" right there. The same thing here. That image didn't come up but at least I've got something in there for the Alt Text that's in place of the actual image.

Here's an example of the email with the images displayed. So you'll notice how the logo appears there, the email is clearly branded, looks really nice. Those personalization settings, that's where you set all of that up.

As we continue down our Email Settings page for RainMail, you can edit your Default Sidebar Content, as I told you about before. (If you choose to have a sidebar, this is where you would do that.) And you can also customize your footer. So you can put in your address. You can put in your email address, and put in whatever you want to have there for your footer details. There will be a default there, but then you can edit it to put in whatever you want to have there.

Sending a RainMail Broadcast (00:23:48)

Jerod: So you've got RainMail set up. Now it's time to send a broadcast, which is why you have it. The easiest way to get there is to roll over 'Add New' and click 'Broadcast Email.' That will send you to this page. In the Sender & Recipients tab, you want to put your Sender Name and Sender Email.

Now, again, if you leave this blank, it will use the default that you put in your Envelope Settings, so you can change this. Maybe this email is from Jerod, but next week's email is from Chris. You can change the sender email. You can change the sender name to whatever you want.

Chris: Don't overlook how important this is because I've done tests for how responsive different versions of this can be. I found in my experimentation, you need to test yourself. The more personal and real the sender name and sender email are, the better the results are. I've started doing Chris from Maker Hacks, Chris at MakerHacks.com.

So see yourself, but the more formal it is or the more generic, like Sales@, the more I find that people either ignore them, or they don't even get the emails. Remember, on Gmail, some people have Promotions tab where their inbox doesn't even see that stuff. So you do need to experiment, and I found the more personable it is and more like a real human being it is and the more recognizable it is, the more likely you are to get it opened.

Jerod: So it's interesting that you say that, Chris. I send most of the emails for The Assembly Call out with The Assembly Call as the Sender Name. But then when we're doing one of our donation drives or if I'm requesting people to fill out a survey or help in some kind of way, I'll send it from Jerod Morris. I'll change the Sender Name so that it's a little bit more personal and changes it from just the normal content, like our weekly content that we send out.

So I try to do that a little bit strategically. But I agree with you. Test that out. See what works best with your list, your content. And this gives you the flexibility to do something different with each email.

Chris: Yeah.

Jerod: Next up we go to 'Recipients.' This is where you choose the lists that you want to send it to or if you scroll down here … so this right here is lists. If you scroll down, and I don't have it on the screen shot here, but you'll see tags as well. You can choose the lists and/or the tags that you want to send the email to and then who you want to suppress it from. Like for this one, I'm sending this to our two main lists, our Free Member Lists and then just people who are on the newsletter, and I'm suppressing recurring donors.

This is an actual setup that I had several months back when we did our donation drive because the message that I wanted to send to normal people who were not already recurring donors is different. I wanted to send a very specific message to the people who were already donating and recurring.

I don't want to ask those people to donate again. They already are. I want that email to be much more based around thanking them and reminding them of how much their support means to us. I want to suppress them from the one email, so then I can send them their own specific email. You can do that all right here based on lists or based on tag, whatever works better for you.

On the next tab, for Template, you can choose a template. You can just stick with the default, which you set up in your RainMail settings, or you can pick one of the options here for this individual broadcast only. You can change it to Plain Text, to Basic, or to Sidebar – or even use a Custom template, just for this email. But that's where you can choose that and set that up for this individual email. Then you can add your content.

The nice thing about using RainMail is you create your email content just as you would a post or a page. You can edit it using a Visual Editor, or you can edit it using a Text Editor, whichever way is easier for you to do it. But you just create your content right in here like you normally would.

Just one little advanced tip that I found really helps is, I don't want to have to type out my signature every single time, and a lot of times, once I really get into emailing with a list, I have a certain closing that I want to add. For this one in particular, The Assembly Call is a podcast, so I wanted to add all the links to our show.

Just another reinforcement, "If you want to subscribe to us on YouTube or connect with us on Facebook," so I have all the logos with links to those individual pages. I just have this in a text expander, and I think it's 'acemailclose.' So when I type in 'acemailclose,' this entire thing populates. I just had to create it that one time, and now when type it in, it automatically populates.

I have that as a signature on all of my emails. Just really helps me get that additional branding, that additional promotion in at the bottom of the email without having to do that much extra work.

And then you can go to 'Test & Schedule.' You can preview and test your email here. If you scroll down, you can see a preview of your content, but please listen when I tell you, do not rely just on the preview here. It is nice to have the preview because it will show you maybe a glaring visual error, formatting mistake, or something that you want to go back in and change.

But don't just rely on that. Send yourself a test email. It's really easy to do. You just put an email address in here, hit 'Send Test.' That will allow you to actually view the email in an email client. And obviously, all email clients are different. You're never quite sure how it's going to look in every different email client, but at least if you look at it, if you use Gmail, Outlook, or another popular one, you can be fairly certain that it's going to look okay.

This is an unscientific number. I don't know exactly what the number is. But my guess is about 80 percent of the time, I send myself a test email, and I find at least one thing to change. And it's an important thing. Maybe I'm reading the email in the actual client and I realize that the paragraphs are too big, and I want to make this paragraph that's thick, two paragraphs. Or I don't like how the header looks, so I want to change that. Or this is missing.

There's always something about viewing it in the email client, which is where it will actually be viewed. It's like previewing a blog post on the page not just in the back end. It's always helpful.

Really take advantage of sending yourself test emails, and you can do it really easily right there. Just enter an email address in that field, and test emails automatically add [test] in brackets to the subject line. This just ensures that you're not going to get the test mixed up with the actual email. Let's say I wanted to send it to Chris, send him a test, he's not going to think, "Oh crap. This email already went out." It's going to say test on it, so he's automatically going to know that without you having to do anything extra.

Then, finally, you can schedule your Broadcast right here. Now, here's something that's important. By default, the broadcast is actually set for 12 hours in the future. The reason why this is done is to prevent you from accidentally hitting send and emailing your entire list of 10,000 before you've tested it. That could be easy to do.

You just accidentally click on it. Or you think you're saving it, and it's sent automatically. You don't want to do that. We set that up just as a protection. But if you do want to send an email right away, which sometimes you do, that's fine. Just change the date to a minute in the future, hit 'Schedule Broadcast,' it will go out, and you'll be all set and ready to go.

Chris can remind me if this is not accurate, but I think this was my suggestion. It's really because I wanted to protect myself, just from accidentally sending out emails that I didn't mean to send – which, hey, if you've done a lot of emailing to big lists, you're always looking for safeguards that prevent you from sending an email before it's ready. Just want to make sure that was in place.

Chris: Yeah, I've done that so many times. I've done it wrong. And even when I actually do send it, I always find something I should have fixed.

Jerod: That's just how it goes.

Chris: Yeah, it's part of being human. That's another reason to be more real, authentic, and personable because then people forgive you. If you try to come across too perfect and too corporate, then people don't forgive you quite as much.

Jerod: Yup. That's very true. So that's how you send a broadcast.

Checking your RainMail stats (00:32:28)

Jerod: Now, once your broadcast is out there, you would like to see how people are interacting with it, whether they're opening it up. And so if you want to check the stats on the broadcast that you have sent, go to 'Edit,' and

then click on 'Broadcast Emails.' This will bring up all the emails that you have sent.

You can view some summary statistics just right here. You can see the number of people who have received the email. You can see the Open Rate. You can see the Click Rate, and then you can actually see how many people unsubscribed. I really like having these at-a-glance stats because it just helps me.

These 6-Banner Saturday posts, these are link roundups, so if we don't have a click rate that's at least 10, 11, 12, then we know something probably wasn't very good. Like this one being at six percent, this was not very good, and I actually ended up going in and reviewing that and seeing why we had such a low click rate there.

This one, an alert for the start time, only having a two percent click rate, that's fine because that wasn't really an email that there was anything compelling to click on. This just gives you a nice at-a-glance snapshot view, so then you can dig in if you see something that isn't right.

Well, first you can duplicate an email if you want to send it again. For instance, the next time we have a special start time for an episode, I can just go in and just duplicate this email, then go in and edit the particulars. But I've got the entire shell of the email there and ready to go. If you see an email that has

been really successful, maybe you want to duplicate that so you can use that format again. That option allows you to do that.

Chris: You might want to send it to a different list and suppress the old list as well. One of the things you might do is send two versions of the same email but to two different lists, but you don't want people that are on one to get it twice. That is also a way that you can do a split testing. You can change the subject line, and see which gets the best result.

Jerod: Yeah. That is true. And then if you want to drill into the metrics for any individual emails, scroll over that email, and you can click on 'Metrics.' That will bring up individual metrics, broken out for each individual list that the email was sent to. So this particular email was sent to two lists, and by the way, when you do that, automatically, it's only going to send it to one email address.

If you have an email address that happens to be on each list, it's only going to send it one time. They're not going to get it twice, so you can rest easy there. But you can see the different metrics broken out for each individual list.

You can see how many people it was sent to, how many people opened it, how many of those were unique opens, how many people clicked, how many of those were unique clicks, and then unsubscribes, bounces, complaints, forwards, etcetera. You can see all of that here on this page. You can also review if seeing that is important for you as you review the email.

So that concludes our overview about RainMail. I know that there are probably are a lot of questions. Again, we probably won't be able to get to a lot of those questions in today's session, but certainly we'll be making note of some of the questions that you're putting in the question box and answering as many of them as well can.

Brian's in there, Amelia, in there doing a great job answering questions, but also bring those to the Q&A next week because we want to answer as many as we can.

Creating autoresponders that do work for you (00:35:49)

Jerod: Let's talk about creating autoresponders that do work for you. And that's the beautiful part about autoresponders. You create them once, you set them up, and then they go to work. People subscribe to an email, and the autoresponders start sending and walking people through a sequence of information or a sequence of education. Priming people for whatever your offer is.

The autoresponders are doing the work at the time that people are going to need it, without you having to do it one on one. They really can help you scale what you're doing.

Let's talk about how to set up autoresponders inside of Rainmaker because it's one of the best features of the platform. If you want to set up a new autoresponder, go to 'Add New' and click 'Autoresponder Sequence.' When you do that, you will come to this menu, which allows you to start with a blank sequence. So if you just want to start, no emails in there, you just want to start from scratch, click 'Blank.'

Or you can start with a template – for a Course sequence, for a Sales sequence, or for a Newsletter with Offer. These have actual emails in there with some boilerplate text and some pointers on some things that should be in those emails. If you have never set up an autoresponder before, in addition to researching what we've written about autoresponders over at Copyblogger, using these Autoresponder templates can be really, really helpful in getting you going down the right track from the beginning.

If you click on 'View All' on this screen, so if you click 'View All' right here, that will show you the different sequences that you have. I have a couple of sequences set up at The Assembly Call, and you can actually review the metrics that you have for the autoresponders. Then you can obviously go in and edit that individual autoresponder, change emails, do some of the things that I'm going to show you here in just a second.

When you go and edit an autoresponder sequence, you can really quickly and easily toggle messages Active or Inactive. So maybe I realize that the second

email just isn't doing very well, and I don't want to send it anymore until I get it fixed. And I just want to toggle it. I can just press this button, and it'll go from Active to Inactive real quickly. And you know that it's inactive when it says Inactive and is gray, and you can just click that to toggle it back over to active. That's very easy to do.

You can also click the timing tab and set the specific timing for each Autoresponder message. Currently, it's to send one day after subscription, if I click this here, I have a lot of different options. So I can send it immediately with this checkmark. That means when someone joins the autoresponder, it'll send that message immediately.

Or I can send it based on a delay of a specific number of hours, days, or weeks. Maybe I want to send it one hour later, or maybe I want to send it five days later or six weeks later. Whatever it is, pick the number, pick the timing, and then hit set delay. That's when that email will go out.

You can also specify conditions for when the email is sent, or not sent, based on tags or list status. To do that, it's this button right here. So you see this button that looks like a group of people? When you click on that button, then you will bring up this menu that allows you, again, when it comes to figuring out if this message is going to be sent, you can do it based on whether they're on a specific list or tag. And that will tell the autoresponder whether or not this message is supposed to be sent. It helps you suppress messages from people

who shouldn't get it and make sure that you're sending it to the people who do get it.

Chris: So let's talk about that for a minute. Just in case people don't realize how powerful that could be. In the same autoresponder sequence, you could have two messages that go out at a similar time but has different wording if they're a customer or not. So send one to customers that says, "Thank you for signing up, and I hope you getting value out of X, Y, and Z." And another that says, "Hey, if you haven't signed up, then you need to check this out."

Or it could be it has a tag that shows they expressed interest in something. It could be underwater basket-weaving interest. If they've expressed an interest in it, then you probably want to go more into that, talk about it, and say why it's so important. If they haven't expressed an interest in it, then maybe send them to the landing page all about underwater basket-weaving.

This is where your sequences can be very powerful and orient to what the reader has expressed an interest in or has not yet expressed an interest in. This is how we can more personalize and be less distant from our subscribers because it's based on their wants and needs. It will be able to tune in to what they take an action on.

Jerod: Okay, so let's move on now as we continue talking about autoresponders. You can see metrics as well for your autoresponders. So

the Metrics tab shows you the aggregate metrics for the sequence as well as sends, opens, and clicks on a per-email basis. You can see overall how it's doing, and you can see the individual emails, how they're doing, how many people it was sent to, how many people opened it, how many people clicked etcetera. And of course, how many people unsubscribed.

So if you see there's an inordinate amount of unsubscribes from a particular email, then maybe you want to go in and look at that one because that email maybe isn't doing the heavy lifting that it needs to be doing. So you can make that change. Those metrics help you see that.

The Settings tab gives you a number of customizable settings for each sequence. You can change the default template for the sequence. You can put in a description for the sequence, and then you have all of these different options here. After they confirm their opt-in, you can redirect them to a specific page. After they unsubscribe, you can redirect them somewhere.

Then, very importantly, after the sequence completes, you can subscribe them to a particular list, or you can unsubscribe them from a particular list. And just as you can do with a regular list, you can edit the opt-in confirmation if you want to do that as well. So add a custom opt-in there. All of those settings available for autoresponders just as they are for regular lists.

Strategy tips for your autoresponders (00:42:11)

Jerod: Now, I want to talk real quick just about some strategy when it comes to autoresponders. And a few things that you may want to think about doing – especially with your first email, your first couple of emails – with the autoresponder to make sure that you get the results that you want to get from the autoresponder. And that it's actually doing the work for you that you want it to do.

So first, is to speak in your authentic voice. Just because you're writing an email and you're thinking that it's hopefully going to go out to thousands and thousands of people, you want it to come from your authentic voice. You want to write it to an individual. You want it to seem like it's an email directly from you to that person as if you saw their name come up and you sat down and crafted that email for them. People obviously know that you're not doing that. That's just the feeling that you want, and you want it to have the tone of your site.

I'm just going to walk you through an example of what I do with mine over at The Assembly Call. So our tone at The Assembly Call, what we do is we enthusiastically celebrate the history of Indiana basketball. So right at the top of our first autoresponder message, we actually have an animated GIF of IU legend Isaiah Thomas, who was also a legend with the Detroit Pistons in the NBA of course.

This kicks off our welcome email, and it just reinforces that authentic tone, our voice that we want to have fun with it because it's this funny little GIF. It's just kind of a casual opening to email. You want to have that authentic tone in your autoresponder.

Next, you really want to remind people what they signed up for and then reinforce the value proposition. What are they actually getting now that they're on your email list, and why is that actually valuable? So right after this animated GIF actually, I just give people a quick rundown of everything they get now that they're on the list.

They're going to get the introduction series of emails. They're going to get our postgame analysis write-ups, our news round ups, occasional alerts, and then access to us. We read and reply to all of our emails, and if you're going to reply to emails that people send to you, that's something that's pretty valuable. That's something to remind people of. Of course, if you're not going to reply to emails that get sent to you, then you don't want to do that and set that expectation.

But this really describes what people are going to receive and then helps to reinforce that value. Again, because it's all free. In fact, I could do a little bit more reinforcing of the value here. But you want to remind people of that. Not beat them over the head with it, but just remind people that, "Hey, you're getting all this stuff. You're not paying for it. So this is very valuable content that you're getting here."

So you've got those three elements. Then you also want to provide important instructions. What's necessary for people to know to keep taking the next steps with you? If there are any of those things, you want to provide those instructions to people.

For us, when people get on our main newsletter list, we really want to get people to activate their free membership. So we have that section here that links people over to our free membership to remind them that they can do that. We actually have that in the first autoresponder message, and we have some version of that in every message for the Newsletter Only sequence. We want to get people to the free membership, so we just have to keep reminding and showing them how that is done.

In addition to that, you can do this on a Thank You page. It doesn't necessarily have to go in an autoresponder, but it can. If you want to remind people how to make sure that they get your emails, especially if you've noticed that your emails go into SPAM or Bulk Mail for people, then remind people how they can whitelist your email address or just make sure that they get your emails right in their inbox where they're not going to forget about them, overlook them, or not see them. Those are the important instructions that it's good to use in a welcome email or in your autoresponder somewhere.

Then you really want to show people around your universe. I read this in a book, and I'm blanking on the name of the book where I read this, but it really

changed how I like to set up my autoresponders. But essentially, you want to let people know where they can find you so that they can connect with you where it's most convenient for them.

Let them know all the different options. People can subscribe to us on YouTube. They can subscribe to our podcast in different places. They can connect with us on social media. Let people know that so that they can go where it's easiest for them.

The other thing is, the more that people open and click on your emails, the more trusted your emails are going to become. One of the reasons why I have a lot of links in this opening email – this is one of the things I read in this book, where it talked about showing people around – is the more you get people to open these messages, the more you get people to click on the links that you send, the more trusted your email is.

Because what do people do with emails they don't trust? They hit spam, or they close it really quickly. With emails that people like and trust, they're clicking around, spending time in it. So you want to give people that opportunity with your autoresponder, and it'll help your deliverability over time.

Finally, you want to lead people then into the next email. It's an autoresponder sequence, a sequence of emails, one that leads to the next. You want to help guide people to the next one. So let people know what to expect next, both

so that you can build anticipation and so there's no surprise when you show up in their inbox the next time. Let people know what is coming next.

Speak in your authentic voice. Remind people what they signed up for. Reinforce the value proposition. Provide important instructions. Show people around your universe. And lead into the next email. When you do that, when you set your autoresponder up with some of those things in mind, you'll really be on the right path to having a successful autoresponder.

Chris, I know this is something, obviously, that you have done with great success. What other tips can you give folks for creating autoresponders that work?

Chris: Rather than tips, I've got some mistakes that people make. And you started with the biggest one, it's got to be your authentic voice talking to one person as if it's a private email to one person. That's always going to work better. It's nice when people say, "Hello, everyone," or "Ya'll." But it works a lot better when it's like I'm talking to you or you're talking to me and being a real person.

So I'll say something silly like, "How is it May the 12th already?" It doesn't necessarily have to be anything that's going to be earth shaking, but it just sets you up as a real person speaking to somebody rather than a corporate memo from the 1950s.

That tip about reminding people what they signed up for, the whole idea of you being in their inbox is that they get value out of it. If they can't remember what's in it for them, they'll unsubscribe or they'll hit spam. Do reinforce that value proposition. Give them real value. Don't just convince them there's going to be value, but actually remind them and show them the value they're getting. And give them little wins so that the evidence is their own experience.

Definitely lead into the next email. Tell people what's going to happen in the future. Whether that's a cliffhanger, an open loop, it doesn't matter. You just need to tell people why they should open the next one – and the one after that. Otherwise, again, people will unsubscribe. There's so much competition in the inbox now. It's incredible.

It's more important that they feel like they should open every email than anything else. Because if they don't open it, they're not going to take action on it, and if they don't take action on it, there's no point in having an email. It's a powerful tool if you use it correctly.

And my biggest piece of advice is, in the next seven to 10 days, have a look at the emails you personally opened, the ones that you click on, the ones that you hit spam on, the ones that you unsubscribe from, the ones you wish you had unsubscribed from. Just think about the emails you would miss and the emails that you can't stand to see in your inbox anymore. Just try to model the best behavior. That's the best approach you can take.

Coming up ... (00:50:38)

Chris: Okay. There is a Q&A coming up, so if there's anything we've missed, anything confusing, anything that you'd like to learn about, then please do drop that into the questions for the next session. The link will be coming out via email, so you can fill out the form.

Thank you, everybody, for your questions and for attending. Remember, ask us some questions for the Q&A because, without your questions, we can't tailor it to your needs. So thank you, everybody. Catch you on the next one.