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Rainmaker Webinars

How to Use RainMail to Engage Prospects and Customers

Brian Clark, Chris Garrett, and Jerod Morris

TRANSCRIPT

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Jerod: Alrighty, hey there, everybody. Welcome to today's session. This is Jerod Morris. I'll be hosting today's session. Brian Clark and Chris Garrett are here with me, and we're going to be talking about RainMail. Brian, how are you doing today?

Brian: I'm doing well, how are you?

Jerod: Doing very well. I've been excited about this session for a while, so I'm glad that it's here. A lot of good stuff to talk about today. Chris, how are you?

Chris: I'm doing good. Lots of people from many places. USA. Lots representing Texas and California and Phoenix, Arizona, Oklahoma. There's lots of USA people today. Interesting to see the furthest — oh, we've got John from Calgary representing my hometown. We have Toronto.

Jerod: There's a lot of Texas. We even have Dallas, look at that.

Chris: We've got Switzerland as well. San Antonio. Edmonton, Alberta. Lots of Canadians, so that's good.

Jerod: And the Dominican Republic as well. Yes, Texas is big, that is true. And doesn't Texas like to let you know that it's big? You guys ready to get going?

Chris: Yeah.

Jerod: All right, let's do it. Welcome, everybody, to the first of what will be many of these customer-only Rainmaker Platform educational webinars. Our topic today is the feature of the platform that we are currently getting the most questions about because it's still on the newer side and because the feature set is expanding so quickly, and that is RainMail. So we're dedicating today's session to RainMail and we have more planned for the future as new features get added and as RainMail grows in power and possibility.

We have three main objectives for this session — I guess four main objectives for this session. The first one is to make sure that you understand the basics of how RainMail works and how it integrates with Rainmaker. We're going to go over that real quick.

The second objective is to answer some frequently asked questions, some of the questions that we get the most frequently. We want to make sure that we answer those for all of you in this setting right now. We also want to provide some real-world use cases and examples that you can apply to your own situations. We've got a couple of those that we want to share.

Finally, we're going to take some time at the end to answer some less frequently asked questions too. These are real questions that were submitted by Rainmaker Platform users like you, for this session in particular. What I like about these, and why you should stick around for them, is that they may illuminate ways that you hadn't thought yet to use RainMail and you may find a few ideas that you can apply to your own site when we get to that point.

If we don't address a specific topic that you were hoping we'd get to today, don't worry. Number one, our support team is always standing by ready to help. Also, the Knowledge Base continues to be more robust in its RainMail education content. Like I said, we're planning more of these customer-focused training webinars in the future, so there will be opportunities to cover every element of what RainMail can do so that you can unleash its full power on your sites. Brian, are you ready to roll?

Brian: I am.

Jerod: Chris, ready to roll?

Chris: Yeah, I just need to use the mute button correctly.

Jerod: Let's get to it. Real quick, let me note that we have a lot of ground to cover, a lot of stuff that we want to go over today, so we're not going to really linger on any one slide for too long. But if you do have questions as we go, post them in the question box. Daisy and Brian are on hand to help you out.

If we don't end up getting around to addressing your question during the presentation, just be sure to make note of it and then submit it for the next RainMail webinar and we'll be able to get to it then.

What is RainMail?

Jerod: Let's start with some RainMail basics. Let's go over some of these. The most basic question, "What is RainMail?" RainMail is Rainmaker's built-in, fully-integrated email marketing service. One of the biggest benefits of Rainmaker is that you get your first 999 subscribers included with your RainMail account. That's what RainMail is.

How do I set up RainMail?

Jerod: "How do you set up RainMail?" To set up RainMail it's really simple. Inside of your dashboard, go to "Settings." Click the little gear icon that you see up in your blue nav bar — that's the settings — and then click "Email." That will take you to the page where you can set up your RainMail account. That will take you to this page right here, your email settings.

The page that you're seeing right here, this is from my personal site, The Assembly Call. I'll be using this for some examples today. This is what it looks like when you're already configured. You can see it says, "RainMail is Configured." If you haven't configured RainMail yet then you obviously won't

have that notification, but you'll have a button there to configure RainMail. All that you'll have to do is go in, configure it, and add your billing information.

Again, as I said, you get those first 999 subscribers included. You just need you billing information on file so that if and when you get to that 1,000 subscriber mark — and of course that's the goal, because we all want to build big, robust, growing email lists. That way your billing information is in there. But it won't be used until you get to that 1,000. That's how you get it set up.

On this page here, once you're set up you'll be able to see your email list. There are different options that you have here for managing your list. We're going to go over some of those today. As you scroll down on that page, you have some additional settings. You can choose from three different default templates: a basic, a template with a sidebar, and then a custom template. You also have the ability to upload your header logo so you get your branding on your emails and alt text, as well as header right text if you choose to have it.

Just to give you an example of that how looks, this is an actual email that I sent this morning from The Assembly Call using RainMail, to our subscribers. You can see when you upload your header logo where it goes and where the header right text goes. I do want to make sure that you don't overlook that alt text.

The importance of that is a lot of times in email client's images don't come up by default and you actually have to choose to view the images. What will show up in place of the image is that alt text. You want it to be something descriptive, something that makes sense so people know that the image is there. Of course, if you're using that for branding then obviously having your name in there is a good thing to do.

Chris: That logo is also used on your confirmation emails. This is something a lot of people have asked, "How do I brand my confirmation emails?" Currently you can set that logo there and you can refresh your list if it was an existing list, or any new list will use that logo. What we're working on now is so you can edit the copy of your confirmation email. Look out for that in the release that's coming.

Jerod: Yeah. By the way, if you have any questions here about the templates and design, hold that thought because we're going to get to that. I've got a nice demo for you to show you as we move forward. So that's how you set it up.

How do I send RainMail?

Jerod: Now, how do you send RainMail? How do you actually send messages? In your nav bar the easiest way to do it is just to hover over that "Add New" button and then you'll find two options. You can send a broadcast email that's

a single blast that you want to send out to your list, and you can also set up autoresponder sequences and you can attach those autoresponder sequences to specific lists.

You set those up there in the "Add New" menu. Then, if you want to edit an existing one or, for example, with broadcast emails if you want to see the statistics of a recent message, you can go find your existing broadcast emails and autoresponder sequences using the Edit button. You'll find the links there, quick and easy.

How do I get help with RainMail?

Jerod: How do you get help with RainMail? As questions come up, as you're trying to figure out how to do certain activities or use certain features, how do you get help? Well, the best way to get help is Chris Garrett's direct line. Just call 555-OBIWAN7. Chris, you're going to keep that open 24 hours, correct?

Chris: Err, no.

Jerod: Scratch that idea. But if you want to get help with RainMail, frankly the best way — even better than if you had Chris Garrett's direct line — is if you scroll over the Help menu. There's a number of ways in the backend of RainMail to get help. First would be to toggle the Help Mode on. When you toggle that on you'll see throughout your dashboard green logos. When you

click on those logos they'll give you insight on how to use that particular feature.

Then, of course, the Knowledge Base. You can either click on the Knowledge Base or just search RainMail. If you want to know how to find out about tags, search "RainMail tags."

The Knowledge Base continues to be, as I mentioned before, such a robust resource. Susan and her team are doing such a great job of adding new articles and new lessons and new tutorials all the time.

I'll let you know, as I've gone through and learned RainMail and how to use it, I've really tried as much as possible to use it like you would use it as a user, not just always go to Chris or ask the developers what to do. I've been pleasantly surprised every step of the way that it's been so easy to figure out how to do things just using the tutorials there in the backend of the Knowledge Base. Make sure that you take full advantage of those.

For every feature that we discuss here on this webinar and every use case we show, there are going to be detailed instructions in the Knowledge Base for how to do it. If you see something today and we go too fast or you can't catch it, there are instructions there in the Knowledge Base for how to do it. Of course, if you do have a question or if you need additional help, we're here.

To get help, you can always email support@rainmakerplatform.com. Certain requests they may refer over to our Services team, but they'll triage it there for you in support and either answer it or direct you over to the Services team.

Before we move on to FAQs, Chris, anything else that you want to add there on Rainmaker basics as we try and give folks the general overview of what it is and how it works.

Chris: I think we've got it covered. There's more coming up.

With the addition of RainMail and the LMS, can you give us a sense of the strategic direction in which you're taking the platform?

Jerod: Let's dive in now to some FAQs. As it suggests, these are questions that we get frequently so we want to hit these right off the top here and make sure that you have a good understanding of what the answers to these are.

Let's start right here from the top. "With the addition of RainMail and the LMS, can you give us a sense of the strategic direction in which you're taking the platform? For example, who is your target audience for Rainmaker and what needs do you see them having? Is it bloggers, internet marketers, infopreneurs, small business owners, etc.?"

The basic strategic direction is that the Rainmaker Platform is an all-in-one, integrated digital marketing and sales solution that empowers you to do what you need to do to build an audience, convert customers, and earn higher profits with fewer headaches. That's the basic. Brian, do you want to expound on that in terms of the strategic direction for where the platform's heading?

Brian: Yeah, as we've mentioned all throughout the development process over the years, we're building the thing that we want to use as a sophisticated online marketing company. Jerod, as you and I talk about quite a bit lately, sophisticated and/or advanced is the new normal. We feel that being an integrated solution, Rainmaker — at least in this market — is a better solution than anything else out there. The only other platform that is integrated like this that you may have heard of, of course, is HubSpot, and that's not exactly affordable.

So that's kind of our goal. It really boils down — I know there are some other questions we have coming up that touch on this but — the intersection, the integration of a powerful website builder with email that supports tagging, segmentation, and autoresponders. All of the good stuff that we've got built-in and will continue to refine, and then marketing automation. When you put those three together ... Usually what you do is you have a site, maybe it's on WordPress or whatever, and then you tack on your email service. And we integrate with lots of other email services if you wish to stay there.

Then we have the built-in marketing automation, which is probably the thing you will see get the most more advanced and sophisticated in the next few coming months as we tie it in directly with email.

When you do that, you can create what we've been saying all along is a truly adaptive situation where the site itself can change depending on behavior that happens in email and elsewhere. Mr. Garrett is going to expound on this because he is the marketing technologist. I am going to defer to him to make sure I don't get anything wrong. I'll just say that I get excited listening to him about it because it opens up the possibilities of what I can do. We're going to touch on this a little bit more with some other questions, but that's the general statement.

Who is the target audience for Rainmaker?

Jerod: In terms of the question about the target audience, the target audience for Rainmaker is really anyone who wants to use content marketing to sell services, digital products, and subscriptions. Is there anything Brian, that you would add to that in terms of the audience?

Brian: We talk about this a lot because Copyblogger was one of the original, if not the original content marketing site. We helped popularize it to the $40 plus billion dollar a year industry it is now. The platform is great for general content marketing no matter what you sell. For example, I just did an audio

course for my Unemployable crowd on how to use email marketing to get more and better clients. We used the LMS for that. We used the membership access. We used the marketing automation triggers. All of this stuff is not tied specifically to digital commerce, which is a different type of business. A different type of entrepreneur, I would say.

That said though, I think we need a more precise answer. But there is a good decent split between general content marketers and people who are specifically selling digital products and services. You might think of Rainmaker as more of that digital commerce platform, and if it turns out that that is the audience we're attracting more from, then so be it. But in my mind I would use this even if I had an agency or a service business.

For example, using a free course not only as a lead magnet but as a persuasion vehicle — a content marketing structure that gets people to know you, like you, trust you and hire you as a service professional. I started doing that in 2001. Now, the way I had to do that back then was so primitive, it would be embarrassing compared to what we could do now, and yet it worked.

At that time it was because I was over-delivering compared to my competition, and you still have to do that today. But the cool thing is the technology makes it much easier. You don't have to duct tape everything together. It's much more powerful in the automation and the adaptability.

Most importantly, people are coming to expect outsized value, and online education is something that people will pay money for. That's the definition of good content marketing, basically, giving away something worth paying for to sell something else.

We didn't just make up our marketing strategies because Rainmaker can do it on the content marketing side, it's proven things that we're making a lot easier. Going back, Jerod, to that "advanced is the new normal," we need to get prepared for it because I would say that you'll see in the next couple of years that the prospects out there are going to demand a more personalized experience that works without being creepy or intrusive. That's why we need to start teaching Rainmaker users how to get this stuff done now.

Jerod: Yeah. I think with a couple of the use cases that we have later that's exactly what you'll see. We'll get to that as we go through in this webinar. Seeing lots of questions come in. What's great is we have slides for almost all of these, so stay tuned and there's a good chance that we'll probably answer your question as we continue moving forward with the presentation.

Let's go to the next question. By the way, most of these questions are ones that were submitted via the forum before this webinar. We really appreciate all of you guys contributing and submitting so many great questions.

Is there any easy way to switch from my current email provider and maintain all my segmentations, tags, forms, etc., without having to do it all manually?

Jerod: Here's one we get a lot, "Is there any easy way to switch from my current email provider and maintain all my segmentations, tags, forms, etc., without having to do it all manually? And then, "Will subscribers need to reconfirm?"

The answer to this is contact services@rainmakerplatform.com, because there is a way to switch and to migrate from your current email provider. So you want to contact services@rainmakerplatform.com. They'll be able to let you know the process. I did it when I moved my list from ConvertKit over to RainMail and it was very simple.

Then, the question, "Will subscribers need to reconfirm?" The answer to that is no. What you will need to do is you'll need to confirm to us that these people opted in to you. But you are our customers. You are our people. We trust you. As long as you tell us that these folks confirmed their opt-in to you, we're good with that. We trust you. They won't need to reconfirm again when you import your list.

How does RainMail compare to other email marketing email providers?

Jerod: Moving on to the next question, "How does RainMail compare to other email marketing email providers?" This is a great question. We'll get Brian and Chris's insight on this too, but let me just run down five really simple ways. I call this the RainMail difference. RainMail gives you everything in one dashboard. So instead of having to go elsewhere for your email marketing and doing things in separate places, everything is there in one dashboard, including your email marketing.

In addition to that, as Brian mentioned before, RainMail is an integrated solution. It's email with content, landing pages, membership, marketing automation, and more — all in one in that very same dashboard.

RainMail also allows you to have subscribers and members. You can have those two different classifications and you can give them adaptable, personalized experiences. In addition to that, RainMail allows you to adapt content inside of emails based on tags. So you can send out an email and based on the recipient they may get something a little bit different from the other person, even though that person was involved in that same email. You can actually set it up to adapt based on that person, based on tags and what they've done in the past.

Finally, RainMail is a cost-effective solution that delivers the essential email marketing features that you need, and that's important. It may not have every single possible email marketing feature out there, but it has all the essential ones that you need to do effective email marketing, and we know that because we're using it. That is the lifeblood of our business. If it's something that we absolutely had to have, it would be there in RainMail.

Brian, anything that you want to add here in terms of the RainMail difference and what separates it, what differentiates it?

Brian: Yeah, I think you covered it except for one thing, and this applies to Rainmaker universally. There has been a trend in the years leading up that we kind of rejected philosophically, which is different providers for every different thing — gluing it together and trying to make it look right and play right together.

What you have in that situation is, when something goes wrong — if you can identify where it's coming from — you've got to figure out which of four or five support providers to contact. I think the helpful thing here is because sometimes when you have those duct tape-type integrations, you may have a problem that's manifesting itself in one area but it's really caused by something else, and you're going to get a runaround trying to figure that out because you may contact the wrong people first.

With us, it's just us. Our Support team has been getting a lot of nice complements from Rainmaker customers, but it's a top priority for us. We know we have to provide the best possible support we can. Now, with the addition of the Services department, we're stepping that up a notch, where we're actually doing more hands-on fixes and solutions for you as opposed to just answering questions or fixing a bug or something.

Jerod: Yeah, good call. Thanks for adding that. That's the RainMail difference.

Why Feedblitz for the backend instead of ConvertKit?

Jerod: In terms of how RainMail compares to some other providers, this is a question that we got here: "It seems like ConvertKit is a more powerful service and already integrates with Rainmaker, so what's the advantage of using RainMail over something like ConvertKit?" Related to that, "Why the choice of FeedBlitz as the backend for RainMail versus ConvertKit, because it seems like ConvertKit is way more in alignment with Rainmaker both on functionality and philosophically?" Brian, what insight do you have to provide here?

Brian: To answer the first thing, we just had this dev call and aside from a few "nice to have" things that I've asked Chris Garrett look into that I noticed ConvertKit can do that we don't yet — it does everything ConvertKit does. Now, you've got a different interface, and we're always working to improve that over across the platform, not just in email. I think if you look closely,

there's probably a handful of things that the two services do not have in parity, and I would suspect in the next month or so you'll start to see that list disappear.

It is true, we are aligned with ConvertKit on functionality and philosophy. And here's the interesting thing about your question, because Nathan did approach me about ConvertKit being the Rainmaker solution.

I wanted to, because we like those guys, but there's two problems with that. Number one, it's still an outside SaaS tacked onto another SaaS. It is not the perfectly integrated, all-in-one solution that we're talking about in terms of website adaptability, changing what people view on the site itself, and that's an important thing to us.

Number two, ConvertKit uses a vendor as well, they use Mailgun. If ConvertKit were to be our primary email source, we'd have a vendor on top of a vendor, and that just doesn't work. It's not an easy problem to solve when you're looking at a partnership. That would also drive up the cost of email to you, even though we have an opportunity — since we're selling the entire platform — not to charge you as much for email.

I think if you look at the pricing list compared to MailChimp, AWeber, ConvertKit, InfusionSoft — they're not going to be able to touch us, especially as your list grows. I don't want to emphasize cost, but it doesn't hurt to pay less when you succeed by growing your email list.

Finally, the choice of FeedBlitz. Like with ConvertKit, we have a relationship that effectively provides our email servers. We chose FeedBlitz for a couple of reasons. Even though as with ConvertKit, the power beyond those servers is really in the functionality within the SaaS itself.

We chose FeedBlitz because they have the highest deliverability that we could find. That's because Phil, the founder of FeedBlitz — he's an engineer, he's an old-school C++ guy — his servers are pristine. And deliverability is something that some people don't think about when they sign up for email. You're wowed by functionality or interface or whatever, but if your emails aren't getting through then you're spinning your wheels there.

That was something that was important with our discussions about choosing a vendor for the server-level stuff, that those servers had the highest rating of whitelisting in the email industry. Also that Phil had personal relationships — he can get someone on the phone at Yahoo, and he's done it to fix problems that have popped up. Google, Hotmail, whatever the case may be.

Finally, I think this was probably helpful, given that Phil's engineering expertise in the email level, he worked with us for two years when we needed those servers to be able to provide output by API or otherwise that we couldn't get — he did the work for us. It's a very good relationship. I would caution you equating FeedBlitz with RainMail, because they're very different services with very different target customers, but I'm glad we're on those servers because I know that part is solid and that's what matters.

Chris: If you've been with us for a long time, you'll have seen that we've used almost every email service out there. We haven't just landed on this all of a sudden. It's been a long, arduous process for our own email. We have to send hundreds of thousands of emails and we've been let down time after time. It was a very considered choice. And the fact that we can get the CEO on the phone and he can make a change that day, for us, means that we know we can give you the best.

Can actions and segmenting be triggered by clicked links within an email and when an email is or is not opened?

Jerod: Moving on to the next question here, "Can actions and segmenting be triggered by clicked links within an email and when an email is or is not opened?" And related to that, "Can marketing automation formulas be used for people who are not registered on the site?" The answer to this is not yet, but soon. Chris, I'd like to bring you in here to give us an update or some insight on when these features will be updated.

Chris: Yeah. So we've been working through a roadmap and obviously we've always recommended this logged in experience, but we know that not everybody's going to be logged in. The next phase of marketing automation is that they're going to be able to trigger whether they're logged in or not. Obviously, some things will only happen if somebody registers or is logged

in, that's an event that is isolated to those. But being able to add somebody to the list, take somebody from the list — that's a subscriber action not a member action, so that's going to be expanded to include those.

Also, marketing automation isn't just those formulas. I also regard being able to tag somebody, be able to do a tag and a redirect — those are also kind of marketing automations. Where you put an email out to your list and the subscriber clicks on the link and that's a personalized link for them that gets them to do an action. That's also, for me, marketing automation.

You're going to see a lot more of that soon and I think it's going to be very useful. We've got some practical slides coming up, and Jerod's got some examples of how he's using marketing automation right now. Just imagine that you don't have to be logged in for that experience to happen and you'll see how valuable it will be.

Jerod: I'm so excited to start using these features once they're ready, and we'll share some more examples of this as we go.

Are RainMail lists for different sites built separately? And how are subscribers counted for billing?

Jerod: Next question, "You can see all of your RainMail lists across your different Rainmaker sites that have RainMail activated. Are they billed

separately though?" This is a great question, and the answer to this is no, they are not billed separately. If you have one RainMail account, you can access your RainMail account across different sites.

I have mine activated on The Assembly Call. I could activate that very same RainMail account on Primility and keep separate lists, it's all under one RainMail account, but I'm only billed once. It's an important distinction there to make that you can see it across the different sites but you're only going to be billed once through that one RainMail account.

And then related to this, "If the same subscriber is subscribed to multiple lists within the same site, within the same RainMail account, are they counted as multiple subscribers or one subscriber with regards to billing?"

The answer to this is that the same email address on multiple lists is counted as one total subscriber for billing purposes. I've been on providers before where I've had one person and they were on two lists, and now that counts as two subscribers, it's not like that. You can have one email address on 10 different lists and that person counts as one subscriber when it comes to billing, when it comes toward that 999 subscribers that's included and beyond.

Chris: Unsubcribes are not included. It's only the people you can email. I discovered with another email service provider, that I'm paying for a lot of people who have unsubscribed, so I need to go in there and delete those. With ours, you're only billed if you can actually email them.

Jerod: It's kind of a waste if you're paying and you can't even email.

Is RainMail list-centric or tag-centric?

Brian: Here's an interesting question, guys. It just came in and I think it's good here. The question is, "Is RainMail list-centric like MailChimp or Constant Contact, or tag sequence-centric ConvertKit?" I would say, although you can make as many lists as you want, it is tag and sequence-centric because that's just so much easier to manage when you start getting into different sequences and tags to send people on different paths. Chris, do you want to touch on that?

Chris: Yeah, your subscriber has to be on a list, though.

Brian: Well, of course. You have to get at least one list.

Chris: Yeah, like Jerod also asked, "Well, can't I just email this tag?" No, they have to be on a list and then the tags differentiate those people within that list.

Brian: Well, you couldn't tag them without them being on the list anyway. Unless they were a member, I guess. A member only.

Chris: The main difference is you can't email a tag, you have to email a list and then say, "I want the people who are on this list and also have this tag." But after that it's very tag-centric.

Brian: You can say, "I'm going to email this list, but only this tag." That's the more important thing.

Chris: Yes, or without the people who have this other tag.

Brian: Yeah, that suppression ... Segmentation, suppression, you can do everything. That's why the earlier question — are we philosophically aligned with how ConvertKit does things — yes, and I think they do a good job of it. But you guys can benefit from the integration with the website instead of an outside service in two ways: adaptability and cost.

Jerod: I will just add to that that it is certainly tag-centric, but you can set it up with lists if you're more comfortable that way. I think you'll see when I go through some examples with The Assembly Call. Since I migrated those lists in and they were some legacy lists there and I got comfortable working with it that way, I still use it in that way. To me, when I was on MailChimp I was frustrated by the lack of tagging. When I was on ConvertKit, I was frustrated by the lack of lists. I think with RainMail you can get the best of both worlds and really set it up in a way that works best for you, which is really nice.

Can the opt-in confirmation email be customized?

Jerod: Moving on, "Can the opt-in confirmation email be customized?" Answer to that is that at the present moment no, but this is in the works and it's coming in a future Rainmaker Platform update, right, Chris?

Chris: Yeah. Right now you can — as we said before, you can upload a logo so it's branded according to your site. But right now Dan is working and it's being tested for you to be able to …

Brian: Someone had a question. They were confused about what a confirmation email is. Why don't we back up and make sure everyone understands what we're talking about here. A confirmation email versus a welcome email versus a first email in an autoresponder sequence.

Chris: Okay, the way we do single and double opt-in is the first time somebody enters your account — your entire RainMail account — they have to confirm that they're a real person. They can't just put mickey@disney.com and expect to get all the goodies because they have to click a confirmation. But that's the first time to your account.

If they sign up to your newsletter or to your blog, they click 'confirm', but with any future opt-ins after that they don't have to confirm because they're already in your account as a subscriber once. That is just to confirm that that email address exists and it works. They've typed it in correctly and they really

wanted this. You can't put in Brian Clark's email onto my cat fan list so he gets feline facts because Brian wouldn't confirm that.

Brian: Just to give an example of that, I've had people who have subscribed to Further, my personal email newsletter — it's not really not a commercial project — that they found because of Unemployable. They were concerned that they didn't get a confirmation email because they didn't have to opt-in. They were already a subscriber. So I just have to play with my messaging on that.

To the person who asked this question, you're familiar with signing up for an email list and they said, "Okay, one more step before we send you the goods. Click this link in the email I just sent you." That's a confirmation email. Then the next email that comes would generally be known as a welcome email where you're reiterating what they're getting and what they can expect and maybe a little bit more about you, whatever the case may be.

Jerod: I have a screenshot coming up …

Chris: So when you start talking about lists …

Jerod: I was going to say I have a screenshot coming up, Brian, that shows a way to include that messaging for people who are already subscribed so they don't think, "Where's the confirmation email?" I'll show that in an example that we have coming up.

Chris: That's probably the best place to talk about that then.

How can I use different email designs in RainMail?

Jerod: Moving on to the next one. "Can you go over some design stuff? Right now I have two different needs for my messages. For one list I would like to have regular, old, plain-looking emails. For the other list I'd like to do some fancy-pants stuff like Brian does with Further. Any way to accomplish this, having two different designs."

The answer is yes, and my question back to you is how about three? Let me show you how you can actually do that — have three different designs that you can toggle through using RainMail.

If you go back to your RainMail settings — again, the gear icon to "Email" — that will take you to your RainMail settings. You will see an option to choose a default template. You can choose from just a basic template, you can add a sidebar that will run along with your emails, and you can choose a custom template. What you choose here is what the default will be. When you go to set up a broadcast email, this is what the default template will be, but the nice thing is you're not locked in to just one template. Once you go in — this view that you're seeing right here is from setting up a broadcast email — one of the tabs is for templates.

Let's say that for this email you want to use your normal default template. Great, you go in and you don't even have to do anything because it will have your default there by default. But say your default is the sidebar and instead you just want to go basic, you would choose "Basic." Or maybe you have a custom template that you only use for this one specific newsletter, then for this one you would choose your custom template.

Let me actually — I'm going to go out of the slides and I want to take you into the backend of one of my sites and just show you how this works. I set up a little test email earlier today, a test broadcast email right here so that I can show you this. This is a test of an actual email that I sent out earlier today using RainMail. As I go in here, again, I can choose from these three templates.

Typically I just use a very basic template for my emails, not a lot of fancy stuff going on with it. If I keep it on the default and I look over here and test, I can get a quick view of what this email generally is going to look like — as you see me scrolling there. If I choose "Sidebar," now if I go over here and look — you see that the sidebar popped up. I've got that sidebar saved in there so I can use it anytime I want it.

You'll notice that once the sidebar comes in, now it might do some funky things to your images, so you may want to change the main area. It may change how you have things laid out, but you can see that there. Or, for a custom template — I haven't actually set up a custom template on this site yet,

but I just changed the custom template background just so you could see it work. You can toggle back and forth really easily.

I just want to make a note — and I'll make this note again in the future — it's so important with email to make use of the test email. Because how things look right here, this is going to give you a good approximation, but whenever you're going to send out an email you want to see it inside the email client, on a mobile device — especially if you have images in there. So always send the test emails, especially as you're using different templates, so that you can make sure that you see exactly what it will look like.

Let me take you here to the settings so that you can see where you set up your sidebar and your custom template. Again, if you just choose 'Basic' — you've got that right here. If I choose 'Sidebar', you'll notice that down here a little sidebar section popped up. This is where I've got my sidebar, I can edit it via the visual editor or I can edit it via the text editor.

If I go back to 'Basic' this will go away, because that's not my default. But don't worry, it's still saved in there and you can toggle back to it when you are on 'Edit Broadcast'. Same thing with 'Custom'. If you want to do a totally custom template you can do that here. There are some instructions here that include a couple of tags that you want to make sure that you include. But it's the same thing, if you choose not to use that as your default it won't be there, but it's saved and it will be available for you inside of your broadcast email.

Chris, is there anything else to add there when it comes to design and switching through the different templates that are available?

Chris: I think you covered the main things. What I would encourage you to do though is send test emails to any email recipient that you can, so you can check it Gmail, you can check it in Outlook. Because the fancier you get, the more chance somebody is going to see something weird.

Brian: Let me ask you this, what does the sidebar template look like, say, on an iPhone? Someone just asked that. I have my own custom template, and they're not expensive. It's probably the best option. But let's say someone wants to use the sidebar template, do we know how that views? Is it responsive?

Chris: Rafal worked on them to be as universal as we could get it without going back to 1976. Obviously that is a foundation, and as Brian's done, you can get a really fancy one made for you. But they've built-in best practices — even the example HTML in the custom one. If you took that and modified it, you would have a better foundation than going completely from scratch.

How can I add padding around my RainMail images?

Jerod: We had this question too, "How can I add padding around my RainMail images?" This is really pretty simple. I went in and did a test of this. You just want to add this to your image tag, and you can do it using the HTML editor.

Just add the "style = padding." Let me show you exactly how that works. If you look at the email right here in the visual view, you see this image over here and it's just got normal padding around it. Let's say that you want to add a little bit more padding to it. If you just toggle over to the text editor so you can actually edit the HTML, just paste that little piece of code in right there. You can see, instead of "XX" I have 50.

You're probably not going to want 50 pixels of padding. I'm just doing it for demonstration purposes so you can see it. But the same thing — send yourself a test email so you can actually see how it looks and you can see it pushes the text way out there.

I may say, "Woah, I don't want quite that much padding, let me draw it back to about 10 or 15 so it looks a little bit better." That's how you do it. When you're doing your emails you have that granularity of being able to edit it in a mode similar to how you're creating a post or a page, so it's in a very familiar, reassuring environment there for editing. You can get as granular as editing the HTML too, so that you can do things like that really simply.

Brian: Explain the process for when you want to use a custom template, because someone was asking. Basically, when you want a custom email template you just find a designer, they make you one, and then — is it a self-upload or does Services do that?

Chris: You just paste it in.

Jerod: You would just paste it right here.

Brian: Yeah, of course, okay.

Chris: But Services would be happy to help you with that.

Brian: You get a designer to … You don't have to do it yourself, I can't. But it's also not expensive to create a very simple email template with some CSS that, in my case, exactly matches what a post looks like, and I love that. I'll talk a little bit in the future about what I used to have to do before I switched over to RainMail.

Any chance that we'll be able to assign a RainMail list to the opt-in form widget in the near future?

Jerod: Moving on here to the next question, "Any chance that we'll be able to assign a RainMail list to the opt-in form widget in the near future?"

The answer to this is you can actually already assign a RainMail list to a content area using forms. I know why this question gets asked, because that opt-in form widget is there, so it seems like the simplest option to drag that in and be able to use RainMail. And RainMail doesn't currently work for that, although as Chris will talk about it here in a just a second. Rafal is working on some really

cool forms that you'll be able to use. But don't think that you can't use the widgets or the content areas yet, because you can.

Let me show you real quick how you do that. The first step is just to go in and create a simple form. This is the exact form that I have on my site for people who join my free newsletter, and

it's super simple. There's a little text introduction, a field for their email address, and then a "Join Now" button. Then, if you toggle over to the email marketing settings right here, now you can dictate when someone submits this form which email marketing provider you're using — obviously I'm using RainMail — and then which list you want them to go on. Just by submitting the form, they're going to go on that list.

Then, to add that to a content area, there's a forms widget. Just drag the forms widget over into the sidebar and you can scroll down and you can choose whichever form it's going to be. You can also just put a shortcode in there if you'd rather do it that way. That's a real simple way to utilize content areas for email capture right now.

Chris, did you have any updates on what Rafal is working on with some of those email forms?

Brian: Yeah, what Rafal is working on is a full email form feature. That's going to allow you to even copy the codes so you can paste it into — if you've got

a second website that's not on Rainmaker, you'll be able to have people sign up to your RainMail list from that other site and be able to set all the settings for that. That's what he's working on. It's going to be better than the solutions we've got right now, but the solutions we've got right now do work.

Will people always have to double opt-in?

Jerod: On to the next one, "So it seems like people signing up for a free membership on my site will still have to double opt-in." We talked about this before. "Any chance this will be resolved in the future?"

The answer here is, unlikely. What I would say is remember, as we mentioned, only brand new email addresses must double opt-in. If you have someone who is a subscriber and then they become a member, or say a prospect who becomes a customer, those people won't have to opt in again. It's just, as Chris mentioned, that first time. To make sure it's a real person they're going to need to do that double opt-in.

The thing about this is this is one of the reasons why RainMail deliverability is so high, because of this and because you don't get as much of the riffraff in there. Make sure that your lists are clean. I think that's actually a big benefit.

Brian, anything else that you want to add about this or maybe anything different that you have to say in terms of if this will be "resolved" in the future?

Brian: Well, think about other registration and access concepts — social media, a freemium app, whatever — they all want you to double opt-in. If you don't set it up that way, they get the free stuff without ever providing back the confirmation that this is a real email address. Twitter does it, Facebook does it, LinkedIn does it — every software developer around does it because you want that confirmation.

The alternate way of thinking is, "Well, I'm trying to decrease friction." But what you're really doing is starting off the relationship I think on the wrong foot because you want to bring these cool prospects closer and closer and closer to you, but if you begin with a bad email address you're shooting yourself in the foot. Double opt-in is still the industry standard for very good reasons, and it's for your benefit, not necessarily just theirs.

Jerod: Agreed.

Chris: You just can't look at your raw subscriber numbers and say, "My subscribers went down because I'm forcing double opt-in," because how many of those emails can you actually email? How many of them bounce? How many are making your account look bad in terms of deliverability?

How Brian uses RainMail to do weekly broadcast newsletters

Jerod: This next question says, "I'd really like a step by step outline of how Brian uses RainMail to broadcast his weekly newsletters — Further.net, Unemployable — to his list. Brian, I will step out of the way so that you can provide that.

Brian: Further — again, it's a personal project, I've never tried to make money with it. I don't know if I ever will. I'm using pretty much the bare bones functionality with RainMail. I'm not doing the access and registration thing at this point. I probably will at some point in the future, but the reality of personal projects is they get attention last.

Unemployable is a little different because it's my project but it benefits the company from a commercial standpoint. I'm promoting the platform and Digital Commerce Academy and all sorts of other stuff. There, if you scroll down a little bit, you'll see that I do have a registration concept with a free video course.

That concept will evolve as I start adding more regular premium content. The pitch will basically be, "Register to get instant access to video lessons plus our monthly free webinar," or something like that.

The idea to add a, "No thanks, just send me the newsletter," is something I talked about on a podcast episode with Joanna Wiebe. I took a strategy that

she likes to use which is make them choose yes or no as a psychological thing. When you push that "No Thanks" button, you're actually losing something.

In this experiment, I wanted to position the newsletter as "Of course you want this, but do you also want this? I'll have to ask you for just one extra — you'll have to create a password and tell me your first name." Overwhelmingly — 5:1 maybe more — people choose the registration concept.

I haven't split tested it yet against just registration. I'll get around to doing that. I'm about to start doing a lot of stuff on Unemployable, because I do have a membership concept and I do have a multiple persona audience.

Some people will identify as freelancers, some people identify as coaches, consultants, entrepreneurs, small business owners — all of those self-identifying ways of thinking can allow me to create and adapt a content experience with the newsletter. A certain type of person won't want freelancer articles because they have a start-up. You get the general drift of it. That's the stuff I'm going to be implementing now that I'm over on RainMail. I can start using the surveys and quizzes to get people to self-identify, start using tags.

Just to explain, I sent a link for those who were lost on this, but a tag is like a category of a blog post. You have a piece of content about email marketing and you have a whole bunch of different categories because you talk about online marketing all the time. You're going to tag this one — let's say, "How to Build Your Email List: Traffic Strategies for Building Your Email List Faster."

You tag "email marketing," "landing pages," maybe "SEO," maybe "social media marketing." The post is about all those things, even though the core topic is email. Tags are the same way, except with all sorts of demographic, geographic, and psychographic information that you can determine from you audience.

You can tag them just like a blog post by what are they interested in. Where did they enter this site? What did they sign up for? You can tag them as being interested in that. You can do quizzes and surveys where you ask them to give a little bit more information after you've earned some trust. Each of those is a tag. It's a CRM concept, really and that's why Mr. Garrett will tell you about how we're working towards having true functional customer relationship management capabilities in Rainmaker. That's really where email's going next, and that's more the realm of a HubSpot or InfusionSoft. Yet, again, we're going to be able to keep this much more affordable, certainly, then you would be paying those companies.

So that's an overview strategically. The great thing I love about RainMail is — I was on a AWeber before with my list, and like I said, from a design standpoint, I wanted the email to look just like the post. I had a custom template over at AWeber for each publication. I always create the post first and then I basically have to take that code of the post itself — the text version, not the visual portion — and copy and paste into AWeber content interface. Then I'd spend a good 10 minutes cleaning up the crap. It just didn't translate cleanly. The

spacings were all off. There were strange characters. I don't think someone like MailChimp has these problems. They've always been really good on their templates and design and whatnot. But that was my experience with AWeber.

Now, when I do the same exact process it comes out exactly the same on the first try. All I do from the post to the email is I add an <h2> version of the headline above the image so that it's in the subject line and, again, is in the template. I add, "Read on Unemployable.com" centered beneath the image. Some people prefer that, number one. Number two, if I do have some sort of email rendering problems — I'm not aware of any since I switched to RainMail. With AWeber and Yahoo subscribers, it was always a miss. It never came out right. It's a best practice to provide a direct quick link to the web version, which you know at least is controlled across browsers and all that kind of thing.

I hope that answers the question. Further is pretty straightforward, but Unemployable is really my playground for seeing what I can squeeze out of Rainmaker, much like Jerod is doing with his sites.

How do I send only some of my posts to people on my list?

Jerod: In a related question to this, someone asked, "Imagine the scenario where Brian published additional posts on Further.net during the week but

only wanted his list to get the regular once a week post — i.e. not all the posts in his RSS feed — is this possible?"

The answer to this is yes. Let me show you real quick how to do this in the backend. I'm going to show you, again, an example from one of my sites. On The Assembly Call we send out a weekly deal on IU gear. It's an affiliate strategy, part of the way that we earn revenue to the site. Let's say that I want to send this out via blog RSS. I would go into my email list and click this button right here for "Edit List." When I do that it will bring up the list options. You'll notice here, if you click the check mark and turn on "RSS Feed" for this list, this field will pop up.

What I've done here is I've put the category feed. It's not my main feed, AssemblyCall.com/feed, it's the category feed. What this means now is that when there are posts that come out with that category, they will then be sent to this list. That way, people who are subscribed to this list will only get those posts, they won't get everything that is put out there.

Brian could do the very same thing with Further. If he wants to send those out via RSS, just have maybe Further.net/newsletter/feed and make sure that those are categorized as newsletter. Then he would be able to send out just those but not everything else on his site via email. It's a great question and a common use case.

Use Cases and Examples

Jerod: That brings us to use cases and examples. One of the questions that we got often is, "Can you cover some basic use cases?"

I know, looking in the questions, we have some people asking about those. It would obviously be impossible for us to cover all of them, but both Chris and I have put together some basic use cases that we're using on our sites. Hopefully they'll give you an overview of some of the different ways that RainMail integrates with other Rainmaker functions and jog your mind, your ideas for things that you can do. Chris, we're going to do your use case first. I will hand it over to you to walk us through this and then we're going to go through the screenshots. How you are actually implementing this?

Chris' use case

Chris: We're talking in this particular example about my hobby blog, which is MakerHacks.com. It's something I get to in a flurry of activity and then it goes quiet for weeks and months. Not everything I want to go out to my email, and that's been a problem in the past. Also, even though Brian's approach of handcrafting his newsletter is the best way, I know that I'm not going to do that. They need to go out automatically even if they don't look as good.

I set up a tag and that is going to be just the stuff that has to go into the email. At the same I'm setting up a sign-up incentive, which is a free membership, a "How to Build a Robot" course. Again, I didn't want to do double the work. I didn't want to be having lots of sequences and lots of emails because I knew I wouldn't do that work. I need somehow to maintain both at the same time, so I'm tagging members.

When somebody signs up as a member, I set them as a tag so I can treat those differently on my list, which means the autoresponder criteria can say, "Don't send this to members. Do send this to members." I can incentivize people who are just on the list to get into the membership. And the ones that are on the membership, I can incentivize them to engage with it, which means that I can also use the marketing automation to then send a special sequence just for the people who engage with the robot course. That sounds very complicated, but it's doable.

The last thing I wanted to do is I want to see — there's many topics that I'm going to cover, from 3D printing to electronics (Raspberry Pi/Arduino). All these things that are just terribly geeky. I want to see what people are really interested in.

I had this popular 3D printing quiz. I want to see which of my members, which of my subscribers are actually engaging with that, so I put a tag on that blog post. Anytime somebody has the subscriber cookie or is a member and they go to that, they're going to get tagged to say they're on the quiz. I can

send an email suppressing quiz people to send people to it, and I can also send an email to the people who did engage with it to say, "Okay, what were your results? Was there anything you were confused about? Did you get any questions wrong, or was it too easy for you?" Then I can see if this is something they're going to be interested in.

Jerod: There's the objectives, now let's walk through how you're actually doing it.

Chris: When you do a tag and you click on that tag in your blog post — you can see an example that I did last night just for this. If you see the "tagged with" on the blog post, I just created a new blog tag called "newsletter." If you click on that, it'll send you to all those post that are tagged with that tag.

You put "feed" at the end and you have a special RSS feed. RSS is just a way of syndicating that content, which, if we continue, we can see that is the feed that I can paste into that box. The default is everything. Everything I publish on here I want to go to this blog broadcast. But I don't want that, I just want anything tagged with "newsletter."

That can all be categorized as "normal." But just like sometimes you tag something as "featured" or "important," I can tag this as "newsletter" so that only these posts go out to the email. Which means that in between those ones that are solid, meaty content, I can just do the tiny posts, which might just be a photograph of a new gadget that just arrived or it might be me musing about

something. I don't want it to go out to the email, they're just in between posts, just me thinking about something. I only want the stuff to go out to the email that people are going to respond to and really enjoy.

As you can see at the bottom, when people sign up and they join this list, I also add them to my autoresponder, which right now is just a welcome. As I mentioned before, I can suppress and include messages based on their tags, so I can encourage them to join the robot course or to take part in the robot course that they already joined.

So, I've not got two sign up boxes on my site. They sign up to the email — everybody gets that — and then after they join the email I encourage them to join the membership. Or through advertising I can send them straight to the membership, knowing that they're still going to get all the emails and they're going to get encouraged to participate.

That's what an RSS email looks like. It's got my logo and it's just the snippet of the top of the article, very basic. Is not as nice as Brian's, but it's automatic. That's my generic autoresponder that just says, "Welcome and go ahead, click through to get started with the robot stuff and this is what to expect." In the autoresponder — I always encourage everybody to have a welcome email, but what I'm doing is when they've registered for the free membership I'm saying that they're a member. I'm just tagging them as a member right now, not tagging them to say they're interested in the robots or anything as granular. Just saying they're a member, "yes."

I can broadcast and I can put in the autoresponders specifically to those people. I set this "Registration Successful!" as the thank you page. When they sign up to my free product, my free membership, they get taken to registration successful, and that's where that tag is.

Brian: Before we go forward, I wanted to touch on something that had come up in a few questions and I meant to cover during my part, about list migration. My list was migrated from AWeber. We've had other people migrate from just about anyone else you can imagine, including InfusionSoft now, which is probably the most complicated but definitely doable. We don't just have an upload interface for your list, you do have to contact Support, or Services really, to do it for you.

Someone, I forget who, said they didn't have a week or two to wait for that to happen. Do we know what the turnaround is to get that done? I know mine was in a day, but then again, I'm the CEO.

Jerod: Daisy might be the best to provide some insight there.

Brian: Daisy, what is reasonable to expect for migration of the email list?

Daisy: We're working for within three business days right now. Usually it's faster than that.

Brian: You want to just set up your process. I'm trying to figure out what we did first. Remember, when you're moving a list over, you're not really losing anything until you shut down your account and delete your list at the old place.

I think what I did was I sent my list to Daisy first and then I waited for her to get it done. Then I changed the forms on the website to switch over to the RainMail list away from AWeber. Then I sent over a supplemental list of the people who had subscribed through the AWeber form in the last several days after I changed the forms. That means I lost no one. You just keep the backup list, if you're paranoid, for a week or so to make sure everything is fine. But in that process, you can do all the steps that have to happen to completely move over and not really lose any downtime.

Jerod: We have a slide actually that will cover this a little bit later. Chris, correct me if I'm wrong, but in the future that will be built into the dashboard — being able to import. Right now, it goes through Services, but that will be built into the dashboard in the future, in a future release.

Chris: Nothing's been set right now, but we've been talking about having an option if you don't buy into confirmation email now having the import capability. What we'd never want to do is allow somebody to just pick up some business cards at an event and then put them into the system onto a list without any confirmation going out and risk getting marked as spammers.

Even though they're registering for a free membership, I'm putting them onto the MakerHacks blog list, the same one that is just 'sign up for the blog'. Ordinarily, that would seem a bit clumsy, but because it can include and suppress, I'm going to be okay with it.

That's the vision right now, but I might come back to you and say, "Hey, I made a mistake." So far that's my vision for it. This is in the autoresponder, how we can see who they are before we send them an email. On the left I've got the example subscriber, which is me.

My example subscriber I have tagged as member: "member = yes" over on the right-hand side in the autoresponder criteria. That one message — not the entire sequence, just that "Ready to build a robot?" message — I can say, "Are they tagged as 'member'?" If they're already tagged as "member," I can send one message. If they're not tagged as "member," I can send a different message. I want to send people who aren't registered to go ahead and register and the people who are registered, I want them to take part.

This is my blog post with the quiz. I just went back and added "tag member," "tag this quiz," "value = yes." I just want to know about the two parts in the quiz. Then, as you can see on the right-hand side, my example subscriber again says "quiz = yes."

Then I can send a broadcast and say, "Hey, I saw that you joined the quiz, what do you think about it? The people who didn't, I can say, "Did you check out the quiz yet? How well did you do?"

Jerod: Yeah, and I'm glad you put this case together, Chris, because it really shows tagging well. What I'm going to show is a little bit of a different approach to doing this. I will say this about tagging segmentation — this is one of the areas that we're really going to dive into more on some future webinars to really show you how this works, how it all fits together, and show you how to actually do it on your site.

Jerod's use case

Jerod: Let me walk through my use case here. I'm going to show you some stuff that I've been doing on The Assembly Call, which has really accelerated our growth and accelerated our revenue, too.

We have a bit of a different revenue strategy over there. It's not products, we're much more sponsorship-based and donation-based, and what I've been doing since I brought things over to RainMail has helped out a ton.

My number one goal was to maintain a newsletter-only option because we've always had just a free newsletter, but really start encouraging my audience to register for memberships, which also includes the newsletter. It's a part of the

membership, but I wanted to keep those two separate in large part because of what I saw Brian was doing on Unemployable with having that extra option.

Plus, The Assembly Call lists have always been list-based, so I've got that legacy list there that I have to work with. This will be a good use case for you if you are going to be migrating lists over.

The other thing is I wanted to have two separate autoresponder series for the newsletter and for the membership, but never allow one email address to receive both simultaneously, because there's overlap. I'll show you how to avoid that. I also wanted to include a certain type of post, these "Deal of the Week" posts as part of the membership, but keep it separate so that people can unsubscribe from that but still get the other emails.

There's also a way to do this with tagging, but I'm going to show you a way to do it with lists. Also, I wanted to use my shortcodes [show_to] and [hide_from] on premium blog content to increase the perceived value and drive registrations, which I'll show you. Also to use marketing automation to delight members based on their action. Let me show you real quick here, when you look in the list — the newsletter list was my original legacy list, and then the free member list is my new one with Rainmaker.

I had to figure out with my import strategy and how I move forward, how to maintain that original list while still moving forward with the members. You can see a certain portion of people have gone over to the membership but

the majority of our people like staying on that original newsletter, and I want to keep that option available for folks. The one thing I'm doing now is pushing the membership. I'm going to show you a really quick example of adaptive content.

I'm using the Digital Pro theme. Right there in the hero section at the top, I've got a very simple call to action, "You can either watch our show live or you can join now." This is what people see if they are not logged in. But if I'm pushing the membership then I've got to give people a better experience when they're members, that's why they're becoming members. This is the exact same part of the page but for logged-in members. That's really simple to do using the [show_to] and [hide_from] shortcodes for that access level.

If you're a member and you come here, you can go right to your member area. It's not telling you to "Join Now," because you don't need to see that anymore. The other thing that I've done is I'm using one of the site notices. The pop-up site notice is for people who are not members, they will get this site notice. I'm going to show you in a little bit how you actually set this up. But here, the same thing with how Brian is doing with his and giving people two options — either "Yes, tell me more about membership," or "No, I'll just subscribe to the email newsletter instead."

They get one of those two options that they can choose from, and this has really helped me to drive registration. I know people have been asking about different services that you can use for this. I'm going to get to a question

about that in a little bit. But it's actually built into Rainmaker to allow you to do this with a pop-up feature. Talking now about the autoresponders, I've got two separate autoresponders set up. One for the newsletter, one for the membership. I think this is a pretty common example. Either you have a subscriber list and a member list, or you have a prospect list and a customer list. It would be the same theory, really.

If we look here at the membership list, when people become members I'm re-directing them to this page, "Member Content."

We're going to do some things with that page, so remember that. I'm also subscribing them automatically to the free membership autoresponder, and that's all done in your RainMail settings when you go in and edit the particular list.

Now, when someone visits a page with this ID — and that ID 5539 is the ID for member content — what happens is they are then unsubscribed from the IU hoops newsletter sequence. A lot of our folks start out on the newsletter and then they end up taking a call to action in the autoresponder and becoming members. When they do that, as they hit the member content page — and they can only hit that page, when they're re-directed there after becoming a member — now they're removed from the autoresponder using the marketing automation.

They can't be on both autoresponders at the same time. That helps to alleviate that problem. I want to show you this view of the autoresponders. This is both autoresponders right here. This will give me a chance to show you a couple of features here within the autoresponder.

One of them is — if you look over here on the right at my newsletter sequence, for each of these I've got a welcome message. If you look at this one, I'm showing you another example, basically, of how you could prevent people from getting both messages. As you see here, if the recipient is not subscribed to the free member list then they will get this email. If they are subscribed, they won't get it. It's kind of a fail-safe right now, but it would be an alternate way of preventing that problem from happening.

One of the reasons why I want that to happen is, you can see, I've got some overlap in my autoresponder. This message right here, it's a similar message that I want going out to both, but what's in the message is different. In this one there's a call to action to join the membership, but obviously in the membership sequence there's not going to be that call to action.

Same thing here. If they've already gotten the email in the newsletter sequence, I don't want them getting it twice because it's still basically the same message. What I've done is tagged this email. Now if they have seen it, they are tagged with this tag, if that tag is "Yes," then they won't get this email. That helps to prevent the overlap there. You may say, "What is the benefit of having the separate autoresponder sequence for your members?"

Well, I want to personalize it, and I want to be able to use some of my member shortcodes to be able to personalize these messages, which I can't do over here yet, but in the future will be able to do. Here I can add their member name and use other shortcodes in other ways with the membership features and the marketing automation features to do that. That's how I have them split up and how I have it set up, so that there's no overlap there because then my members will be getting messages they don't need, which is unnecessary and might just annoy them.

An alternative here, as Chris mentioned before, for this one autoresponder ... If you want to do one autoresponder for members and non-members, you could just use your tags and you could have one autoresponder and, using tags, dictate who gets it and who doesn't. If you're tagging your members, then if they are tagged as a member they will get a specific message, if they're not they won't. That's an alternative way to do it if you're going with more of a tag-based approach.

Chris: That's only if the timing works out, because obviously if somebody joins your list and then six months later joins the membership, they might have already missed all of the "Hey, welcome" stuff that the members were getting. You just have to make sure that the timing works out. Or in the membership like I'm doing, if they actually engage with it then you trigger a new sequence that's just for those people that's timed to their lessons, like if it's a course or something.

Brian: Also, let me point out that you don't necessarily have to do it this way. I had two lists for Unemployable out of necessity at AWeber, so we brought them over as two lists. But what I can do right now is contact Services and — first tag all the member lists "member," then ask Services to combine the two lists.

Non-member people are just subscribers, and I can tag them as "subscriber." Then I could send them email only encouraging them to become a member. You can still go from multiple lists to a tag concept fairly easily, as long as you think through how you need to label everyone and how they need to be combined. But that's not a complicated thing. I would have autoresponder sequences like Jerod based on their tag, not on a list.

Chris: When I work out what I'm going to sell them there, I'm probably going to have a customer list and a prospect list just because that's traditionally how it's done.

Brian: A customer list is a third list — or a second list. What you're saying is when they're a customer you don't want to use a tag, you want to make that its own list?

Chris: When I have a customer I'm going to tag them with what they've purchased, but I'm going to have a customer list and when I send a broadcast to get people to sign up to whatever I sell, I'm going to suppress that customer list as I know everybody on that already purchased it. That's my

future planning for how it organizes in my head, but as we're seeing, there's several ways to organize the same thing. That's the cool thing about tags and suppression.

Brian: There's more possibility.

Jerod: It is, and what I'm going to talk about right now you could do this with tags as well. Again, in the example here, we send out these "Deal of the Week" posts to members. It's included in membership.

Members are aware that they're going to get these when they sign up. They don't care how it all works on the backend, but if they don't want to get these deal alerts I don't want them to have to unsubscribe from the whole list, because they may like everything else. You may find something similar. You may send out promos and you want people to be able to unsubscribe from promos and still keep your educational messages or vice versa, whatever it may be.

The way that I set that up is that I've got my individual list here, again, this is just the list that I migrated over with. It's the same thing — when someone visits this page ID, that's the Member Content page that they came to after they have become a member, they're automatically subscribed to this list. And you could do the same thing where you tag them in a certain way. Whatever way works for you to denote that they're going to start getting these emails.

What I wanted to do then is offer people a way to get out of it. If you go to the member content page, I have two buttons right here as people scroll through and they can see all of the content available to them as free members.

If they click on this link right here, they are immediately unsubscribed from those "Deal of the Week" messages. If they ever want to subscribe again, they can click that link right there. That's set up using marketing automation. Inside of the emails themselves — because we know that's where most people unsubscribe — because it's on a separate list, if they just decide, "Hey, I want to unsubscribe because I don't want to get this particular email," now they're unsubscribing from the "Deal of the Weeks." But they'll still be able to get the other messages that they probably wanted anyway.

That's one of the reasons why I wanted to set it up that way, and why I wanted to point out to people and be very upfront, "If you do not want to receive these alerts then easily opt out using the buttons below. But you'll still keep getting all of the other content," so that they feel comfortable doing that.

That gives them the ability to tailor their experience based on their actions and explicit decisions. The other thing too, is exclusive content. What you find is that when you refer to your content as premium and set it up behind a membership wall — obviously it's got to be good content that you put time into — there's a higher perceived value on that and you're going to drive membership sign-ups that way.

If you look at this, this is a full post right here that would be viewed by a member, and this is actually an example of a deal post.

If you're a non-member and you view this, then is what you're going to see. You can't actually get to the deal, its member-only. Now people can either log in, or, again, you're encouraging membership and encouraging them to then get on that email list. Get on that autoresponder using the built-in elements of Rainmaker.

Finally, the reason why I want to do that, why I want to drive members, is I want to use marketing automation not just to learn more about my customers and be able to get them the right pitch and the right call to action at the right moment, I also just want to delight them. My favorite part about what Rainmaker allows me to do is being able to use marketing automation to delight my members.

I've set up a number of these. This one is for the forum. After a person visits the main forum page 20 times — meaning they're a pretty active member, they're doing a lot on the site — I send them this quick email. It's just a really simple subject, "Hey, got a sec." I just thank them for visiting, let them know that on behalf of our team we appreciate their activity, and I ask them a question.

I put this up four or five days ago, and I've already gotten four or five responses back to this email where people let me know things that they like and things that they didn't like about the site. Ways that we can update it.

What I have found for us — again, one of our main ways of making revenue is donations — is that people who have responded to these emails that are sent via marketing automation have ended up being much more likely to become donors in the future. It just adds that personal experience because the email comes from my name and I always respond back to it. You have to figure out if that scales for you, but it's really been a great way for us to personalize the experience and develop our relationship better with our audience.

There's no way I could do this one-on-one every single time. The marketing automation allows me to do it based on the actions that they're taking, then I can come back and respond after I see what they've done, what email they got, and I know how better to tailor my one-on-one message to them too after they reply.

Brian: Chris Staples just asked a really good question. Jerod, you may know this as well because you're farther ahead in implementing your triggers and tags and all that. Is the same concept available if you tag someone with "Gear of the Week" or whatever the case may be? Can they unsubscribe from a tag? Is that why you have a separate list?

Jerod: That's why I set it up that way. I didn't know another way to do that, maybe Chris does. I didn't know another way, and that's why I did it that way.

Chris: Right now, the unsubscribe at the bottom of an email is for the list. If they click "Unsubscribe," they're removed from that list. What I think — like a preference thing, "Are you interested?" I think it would be best to say "interest = deals" and then replace that with "interest = not interested," or in future we'll be able to have "remove tag."

I think lists is the easiest way to do it right now and the cleanest, but if you can modify what the tag value is — the autoresponder example is a good one. You can actually base the autoresponder filtering off what they're interested in based on the content of the tag, not just whether they have the tag or not, but actually what's the text in ... "favorite color = blue" verses "favorite color = red." I think we're going to have an entirely different session just related to tagging because there's so many complicated questions about tags that I could just geek out for 90 minutes just on that.

What will your use case be?

Jerod: My question to you, after we've gone through our use cases is what will yours be? How are you now going to use RainMail to help you build a better relationship with your audience and move forward with what you are doing with your site?

That leads us to our fourth section. These are less frequently asked questions, but these are great questions and it got a lot of really interesting tutorials here

as we go through. Again, I've seen some of these questions already come up and they're going to get answered now as we go through this section.

Does RainMail mean I can now use the platform for my own domain's business email?

Jerod: Here we go. The next question is, "Does RainMail mean I can now use the platform for my own domain's business email?"

We got this a few times. This person says they run it from their current email server through Spam Arrest to Outlook, yada-yada. The answer to this is RainMail is for email marketing, and you can send emails from your business email address: your name at your domain.com. For me, it's jerod@assemblycall.com.

RainMail doesn't replace your inbox. You're not receiving emails and managing emails like an inbox in RainMail, you still need to choose an email provider when you set up your domain. For example, many people use Google apps for this. I did want to make sure that we covered this because we've gotten it a few times. Chris, anything else to add to this in terms of that distinction between what RainMail is and what it isn't?

Chris: I think you covered it. And I think it's important that you do have your name at your domain, not just for deliverability, but also for your authority

and your branding. I personally use Google apps. I have all of my email — Copyblogger, Rainmaker Digital, my own email addresses, my MakerHacks email — it all goes into one Google apps account. I can send as all of those people as well. It works really well for me.

Jerod: I think I'm still using Google apps for mine.

Brian: There's no email marketing service that also provides business email. That's typically a hosting add-on. But of course we use Google apps for everything. Brian@further.net goes through Google apps to the Gmail interface, which I've been using forever and don't want to leave. My emails from Further and from Unemployable actually come from that same email address so people can hit reply and actually talk to me.

How to make sure your emails don't end up in the Spam or Promotions tab in Gmail

Jerod: All right, next question. "In my few limited tests, it seemed the default setting of my RainMail broadcast emails go directly to spam or promotions in the Gmail tab. Is there something I can do on my end to improve deliverability other than create awesome content that people want and will sign up for — that's a given."

So glad that you put that in there because that is obviously the first point is you've got to create content that people want so they'll take a few steps to get it. Here's the answer to this: there are some things that you can do in terms of providing clear instructions for your subscribers, but action has to be taken at the subscriber level.

If you want to paste this URL into your browser, this is an example of my confirmation page when people become a member, if you want to go see what I do. AssemblyCall.com/go/rainmail-webinar. I did a duplicate just for this webinar so you could see it. I'll show you a few screen caps here. Brian, this gets back to what you were talking about earlier with people who sometimes freak out because they don't get a confirmation email. When someone becomes a member or when they subscribe, either one, you've got to continue with the messaging that got them there. You want to be really clear with what they should do next.

For mine, I thank them and I've got a little animated GIF here of a big-shot in Indiana history because I want to delight people but also I want to catch their eye. If they look at this animated GIF, which they will, right below it in big red letters is, "Now do this to make sure you get our emails." I walk through a three-step process.

Step one is, "Check your inbox for a subscription confirmation email," and I've got a screenshot of exactly what that email looks like so they don't have to guess they know exactly what they're looking for. Then the next step I actually

tell them, "Click the link inside the email" with arrows to the link so they can actually see it. I don't want to take it for granted. As I mentioned, "If you are already subscribed to the newsletter then you won't need to do this." That way they know and they're not freaking out and looking for a confirmation email that's never going to come.

You can go to the next level, so you can even suggest that they add the email address that you're sending your emails from to the contact list. Again, be clear. Let them know if you're using Gmail, which is obviously very popular, "Click the down arrow to the right of the reply button and choose the sixth option from the top."

Give them a screenshot right here so they can actually see this. Finally, I tell them to teach their email provider what to do with our emails, Gmail in particular. If their emails are going in the Promotions tab they can drag them from Promotions to the Primary tab and a little message comes up that says, "Do this for future messages? Click 'yes.'"

All of this is on that page so that they can see this so they get it. I've even got a little strategic image placement here so that it draws their attention right down there in hopes that they see it. There's nothing you can do on the backend to improve this. You're with a provider that takes this very seriously, as we already said, and has excellent deliverability.

Brian: Yeah, but this is best practice for every email service. Google does not discriminate on who goes in the Promotions tab. If you're sending out email to more than one person, which is what we're all doing, there's a good chance it's going to go in there. This is really a great example, Jerod. I've got a similar approach on my pages. The only thing that's Rainmaker-specific is there is this capability that if they're already on a list of yours that they don't have to opt-in again. That would be the only thing that you take into account. How do you do that Jerod? I don't see that on the screenshot. What if there isn't an email in their inbox for confirmation?

Jerod: I let them know that right here. Maybe I can make it even bigger, "If you're already subscribed then you won't need to do this."

Brian: That would be the key information, because I've had people that were concerned that they didn't get their confirmation email. We may have to play with this.

Chris: We can do a shortcode for that page that checks the subscriber status to see if …

Brian: Nice.

Chris: I'm going to look at that as something to get in, because we've had a few questions about that too. It makes sense for me as an adaptive thing to know if they're already opted-in somewhere in the system.

Brian: That would be smart. I would also like to add that Chris and the devs are working on an interface for push-button shortcode entry. Shortcodes are the simplest kind of the dreaded "C" word, but we want to make a platform where if you need a certain functionality you just push a button, you don't even have to copy and paste. I don't know when that's coming exactly, but I know it's important to all of us so that we don't have to look up a code or whatever. It's just going to be some way where you know what you need done, you identify it in an interface, you push it, and it's inserted where you want it.

Chris: I'm a nerd, but I forget the parameters. Somebody said to Dan, "I want to change the button text on the quiz," and I said, "We need to do a feature request." Dan says, "You already can." A lot of this stuff that we have could actually do more than I know because I don't know the parameters. We definitely need to have that.

Is there a way to use pop-up opt-ins?

Jerod: All right, the next question: "I enjoy using OptinMonster for visitor-led actions for opt-in. Is there any roadmap for this or workaround so I can start using RainMail over MailChimp for the site?" I showed you an example of this before, but let me dig in a little bit more. I'll also say that I know full SumoMe integration will be coming at some point in the future — it's not imminent, but at some point in the future — plus Rainmaker has a built in pop-up feature already that I'm using.

I showed you this example before where this pop-up will come up and people can either go click on the link to go join or they can get the newsletter instead. Let me show you how you do this. If you go up to "Manage" and then go to "Site Notices," that will take you to this menu. This is where you can create one of these site notices. So the "Content" is where you'll obviously put in all your content. Then, if you go to "pop-up settings," this will allow you to set some of those parameters like, "Pop this up when people scroll down 25%," so you can dictate when they're going to get this pop-up.

You can also put your display settings so that it only comes on certain types of content. For this site, I only wanted it on our blog posts and on our podcast episodes. I don't want it popping-up on the Home page. I don't want it popping-up on the About page if they're trying to find out information about us. I want it to come on the posts that get the most social media activity, because that's where new users come from the most for us. So it's a strategic decision that is posts and podcast episodes.

The other thing I love about using the pop-up notice inside of Rainmaker is that you can assign membership groups to it. Again, if you look at this pop-up, I don't want my members getting this because it's just going to annoy them and they're already members. There's no reason …

Brian: Isn't that the worst? When you're already on the list and you go to the site and you get hit with a pop-up? That is a brilliant application of the membership concept over just subscriber. You know more about them and

therefore can adapt the site to not be a pain. I also want to point out — I don't know if you saw the announcement, but starting in January Google's going to start penalizing sites, specifically in mobile, with obtrusive pop-ups. In true Google fashion, we don't even know what the parameters are, what's acceptable and what's not, but you can count on the fact that we will be identifying what the parameters are of acceptable use.

I've seen some really great slide-over concepts that are much more attractive. I think SumoMe does it. It's not even clear if "Welcome Mat" from SumoMe will be allowed anymore, because it basically dominates above the folds. Google — they're such a pain. But we will be monitoring the situation so we can give you advice on what's acceptable and then, of course, build that into what the platform can do.

Jerod: To set that for the membership part, you just want to go for people who "don't have member access to" and then whatever your member access is so that they will not get that pop up.

Is there a quick and easy way to schedule the web post of your newsletter to the site and then import into your newsletter autoresponder?

Jerod: "Is there a quick and easy way to schedule the web post of your newsletter to the site and then import into your newsletter autoresponder?"

Brian, you talked about this a little bit before. The way that I do this — I can show you that there is a quick and easy way to do this. I just want to say, and Brian, you mentioned this — be careful with email formatting because it can be a little bit different than a post.

I did this just this past weekend. We send out a newsletter on Saturdays. It's posted on the blog and then sent out as a newsletter. I create the blog post first, and then you can just click this "Copy HTML" button and you'll be able to copy the entire HTML from your newsletter. Then, when I go into "Add a New Email" in the content section — make sure that you're in the text editor, and paste it right here.

Now in two, three really quick steps, you've got your newsletter into an email. Of course you can set your template for whatever you want it to look like, but this is so important: don't skip this step of sending a test.

Just because it looked a certain way in your blog post doesn't mean it's going to look a certain way in your email. For example, a lot of times I'll embed a tweet in the blog post version but an embedded tweet doesn't look the same in an email. I do it a little bit differently. I might, instead of embedding the tweet, save the image and upload the image directly so that it looks better in the email. Again, use the preview as a guide, don't rely on it. Send test emails out and check them in different email clients.

This is so worth the extra steps to make sure that your emails look good. I do this every time I send an email. Maybe I overdo it, but it gives me peace of mind and it really makes sure that my email subscribers are getting the exact experience I want them to get when they open their email, and it doesn't take that much extra time to do.

Brian: I also use the test email to force myself to look at every aspect of that email. You start working with content for a while and then you start to make assumptions and scan and not really look. I use that as my last proofreading exercise. There's been plenty of times where I've caught things in that final read-through but I'm reading in the email client so that I notice everything.

If someone unsubscribes, does it unsubscribe them from every group or tag they are a part of under the account, or just that particular newsletter or group?

Jerod: I never don't catch something. I always catch something to go in and update, so it's a great last step. Okay. "If someone unsubscribes, does it unsubscribe them from every group or tag they are a part of under the account, or just that particular newsletter or group?"

We kind of covered this before. It's just that particular subscription. Again, an example is you can go in and look at your individual subscribers. So if you go

to "Manage" and "Subscribers," you can actually look at individual subscribers and see what they're subscribed to.

Here's an example of how that whole sequence with my email list works. I have people that are on the IU Hoops newsletter. This person then became a free member. They are removed now from the newsletter list. They're automatically added to the deal of the week, and they have unsubscribed from the deal of the week, so they're inactive there but still active for the free member list. No, they're only unsubscribed from the specific list they unsubscribe from, not everything.

Chris: The tags persist across the entire subscription. So just because they're tagged on the Hoops newsletter doesn't mean that you can't use it on The Assembly Call free member.

Jerod: Yeah, exactly.

Brian: We don't delete subscribers who have unsubbed because we want to retain the tags and the CRM aspect of it, right?

Chris: We don't charge for them.

Brian: We don't charge for them, which someone asked and I answered, but I just wanted to make that clear. One of the biggest mistakes you can make in AWeber, and I don't know if this is true of anyone else, was not to delete

people who had unsubscribed because you're paying for them, even though you can no longer contact them, at least not by email.

Chris: I've been keeping mine thinking that at some point I might do this remarketing campaign on Facebook.

Brian: Yeah. That's right, there is a strategic use of it. Chris, talk about that a little bit.

Chris: You can export your AWeber list, and I was thinking, "I'll get all these unsubscribes then upload them to Facebook as a custom audience and do an ad that says, 'Hey, come back.'" I found I haven't done that, so I've been paying extra for all these people. But it is a useful strategy, so what I'm going to do is I'm going to export all my list, then delete all the unsubscribes, pay less, and then use it.

How do subscribers "manage their subscriptions"?

Jerod: All right. Next someone asked, "How does someone "manage their subscriptions"?" Really good question. The answer is that right now there's not a built-in way for your subscribers to manage their subscriptions, but you can create subscription management for members using marketing automation. What I'm about to show you will soon work for non-member subscribers as well. I believe I showed an example of this earlier, but for members of my site,

when they're on their member content page here I let them know about these Deal of the Week alerts, that this is member perk that they get.

"But hey, if you want to opt-out, that's fine." Then make it really simple to opt-out by clicking the unsubscribe button. Or, if they want to re-subscribe they can click that button. How do you do that? It's really simple, you use marketing automation and you create a link with a specific ID. For example, this link right here has an ID of "Deal of the Week unsubscribe." So when they click on this they're unsubscribed from the Deal of the Week newsletter. I let them know, "Hey, careful, you're going to be unsubscribed immediately upon clicking."

Then this re-directs them to a page and it thanks them for subscribing and even lets them know, "Hey, if you unsubscribed by accident, click here and you'll be re-subscribed again." That's just reusing this link right here. It's not built-in yet, but you can use marketing automation on a member content page to give your users granular control of which list they're a part of just by using these link IDs.

Brian: Yeah, and it's become apparent that a purely tag-based approach — like ConvertKit, I guess — could really put you in a bind with being able to do stuff like this. On the other hand, a completely list-based approach could quickly get unwieldy when you can think of all the different ways you could segment people. I think this best explains the hybrid approach here. I still think of it as tag-driven, but I understand from Jerod's examples that there are core lists that you're going to want. Chris pointed it out as well.

The three that pop to mind are, content can be all — they can go in any direction they want with all the tags in the world.

Promos — you may want to have people have the ability to unsubscribe from so that they're still receiving your content and maybe decide to come back and entertain an offer later. And then customers or clients. Does that make sense?

Jerod: Yeah, I should be clear too, with how I'm setting this up. Some of these lists were lists I brought over so it was already set up this way. Moving forward, I'm doing everything now with tags and getting more into tags, but for what I've done so far it's been a little bit more list-based. But a hybrid approach like you said.

Is there an easy way to have someone select more than one group to subscribe to or do you have to onboard them and use marketing integration formulas and such and such?

Jerod: "Is there an easy way to have someone select more than one group to subscribe to or do you have to onboard them and use marketing integration formulas and such and such?"

The answer here is if they are a member you can use link IDs and marketing automation as in the previous example. That's how you allow people to select to be on more groups — to be on whatever group they want and you can set up. Whether it's by tags or whether it's by list. If you want to do email versus weekly or whatever it is, this is how you would do it. You're using links, you're giving your users the ability to tell you what they want based on explicit actions. What they're actually clicking on what they're doing.

Can a RainMail mailing list be exported as a CSV file or to Excel?

Jerod: "Can a RainMail mailing list be exported as a CSV file or to Excel? The answer here is yes, and right now this is done by contacting Support. You contact support@rainmakerplatform.com. This will be built into the dashboard in a future platform release, right Chris? We're working on being able to export your RainMail list out via the dashboard.

Chris: Yeah, as the part of the CRM strategy, one of the things will be to be able to manipulate who you've got in there in your database — get them out, get them in, and change everything about them. One of the things will be to get them out to Excel or CSV.

Can RainMail be used to create and track transactional emails in addition to bulk emails and autoresponders?

Jerod: All right. Finally we have this big question which allows us to talk a little bit about the CRM aspect, Chris, so I will direct this over to you. This person asks, "Can RainMail be used to create and track transactional emails in addition to bulk emails and autoresponders?" What this person is saying is, "What about one-on-one email conversations with a particular customer regarding such things as questions or comments, complaints about content, other unplannable matters."

On the other hand, he is saying, "If I have to use my personal email system for that, do you have any suggestions for best practices for coordinating between these other email conversations and RainMail? Tracking opens and clicks the way RainMail does. Seeing sequence of events in the relationship."

As this questioner says, the bottom line is that he wants to have a complete picture of his relationship with all subscribers, prospects, customers, and collaborators — all in one place. How can and or how will RainMail help him to achieve that, and how does it fit into a bigger picture of contact management?

Chris: We have the same situation, so when we're looking at what we need to do we want to roll it out for you guys as well. One of the things that you'll have noticed is when we say contact Services, usually we say contact Support who will put you in touch with Services. Or there's some kind of a form that we

send you to that says, "Fill in this form and that'll send your inquiry." The reason is because of CRM.

We want to track that conversation with you so that we've got your entire history. So when Support or Services want to look into your situation they know what we've talked about in the past. We completely understand. The CRM is going to need to have that history in there. One of the things that we're looking at is the ability to be able to send an email to a certain contact — a one-to-one email to the certain contact — so that you've got that history in there and you can add the notes and everything.

The other part we're looking at is integrations. Although we've only talked about RainMail today, what we've said is it's a fully-integrated system. So when we're looking at email, when we're looking at CRM and marketing automation, we're also working on the membership side, we're working on the underlying foundation, the API of the site. When we've got an API it means we can then integrate with things like Zapier. You'll be able to use your Rainmaker site and integrate it into your other CRM systems through that. That's not coming suddenly, but we've got some high profile people who are begging us to have third-party integration ability because they have all these support ticket systems.

They have the CRM, they have the sales database, or they have different systems they want to tap into. Both of those are going to be covered by the

CRM, but if you've got particular ways of working, particular workflows, I'd like to hear them. Because that's what we want to build to — to your use cases.

Brian: Hey, Chris, I know we talked about the email pricing list. Do we have an easy link to the pricing table? Sharon is asking about that.

Chris: Easy link?

Brian: I know it's like a pop-up on the site for new people.

Chris: If Daisy can't find it I will have a dig around and I'll try and find it.

Brian: Yeah, we need an easy way — we should send that out by email to everyone so they can know. Why don't we plan on that? We'll send out the price list when we send out the recording link.

Chris: Cool, that's a good idea. That's better than me making noise and typing.

Jerod: All right, so we've gotten through a lot of the questions that you all asked. Again, unbelievable questions, thank you for submitting them. As we come to the end here, you may be thinking, "Now what's the best next action to take?"

Obviously we've gone over a lot of different things, so what's the best next action to take? The answer to that is going to be based on where you are. If

you haven't started yet, it may just be to set up your RainMail account. Again, you get your first 999 subscribers free, so you can go onto your dashboard, try it out, and get set up.

The next step, if you've already done that, would be to migrate your list. If you've got your RainMail account set up, contact services@rainmakerplatform. com and Daisy will be able to help you get your list migrated over. If you've done that, your next step may be working on your design. Remember to send yourself test emails to preview it live in an email client. I want to keep harping on that because it's so important.

If you've done that, you may be ready to start creating your first tags. The earlier that you can start doing that and start using the actions of your customers to learn about them and be able to tailor content and tailor an experience to them — you're better off. The first one to do may be "prospects" and "customers," those are two very simple tags to use that you know in the future — even if you don't know exactly what you'll do with them yet, you can create them now so you can start building the data. Maybe you've done that. Now your next step would be to create an autoresponder.

Brian: Back up, you didn't mention that migration of lists is free.

Jerod: Oh yes, migration of lists is free.

Brian: We do have paid services, but we're not going to charge you to migrate over your email list, of course not. Is there any other bright line between stuff that is reasonably priced — because we're not trying to be an agency, we're just trying to help you — and then stuff we do as a function of support. Migration is the one thing that pops to mind, but I'm not sure if there's anything else.

Chris: Converting design into a theme would be a paid.

Brian: Right.

Chris: That's another reason why we encourage you to go through Support, because it could be something like, "Click here," or it could be, "Services will do that and that's free," or it will be, "We'll put a proposal together." We're not going to charge you on your store credit card. We'll actually tell you, "It'll cost this." There is a menu of services coming, so we'll be able to send that out to you as well to say, "This is what we can do for you."

Brian: Jerod also talked about stats. There seems to be — because it was left out of 2.6. I know you mentioned it, but I think you need to go back over that again. Just show how you go through a broadcast. Yeah, okay.

Jerod: Yeah, I'll just take one of these that I sent earlier today, actually. This is already sent. You can see it says "Published," so that's already sent. If I click on "Edit" for this, then the first tab that comes up will actually be the stats.

Brian: Actually, you can just click on the headline, Jerod.

Jerod: Yeah, you could do that too.

Brian: Edit seems counter-intuitive. You just want to click on the headline and the first thing you'll see are your stats. That's the only reason I revisit an old email — certainly the first time — is to figure out how it did.

Jerod: Exactly. Then you can go back through and review who you sent it to. If you want to get the content — that's important too, if you have an email and you want to use it later. Maybe you decide, "Hey, this worked really well. Let me put this into an autoresponder." Then you can go back into those old emails and then you get your content out really quickly.

Chris: It's only broadcast emails right now, but we are working on autoresponder stats. They're a little bit more complicated because we don't know when they might have opened it and things.

Brian: It is harder, but I'm glad we're doing that because AWeber didn't offer that. I was always blind about my automated messages, and that's good data to have.

Jerod: Yeah, it's really good data to have. Especially finding out what links people are clicking on, which ones they're opening so you know what to do with it.

Anyway, in terms of the next actions, if you've created an autoresponder, then add a form or membership check-out page and then start building your list. And that's it. That brings the presentation to a close. Brian, any final thoughts here before we sign off for this session? Obviously we're going to be planning future sessions to continue digging in — not just to RainMail, but other Rainmaker features as well.

Brian: As an overview, I've seen some comments where people are like, "I feel overwhelmed in a good way," and there may be people who feel overwhelmed in not such a good way. Just remember, this is an overview so that you understand what's possible now, and in the very near-term the improvements that we're going to constantly be making to RainMail — not only as an email service but again, as that integrated core of a powerful website with marketing automation capabilities.

As we go forward with these customer-only webinars, we're going to start breaking things up into more discreet topics so that, "Okay, we're going to do this one thing today." I think you'll really appreciate that. For email veterans, they get everything that was talked about in this webinar pretty much, they just had to know whether RainMail could do what they needed or not. Just don't get overwhelmed.

Jerod: Mr. Garrett, any final thoughts before we sign off?

Chris: Yeah, we do these webinars for you, so tell us what you want to know, what you're confused about, what do you want to hear more about. Do let us know and we will build webinars around that. I know it's been a long one today, but hopefully the replay will help you. You could skip to the bit that you really want to see.

Brian: Some people have asked for the slides. Can you make those available, Jerod?

Jerod: Yeah, absolutely. We'll send out an email once the replay is ready. If you asked a question, you probably noticed that it made its way in here unless your question was a half hour before and I had already finished the slides. In the future, we're going to keep opening up that forum. Like Chris said, we want to know what your questions are, so definitely let us know no matter how specific it is. That's what we want to know so that we can tailor these presentations to be as useful for you as possible.

All right, with that said, we wish everybody a wonderful day. Thank you for being here, we will let you know when the replay is up. Have a wonderful day and we will talk to you soon.

Brian: Thanks, everyone.