

Productive Insights Presents

# 177. Active Campaign Email Automation Strategies with Barry Moore from The Active Marketer



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## Links Mentioned:

- [Free Onboarding Automation](#)
- [Free Coupon for ActiveCampaign Quickstart Training](#)
- [www.TheActiveMarketer.com](http://www.TheActiveMarketer.com)
- [www.GetMeToDone.com](http://www.GetMeToDone.com)
- [www.Productiveinsights.com](http://www.Productiveinsights.com)
- [www.YouTube.com/ProductiveInsights](http://www.YouTube.com/ProductiveInsights)
- [www.CallAshRoy.com](http://www.CallAshRoy.com)
- [www.PremiumProductivity.com](http://www.PremiumProductivity.com)

## Related Episodes:

- [001. Neil Patel \(Kissmetrics Founder\) On How To Make Better Decisions Around Client Selection, Branding and Investing](#)
- [005. Jake Hower \(Fuzed App Creator\) On How To Increase Customer Retention Through Automated Marketing](#)
- [170. Ryan Deiss From Digital Marketer Reveals The 5-Step Conversion Funnel That Turbo-Charges Your Business Growth](#)
- [171. Email Marketing Success Strategies Revealed with Co-Founder of Digital Marketer Richard Lindner](#)



# How to set up your marketing automations to mirror real life sales situations using a clear tagging strategy

Imagine this.

It's 1995.

You want to buy a pair of shoes so you walk into a shoe store.

You're greeted by a salesperson. He's polite and genuinely tries to help you solve your 'problem'.

He asks you what you're after. Do you need dress shoes? Or running shoes? Or casual wear?

He asks you if you have any special requirements. Do you have flat feet?

After having carefully understood your needs, he shows you the *right* pair of shoes to suit your specific needs and explains why these shoes are the best solution for you.

Would you buy the shoes from him?

You'd probably buy the shoes from that salesperson, right?

Well, it's no different in the online world.

Sales funnels work in the same way. Except they typically happen online via email marketing automation.

When you build a sales funnel, you first build trust with your customer by understanding their problem.

You then send them solutions (often in the form of online content) that's specifically targeted to their problem.

You deliver some a meaningful transformation through that content in the context of that problem they're trying to solve.

After having delivered value to the customer you then (and only then) offer them a product that's **relevant** to them and their specific problem.

**In this episode**, Barry and I explain marketing automation using the 'shoe store' analogy.

We explain online funnels and automation sequences within the context of you buying a pair of shoes.



# How to segment your list using tagging to ensure you're always relevant and useful to your valued customer without having your email marketing efforts turn into a complete mess

Barry and I then talk about tagging and how to use tagging to stop your email lists turning into a complete mess.

Tagging (as opposed to creating separate email lists based on segments) means you can have ONE list and still talk intelligently to your customers.

You can send them information related to their specific problem. You can help them solve one problem at a time and improve your deliverability rates (we'll touch on this later)

Tagging enables you to stay relevant and useful.

In a crowded market screaming with irrelevant offers, this is an excellent competitive advantage!

## How to improve your email deliverability by sending targeted content to your list based on each person's chosen preferences

Besides making you appear very relevant, tagging also makes you appear far less spammy to your audience.

Because your audience is receiving information tailored to their specific needs, they tend to interact with your emails more.

They open your email more often, they scroll through them and they click on the links within the email.

These are signals to the email providers (like Gmail or yahoo) and result in higher email deliverability rates.

Better deliverability means your emails are less likely to end up in your audience's spam folder. That leads to better open rates, which leads to better click-through rates.

See the virtuous cycle?

The reverse is also true.

Spam your audience with irrelevant content and you'll end up with poor open rates, poor deliverability rates and you'll be on the fast train to mediocrity!



# How to use event tracking to watch your customer's behaviour on your website and then use that information to serve them better.

If you haven't already set up event tracking, I recommend doing so right away.

Event tracking with Active Campaign allows you to watch your customer's behavior on the website and get clear on how they're interacting with your content.

What's event tracking?

It lets you track virtually any contact behavior that you define on your website.

You can track video views, button clicks, orders, log ins, in-app behavior, and more.

To set up Event Tracking, you'll need to create customized code for each event you'd like to track on your website.

**Site Tracking** is a type of Event Tracking. [Learn more about Site Tracking here.](#)

Active Campaign is just one of the many email marketing tools out there. There are *many* different email providers out there. InfusionSoft (now known as Keap), Drip, Ontraport, Campaign Monitor and lots more.

Use the one that works for you but remember: the best software is a software that you use – so decide on one email provider and then run with it.



## Email marketing automation can and should be used for customer retention (not just customer acquisition)

Most people think of email marketing as a tool for sales funnels (customer acquisition).

But there are other very powerful ways to use email marketing. And one of those (relatively untapped) ways to use email marketing is for customer retention.

Use this effectively and you'll be streets ahead of your competition.

Great quality products not only offer a solution to a customer problem but they also have epic after sales support.

Great companies look after the people who've taken a chance with them by looking after them through after sales support.

They care about improving the user experience through the life of the product.



## Use your automation to tell you when and how to follow up with your customer

Ok, so we've talked about using email automation for sales and customer retention. But there's yet *another* powerful way to use email marketing.

This applies particularly to continuity offers like membership programs.

And that's setting up triggers to notify yourself of critical points in the customer journey and then use those notifications as prompts to connect with your customer when they're least engaged.

Doing this means your customer is less likely to churn and you're more likely to save a valuable customer relationship and continue to serve them.

Here's an example.

Let's say you've identified a pattern that shows your customers tend to leave your [membership](#) when they haven't logged on to your membership for 3 months or more.

You can have your automation send you a notification at the 2-month reminding you to reach out to your customer and ask them if there's anything you can do to help them get value from your membership program.

Maybe you jump on a member call with them to see how you can help them better.

[Have a listen](#) to this episode or [watch it](#) on our YouTube channel to dive deeper and take your automation to the next level!



# Barry Moore and Ash Roy Video Transcript

## (This transcript was created using Artificial intelligence. There may be some errors)

Barry Moore: 00:00

For good onboarding sequence. It's gold, and I've got one year your listeners can download for free. It comes with three email swipe files in and just fill in the blank. Put it in tomorrow and you're ready to go. Literally, just copy and paste your link in there, put it in and your active campaign account and fill in the blanks and you're ready to go.

Ash Roy: 00:18

Perfect, well we will have that in the show notes and the show notes will be available at [productiveinsights.com/active-campaign](https://productiveinsights.com/active-campaign).

Ash Roy: 00:33

Welcome, everybody. Welcome back to the productive insights podcast. Barry Moore trained in the United States Marines as an FA18 pilot and he served for about nine years after which he turned his attention to the corporate world. He launched the active marketer podcast around the same time the productive insights podcast was launched and I remember the time when our podcasts, we're both in new and noteworthy. We'd kind of launched it together, so that was pretty cool. The reason the active marketer website exists is to put the tools and tactics that the big guys use into the hands of every business owner. Whether you want to create high converting lead magnets to grow your email list or you want to create an automated selling machine, the active marketer can help you. Through the popular courses and the active Marketer Academy of which I'm a proud member, Barry Moore can put the power of sales funnels and automated marketing to work for you so you don't have to do the heavy lifting in growing your business profitably.

# Transcript

Ash Roy: 01:35

Now, make sure you stay all the way through to the end of this video if you're watching on youtube or the audio, if you're listening on iTunes or any other podcast application you listen on because Barry is going to share a 20% coupon code which will allow you to get access to his training at a special discount. So make sure you stay through til the end. I'm delighted to welcome my friend Barry Moore from the [activemarketer.com](http://activemarketer.com) welcome Barry.

Barry Moore: 02:04

Thanks, Ash. Thanks for having me. Excited to be here. Thanks man.

Ash Roy: 02:07

Great to have you on, Barry. Look, you're one of the few marketers that I actually respect. You have some really great strategies, some really great content, particularly around tagging, which we'll talk about later. I'm delighted to have you on the podcast. I'm a bit disappointed that I haven't had you on earlier, but I'm looking forward to doing a few episodes with you over time. So, you know, I see this as the beginning of a series. Today we're going to be talking about sales funnels and automated marketing. So let's start off there and talk about how you would describe a sales funnel and why our listeners should consider using sales funnels and their business to grow their profitability.

# Transcript

Barry Moore: [02:46](#)

Well, you know, there's a lot of hype around the word funnels and sales funnels, but really it's just the steps in a process, that you would take to create a conversion and create a sale. Now, if you ask most people in any kind of business, you know, what's your process for, for landing a sale? Sometimes they don't know, but there's always a process there. So if they have a sale, there's a process there because the result of the process has happened, there's a sale, right? So, a sales funnel really is just kind of documenting, discovering, first of all, if you don't know, but discovering and the documenting those particular steps that it takes to get a stranger who's never heard of you before, into a customer and then hopefully a repeat customer as well. And once you've got those steps documented, and investigated and documented, then you can build, there are certain pieces of software that you can use to kind of build those steps into the software. So that process is happening automatically behind the scenes and you're not having to manually repeat it every single time that a new person comes into your sphere of influence.

Ash Roy: [03:54](#)

Does that make sense? Yeah, absolutely. So let me just kind of demystify that a little bit further. 20 years ago you'd walk into a shoe shop if you wanted to buy a pair of shoes. We're talking to the salesperson at the shoe shop, in marketing. They would call this the first moment of truth and you would ask them a few questions. If the salesperson didn't seem like a shyster and wasn't sleazy and didn't do dodgy stuff, you would probably buy that product from him, even if it was a couple of dollars more expensive than the person next door because they earned your trust. We're just looking to replicate that process using the amazing power of the Internet through content and automation.

# Transcript

Barry Moore: 04:34

Exactly. So let's take that example a little bit further. Right? So someone walks into your shoe shop, well first they have to know about your shoe shop, but let's assume that they do and they walk in and then there's going to be a discovery process between you, like you just said, between you and the customer. Their customer has to learn to know, like, and trust you and that you're not trying to rip them off or just not trying to, you know, just get the sale at whatever means. So you've got to build a bit of no lack in trust. And then there's a series of questions you're probably going to ask that person. Well what kind of, what kind of cheese are you looking at? Are you looking at a dress, shoes, anything, and casual shoes, right? And you know, athletic shoes. If you're looking at athletic shoes, what kind of left, you know, do you do Crossfit, weightlifting, running?

Barry Moore: 05:11

So there's a bit of a discovery phase where you're trying to figure out what their needs are and once we've determined what their needs are, then we can provide them more content. So they say they want a running shoe, for example. All right, well what kind of running do you do? Is it kind of like short course running or a marathon runner? You know, it's very trail running versus straight running. Very different things. So now I'm starting to provide them with content based on what their needs are. And now that I know their needs, I know that they're a marathon runner and I know that they like to do trail running. I'm going to start moving them towards the trail running section of the store. Right? Yeah. And then we're going to go through a couple of different shoes and I'm going to talk about all my experience in all my different customers that have tried these different shoes. And I think, you know, based on what I know about, yeah, the issue is going to be the best, right? And some build some no, like and trust with that customer and then eventually close this out, right? So yeah, you can build all that kind of stuff into your marketing automation, you know, all the way through to the sale and then post-sale as well. So it's just a matter of kind of taking that, that real-world example and then replicating that in the software.

# Transcript

Ash Roy: 06:13

Exactly. To your point earlier on when you're trying to find out whether they want a pair of running shoes or dress shoes and so on and so forth, that is basically the process of solving a problem and making your solution or your product, I should say relevant to the customer's problems. So if they want to be a runner, then you're not going to offer them dress shoes. You want to offer them running shoes, but do that to do that exploration, that discovery, you can do that using content. And we'll talk about in future episodes, what is what you call tagging. And I absolutely love this because it allows you to be relevant and not be spammy in people's inboxes. You're just sending them content that is relevant to them. And if you combine what we are going to be talking about, Barry, in terms of tagging with what I talked about with Andre Chaperon in episode 140 where we talked about email and marketing automation, you can be hyper-relevant and hyper-valuable to your audience and really be of service to them. Exactly. So now that we've explained what we mean by sales funnels and how then no big mystery that just replicating the manual process that happened 20 years ago in a shoe shop, it still happens today. And it still happens today. Yeah. let's talk a little bit about how you create this using your tagging strategy, in active campaign. Let's just touch on that,

Barry Moore: 07:49

Right. So, you know, in that example that we use where we were driving, we were trying to take a broad scope of every customer that walks into our shop and we were trying to narrow that scope down to find the product that exactly fits that particular person. So as we talk about this guy, this particular person that came in, you know, we determined there were a trail runner, so this product is right for them. Whereas it might be a businessman who wants more business shoes. In their case, this item over here is going to be what they're looking for. They're not, don't want trail running shoes, right? So, the act of tagging is to start putting people into those different groups, you know, businessman versus athletes, a trail runner versus road runner, a sprinter versus distance runner. And trying to niche that down as far as possible.

# Transcript

Barry Moore: 08:35

So, as you said, the content that we offer them is the most relevant content to them and what their needs are. So, you know, the first part of it is discovery. So what does this person, you know, who is this person and what kind of category or what needs do they fit in a, and then we just keep her finding that and we're finding that you know, kind of like those, you know, I don't know if you're familiar with those, like Japanese Pachinko Games where you dropped the ball and the top and it just kind of ta and ends up in a slight down the bottom. And that's kind of what we're trying to do with these, these new people that we have no idea about. Right. And especially online where you don't get to see them face to face, you know, we're trying to put them into their appropriate slots.

Barry Moore: 09:15

So what we offer them is what they're after, or even if they don't know that at that point. So we sort of go back to your original question. So as they take certain behaviors, throughout our website and throughout our email marketing, we're giving them tags, right? So, if they've, if they're on our website and they're looking at running shoes on our website, well I that would indicate to me that they have an interest in running, running. So I'm going to tag them with a, you know, interest running tag so that I know that they're interested in it. And then I might also track how many pages they look at it. They looked at 10 running related pages. I know there were really interested. So that may be a trigger to start sending the more running related content or current races or case studies of people who've come in and got a special fit of the shoe and cut 20 minutes off their marathon time or whatever.

Ash Roy: 10:04

Right. And why don't you explain to our audience, Barry, why traditional segmenting as it was done before with lists ends up being to use your words a dumpster fire and, why tagging is a far more elegant solution in terms of segmenting your list.

# Transcript

Barry Moore: 10:26

Yeah. So in the early days of email marketing, well actually it still happens. I'm still shocked that people are still using stuff. Like they'll chip and Aweber and stuff like that. But Aweber is kind of like the cassette tape of email marketing these days, but, you would have to, if you want to one of these segments, you would have to create a separate list, right? So you'd have a business list and you'd have a casual list, you never runners list, you'd have a marathoners list, you'd, you trail runners list to sweet runners list. , and you as a customer, Ash, You may be on four or five of those different lists.

Barry Moore: 10:58

You know, you may run during your leisure time, but you know, you have a job at work, so you need business shoes as well, and then you're going up for dinner with your family and unique casual shoes, right? So you might be on all of those lists for, as an example. So, well, one, that makes it very hard for me to get a, a uniform picture of who you are and what you like, right? Yeah. I'd have to go into all these different lists and see if you're on all these different lists. , and some products like Aweber will charge me, , based on how many, you know, how many times you're in the system. So if you're on four list, I'm getting charged four times for you as a contact, right? So 500, 500, 1000 limit contact limit in my account, your account, four times.

# Transcript

Barry Moore: 11:41

If you're on four different lists, which doesn't make a lot of sense, and then it becomes very difficult for me to track. You know, if I wanted to send this email out, hey, there's this, there's a sale on casual and athletic shoes this weekend, and I send that out to both lists. Now you're getting two emails, right? And you're getting this. And I just looking competent now because I've sending you a repeat message and like, Oh, you know, I'm saying it's topped with a message. I'm saying, Hey ash, like I know you and I have a relationship with you, but you're getting like three emails and you're like, well, this guy's an idiot, right? Because we're not being relevant and I'm not being relevant, right? And I'm spamming the crap out of you. So, a better, more efficient way to do it would be having a single list or a very few number of lists and put tags on you based on your behavior.

Barry Moore: 12:25

So you've come in and bought casual shoes from me before. So I put shoes, casual tag on there. You, she's an athletic tag on there. She's trail running tag on there. So I can open up that a contact record of yours and I can see, okay, Ash works, you know, he must work from home, he doesn't want any business shoes, right? So, you'd like to trail running. I can see a uniform vision of you as a customer whenever I want to and then I can, I can target emails to just specific segments of that list. So I want to target this email to just everyone who does trail running. Hey, the Brisbane trail running nationals are coming up in two months, kind of get yourself some new shoes, right? And that can just go out to those people who have that specific tag and it's ultra-relevant to them.

Barry Moore: 13:10

And I'm not bothering everybody else with content that they don't care about. Does that make sense?

# Transcript

Ash Roy: 13:14

Absolutely. It makes perfect sense. This solution also reduces spam because you're not going to end up sending content that's not relevant to people. And that is the key that I want to really impress upon our listeners. Let's have a quick,

Barry Moore: 13:30

Can I just, I want, let me just show something about that. So obviously you don't want to spam people with stock or not interested in, right? You, you would rather be a more much more relevant to them and their lifestyle and what they're after and what problems are trying to solve. So you're being nicer to your customer obviously by giving them content, but you're also kind of being nicer to yourself because the, those emails that go out that are hyper-targeted to specific interests, they have a much bigger open rate and a much bigger conversion rate, which number one means more sales for you, obviously number two.

Barry Moore: 14:02

It also means that all those spam filters out there in internet land are seeing your emails get opened more often and links clicked on more often. So you get a better sender reputation with your ears, right, and they and they have a much better chance of ending up in the inbox as opposed to the promotions of box or the spam folder or whatever. Because you may have 60 you know, I've seen 60 70 80% open rates with you know, 40% click-through rates because they're hyper-targeted and, and Google and all those spam filters are going to see that they're going to go, hey, this guy is sending valid messages that people want to hear about. Let it through.

Ash Roy: 14:37

And let me unpack that a little bit more because of [Richard Lindner](#), one of the founders of [digital marketer](#), I explained it really well in [episode 171](#) and the way he explained it as this, the main deliverers of email services

# Transcript

Ash Roy: 14:52

like Gmail, Yahoo, MSN, what they do is when you send an email to your list, they opened the pipe a little bit and send through a few emails and watch how your recipients are behaving with your email or they're scrolling through it. Are they opening it or they just moving it straight to junk? Are they deleting it without opening it? And depending on how the first few people behave, they then open the pipe fully, but they decide on whether they're going to send it to the spam folder or they're going to send it to the promotions folder and so on. So the point here is that if you are hyper-relevant, people are more likely to interact with your email. They're more likely to scroll through the contents and more likely to click on the links. And not only will you have better open rates, but you will also have better what is called deliverability. Deliverability means more people are going to interact with your emails and you're going to end up having a cleaner list. And really when it comes to email marketing, less is more. So if people aren't interacting with your emails, you should really be taking them off your list and not talking to them. Yeah.

Barry Moore: 15:58

And you know they had to hold deliverability things. A bit of a black art. Nobody really knows for sure. But there are certain concepts that most people agree on them, you know, and that certainly one of them. And the other thing to consider is even down to the point where Gmail for example, you know, they're going to have, so your sender reputation, your deliverability in mind, but Ash, your personal preferences on what you put into which folder will also determine what g-mail does with it. So it can also go down to an individual level of the person, hey, this person's clicked on similar emails in the past, so we'll let this one through as well yeah, so the more targeted, the more relevant you can be with your messaging. It's, it's good for the customer and it's good for you in the longer term as well.

# Transcript

Ash Roy: 16:40

Great. Now, this ties in very beautifully with an SEO strategy. I'm not going to go into too much detail, but if you're very clear about the areas in which you want to put your content, you can align your email strategy with your SEO strategy. So, for example, if you're a shoe store and you want to talk about running shoes and dress shoes and casual shoes, then you might have three categories of content and you optimize your website around dress shoes, running shoes and casual shoes, and your email marketing will also be around dress shoes, running shoes and casual shoes. And there's a congruence which actually can lead to a nice holistic approach to your general marketing efforts.

Barry Moore: 17:23

Yeah, and what in what most people who haven't really got into the marketing automation space may not know is tools like, you know, active campaign, for example, can also do site tracking. So once you've opened an email from me and you've, you've subscribed to my list and you've clicked on the link, I know who you are because you've taken the next time mean. So, the software can then track everything that you look up on the website. So if you're spending all your time and the athletic shoe area that's you talked about, I can track that. And behind the scenes. And I can say, right if this guys like, just like you said, if your contents are organized the right way, you know, my shoe stores slash athletic slash you know, running or whatever, anytime somebody goes to that slash running area or slash athletic area, I can track that and I can, I can put a score against that customer and says, you know, 10 20, 30, 40, hey, once it goes chips over 50, let's start sending them more information about athletic shoe sales clinics and we might be running coaching clinics, whatever, whatever content.

# Transcript

Barry Moore: 18:26

We've got to get case studies to get people in, to buy some more shoes. But, but I can track the behavior on this site as well as the behavior, all the emails that they open. That's interesting. And is that lead scoring, Barry? Well, you can, there is leads going but the site tracking in and of itself is a separate thing. So, and you can do things like without lead scoring, you can do things like, you know, if they viewed this page three times, that's a trigger to fire an automation that says, Hey, send them this. Send them a discount code. Hey, you know, you've looked at this page five times, there's something that's not getting you over the line. If you keep going back to it, you've, you've clearly shown an interest in that content, but you haven't, but you know that I can check instead of look if they'd been on this page five times, but they haven't been on our thank you page, which means they bought something, right?

Barry Moore: 19:18

If they got all the way to my thank you page. So if you've viewed the content five times but you haven't ended the thank you page, you clearly have an interest but something's holding you back. So I might start sending you more content about why the shoes, the best shoe in the world and look at all these famous runners that use this shoe and how here's a couple of people came into the store and here's what they said about buying this particular shoe, right? So I'm providing you a little bit more information to get you over the line and an address, address any common objections you might have to try and get that sale. But that's all based on your individual behavior. It's one email going out to you and exactly the right time. It's not a broadcast at 10,000 emails going out to everybody. It's one single email going out to one target customer at exactly the right time, the right message to the right person at the right time.

# Transcript

Ash Roy: 20:00

And that is the beauty of active campaign. I really am a big fan of the software. Now I don't know much about a lot of the other existing bits of software, but I have used campaign monitor, which I found woeful Aweber many years ago. It was awful. But what about people like confusion soft? I mean, sorry, infusion soft. Do they have these capabilities?

Barry Moore: 20:24

Yeah, a lot of the upper tier kind of marketing automation platforms getting Infusionsoft, ontraport, active campaign, drip. And there are a few other smaller players. A lot of them have very similar features and I often get the question like what's the, what's the quote unquote the best one? And having worked in it for a long time, there was no such thing as the best one. There's the one that matches your requirements the most, right? So if you go into it with no requirements, you can, chances are you going to end up with something that doesn't, you're going to have to pull out and rip out, throw away anyway. So if you're going to think about doing this, it's probably, well, it is crucial that you sit down and go look at, these are the features that I needed.

Barry Moore: 21:07

If you don't know, play around with a couple of trials from a couple of different platforms. Most of them will have like a 14-day trial, 30-day trial. You can play around with, come up with some, you know, three or four big-ticket things and say, I must have this, this is what I must do. And then evaluate each one of those products against, against your requirements. There's no such thing as quote and quote the best one.

# Transcript

Ash Roy: 21:29

I think it was episode five where [Jake Hower](#) said something that still stays with me to this day. And that was the best software is software that you use. Yeah, exactly. Right. I think that's a great point. Now, active campaign has recently released something called conversations. Is that like bots or something or how was that?

Barry Moore: 21:50

So yeah, one of the things I really like about active campaign is they're constantly kind of pushing the envelope in and coming up with new benefits and features and their software. And it's, it's a constant stream, which is great, but it's hard for me to give up some of, but, short conversations, you've probably seen like that intercom feature on a lot of websites where it pops up a little chat box and it says, hey, you know, ask us a question and what are you looking for? Right, so what active campaign is doing is integrating other channels into their marketing automation other than just email. So, you, you can have a chat feature there, but you can also have conversations which, which may or may not go through, your traditional email as well. So you can kind of think of it like a help desk system where someone creates a ticket in the back of the system there, that ticket sits there and until it's closed or resolved or the question has been answered or whatever.

# Transcript

Barry Moore: 22:48

So they're building that into their, their software. So, you know, they've got a couple of different tiers and a couple of different levels to their software. One of those tiers has a lot of sales pipeline stuff for more kind of conventional sales. If you're selling a car or you're selling something that someone's not necessarily going to buy online, you can, you can have different stages in that pipeline. So this basically kind of adds on to that where you can keep conversations from a customer, all the back and forth you've had with that customer, over time so that, you know, when they come into the showroom or whatever, you can just pull it up and go, okay, this is everything we've said to this person ever. Those all questions they've had all the objections that they've had. This is all the questions I've asked us. So you can kind of keep that. So it's just a way of incorporating other avenues of talking to your customer and other just email into the product.

Ash Roy: 23:39

Yeah, I agree. Active campaign is always pushing the envelope. They are trying to innovate. There have been a bit buggy at times, but overall I think it's a great piece of software and you can start for only \$9 a month, which is another thing that I absolutely love about it. I have seen other marketers promote things like ontraport and I've got nothing against ontraport, but the entry point is considerably higher. And using ontraport for a small business, it's like trying to cut a carrot with a chainsaw to quote somebody else. That's good. Yeah. Yeah. So I think that active campaign kind of caters to people at different levels. I really do like the software and I like the culture within the company. I like the way it's going. I like what they're trying to do. I highly recommend it to all of my members on my membership site or in my community. So yeah, I think I'm with you on that front.

# Transcript

Barry Moore: [24:31](#)

Yeah. Here's the, you touched on an important point. Whenever you're buying any software that's going to be crucial to your business is one that fit your needs, like we talked about getting, but also anticipating what your needs might be in the future so that that software can grow with you. As your business grows, hopefully your business grows and becomes huge. So all of these features that you don't necessarily need now, you may need them in the future. So, active campaign is great and that way you can, you can come in for a very low cost. So if you, if you've got an active campaign and you never used it for anything other than what you're using MailChimp or Aweber for now, it's probably still a good investment because it can grow with you as your business grows and then you can, when you're ready, you can slowly add some more automations and some more email campaigns and, and all that and some more integrations. And other good thing about is that integrates with almost everything. Yeah, so you can add those as you need them, but you don't, you don't have that big outlay. Like you said, you can start small, but the product will grow with you as you grow. So cool. It's not too many around like that.

Ash Roy: [25:31](#)

I personally haven't used drip yet and I don't plan to, but I've seen a bit of a take-up uptake I should say of drip and maybe some people moving to convert kit. I noticed [Neil Patel](#) who I had on [episode one](#), he seems to be using ConvertKit these days. Maybe one of his lists or something. Could you talk to us about a case study around how you helped a business get some really significant results that we're hopefully measurable as a result of these active campaign based automated funnels?

Barry Moore: [26:04](#)

Yeah, sure. So a lot of the time people, people focus on the sale, which obviously is very important. But the thing that automation could do for you as well as also you, it can automate what happens after the sale.

# Transcript

Ash Roy: 26:21

Oh, Yes.

Barry Moore: 26:22

One of the customers are, ours was a martial arts academy. So we were talking about, you know, what their biggest pain point was with their client base and it was the fact that there was a lot of churn. So, you know, there was a lot of people kind of dropping out at the three or four-month mark. You know, they've thought they wanted to come in and do martial arts and they would come in like once twice and then they get three or four months into it and they would go and they would decide, you know, I hate it. I'm spending all this money on my membership but I'm not really going so I'm just going to cancel it. So we sat down and we figured out, right, so you spending all this money getting new customers, let's spend a little time keeping the ones we've got and getting them more engaged.

Barry Moore: 27:01

So we figured out what kind of, what the magic time frame wise about when they're, when there were most likely to cancel their membership, which was like a three and a half month mark or something like that. So a month prior to that we started sending out more content about, you know, this is how you can get involved. These are the benefits, you know, here are some upcoming events you can get involved with whatever. And started hitting them with, with some of the reasons they joined in the first place to try and get them. And that dropped the churn rate by like 19%. Wow. They got 90% retainment on those customers for I think it was at least another six months. We've figured out in the end. , so that's not only, hey we've got all these customers for another six months, which is great.

# Transcript

Barry Moore: 27:48

We've got all that revenue but we, we don't have to spend a lot of time trying to find new customers now in constantly feed the machine cause we're keeping them there. And then the next step was to go back and try and tie in with, like I said, active campaign integrates with a lot of stuff. Try and tie in with their, with their membership software. You know, when they come for a class, they get ticked off in the class and it's like, well, someone hasn't been here for 10 days or whatever. That's a warning sign that they're starting to drop off. So, you know, they would get a special email if they hadn't been there within 10 days, to try and get them, bring them back in as well. So we really kind of focused on the customer care after the sale and it's always cheaper to retain customers and find new ones. So that was a pretty good result for those guys and they're pretty happy with that.

Ash Roy: 28:35

Awesome. Yeah, I think that's a great point. You know, it's not just about making the sale, it's about getting the customer or result that they first signed up for and that might actually be after sale service. I think a huge part of a successful business and ethical, successful business is making a promise, but then making sure the customer gets to the result. Now sometimes it's not possible if the customer doesn't take any action, but it is up to us as business owners to do whatever is in our power to try and get them as close to the result as we can. And active campaign helps to do that. Another statistic I've quoted in goodness knows how many episodes it costs between five and nine times more to acquire a new customer as it does to retain an existing one. So in terms of profit, it really helps your profitability dramatically if you are able to improve your retention rates because you're not spending all that money on acquiring the customer and you're creating goodwill for existing customers, which probably means you're going to get more word of mouth referrals and so on. So it's a win-win all around.

# Transcript

Barry Moore: 29:44

Yeah, exactly. Exactly that point, like not only, not only does it cost more to retain a customer, but there's, I mean, get a new customer than it does to retain one. But those ones that you retain, if you can give them the result that they came to you for in the first place, obviously there's an added benefit of they're going to talk to their friends about it. Hey, you know, we went to Ash and Ash was really great. Well kind of our podcast launch, it was pretty great. So you also got that kind of hard to measure word of mouth effect that goes on behind the scenes from happy customers as well. So, people ask me a lot of the time like, Oh, you know, where do I start with marketing automation? Because, you know, the great thing is it's a blank page and you can do whatever you want, but the bad thing is the blank page and you can do whatever you want, right?

Barry Moore: 30:23

If you've ever opened up a word doc and tried to write something that the worst part of it is that white page with is the blinking cursor and you're like, where do I start with this thing? Right? So, I always kind of, I always kind of try and start with onboarding customers because if you're getting customer, you're lucky enough to have customers that are paying you already really super important that you get them the result that they were after. So a good onboarding sequence, which is what happens, what goes out to that customer after they immediately after they've purchased, can do great things for them obviously, and it helped get them the result that they're after. But does great things for your business as well. It's like one, you're setting expectations with that customer, right? So which is going to lower refund rates and chargeback rates because, , you and the customer don't have this disparate expectation about what's going to happen, right?

# Transcript

Barry Moore: 31:14

So, Hey ash, thanks for signing up. Here's what's going to happen next. The first thing is we're going to do this. The second thing is we're going to do that sort of things. We're going to do that, right? If you need any help, here's where he'd go get it, right? So setting expectations, number one, it's very important, two how to get them. Let them know how to avoid common pitfalls with your product. If there are some, which is going to, it's going to help them obviously, but it's also going to lower support tickets to your help desk as well, which is going to be good for you. And then here's how you get a quick result, like in the next 24 hours. Ash, I want you to do this right. Once they've got a quick result, you know, hopefully, they're going to get addicted to that quick result and they're going to have more and more good results.

Barry Moore: 31:54

And then once they've got those good results, then they're going to start telling their friends about it and then you're going to follow up with them to make sure that they're happy with the product and then hopefully, maybe even, you know, I asked for a referral or review or something like that. So a good onboarding sequence, it's gold and I've got one year your listeners can download for free. It comes with free email, swipe files in and just fill in the blank, put it in tomorrow and you're ready to go. Literally, just copy and paste the link in there, put it in and your active campaign account and fill in the blanks and you're ready to go.

Ash Roy: 32:26

Perfect, well we will have that in the show notes, and the show notes will be available at [www.productiveinsights.com/active-campaign](http://www.productiveinsights.com/active-campaign). So that's great. That's awesome. So yeah, please do share that with me.

# Transcript

Barry Moore: [32:39](#)

And the other thing I wanted to circle back to, which we kind of touched on, but I want to make sure that we really hit this home is, so in that martial arts example, that martial arts academy example, you can use also use our marketing automation, not just to automate the messages to your customers for, to automate yourself. Right? So if you're one of my students at my academy and you don't come in for 10 days, yeah, I might send you an email, but it's probably more important than I send myself a notification. Says, hey, Ash. Ash has been a customer for six months and he hasn't been here in 10 days. What's going on? Maybe you just on holiday or whatever. Right? Right. But I'll get a message that says, hey, Ash hasn't been here in 10 days. That might trigger me to pick up the phone and call you and see, see what's going on. Or send you a personal email from my personal account, for example. But it's automating me and it's triggering me to follow up with those human touchpoints that are so important and maintaining customer loyalty as well. So it's not just about automating emails, it's also automating about the human touch points in your business and when those happen. Yeah.

Ash Roy: [33:40](#)

Now all this information and how to execute all this stuff is available in the active marketer academy. I would soon be an affiliate for the Active Marketer Academy as soon as Barry sets it up. So full disclosure, I will get a small amount of commission if you sign up through my link. But you can do that by going to [productiveinsights.com/Barry](https://productiveinsights.com/Barry), spelled B, A, double R, Y. I want to also say something about the onboarding sequences. There's some really good content that Ryan Deiss shared in episode 170 I think about how to quit onboarding sequences, or maybe it was [Richard Lindner](#) that shared it in [episode 171](#) that was an absolute masterclass on email marketing, particularly around measurement and improvement and testing and so on around email marketing, but [Ryan Deiss](#) talked about the five-step funnel so have a listen to both those episodes and you can listen to that at [productiveinsights.com/170](https://productiveinsights.com/170) and forward slash 171 respectively.

# Transcript

Ash Roy: [34:35](#)

Normally I talk about action steps at the end, but since we already started talking about it and let's touch on that. So the best action step our listeners can take from listening to this episode and the quickest win is let's not get too technical about this. I would just say grab a pen and paper and write down on that piece of paper. What things would you like to tell your audience in that onboarding sequence to start off with, don't worry about trying to create an active campaign. Don't worry about signing up with an active campaign account just yet. Just get clear on what you want to tell them so you're not looking at the blinking cursor when you do set it up on your computer. And the things that I do, and I'm going to improve on this, but things that I do is I do what is called bouncing them around my online assets. So I might send them a link to my youtube channel. I might send them a link to my podcast. I might ask them if they're interested in telling me a little bit more about themselves by clicking on certain links so I can tag them in the background and active campaign to know what their interests are so that I'm not spamming them as much. Is there anything else you think we should be talking about in the onboarding sequence, Barry?

Barry Moore: [35:42](#)

So everybody wants new sales or new sales are great, but I think it's much more important to take care of the people that have already bought from you. Right? Right. So onboarding sequences for those people who have just purchased from us. And, and as you said, writing down, you know, how can I, what's the, what's the best way I can get these people their results that they're after, right? They bought product x for me because they wanted to solve problem y, right? Yeah. So how can I help them get that result? And what are the steps, you know? Well, first I'm going to tell him what's going to happen to, I'm going to send them to where those assets honors or they can do that. Three, I'm going to check in with them after a week to make sure they're using the product where they're getting the results that they wanted.

# Transcript

Barry Moore: 36:23

If they're not, I'm going to, I'm going to maybe schedule a 10 minute call with him or whatever it's going to be. So what are those steps that I can, you know, hand on heart, what's the most I can do for that person to get the result that they want? So that's taken care of the customers that have purchased from us. And then those new people that are coming into my kind of sphere of influence, or I've just heard of me or just heard of the business or whatever. , how can I make them, how can I get a closer relationship with them? And that's typically called like an and an inductor and an indoctrination sequence or an introduction sequence. So, we're talking about, you know, this is who I am. This is what I do. This is why I do it. This is what benefits does.

Barry Moore: 37:03

It might, you know, this is how I can help you solve your particular problem that you've come here for. Or a lot of people, you know, there's, there's stages to where people are looking at so they, they might not even be solution aware yet. So they didn't, they're still defining the problem. They don't really have a clear idea of what their problem is. So we want to help him to find the problem. Once you've defined the problem, then we help to help them become solution aware. So yeah, I've got problem x, there might be 10 ways I can solve problem x. So what's the best solution to solve problem x? And then a bit about who you are and what you do and why you're doing it. Because ultimately people buy from people and they want to have the, as we talked about that know, like, and trust factor with those people that they they're working with or buying from.

# Transcript

Barry Moore: 37:44

So that introduction sequence or indoctrination sequence tries to build that know, like, and trust and make those people a problem aware and solution aware so that they, they know what the rent, that you're the right person to solve that problem for them. Okay. Now, what are the biggest challenges you've seen people face when it comes to getting started with marketing automation and what have you seen other best ways to overcome those challenges? Well, a couple of things. One is that we talked about where to get started, right? So I think the post-purchase onboarding sequence is probably the most important place to get started because you've already taken money from somebody. So turn to fulfill that promise to the best of your ability. So that's probably the most important thing I think where people struggle the most is there are so many things possible in so many different ways to build the mousetrap, so to speak, that they get them, it's called the paradox of choice, which in theory, you've heard it before, there are so many different ways to do it. You get overwhelmed with all the possibilities and he ended up doing nothing.

Barry Moore: 38:53

So that's the whole reason I kind of set up the academy in the active campaign training course in the first place, was to just show people what those first steps are. Because I was really excited about it too, you know, when I first came across the active campaign, it was when I was working on my partner's a fitness and wellness business. We were, we were, we wanted to move to marketing automation. And I put in ontraport. Again, I was one of those silly people who didn't really have any requirements and I just turned off. That part was good. So I put ontraport in here for a couple of months and I ripped it out. And because it was horrible. Yeah. Fence, ontraport, I'm sure you much better now. This was years ago. And then I put active campaign and I heard somebody else talking about active campaign, but then I loved it, like it was just so easy for me to figure out how this works like this, but there was no resources at all about how to use this.

# Transcript

Barry Moore: 39:44

I was looking for forums, I was looking for courses of forums to try and learn how to use this amazing tool and there were not, so I was like, oh wait, I can either, this product sucks. Why is no one talking about it either it sucks or it's really good and no one has discovered yet. Right. So it was really kind of the latter. No one had really kind of discovered it yet. Mainstream. So I had this idea that, oh, you know, I think it's great and I want to share that with other people. So I put together the first version of my course where this is going back maybe four or five years. Put it up on udemy. And it just went crazy. It's been the best second best selling active campaign training online forever. Thank you know, lucky for me.

Ash Roy: 40:25

Maybe it's the combat pilot checklist approach, but it's so beautifully structured

Barry Moore: 40:30

The whole reason I did it because I was so enthusiastic about this product and what was possible and I made all the mistakes and the beginning trying to figure out how to use it, you know, when into every little setting and every little thing and then I'm like, it was talking to other people, you know, other business owners that I knew face to face and I was like, you could do this and you can do this and you can do this. , but the thing was always people were always like, I don't know where to start and I don't know how to set it up. So it's like, you know, just because you go to the hardware store and you buy a bunch of wood in a bunch of nails and a bunch of tools, it does not mean you know how to build a birdhouse, right?

# Transcript

Barry Moore: 41:03

Like, so if you don't know the foundation and the blueprint that, you know, to hammer all this stuff together, it's not going to do you any good. The best tools in the world aren't going to do you any good if you don't know how to build it. Right. So the whole idea behind the course was here is a way to structure it and set the foundations properly so that you can put all this stuff into your business. And I like the quick win section you have because that helps you do exactly that. Yeah, exactly. Right. So, you know, there are stumbling blocks you're going to come across along the way. How do I integrate this with PayPal? Or how do I integrate this with thrivecart or whatever that is. So the quick wins stuff is designed to just kind of get done out of the way.

Barry Moore: 41:38

But the core active campaign training is really designed to take you from no idea, zero, to having a basic sales funnel that's working 24/7 in the background, just converting new customers across. So you know, I'm pretty proud of that. It's probably on the fourth iteration of that course the fourth time I've redone it. So I just recently went back to scratch and just wiped it out. And I don't know if you can see it, but I won't spin the camera around, but up on the wall there's like about a million posted notes and I'm like, how do we best structure this course? Right? But all the post-it notes up on, okay, this lesson and this lesson and this lesson and this lesson. So yeah, I'm pretty proud of that. People have responded very well to it. Active campaign has had me in to do, they'd run the study halls. Yes. So recently did a study hall with them in Perth to kind of do a masterclass with the participants in the study hall as well. So I talked to a lot of people and especially on new users to the product. So I've kind of incorporated that all into the training as well. So,

Ash Roy: 42:39

And you're the first person they actually authorized as a trainer in active campaign, is that right?

# Transcript

Barry Moore: [42:45](#)

Well, they have an active campaign certified consultant program, where you can get certified by them if you want to go out and do consulting with the product. And the, I was the very first number. Congratulations. But yeah, there are, you know, they're a great company. I've known the guys for years now. They're really kind of committed to putting these kinds of tools in the hands of small business owners. And as you said at the beginning, you know, infusionsoft, ontraport, those are always kind of been a, the per view of more established big business, big marketer type tools. You know, an active campaigns. Like, we want to take that automation and give it to, to anybody who wants to use it, which is cool.

Ash Roy: [43:22](#)

And the, and the prices accordingly. Modest, especially for people who are starting off.

Barry Moore: [43:28](#)

Well I don't want to blow sunshine up everybody, but it can become quite expensive once you're, but I mean if you've got 500 pounds with users, yeah. If you've got 500,000 users, you shouldn't be making some money. Right. So you know, at the upper end it becomes as expensive as new as other products, but we're differs from those lower other products is, as you said at the lower end. Like if you're just getting started and you've got a thousand contacts or maybe you have no mail enlist at all and he just starting to build your mailing list. Yeah, you can get it. You can get involved at a very reasonable price.

Ash Roy: [43:59](#)

I think it's \$9 us a month if you have 500 contacts or less

Barry Moore: [44:04](#)

I think they may have gone up recently. But yeah, it's, it's, it's in, you know, it's in there kind of chump change area.

# Transcript

Ash Roy: 44:10

Yeah you can go to the active campaign website and find out all the details. Okay, so we've talked about a whole ton of stuff, so I'm going to do a quick round up of what we talked about and then you can tell me if there's anything I missed and then we'll talk about how our listeners can find out more about you. We started off talking about what a sales funnel is and we demystified. We use the shoe analogy in a shoe store and explained the different kinds of shoes and all that sort of stuff, and we then started talking about how you can create tagging as opposed to creating separate lists, which ends up as a dumpster fire. You create tagging within your one list so you can talk intelligently to people depending on what their problem is and you'll solve their problem. In other words, you stay relevant.

Ash Roy: 44:57

This means you're less spammy. This helps to improve your deliverability. This means that you have better open rates, better conversion rates as in people click on your link, small. Within your emails. We talked a little bit about action tracking, which active campaign allows you to install on your website and that allows you to watch your customer's behavior on the website and then decide on what kind of content you can send them. We did a bit of a comparison between active campaign and Infusionsoft and ontraport and agreed that they all do good things but active campaign allows you to enter at a lower level the culture of the company. It seems to be quite small business friendly and allows people to enter it a low level and scales with you and it can still serve you at the top end as well so you don't have to rip out your active campaign when you reach a certain size and move across to one of the other guys.

# Transcript

Ash Roy: 45:49

The best software is the software that you use. I thought that was important. We talked about using automation, email marketing automation especially to do things like customer retention and to do post-sales service, which is a very important part of getting your customer the result that they signed up for. It's not just about making the sale, it's about looking after the people who are already there with you, who've taken a risk with you by giving you their money and getting them to a result. It's about improving the user experience and by improving the user's interaction with your product so they are more likely to get to the result and tell their friends about it rather than just sales, sales, sales, sales, sales, and just cramming as many people as possible into the top of your funnel. You're trying to serve them at all parts of your funnel. And then we talked a bit about how to get started, quick wins and the biggest challenges and how to solve those challenges. Is there anything else you'd like to add?

Barry Moore: 46:49

Oh, I would just like to reiterate the point of, you know, it's not just about automating all of the messages to your customer. It's all smart automated messages to yourself. Oh yes. So yes, you can have those touch points with your customer. You know, knowing when to call your customer, you know when to follow up with your customer, especially in a subscription type business. It's very important.

Ash Roy: 47:08

Yeah, I'll make a note of that actually.

Barry Moore: 47:09

Certainly automating the human touch points is a point that a lot of people overlook when it comes to marketing automation.

# Transcript

Ash Roy: 47:16

Yeah, and a great way to think about it really is just try and imagine how you would sell to your customer if you were an actual physical store and then replicate that experience in your automation as much as possible. And if that means using a video to introduce yourself when they first sign up, do that.

Barry Moore: 47:33

Yeah, absolutely. And you know, you can do, you can get really clever stuff like you know, someone pops over a certain, you know, they're buying multiple products. For example, if someone pops over a certain sales level, hey, this person's just bought over \$5,000 worth of product and customer lifetime value is going over \$5,000 hey Barry, pick up the phone and call this kind of thinking personally or send them a little gift or whatever. Right? So that you're, you're constantly rewarding the customer behavior and your business that you were on the award and you're making sure that no, if it's all automated, you making sure that nobody slips between the cracks, you know?

Ash Roy: 48:05 "

Yeah. And there are great tools like Bonjoro or Dubb that allow you to create these personalized videos very quickly and then you can even watch whether they've seen it or how much of the video they've seen. And so if they haven't watched it, you can potentially and so on without being too much of a pain. So, Barry, how do people get more of the active marketer goodness?

# Transcript

Barry Moore: [48:28](#)

Well I would say if you're interested, you know, I focused mostly on active campaign almost exclusively just because I can, and we were like. If you want to find out more, you go to the [activemarketer.com](http://activemarketer.com). And I would say, hey, sign up for a trial account of active campaign doesn't cost you anything. You get to play with it for a little while and see how it works. If you, if you do like it, like I said, I'm a very popular active campaign training course. It shows you how to use the tool and then we have a Facebook group. So for ongoing support for those people, I think there's over, there's definitely over 8,000 people in that Facebook group now so it's called automation nation. So join us in the Facebook group. If you have questions or comments or where you just want to learn how to more about marketing automation, you can join us in there. But if you go over [www.theactivemarketer.com](http://www.theactivemarketer.com) there'll be some links to the training, and for productive insights listeners, if you want to buy the training, I'll offer you 20% discount with the coupon code productive, we'll get you 20% off the course.

Ash Roy: [49:27](#)

Thank you very, that's very kind my listeners and I really appreciate it. It was awesome to have you on the show. I really look forward to having a back on, I can see this turning into a really useful series. We'll talk about tagging and we'll talk about a whole lot of other things. Probably a little bit technical, but if you need any help in demystifying any of this stuff, you can always reach out to me through my email, which is [ash@productiveinsights.com](mailto:ash@productiveinsights.com)

Barry Moore: [49:52](#)

Well, thanks for having me on Ash. I know my partner is tired of hearing me talk about this stuff. It's good. I can talk to somebody else about it because I'll talk about it all day long.



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