Email Setup - Kit

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Function: Process

Description:

How to use the email automation app, Kit.

Guideline:

Here are the components of the system:

1) **Subscribers**: They are the people we serve. We add them using a CSV file or they add themselves by signing up on a form on a website or landing page.

2) **Custom Fields**: Add custom fields. You can add or remove field values based on the actions a subscriber takes. Such as signing up for a lead offer or making a payment.

3) **Forms**: Subscribers will enter their details in a form on a website or landing page. Their details will go into the system.

4) **Sequences**: This has at least one automated pre-written email. Set it to send a free offer, nurture new subscribers or onboard new clients.

5) **Broadcasts**: These are one off emails sent to a segment. Such as a weekly email newsletter. You can schedule them in advance at a specific date and time.

6) **Automations**: It starts with a trigger, followed by a series of automated actions. You can see the journey of your subscriber.

Notes:

- Use your custom domain name instead of your free email address.
- Use a virtual address or an office address instead of your home address.
- Kit allows you to use their address so you don't have to get a virtual address.
- Use custom fields instead of tags. (It's hard to manage many tags.)
- Import subscribers with tags and custom fields. (Importing Subscribers)
- Personalization by showing different content based on custom fields. (Conditional Content)
- Pruning and reactivating cold subscribers. (Pruning Cold Subscribers)
- Export your subscribers and save it as a backup once a month. (Exporting Subscribers)

If you have questions about Kit, email their support team at support@kit.com.

Benefits:

This will ensure that you get to what you need to do without clicking around.

Importing Subscribers

If you're about to import email addresses and you've not contacted them for 3 months or more, you need to verify them. Especially for company email addresses, when people leave their jobs, the company will delete their email addresses.

If you're sending emails to email addresses that no longer exist, the bounce rates will be higher and it will affect your email deliverability rate.

It'll also mess up your data and give you the wrong numbers, which will cause you to make wrong decisions in your email marketing.

Before you import, validate your email addresses with ZeroBounce, UseBouncer or NeverBounce. You only need to pay for what you use instead of paying for subscription fees. After you're done, you won't have to waste your time on invalid emails and you'll have emails that are still in use.

If you've not contacted them for a month or more, send them an email telling them what content you'll be sending them, the frequency and days you'll send emails. Also, let them know they can unsubscribe if they're no longer interested.

Now, you'll have only the people who might be interested in your content and your offers.

Settings

Click on profile, click on **Account Settings**, click on **Email**.

1) Add **From Address**. (Add and confirm.)
2) Edit **Default Time to Send Emails**. (Choose a time and timezone.)
3) Add **Address**. (Use company address.)
4) On **Advanced**, check Add subscriber_id parameter in email links.

Go to general account settings. Add your brand colors.

Templates

Go to the Send tab, click on **Email Templates**.
Click on the template you want to edit.

[Add your super email signature here.]

Want to change how you receive these emails?
Unsubscribe | Update Your Email Address
[Add an address here.]

Do not use your home address!
Use Kit's address if you don't have a virtual address.

Segments

Go to the **Grow** tab. Click **Subscribers**.

Cold: The ones who did not click on any links for 60 days.
Click Create a Segment. Name it **Cold**.
Matching: All. Click Add Filter.
Select **Cold Subscribers**.
Click Add Filter. Click Save.

Program 1: The clients who completed the onboarding.
Click Create a Segment. Name it **Program_1**.
Matching: All. Click Add Filter.
Custom field, **Onboard_Program_1**, Is Exactly, **Onboard_Completed**.
Click Add Filter. Click Save.

Program 2: The clients who completed the onboarding.
Click Create a Segment. Name it **Program_2**.
Matching: All. Click Add Filter.
Custom field, **Onboard_Program_2**, Is Exactly, **Onboard_Completed**.
Click Add Filter. Click Save.

Subscribers: The ones who completed the nurture sequence.
Click Create a Segment. Name it **Subscribers**.
Matching: All. Click Add Filter.
Custom field, **Nurture Newsletter**, Is Exactly, **Nurture_Completed**.
Click Add Filter. Click Save.

Conditional

Send personalized content for each segment. Paste the following liquid code in the email copy.

{% if subscriber.custom_field contains "Onboarding" %}
{% if subscriber.custom_field contains "Onboarding_Completed" %}
This will show if the subscriber is a current or past client.
{% else %}
This will show if the subscriber is not a client yet.
{% endif %}

Fields

Go to the **Grow** tab. Click **Subscribers**.
Click any **Subscriber's Name**.
Click **Add a new field**.
Enter **Field name**.
Click and **Update Subscriber**.

Custom Fields	**Field Values**
Discovery Call	Call Discovery Booked Call Discovery Completed
Leads - [Category] - [Name]	Requested Viewed
Nurture Newsletter	Nurture Nurture Completed
Offer - Program 1	Onboarding Onboarding Completed
Offer - Program 2	Onboarding Onboarding Completed
Offer - Program 3	Onboarding Onboarding Completed
Segment - Subscriber Goal	Goal 1 Goal 2 Goal 3
Segment - Subscriber Level	Level 1 Level 2 Level 3
Segment - Subscriber Preference	Preference 1 Preference 2 Preference 3

[Category] = Challenge, eBook, Quiz, Video, Content or Updates

Forms

Go to the **Grow** tab. Click **Landing Page & Form Signups**. (Duplicate an existing form to edit.)
Go to the **Forms** tab, click **New Form**, select **Form**.
Select **Inline** format. Choose a template, Mills form.

Click **Settings**.

General: Select **Redirect to an external page**.	Add thank you page URL.
Incentive: Select **Send incentive email**.	Add confirmation page URL. Edit email content.
Advanced: Select **Show custom content**.	You're already a subscriber.

When you choose to **send incentive emails**:
Subscribers must open a confirmation email and click on a link then they can get the emails.

Confirmation Email:

After you click on the confirmation link, you'll receive the email with the information you requested for.

If you think that this was a mistake or you've changed your mind, you can ignore this message. You won't get anymore emails and the system will delete your information.

Design

Custom CSS:
.formkit-header {font-family: Oswald-Bold; margin: 0 0 10px 0 !important}
.formkit-header > h2 {margin: 0 auto !important}
.formkit-subheader {font-family: Oswald; margin: 0 auto !important}
.formkit-subheader > p {margin: 0 auto !important}
.formkit-fields {font-family: Nunito; margin: 0 auto !important}
.formkit-submit {font-family: Nunito; font-size: 18px !important}
.formkit-submit:hover {font-family: Nunito; background: #808080 !important}
.formkit-guarantee {line-height: 1.5em !important}

Fonts:
Replace Oswald-Bold with your H1 font.
Replace Oswald with your H2 font.
Replace Nunito with your body font.

Edit background color, border radius and background transparency.
Click on the header. Edit the header text, font size, font color and font weight.
Click on the subheader. Edit the subheader text, font size and font color.
Click on the fields. Edit the font color, border color, border radius and font weight.
Click on the submit button. Edit the text, font color, background color, border radius and font weight.
Click on the guarantee. Paste the paragraph, edit the font color, font size and font weight.

Add this paragraph below the button:
[Website Name] is committed to protecting your privacy.
Your email will never be disclosed to anyone.
There is an unsubscribe link at the bottom of every email.
You can unsubscribe anytime by clicking on the link.
Privacy Policy (Add link)

Click **Built with Kit**.
Uncheck the "Built with Kit" badge.
Click **Save**.

Sequences

Go to the **Send** tab. Click **Sequences**.
Click **New sequence**. Give it the same name as the custom field.

Click **Add Email**.
Edit Email. Add the subject line. Enter the preview text. Add the email body copy.
Send this email: Select when to send it. (Most of the time, it's 23 hours.)

Click **Email**. Click **Send Preview**. (Send it to a Gmail email address.)
Have a quick look to make sure everything is alright.
Check if all links are correct. [**Important Step**!!!]

Status: Select Active after it's done.
Click **Save All**.
Click **Add Email**. (Repeat the same steps for all emails in the sequence.)

Broadcasts

Go to the **Send** tab. Click **Broadcasts**.
Paste the subject line and body copy.
Click **Preview**. Click **Send Test Email**. (Send it to a Gmail email address.)

Have a quick look to make sure everything is alright.
Check if all links are correct. [**Important Step**!!!]
Click **Close Preview**. Click **Continue**.

Select **From address**.
Select your subscribers.
Matching: **all**. Click **Add Filter**.
Select **Within Segment**. Select **Broadcast**. Click **Add Filter**.

Choose your send date and time.
Click **Advanced options**. Enter **Preview Text**. (150 Characters.)
Click **Continue**.

Check **Sending from**, **Sending to** and **Your Broadcast**.
Edit if there are errors. If there are no errors, go to the next step.
Click **Schedule Broadcast**.

Personalization

Display first name if you have it and display 'hey' if you don't have the first name:
Hey{% if subscriber.first_name != null %} {{ subscriber.first_name | downcase | capitalize }}{% endif %}

Automations

Go to the **Automate** tab.
Click **Visual Automations**.
Click **New Automation**.

Call Booked:
Joins a form: Select **Call_Booked**. Click **Add Event**.
Action: Click Set custom field.
Select **Call**. Enter **Call_Booked**. Click **Add Action**.

Call Completed:
Joins a form: Select **Call_Completed**. Click **Add Event**.
Action: Click Set custom field.
Select **Call**. Enter **Call_Completed**. Click **Add Action**.

Leads:
Joins a form: Select **Leads**. Click **Add Event**.
Action: Click Set custom field.
Select **Leads**. Enter **Requested**. Click **Add Action**.
Action: Email Sequence.
Select **Leads**. Click **Add Action**.
Condition: Custom Field. (Yes/No.)
Has a custom field, **Nurture_Newsletter** that contains **Nurture**. (No)
Condition: Custom Field. (Yes/No.)
Has a custom field, **Nurture_Newsletter** that contains **Nurture_Completed**. (No)
Action: Click Set custom field.
Select **Nurture_Newsletter**. Enter **Nurture**. Click **Add Action**.

Nurture:
Joins a form: Select **Nurture_Newsletter**. Click **Add Event**.
Action: Click Set custom field.
Event: When the custom field, **Nurture_Newsletter** changes to **Nurture**.
Select **Nurture_Newsletter**. Enter **Nurture**. Click **Add Action**.
Action: Email Sequence.
Select **Nurture**. Click **Add Action**.
Action: Click Set custom field.
Select **Nurture_Newsletter**. Enter **Nurture_Completed**. Click **Add Action**.

Onboard:
Joins a form: Select **Onboard_Program**. Click **Add Event**.
Action: Click Set custom field.
Select **Onboard_Program**. Enter **Onboard**. Click **Add Action**.
Action: Email Sequence.
Select **Onboard_Program**. Click **Add Action**.
Action: Click Set custom field.
Select **Onboard_Program**. Enter **Onboard_Completed**. Click **Add Action**.