

The Automate Screen

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How to Set Up a Welcome Program

One of the most powerful tools in your email arsenal is a welcome program. It not only provides your customers with a confirmation of their subscription to your email program but it also helps nurture them as a subscriber so they will be more engaged in your email program.

The following guide will help instruct you on how to set up a successful Welcome Program.

1. Tips for your Message

Tips for your Message

The first step you want to take in setting up your welcome program is mapping out the messages you will be sending to your audience. This includes deciding which messages to send and the duration between each message.

There is no magic formula to these wait times so it's always a good idea to perform plenty of tests. The first message is the most important stage in your program as it welcomes new subscribers to your email program. When creating the content for this message, it's important to think about the following tips:

- **Keep it relational** - This is the first time you will be sending a message to your new subscriber and it is important you do not bombard them with promotional offers. If you do, they will expect all email messages afterward to do the same and might regret signing up to your email program. Create a message that is friendly and welcomes them to the program. Using their first name in the email and adding a signature at the bottom is always a nice touch. Feel free to add in a small promotional offer (ie. A special offer for new subscribers) but it should not be the main focus of the email.
- **Make it easy to unsubscribe** - This goes for any email message you send but it is very important to make sure it is easy for a subscriber to unsubscribe from your email program at any time. This means making it easy for them to find where to unsubscribe and making the process easy (Max. 2 clicks).

- **Become friends** - Encourage your new subscribers to add your sending address to their address book. This will help ensure you always make it into their Inbox and not their Junk folder.
- **Set the expectations** - Let your new subscribers know what they can expect from your email program. In other words, let them know how often you will be sending to them and what kind of content they can expect to receive. This should be done in the subscribe form as well.

The other messages you set up in your welcome program can contain any content you feel your customers should or would want to receive next. These messages could inform them of your other products/services and entice an up-sell/cross-sell or they could inform them of other value-added services you offer as a company and help build your customer rapport.

2. Setting Up the Web Form

Setting up the web form

The web form to collect subscribers should indicate what they will be signing up for and try to keep the number of required fields you ask for to a minimum.

Asking for too much information on your web form can result in an increased form abandonment rate as customers do not want to fill out an extensive form just to receive your monthly newsletter.

The type of information you ask for can also impact form abandonment. Sensitive information like phone numbers can have an impact regardless of form length.

However, the greater the benefit of your email program, and the higher the level of trust for your brand, the more willing your subscribers will be to fill out additional information.

A good place to start is to consider the information that will be most helpful for future targeting and messaging needs then keep to collecting only the most important information.

It is a good idea to test your web form with different amounts and types of fields so that you can measure and determine the most effective treatment.

For additional instructions on how to set up a web form in CONNECT, [click here](#).

3. Creating a Segment

Creating a segment

In order to capture new subscribers in your Welcome program, you will need to create a segment to use in your AutoProgram. In this case, you will want to click and drag the "List Upload" Source into the Segment definition and find your Web Form name in the drop down.

Note: If you select an existing web form, keep in mind, it will target all submissions that have been collected since the form was created. In order to prevent this, [export the segment](#) you just created above using the "Save and Export as .csv" button at the top.

Then, [upload this list](#) back into UMPIRE which will create a source for use in segmentation.

Finally, add a "List Upload" source as part of an [AND statement](#) in your segment, change "Equals" to "Does not equal" and select the list that was just uploaded.

This will create a segment that will only target new subscribers moving forward.

3. Setting up the AutoProgram

Setting up the AutoProgram

The final step in setting up your Welcome program is to Automate the process.

This will allow your Welcome program to automatically deploy and track each new subscriber and which message they should receive next.

For additional instructions on how to set up your welcome AutoProgram, [click here](#).

How to Set Up an AutoProgram

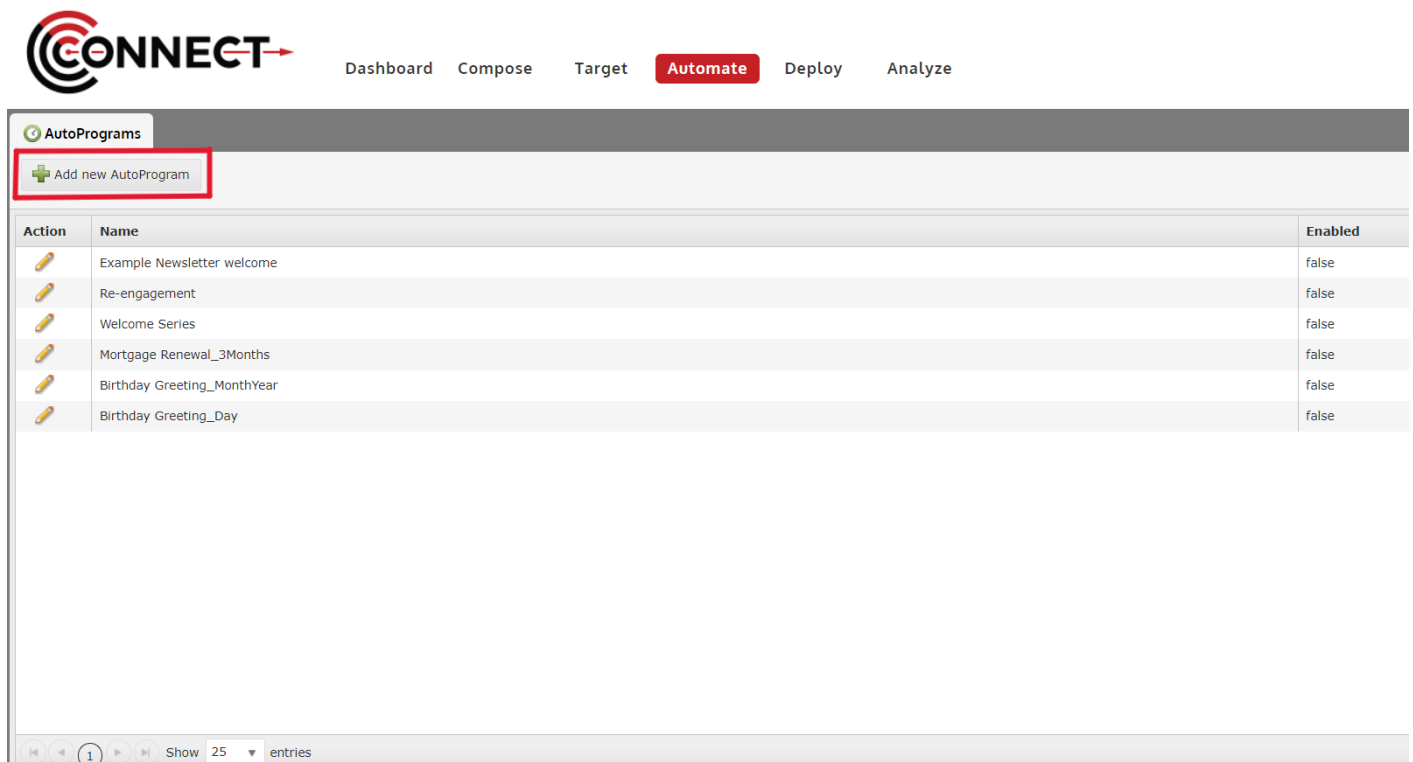
AutoPrograms allow you to set up a predetermined "stream" of messages for your records to complete.

In these programs, you choose a segment, so that the program knows who to target and a Subscription so that the program knows who to exclude based on their subscribe/unsubscribe status.

You can also tell this program how long to wait in between each message and if you would like the records to complete the program once or repeatedly go through the program.

Below are the instructions on how to set up an AutoProgram.

1. Click "Create new AutoProgram" on the Automate Tab



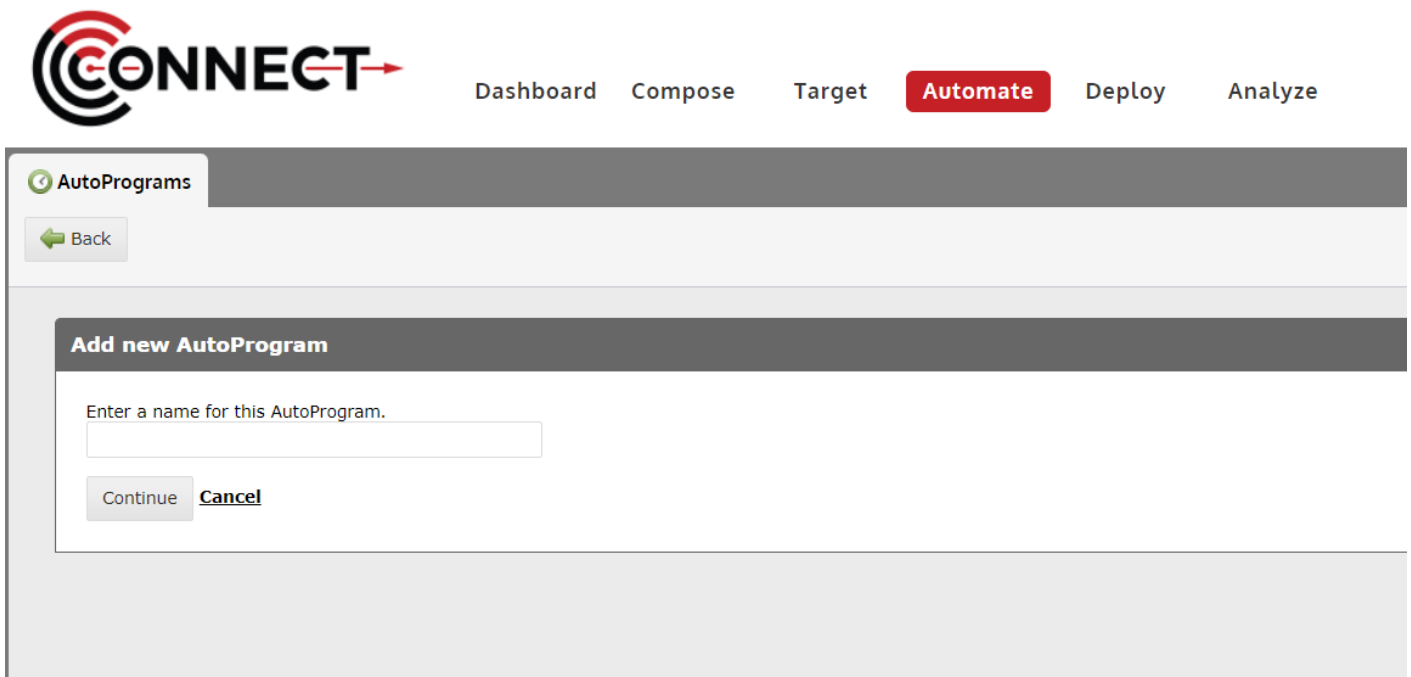
The screenshot shows the CONNECT dashboard with the Automate tab selected. The 'Add new AutoProgram' button is highlighted with a red box. Below the button is a table of existing AutoPrograms.

Action	Name	Enabled
	Example Newsletter welcome	false
	Re-engagement	false
	Welcome Series	false
	Mortgage Renewal_3Months	false
	Birthday Greeting_MonthYear	false
	Birthday Greeting_Day	false

At the bottom of the dashboard, there is a pagination bar showing '1' entries and a 'Show 25 entries' dropdown.

1. Click Automate Tab
2. Click Add New AutoProgram

2. Type in the name for your AutoProgram and click Continue








The screenshot displays the CC-CONNECT web application interface. At the top, the logo 'CC-CONNECT' is on the left, and a navigation bar contains the links: 'Dashboard', 'Compose', 'Target', 'Automate' (highlighted in a red box), 'Deploy', and 'Analyze'. Below the navigation bar, a dark grey header bar shows 'AutoPrograms' with a green circular icon. Underneath this, a light grey bar contains a 'Back' button with a left-pointing arrow. The main content area features a dark grey header for the 'Add new AutoProgram' form. Inside the form, there is a text input field with the placeholder text 'Enter a name for this AutoProgram.' Below the input field are two buttons: 'Continue' and 'Cancel'.

3. Click "Edit" next to the newly created AutoProgram



AutoPrograms

+ Add new AutoProgram

Action	Name	Enabled
	Example Newsletter welcome	false
	Re-engagement	false
	Welcome Series	false
	Mortgage Renewal_3Months	false
	Birthday Greeting_MonthYear	false
	Birthday Greeting_Day	false

4. Select the Subscription you wish to send against



AutoPrograms

← Back

Save AutoProgram

Save & ReSync

Program name:

Program status ☐ Enabled ☒ Disabled

Program steps

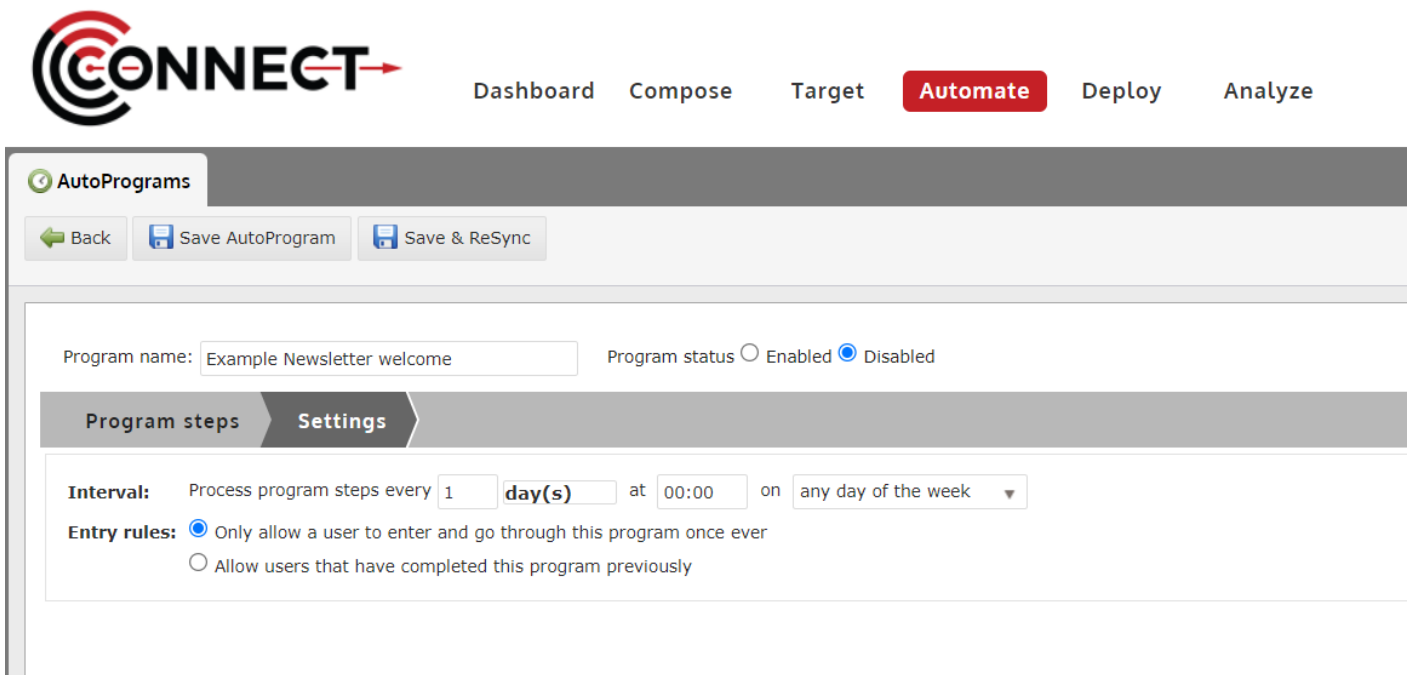
Settings

Subscription:

Target audience: People who

- **Alert:** DO NOT ENABLE YOUR AUTOPROGRAM UNTIL FINISHED. See the final step of this tutorial for details.
- **Note:** Any records that have Unsubscribed from the chosen subscription will not be included in the program.

5. Switch to the "Settings" tab, Set the Program Run Interval



The screenshot shows the CONNECT Automate interface. At the top, there's a navigation bar with links: Dashboard, Compose, Target, Automate (highlighted in red), Deploy, and Analyze. Below this is the 'AutoPrograms' section. It includes buttons for 'Back', 'Save AutoProgram', and 'Save & ReSync'. The main area shows the 'Program name' as 'Example Newsletter welcome' and 'Program status' as 'Disabled' (selected). Below this is a tabbed interface with 'Program steps' and 'Settings' (selected). The 'Settings' tab contains the 'Interval' section, which says 'Process program steps every 1 day(s) at 00:00 on any day of the week'. Below the interval is the 'Entry rules' section with two radio buttons: 'Only allow a user to enter and go through this program once ever' (selected) and 'Allow users that have completed this program previously'.

This interval determines how often the AutoProgram will process the steps. In other words, it tells your AutoProgram how often you would like it to go through each step of the program and determine which records receive messages and which records are waiting.

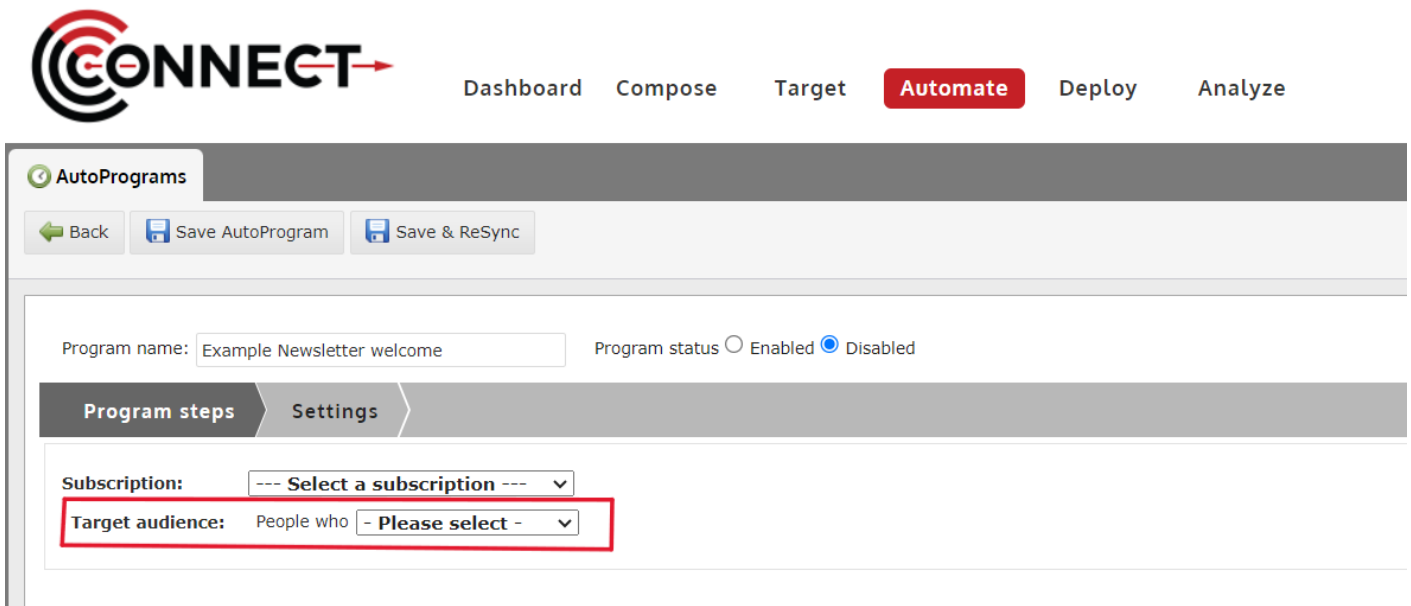
This is very important as it greatly effects your "wait periods" in the next steps of this tutorial.

Set if you would like records to go through the program once or repeatedly

- **Only allow a user to enter and go through this program once ever**
 - This specifies that you would like each record that enters the AutoProgram, to only go through the program once and only once.
- **Allow users that have completed this program previously**

- This specifies that you are allowing each record that enters the AutoProgram, to repeat the program if they still fit the "Target Audience".

6. Select the Segment or List File you wish to use as your target for the AutoProgram



The screenshot shows the CONNECT interface with the 'Automate' tab selected. Under 'AutoPrograms', there are buttons for 'Back', 'Save AutoProgram', and 'Save & ReSync'. The 'Program name' is 'Example Newsletter welcome' and the 'Program status' is 'Disabled'. The 'Program steps' and 'Settings' tabs are visible. In the 'Settings' tab, the 'Subscription' dropdown is set to '--- Select a subscription ---'. The 'Target audience' dropdown is highlighted with a red box and shows 'People who' followed by '- Please select -'.

- Go back, and Click **Program Steps**
- Select the Target Audience, **either it is in the file or in the segment**
- Click **Select a Source**

7. Click Add another action to insert the first action the program will perform

8. Select either "Send the email" or "Wait For" as your first action.

- **Send the email**

- This will send the selected Message to the selected Target audience, when the program runs.
- If you choose "Send the email" as your first step, any new records that become part of the Target Audience, will receive the selected message first.

- **Wait For**

- This will trigger a wait period. Generally, wait steps are used for in between messages, however, if you use it as your first step, you are indicating you would like the program to wait the indicated number of time when the program runs.
 - Therefore, if you set your program to run every 1 day(s) at 10:00AM, it will begin the indicated "wait period" when the program runs at 10:00AM.
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9. Click "Add another action" if you wish to continue to add additional steps to your AutoProgram

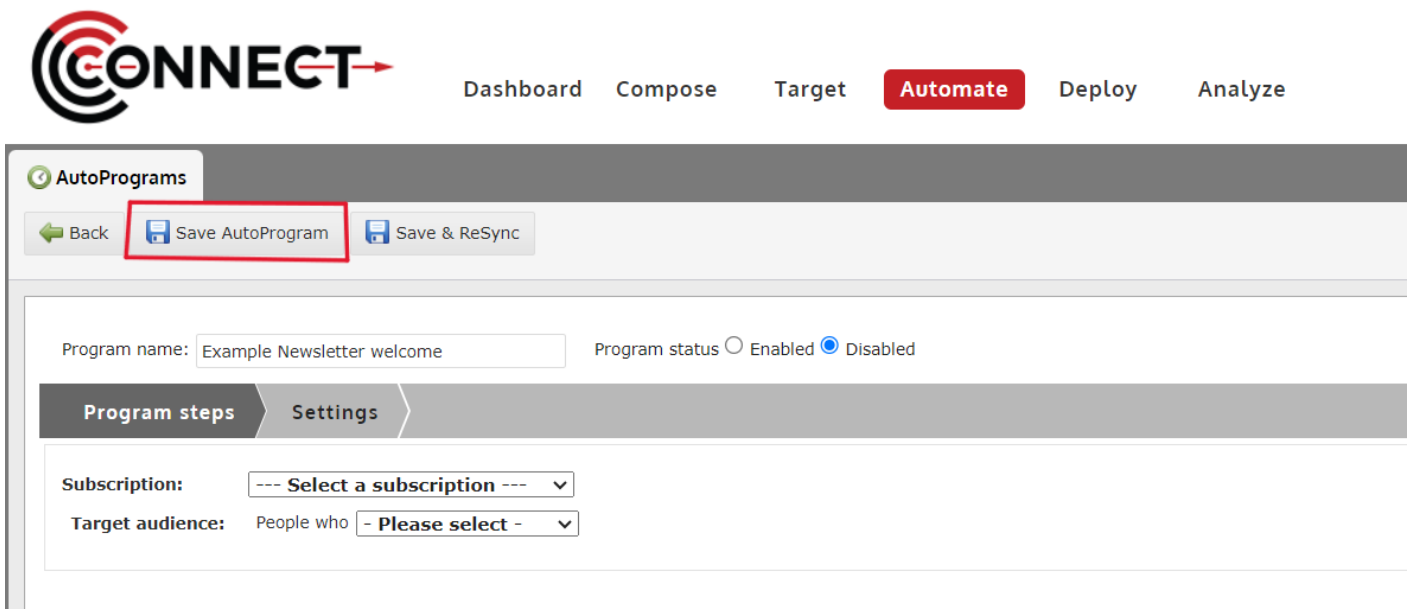
Note: If a wait period is placed after a message, the wait period begins as soon as the message is sent.

Example:

- The program is set up as "Send the email, Wait for 2 days, Send the email" and it is set to run every 1 day(s) at 10:00AM.
- Each record that enters the program will receive the first message immediately at 10:00AM when the program runs.
- This message also triggers the wait period after it. Then the next day, the program would run at 10:00AM again.

- However, since there is a wait period of 2 days, the program reads that the record that received the first message is in a state of "waiting".
- The 3rd time the program runs at 10:00AM, the wait period has been finished and the next email will be sent.

10. Enabling your AutoProgram, Click "Save AutoProgram" once finished



The screenshot shows the CCConnect dashboard with the following elements:

- Header:** CCCONNECT logo and navigation links: Dashboard, Compose, Target, **Automate** (highlighted in red), Deploy, Analyze.
- Section Header:** AutoPrograms
- Buttons:** Back, **Save AutoProgram** (highlighted with a red box), Save & ReSync.
- Form Fields:**
 - Program name: Example Newsletter welcome
 - Program status: ☐ Enabled ☒ Disabled
- Tabs:** Program steps, Settings (active)
- Subscription:** --- Select a subscription ---
- Target audience:** People who - Please select -

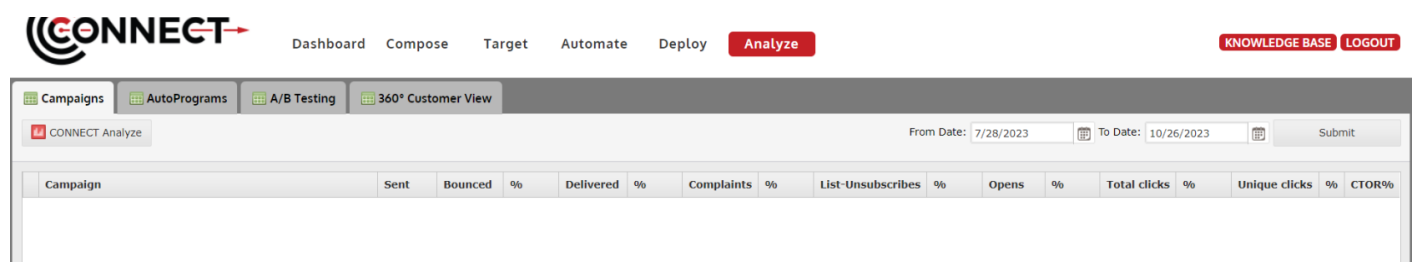
How to View Reporting on AutoPrograms

With AutoPrograms, you have access to two levels of reporting. The first is the main reporting platform that you navigate to by clicking the "Go to reporting" button on the Analyze tab.

The second is a new tab under the Analyze tab called "Auto Programs". This tab will show you each of your AutoPrograms and the messages that are assigned to them (assuming they've been sent to at least 1 recipient).

Below is instructions on how to find AutoProgram reporting and a description of the different reporting aspects of AutoPrograms.

1. Navigate to the Analyze tab and click on the Auto Programs tab



2. Auto Programs

	AutoProgram name	Message name	Step	Sent	Bounced	%	Delivered	%	Complaints	%	List-Unsubscribes	%	Opens	%	Total clicks	%	Unique clicks	%	CTOR%
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1. **AutoProgram Name** - This indicates the name of the AutoProgram, the version of the AutoProgram that is being reported on, and the number of message steps underneath that program.
2. **Message Name** - This indicates the name of the message that was sent at the specific step(3).
3. **Step** - This indicates which step each message is assigned to. Note: Wait periods are considered a step as well but are not reported on.
4. **Sent Count** - This metric and all other adjacent metrics are a sum total of all recipients that have been sent the adjacent message in the AutoProgram being reported on.