

# 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.

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## 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.

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## 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](#).

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## 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.

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## 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](#).

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