



## MARKETING HOT SHEET 2

Email Marketing Software Set Up



**My aim with the More Clients Academy is to get more clients coming to you consistently.**

There is one tool in my business that I simply could not be without and I know it could or should be the same for your business too.

This tool is my email marketing software, which allows me to automate and leverage my marketing to such a level of success that I estimate it is responsible for 80% of my business income.

80% of my new business income all from a good old email list.

Whilst everyone out there in the marketing world is always trying to ‘sell you’ their new fangled marketing tool, I stick to what has and always will work: ‘easy life marketing’.

Nothing fits this bill more than Email marketing.

In this Marketing Hot Sheet, I show you, step by step, how to set up your email marketing the easy way.

If you haven't yet signed up for Aweber, you can do so here:

[Click here to sign up to Aweber:>>](#)

Please don't skip a part. I have put it together in the most logical order possible and all of the parts are required to get you up and running in a way that makes the best use of this automated and leveraged marketing tool.

Shall we begin?

## Step 1 – Basic Set Up

This is where you set up the basics of your email marketing database.

The screenshot shows a registration form titled "Welcome! Let's quickly set up your account." with "Step 1/3" in the top right. The form contains the following fields and options:

- Company name:** A text input field with the placeholder "Your Company Name", marked with a large orange "1".
- Do you have a website? \***: A radio button selection with two options:
  - Yes! Here's the address.:** Selected with a radio button, marked with a large orange "2". Below it is a text input field with the placeholder "https://www.yourdomainname.co.uk".
  - No, I don't have a website.:** An unselected radio button option.
- Contact address \* ?**: A radio button selection with two options:
  - Use a different address.:** Selected with a radio button, marked with a large orange "3".
  - Use a different address.:** An unselected radio button option.
- Email "from" name \*:** A text input field with the placeholder "Your Name", marked with a large orange "4".
- Email "reply to" address \*:** A text input field with the placeholder "youremail@yourdomainname.co.uk", marked with a large orange "5".

A blue "Next" button is located at the bottom right of the form.

1. Your business name. This is how you want people to see it when ever it is displayed, so ensure that you enter it correctly.
2. Your website URL.
3. Your contact address will be pulled through from your billing. If you need to use a different address, this is your chance to change it.
4. This is how you would like your name to be displayed to your email recipients – for me it would be 'Nick Jervis'.
5. This is the reply address that responses to your emails will come to. Should this not be yours or your Personal Assistant's if you have one and are happy for him or her to manage these emails. Personally, mine come to me as I like to see what my prospects are saying.

## Name and describe your list Step 2/3

A list is a group of subscribers who have given you permission to send them broadcasts (one-time messages and newsletters) or campaigns (automated series of messages) via email. Think of it as a group of people or contacts with common interests who want to hear from you. **Don't worry! You can change and edit all of this information in the future if you need to, inside your account.**

List Name \*

1 (Example) Weekly low fat recipes

List Description \* ? 0/400

2 (Example) Healthy low fat recipes for every budget sent weekly!

Go back
Next

1. Over the years I have developed a system that works for me which I am happy to share with you. The reason that I have done this is that the List Name must be unique across **ALL of Awebers' clients**. I use my business initials followed by a descriptive name for me to remember so it might be *npj-more-clients-academy*. I always use lower case just because that was what I was trained to do when coding websites back but you do not have to.
  
2. This can be seen by your recipients, so ensure you add a value of them signing up to this list here rather than simply saying 'My Monthly Emails'. Instead, for a Nurture List you might put here '**Free Guide To YOUR SERVICE**' or for a Now List you might put '**Saving clients time and money with our XXX advice**'. Think of the benefit to your client in parting with their email address and you won't go far wrong here.

### Approve your confirmation message Step 3/3

A list is a group of subscribers who have given you permission to send them broadcasts (one-time messages and newsletters) or campaigns (automated series of messages) via email. Think of it as a group of people or contacts with common interests who want to hear from you.

**Language**  
Choose a language for pre-approved subject lines and default message content.

English ▾

**Subject line**  
Choose an approved subject line or request a custom one. This is your current subject line.

Confirm your subscription. ▾ **1**

[Request a custom subject line](#)

**Message preview**  
This is the confirmation message your subscribers will receive when they sign up for your list.

Please click the button below to confirm that you'd like to receive email from {!listname}.

**Confirm my subscription** **3**

Thank you!  
{!company\_name}

[Edit message content](#)

Go back
**4** Complete setup

**This section does require some adjusting.** If you leave it as Aweber intended, hardly anyone will add themselves to your list in the future.

What you are preparing here is the very first email that your clients receive from you when you add them to your database.

It is even more important than that in that Aweber has always been double opt in – which is great from a GDPR perspective – in that users have to do the following to go onto your email marketing list:

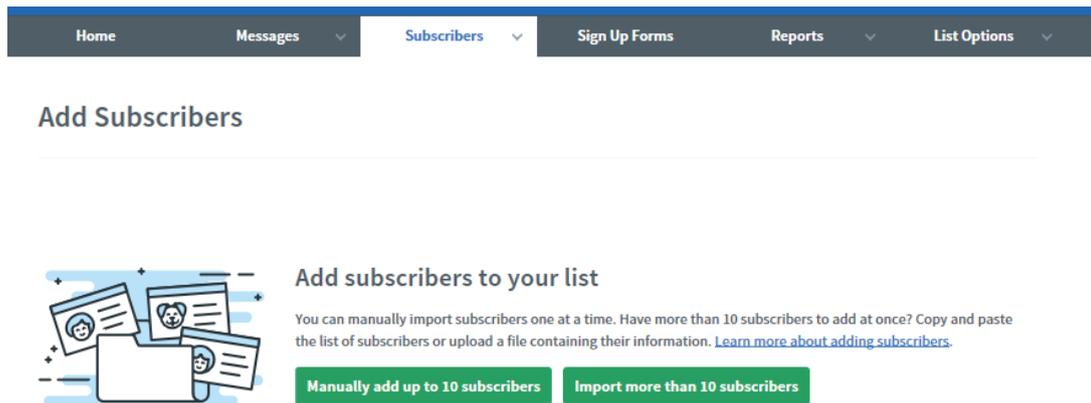
1. Ask to go onto your list (either on the telephone or on a form on your website); and
2. Click the link in this email to get onto your list.

Hopefully that explains why this needs a little bit of attention. So, onto each numbered point.

1. ‘Subscription’ is a dreadful word in marketing terms. It screams *‘money’* and *‘they’re going to sell to me’*. This is not what you want your clients to be thinking. I have used the same wording for years. Click on [Request a custom subject line](#) and enter this: *‘Response required. Please confirm your email address.’*

2. To encourage as many people as possible to click this link, change the wording to *'Please click the button below to confirm your email address:'*
3. Change from *'Confirm my subscription'* to *'Confirm my email'*.
4. Click *'Complete set up'* and step one is now finished.

The next box that you will be presented with is this one:



The screenshot shows a navigation bar with 'Home', 'Messages', 'Subscribers', 'Sign Up Forms', 'Reports', and 'List Options'. Below the navigation bar is the 'Add Subscribers' section. It features an illustration of a folder with several cards, each containing a person icon and a checkmark. To the right of the illustration, the text reads: 'Add subscribers to your list. You can manually import subscribers one at a time. Have more than 10 subscribers to add at once? Copy and paste the list of subscribers or upload a file containing their information. [Learn more about adding subscribers.](#)' Below this text are two green buttons: 'Manually add up to 10 subscribers' and 'Import more than 10 subscribers'.

I want you to ignore this one for now, and instead follow the steps below.

First, let me outline the entire process before taking you through each step, so that it makes sense in the bigger scheme of things.

Remember the two different ways that you are going to use your email marketing software will depend on whether you are a **Marketing DNA Now** or **Marketing DNA Nurture (Module 1)**.

In the following pages is the entire process summary for each type of Marketing DNA

# The Complete Aweber "Marketing Now" New Prospect Journey

## 1 You Speak With A New Prospect

Whilst speaking with every potential new client, you add them to your email marketing database, simply saying "I have just sent you an email to confirm that I have the correct email address for you. Please click the link in that email to confirm that I do."



## 2 The first email is sent asking them to opt in.

They receive the email with the button "Confirm your email" which they must click to be added to your database.



## 3 They are redirected to a 'thank you' page on your website.

This page thanks them for confirming their email address and explains that the free guide will now be emailed to them.



## 4 You've done it!

You now have a new email subscriber!



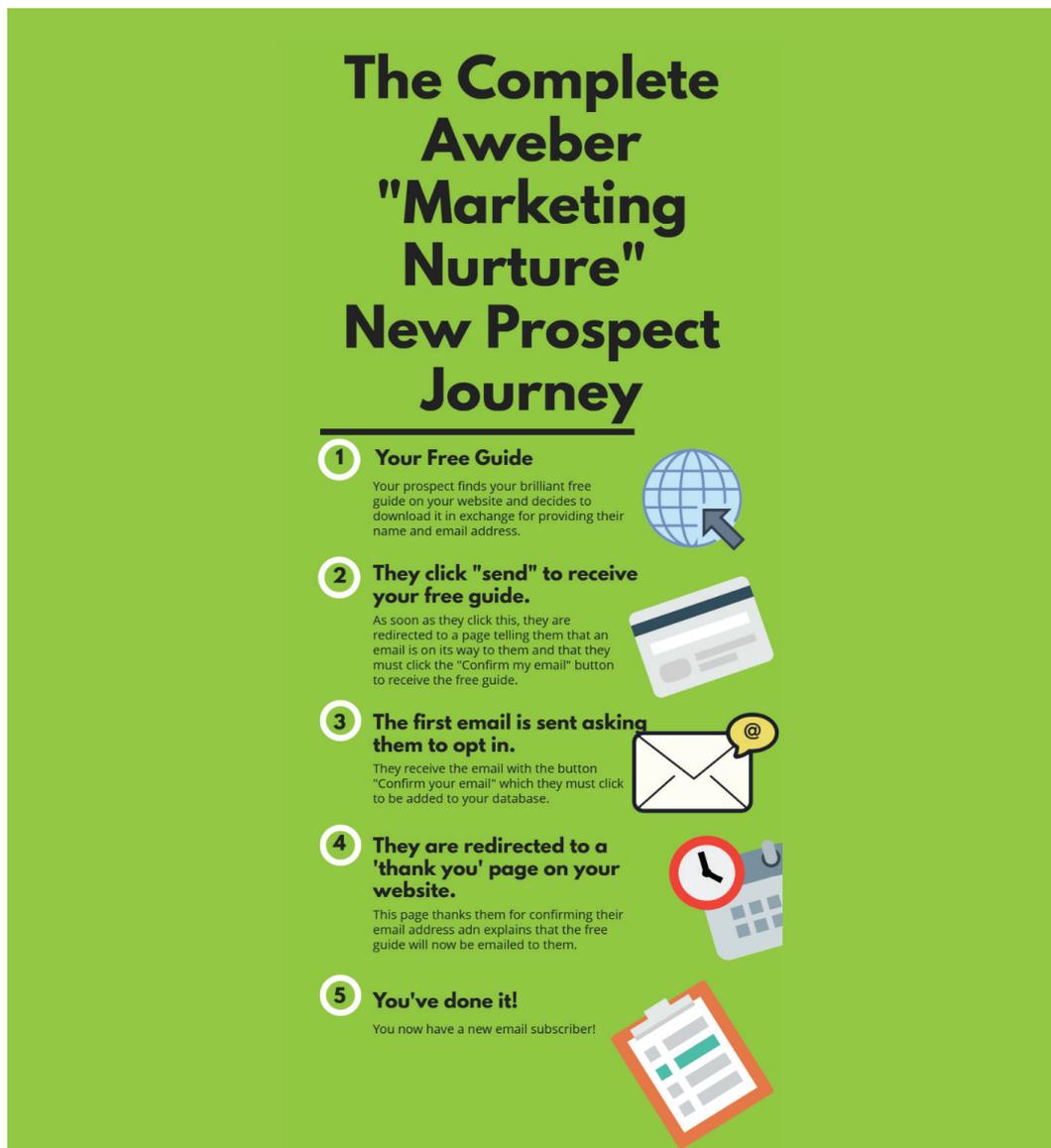
It is an easier process for **Marketing Now** leads because you don't necessarily need a free guide in exchange for your prospect's email address: remember that your primary objective is to get prospects calling you when they are ready to buy your services, so your use of email marketing here is to ensure that you have more than one method of following up (your email marketing) and for the future that they remain on your email list so that you can cross sell to them effortlessly and encourage referrals from them.

Therefore, you will be adding clients to your email marketing list when you have your first conversation with them using this wording to increase the chances of them clicking the double opt in link:

**'I have just sent you an email to confirm that I have the correct email address for you. Please click the link in that email to confirm that I do.'**

There are two ways that you can then add your prospect to your email address:

1. Inside Aweber when you are logged in by heading to Subscriber/Add New (the harder option) or
2. By adding a form to a page on your website so that you can add someone effortlessly without logging into Aweber. I recommend the second option, so follow the advice below for creating a form and then add it to a new page which is easy for you to remember, such as [www.yourdomainname.co.uk/email](http://www.yourdomainname.co.uk/email)



You can see that unlike with the **DNA Marketing Now** sequence, some parts of the process above are missing:

- Step 1 - the form on your website so that people can add themselves to your database;
- Step 2 - the page on your website asking them to click the link in the email from step 3 to ensure that they receive the free guide; and
- Step 5 - the email sending the free guide/video or other resource are currently missing, so let's put them in place in the order that it happens above.

## Setting Up Your Website Form

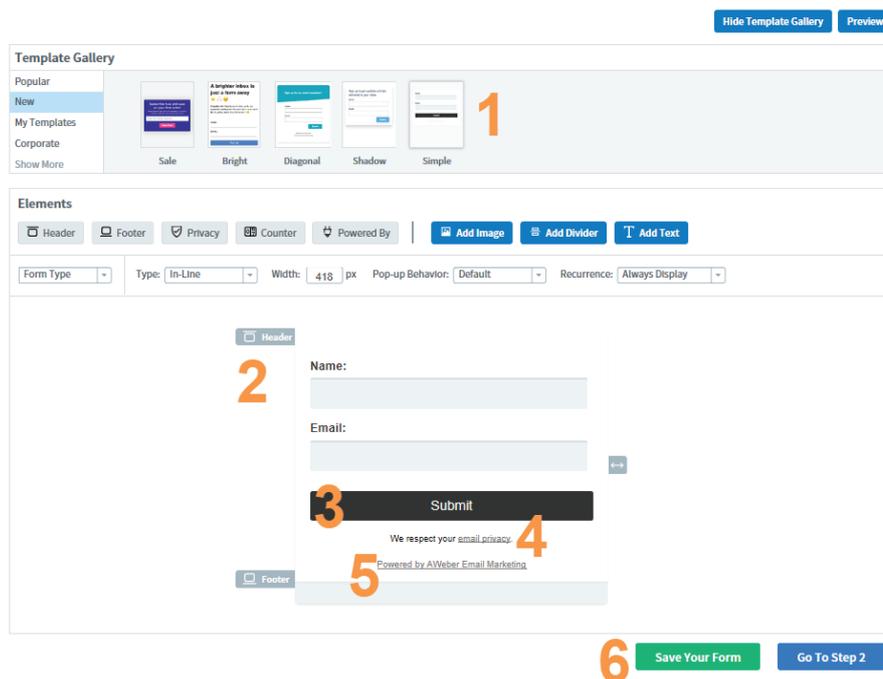
Even if you don't think that you are going to offer a free guide/video/-book on your website at this point (because you offer a **Marketing DNA Now** service), you need a form on your website so that you can add prospects to your email list while you are on the telephone with them or when you meet them at shows or networking events.

This is how you create that form.



1. Select 'Sign Up Forms'
2. Select 'Create a Sign Up Form'

You will now be presented with this page:



1. I recommend starting with a 'Simple' form as it will work on most websites, whatever your brand colours. You can always change this later.
2. The AWeber default is to simply have one 'Name line' for the forename and surname. I recommend changing this. Click on the name box and this pop up appears:

Select *'First & Last Name'* then *'Save Field'*. This will allow you to be as formal or informal as you like going forwards.

3. Submit is a dreadful word to put on a button. I know this because I have tested it and it consistently performs terribly. Change this to any of these which I know work much better *'Send'* or *'Send My Free Guide'*.
4. You may choose to keep this for those worried about GDPR, but you really do not need to as Aweber is a double opt in email service.
5. You definitely do not want to do Aweber's marketing for them, so delete this line. Hover over *'Powered by Aweber Email Marketing'* and the word *'Delete'* will appear, allowing you to remove it.
- 6, Save your form then once save, select *'Go to step 2'*.

You will then be presented with this page:

1. Name your form, for example, *'Free Guide'* or *'Client Email List'* if the form is only for you to use to add clients whilst on the phone with you.
2. Select *'Custom Page'* from the *'Thank You Page'* drop down. Create a page on your website like the one I use below and enter the URL of that page in this box:

Please confirm your email address

You will shortly receive an email asking you to confirm your email address. You must do this to receive your free guide.

3. *'Save Your Form'*
4. Click *'Go To Step 3'*.

You will now be presented with these options:

## Publish

Place your form on your site.

### Who Will Publish This Form To Your Website?



#### I Will Install My Form

You are comfortable with HTML and have access to edit your pages



#### My Web Designer Will Install My Form

Send an email to your designer containing the HTML and the instructions they need



#### Use My Form as a Landing Page

Link to a page that has my form

If you have Wordpress or a similar website system, it is incredibly easy to add the form to your page.

Simply select *'I Will Install My Form'*, copy the javascript code as shown below :

## Who Will Publish This Form To Your Website?



### I Will Install My Form

You are comfortable with HTML and have access to edit your pages

#### Javascript Snippet

The Quick and Easy Version

#### Raw HTML Version

Advanced Design Customization

#### Recommended

- If you change your form here, you won't have to update your website.
- Track statistics in your account.

You can paste the snippet below anywhere between the body tags of your website:

```
<div class="AW-Form-2054097611"></div>
<script type="text/javascript">(function(d, s, id) {
  var js, fjs = d.getElementsByTagName(s)[0];
  if (d.getElementById(id)) return;
  js = d.createElement(s); js.id = id;
  js.src = "//forms.aweber.com/form/11/2054097611.js";
```

Then simply paste this code wherever you want it to appear on your website. If using Wordpress, ensure that you are viewing the *'Text'* edit page before you paste the code in, not the *'Visual'* page or it will not load the form.

Update your page and your form will be live, as shown below:

privacy policy'."/>

Test Aweber Form

First Name:

Last Name:

Email:

Send

We respect your [privacy policy](#)

If you are going to ask your website developer to do this for you, simply choose *'My Web Designer Will Install The Form'* and email the code to him or her.

Now that you have created your website form, we need to do the following.

## Finish Basic List Set Up Options

To complete the remaining elements of the list, before moving onto the fun part of sending the automated emails, select 'List Options' as shown below:

Home Messages Subscribers Sign Up Forms Reports List Options

### List Options

- Basic Settings**  
Name & describe your list, set up notifications.
- Personalize Your List**  
Tell us about your company, set social media, etc.
- Confirmation Message**  
Update the message and settings.

#### Basic Information

The bare essentials for your list.

List Name \* \* required

Unique List ID: awlist5288484 [What's this?](#)

List Description

\*From\* Name  Address \*

Contact Address \*  
[Change this address](#)

#### Notifications

Receive an email every time a new subscriber is added to your list.

Enter your name and email below

1  Name  Email

2

The basic information you have already completed earlier in this process (List Name and Description), so let's move onto the new part:

1. This is the fun part. Add your name and email address here so that every time someone is added to your email list by downloading a guide from your website (I will show you how to do that bit shortly) you will receive an email telling you this. I have been email marketing since 2004 and I STILL get excited when I receive these emails; one more person I may be able to help has entered my little world – I love that! You will soon too if you do not already have this in place.
2. Save your settings.

Next, select '**Confirmation Message**' from the page that you are still on (once you have saved your changes as described above).

## List Options

 **Basic Settings**  
Name & describe your list, set up notifications.

 **Personalize Your List**  
Tell us about your company, set social media, etc.

 **Confirmation Message**  
Update the message and settings.

### Confirmation message

If turned on, a confirmation message (aka double opt-in or confirmed opt-in) is sent to your subscribers immediately after signing up to your list. This allows them to confirm they want to receive your emails. Some of this content is customizable, which you can update below. [Learn more](#)

### Language

Choose a language for pre-approved subject lines and default message content.

At the bottom of this page you will now see this section:

### Confirmation message settings

While we strongly recommend leaving confirmed opt-in *on* for deliverability reasons, you can disable it for imports or sign up forms on your website. Please [contact Customer Solutions](#) if you're using an API integration. [Learn more](#)

- 1  on **Send confirmation message for AWeber sign up forms**
- off **Send a confirmation message for subscriber imports**

### Confirmation success page

Subscribers will land on this page after clicking the link in your confirmation message. The [default success page](#) will be used unless you specify a custom success page URL.

- 2 **Custom success page URL**
- 
- Personalize your custom success page with subscriber information (Ex: first name)

**Save settings**

3

1. Ensure that the first box is set to *'on'* so that your new subscribers receive your double opt in email asking them to confirm their email address before being added to your database. This will keep you GDPR compliant.
2. The next part is important. If you leave it blank, when your new subscriber clicks the link in your email which says *'Confirm my email'* this is the page that they will be redirected:

**Thank you for subscribing!**

[Return to the last page](#)

Copyright © 1998-2019. All rights reserved. Reproduction strictly prohibited.

[No Spam Policy & Privacy Policy](#)

This page is on the Aweber website at <http://www.aweber.com/thankyou.htm>.

Take a moment to think about your prospects' journey at this stage, so that you realise why you do not want to leave these default settings in place.

First, they have found your website and have reached the point that they want to download your brilliant free guide in exchange for their email address (or you have added them whilst on the telephone with them). They enter their name and email address and are immediately sent your first email message, asking them to confirm their email address.

They click the *'Confirm my email'* button and are now sent to that page on the Aweber website.

That isn't a very nice experience, is it?

It is much better if you can send them to a page on your website, so that the process feels much smoother.

This is the page people are sent to on my website which simply tells them that they have confirmed their email address. Some people try and sell from these pages but I firmly believe that you have to nurture the relationship before you do that, so I keep it nice and simple:



**How To Get More Clients Coming To You!**

[Home](#)

[Free Resources](#)

[Services](#)

[About Me](#)

**VERIFIED**

Thank you for confirming your email address. Please check your inbox now for the information requested.

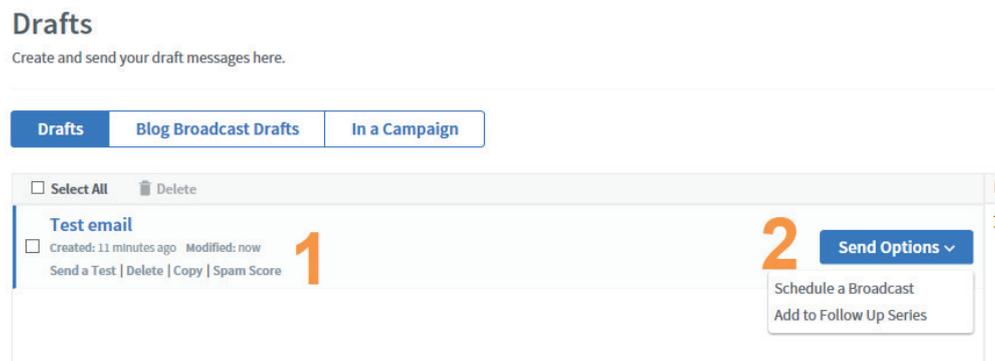
You should create your own version of this page and add it to a URL such as [www.yourwebsite.co.uk/thank-you](http://www.yourwebsite.co.uk/thank-you).

Now you are nearly there. What is missing? The email sending your free

## Setting Up Automated Emails

This is the fun part. This is where you can add emails which once added will go to everyone who downloads the guide in the future (*write this email once, send it 1,000 times – leveraged marketing at its best*).

To do this, from the ‘Messages’ tab, select ‘Drafts’ as shown below:



Now, before we create your first email(s) let me share one of the most important marketing messages with you:

***If you want your email marketing to be successful, every email that you send should look like it has been sent by you personally.***

It should look like an email that you would send to your partner about grabbing a bottle of wine on the way home.

It should not be branded or full of images because this immediately does two things:

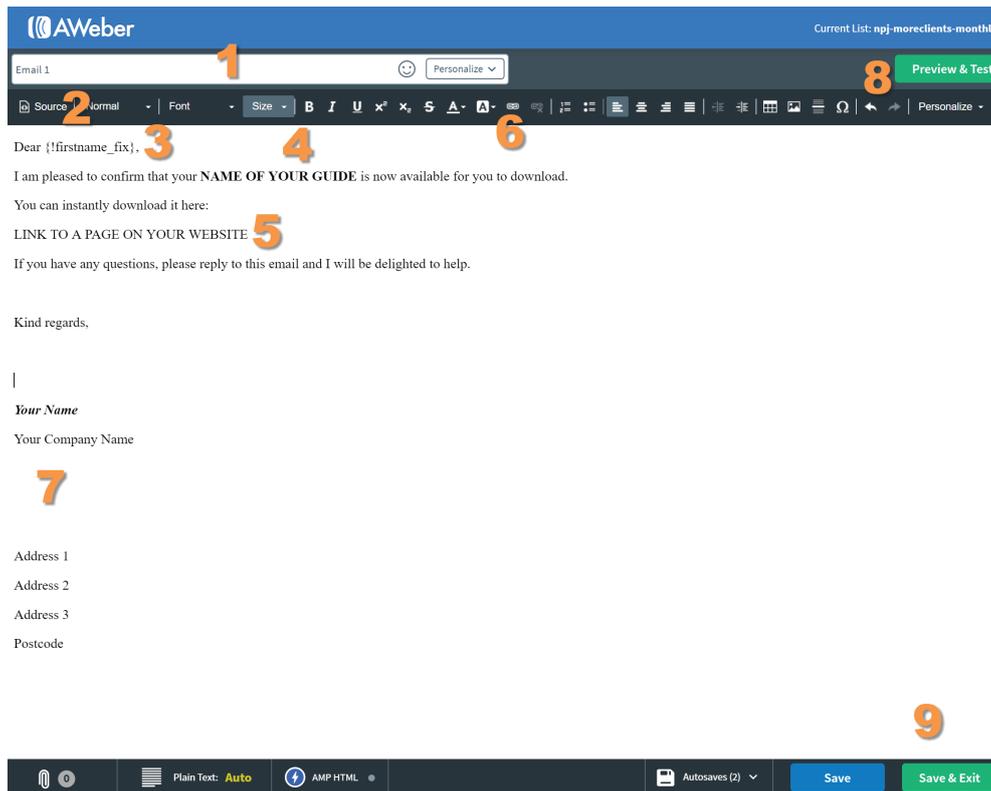
1. If it makes it past your spam filter (the images make it less likely to do so) more likely than not your email provider will strip out all of the images making it look very ugly; and
2. As soon as your prospect sees your logo he or she knows that you are just trying to sell to them.

So we need your emails to look very nice, plain and simple, just like the ones you send from your phone of preference.

With this in mind, let me show you how to set up a plain looking email.

First, ‘Create A Message’ from numbered point 1 in the image above.

You will now be presented with this page:



1. Enter your subject line. Remember this must always give a reason for me to open your email. As this is the first email that they will receive, this can be as simple as ***Your Free Guide Is Here*** if you are a **Nurture** service, or if you are a **Now** service and simply want to add them to your email database, all it needs to say is ***Thank you for confirming your email address***.
2. This is where you enter your email content and where your life becomes easier as a **More Clients Academy** member, because I have a template for you to cut and paste straight into the source code of AWeber to recreate the content above. Simply select ***Source*** next to the number 2 in the image above, then select all of the code in that box, delete it and then copy and paste into the box the code that accompanies this marketing hot sheet from the Word document in the resources section for Hot Sheet 2. Then select the ***Source*** button beside 2 again and the message above will now be in there for you. Now all we need to do is to customise it.
3. The ***first name fix*** code will automatically pull in your clients first name. If you would like to be more formal, click on ***personalise*** below button 8 from the image above and you can choose first name, last name or full name there.

5. If you are sending a free PDF guide, my advice is that rather than attaching it to the email, include a link to a page on your website where your prospects can download the guide. This will reduce the chances of your guide going into the spam folder but more importantly, when you update the free guide in the future, you only have to edit this one page on your website rather than several emails linking to it. To insert the link to the page on your website, highlight the words 'Link to a page on your website', replace them with your chosen words such as 'Click here to download your guide' then, with those words linked, click on the link button (number 6), drop in the link and you are good to go.

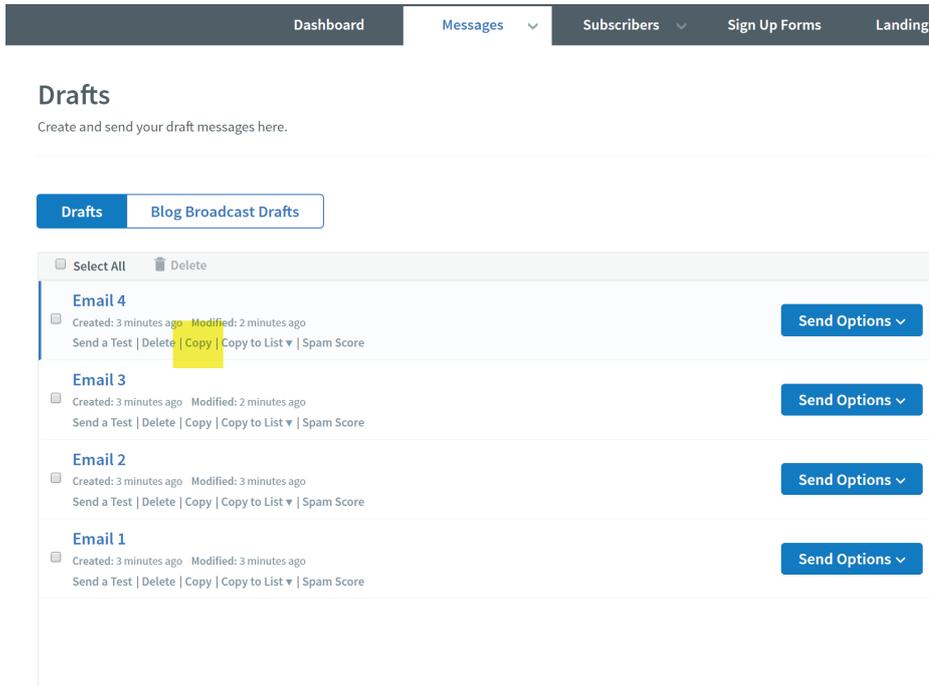
If you are simply adding a prospect to your email list as a **Marketing DNA Now** service, simply edit the wording in the first email to thank your prospect for confirming their email address.

7. Edit your name and contact details to complete the email.
8. You can now send a test email to yourself to check that it is working as you would like by clicking 'Preview & Test'.
9. Once you are happy, save your email before completing the final steps below.
10. Repeat this process for as many emails as you would like in your follow up sequence. If you are a Marketing DNA Now business and are not sending out a free guide, you do not need to do this next part as you only need to create one message which you can then copy and paste each month to form the basis of your weekly or monthly email. Skip forward to '*creating a broadcast message*' after the campaigns part.

If you are a Marketing DNA Nurture business, I recommend 6 to 8 emails which merely expand on some of the points you have already covered in your guide, but if that idea fills you with fear at this point, don't let that stop you completing this process. You only need one email in there to start this process and to be able to start growing your email database, so if you only have time to do that one now, do that one, then make a note to come back and add others on a weekly basis by following the process below.

The easiest way to create your next email is simply to click copy (image below) straight after you have saved your first email and this will instantly copy your next email to the list, until you have

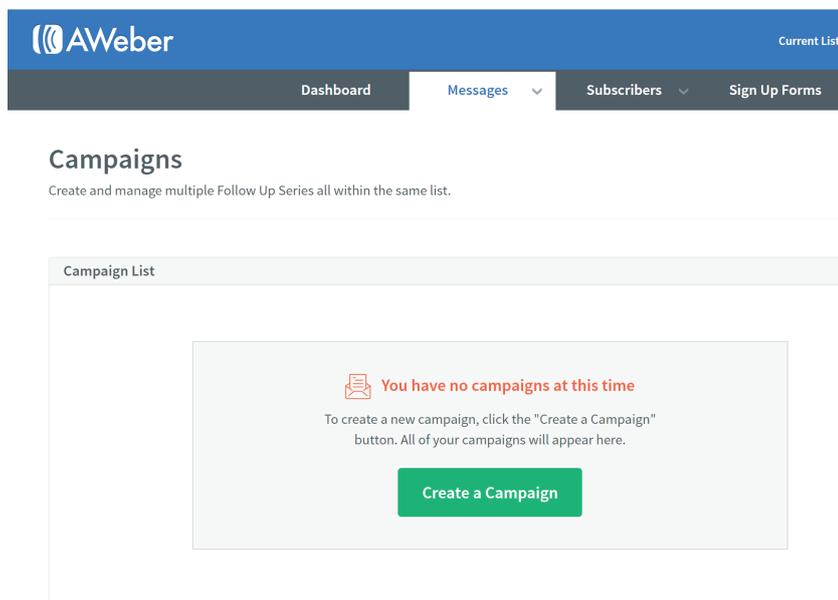
created as many as you would like. You can then edit them individually now or at a later date, but as I say don't let it stop you getting your free guide up and running on your website today!



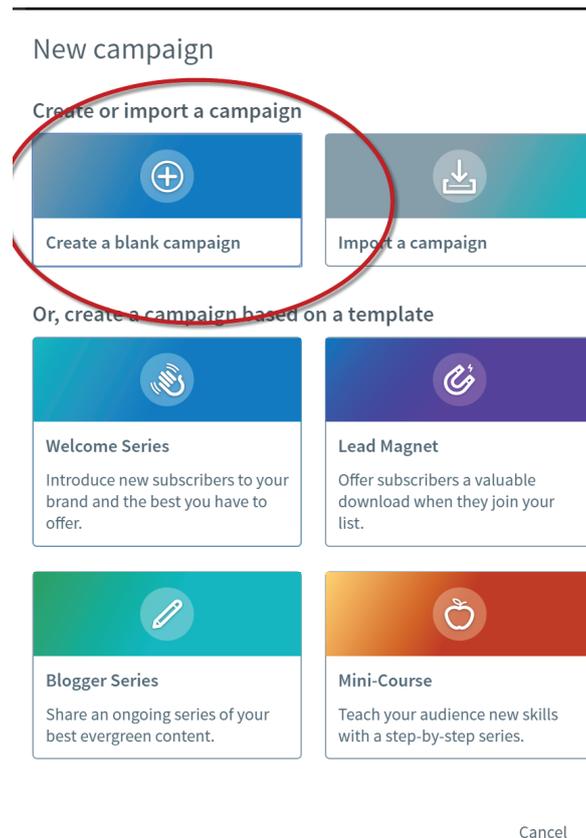
## Creating Your First Campaign

Your first email sending the link to the free guide (along with any other follow up emails that you have created) now needs to be placed into a 'Campaign' in order to ensure that it is automatically sent to your new subscribers.

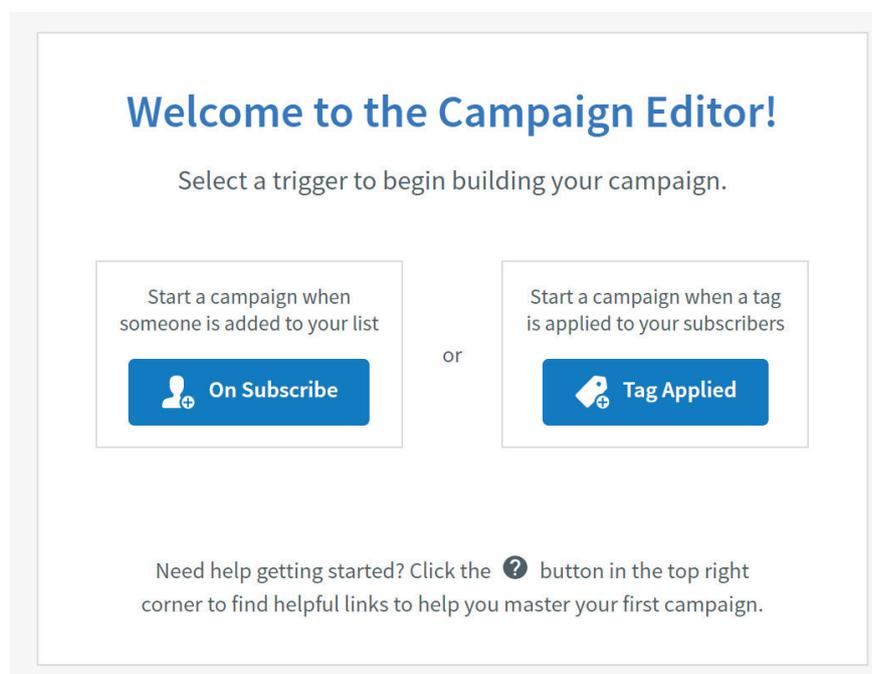
Select the 'Messages' navigation and then 'Campaign' as shown in the image below:



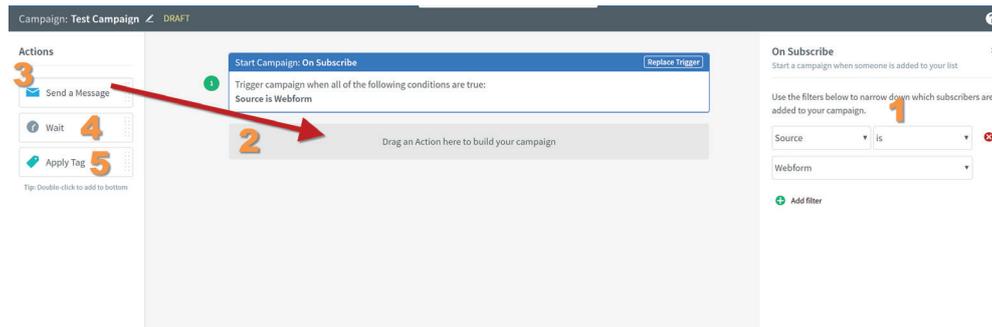
From the pop up, select 'Blank' campaign as circled below:



Give your campaign a name when asked to do so, before selecting 'On Subscribe' from the campaign editor as shown in the next image:



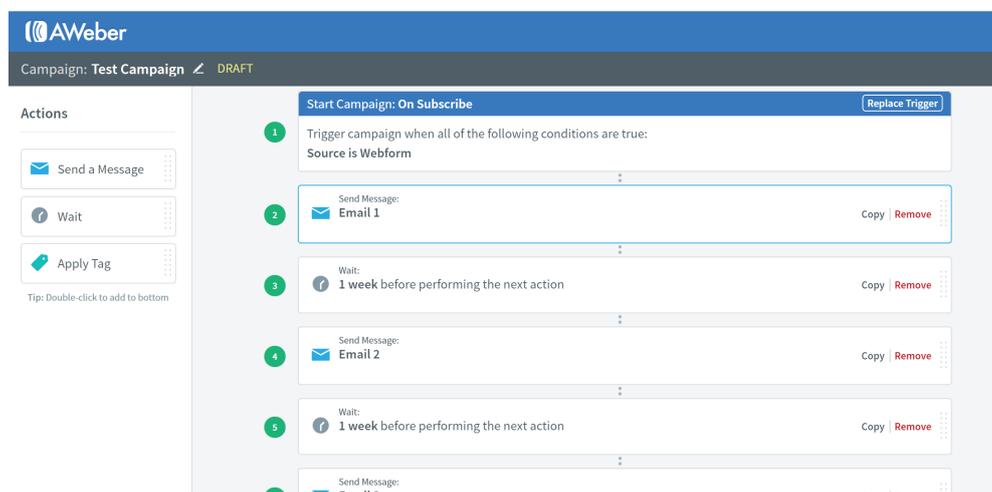
You will now be presented with this screen.



Following the orange numbers, complete the following steps:

1. Select 'Source is webform' for how people are coming into this campaign.
2. This is where you will drag items into your campaign.
3. If you only have one message prepared for now, simply drag that across into the gap at 2. If you have more messages ready for your follow up sequence, drag a blank 'Send a Message' block across for each of them.
4. Drag across a 'Wait' icon after each message. This will be the period of time before the person on your list receives your next message.
5. At the end of all of your messages, drag across a 'Tag' which is where you will apply a tag, for example called 'Finished Free Guide Download Emails' so that you can move them into your monthly or weekly email sequence.

Once you have finished, you should have a sequence that looks something like this:

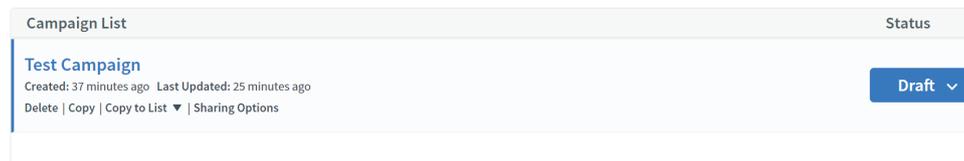


Once you have saved your new Campaign, all you need to do is to activate it.

---

## Campaigns

Create and manage multiple Follow Up Series all within the same list.



Select the blue drop down 'Draft' from the image above and click 'Activate' and you are done!

The final thing to do is to take yourself through this entire process so that you can see what your prospects are going to go through. Go to the page on your website where you have added the form and add your details to it so that you can see what happens.

If you also want to add people to your regular monthly or weekly email marketing list so that they hear from you consistently as well as receiving your free guide, there is one more step to do.

## Automatically Adding New Download Subscribers To Your Weekly/Monthly Email List

Whilst your new subscriber is going to receive a few emails from you sending them your guide, you also want to be able to keep in touch with them on your weekly or monthly emails.

This can be automated.

Create your weekly or monthly email marketing list by following the steps above (it will be much easier the second time I can assure you) as far as to the Campaign creation part (you do not need this part).

I do this and the list I move people into is called npj-more-clients-monthly as you will see below.

To add clients to your equivalent list, head to List Options and List Automation as shown below:

## Automation Rules

Automatically subscribe or unsubscribe someone to this list.

Use automation rules to subscribe or unsubscribe someone to this list when he or she subscribes or unsubscribes to another list.

For example, automation rules can help you [unsubscribe customers from your prospect list](#) when they purchase.

To make sure you don't create contradictory automation rules, only create one rule per list.

Action	List	Delete
Subscribe to list [npj-moreclients-monthly] when subscribing to <b>1</b>	npj-test <b>2</b>	
<b>Save Automation Rule</b>		

1. Choose 'Subscribe to list' [your weekly/monthly list name] from drop down 1.
2. Select the list name of your free download guide at numbered point 2 and then press Save Automation Rule in green to complete the automation process of adding them to this list.

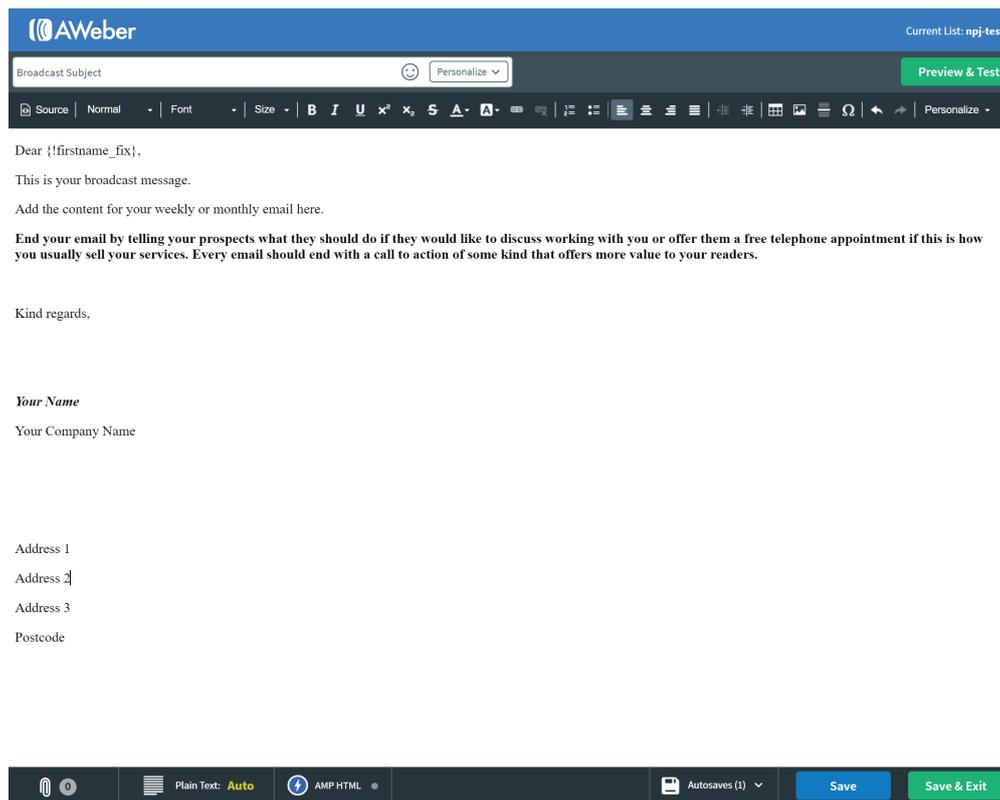
Remember, you need to be in the list that you want to copy people into when they download your guide for this to happen (as circled in red in the image above).

Now that you have done this, let me show you how to send your weekly or monthly email messages (which is more straightforward than sending your guide in Campaigns).

## Creating A Broadcast Message

This is a relatively straightforward part of the process as you have already created one draft email now. All you need to do is to add the content to it which is the basis of your broadcast message, then schedule it to be sent.

Here are some prompts/reminders:



Once you have added the content for your email newsletter (see Module 2), you now need to schedule your email to be sent to your audience.

### Drafts

Create and send your draft messages here.



Select 'Send Options' from the image above to send your message.

You will then be presented with this screen:

---

Broadcast Settings

Subject: [Broadcast Subject](#)

Do you want to share this message? <a href="#">Edit</a>		
Broadcast Archive: <b>Enabled</b>	Facebook: <b>Don't Share</b>	Twitter: <b>Don't Share</b>
Who should receive this message? <a href="#">Edit</a>		
Current List: <b>npj-test</b>	Send to Segment: <b>Active Subscribers</b>	
When should this message be sent? <a href="#">Edit</a>		
Send: <b>Immediately</b>		
Do you want tag automations? <a href="#">Edit</a>		
Automations: <b>0 Applied</b>		

**Message Options**

- Track clicks on website links in this message. Click automations require click tracking.
- Email me when QuickStats are available

[Cancel](#) [Send Message Now](#)

If you simply want to send the message immediately, click 'Send Message Now' in the green bar and it will be sent for you.

If you want to schedule it for a later date, click the blue 'Edit' button and enter the time that you would like to be emailed.

My preference is 11am on Tuesdays and Thursdays as that seems to get me the best open rates.

Once you have sent your first broadcast message, it is very easy to repeat the process each month.

All you need to do is to head to 'Messages/Broadcasts' from the navigation, then select 'Copy to Drafts' from your last Broadcast message and you have a message to edit and send again.

Repeat this process every week or month to send your latest email to your ever growing email list.

**You Have Done It!**

**Well done! You now have an email marketing database, a way to add people to it from your website and you know how to send weekly or monthly emails!**