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Rainmaker Webinars

Q&A on Making Integrations, RainMail, and Autoresponders Work for You

Jerod Morris and Chris Garrett

TRANSCRIPT

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Jerod Morris and Chris Garrett

Jerod: Hey there, everybody. Welcome to the latest edition of the Rainmaker Site Building Roadmap. We're going to be talking about email marketing today, email marketing with Rainmaker. And we have a bunch of questions from you on making integrations, RainMail, and autoresponders work for you that we are very excited to get to.

I am Jerod Morris. I will be your host, and I am joined, as I am typically am here on the Rainmaker Site Building Roadmap by Chris Garrett, who is still dealing with the after effects of dental surgery, but is plowing ahead, toughing it out, and is here to lend his insight to us on today's session. Chris, welcome.

Chris: I'll be fine. I can talk. I've got caffeine. I'll be good.

Jerod: Okay. Here we go. Let's roll on, and let's answer some questions. So here is our Q&A on Making Integrations, RainMail, and Autoresponders Work for You.

Sending different messages depending on how the person responds (00:00:50)

Jerod: We will kick things off with a question from Fred. So Fred asks, "For a welcome series of messages delivered using an autoresponder, I'd like to send a different message depending on if and how the person responds to an earlier message."

So Chris, we discussed this, and there are really two different methods that you can use to do this. One would be sending emails using the unique identifier, so that the subscriber has your site's cookie set after they click the link in the email. And don't worry, I'm going to show you what this means here in just a second. After you do that, then you want to place a tag on the page that they land on. Or, do a tag and a redirect. And then in your autoresponder sequence, you can use conditionals to send or not send emails based on the presence of the tag.

Now, you know, if you're seeing terms like unique identifier, tag and redirect, and they don't quite make sense to you, again, we have a few slides here in the tutorial to show you what these mean. But the Knowledge Base also spells these out in great detail to help you work through these if you want to add them to your site. So that process is number one. And then you can also use marketing automation to put them onto different lists if you want to. You can do it based on tags, or you can actually put people onto different lists if you choose to do it that way.

Chris: Yeah. And that number two, a lot of people find that easier to get their head around. And there's no right or wrong answer here. You don't necessarily have to do things a certain way. So, there's no shame or disadvantage to putting people on a different list. And the way you can send broadcast emails, and you can use the autoresponder sequences, it doesn't matter if they're on a tag or on a list. It can deal with it just as well, so ...

Jerod: Yep. All right, so let's walk through this example. And Chris, this is actually an example, I believe, from your Maker Hacks website.

Chris: Yeah.

Jerod: So what we're seeing right here, this is a condition for an email in an autoresponder sequence. And if you're not familiar with those yet, we talked about those in our previous webinar that we did on this topic. But basically, every autoresponder message that you set up, you can add these conditions that tell the message if it should send or if it should not send based on certain criteria. Like, if a person is on a specific list, then don't send this message. Or if a person has a specific tag, don't send this message. Okay?

So, in this one in particular, this autoresponder email that this condition is attached to is a reminder to take a quiz. So this message will only be sent to subscribers who do not have the tag, 'quiz.' Right? So, you see this conditional, it says, "Select the tag. If they are not tagged with 'quiz,'" meaning they've taken the quiz, "then send this email." Okay?

Chris: Yeah. And the intention behind this, just a bit of background is one of the ways I'm going to monetize the site is a 3D printing class. So, I want to people to take the quiz, realize they don't know as much as they thought they did, then they'd be primed to buy the course. So, I only want to send it to people who haven't already taken the quiz, because otherwise it'll get annoying and it's not something you want to take twice.

Jerod: Yep. Okay. So, that's the condition.

Now, here, what you're looking at right now is a view of an individual subscriber's tags. Okay? So, this person has a '1' for quiz. And that means that they have this tag. So, in this example, this subscriber would not receive the email from the previous slide because they have taken the quiz. That's why they are tagged here with a one. And the way that this tag was set is on this page, okay, if a cookied subscriber lands on this page, then they are tagged with "quiz." And they will not get the reminder email. Cause once they've landed on this page, that means they've taken the quiz, so they get this tag. Okay, and that means that they will not get the email.

Chris: Yeah, and that conditional doesn't care if it's the value 'yes,' or 'value equals one.' It just needs to have the tag. So, don't worry about that 'value equals yes.' It doesn't have to be explicitly a specific value. It just has to have the tag.

Jerod: Yep. Okay, now ... When we talk about a cookied subscriber. If you want to make sure that your subscribers have the Rainmaker cookie when they click a link in an email, add this to URLs that are pointing to your site, right? This is gonna be a little bit challenging for me to describe if you're just listening to the audio version, but it's basically ?rm_sub_unique=[unique_id].

If you add that, then basically what that will do is when the person clicks on the link, it will add their particular Rainmaker hash ... It will add the cookie, and then they will be a cookied subscriber who is then clicking, and you're able to do all this stuff. Chris, is there a more elegant way to describe that than what I just stumbled through?

Chris: Yeah, just what you just said, I think. The other way to get that cookie, of course, is if they've just opted in. But you can't guarantee that's gonna happen. So, one of the things that we tend to encourage is like, a logged in experience. Then it doesn't matter if they're using a cellphone, a tablet, a laptop, or a desktop PC. But you can't guarantee that, especially if all they're doing is clicking in emails. Beause, this is the next best thing. Getting them to be cookied. And then you know who they are. And that unique ID, that unique subscriber ID is that person's unique identifier so that you can make decisions about them, and so you can add information about them.

Jerod: Yep. All right, now, so basically, if you're using that unique ID, if Chris wanted to include a link to his quiz page in an email, and wanted to tag people who visited the quiz page, he would then place this link in his email. So you basically take that part that I just described in the previous slide, and you add it to the end of the link. You append that link with that string. Is that what you would call it, Chris, is a string?

Chris: Yeah.

Jerod: Okay. So you would do that, and then this way, as we just mentioned, even if a subscriber has cleared their cookies, now the RainMail cookie will be set when they click, and the tag will be added once they visit the page. And then you can also tag and redirect users to a different page if you want to do that as well.

Again, if you go into Tag and Redirect in the Knowledge Base, there are very, very detailed instructions that show you exactly how to carry that out. Chris, we're gonna talk, when answering a later question about whether you should use tags, or whether you should put people on different lists. So we don't need to address more of that right now. But anything else here? Any other insight on how this works? Maybe to help Fred or anybody else with this process?

Chris: Yeah, I just want to speak to the people who are looking at the slide that says, "Simple example," and saying, "That ain't simple." When you've done it, it makes more sense. Seeing somebody else's example is probably not as useful as taking the idea and thinking about how you could use it yourself. Okay?

So, another example would be Brian Clark. One of his websites has entrepreneurs and freelancers as an audience. And sometimes he has to speak to them differently. So, he could get them to self identify as a freelancer or an entrepreneur, and then in his autoresponder sequence say, "Hey entrepreneurs, this is something that's really important for you." So it ... It's not necessarily the approach that you have to take, either. You know? So, don't be worried looking at it, saying, "It's not simple." Because, you know, you can play the webinar back and you don't have to worry about it necessarily. There are other approaches to doing a similar thing.

Recommended auto email flow templates (00:08:32)

Jerod: Yep. All right, moving on now to question two from Nancy.

Nancy would like some recommended auto email flow templates that she can start using for new signups to her email list who have not purchased a product yet. What types of messages to send them, how many messages, how long between messages, et cetera. She needs a starting point.

The possibilities are unlimited with Rainmaker, but since she's a one person marketing and web content department, she needs guidance on getting her first few series set up. Well, Nancy, you are exactly the person who should be using Rainmaker, and that's why we created the autoresponder templates inside of Rainmaker beause they really are a good start. And I'll show you those again here in just a second.

But another option for you is the book, Invisible Selling Machine, by Ryan Deiss. It has a lot of email templates in there. Now, I will offer that with the caveat that the writing tone is pretty sales-y. Like, it comes across pretty strong, and so just because something works for Ryan, and what they're doing over at Digital Marketer, doesn't necessarily mean that it will be the right tone for you and your audience.

So, as with anything, you want to adapt the tone of any template email that you get so that it's in your authentic voice, and so that your audience doesn't look at this and say, "Wait a minute. Nancy copied this from somewhere. This doesn't sound like any other communication we've ever gotten from her." You don't want that.

You've gotta maintain the authenticity. But, again, the templates that are already there in Rainmaker, some of what they have in Invisible Selling Machine, that can be a good start. And we are actually in the process of creating a content series at Copyblogger dealing with this very topic. So, stay tuned with that.

Chris, you, Sonia and I were actually exchanging some emails about that just the other day.

Chris: Yeah.

Jerod: And that's a content series that we're pretty excited to do. I don't know exactly when that'll be coming, but Nancy, stay tuned for that because there will be more content coming on that topic.

Chris: Yeah. And the other thing I'd say is test. You know? It's one thing to get given templates, and it'll give you a good foundation, a good starting point. But, don't then think, "Okay, that's done. I never have to think about that again." Because you do need to tweak and test, and see what works for your audience, your products.

Jerod: Yep. And so, Nancy, just as a quick refresher, when you go to "add a new autoresponder sequence," you will see these three different templates. You can start with a Course sequence, you can start with a Sales sequence, and you can start with a Newsletter with Offer sequence. You can also start Blank, of course, if you want to. But if you choose one of those, then once you go in, there will actually be emails already populated.

So, this is what the core sequence looks like. And they are actual emails that are loaded in, that you can the tweak for your sequence. Now, notice how by default they're all inactive. Just because you go in and choose that sequence, all these emails aren't automatically in there. You have to go in and activate them. And you certainly want to do that because there's, as it says right here, this "Please Delete" section, there's some text and some instruction in these emails that you're going to want to remove.

But they give you kind of the overview, and some of the important notes that you need to know about that email. And then it's got actual text, right here. This is a welcome email. Right? "We're so pleased to welcome you to this course. Here is what to expect. Very soon you will receive a receipt." Yada, yada, yada. And so it gives you, you know, so like, right here, "For every ... For the next day, week, month, we will blank." So it gives you some spots that you can fill in. A very simple template, proven that works, that we wrote ourselves. So that is a really good place to start, right there from Rainmaker. And then, of course, we mentioned some of the other avenues that you can go down to find some additional help as well.

What determines when something comes out of beta? (00:12:06)

Jerod: Okay. Moving on, now, to question three from Charles. "So, when something is in beta, like, 'get responses' currently as of us recording this, what determines when it comes out of beta? Does it have to be perfect? If we were allowed to use a product service that is in beta, does that mean it's safe to use?"

So Chris, I'll give you a chance to discuss this here in a second. But the basic answer here is that, for a feature to make the cut into Rainmaker Labs, it first goes through development, and is then subjected to a series of QA tests. Quality Assurance. And once we are satisfied that it works well for the majority of people, we will put it into Labs.

And we do not take this decision lightly, because we know that if a feature is in Labs, and it's there, available for you to use, a lot of you are going to use it. And we want to be, you know, 95% sure that it's going to work, and be very, very confident because the last thing that we want to do is to have a feature inside of Rainmaker that's going to tank your site for whatever reason.

So, we don't take this decision lightly. But at this point, we need more people to use it in real world situations to see if it has any as yet undiscovered imperfections. So we can test it, and put it through its paces, and do everything that we can in the dev and QA processes, but there's still that last, you know, four or five percent, whatever it may be, that just needs to be tested out there in the real world. And so, we get it all the way to that point, and then we put it out there and really appreciate you testing it and giving us feedback on the feature.

But the bottom line is that we wouldn't put it in Labs if it isn't, in our opinion, safe for the majority of users. But you really do have to use it in real world situations to fully test it with other people's customizations and content, et c etera. Chris, anything else that you would add when it comes to Rainmaker Labs?

Chris: I think that's the best answer. Just to give you a bit more expanded perspective on it, beta means it's almost ready for release. Right? So, there's a lot of people that think that an MVP, or a beta is just put something out there and get the users to test it. That's not really how it's supposed to work. There is a stage before beta called alpha, and before alpha it's in development.

As Jerod says, it's been through a process, and we'd never put something out there that's untested. And we'd never put something out there that we weren't confident was going to work. Because it's your lists, and it's your business. And we don't want to tank your business by making a mistake.

But at the same time, we haven't been able to try it against every combination of theme, feature enabled, content, how you use it, how your site's set up, any customizations you've made through the custom theme process, all of that kind of thing. You know, you could have custom scripts in there. You could have Custom CSS styling in there. So, the things that can happen, we're not anticipating anything like, you lose a list. But what could happen is the user interface could be funny because you've got some CSS we never expected. That kind of thing. And so, that's why it's in Labs.

One of the other reasons why it's in Labs is so that people can enable it and disable it. So, if there is a problem, it means that only the people who have enabled it will see the problem. And everybody else is unaffected. Once it goes into Rainmaker as a whole, you know, for everybody, then the feature is more likely to impinge on other things. Right? Does that make sense?

So, Labs is kind of like a sandbox, and it's siloed. And so it's, even if there's a problem with it, which we don't anticipate there being. Even if there is a problem, it's siloed. So, beta means that we're almost ready to release it. So the next stage after beta is release candidate, and then it's actually released.

Jerod: Yep. Thank you, Chris.

Is there a tag record of what emails are sent to individual contacts? (00:16:10)

Jerod: Moving on now to Rosalyn's questions. "Is there a tag record of what emails were sent to individual contacts in case I should want to review a contact and see what I've sent to them?"

The answer here, Rosalyn, is that there is currently no record of emails sent to individual contacts or tags. You can, however, view all sent emails and sent emails by list. So it's not exactly what you're requesting here, but it is kind of the best way to get as close to that as possible, given the current setup. And the way that you view all sent emails is if you go to Edit>Broadcast Emails, you can see the full list of all the emails that you have sent, and then you can also go in and look at an individual list. And I don't have this pictured here but if you go into Settings>Email, look at Manage your lists, you can then go look on a list by list basis and see what emails have been sent to specific lists. But it isn't currently done by tag.

Common tagging practices (00:17:09)

Jerod: The next question from Rosalyn, "Will you please review common tagging practices? I would imagine we'd want to set up by category. Is that possible? And then by tags. Any suggestions? Can I see the list of tags that I've created?"

So, a lot to unpack here, and I think, first it's important to note that email tags are different from post tags. And given Rosalyn's association here between categories and tags, I wonder if she might have that mixed up a little bit. Email tags tag individual subscribers based on parameters that you set. You know, so you want to know who's interested in copywriting, and they click on a particular link and go to a page that tags them as copywriting. That now tags that subscriber as interested in that topic. Post tags, on the other hand, add descriptive tags to individual posts that then allow you to organize content by topic.

So you may have a post about copywriting, and you tag that as copywriting. Then you can look at all the posts that are included in that individual tag. But, subscriber tags and post tags are different. And, to your last question, you can see your tags from within the subscriber edit screen, or when you send a broadcast email. Okay? So, here are the two ways that you can do that. And then we'll go back and unpack the previous discussion a little bit more.

But if you go to Manage>Subscribers, then click on an individual subscriber, you'll see a dropdown menu that lists all the tags that you've set up. Okay? So you can see them all right there. See exactly what words you used, how you set those up. They're all right there.

You can also see them when you go send a broadcast email. You'll see your tags in the recipient section in the sender and recipients tag. Because obviously you can send or suppress any email based on those tags. And so you can see a list of them all right there, and you can make sure that you're being consistent with your tags. Chris, is there anything else that you would add when it comes to common tagging practices?

Chris: I don't think there are common tagging practices, so it's just basically what's going to work for you and what you need. And, you know, if you haven't gotten the basics set up yet, you know, if ... You need to have a prospect list and a customer list. And you need to be sending emails to them, and you need to keep them engaged before you do anything with tagging.

Make sure you're doing the basics first. And there's a lot of advanced business out there that do a lot of really experimental, or really innovative things that don't have those basics in place. So, I would encourage you to make sure that you're attracting, retaining, and converting before you go too far into the tagging side.

Is it better to create one list with all of my contacts and sort according to tags, or to create separate lists? (00:19:40)

Jerod: Yep. And Rosalyn's third question. "Is it better to create one list with all of my contacts and sort according to tags, or to create separate lists? What are the pluses and minuses of doing either way? I heard that if you create one list, then the opt out means you lose the subscriber for everything. But with the multiple lists, they may only opt out of that specific list, but not altogether, albeit it is more difficult to track."

So, let's talk about this Rosalyn. As we said, tags allow you to simplify your list structure, and give you greater flexibility to create automated adaptive content, right? This is what we talked about in question one that Fred asked.

Additionally, you can do more with a single broadcast email when you're using tags as opposed to if you're doing everything in separate lists because then you need to send separate emails. Now, you're right. If someone unsubscribes from a single list, they are no longer a subscriber. And if you have people on multiple lists, then they can unsubscribe from one list, but they're still on another one. But there are smart ways to merge the two methods, and to use tags to add people to multiple lists based on their interest. I'll give you an example of this.

At the Assembly Call, when people subscribe to our list, they get our regular newsletter that has news about the basketball team, and our Six Banner Saturday news roundup, and our important show updates. But we also automatically subscribe them to the deal of the week. This is where we send out a deal with an affiliate link to some kind of IU gear that people will like. And obviously, then we get 10% of the proceeds for that.

Now, instead of setting that up with a tag for people who want that, I actually set that up as a separate list because there's always a higher likelihood when you're sending something that is kind of sales-y, especially something like that that is directly, I mean it's straight, you know, "Here's a deal. Check this out. See if you want it." There's always going to be a higher likelihood of people unsubscribing from those emails.

I didn't want people to get that deal of the week, not want it, say, "Screw this, I'm unsubscribing," and then they're off all the lists altogether. So I made that separate so that they could unsubscribe from the deal of the week, but they still get all of our content messages, which is the primary reason that they signed up in the first place. And that way then the people who stay on the deal of the week email list, I know that they're really engaged. So it's very easy, you know, those emails all deal with a very specific topic. It's very easy to just send those email blasts separately, and do it to the list rather than do it with a tag and risk people unsubscribing.

So that would be one example of where I think having a separate list makes some sense. Again, there are going to be lots of different iterations here. You just want to think it through, and see what setup makes the most sense for you. Chris, how would you counsel Rosalyn here?

Chris: The great thing about having a separate list is that you've got an asset that's very clear and very isolated. The downside is it's another list to maintain. What we tend to do is have a prospect list and a customer list, or have a list per product. But, when somebody signs up for something with Rainmaker and RainMail, they're automatically tagged with the product, so you don't have to do that.

What I like to do is definitely separate the people who have purchased from the people who might be interested in purchasing. And then, obviously, you talked about autoresponders as well. The new feature allows you to remove somebody from an autoresponder or a list if they unsubscribe from one or the other. And that makes it a lot easier. But, with the way the broadcast works, you can check a box to say, “Suppress this list,” or, “Include this list.” So, for a lot of people it’s an easier way of looking at things. It’s an easier way of understanding it. That is the main reason I would go for lists over anything else.

Is there a way to get a list of auto tags? (00:23:33)

Jerod: Yep. All right. Onto John’s question. So John says that he noticed that several tags are automatically set up when someone signs up to a list. “Is there any way to get a list of those auto tags?”

Every subscriber, John, gets tagged with their unique subscriber hash, which allows you to then use marketing automation features for subscribers who are not logged in members, as well as tags that identify the date they subscribed to your list. And if they purchase a product, or sign up for a free product, they get a tag that is a form of the product name as well, as Chris just mentioned.

So, when you go in, and when you look at an individual subscriber’s ... You click on an individual subscriber, you’ll see all their tags. And so, these are tags that were generated automatically for this test subscriber. You can see their subscriber hash, this is when they subscribed, so it’s got a couple of subscribe dates there based on different products, and free products that they have.

Those are the ones that are added automatically and you can go in and look at some of your current subscribers and see, based on how people are getting to your site, and what it takes for them to become a subscriber, you can see what tags are being automatically added to those folks, and then see how you want to use them then, in your communications.

Chris: Yep.

Is there a way to move people who cancel their subscription from the paid list, to an ex-subscriber list so that only paid subscribers get an email? (00:24:48)

Jerod: Question 5B, "So, if I plan to have a subscription product, is there a way to move people who cancel their subscription from say, the paid list, to an ex-subscriber list so that only paid subscribers get an email?"

We spend a lot of time talking about this one. And you can. I'm going to show you how can automatically add people to an ex-customer list using the change product field in your subscription product settings. Okay, so this will allow you to put people onto an ex-subscriber list. As far as automatically moving people who cancel their subscription, automatically removing them from the email list, I don't know if there's a way to do that. And Amelia and Brian in the chat can let me know if that is wrong, or if they've found another way.

Chris, do you know of a way that you can remove someone from an email list if they cancel a product?

Chris: I know it's possible, programmatically. I don't know if we've got a feature yet that does that. That's definitely something that should be looked at, though. So, I think that's one of the ones we'll have to ponder a little bit further. But that definitely needs to be a feature if we don't have it already.

Jerod: Yeah. No, I agree. And that's one of the benefits of doing these Q&A's is the process of going through and kind of putting together the tutorial. I didn't find an easy way. There may be some ways using marketing automation, and some redirects that you might be able to do it. But I don't have an example of that to show right now. But what I can show, is how you would put someone onto the ex-subscriber list.

The way that you would do that is, first step is just create a new product and call it "ex-customer," if that's how you want to do it. You can create this product, call it ex-customer, or call it maybe something more elegant if you want to. And just go down, you know, make sure that it's a free product. Okay?

Then you can also check mark the email receipt if you want to use it. But if you want to silently put someone onto this list, then uncheck this. But if you have a reason to put someone on the email receipt, like maybe you want to thank them for being a paid subscriber. So they've canceled their paid subscription, they get added to this ex-customer list. Now they get an email receipt that says, "Hey, thank you so much for being a paid subscriber for so long. We really appreciate it." You could use this opportunity to ask them a question about why they canceled. Something like that. Or, if they're still on the subscription email list, and you think that they might want to get off that you can always remind them to go use the unsubscribe link in a previous email to remove themselves from your customer list.

Now, if the emails that they're getting are part of the value of the paid subscription, I can see how you would want to remove them from that and not just make that an option for them. You can always manually cancel subscriptions for folks.

So, if you don't have just tons and tons of paid subscribers, and you get one cancel a day, or less than that, you can always just make a point to go in, see who's canceled, and then go remove them from the email list that way. But like I said, we'll work on the way to make that more automated. But, choose how you want to handle the email receipt. You're setting up this ex-customer list, and then at the bottom of the ex-customer list product setup page, you want to add them to the ex-customer email list.

So, create an ex-customer email list. And in this example it's just called "test," but you can call it whatever you want and attach it to this product, so that when people receive this product, they are placed onto this email list. So, you've got that product created. Save it. Now, go into your annual subscription product. Right? You're either creating a new one or you're editing your existing annual subscription product. And you will see, 'Change Product.' You'll see this field for 'Change Product.'

Well, start typing in the name of this ex-customer product that you just created, and you will see it come up. And so, once you choose that, now when someone cancels their annual subscription, they will quote unquote "receive" this product and basically all this product will do is place them onto your ex-customer email list. And so you've got that part of it down. And once you figure out a way to cancel them from the customer list, then John, I think you'll have this entire process that you were asking for. Chris, anything that you would add to that process?

Chris: No, I think that's the right approach.

Jerod: Okay. Excellent.

Can Rainmaker integrate with Leadpages? (00:29:12)

Jerod: Onto Ash's question. So Ash wonders, "Can Rainmaker integrate with Leadpages?" There is no official Rainmaker integration for Leadpages. Chris, do you have any advice for folks who want to use Rainmaker with Leadpages?

Chris: Contact Support. I'm not familiar with Leadpages, but there must be a way of working with it. I'm not familiar with how it works.

Jerod: Yeah, and I'm not either, so ... That's about as much as we can give you on ...

Chris: Not very helpful, sorry.

MailChimp versus RainMail (00:29:40)

Jerod: Richard is wondering, he's at the very start of his journey in terms of building a list and he's having trouble figuring out whether to commit to MailChimp, where he has an account, or RainMail. So, what criteria do you recommend he should be looking at to ease this decision?

I think the part that Richard mentioned is about being at the very start of his journey makes this, from our perspective, a relatively simple answer. So, an important criteria for people getting started is, you know, how big is your list?

Richard in this case is just getting started so using RainMail will actually allow him to build his list without spending an extra dime. That's a rather important typo there on the slide. It's "without spending an extra dime," not, "with spending an extra dime." Because the first 999 subscribers ... It's always bad when the typo actually changes the meaning of the sentence, you know?

But that should say, "without spending an extra dime." And moreover, independent of the money that you're spending, or what you might save with RainMail, RainMail of course is going to offer the most complete integration with the platform, because it gives you those options for tagging and adaptive content marketing automation that, in terms of integrating with the platform, aren't available with third party email services.

I get if you are already deep within MailChimp or someplace else and you don't want to change that, but you still want to integrate with Rainmaker, that makes sense. But if you're at the very beginning, I think it makes extra sense to start building with RainMail. To take advantage of that time when you don't have to pay for subscribers, and really see if you can put all of the advantages of RainMail to use.

Now, if it's not working for you and you want to switch to another one later, you can always export your list and do that. But I think it really makes sense if you're just getting started, to kind of harness that power of RainMail and Rainmaker from the beginning, because I think ultimately it's your best option if everything works out how you want it to.

Chris: There's enough work for you in building your business and building your site without switching tracks later. If you're just starting out, I would choose one tool. And that's Rainmaker right now, for you. It allows you to have one login, one system, one integrated system. And you're not having to learn different things, and deal with different companies, and different payments and ... So, simplifying is always a good idea. Almost always a good idea. But also, it's like Jerod said, are the features there in MailChimp that you would want in the way that you would want them? MailChimp has added features recently, but they're not necessarily integrated into Rainmaker and you're using Rainmaker as your website platform.

So, just like we tell people, you know, you can build your site in WordPress, and you can pick out all these different plug-ins, and you can work out which plug-ins work for you, and which fit your budget. Or you can just use Rainmaker. It's a similar sort of question. Do you want to be building content, or do you want to be working on your IT? And so I would recommend, because you're starting out, RainMail makes sense to me.

Is there a way to filter on the active/inactive users? (00:32:52)

Jerod: Yep. All right, onto Lucas's question. "Is there a way to filter on active or inactive users?" Lucas, in this case, an individual subscriber could be active for one list but inactive for another list. Subscribers cannot be filtered by active/inactive status. You can, of course, go in and look at an individual subscriber and see all the different lists that they have been subscribed to, and what their status is, whether they're active/inactive.

You can look at that on an individual subscriber basis. You can go into a list and look at all the individual people who are subscribed to that list, but you can't currently filter by active or inactive specifically.

Is there a way to modify users in bulk? (00:33:34)

Jerod: And then, finally, question 8B from Lucas, "Is there a way to modify users in bulk?" And the answer here is that there is currently no way to modify users in bulk. So no way to do that currently.

Chris: Not yourself.

Jerod: Anything else to add to that, Chris?

Chris: Yeah, you could contact Support and ask if that's a service we could do for you. But you can't do it yourself, currently in bulk.

Jerod: That's true. That is true. So, that actually brings us to the end of the questions that we had submitted ahead of time. I haven't had a chance to look in the question box yet, Chris. Is there anything in there?

Chris: I think we've covered everything else we've gone through. I've been looking.

Can you manually tag people? (00:34:11)

Chris: Nicholas asked, "Can you manually tag people?" And yes, yes you can. That's a recent feature. You can both tag people and you can add notes if they're subscribed. And one of the reasons for that is people were asking about being able to use their list almost like a contact database, and being able to say, "Okay, I spoke to this customer on Wednesday and he's interested in the deal, but needs to talk to his CFO."

You know, that kind of thing, when you're actually talking to people. Or, you can make a note like, "This subscriber seems to have a typo in his email address." You know, that kind of thing. So, you can tag people. You go into the 'Subscriber Management' screen, and you can select from your existing tags, and you can add the tag, and there's a notes box underneath as well. And then you click, 'Update Subscriber,' and it'll save that away.

You could actually manually go through and tag people so that you're picking out people who might be a special audience, you know? Like, best customers. Or people who signed up before the promo in January. That kind of thing.

How would an autoresponder be sent to people once they've completed a course? (00:35:32)

Jerod: So, Nicholas has a question. "How would an autoresponder be sent to people once they've completed a course?"

There's a few different ways I think you could slice this question but probably the easiest way would be, you know, if someone's going to be inside of your site consuming your course material, my assumption is that they have to be logged in.

If they're logged in, now you can use marketing automation with these folks. And so, if you have a page that people get to when they complete a course, so, maybe it's a redirect page from a quiz, or it's just the last page of the course lesson, or you have a congratulations page there at the end of the course that people go to. Well, by going to that page, you can actually trigger that person being added to an autoresponder. And so you could add them to the course completion autoresponder, and at the same time remove them from the main course autoresponder if you wanted to. So that would be one way to do it.

If you're dripping out your course lessons and you have an autoresponder that is in sync with that, to let people know when the new lessons are available, which is always a good plan for a course, then you can of course just extend autoresponder messages past the drip dates when the lessons become open.

Then at that point, people may have completed it. You can use it to maybe remind folks if they haven't completed it. So it's kinda going to depend on how you want to set that up. But I think, probably the first method of using marketing automation once they get to a specific page, if you want to make sure they've completed the course, that's probably the best way to sync that event up with an autoresponder.

Chris: Yeah. And sometimes courses have a certificate of completion. So you could have a form, and then after submitting the form it takes them to a confirmation screen. A thank you screen. And you could tag them on the thank you screen and use automation on that page. So that would be a nice way of getting them to explicitly say, "I have completed this course, because I want a certificate of completion." The challenge with just hitting a page. Okay, so you might have Lesson 10. Just hitting Lesson 10 doesn't necessarily mean they've consumed Lesson 10. It's a proxy for that.

Does redirecting to a page after a quiz automatically tag them? (00:37:49)

Jerod: Then Nicholas asked, "Does redirecting to a page after a quiz automatically tag them?" So, it can. And the way that you would do that, Nicholas, is on the redirect page that you're going to send people after the quiz, you would add the tag. So, whatever your tag is, you know, "quiz completed," or whatever it is. Make sure that tag is on that page, and then when they are redirected to that page they will be tagged. So it doesn't automatically tag them just by default by setting up a quiz. But, if you go in and add the tag to the redirect page, get that set up, now it will automatically tag people moving forward from that point.

Chris: Yeah, and that's what Amelia says. You could have a link or a button on the page on the last lesson that says, "I've completed this." And then you could use marketing automation based on that link.

Jerod: Yep. You're kind of, at that point, trusting people that they've actually completed it. But that's, I think we can trust people. Err on the side of trusting people.

Chris: Yeah. People are basically good, right?

Jerod: I think so. I think so. And, we appreciate all of the questions. Thank you very much for sending in your questions, and for being here today. I think with that said, no more questions are coming in, so let's wrap up for the day, Chris. Always fun doing these sessions with you.

Chris: Always a pleasure.

Jerod: Always a pleasure. All right, have a great day everybody and good luck setting up your email with Rainmaker.