Seamless Opt-In Campaign Checklist

Quick reference to build a simple opt-in campaign in Simplero. Make a copy, work from top to bottom, and check things off as you go.
Start simple: For most opt-in campaigns, you only need a list, an opt-in page, a freebie (optional but encouraged), one welcome email, and a test.

Before You Build

- ☐ Decide what people are opting in for
  Example: PDF, checklist, webinar, replay, free course, coupon, waitlist, newsletter, etc
- ☐ Name your campaign clearly
  Example: “Free Meal Planning Guide” or “May Webinar Opt-In”
- ☐ Make sure your email basics are set. Settings > Email Settings: Check sender email + email domain.
- ☐ Check your account’s GDPR/data consent settings if needed. Settings > Account Settings > Privacy
- ☐ Add any custom fields you want saved on the contact record; Settings > Custom Fields

Create the List

- ☐ Contacts > Lists
- ☐ Create a new list if you have not already created one
- ☐ Add a name you’ll recognize
  - ☐ You can configure the internal name and public facing name to be separate if you choose later.
- ☐ Decide whether double opt-in is on or off
  - ☐ If double opt-in is on, review the confirmation email and customize if you’d like
- ☐ Customize list specific GDPR consent if you’d like

Add the Freebie or Access within the List’s Content tab

Use the options below that matches what you’re wanting to give subscribers.

- ☐ Use the lead magnet section to add files such as a PDF, audio, image, worksheet, etc.
- ☐ Grant access to sites, courses, podcasts, or bots as relevant

- ☐ **(optional)** Customize your list specific thank you page with either:
  - ☐ Custom thank you page content within the system generated page OR
  - ☐ Custom thank you page which will be an entirely different page you can customize and select.
- ☐ **(optional)** If using double opt-in, customize the confirmation required page. *This will be the page they see upon initial sign up submission.*

Build the Opt-In Page or Form

This is how they get opted in. Choose which type of form you would like to use:

- ☐ **Landing Page:** full page that can be a stand alone page, site page, or funnel page
  - ☐ Choose a template or start from scratch
  - ☐ Add the form fields you need. Name + email is usually enough.
    - ☐ Add any custom fields only if you truly need the info
      Note: Contact fields will be on the contact record
  - ☐ Set the button action to opt in.
    - ☐ Optional but encouraged: attach your list to the button
  - ☐ Override the thank-you page only if this form needs a different one
  - ☐ Review the design on desktop and mobile
- ☐ **Embedded Form:** Best when the form will live on another Simplero page or an outside website and can be placed on multiple different pages.
  - ☐ Select the general template
  - ☐ Customize the form content and add custom fields as needed. Email and name will automatically be included.
  - ☐ Review form settings for visibility settings and list connection
  - ☐ Copy embedded code from embedded tab and paste into an HTML element of a full landing page

Connect the Follow-Up

Simplest way is through the list. However can also be attached via the forms directly as well through triggers on the settings. .

Contacts > Lists > [Your List] > Automations

- ☐ Select your automation option: either a simple email flow with a number of emails of your choice, an existing automation, or one you build from scratch.
  - ☐ Include any files you want them to receive via email or any other links/ directions

- [ ] Continue updating the remainder of any follow up emails
- [ ] Make sure each email is active and send yourself a preview

Test the Flow

- [ ] Open the opt-in page in an incognito/private browser
- [ ] Sign up with a test email
  For Gmail, you can use: yourname+test1@gmail.com
- [ ] Confirm the subscription if double opt-in is on
- [ ] Verify the user experience is functioning as you intend it to

Optional Extras

Only add these if the campaign needs them.

- [ ] Add tags based on form choices
- [ ] Use a countdown timer for urgency such as for a deadline funnel
- [ ] Build the campaign as a funnel which can be great for additional offers
    - [ ] Add conditional paths

Common “Which One Do I Use?” Notes

- **Landing Page vs. Embedded Form**
  Use a landing page when you need a standalone link. Use an embedded form when the form goes on another page or outside website.
- **Automation Type:**
  - Simple email for a single email
  - Email sequence for multiple emails set to be sent 1 day apart (can be updated to be more spaced apart)
  - Existing automation for one you’ve built out already and want to reuse
  - Custom automation that is starting from scratch for that list
- **Default Thank-You Page vs. Custom Thank-You Page**
  Default is easiest for basic file delivery. Custom is best when you want a branded page, next-step offer, or more control on what your users see.
- **Double Opt-In**
  More confirmation, but more friction. If it’s on, people must confirm before they’re fully active or get additional emails from the list.
- **Custom fields:**
  Account level custom fields are great for things that are being consistently reused, necessary on the contact page, or typically stay consistent. Form specific fields work well for things you don’t necessarily need on the contact page or don’t want to have overwritten.