



ONBOARDING WITH ACT-ON



Great Marketing Automation Starts with the Right Plan to Accelerate Your Marketing Automation Success

We understand that your business is unique, and so are your reasons for purchasing marketing automation software. To ensure that you hit the ground running from day one, we'll work with you to customize your onboarding experience. Together, we will tackle your top priorities first.

Once you sign up to become an Act-On customer we'll ask you to identify the top 3-5 goals you'd like to get started on right away. We'll take those and build a customized action plan for you, to get you going. First you'll lay a foundation of technical items and integrations, and then move on to the fun stuff! Every few days we'll send you guidance and updates on your progress, and keep you pointed in the right direction with tips and best practices.

Your Onboarding Manager will check in with you as you complete your tasks to review the results of your campaigns, answer follow-up questions, help you improve your results, and ensure you're using all the resources available to you and your team.

Each Act-On subscription includes:

- **Customized** Onboarding Action plan
- **Check-in meetings** with your Onboarding Manager
- **Access to Act-On University:** Learning paths, feature guides, live training and workshop classes offered daily
- **Act-On Customer Community** access: Learn from your peers, ask questions and share ideas!
- **Act-On Support Team** for phone, web, and email inquiries



Want more than what you see here? We offer customized onboarding plans to address all of your needs both large and small. [Learn more](#) about what our Pro Services team can do to accelerate your onboarding results!

What is an Onboarding Manager?

Your Onboarding Manager is a highly trained Act-On expert here to accelerate your onboarding success. They understand how to maximize your campaign engagement, can show you new areas of Act-On to explore, and will share cool ways to wow your customers and prospects using automation as the foundation.



As you work through your customized Onboarding Action plan, your Onboarding Manager will check in with you periodically to review your usage of the platform, ask about results of the campaigns you're launching, show you new tools to optimize the success of your programs, introduce you to additional training resources, and answer those burning questions that keep you up at night. Think of us as your marketing automation coach. We are here for you, helping you improve continuously so you get more from your marketing automation investment.

What can you expect during the Onboarding Process?

1	First Step – sign up with Act-On!
2	Receive a welcome email and phone call from Act-On's Customer Success Team
3	Create a customized Onboarding Action plan – Select 3-5 goals from any of these focus categories): <ul style="list-style-type: none">• Attract more visitors• Capture visitors as prospects• Nurture prospects into leads• Convert leads to customers• Expand your customer footprint
4	You will receive an email with your customized Onboarding Action plan
5	Technical recommendations completed (week 1)
6	Complete goals 1-5 (complete 1 per week to stay on track!)
7	Onboarding check-in call: <ul style="list-style-type: none">• Technical check-in• Goal 1: Completion check-in• Goals 2-4: Completion check-ins, one for each• Goal 5: Completion check-in and graduation

About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more