



ACTIVE CAMPAIGN PARTNERSHIP

Tailor-Made Automation, Email Marketing, and Sales Engagement System

Automatically send email and text drip campaigns, manage leads from all sources instantly, and understand your customer acquisition cost by marketing channel.

What it's done for a client:

7,000+

Lost Leads
Uncovered

230+

Leads Re-Engaged
Monthly

100%

Leads Tracked
from Start to
Finish

Why purchase Active Campaign through our Agency?

They say you get what you pay for. Advisor Guide Marketing's proven system works for Financial Advisors just like you to customize, train, and onboard marketing departments to Active Campaign.

We've had many advisors approach us about their confusing and complicated Marketing Softwares, wishing they had built a good foundation from the beginning.



ActiveCampaign >

— OFFICIAL —

Agency
Partner

WHO IS THIS FOR?

Built for Advisors

Our Active Campaign Buildout is for companies that want to improve their lead and customer experience with:

- ✓ Automated email and text touchpoints that keep your leads and clients engaged
- ✓ A cost-effective, easy to use solution
- ✓ Top-tier tools for every aspect of your marketing



ACTIVE CAMPAIGN

What's Included?

Automated Drip Campaigns

Assign Tasks and Follow Ups

Email & Newsletter Campaigns

Understand Real Time KPI's

Reporting and Analytics

Unlimited Automations

900+ Integrations

A/B Testing

Attribution & Conversion Tracking

Generative AI

Site Tracking

Landing Pages

Revenue Reporting

Predictive Sending



OUR SERVICES

Templates Built for Financial Advisors



Landing Pages

Create, deploy, and track your landing pages with the ActiveCampaign platform. It's everything you need to get up and running instantly.



Email Drip Campaigns

Create flawless emails in minutes with drag-and-drop design tools and over 250 pre-built templates.



Contact Forms

Effortlessly create and embed forms across your ActiveCampaign landing pages and your own sites. We help you get the info you need to grow without disrupting the user journey.



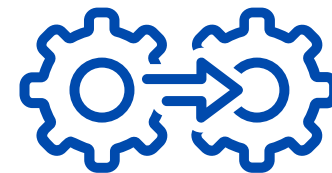
HOW DOES IT WORK?

Streamlined Setup



Can my team use Active Campaign Easily?

You don't need to be a developer or a designer to use ActiveCampaign. Anyone can create email marketing campaigns and marketing automations on the platform. Our team offers pre-built templates, live training calls, access to our client portal to ask questions and find helpful tips and tricks, and more!



Why do I need Active Campaign if I already have a CRM?

In most cases Active Campaign will not replace a Financial CRM like RedTail, Wealthbox, or Salesforce. Our instance of Active Campaign is designed to work seamlessly with these systems to transfer leads into your financial CRM once they book a meeting with your team. Active Campaign's primary focus is to market to your existing lead base and convert them to booked meetings.

WE HELP YOU

Build a Foundation from the Start



Live Training & Onboarding Tools

Our team is available to help you with strategy, automation, design and copywriting. Our live calls and video training cover every aspect of the Active Campaign system and it's use cases for Financial Advisors.



Customized Templates

Tired of generic templates from cheap marketing services? Our templates are built for the topics you want to talk about, like Taxes, Income Planning, Legacy Planning, Long Term Care Costs, Inflation and more!



Ongoing Coaching & Client Portal

We offer ongoing coaching and access to our Client Portal, where our Advisor Guide staff integrate seamlessly with your team to address real-time challenges and issues on a weekly or monthly basis.