STRETCHLEARN · WORKBOOK

ActiveCampaign Mastery — Workbook

This workbook turns the course into a build. Work through it inside your own ActiveCampaign account: every section maps to a module and asks you to design, configure, and test a real piece of your system. By the end you will have a documented scoring scheme, a working pipeline, and deal-stage-aware nurture you can run and hand off.

The Automation Builder, From Triggers to Conditions

Plan and build your first branching automation with a Goal, then prove each path works before trusting it.

Exercise: Map a Branching Welcome Automation on Paper

Before opening the builder, sketch the automation. Choose one entry trigger, set Runs to Once, and design at least one If/Else branch and one Goal that intercepts early converters. Write the contents of each email branch in one line.

- What single trigger starts this automation, and why is Runs set to Once?
- What yes/no question does your If/Else ask, and what does each branch send?
- What outcome does your Goal watch for, and where in the flow does it sit so it can intercept early?
- Where have you added a Wait-until time cap so no contact gets stuck forever?

Worksheet: Automation Build Specification

Fill this in for the automation you will actually build, then use it as your checklist inside the builder.

Automation name

Entry trigger (and Runs setting)

Step 1 action

First branch condition (If/Else or Wait-until)

Branch A path summary

Branch B path summary

Goal condition (outcome that skips ahead)

Exit / cleanup action (tag, end)

Checklist: Pre-Activation Test Checklist

[ ] Trigger Runs setting is correct (Once vs Multiple) for this use case
[ ] Added two test contacts and tagged only one to test the branch
[ ] Confirmed each test contact landed on the expected branch via live counts
[ ] Every Wait-until has a maximum-wait fallback path
[ ] Goal placed high enough to intercept early converters
[ ] Automation set to Active only after both branches passed the test

Lead Scoring That Surfaces Sales-Ready Contacts

Define a defensible point scheme, wire the sales handoff, and set up readiness segments you can report on.

Worksheet: Point Scheme Definition

Assign points to each behaviour, anchoring your highest value on the action that best predicts a sale. Leave the threshold blank until you have justified it in the prompt below.

Behaviour: opened any email — points

Behaviour: clicked a link — points

Behaviour: visited pricing/product page — points

Behaviour: submitted high-intent form — points

Behaviour: replied / booked meeting — points

Decay rule (points removed after how many inactive days)

Sales-ready threshold (score that triggers handoff)

Exercise: Design the Score-Threshold Handoff

Plan the automation that fires when a contact crosses your sales-ready threshold. It must act fast and fire only once per genuine qualification.

• What trigger fires the handoff, and at what score value?

• What guard (tag check or entry rule) prevents it re-firing as the score wobbles?

• What does your notification email include so the rep can decide to call in seconds?

• What deal or task is created, and who is assigned as owner?

Checklist: Scoring Health Checklist

[ ] Highest point value sits on a behaviour that genuinely predicts a sale
[ ] A decay rule reduces stale scores so Hot means current intent
[ ] Handoff automation guarded against duplicate notifications
[ ] Hot / Warm / Cold segments built and self-updating
[ ] Scheme documented in one place: every behaviour, points, and threshold meaning
[ ] Plan in place to compare Hot-segment conversion against Warm after a few weeks

The Built-In CRM and Deal Pipelines

Model your real sales process as observable stages, automate movement, and weight the pipeline for an honest forecast.

Worksheet: Pipeline and Stage Design

Define your pipeline using stages that name observable buyer actions, not internal feelings. Assign a default win probability to each stage.

Pipeline name

What a deal Value represents (one-off / first month / annual)

Stage 1 name + win probability

Stage 2 name + win probability

Stage 3 name + win probability

Stage 4 name + win probability

Custom deal fields to capture (e.g. Source, Plan, Close reason)

Default owner assignment rule (round-robin / by deal size)

Exercise: Automate One Stage End-to-End

Pick one stage (Proposal Sent works well) and design the automation that fires when a deal enters it, including the exit Goal that stops it on close.

- Which stage are you automating, and what triggers the automation?
- What sequence of emails and tasks fires when a deal enters this stage?
- What Goal ends the cadence when the deal becomes Won or Lost?
- How will you test this with a dummy deal before it touches real prospects?

Checklist: Pipeline Hygiene Checklist

[ ] Stages are observable buyer actions, not internal moods
[ ] Person facts stored on contact, sale facts stored on deal
[ ] Every deal has a value and an owner
[ ] Each stage cadence has an exit Goal that stops on Won/Lost
[ ] Stale deals (no movement in 30 days) are flagged for review
[ ] Close reason required on every Lost deal

Site Tracking, Events, and Deal-Stage Nurture

Connect behaviour to automations and assemble nurture that adapts to the contact's current deal stage.

Exercise: Plan Your Events and What They Trigger

List the custom events worth tracking from your site or product using a consistent naming scheme (lowercase, underscores, verb-then-noun). For each, state the automation it should fire.

- Which page visits are strong enough buying signals to trigger an automation?
- What three to five custom events matter, and what is each event's exact name?
- What should each event trigger (tag, score change, branch, notification)?
- Where will you keep the single document that defines every event name?

Worksheet: Deal-Stage Nurture Map

For each stage, define the nurture theme and the behavioural branch layered on top. Note the exit Goal for every selling cadence.

New / no deal — nurture theme

Demo Booked — nurture theme

Proposal Sent — nurture theme + exit Goal

Negotiation — nurture theme + exit Goal

Won — switch-to-onboarding actions

Lost — log reason + re-engagement plan

Behavioural branch used inside cadences (e.g. re-visited pricing?)

Checklist: Live System Governance Checklist

[ ] Site tracking installed on all pages and verified with a self-test visit
[ ] Event naming scheme documented and consistent
[ ] Only one automation emails a given contact about a given deal at a time
[ ] Every stage cadence exits cleanly via a Goal on close
[ ] Cold and unengaged contacts suppressed to protect deliverability
[ ] Monthly audit scheduled for automations, tags, and score drift

Your Action Plan

1. Build one branching welcome automation with Runs set correctly, an If/Else branch, and a Goal, then test both paths with two contacts before activating.
2. Write down your full point scheme: every behaviour, its points, a decay rule, and the sales-ready threshold, and store it in one document.
3. Configure lead scoring (editor rules plus Adjust score actions) and confirm the score updates on a test contact's behaviour.
4. Build the score-threshold handoff automation with a duplicate-fire guard, a useful notification,

and automatic deal/task creation.

5. Create Hot, Warm, and Cold segments from the score and add them to your reporting view.
6. Design your pipeline with observable stages and assign a default win probability to each stage.
7. Automate one deal stage end-to-end (trigger, emails, tasks, exit Goal) and test it with a dummy deal dragged through the board.
8. Install and verify site tracking, then build one page-visit automation (for example, pricing-page visit raises score and sends a follow-up).
9. Plan and name your custom events, document them, and wire at least one event to a relevant automation.
10. Assemble deal-stage-aware nurture with exit Goals everywhere, then schedule a monthly audit of automations, tags, and score drift.