



# Top 5 Ways to Leverage Subscription Management

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**Tatiana Lea**

Act-On Oldie

## Experience & History

- 14+ years experience in marketing
- 7+ years at Act-On
- Onboarded 100+ clients, run monthly training sessions, assist with strategy and delivery of various campaigns and projects including several Custom Preference Centres

## How can you reach me?

Ask your AM or CSM to schedule a meeting with me to discuss your use cases.



# What is Subscription Management?

The process of managing your prospects and customers' subscriptions and making sure that their experience with your product or service is a happy one.

*About 51% of people unsubscribe because they receive emails too often. Often, the content or lack of personalization within these high-frequency emails drives them to leave. When people complain about getting too many emails, they're really complaining about too many irrelevant emails*

*Source: [Litmus](#)*

**act-on**

Subscription Settings  
Manage subscription settings for {{VCard.Email}}. If this is not your email address, please ignore this page.

Subscription Interest  
Only send me communications for the following checked categories:

**Select / Unselect All**

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**Act-On Training**  
Receive product tips and tricks as well as notifications about upcoming training sessions.

**Events and Webinar Invites**  
Invitations to live in-person and virtual events. (Approx. 2/month)

**Marketing Education**  
Continue your marketing education and receive on-demand webinars, eBooks, and blog posts. (Approx. 2/week)

**Newsletter**  
Stay up-to-date with Act-On product news, events, training, and more! (Approx. 1/month)

**Press Releases**  
Be the first to receive our latest press releases and company news.

**Product Updates**  
Get notified as soon as new Act-On features and enhancements are available. (Approx. 2/month)

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Checking the box below will remove you from all future communications. Unchecking it will add you back to any future communications based on your settings above.

**Remove Me From All Future Communications**

[Update Settings](#)

# Benefits

- ✔ Increase engagement and inbox placement
- ✔ Lower Number of Complete Opt-outs
- ✔ Higher Engagement; Clicks and Opens
- ✔ Segment Based of Categories

# 5 Use Cases



# 1. Native Subscription Management

## How it works:

1. Access ONLY via EMAIL!!!  
The email recipient clicks the unsubscribe  
Or Update Email Preference link in the  
footer of the email
2. A new browser tab opens with a landing  
page that contains the Subscription  
Management form
3. The recipient selects the different email  
categories they would like to receive then  
submits the form
4. The Subscription Management list in  
Act-On will update the record with the  
selected categories and future emails will  
be suppressed for the categories the  
recipient is unsubscribed from.

The screenshot shows the Act-On logo at the top left. Below it, the text reads: "Thank you for your interest in 'Marketing Automation for Insurance Organizations'" followed by a blue link "Click Here to Download Your eBook".

The main content area features a "Growth Marketing Platform" graphic on the left, which includes icons for various marketing tools and a central play button. To the right of the graphic is a grey box with the text "Ready to Take Your Marketing to the Next Level?" and a blue button that says "Watch 2-Min Video".

Below the graphic and text is a row of social media icons for Facebook, Twitter, LinkedIn, Instagram, and YouTube.

At the bottom, there is a footer with two red-bordered buttons: "Update Email Preferences" and "Unsubscribe". To the right of these buttons are links for "Privacy Policy" and "No Images? Click Here". At the very bottom, the copyright notice reads: "© 2022 Act-On 121 SW Morrison Street, Suite 1600, Portland, OR 97204, United States".

# Optional Settings

### Response Format

Enable Message Format Choice (HTML / Plain Text)

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#### Update Settings Response Type

Act-On Landing Page Redirect ▼

[CUSTOM] Confirmation PAGE [Newsletter 

#### Complete Opt-Out Response Type

Act-On Landing Page Redirect ▼

Unsubscribe Form for Opt Outs 

## Response Format

### Settings and Opt-Out Response Type with 3 options:

1. Confirmation popup (when this is selected, you can customize the Confirmation Message that displays on the page)
2. Act-On Landing Page Redirect
3. URL Redirect

# Let's Dive in and Explore...

1. Native Subscription Management
2. Optional Settings

# 2. Native Subscription with Custom Stationary

**bswift**

## Subscription Settings

Manage subscription settings for tatiana.lea@act-on.com page.

### Subscription Interest

Only send me communications for the following checked categories:

- ALL bswift Communications
- Remove Me From All Future Commun

Upd

**analysis mason**

### Subscription Settings

Manage subscription settings for tanuscha.l@gmail.com. If this is not your email address, please ignore this page.

#### Subscription Interest

Only send me communications for the following checked categories:

- Customer Newsletter
- Product Update
- Virtual Events
- Critical Communications

Checking the box below will remove you from all future communications. Unchecking it will add you back to any future communications based on your settings above.

- Remove Me From All Future Communications

**Update Settings**

Copyright © 2022 Agency One and Two  
Our address is Caversham, Reading, Berkshire, RG4 5BW, United Kingdom

**Manage my email preferences**

Manage subscription settings for tatiana.lea@act-on.com. If this is not your email address, please ignore this page.

**Stay up to date with all the latest and greatest from LCP:**  
Choose what emails you'd like to receive from us. Only send me communications for the following checked categories:

Select / Unselect All

#### LCP Services

- DC pensions
- DB pensions
- De-risking
- Energy
- Financial wellbeing
- Health analytics
- Insurance
- Investment
- Pensions investment
- Technology & analytics

#### Topics and interest

- Corporate finance
- ESG (Environment social governance)
- Industry insights
- Personal finance
- Policy papers
- Regulatory developments
- Research and new thinking
- Trending on our website
- Weekly pensions bulletin

#### About us

- Environment
- LGBT + network
- Multicultural network
- News about LCP
- Womens network

Checking the box below will remove you from all future communications. Unchecking it will add you back to any future communications based on your settings above.

- Remove Me From All Future Communications

**Update Settings**

Page 0208

Privacy Policy • Legal notices • Information security • Modern Slavery Act statement • Email preference centre • Accessibility

## 2. Native Subscription with Custom Stationery

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Access ONLY via EMAIL still (!) but more alignment with brand colours/type/look and feel.

Stationery wraps around the content created within the Message Composer, Landing Pages, Subscription Management Centre.

- Once a Stationery is created, the custom HTML, CSS, and Javascript (if applicable) are always available for all Act-On content. Your organization's distinctive designs do not need to be re-generated for each successive email or landing page.
- Custom CSS contained within your Stationery will always be applied to the content that the Stationery wraps. This includes advanced CSS, such as responsive-design frameworks.
- Stationery prevents more complex designs and layouts from being accidentally modified by other Act-On users.

**Let's  
Dive in  
and  
Explore...**

1. Subscription Management with Custom Stationary

# 3. Custom Email Preference on the Website

How it works:

1. Access via Website  
Website visitor finds a button/CTA on the website to manage email preference or sign up for the 1st time
2. Form is created in Act-On and either embedded on Act-On Landing page or web page
3. When options are selected, data from submissions can be [directly written into Act-On Subscription Management List](#) or using [List Maintenance Program we can do that later.](#)

**Manage Your Communication Preferences**

Update your preferences with this form. Requests can take up to 24hrs to process.

First Name  
First Name

Last Name  
Last Name

Email Address \*  
Email Address

What topic(s) do you want to receive emails about?

Release Notes \*  
 Yes  No

Promotions \*  
 Yes  No

Newsletters \*  
 Yes  No

First Name

Last Name

Email

eNewsletter - tick if you want to subscribe  
 Newsletter

Promotions - tick if you want to subscribe  
 Promotions

Product Updates - tick if you want to subscribe  
 Product Updates

Submit

**Let's  
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and  
Explore...**

1. Custom Email Preference on the Website

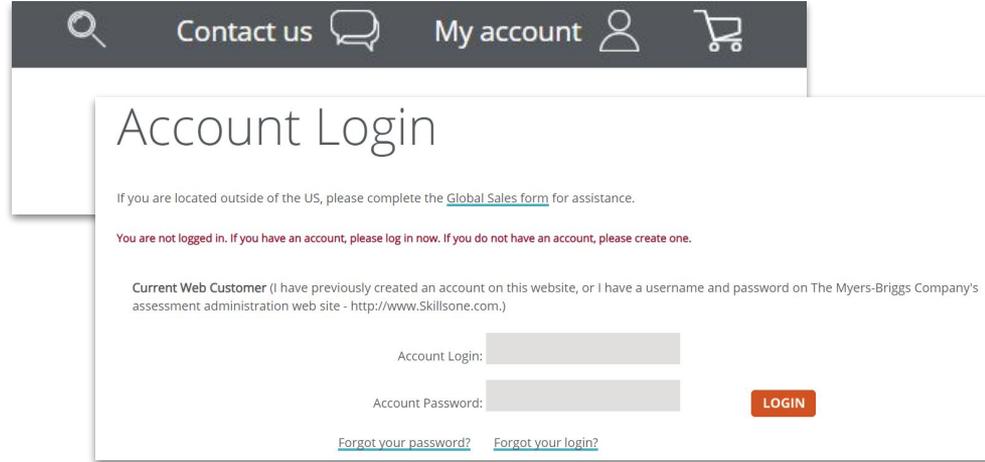
# 4. Custom Email Preference on User Portal

How it works:

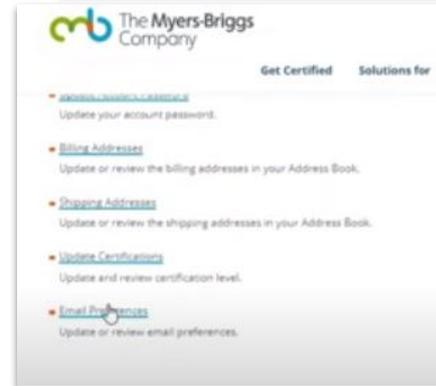
1. Access via website portal, login, go to Email Preference:
  - a) Give consent
  - b) Unsubscribe
2. Form is created in Act-On and either embedded on website/portal page or via external posting connect two forms to capture submissions in Act-On

*a) Anyone who gave consent we will send email with CTA - go to Subscription Management and select types of communication you would like to receive*

*b) Unsubscribe we will add to Opt-Out list via a step in automation program*



The screenshot shows the 'Account Login' page. At the top, there is a navigation bar with a search icon, 'Contact us', a chat bubble icon, 'My account', a user profile icon, and a shopping cart icon. The main heading is 'Account Login'. Below the heading, there is a note: 'If you are located outside of the US, please complete the [Global Sales form](#) for assistance.' A message follows: 'You are not logged in. If you have an account, please log in now. If you do not have an account, please create one.' Below this, there is a section for 'Current Web Customer' with a note: '(I have previously created an account on this website, or I have a username and password on The Myers-Briggs Company's assessment administration web site - <http://www.Skillsone.com>.)'. There are two input fields: 'Account Login:' and 'Account Password:'. To the right of the password field is a red 'LOGIN' button. At the bottom, there are two links: '[Forgot your password?](#)' and '[Forgot your login?](#)'.



The screenshot shows the 'Account Management' page. At the top, there is the 'The Myers-Briggs Company' logo and the text 'Get Certified Solutions for'. Below this, there is a list of account management options, each with a red arrow icon and a blue link:

- [Account Settings](#)  
Update your account password.
- [Billing Addresses](#)  
Update or review the billing addresses in your Address Book.
- [Shipping Addresses](#)  
Update or review the shipping addresses in your Address Book.
- [Update Certifications](#)  
Update and review certification level.
- [Email Preferences](#)  
Update or review email preferences.

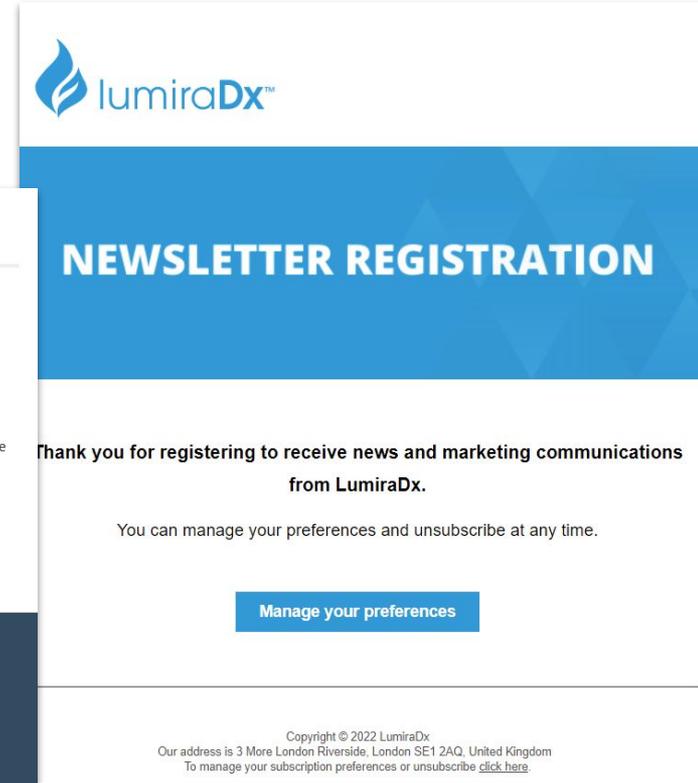
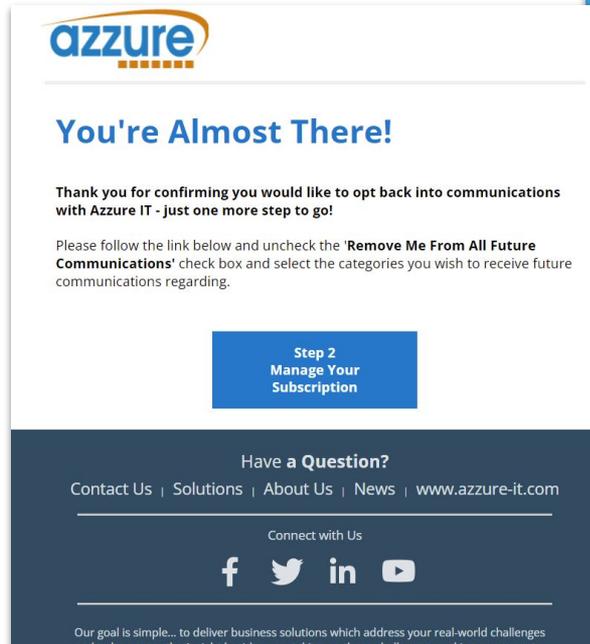
**Let's  
Dive in  
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Explore...**

1. Custom Email Preference on User Portal

# 5. Form Confirmation Email to Manage Preferences

How it works:

1. Sign up for Newsletter or Complete Opt-Back-In request via website
2. Email Confirmation on the back of Form Submission is send with CTA to Native Subscription Management



**Let's  
Dive in  
and  
Explore...**

1. Form Confirmation Email to Manage Preferences

***Thank you for joining me!***

