

Welcome to Ascent360! We are thrilled to partner with you as you get started making the most of your data. It is estimated that this checklist will require **8 hours of your time** during your 30 days of onboarding. This checklist will help you make sure you're on the right track as you onboard with Ascent360.

In this article:

- Pre-Onboarding (Estimation 1 hour)
- Week 1: Becoming Familiar with the Ascent360 Platform (Estimation 2 hours)
- Week 2 – Getting your 3 Standard Campaigns Live (Estimation 3 hours)
- Week 3: Reporting Metrics + New Audiences (Estimation 2 hours)
- Week 4: Finalize Campaigns + Ask Final Questions

Pre-Onboarding (*Estimation 1 hour*)

- Update your billing address and payment method for Ascent360
- Historical Lists (*Estimation 30 minutes*)
 - Upload any historical email lists from previous mailing platforms. Examples of lists are your Mailchimp unsubscribe list, MailChimp subscribe form lists, or any event lists that you may have
 - Resources: [Data Load Requests \(ascent360.com\)](#)
- Optional: Platform Orientation Video (*Estimation 25 minutes*)
 - Watch our "Platform Orientation Video". This is a generic 25-minute video designed to get you familiar with the platform before your first call with your onboarding manager.
 - [Getting Started: Platform Orientation | Ascent360 KnowledgeBase](#)

Week 1: Becoming Familiar with the Ascent360 Platform (*Estimation 2 hours*)

- Edit your Welcome Email (*Estimation 1 hour*)
 - Your Welcome Email draft is in the platform ready for you to edit. We recommend editing your branding colors, customizing your copy, and creating a product row to highlight some of your top products.
 - Resources: [Getting Started: Designing an Email in Ascent360](#)
- Save your own Email Template and Rows (*Estimation Less than 1 minute*)
 - While you are creating your own saved branded email template to create new email designs from as well as rows that you can reuse in the future
 - Resources: [Email Designer: Template Library \(ascent360.com\)](#)
- Optional: Upload Images (*Estimation 15 minutes*)
 - Upload your images to your Ascent360 Image Library. This can be found in the menu under Email >

Images

- Resources: [Upload an Image | Ascent360 KnowledgeBase](#)
- Set up your Landing Page (*Estimation 30 minutes*)
 - Your landing page is your form to collect new email sign-ups. This page can be embedded on your website, or you can link to the page. It is important to utilize your Ascent360 landing page, so all your new contacts come into the Ascent360 Platform. We have created a standard template for you to get started.
 - Resources: [Ascent360 Landing Page Builder Overview | Ascent360 KnowledgeBase](#)
- Embed your Landing Page (*Estimation 30 minutes*)
 - If you have a 3rd party managing your website, reach out to your contact and let them know that you would like to embed a new form. Otherwise, you can embed this form yourself.
 - Resources: [Ascent360 Landing Page Builder Overview | Ascent360 KnowledgeBase](#)

Week 2 – Getting your 3 Standard Campaigns Live (Estimation 3 hours)

- Send Your Welcome Email (*Estimation 30 minutes*)
 - Once you are finished editing your design, your email is ready to be sent. We have created the audience to send this email to “Welcome Train 1”. You can send this daily recurring email on your own or set up time with your onboarding manager to send the email together.
 - Resources: [Getting Started: Sending an Email | Ascent360 KnowledgeBase](#)
- Create an audience for your one-time/ad-hoc email sends. (*Estimation 20 minutes*)
 - Ascent360 has a pre-built Newsletter Contact List that brings in customers that have interacted with you in the last 2 years. Check out this audience and see if it serves your business needs. If not, try creating a new audience.
 - Resources: [Creating an Audience | Ascent360 KnowledgeBase](#)
- Edit and send your Lapsed Customer Email (*Estimation 1 Hour*)
 - Resources: [Getting Started: Sending an Email | Ascent360 KnowledgeBase](#)
- Edit and send your Prospect Conversion Email (*Estimation 1 Hour*)
 - Resources: [Getting Started: Sending an Email | Ascent360 KnowledgeBase](#)

Week 3: Reporting Metrics + New Audiences (Estimation 2 hours)

- Brainstorm New Campaigns (*Estimation 1-2 Hours*)
 - Now that you have your 3 Standard campaigns live, you are ready to start exploring other ad-hoc or campaign ideas. Brainstorm and discuss other campaign ideas with your onboarding manager. Some great examples are specialized Post Purchase emails, emails for your high-value customers, and cross-selling.
 - Remember the steps of an email campaign

1. Create the Audience
2. Design the Email
3. Send the Email
4. Optional: Campaigns
 - Email Reporting (*Estimation 30 min*)
 - Now that you have a few emails up and running, it is time to familiarize yourself with the reporting available within Ascent360.
 - Resources: [Email Reporting | Ascent360 KnowledgeBase](#)

Week 4: Finalize Campaigns + Ask Final Questions

This is your final week in the Ascent360 Onboarding period. At this time, you should have:

1. Your Ascent360 Landing page published and collecting your new email sign ups
2. 3 Standard Campaigns live (Welcome, Prospect Conversion, and Lapsed)
3. An understanding of the Audience Builder and how to build new audiences
4. An audience ready for your newsletter/ad-hoc sends
5. An understanding of your email designer and how to build new emails
6. Your own saved branded email template to create new email designs from
7. Saved Rows (Header, Footer, Product Rows)
8. An understanding of the Ascent360 email reports
9. More campaign/email ideas ready to be built!