



Email

StepByStep@route.to

Password

Log In



THE
BEGINNERS
GUIDE

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WELCOME TO ROUTE

We are glad that you're interested in our **Marketing Automation Software**.

Route will help you grow your business by providing the features you need to do **Lead Nurturing, Lead Scoring** and **Lead Management**.

Join the world of **Marketing Automation** now!

1

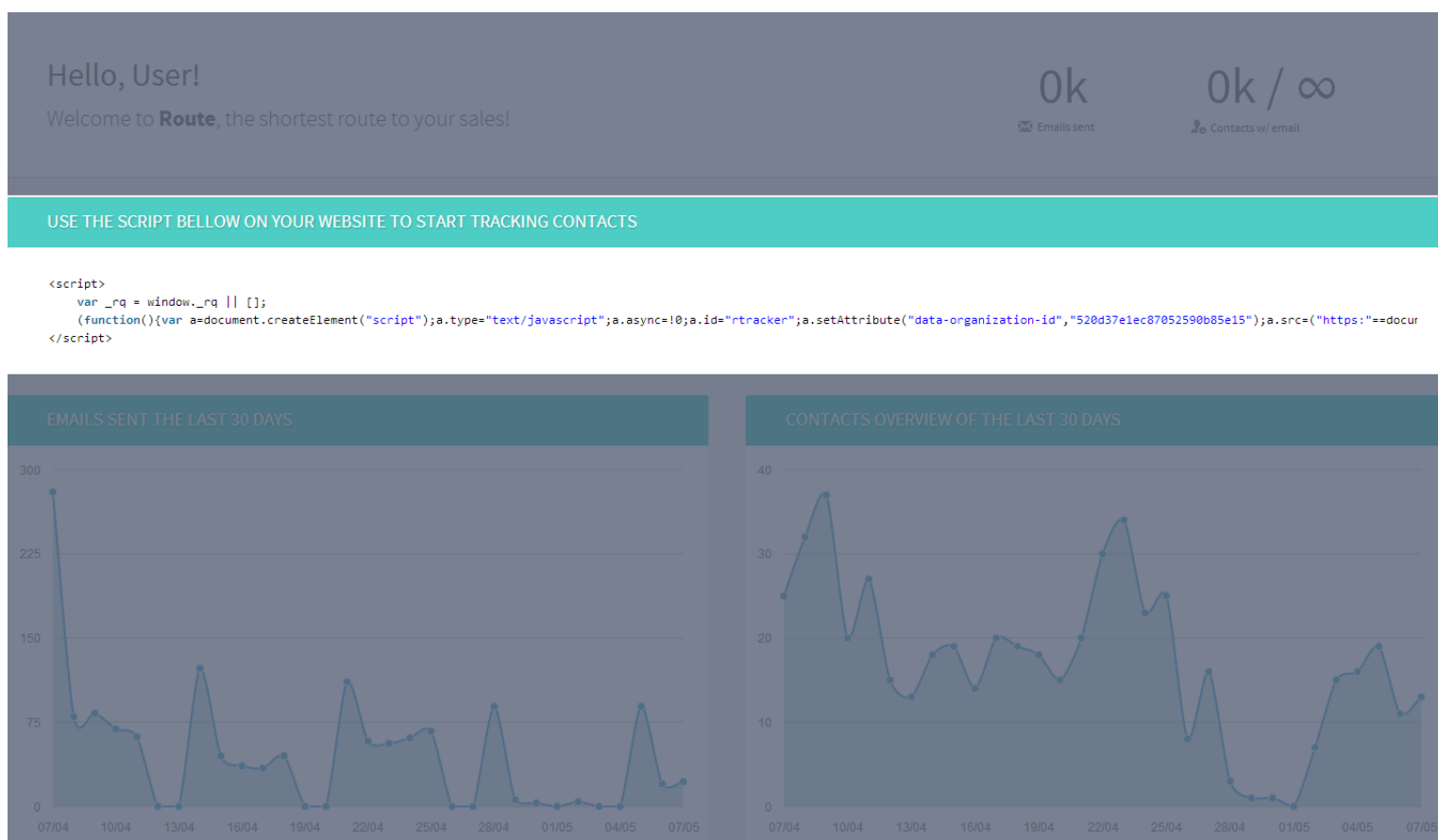
INSTALL THE MAIN TRACKING SCRIPT

```
<script>
var _rq = window._rq || [];
(function(){var a=document.createElement("script");
a.type="text/javascript";a.async=!0;a.id="rtracker";a.setAttribute
("data-organization-id","Your-Organization-ID");
a.src=("https:"==document.location.protocol?"https://":"http://")
+"www.routecdn.com/tracker/route-tracker-min.js";
var b=document.getElementsByTagName("script")[0];
b.parentNode.insertBefore(a,b)}}());
</script>
```

Step 1

So, you've done all the steps after your first log in, haven't you? Yes!? **That's great!** No!? Take a look at the **email we've sent you after your registration** and you'll find help to the first steps that you need to go through after signing up. We'll wait... Now let's begin.

This is how your home screen looks like:



There you can find information about the emails you've sent and the number of contacts you have. There is also the **tracking script** you need to put in every page of your website.

Step 1

EXAMPLE #1 - INSTALLATION

Your **first step** is to **install the script in every page** of the website you want to track.

If you **don't** do this, **Route won't collect the data** about the people visiting your website and, therefore, won't be able to perform the automations you create.

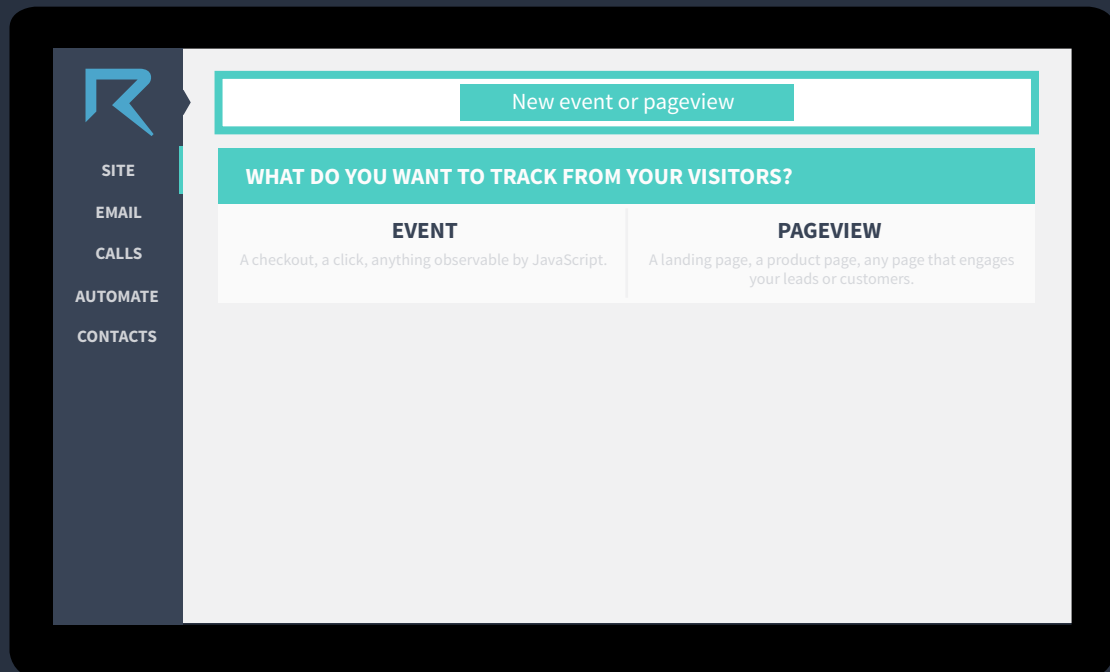
Here's an exemple:

```
1 <!DOCTYPE html>
2 <head>
3   <meta charset="utf-8">
4   <meta http-equiv="X-UA-Compatible" content="IE=edge">
5   <meta name="viewport" content="width=device-width, initial-scale=1">
6   <title>This Is A Website</title>
7 </head>
8 <body>
9   <h1 class="text-center">The Website's Content</h1>
10   <!-- Here there are all the contents in the website -->
11
12   <!-- ROUTE JAVASCRIPT -->
13   <script>
14     var _rq = window._rq || [];
15     (function(){var a=document.createElement("script");a.type="text/javascript";a.async=!0;a.id="rtracker";a.set
      Attribute("data-organization-id","Your-Organization-ID");a.src=("https:"==document.location.protocol?"
      https://":"http://")+ "www.routecdn.com/tracker/route-tracker-min.js";var b=document.getElementsByTagName("
      script")[0];b.parentNode.insertBefore(a,b)}());
16   </script>
17 </body>
18 </html>
```

We recommend to put the tracking script just before the tag `</body>`.

2

CREATE THE EVENTS TO AUTOMATE



Step 2

You can create two types of events: **site events** and **pageview events**.

SITE EVENT

Any event that is observable by JavaScript that is important to your business. Some examples of events you can track:

- ♦ A click on a link;
- ♦ A checkout process of a client;
- ♦ A download of an Ebook.

The screenshot displays the 'Event Example' configuration page in the Route Analytics dashboard. The left sidebar contains navigation links: SITE, EMAILS, CALLS, AUTOMATE, and CONTACTS. The main content area is titled 'Event Example' and includes a search bar. Below the title, there's a section for 'EVENT' with a description: 'A checkout, a click, anything observable by Javascript.' A teal banner instructs users to 'INSTALL THE SCRIPT BELLOW ON YOUR WEBSITE TO BE ABLE TO USE ROUTE'. Below this, a code block shows the JavaScript script for tracking the event. Further down, a section titled 'WHEN VISITORS TRIGGER THIS, YOU CAN...' offers options to 'Increment their score by...' (set to 0), 'Segment them in...' (with an empty input field), and 'Make them...' (set to 'STAY AT THEIR CURRENT STAGE'). A 'Keep scoring' checkbox is also present. A 'SAVE' button is located at the bottom right. The bottom of the interface includes a 'NEW EVENT OR PAGEVIEW' button and a 'Take a tour!' link.

Event Example

EVENT

A checkout, a click, anything observable by Javascript.

INSTALL THE SCRIPT BELLOW ON YOUR WEBSITE TO BE ABLE TO USE ROUTE

```
<script>
var _rq = window._rq || [];
_rq.push(['trackEventById', '540deae4ab3e381e887a9465']);

//In order to capture a contact to Route, call push passing 'updateContact' and the contact
//var contact = { name: name, email: email };
//call push passing 'updateContact' and the contact
//to make sure that the contact will be added or updated.
//_rq.push(['updateContact', contact]);
</script>
```

WHEN VISITORS TRIGGER THIS, YOU CAN...

Increment their score by... 0 ☐ Keep scoring

Segment them in...

Make them... STAY AT THEIR CURRENT STAGE

SAVE

NEW EVENT OR PAGEVIEW

Take a tour!

Step 2

EXAMPLE #2 - SITE EVENT

Imagine a company that has a specific page for the content they create. It's the "Resources" page and there you can find articles, whitepapers, infographics, slide decks and Ebooks.

The Ebooks are about Social Media Marketing, SEO and Inbound Marketing. The company creates an event to track the downloads.

Someone got interested and decided to download one Ebook about SEO.

The company is tracking the downloads of this Ebook and now Route knows who downloaded this material and it's possible to create an automation to Nurture this contact sending more content related to SEO.

Step 2

PAGEVIEW EVENT

A pageview event will be triggered everytime someone access a page with an URL that's being tracked. Some examples of pageview events:

- ♦ A landing page for a seminar subscription;
- ♦ A product page;
- ♦ A pricing page.

The screenshot shows the HubSpot Events configuration interface. On the left is a dark sidebar with navigation links: SITE, EMAILS, CALLS, AUTOMATE, and CONTACTS. Below these are icons for settings and a plus sign. The main content area is titled 'Pageview Example' and contains the following sections:

- Search:** A search bar with the placeholder text 'Search'.
- Events (1):** A list of events with one entry, 'Events Example'.
- Pageviews (1):** A list of pageviews with one entry, 'Pageview Example'.
- Event Configuration:**
 - NAME:** 'PAGEVIEW' (in teal).
 - DESCRIPTION:** 'A landing page, a product page, any page that engages your leads or customers.'
 - WHEN VISITORS ACCESS ONE OF THE URLS ABOVE...:**
 - URLs from:** 'HTTP://YOURCOMPANY.COM' (dropdown).
 - That:** 'ARE EQUAL' (dropdown).
 - The following value:** '/pricing' (text input).
 - ADD CONDITION:** A button with a plus icon.
 - WHEN VISITORS TRIGGER THIS, YOU CAN...:**
 - Increment their score by...:** '0' (dropdown) with a checkbox for 'Keep scoring'.
 - Segment them in...:** An empty text input field.
 - Make them...:** '2 - TRIAL' (dropdown).
 - SAVE:** A blue button in the bottom right corner.

At the bottom of the sidebar, there is a button labeled 'NEW EVENT OR PAGEVIEW' and a link labeled '? Take a tour!'.

Step 2

PAGEVIEW EVENT

In order to create a pageview event, you'll need to set the URLs you want to track. This option is under **Settings > Organization > Add URL**.

The URL you provided during the registration is already there.

HERE YOU CAN TYPE DOMAINS THAT YOU WISH TO KEEP TRACK WITH SITE EVENTS

http://yourcompany.com

http://www.yourcompany.com

yourcompany.com/blog

+ ADD NEW DOMAIN

Step 2

EXAMPLE #3 - PAGEVIEW

The same company of the previous example has a Pricing page and knows that is important to track customers that access it.

Their Marketing and Sales team know that the probability of a customer to be interested in their product is higher on those who visit this specific page.

Tracking the pageviews on the Pricing page allows the company to create automations sending messages to engage the visitors and help them to make a decision in buying their product.

3

INSTALL THE EVENT TRACKING SCRIPT

```
<script>
```

```
var _rq = window._rq || [];
```

```
_rq.push(['trackEventById', 'Your-Event-ID']);
```

```
//In order to capture a contact to Route,  
call push passing 'updateContact' and the contact  
//var contact = { name: name, email: email };  
//call push passing 'updateContact' and the contact  
//to make sure that the contact will be added or updated.  
//_rq.push(['updateContact', contact]);
```

```
</script>
```

Step 3

When you create an event, Route generates a JavaScript that you have to put in your website to trigger the event.

This codes will **identify all the events** you've created and make them **work properly**.

Here's an example:

```
1 <!DOCTYPE html>
2 <html lang="">
3   <head>
4     <meta charset="utf-8">
5     <meta http-equiv="X-UA-Compatible" content="IE=edge">
6     <meta name="viewport" content="width=device-width, initial-scale=1">
7     <title>This Is A Website</title>
8     <style>
9       .button {height: 65px; width: 200px; border:1px solid #469df5; background-color:#79bbff; display:inline-block; color:#ffffff;
10        text-decoration: none; font-family:Arial; line-height:65px; text-align:center; display:inline-block;}
11     </style>
12   </head>
13   <body>
14     <h1 class="text-center">The Website's Content</h1>
15     <!-- Here there are all the contents in the website -->
16
17     <!-- TRACKING A BUTTON CLICK-->
18     <a href="route.to/content/DownloadEbook" target="_blank" class="button" onclick="callRoute();">Download The Ebook</a>
19     <!-- BUTTON END -->
20
21     <!-- ROUTE MAIN SCRIPT -->
22     <script>
23       var _rq = window._rq || [];
24       (function){var a=document.createElement("script");a.type="text/javascript";a.async=!0;a.id="rtracker";a.setAttribute("data-
25         organization-id","Your-Organization-ID");a.src=("https://"==document.location.protocol?"https://":"http://")+www.routecdn.com/
26         tracker/route-tracker-min.js";var b=document.getElementsByTagName("script")[0];b.parentNode.insertBefore(a,b)}());
27     </script>
28     <!-- ROUTE MAIN SCRIPT END -->
29
30     <!-- ROUTE EVENT DOWNLOAD SCRIPT -->
31     <script>
32       function callRoute(){
33         var _rq = window._rq || [];
34         _rq.push(['trackEventById', 'Download-Ebook-Event-ID']);
35       }
36     </script>
37     <!-- ROUTE EVENT DOWNLOAD SCRIPT END -->
38   </body>
39 </html>
```

4

SET THE SCORE, SEGMENT AND STAGE



Step 4

If you want to take full advantage of **Route** we recommend you setting **scores**, **segments** and **stages** on every event that you create.

Remember that before doing this you should **prepare your business strategy** to know exactly what to expect.

If you don't want to do it now, you can jump to the **step 5** of our guide. Otherwise, continue reading.

By setting the scores, segments and stages you will be able to **differentiate the contacts you track, improving your Lead Management and your Lead Nurturing campaigns.**

SCORE

For every event you create it's possible to choose a **score that the visitor will get for performing that specific event**. The idea of scoring the contacts is to show the ones that are more engaged and have more probability to become a customer.

But before setting scores to your events, **get together with your Sales team** (or just by yourself if you're an one-man-company) **and think your strategy through.**

Step 4

EXAMPLE #4 - SCORE

After creating the Lead Scoring strategy, the Marketing and Sales team of the company decided that every person that becomes a customer will get **100 points***.

WHEN VISITORS TRIGGER THIS, YOU CAN...

Increment their score by...	Segment them in...	Make them...
100	STARTUP PLAN	3 - CUSTOMER

100 points is the top score so it should be used only for those events that are triggered by an important behavior of your contacts. **What's more important than becoming a customer?**

*The scores in Route were decided using the “Planning Poker” methodology.
The scores are:

-100 -40 -20 -13 -8 -5 -3 -2 -1 0 1 2 3 5 8 13 20 40 100

Step 4

SEGMENT

Creating a segment lets the company differentiate the contacts according to the interests they have in your company or based on the type of clients they are.

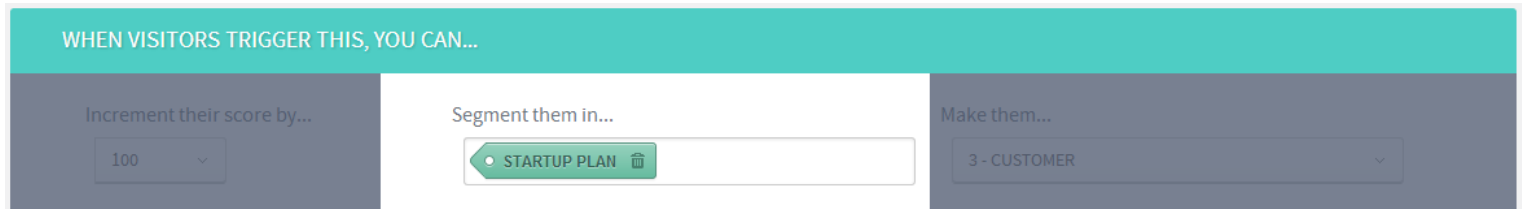
It's a way of assigning the contacts to more specialized sellers of your company.

This way you can have different Sales teams focusing on different products you might have.

Step 4

EXAMPLE #5 - SEGMENT

The customer in our last example bought a Startup Plan. The company has **4 different plans** to offer: **Trial**, **Startup**, **Pro** and **Enterprise**.



WHEN VISITORS TRIGGER THIS, YOU CAN...

Increment their score by...	Segment them in...	Make them...
100	STARTUP PLAN	3 - CUSTOMER

The screenshot shows a configuration interface for a segmentation rule. It has a teal header bar with the text "WHEN VISITORS TRIGGER THIS, YOU CAN...". Below this are three columns. The first column, "Increment their score by...", contains a dropdown menu with the value "100". The second column, "Segment them in...", contains a text input field with a green tag labeled "STARTUP PLAN" and a trash icon. The third column, "Make them...", contains a dropdown menu with the value "3 - CUSTOMER".

They've created segments for each plan, so now the customer is in the **"Startup Plan"** segment.

Step 4

STAGE

The stages you create must be related to your sales funnel. So, before naming each stage you need to **think about how you're going to divide the top of the funnel contacts, the middle of the funnel contacts and the bottom of the funnel contacts.**

Usually the contacts are labeled as Visitor, Prospect, Lead, and Customer. When a business has a trial period for their product, it's common to have a Trial stage, to differentiate from those that are already paying customers.

Stages can give the company a better picture of who are the sales-ready contacts and who are the ones that need more nurturing.

Step 4

EXAMPLE #6 - STAGE

Let's continue with our last example. Someone purchased a Startup Plan. This person got +100 points for this event and was segmented in the "Startup Plan".

Now this person is a **paying customer** and moved stages from **Lead** to **Customer**, for example.

WHEN VISITORS TRIGGER THIS, YOU CAN...

Increment their score by...

100

Segment them in...

STARTUP PLAN

Make them...

3 - CUSTOMER

5

CREATE THE EMAILS



Step 5

With our software you can send emails like a **human** or like a **software**.



“Hello, I’m a human!”

Send automated messages like me when you want to sound like **a person is actually responding to every email**.



“Hello, I’m the software!”

Send automated messages like me when creating more **generic** emails, like **newsletters** and **onboarding messages**.

Step 5

EMAIL LIKE A HUMAN

CREATE A FANCY MARKETING EMAIL OR A VERY HUMANIZED ONE

☒ Send email like a human

☐ Send email like a software

{{seller.name}}

+ SELLER NAME

{{seller.email}}

+ SELLER EMAIL

How can I help you?

NORMAL TEXT

B

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Hello, John. How are you?

I'm writing because I would like to know if you need any help or information about Route. If there's anything I can do for you just answer this email! Ok?

Sincerely yours,
Jane Doe
Head Of Marketing

The example above is a personal message sent to people that might need help using our software. Only people that were tracked and met the conditions to be in this automation would receive this message, another reason to try using a more personal approach.

Sending this kind of message as a human gives a more **personalized experience** to the user. It implies that an actual person is writing to every contact to offer help.

Step 5

EMAIL LIKE A SOFTWARE

CREATE A FANCY MARKETING EMAIL OR A VERY HUMANIZED ONE

☐ Send email like a human

☒ Send email like a software

Hello

+ SELLER NAME

hello@route.to

+ SELLER EMAIL

Welcome to Route.to

NORMAL TEXT

B

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U

☰

☰

☰

☰

🔗

🖼️

<>

HTML

FONT

▼

CUSTOM ATTRIBUTES

▼

PREVIEW EMAIL

ROUTE

thanks for signing up!

We'll notify you when route.to is ready

Route.to is an automation marketing tool that helps you convert leads into customers and engages your customers with your brand or product.

With this example we want to show an occasion when you can send a less personalized email (many of you have got this email, haven't you?).

Users that registered in our website during the pre-launch period received this email.

It is a lot of people that need to receive the same message about our product. This is a good use of email templates: **when a message must reach a lot of people with general information.**

6

CREATE THE PHONE CALLS



Step 6

For some events you might want to call your contacts. When you set a phone call while creating an automation, Route will **alert one of your sellers to call the customer**.

To create phone calls you need to have your contact's phone number **registered within Route** and you also need to establish the feedbacks from the call you want to make.

The feedbacks are **key points that are important to your call** and you want to ask your contact about them.

By default a seller have 3 days to complete this task. You can change this choosing **Settings > Contacts**.

This period of 3 days means that Route will display the information for your seller assigned to call the contact for 3 days after the alert to call.

After this period, the seller won't see it again.

Step 6

EXAMPLE #7 - PHONE CALL

Interest in buying the product

SUMMARY OF THE POSSIBLE FEEDBACKS FROM CONTACTS

Not Interested.

Increment their score by...

0

Keep scoring

Segment them in...

Make them...

STAY AT THEIR CURRENT STAGE

Interested but still searching for other options.

Increment their score by...

40

Keep scoring

Segment them in...

Make them...

1 - LEAD

Interested and is ready to close the deal.

Increment their score by...

100

Keep scoring

Segment them in...

Make them...

3 - CUSTOMER

+ ADD FEEDBACK

This is an example of a feedback you could create to reach contacts that might be close to close a deal.

Step 6

Remember the company that we were talking about, the **one with the SEO ebook** and a **customer segmented in the “Startup Plan”**?

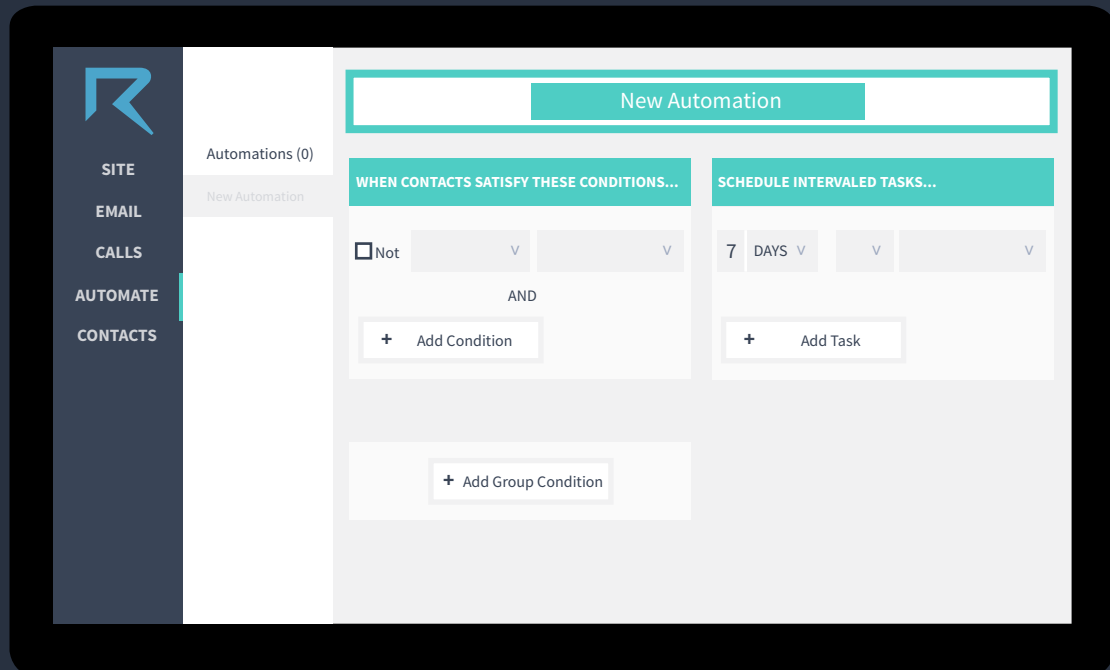
One of their automation was created to reach those that are close to buy their product. So, they set an alert to make a seller call everyone that they assume ready to become a customer.

The seller will call to know more about the contact's needs.

After calling and getting the feedback, the seller can understand better where in the sales funnel that person is and based on the feedback sell the product or plan the next actions to nurture the leads until they're ready to buy.

7

CREATE THE AUTOMATIONS



Step 7

This is a **very important** step because it's the one that will organize the messages you want to send to the events you are tracking.

You'll need to **set the conditions** for an automation to begin, **what kind of message** it will trigger and the **schedule** to send the messages.

New automation

WHEN CONTACTS SATISFY THESE CONDITIONS...

☐ Not

AND

+

ADD CONDITION

OR

+

ADD GROUP CONDITION

SCHEDULE INTERVALED TASKS ...

7

DAYS

+

ADD TASK

See people whit this conditions

☐ Enabled

SAVE

Step 7

SETTING THE CONDITION

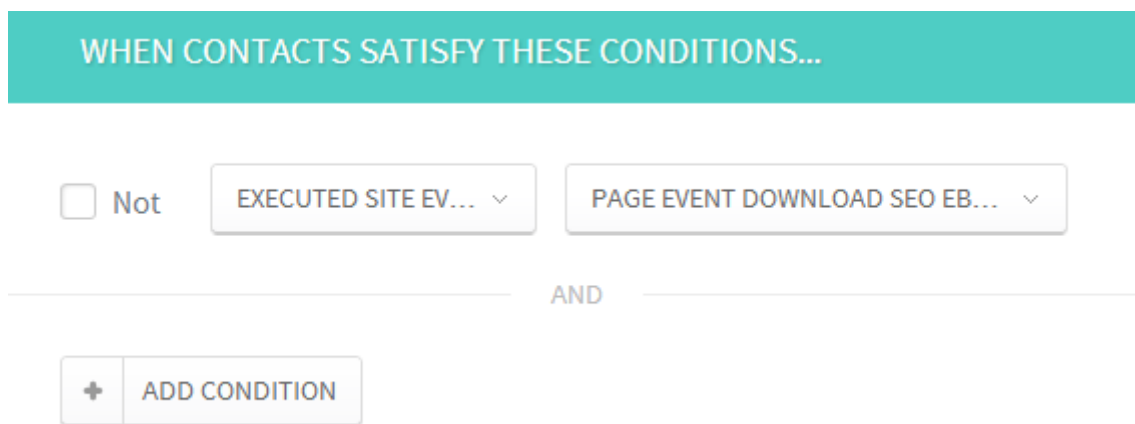
You can choose from 5 different variables:

- **Was segmented:** the automation will reach people in a specific segment;
- **It is in the stage:** the automation will reach people in a specific stage;
- **Executed a site event:** the automation will reach people that performed a specific event on your website;
- **Executed an email event:** the automation will reach people that performed a specific event on your emails;
- **Answered a call:** the automation will reach people that answered to your feedback calls.

You can create an automation if the users didn't meet these criteria by checking **NOT**. It's possible to use and/or to create more complex automations.

Step 7

EXAMPLE #8 - SETTING THE CONDITION



WHEN CONTACTS SATISFY THESE CONDITIONS...

☐ Not

EXECUTED SITE EV... ▾

PAGE EVENT DOWNLOAD SEO EB... ▾

AND

+ ADD CONDITION

This is how the company from our example will instruct Route to start sending automated messages for those people that performed that specific event.

That way, **everyone that downloads the Ebook will enter the automation.**

SETTING THE CONDITION

Now, after creating the condition to an automation to start you have to add the messages you want Route to send. Add as many responses you want and choose the timeframe for each one of them: **minutes**, **hours** and **days**.

Step 7

EXAMPLE #9 - SETTING THE MESSAGE

SCHEDULE INTERVALED TASKS ...

7	DAYS	EMAIL	SEO TIPS FROM 15 EXPERTS
14	DAYS	EMAIL	IS LINK BUILDING DEAD?
21	DAYS	EMAIL	CONTENT MARKETING STILL RULES
+ ADD TASK			

After the user downloaded the Ebook about SEO, an automation will be triggered.

The first message “SEO tips from 15 experts” will be sent 7 days after the download. From that message on, **other emails with relevant content about SEO will be sent** to the people that entered that flow through performing a specific event.

IT'S YOUR TURN NOW

Now start to create the events, messages and automations. Make your contacts move along the sales funnel!

Nurture them, score them and send sales-ready leads to your Sales team.

And remember: if you need help just contact us.

We'll be glad to help you!

Automate your marketing and sales effort

Route is a software company that develops innovative tools focused on sales and marketing.



www.route.to

