

7 Day Trial Membership Checklist

Create Your Membership Vault + Set Up Monthly Payment

If you don't have a membership vault yet, follow the step-by-step training and tutorial in the "How To Build Your..." course in the [AttractWell Success Academy under Courses & Resources](#).

- Under Entry Settings > Entry Campaign, use system default "welcome to vault message"
- Under Payment Setup, check box "allow any with with the link to purchase this vault"

Step 1: Create an Automation to Remove Trial Users After 7 Days

This automation will remove your contact from the vault automatically after 7 days, unless they pay to become a member. This automation will be attached to the final message of your trial sales campaign.

- Title of Automation: "Remove from [name of membership vault] trial"
- Add Action: Remove from [name of membership vault]
- Optional: Apply a post-trial sales campaign for leads who did not convert during the trial

Step 2: Create a 7-Day Trial Sales Campaign

This campaign will go out to contacts who opt in for your trial. It will send out a daily message for 7 days to engage, inform and encourage the lead to upgrade to paid membership. This campaign will be attached to the page or landing page that offers the free trial membership.

- Title Campaign: "[name of membership vault] trial campaign"
- Send one email per day for 7 days.
- CTA for each email is to sign up as a member. Use your vault URL with /purchase at the end as the link: i.e. <http://mywebsite.com/vaults/9741/purchase>
 - Instead of "purchase," you can also use any of the following: payment, purchase, buy, subscribe, join, enroll, checkout, membership, start
- Day 0: Welcome, tour of vault. Encourage them to introduce themselves in discussion
- Days 1-2: Highlight key resources. Get them connected with content
- Days 3-4: Feature results or quick wins
- Days 5-6: Share member testimonials, stories
- Day 7: Final call with urgency
 - Attach automation created in Step 1 to this message

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Step 3: Create Automation to Remove the Sales Campaign After Purchase

This automation will apply to contacts who have opted into a trial and convert to paid membership. It will be applied at the point of sale for your vault, and cause the sales campaign to stop sending messages.

- Title of Automation: "Remove from [name of membership vault] trial campaign"
- Add Action: Remove from trial sales campaign created in step 2
- Optionally, you can bundle other actions into this automation to update contact tag, apply a welcome campaign or a follow-up plan, or any other actions you'd like taken upon purchase.

Step 4: Create a Confirmation Page

This is where leads will be sent immediately after opting in for their trial membership.

- Keep this page simple, with a clear call to action to check their email for next steps:
- They will receive 2 emails from you right away:
 - Built-in welcome to vault campaign sends one message that shows them how to access vault
 - Day 0 of your trial sales campaign will welcome them and set expectations, get them started
- It can be helpful to include a button on this page with URL #contact and copy that tells them to reach out to you if they don't see the messages you've sent to them in their inbox.

Step 5: Create a Free Trial Page or Landing Page

This is the page you'll use to promote your membership vault and free trial offer, and where leads will sign up to begin their free trial.

- Recommended: design this page exactly as you'd design a sales page, highlighting problems and solutions, sharing proof and testimonials, and outlining what they get + what it's worth
- CTA on this page is to start a 7 day free trial, no payment or credit card required
- In the page settings under leads > what to do after a lead registers:
 - Apply the campaign created in step 2
 - Add to your membership vault
 - Send the lead to confirmation page from step 4