

Active Campaign Project Brief



Background: Potential Plus UK is using Active Campaign as its membership and email automation system. It has implemented some basic functionality but now wishes to improve the integration between Active Campaign and its website, which has been developed in Word Press.

Potential Plus UK wishes to work with an individual or company on a project basis to support and develop the Active Campaign email automation and membership system and who can work co-operatively with the company which currently supports its website.

Main objective of the project: To work with Potential Plus UK to ensure that Active Campaign is providing an integrated mailing system for members and others interested in the work of the charity.

Main elements of the project:

1. To assess and understand how Active Campaign is currently working and how it links to the charity's website.
2. To work with nominated staff members at Potential Plus UK and coordinate with Frost Digital, who support the Potential Plus UK website, to ensure that Active Campaign is working effectively.
3. To successfully implement a series of tasks and automations to ensure the effective running of the Active Campaign system.
4. To provide regular progress updates to the Chief Executive.
5. To make practical recommendations for how Active Campaign could be further developed to meet the financial and charitable objectives of Potential Plus UK.
6. To ensure the use of member data is compliant with the General Data Protection Regulation (GDPR).
7. To work professionally and transparently with the charity.

Reporting to: Chief Executive

Location: Flexible, with some visits to head office in Milton Keynes

Person specification:

- Proven competency in Active Campaign
- Good understanding of Word Press
- Good understanding of, and experience with, SQL databases
- Good interpersonal and explanatory skills
- Good writing skills with proven capability to write good quality specifications and test cases
- Experience of agile working would be beneficial

Equipment: Use of own personal hardware unless based at head office

Remuneration: To be agreed; dependent on experience, skills and time frames; payment on receipt of monthly invoice.

Example tasks and automations:

- Data from website needs to be pulled through to Active Campaign automatically e.g. when a discount code is applied; telephone number
- Membership Payment Information needs to be pulled through automatically (amount, date and transaction ID) from PayPal
- Correlation required between expiry date of member school and expiry date of associated family members, so that when a school membership expires so do all the associated family members

Example further developments:

- Opportunity for the booking of advisory calls on the website, linking through to Active Campaign, sending out an email confirmation and a follow-up e.g. text immediately prior to the appointment
- Directory of member schools on the website with automatic removal on expiry

Next steps: If you are interested in working with Potential Plus UK to support and develop the Active Campaign system, please send your CV with cover letter to the Chief Executive on julietaplin@potentialplusuk.org , highlighting how you feel you meet this project brief, your timescale for starting the project and your hourly rate. Closing date for applications is 5pm on Friday 11th January 2019.