

# activ

Flow →

## activ's CRM & Marketing System

An overview for **Clients**

# Welcome to activ

Flow →

## **Your Business, in Sync.**

activ Flow is your central CRM and marketing hub – the marketing engine's behind your business. From managing leads and tracking sales pipelines to launching campaigns and nurturing client relationships, this powerful platform puts everything you need in one place.

Built with busy people in mind, activ Flow is designed to help you work smarter, not harder. Whether your activ marketing partner is doing work on your behalf or you are doing it yourself, it brings structure to your follow-ups, clarity to your marketing, and flow to your day-to-day activity.

## **With activ Flow, you can:**

- Keep your leads warm and your pipeline full
- Track conversations, sales, and marketing performance
- Automate tasks to save time and boost consistency
- Launch email campaigns and nurture sequences

Whether you're just starting out or scaling up, activ Flow supports you at every stage of your journey. It's more than a tool – it's your business partner in the background, keeping things moving while you focus on doing what you do best.

# activ Flow

## What's included?

The platform can be used in a variety of ways - with optional add-ons available (see later slides for details)

### **Imported data**

1

- Seamless transfer of (existing) data into the platform
- Accurate mapping of key data fields
- Bulk upload of contact lists, ready for immediate use

### **Lead capture and email automation**

2

- Set up tags
- Audience segments
- Automated emails to guide and warm leads through your sales pipeline

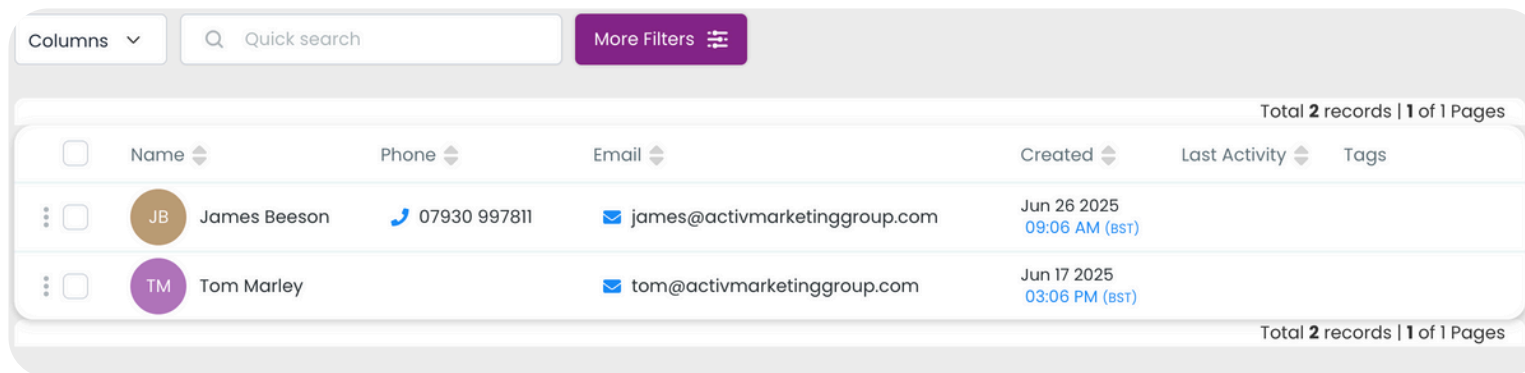
### **Sales pipeline creation**

3

- Set up tags
- Audience segments
- Sales pipeline stages

# What does this look like?

## Your audience portal



The screenshot shows a user interface for an audience portal. At the top, there is a search bar with the text 'Quick search' and a 'More Filters' button. Below the search bar, a table displays contact information. The table has columns for Name, Phone, Email, Created, Last Activity, and Tags. Two contacts are listed: James Beeson and Tom Marley. The table also shows 'Total 2 records | 1 of 1 Pages' at the top right and bottom right.

Name	Phone	Email	Created	Last Activity	Tags
JB James Beeson	07930 997811	james@activmarketinggroup.com	Jun 26 2025 09:06 AM (BST)		
TM Tom Marley		tom@activmarketinggroup.com	Jun 17 2025 03:06 PM (BST)		

Names

Email & phone no. where available

Date of initial activity

Their interaction

Customisable for every account. E.g. 'Newsletter '25'.

An audience portal gives you a centralised view of your contacts from names, numbers, tags, and more - all in one place. This makes it easier to segment, track engagement, and personalise outreach effectively.

Further customisations available as per preference!

# What does this look like?

Your pipeline e.g. sale stage(s)



A flexible sales pipeline lets you tailor each stage to fit your unique sales process, adapting as your business or client needs evolve. This ensures better visibility, control, and alignment with your goals at every step.

In this area, you can view the number of opportunities in each stage, the potential revenue, and a comprehensive overview of each contact.

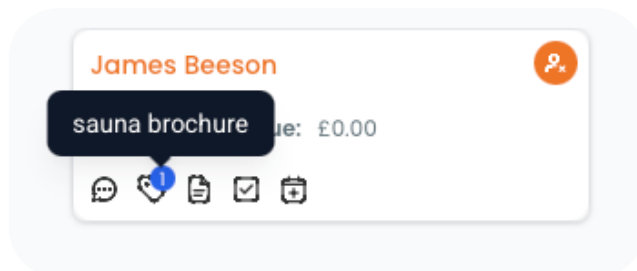
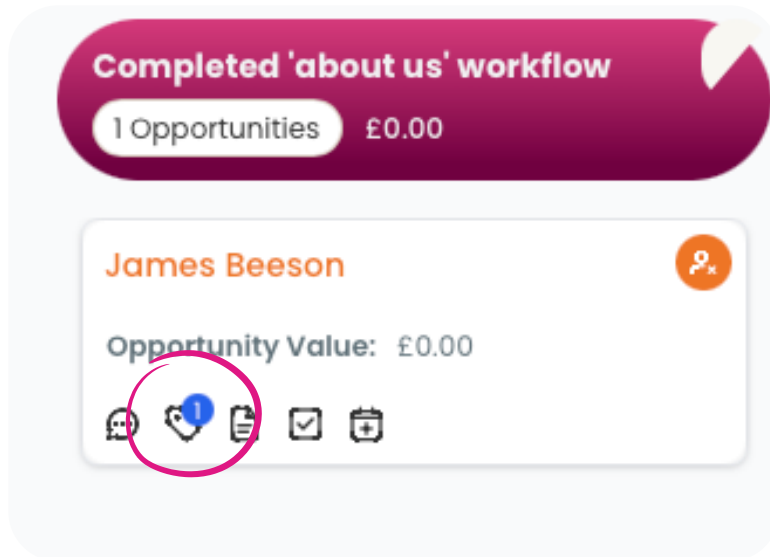
# What does this look like?

## Tags

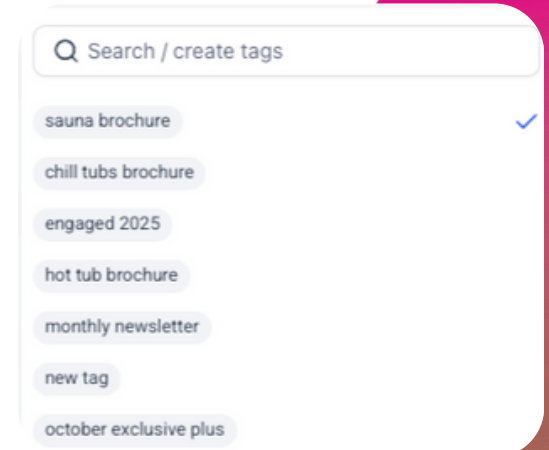
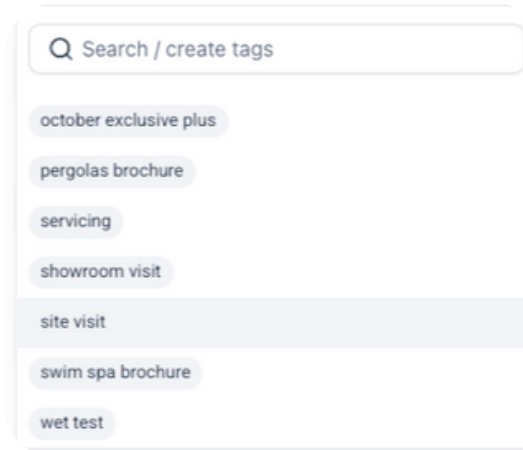
Every person on your contact list will be assigned a **tag**

This will tell you:

- How they've found you
- What interaction they've had with the brand
- What step to take next: call, personal email, a WhatsApp?



\*The tags in the attached screenshots are taken by example from an existing client



# What does this look like?

## Moving prospects

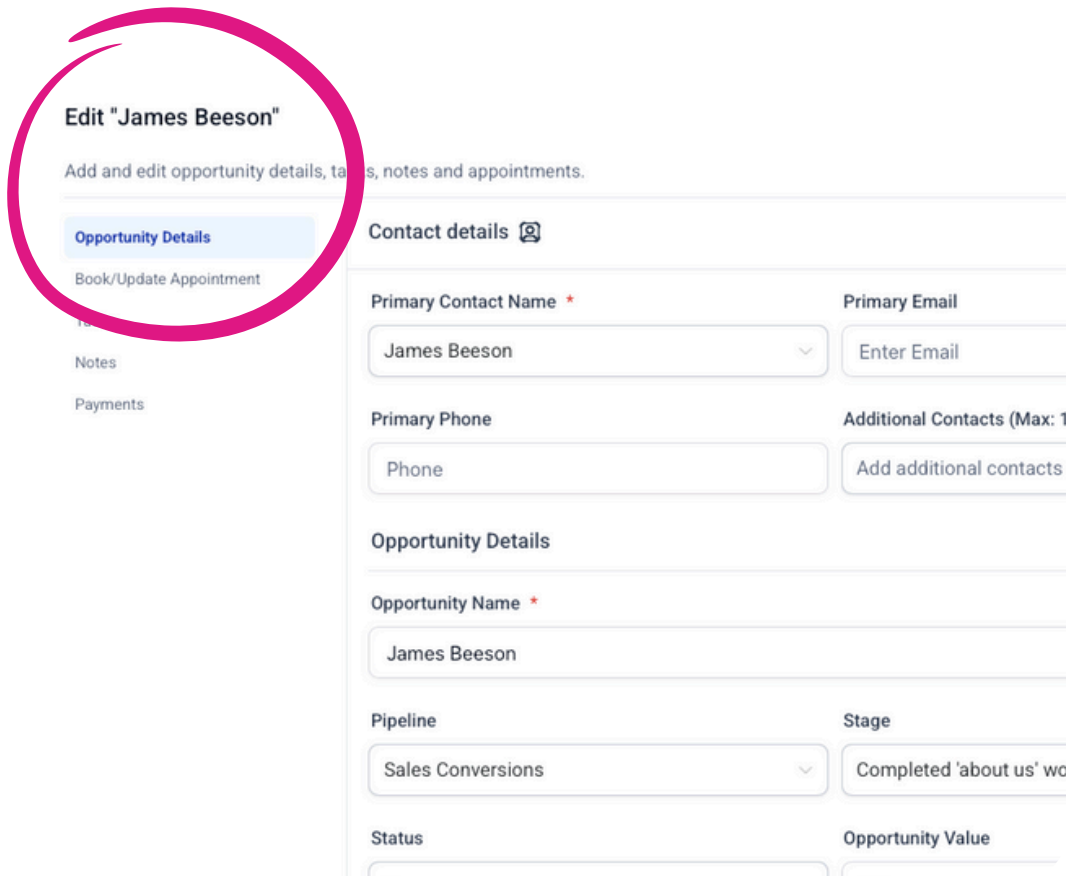
- Stay organised and focused
- Prioritise high-intent leads
- Track progress at a glance



If you're not a visual person, remember that you have the notes pad within the prospects opportunity page (see next slide)

# What does this look like?

## Prospect profile



**Edit "James Beeson"**

Add and edit opportunity details, tasks, notes and appointments.

**Opportunity Details**

Book/Update Appointment

Notes

Payments

**Contact details** ⓘ

**Primary Contact Name \***

**Primary Email**

**Primary Phone**

**Additional Contacts (Max: 1)**

**Opportunity Details**

**Opportunity Name \***

**Pipeline**

**Stage**

**Status**

**Opportunity Value**

Opportunity details

Book/update appointments

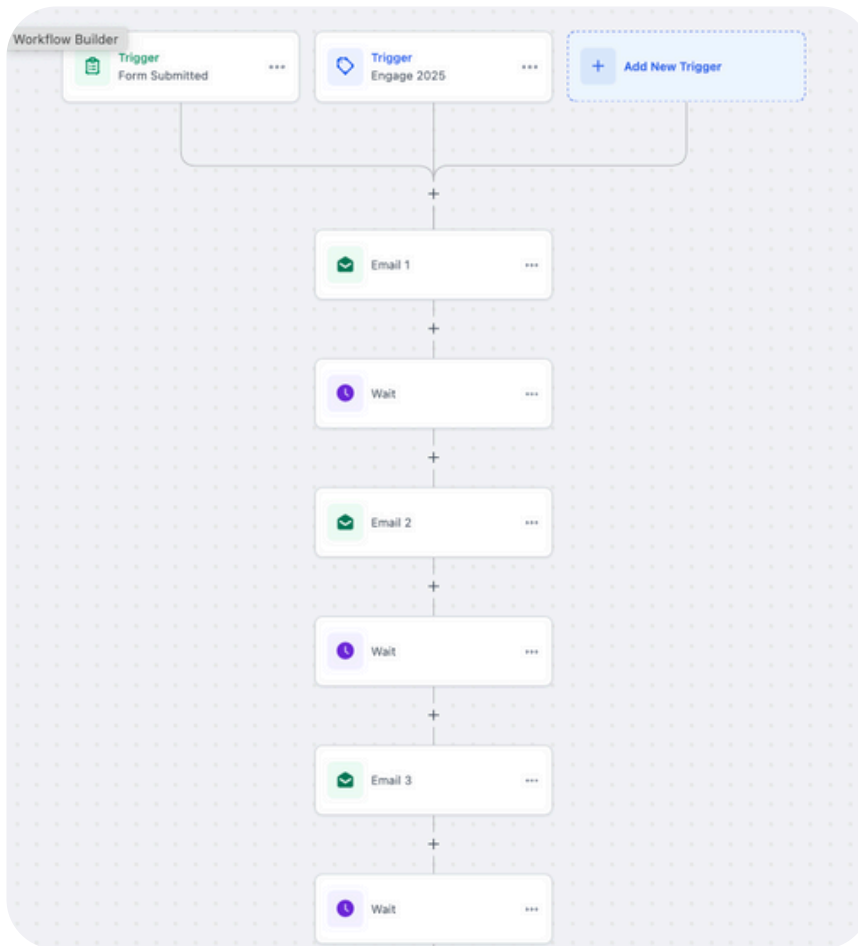
Tasks

Notes

Payments

# What does this look like?

Your automation e.g. email flows



## Emails

Your Automation (e.g. Email Flows), with automation in place, every individual who engages with your website/marketing materials can enter a custom workflow designed to match your objectives.

The next step would be to outline a clear internal process for how you'd like to handle and follow up with these leads. See final slide for examples.

# The overall picture

The screenshot displays the 'activ marketing' CRM interface. On the left is a navigation sidebar with options: Dashboard, Conversations, Calendars, Contacts, Opportunities (highlighted), Payments, Marketing, Automation, and Sites. The main content area is titled 'Opportunities' and includes tabs for 'Opportunities', 'Pipelines', and 'Bulk Actions'. A dropdown menu shows 'Client Services Sales' with '0 opportunities'. Action buttons include 'Import', 'Add opportunity', and 'List'. Below this are 'Advanced Filters' and 'Sort (1)' options. A search bar contains 'Search Opportunities' and a 'Manage Fields' link. A summary row shows five stages: 'Enquiry Received', 'Meeting Booked', 'Meeting Complete', 'Proposal Sent', and 'Nurturing', each with '0 Opportunities' and '£0.00'. A central message states 'No Opportunities Match the Filter's Set' with a magnifying glass icon and a question mark. Below the message are 'Update Filter' and 'Clear Filter' buttons. The top right corner features a user profile 'KB' and notification icons.

# Standard Subscription

## ✓ **What's Included in Your Standard activ Flow**

### **Subscription**

- **3 Website Forms Setup (Done-for-You):**

- Newsletter sign-up
- Contact page
- Book a discovery call
- All forms automated and linked to your calendar

- **Core CRM Features:**

- Conversations inbox to manage client messages
- Integrated calendars for scheduling and visibility
- Contact management – upload, store, and organise your data
- Opportunities pipeline – with an automated workflow to manage your sales journey

- **Marketing & Automation:**

- Ready-to-use automations for your contact form, newsletter, and discovery call booking
- Unlimited form creation
- Email marketing (up to 50,000 emails/month)
- Newsletter tools with visual builder and scheduling

- **Team & Capacity:**

- 1 team members within your system
- Store unlimited contacts

- **Performance & Reporting:**

- Generate activity reports to track monthly

 **45/month**  
*CLIENT PRICE*

# Premium Marketing Add-On

Take your marketing to the next level with our Premium Add-On – a suite of advanced tools designed to boost engagement, increase conversion, and give you more ways to connect with your audience.

With this add-on, you get access to:

## **Snippets:**

- Save time and stay consistent with reusable text blocks for emails, messages, and more – perfect for common responses or branded sign-offs.

## **Countdown Manager:**

- Add urgency to your campaigns with dynamic countdown timers for emails, landing pages, and promotions.

## **Trigger Links:**

- Turn any link into an action – track clicks, automate workflows, or move leads through your funnel with a single click.

## **Surveys & Quizzes:**

- Create interactive surveys and quizzes to capture lead data, qualify prospects, or gather customer insights with ease.

## **Chat Widget:**

- Add a live chat function to your website so visitors can get in touch instantly – boosting engagement and conversion.

## **QR Codes:**

- Generate branded QR codes for events, flyers, or business cards to drive people straight to your booking forms or offers.

## **Social Media Manager:**

- Schedule and publish posts across platforms, manage your content calendar, and streamline your social media presence – all from one place. subscription.

 **£24/month**  
*CLIENT PRICE*



# Payments Bolt-On

Streamline your business finances with the activ Flow Payments Bolt-On.

Take control of your client transactions and paperwork in one place. The Payments Bolt-On gives you everything you need to manage quotes, contracts, invoicing and discounts – saving time, staying compliant, and keeping cash flow moving.

Included in the Payments Bolt-On:

## **Documents & Contracts**

- Create, send, and store client documents with ease. Add e-signature functionality so clients can approve proposals or agreements instantly.

## **Invoicing**

- Generate and send branded invoices directly through activ Flow. Keep track of what's been sent, paid, or is overdue – all in one system. Link with Stripe and other providers.

## **Coupons & Discount Management**

- Offer timed discounts, special pricing, or loyalty incentives using built-in coupon functionality.

## **Payment Links (if applicable)**

- Simplify transactions by sending secure payment links – ideal for deposits, service packages, or one-off purchases.

This bolt-on helps you deliver a more professional, efficient client experience while keeping your finances organised.

 **£16/month**  
*CLIENT PRICE*



# Memberships Bolt-On

Create thriving communities, courses, and recurring revenue with the activ Flow Memberships Bolt-On

Build deeper client relationships and long-term income streams by turning your expertise into value-driven memberships, online communities, and digital courses – all hosted within activ Flow.

Included in the Memberships Bolt-On:

## Membership Sites

- Create gated content areas for paying clients or members, perfect for VIP offers, monthly packages, or exclusive resources.

## Online Courses

- Build and deliver structured training or education modules – ideal for workshops, coaching programmes, or specialist knowledge.

## Client Communities

- Create online spaces where your clients can engage with you and each other. Build trust, increase retention, and offer real value.

## Automated Access Control

- Set rules for who sees what and when – with automatic **enrolment, tiered access, and** expiration settings built in.

Whether you're ready to offer digital products now or want to future-proof your business for scalable growth, this bolt-on makes it easy to get started.

**£14/month**  
*CLIENT PRICE*



# Affiliate Schemes Bolt-On

Grow through referrals and reward advocates with the activ Flow Affiliate Schemes Bolt-On

**(To track and reward sales, the Payments Bolt-On must also be active.)**

Turn your happy clients, partners, and contacts into brand ambassadors. The Affiliate Schemes Bolt-On gives you all the tools you need to set up, manage, and track referral programmes – helping you grow your audience and revenue without lifting a finger.

Included in the Affiliate Schemes Bolt-On:

## **Affiliate Dashboard**

- Each affiliate gets a personal login to track their links, performance, and commissions – all managed automatically in your CRM.

## **Trackable Links**

- Generate unique links for each affiliate to promote your services, courses, or products. Track traffic, conversions, and sales in real time.

## **Custom Commissions**

- Set percentage or flat-rate commission for each product or service. Tailor your scheme to suit your offer and reward structure.

## **Automated Payout Logs**

- Keep tabs on what's owed, what's been paid, and manage affiliate payments with ease (requires Payments Bolt-On).

## **Multiple Programmes**

- Run different schemes for different audiences – e.g., a referral scheme for clients and a commission structure for partners or collaborators.

Whether you're selling online courses, memberships, service packages or digital downloads, this bolt-on helps you expand your reach through trusted advocates.

 **12/month**  
*CLIENTPRICE*

# WhatsApp Bolt-On

Connect faster with automated WhatsApp messaging through activ Flow  
(Message costs apply.)

Reach your clients where they're most active – directly in their WhatsApp inbox. The WhatsApp Bolt-On enables seamless, automated WhatsApp communication through activ Flow, helping you respond faster, follow up more effectively, and boost engagement with a personal touch.

Included in the WhatsApp Bolt-On:

## **WhatsApp Automation**

- Send automated messages for things like form submissions, booking confirmations, appointment reminders, and nurture sequences – all triggered by client actions.

## **Broadcast Campaigns**

- Communicate updates, offers, and news to multiple clients via WhatsApp while keeping each conversation 1-to-1 and compliant.

## **Direct Inbox Integration**

- Manage WhatsApp conversations alongside your emails, calls, and SMS within activ Flow – no switching tools needed.

## **Real-Time Lead Follow-Up**

- Use WhatsApp for instant follow-up with new enquiries and active prospects, helping you increase response rates and conversions.

## **Cost Notice:**

Each WhatsApp message sent is billed at approximately **7p per message, invoiced the following month.**

 **40/month**  
*CLIENT PRICE*

# Additional Team Member Bolt-On

Expand your activ Flow access for team.

As your business grows, so can your team. The Additional Team Member Bolt-On allows you to purchase extra user access to your activ Flow CRM, giving more members of your team the ability to collaborate, manage clients, and deliver campaigns within the same system.

Included in this bolt-on:

## **Full Platform Access**


- Each additional user can access contacts, pipelines, automations, campaigns, calendars, forms, and more – depending on your permissions.

## **Custom Roles & Permissions**

- Assign roles to control who sees what, from full access to limited views. Great for assistants, junior marketers, or contractors.

## **Team Collaboration**

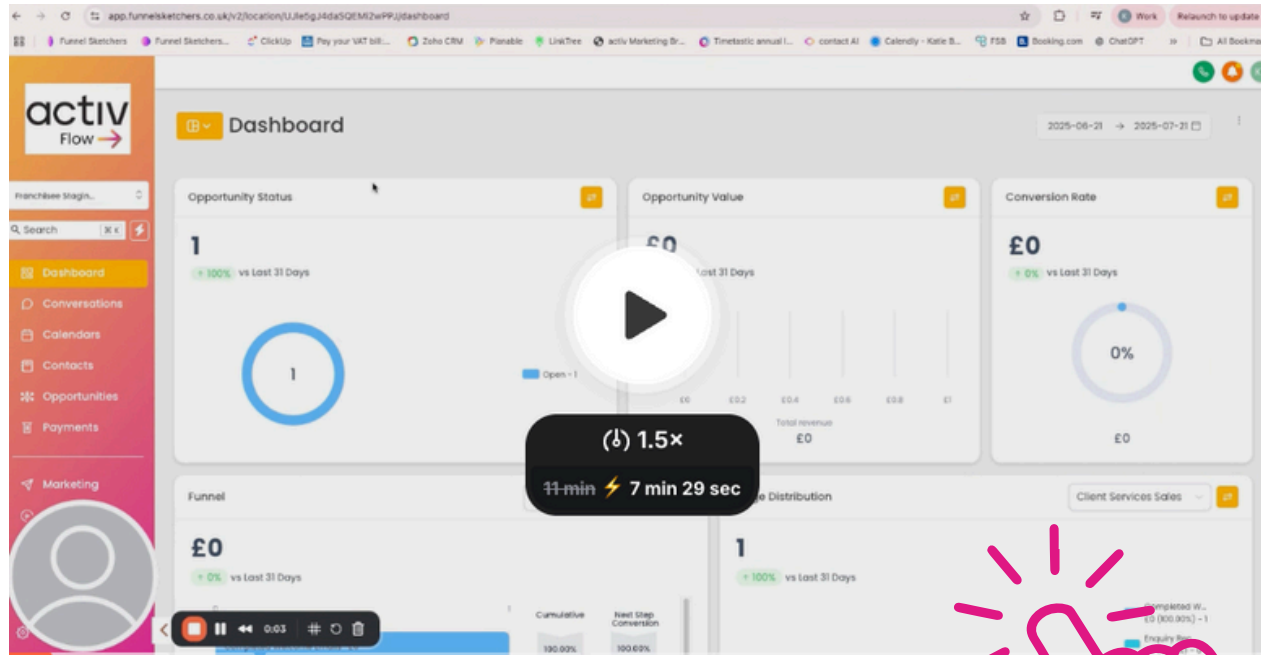
- Multiple users can work on client accounts simultaneously, improving response times, visibility, and workload distribution.

 Additional user licences are charged per person, per month and billed alongside your existing activ Flow subscription.

 **6/month**  
*CLIENT PRICE PER  
USER*

# Want to see a demo?

Watch a quick system overview demo here:



activ  
marketing®

# Want to sign up?

It couldn't be easier to sign up!

***Simply contact your activ partner*** and they will send you a link to sign up.

Once you have completed the sign up process, a comprehensive form will then hit your inbox, requesting all the information we need to get you set up and live! We will aim to complete set up within 2-4 working days.

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