Ultimate Guide to Getting Started on Hive

Helping you get the most out of Hive.

Getting started on a new email CRM shouldn’t be overwhelming. We’ve broken down everything you need to know to send smarter email, from importing your first subscriber, to sending your first email campaign.

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The Dashboard

When you log into Hive, you'll first see the dashboard with a full overview of your email performance. This is a great place to keep an eye on how your list is growing, how subscribers are moving through engagement levels, and how much revenue you're generating from emails sent in Hive.

Subscriber Growth & Engagement Level

This section of the dashboard shows your list growth, movement through engagement levels, and unsubscribes.

Hive automatically sorts your subscribers into engagement levels to help you maintain a healthy list:

- **Active Subscribers:** Subscribers who engaged with (i.e. opened or clicked) any of the last 5 emails they received
- **New Subscribers:** Subscribers who haven't yet engaged, but received less than 5 emails
- **At-Risk Subscribers:** Subscribers who haven't engaged recently and received at least 5 emails
- **Inactive Subscribers:** Subscribers who haven't engaged with any of the last 10+ emails they've received
- **Invalid Subscribers:** Subscribers who have inaccurate, invalid email addresses, or who have unsubscribed

Email Performance

The next section of the dashboard is the Email Performance section. This shows the number of emails sent over time, overall engagement, and average opens and clicks.

Ecommerce Performance

The last section on the dashboard is the Ecommerce Performance section. This graph tracks overall revenue, revenue from emails sent in Hive, and the revenue breakdown between campaigns and journeys.

Learn More

- The New Hive Dashboard
- What Are Engagement Levels Based On?
- Why Hive Puts Subscriber Engagement Front and Center

Watch the Video Tutorial

Go to Import Contacts

Importing Contacts

You can import contacts any time by clicking ‘Import Contacts’ in the left sidebar. From here you can choose to upload a CSV file or connect to an integration that automatically updates your data. If you choose ‘Upload CSV File’, you'll see the option to bulk import multiple contacts at once.

Once you’ve chosen a CSV to manually import into a static segment, you’ll choose a name for the segment. If you’d like the file to be imported into multiple segments, just separate the segment names with commas.

If you’d like the CSV to be imported into an existing segment, just include that segment’s exact name. This will automatically import the file into the pre-existing segment.

After the CSV file is selected, you’ll be asked to select column types, like first name or email address. If you don’t want to import data from a specific column, you can leave the column type blank - the only required column is email address.

Behind the Scenes

To check on your import, select ‘Previous CSV Imports’. When you import a new CSV, it can take up to 15 minutes to fully sync into your account. There are a few things happening in the backend during this time:

- Email addresses are validated
- Invalid or outdated email addresses are flagged
- Any duplicate subscriber profiles are synced
- Publicly available data like full name, gender, location, and age is added to individual subscriber profiles

Learn More

- What Happens When You Import Email Addresses
- What To Do If Your Email List Fails Validation
- How To Import Contacts

Watch the Video Tutorial

Go to the Contact List

The Contact List

The contact list is the CRM component of Hive. This is where all your contacts, including both subscribed and unsubscribed contacts, can be found. Your contact list includes hundreds of filters that help you build segments to send targeted email campaigns.

In the contact list table, you get a full look at your contacts' engagement levels without applying any filters.

Filtering Contacts

By clicking 'view all filters', you can see all of the contact list filters, broken down by popularity and categories. You can even apply multiple filters at once to create specific segments.

When choosing multiple filters, you have the option to change the logic between them. If you select 'AND', you'll filter for all contacts who meet both requirements. If you select 'OR', you'll filter for all contacts who meet either requirement.

Once your chosen filters are applied, you can easily do the following actions:

- Email selected contacts by clicking the ‘Email’ button
- Create a new segment
- Export the contacts
- Share the exported list with a colleague

Learn More

- [How To Filter Your Contact List]

Watch the Video Tutorial

Go to Segments

Creating Segments

To create a new segment, click '+ New Segment' and choose either a static segment or a live segment.

Static Segments

A static segment captures all of the subscribers that match your filters right now. Subscribers can be manually added or removed from this type of segment.

Live Segments

A live segment captures all of the subscribers that match your filters right now, as well as any subscribers that match these filters in the future. Live segments continuously update as subscribers enter or exit the filters you set.

If you choose 'Live Segment', you'll be asked to type a name for your segment, then select the filters you'd like to apply. Users will automatically enter or exit this segment as they match the filters you choose.

You can also edit the filters that apply to a live segment on the Segments page by clicking 'Action > Edit Live Segment'.

Creating a Live or Static Segment

Click the '+ New Segment' button and choose to create a live or static segment. Then you'll type a name for your segment and select the filters you'd like to apply. If creating a live segment, users will automatically enter or exit this segment as they match the filters you choose. If creating a static segment, users can only be manually added or removed.

You can also edit the filters that apply to a live segment on the Segments page by clicking 'Action > Edit Live Segment'.

Learn More

- How To Create Segments
- How To Apply Filters On Your Email List
- Segmentation Strategy Blog Posts
- Ultimate Guide to Email Segmentation

Watch the Video Tutorial

Go to Segments

Managing Segments

Segments are groups of subscribers, created from imports or by filtering your contact list. You can find yours on the Segments page in Hive. These groups can be based on the qualities that are important to your brand. By default, Hive automatically sorts your subscriber list into five engagement level segments, which are also reflected on the dashboard.

Sorting Segments

You can create folders to keep your segment list organized by clicking the '+ ADD' button in the column on the left. You can also select multiple segments to add them to the same folder.

If you have any contacts syncing from third party data sources like Shopify or Eventbrite, those folders will also be shown in this list, and will automatically update.

Actions Menu

The 'Actions' menu on the right of each segment gives you the option to add segments to a folder, email all users within that segment, or export all users within that segment.

To view segment statistics, click 'Action > View Segments Stats'. This will show you a breakdown of email engagement statistics, order and revenue statistics, and demographic information.

Learn More

- What Are Segments?
- How To Manage Your Segments
- How To Use The Events Page
- How To View Segment Engagement Stats
- Segmentation Strategy Blog Posts
- Ultimate Guide to Email Segmentation

Watch the Video Tutorial

Sending Email Campaigns

To create your email campaign, click the 'New Email Campaign' button on the Email Campaigns page. You'll have three types of campaigns to choose from, but we'll look at one-time email campaigns for now.

Choose Your Recipients

Next, you'll choose who you want to send your email campaign to. You can choose from one of the most popular filters, view all the filters, or send the campaign to your entire contact list.

Best practise tip: *Send to specific segments to get an average of 40% more opens and 15% more clicks.*

Then you'll select which recipients within the segment you'd like to send the email campaign to, broken up by engagement level.

Best practice tip: *By default, Hive selects your Active, New, and At-risk subscribers to send the email campaign to.*

Sending to your inactive subscribers can significantly hurt your email deliverability, and potentially land your email in the spam folder. It's best to craft specific messaging to re-engage inactive subscribers with a winback campaign, leaving them out of general campaigns in the meantime.

Build Your Campaign

Once you've selected your campaign's recipients, you'll fill in the other details, including setting a subject line and preview text. This is also where you'll determine what date and time the campaign will be sent on. If you choose to send the email campaign immediately, it'll show in the Sent section of the email campaign page. If you choose to send the email campaign at a later date/time, the campaign will show in the Scheduled section of the email campaign page.

Then, you'll choose the template for your email campaign, or create a new one directly within the campaign builder. If you select a pre-existing template, you can make changes in the template editor or leave it as is, and then click 'Save & Continue'.

Deliverability

Next, you'll be shown your email's 'Campaign Deliverability'. If your email campaign is estimated to have a low deliverability score, Hive will share some recommendations on how you can improve it.

Finishing Touches

If at any point you want to go back and change something, you can click the appropriate step in the left sidebar.

The final step is to confirm your email campaign's details, and either send it or save it as a draft.

Learn More

- Email Marketing Blog Posts
- How To Send An Email
- Ultimate Email Campaign Pre-Send Checklist

Watch the Video Tutorial

Go to Email Campaigns

Managing Email Campaigns

On the Email Campaigns page, you can view all previously sent, scheduled, and drafted email campaigns.

Sent

On the Sent page, you can view the total number of emails sent, the percentage of emails opened, and the percentage of emails that have been clicked. If you have revenue data synced with Hive, you'll also be able to view the total revenue generated from your email campaigns.

If you click the 'Action' button, you'll have the option to view the campaign's stats, resend to unopened recipients, or send a similar email.

Scheduled

On the Scheduled Email Campaigns page, you'll see all campaigns scheduled to be sent out at the date and time selected when the campaign was built. If you click the 'Action button', you'll be able to cancel the scheduled email campaign.

Drafts

On the Drafts page, you'll see all saved drafts. If you click the 'Action' button, you'll be able to edit and delete draft campaigns.

All Email Stats

On the All Email Stats page, you'll see a breakdown of all email statistics that can be filtered by week, month, year, or a custom timeframe. The statistics include the number of emails sent, delivered, opened, clicked, spam complaints, unsubscribers, and bounces.

Email Settings

On the Email Settings page, you can set your reply-to email address, legal postal address (which is required to comply with CANSPAM laws), and configure your own custom subdomain (as your brand's "from" email address). This is also where you can copy and send a link to your subscribers if they'd like to modify their subscriber preferences.

Learn More

- Email Marketing Blog Posts
- How To View Email Campaign Reports
- What You Need To Know About Custom Domains and Subdomains

Watch the Video Tutorial

Go to Email Templates

Creating Email Templates

Click ‘Templates’ to see your existing templates or create a new one. There you’ll see all of the default templates that you can edit.

When creating a new template, you’ll have the option to use the template directly within an email campaign or in an email journey. If you just want to create a template and choose the campaign later, click ‘I’m not sure yet’.

You also have the option to import an HTML template. If you hover over a template and click ‘Action’, you’ll have the option to send a new email using the selected template, edit, duplicate, or delete the template.

Template Editor

After choosing a template or creating a new template, the template editor will open.

To edit your template, drag and drop the content blocks you’d like to add to your template.

To add more columns, drag in a column block and then select the format of the block. You’ll now have multiple sections where you can add content.

To change the content width of the email, click 'Body' and adjust the content width in the General section.

To add space or padding around content blocks, click on the appropriate block and scroll down in the right-hand menu. There, you can add padding to all sides of the block, or click 'More Options' to add custom padding to any side.

Test and Save

To preview what your email would look like on desktop or mobile, select the desktop or mobile icon in the bottom left corner. You can also view your email in a pop-up window by clicking 'Preview Email'.

Click 'Send Test Email' to send yourself or other teammates the email.

Best Practice Tip: If you're using the same elements repeatedly (like a header, buttons, etc.), you can save these blocks to use in other email templates. Do this by clicking the row (beside the content blocks), then click the bookmark icon to save. To view your saved blocks, click 'Blocks' in the right sidebar under Content.

Click 'Save Template' to save. You can either select a pre-existing template to save the changes, overwriting the old template, or you can save a new template.

Learn More

- Email Design Blog Posts
- How To Use Merge Tags In Email Templates
- How To Save A Template

Watch the Video Tutorial

Creating Email Automations

Set up automated email campaigns in Hive to engage the right subscribers, at exactly the right time. From setting up default journeys like welcome and winback, to creating journeys based off your own unique segments (groups of subscribers that have filters applied, i.e. subscribers who lives in Canada), let's dive in.

Setting Up An Email Journey

To set up an Email Journey, click the `+ New Email Journey' button, then enter a title for your email journey. Now it's time to decide what entry trigger to set up, which is what determines how your subscribers will enter the journey.

The Essential Journeys

There are several different automated email campaigns that you set up in Hive. First we'll cover the basics: welcome and winback journeys.

Welcome Email Automation

Welcome journeys are a great way to introduce new subscribers to your brand, set expectations for email marketing, and get new subscribers engaging with your emails right off the bat.

Winback Email Automation

Winback journeys are the best way to re-engage inactive subscribers (subscribers who haven't opened 10+ emails). Grab the attention of your inactive subscribers with catchy headlines, special discounts, and reminders for why they should interact with your emails.

Events & Ecommerce Journeys

Sell more stuff and capture revenue by taking advantage of our event and ecommerce automations:

Abandoned Cart Automation

Set up an abandoned cart email automation to re-engage your customer, drive sales, and boost your email deliverability.

New Customer Thank You Automation

Give paying customers a reason to engage with your emails by setting up a completed order/new customer thank you email automation. This type of automation drives engagement levels, makes your customers feel appreciated and give them a reason to purchase again.

Browse Abandonment Automation

Capture customers who haven't made it to the cart yet, but have showed interest in an item. Entice your customers to complete the sale by setting up this automation.

Custom Journeys (Triggered Off Segments)

You can create a journey that triggers based on anyone who enters or exits a segment, or subscribers who are already within a segment.

If you set the entry trigger as users who are already in a segment, then anyone who is in that segment will be pushed through the email journey.

Finishing Touches

Once you've decided how your subscribers will enter the journey, you'll set the global rule. Global rules are rules to be evaluated at each step to determine which customers continue through the journey. Once set, you can choose to add a time delay or send an email.

You'll be asked to configure the email details like subject line and choose a template. Once set, you have the option of adding another time delay and email to the journey.

If you click the gear icon in the top left corner, you can choose how often you'd like your subscriber to enter into the journey. Then you can choose to either set the journey live, by toggling from 'Paused' to 'Live', or keep it paused to save the journey as a draft to revisit later.

Learn More

- Email Automation Blog Posts
- How To Send An Email Journey
- How To Create A Welcome Series
- How To Create A Winback Series
- How To Create An Abandoned Cart Journey
- How To Create A Browse Abandonment Journey
- How To Create A New Customer Thank You Journey

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Need help migrating to Hive?

From template creation to custom deliverability plans, we offer implementation services to get you migrated the right way.

Reach out at migration@hive.co

Hive.co

*Helping you send smarter email,
so you can sell more stuff.*