

# Email Automation Planning Workbook



This workbook is designed to help you ideate and outline an automation program including the data points and content steps needed in your workflow. You can re-use this workbook for any new automation you'd like to build out for your email program.



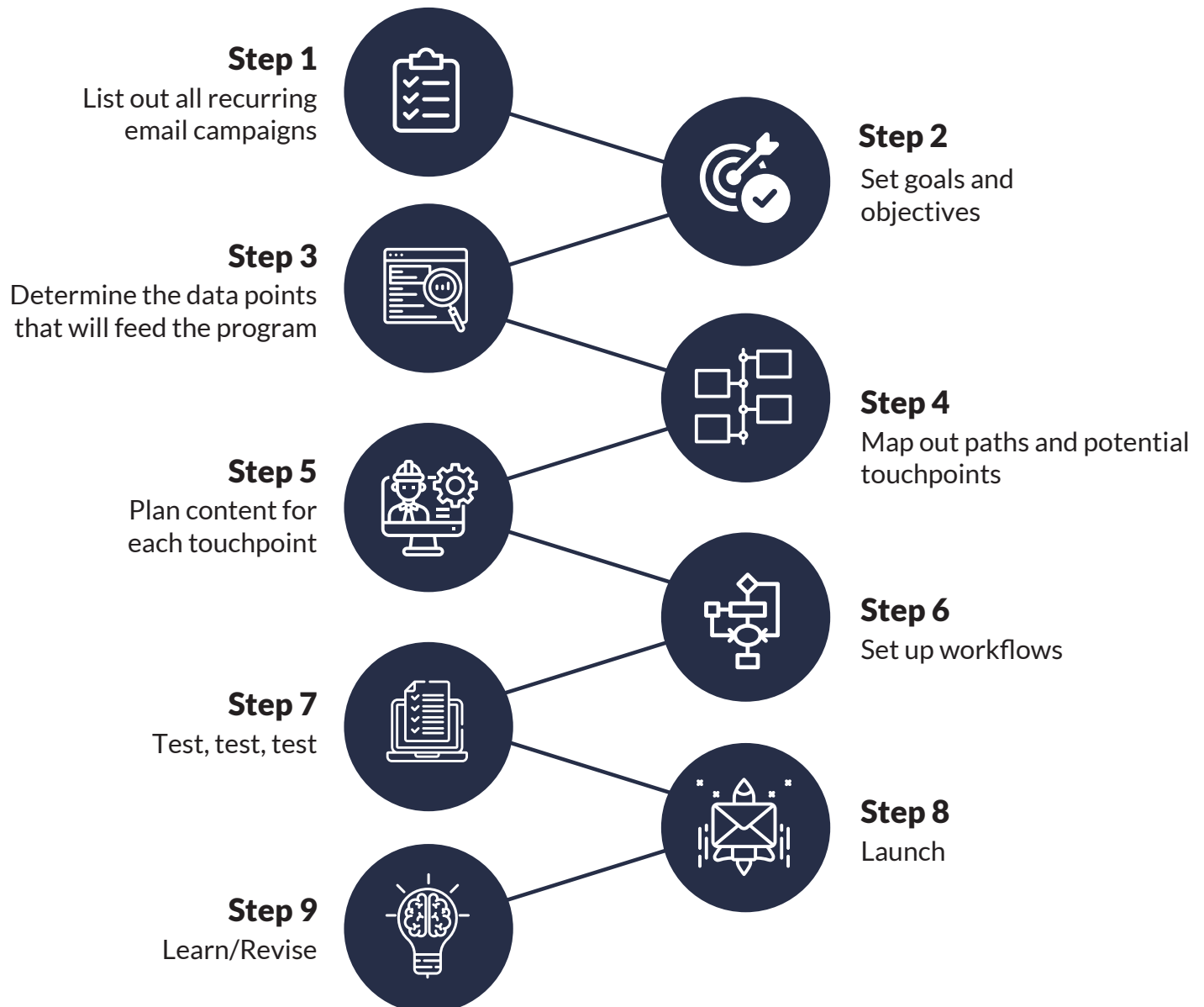
# What is Email Automation?

Email automation a method of automating email communication using segmented, data-driven or behavioral triggers to manage common email marketing workflows.

## Some use cases for automation could be:

- Welcome Series
- Cart Abandonment
- Member Renewal Series
- Lifecycle Automation
- Reengagement/Reactivation
- Event Registration Email Series

## Steps to plan your automation program:





# Section 1: Email Automation Planning

What are some recurring emails you send?


Planning (Choose one from the list below or fill in other)

**Program Type:**

<input type="checkbox"/> Welcome Series	<input type="checkbox"/> Reengagement/Reactivation
<input type="checkbox"/> Cart Abandonment	<input type="checkbox"/> Event Registration Email Series
<input type="checkbox"/> Member Renewal Series	<input type="checkbox"/> Lifecycle Automation
<input type="checkbox"/> Other	

Program Goals (KPI or Objectives)

What do you hope to achieve with this program? How will you measure success?

## Take Inventory of Your Data

List out all of the data sources you have. What attributes do you have, where do they live, how are they organized (by contact, by transaction, etc.), where are they synced from/to, what data “wins” in a discrepancy?

## Data Points/Criteria to Enter Program:

What do you hope to achieve with this program? How will you measure success?

## DATA FIELDS:

[illegible]

**ACCEPTANCE CRITERIA VALUE:**



## Section 2: Building Your Program

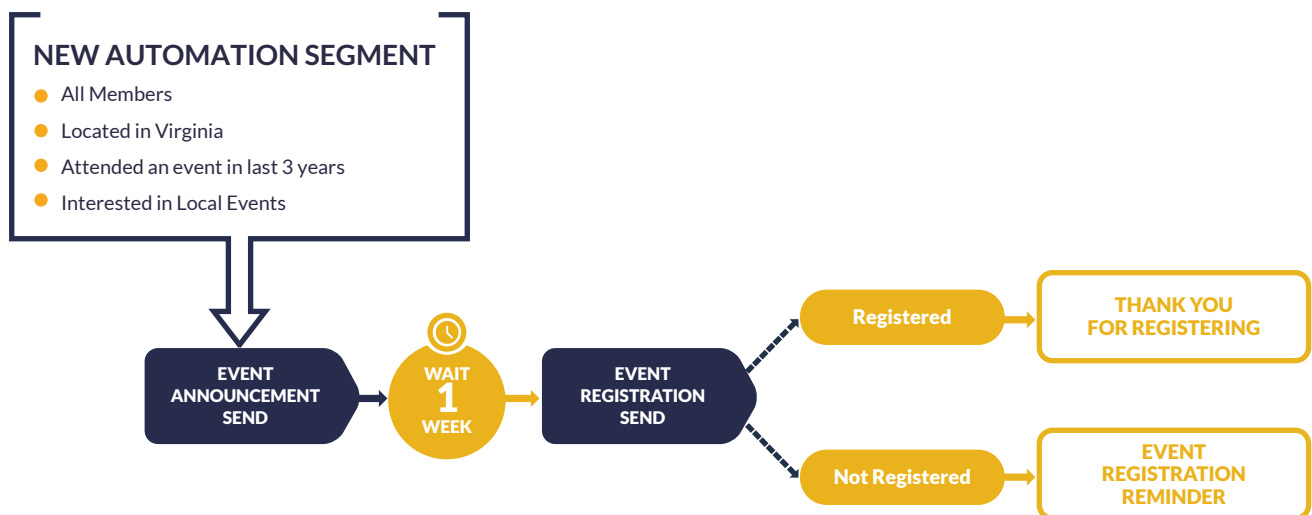
### Member Journey

Before outlining your workflow, describe the intended member journey through this program. Include any alternate paths, delays, and expected actions.

### Draw Your Automation Map:

Next, draw out an automation map – a visual representation of your email program’s flow. This can be done on a program like Powerpoint or <https://www.lucidchart.com/>, or simply sketched on paper. This will help give you direction and avoid mistakes as you build your automation series.

### Example Automation Map:



## Plan Your Content Touchpoints:

Once you've drawn out your map, begin to plan your content assets or touchpoints using the **Email Content Touchpoint Guide**.

Step Type	Step Description	Rules	Content Notes	Asset Status	Landing Page(s)	Form/Survey
1	Content Send	Welcome New Member Email	Membership registration date is 3 days ago	Learn about your member benefits, visit the member benefits landing page for more info	organization.com/membership	N/A
2	Delay	Wait 3 Days	Delay 5 days before sending next email			
3	Content Send	Email Preferences Email	All members in the program	Fill out the EPC to help us personalize your email experience	EPC	EPC
4	Delay	Wait 3 Days				
5	Decision Point	Resend to non-opens	Resend EPC Email Reminder if no open from Step 3, Send next email in series if opened			
6	Content Send	Volunteer Opportunities	All members in the program	Learn about volunteer opportunities, fill out EPC form on volunteer interests	organization.com/membership, EPC	EPC
7	Delay	Wait 5 Days				
8	Content Send	Welcome Conditional Content	All members in the program	Conditional content block based on EPC interests - volunteer, events, or education	organization.com/events, organization.com/volunteer, organization.com/education	
9	Delay	Wait 5 Days				
10	Content Send	Upcoming Volunteer Opportunities	Only Members in Volunteer List		organization.com/volunteer	volunteer registration
11	Content Send	Upcoming Events	Only Members in Events List			
12	Create List	Export List of All Who Responded to Volunteer Email	Upon program completion, send list to Volunteer Program			

## Test your Workflow

Use the chart below to map out each potential scenario in the automation workflow. Run a test with sample data for each scenario to ensure the email automation program works as intended before activating on production.

## SCENARIO

[illegible]

### TEST NOTES (PASS/FAIL)



# Section 3: Track Your Program Performance

## Track Performance

Using your Project reporting tool, review the performance of your program. Depending on the send cadence and volume, you may allow 30-90 days to collect data before reviewing. List the performance metrics for each individual email send within your program and then pull averages for total program performance.

EMAIL/CONTENT TOUCHPOINT	OPEN RATE	CLICK RATE	CONVERSION RATE

### Summary of Automated Program Performance

Average/total of all emails in your new automation program:

TOTAL SENT	OPEN RATE	CLICK RATE	CONVERSION RATE



# Summary of Standard Email Performance

Compare to your overall email metrics for non-automated sends:

TOTAL SENT	OPEN RATE	CLICK RATE	CONVERSION RATE

After launch, what findings or takeaways did you observe? What would you like to change or improve?

Describe next steps for your email program