

EMAIL

AUTOMATION 101

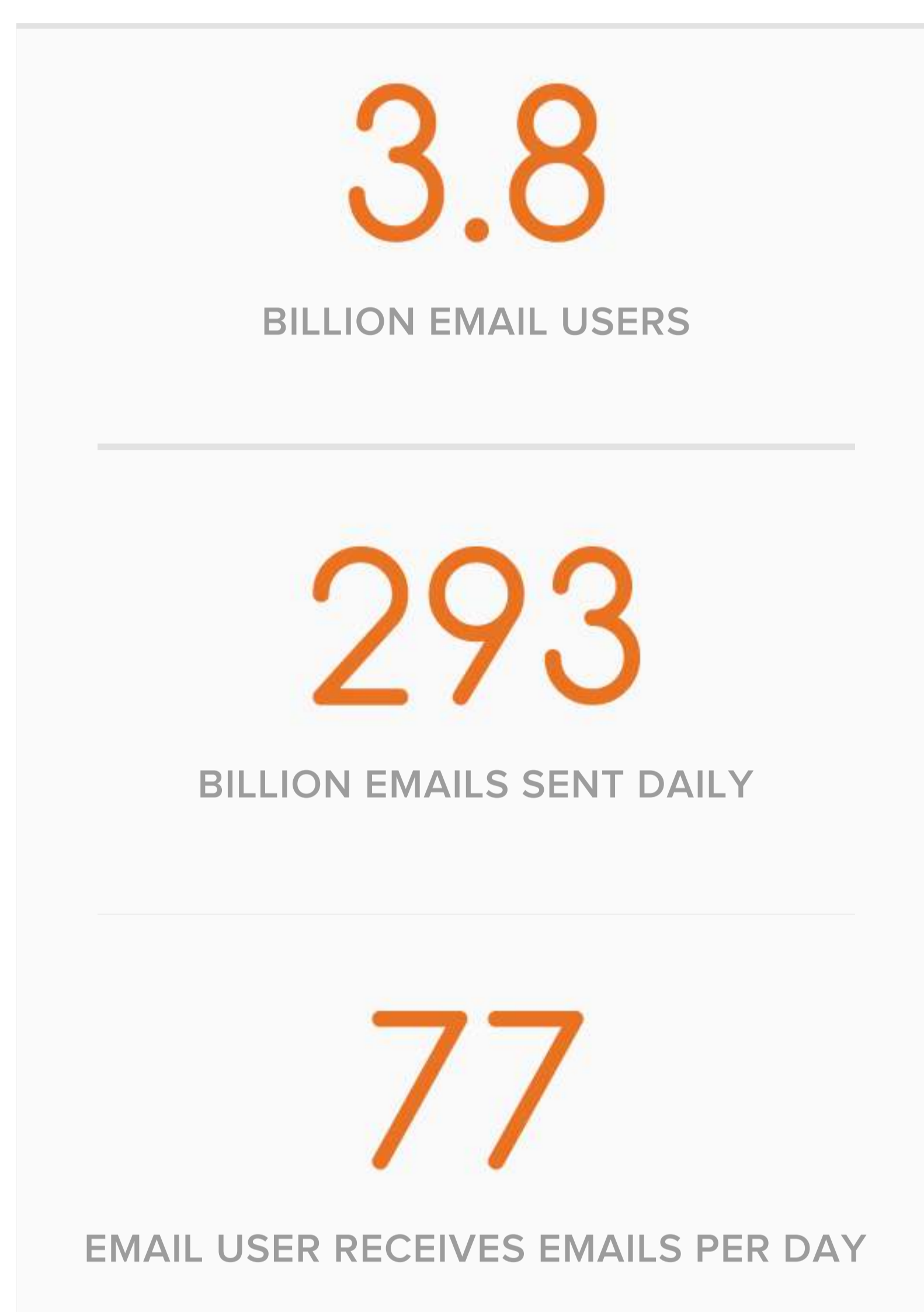


How To Sound
Personalized Without
Human
Intervention

INDEX

1 What is email automation?	02 →
2 Importance of email automation?	03 →
3 Challenges to implementing email automation	04 →
4 Types of Email Automation	09 →
- Drip Campaign	
- Triggered Campaigns	
5 How to create an email automation workflow	11 →
- Create a customer journey	
- Segmentation criteria	
- Trigger conditions	
- Trigger conditions	
6 Email automation example	14 →
- Welcome series	
- Transactional emails	
- Lead Nurturing emails	
- Cart abandonment emails	
- Recommendation emails	
- Re-engagement emails	
- Referral Emails	
- Double Opt-in emails	
- Others	
7 Tools to integrate with your Email automation.....	28 →
8 Email automation Best Practices.....	32 →
9 Wrapping Up	33 →

INTRODUCTION



Globally, there are 3.8 billion email users, and on an average day, 293 billion emails are sent daily. So, an average email user receives 77 emails per day, which can be a mix of business, casual, marketing, as well as SPAM emails.

Unless the email doesn't 'communicate' with the recipient, it holds no value and is as good as unsent. People like to be treated as an actual person instead of just a name in an emailing list.

From an email marketer's point of view, the amount of work that goes behind planning and executing an email

campaign makes it impossible for a marketer to give special attention to personalizing every email sent.

Out of the need for finding a way to send a personalized email to multiple recipients without manual labor was a golden tool invented, i.e., email automation.

The goal of this book to educate you about everything there is to know regarding email automation such as types of email automation, its significance & application in email marketing, challenges faced as well as tools to help you with email automation.

All email examples showcased here are from ReallyGoodEmails.com.



What is email automation?

Email automation is a tool developed to automate the repetitive process of sending emails based on the workflow and triggers specified by the email marketer. The advantage of email automation is that it enables you to send a one-to-one conversation in real-time without human interference.

Thanks to automated emails, email marketers can send messages that are rich in:

- **Relevance**
- **Engaging content**
- **Brand building tactics**

In fact, it has been observed that automated welcome series have generated 86% higher open rates, a 196% increase in click-through rates, and 320% more revenue than standard promotional emails.

With the help of email automation, you can send both kinds of emails i.e. (i) Timely transactional emails (ii) Content heavy marketing emails. So, you get the best of both, timing as well as content, without having to manually set up the campaign every time it is to be sent.

By linking your email automation to your CRM as well as website analytics, your subscribers can be better targeted based on behavior, preferences, and previous interactions with the brand. Then further communications can be personalized based on each customer's experience.

86%

HIGHER OPEN RATES

196%

INCREASE IN CLICK-THROUGH RATES

320%

MORE REVENUE

Importance of email automation?

Email marketing is all about sending the correct message at the opportune time to the right audience. Email automation manages to drive in real and meaningful business results including:



Brand Loyalty

A welcome email to onboard new subscribers and introduce them to your brand helps them feel associated. Similarly, a timely birthday or anniversary email makes the customer feel valued and such brand building exercises help them to recommend your brand to others.



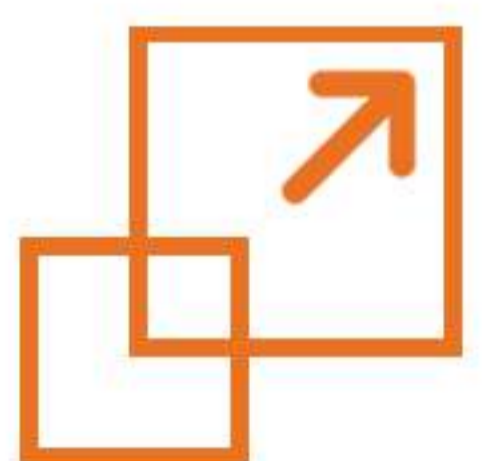
Retention

A reorder reminder email is a personalized communication and shows that the brand is taking efforts to make the customers feel more valued. As long as they continue getting a good user experience, there is no reason for them to venture towards your competition. Longer retention translates to loyal customers. Similarly, a re-engagement email with the correct message has more chances to bring back a dormant subscriber.



Revenue

Cart abandonment is something that every brand has to deal with. Thankfully, a personalized cart abandonment email can act as the perfect reminder to reel them back in. In fact, when shoppers knew that the received email was based on their online activity, the click-through rates increased by 11% and revenue generated grew by 38%.



Scalability

Whether you are currently sending emails to 100 subscribers today or 10,000 subscribers in the future, your email automation workflow can be easily scaled. With email automation, any new subscriber is automatically added as soon as they perform any of the specified trigger conditions.

Challenges in implementing an email automation

You may be wondering that if email automation makes the work of an email marketer less repetitive (too bad email automation cannot do list segmentation or create a workflow by its own), why do most email marketers afraid to adopt it for all their marketing activities? The reason is the fact that email automation needs a lot of pre-planning and constant monitoring along with many other challenges.

Some of the other challenges faced in implementing email automation:

Creating Quality Automation Workflows

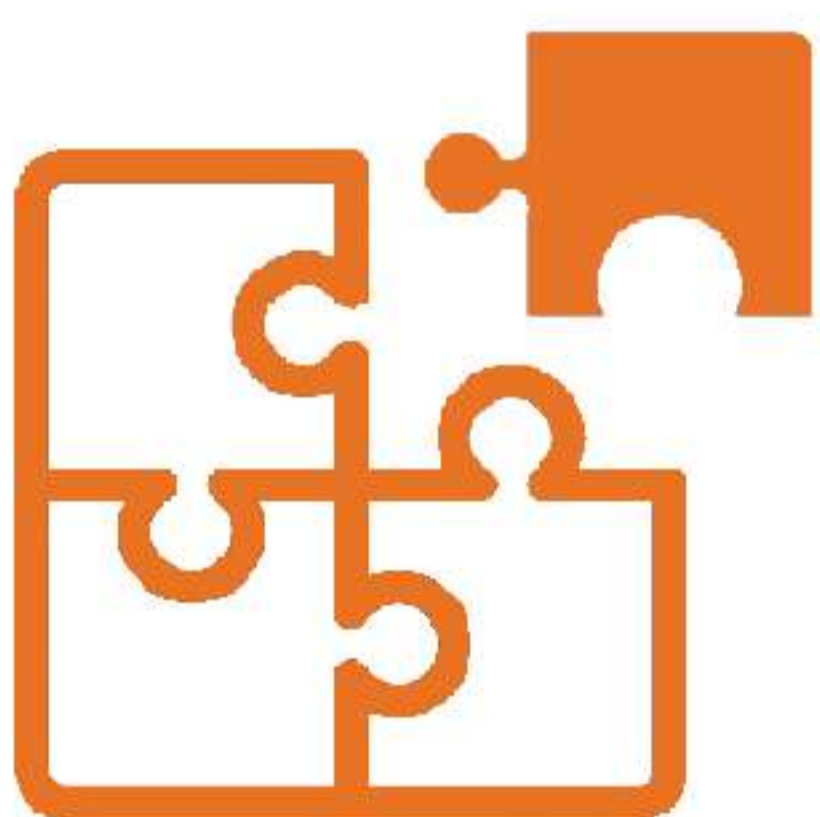


Email automation functions on the trigger conditions that you have set up. One of the major challenges that most marketers face is creating a foolproof workflow that addresses all the different kinds of customer behavior.

Workarounds

You cannot get all your email workflows correct in the first try and you can tweak the workflow whenever you find a gap in the workflow logic.

Integrations



In order to automate your email campaigns, you need to ensure the correct information is passed on to the automation tool. While you can integrate most 3rd party tools with your automation tool, it is not necessary that proper API might be available for your automation tool.

Workarounds

At the time of choosing the correct email automation tool, research into the different automation programs for the integrations they support. Do they support the integrations out-of-box? Does the support team guide with manual integrations?



Complexity

Email automation is not for the weak of the hearts. Most marketers are discouraged by the complexity of the overall email automation.

Workarounds

Don't be afraid. Beyond the initial fear of complexity lies the excitement and calmness of automation that functions like a clockwork.

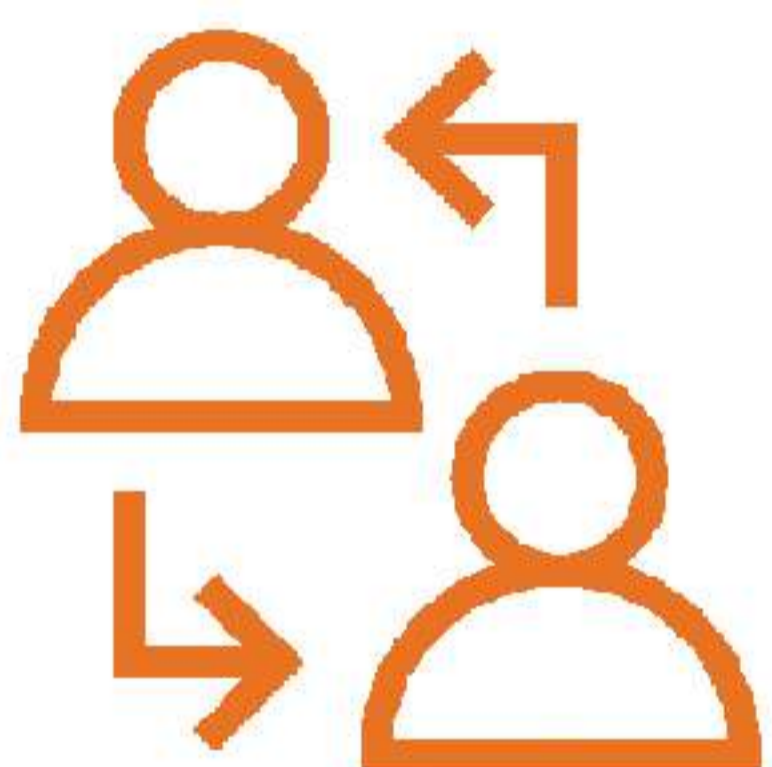


Creating Content

Depending on the workflow created, you may have to create at least two variants of emails for every stage of the workflow. With the different emails comes the task of creating the email copy for each. If the automation is for a drip newsletter campaign, it would mean that the content needs to be fresh and updated periodically.

Workarounds

Unfortunately, there is no workaround for this. Consider this to be a bitter pill and swallow it. Once you are done with content creation, the rest of the road is uphill.



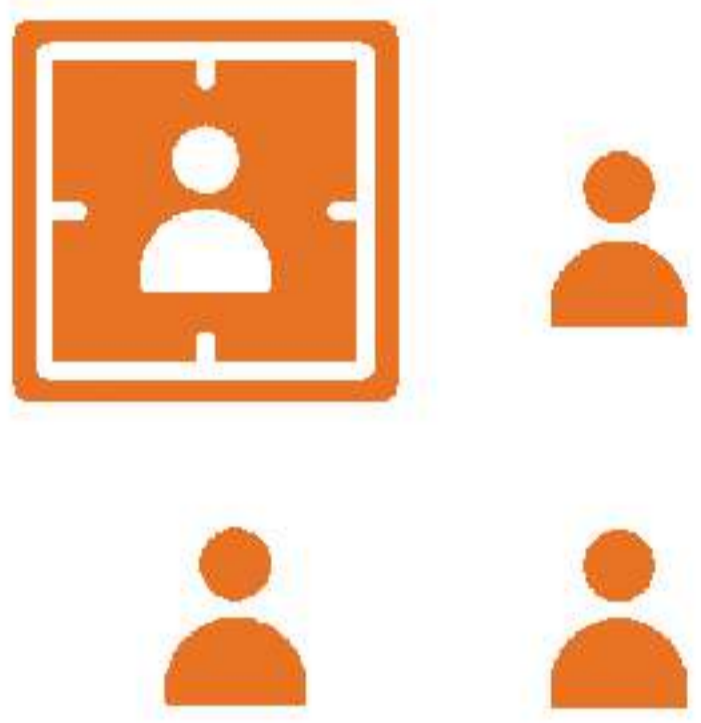
Engagement

Most email marketers are afraid of not getting enough engagement on the automated emails. Since most automation workflows are based on user side interaction, the email sent as a result as expected by the subscriber. If you observe a lack of engagement in your emails also, the culprit might be the content or the execution.

Workarounds

It is time to pull up the socks and wade into the deep waters of your email content and identify the issue. Email metrics are your best friends in this case

Segmentation



Any email automation is only as successful as the segmentation criteria implemented. The level of segmentation you can achieve depends on the amount of data you have at your disposal. The more refined you can drill down the segmentation criteria, the better the level of personalization you can achieve. The challenge that most email marketers tend to face this stage is understanding how much data is enough data.

Workarounds

The domain of email list segmentation, it is a good practice to collect as much data about their preferences, past purchases, online behavior, demographics, etc as possible without sounding intrusive.

Data management & Optimization



Data can be intimidating if you don't know how to manage it. Most marketers face issues in understanding where to start with processing the needful data and optimizing it for your email automation. This fear can lead to the fear of complexity discussed earlier.

Workarounds

The magic lies in separating the noise from the actual data. Make sure you are not collecting the same set of information from different sources. Optimization involves ensuring that the data collected is progressive in nature. E.g. If you collect the name and email address from the lead generation form, you don't need to again ask for it when the customer is filling out their profile.



Lead generation



Even though lead generation is a process that is conducted for regular email marketing activity, performing it for email automation is a herculean task for many. Synonymous with the aforementioned data management issue, email marketers are unaware of what form of lead generation tactics to implement as well as what data needs to be collected at every stage.

Workarounds

Chart out the goal of email automation. Do you need to educate the subscribers? Learn about their preferences. Do you wish to increase engagement? List the past purchase history. Do you want to re-engage inactive subscribers? Fetch the last opened or engaged email they last opened.

Reporting



How to ascertain that your email automation is a success? Most marketers have trouble analyzing and reporting the metrics of their email automation campaigns.

Workarounds

Similar to what we suggested for lead generation, by having a clear goal set for your automation campaign, you can skim down to the most crucial metrics and only measure them. Most marketers starting with their email automation tend to cover all the bases with single email automation. This results in utter chaos and too many things to look out for.






Deliverability



Email marketing is all about being permission-based. Most marketers are skeptically about losing email deliverability as the emails are sent automatically. As explained explicitly, automated emails are emails sent automatically based on pre-defined action by the user (denoting user consent). So, these emails are not considered SPAM by the ISP unless someone flags it.

Workarounds

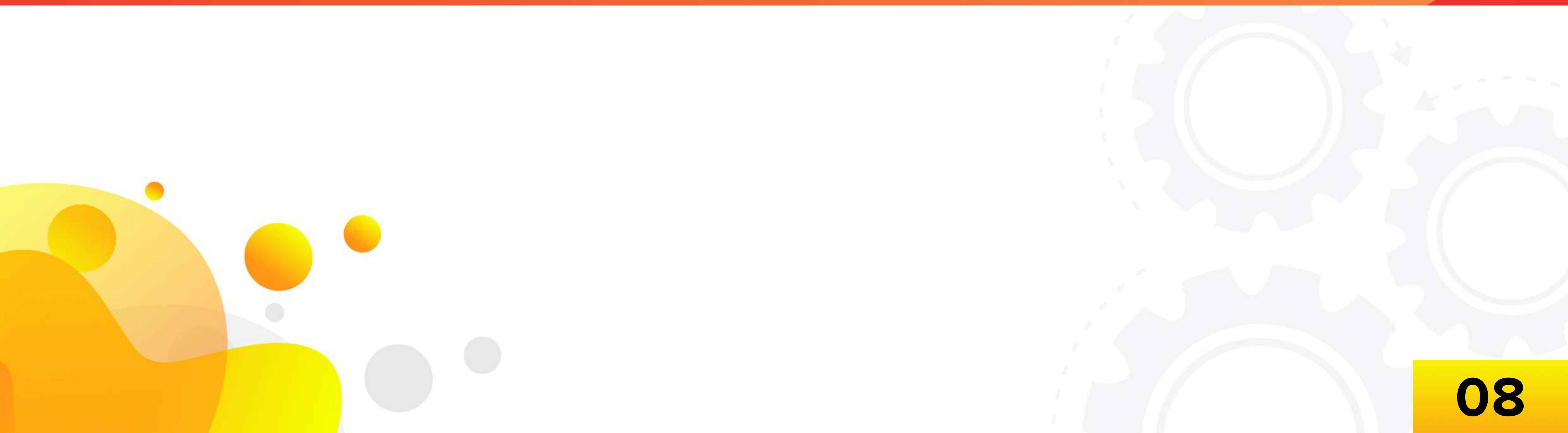
There is nothing you can do as email automation rarely affects deliverability.



Looking for some quick-fix email automation solution?

Our team of email automation experts have the expertise of setting automations in most common ESPs.

[Talk to us now](#)



Types of Email Automation

Email automation is often mistaken to be a single entity; a one-stop solution for sending different types of emails. Different types of automated emails can be broadly categorized into categories:

- Triggered Campaigns
- Drip Campaigns

Triggered Campaigns



The first emails in an email automation workflow is always a triggered email. Based on the user-defined trigger conditions set up in the automation tool, a specific email is automatically sent to the subscriber who managed to fulfill the trigger condition. Since these are timely message sent immediately, they are more prone to draw in better email marketing retention rates, increased customer engagement, improved click-through rates, and overall higher customer satisfaction. Most of the triggered campaigns are one-off emails.

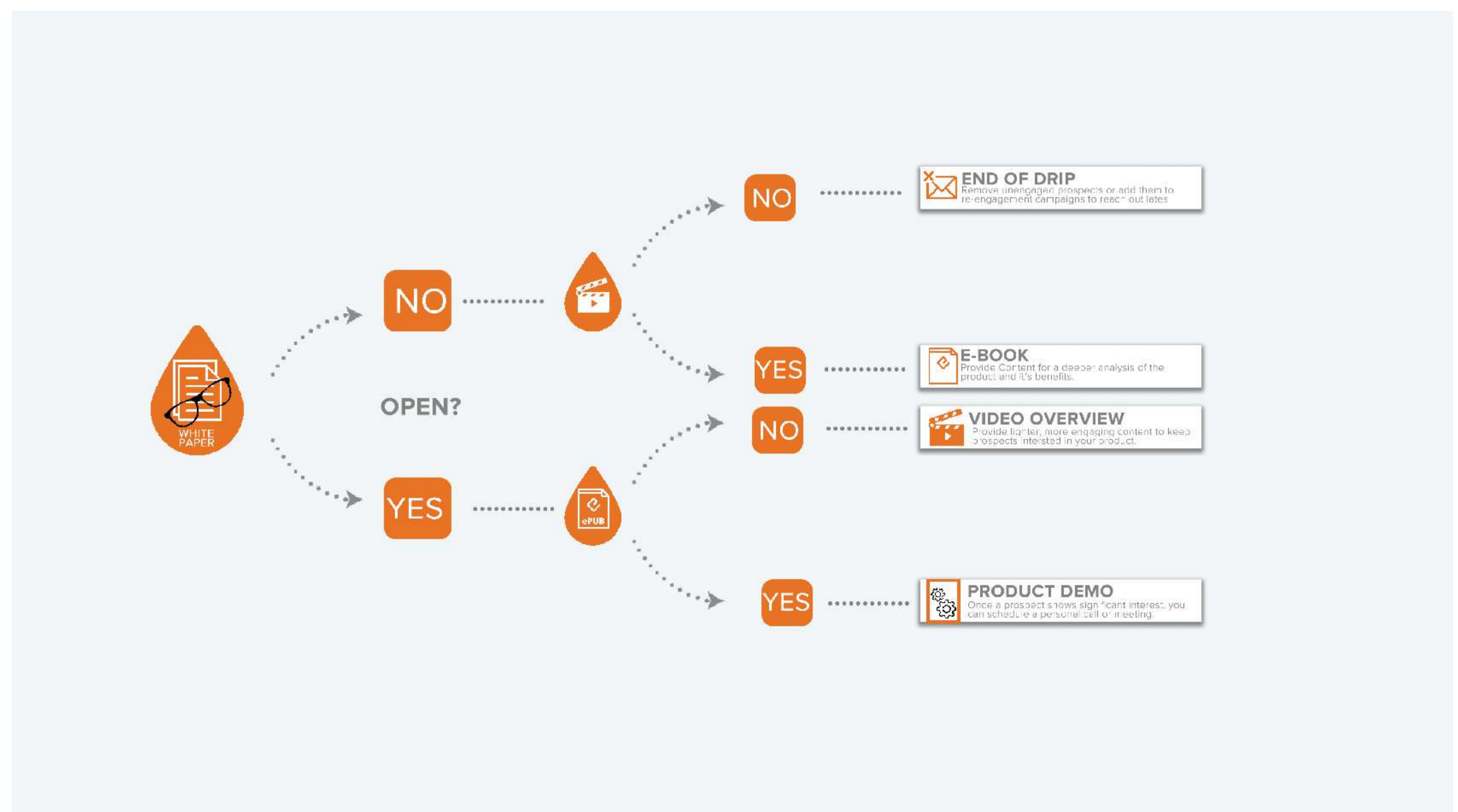
Examples of triggered email campaigns are:

- Welcome email
- Downloadable resource email
- Re-engagement email
- Cart abandonment emails
- Reorder reminder emails
- Order Confirmation emails

Drip Email Campaigns



The drip email campaigns are to email marketing what drip irrigation is to agriculture. As the name suggests, drip email campaigns are a series of emails sent at a predetermined time interval and is predominantly used to nurture interested leads into sales qualified leads. These are not directly triggered but rely on user-end trigger for the email workflow to start sending the emails. E.g. When someone subscribes to your emails, the resulting welcome email is a triggered email and lead nurturing email sent 3 days later is a drip email campaign. Depending on the outcome from the triggered email, the subscriber progresses to receive the drip emails.



Depending on the choices made by the subscriber, the drip campaign adapts and sends relevant consequent email.

Examples of drip email campaigns are:

- Welcome email
- Downloadable resource email
- Re-engagement email
- Cart abandonment emails
- Reorder reminder emails
- Order Confirmation emails

How to create an email automation workflow

The effectiveness of email automation depends heavily on the workflow it follows. If the logic behind the workflow manages to predict the actions to take for all scenarios, your automation will require less intervention in the later stages. The preparation for automating an email series begins with determining the aim of the campaign, choosing the segmentation criteria and associating suitable emails to the appropriate trigger condition.

Create a customer journey

The first step begins with determining the customer journey the subscriber is going to follow right from subscribing to the end goal which could be making a purchase, opt for service trial or setting up a meeting with your sales team. Based on the journey you chart, you divide it into 6 stages:


- **Awareness**
- **Consideration**
- **Aquisition**
- **Service**
- **Loyalty**
- **Re-engagement**

Each stage stated above is an individual email series or a combination of different series that depends on the segmentation criteria and trigger conditions as well. The condition for progress would depend on specific user behavior that is an indication of the subscriber's interest level. If someone is looking for headphones and lands on your website then the progress condition at each stage would be:

Awareness : The subscriber opens the welcome email. Clicks on the call-to-action to create their profile on your website.

Consideration : Clicks on your promotional emails, compares different headphone models and may place some in their cart but won't purchase.

Aquisition : The subscriber opens the cart abandonment email and completes the purchase.

- 
- Service :** Provides a product review and gives a rating to their customer experience.
- Loyalty :** Refers to their peers in order to gain the referral bonus from the anniversary email you sent.
- Re-engagement :** Not all subscribers are going to remain ever-engaging. The re-engagement stage has you send emails to dormant customers with the hopes to re-engage them and make them active again. Quite a crucial stage to

Set up Segmentation criteria & Trigger conditions

As we stated earlier, email automation automates the repetitive process of sending emails based on the triggers. Triggers can be any kind of user behavior that satisfies a pre-defined condition. Some of the common trigger conditions are

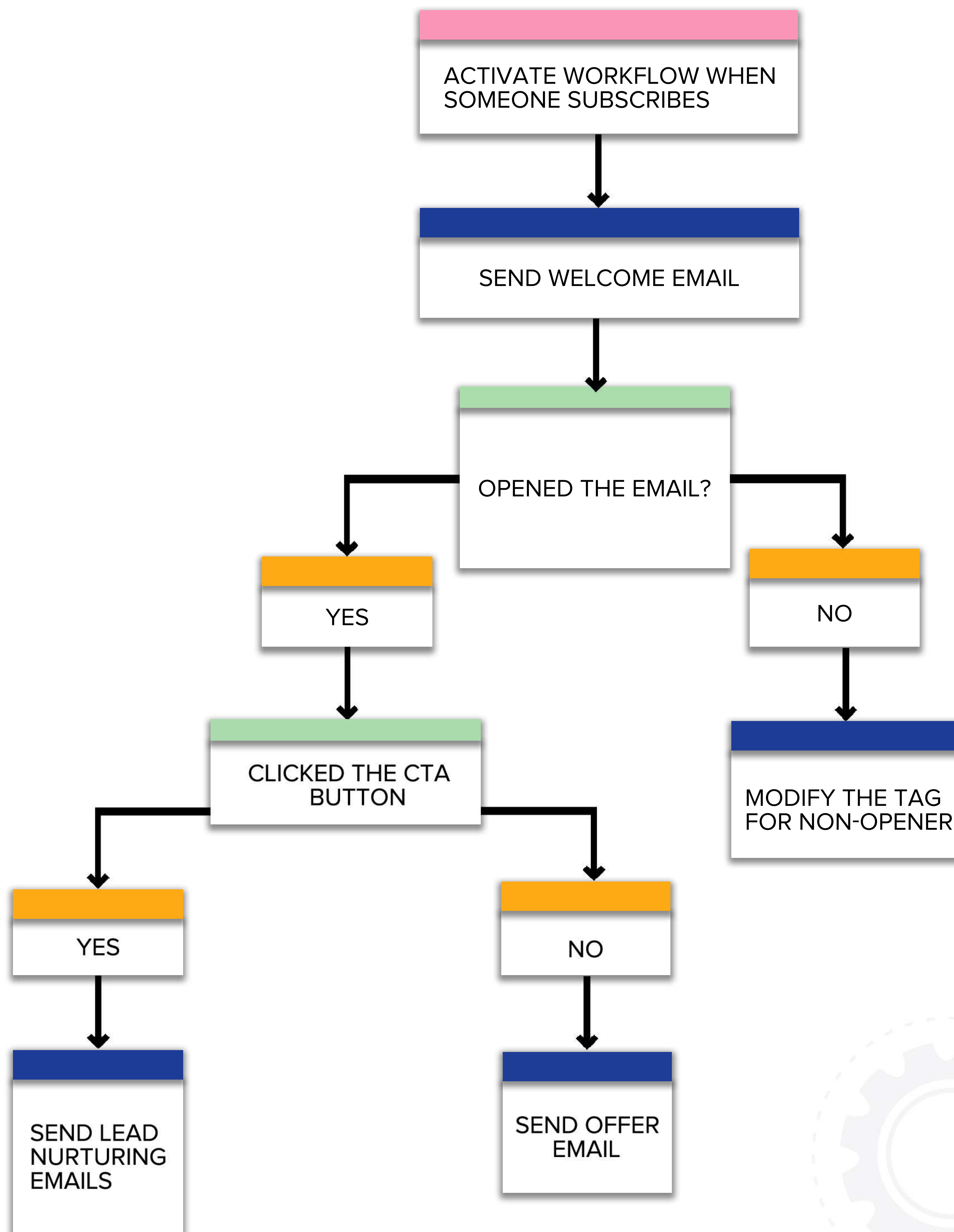
- **Opt-in**
- **Unsubscribe**
- **Form submission**
- **Message opened**
- **Message clicked**
- **The user data was modified i.e. profile updated, buyer's journey progression, etc.**

In order to make sure that the correct message reaches the correct audience at the correct time, you need to segment your mailing list accordingly. Segmentation paired with trigger helps you craft emails that are not only personalized to the user's action but also to the customer's information. Some of the common segmentation criteria used pre-dominatingly in email automation are

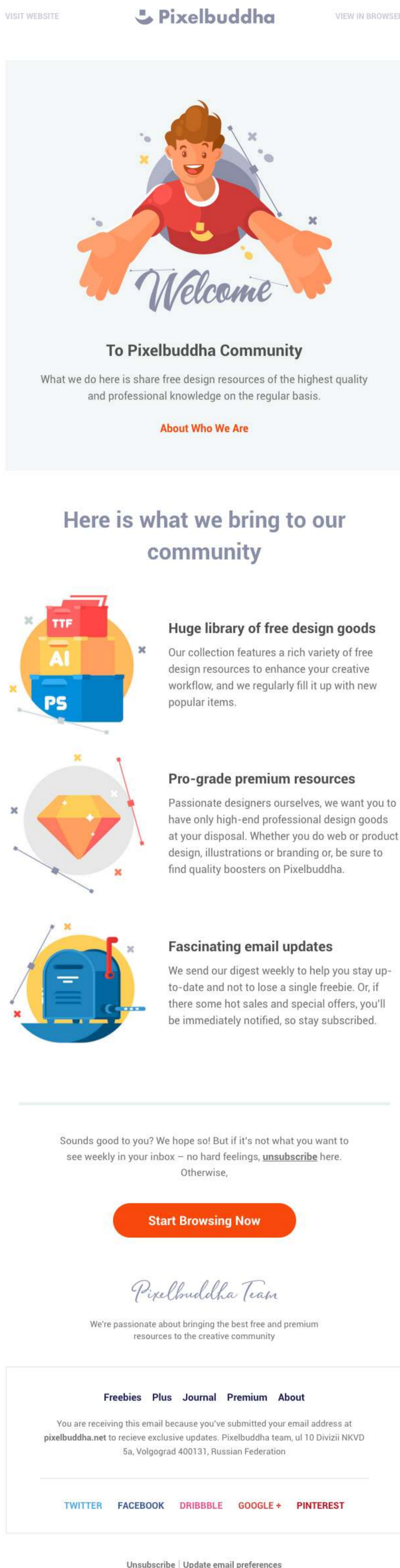
- **Demographics such as age, location, gender**
- **Newly subscribed**
- **Engagement rate**
- **Latest Downloaded Resource**
- **Purchase history**
- **Customer Lifetime Value**
- **Purchase Frequency**

Conditional pathways

In order to work correctly, any logic needs to have both aspects i.e. the 'if' condition and the 'else' condition, specified. The same applies to email automation workflow, at every stage of the workflow, there needs to be conditional pathways that explain what the program needs to do depending on the user-end interaction. Taking our earlier example of someone subscribing to purchase headphones, the onboarding workflow with conditional pathway would be:




Email automation example:



Welcome series

A welcome series is most elementary yet important email that a marketer needs to have in their toolkit and easiest campaign to set up as an email automation. Welcome email is the best place to set up expectations as this is the first interaction of your subscribers after subscribing. Whether you send a single email or set up a welcome email series, the overall goal needs to be revolving around greeting new subscribers, provide them with the incentives they were promised on subscribing and directing them towards further engagement.

For a single welcome email, the email copy needs to verbally welcome the prospect to your marketing family. In this email, the prospects will be introduced to what the brand is about and what they can expect from your emails. In the example below by PixelBuddha, there is a prominent hero image followed by a list of benefits the subscriber would get. The email ends with an actionable call-to-action to start 'Browsing Now'.



In case of a welcome email series, the emails need to progressively introduce the subscriber to your brand and the problem-solving services or product you offer.

Assuming you are planning to send 4 emails as a part of your welcome email series, the content in each email can be distributed across in the following way:

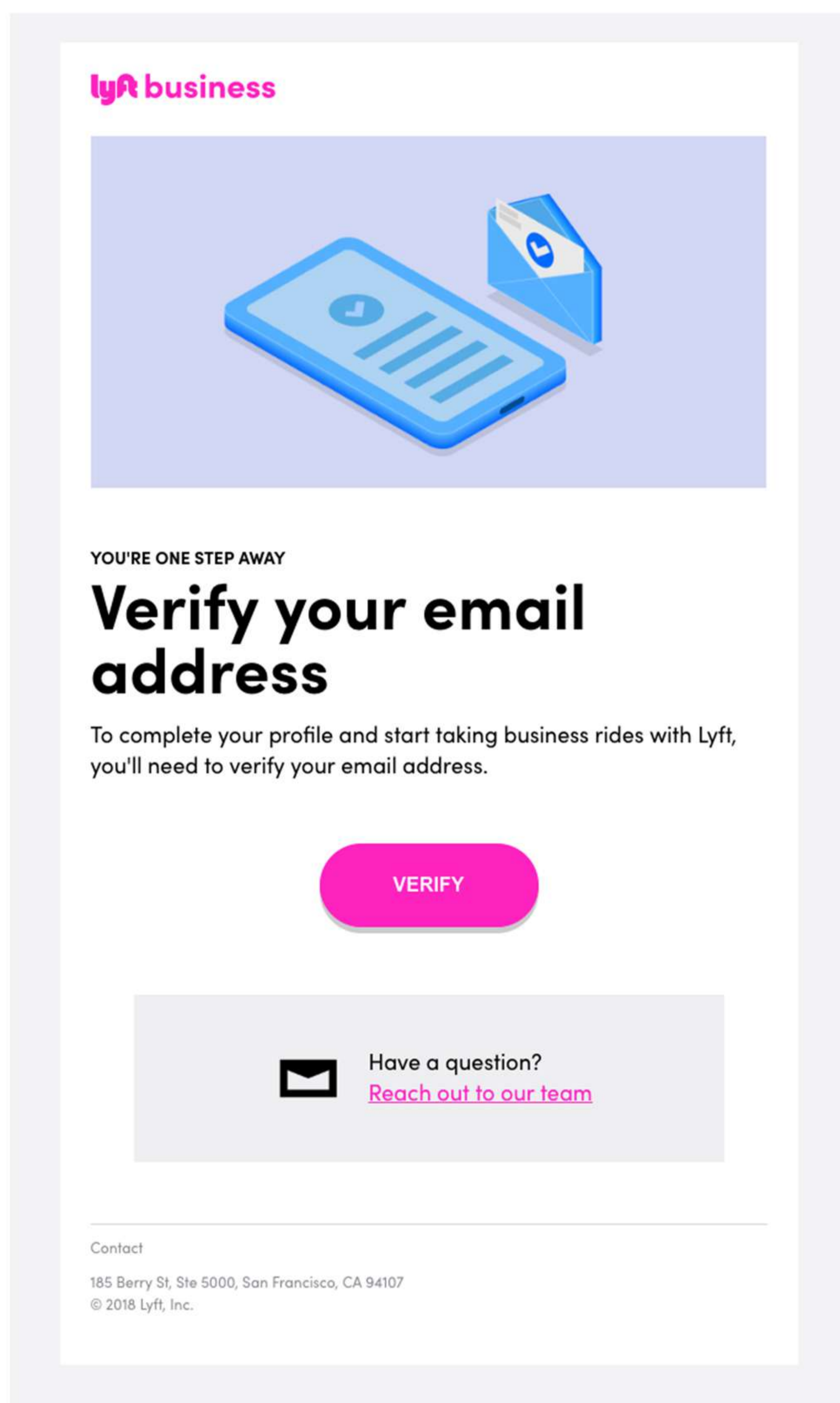
First Email: Welcomes the subscriber and thanks them for subscribing

Second Email: Introduction to your products or services and background about your brand

Third Email: What to expect from the brand. This email will list out all the pain points the subscriber may be facing and aligns them with your solutions. Inclusion of some testimonials can work wonders

Fourth Email: Getting introduced to the subscriber. Complete your profile or relevant freebie can be offered here

There is a chance that some of your subscribers may not engage with any of the emails listed here. This is a sign of times to come and such subscribers need to be kept in a separate list where they need to be nurtured further before being removed. They may have subscribed unintentionally or are no longer interested in the content.



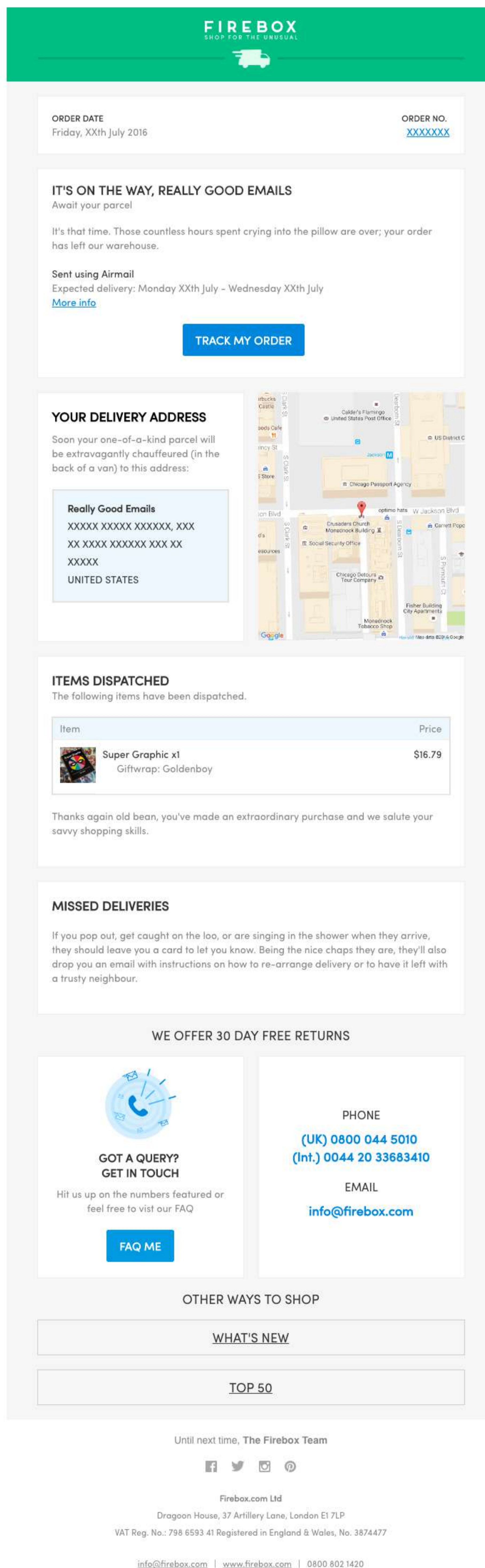
Double Opt-in emails

Double opt-in emails are considered to be the most effective way to make sure that someone who subscribed is genuinely interested to be a part of your mailing list. The subscriber is required to click on a link on the confirmation email, they received on signing up. This is a double-edged sword as your subscriber may not like repeated act of subscription confirmation and this may result in quick unsubscription.

Irrespective of where you stand regarding the number of opt-ins your subscribers need, double opt-in email series has a opt-in email and an optional verification confirmation email.

As you can see in the email example below by Lyft, the email copy is crisp and to the point. What is worth noting is that they specified the email address in the email copy which is a good user experience tactic

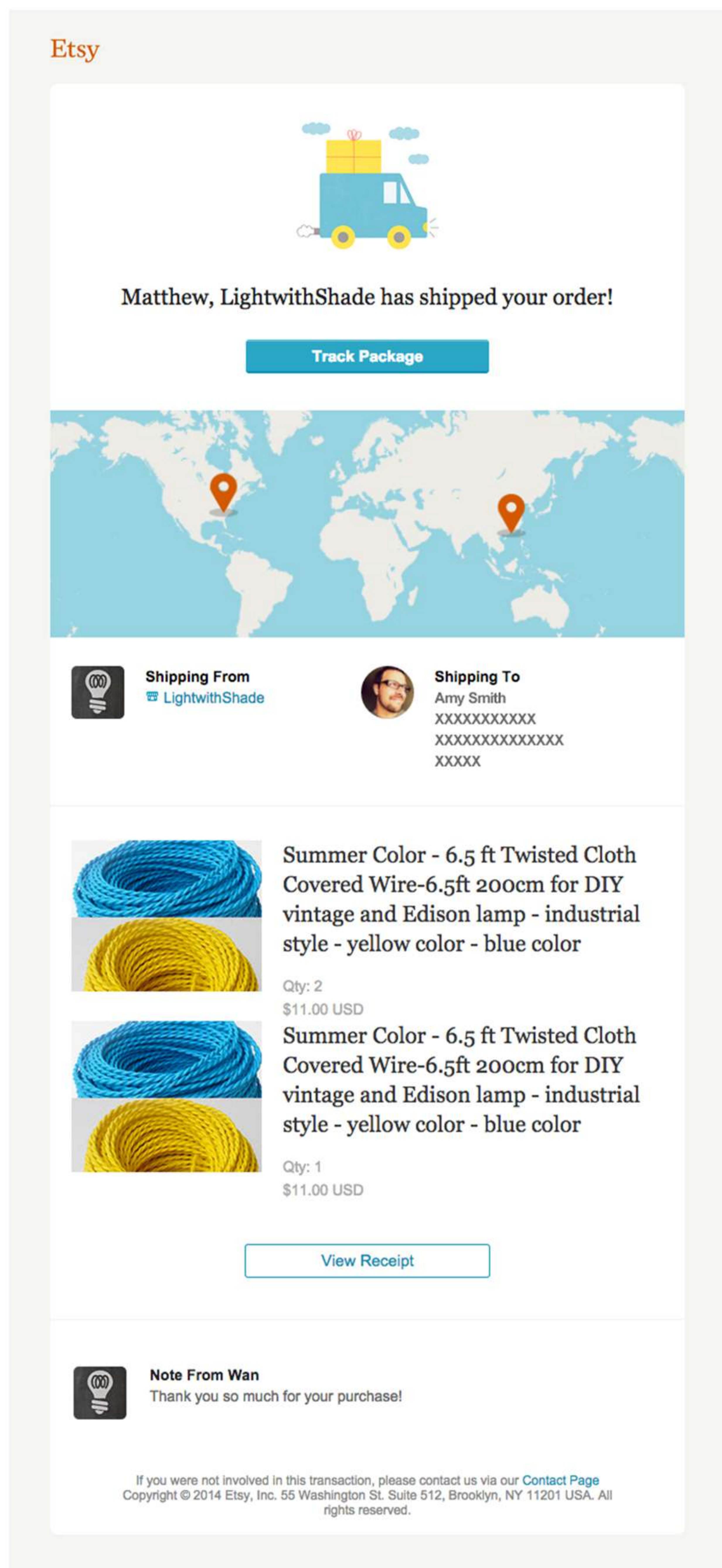
Transactional emails



Order Confirmation Email

The core transactional email in itself, the order confirmation email acknowledges the customer about the purchase success. The order confirmation email not only informs about the order placement but also about delivery dates, price breakdown, order number, and whom to contact for any issues raised. Promotional activities such as upselling and cross-selling can be done in this email to an extent.

In the example below by Firebox, the email content informs all the information mentioned above along with links to their other products in the footer.



Shipping Detail Email

The shipping detail of the order placed can be featured in the order confirmation email or sent individually. Some brands tend to feature it in the same email and some tend to separate both. Shipping detail email is generally sent when the shipping company is different from the brands selling the product. Either ways, it is important to add a link for the customer to track their order, along with information on the point of contact for any issues arising.

In the example below by Etsy, the shipping details, the sender details, and the product images are featured for easy understanding of the customer.

TAYLOR STITCH

Order #650050

Your order is on the way

Your order is on the way to you. Track your shipment to see the delivery status.

TRACK ORDER

INITIATE RETURN

Customer information

Shipping address

Smiles Davis
600 Montgomery St
San Francisco, CA 94111
United States

Billing address

Smiles Davis
600 Montgomery St
San Francisco, CA 94111
United States

Shipping method

Free Ground Shipping

Order summary

Shipping Immediately

Make some room in your closet — all the items below have shipped. Feel free to reach out with any questions or concerns you may have.



The Winslow Parka in Navy
M - 40 x 1

**Responsibly Built
For The Long Haul.**

Shop
Workshop
Last Call
The Dispatch


About
Account
Help



Product Receipt


Even though the order has been delivered to the intended customer, it is a good practice to send an order delivered or product receipt email. This email can be used as a 'thank you for placing order' greeting and can help your email sound human.

share your thoughts.
post a review on Target.com




Hi Smiles Davis,
Help other guests make a more informed purchase. You can post your review in just a few steps.

help others!



Storage Cart - White - Room Essentials™

[write a review](#)



Organic Sheet Set (Twin) Blue Geo - Threshold™

[write a review](#)

[target.com](#) [find a store](#) [privacy](#) [help](#)

This email does not guarantee that the item is currently available. You can find updated online and in-store availability when you view item details.

This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.

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Review / Feedback Email

Your communication with your customer doesn't end with the purchase. In order to continue engagement, sending a review or feedback email is a good tool. This not only creates an opportunity for user engagement but also for brand advocacy. Send such emails after waiting for 10-15 days after the order was delivered for a more honest review. Avoid any promotional content in this email as it can be distracting.

In the example below by Target, the email copy is humble enough while asking for review. Also, they have shown how the review will benefit other shoppers. This adds a social responsibility to the reader and this would enhance the chances of reviewing.



HEY JACKSON WE THINK YOU MAY
NEED A REFILL



We were told that you ordered some awesomeness a few days ago and we would hate for you to run out so this is our way to help you get more energy.

LAST TIME YOU ORDERED:

Rockin' Wellness Sale!
1 Month Supply

Price: \$34.99

GET SOME MORE

GET FREE U.S. SHIPPING ON YOUR ORDER TODAY

Let us know if you have any questions. We're here to help!

Natural News USNews Splash magazines VegNews natural awakenings

Copyright ©2015 Rockin' Wellness. All rights reserved.
150 Oser Avenue #11354, Happaage, NY 11788



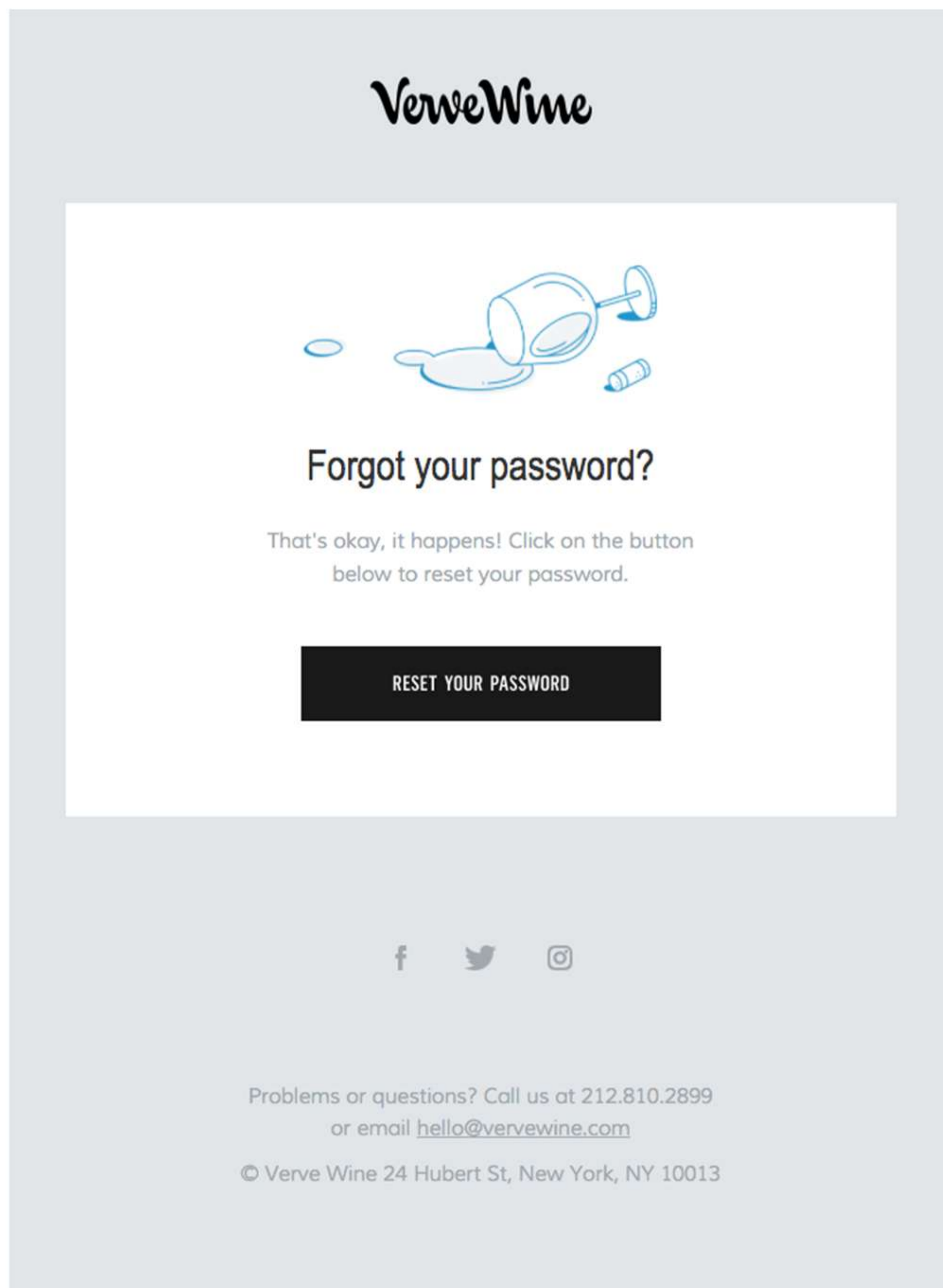
Don't want to receive these emails? We respect your inbox.

UNSUBSCRIBE

Re-order reminder Email

Another post-purchase re-engagement opportunity is the re-order or replenishment emails. Applicable for subscription-based products, the replenishment emails are a great way to remind the customers about the upcoming deadlines. This way they can take action and continue being associated with your brand.

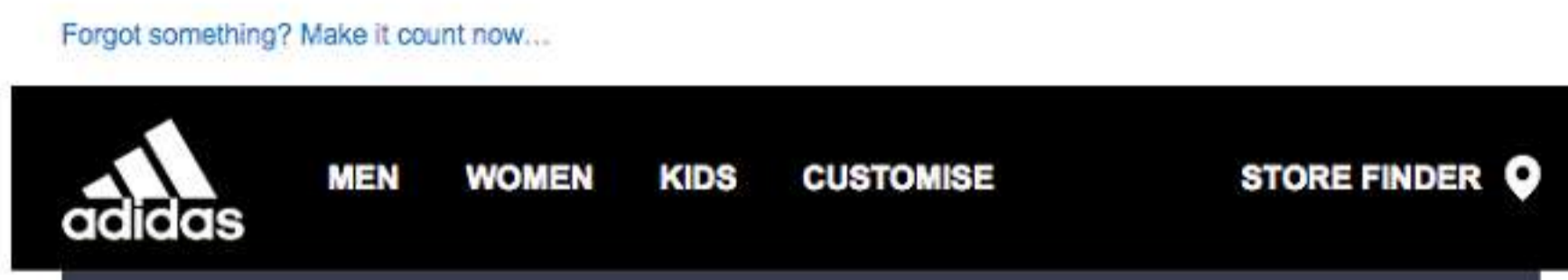
In the email example below by Rockin' Wellness, they have displayed the product along with the price and the link for re-ordering for the ease of the subscriber.



Password Recovery or Profile update email

Any changes the customer makes to their online profile is also considered transactional and needs to be given equal urgency as other transactional emails. Such emails need to help the recipient to complete the aforementioned actions as easily and quickly as possible. So, the design needs to be minimalistic and to the point.

In the example below by VerveWine, there is no additional fluff as the email copy is straightforward and minimal.



IS YOUR WI-FI OKAY?

Maybe your browser crashed when looking at the iconic Gazelle silhouette. You don't want to miss out on this staple item in your collection. Think we're biased? Check out some reviews below. Didn't like any of the colours or designs? Feel free to customise your own model with miadidas and step out in style.

[SHOP NOW](#) [CUSTOMISE](#)

WHAT'S THE WORD?



★★★★★

Excellent, well made and comfy. Can't go wrong with Gazelles.

supdoc

★★★★★

Timeless classic.

MattyC

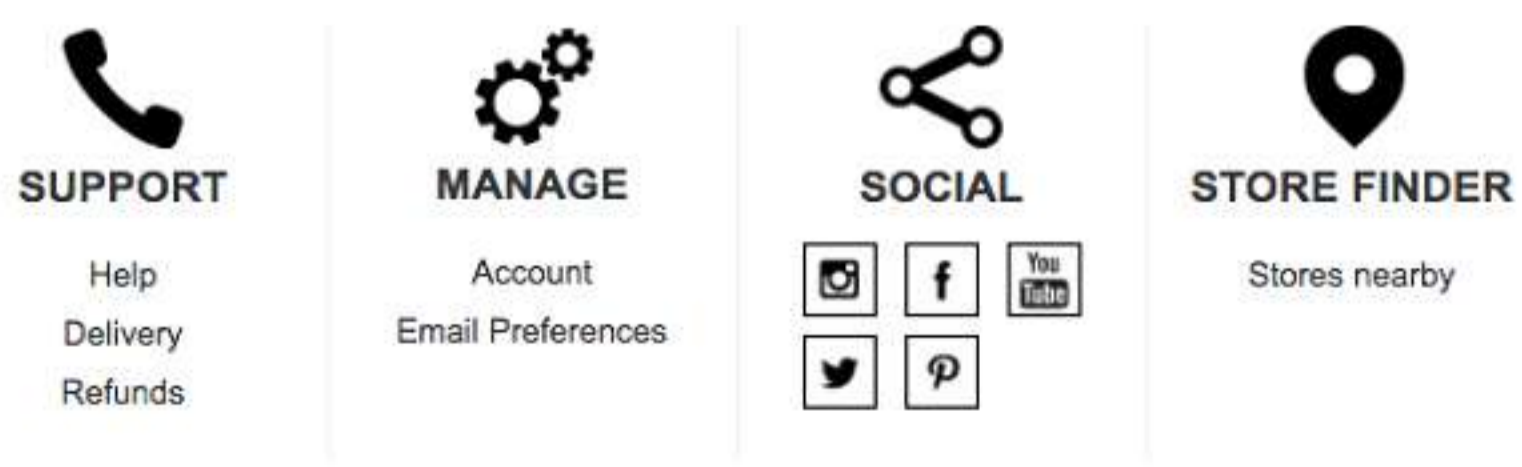


★★★★★

Retro inspired genius. Style personified.

Gb072

[EXPLORE NOW](#)



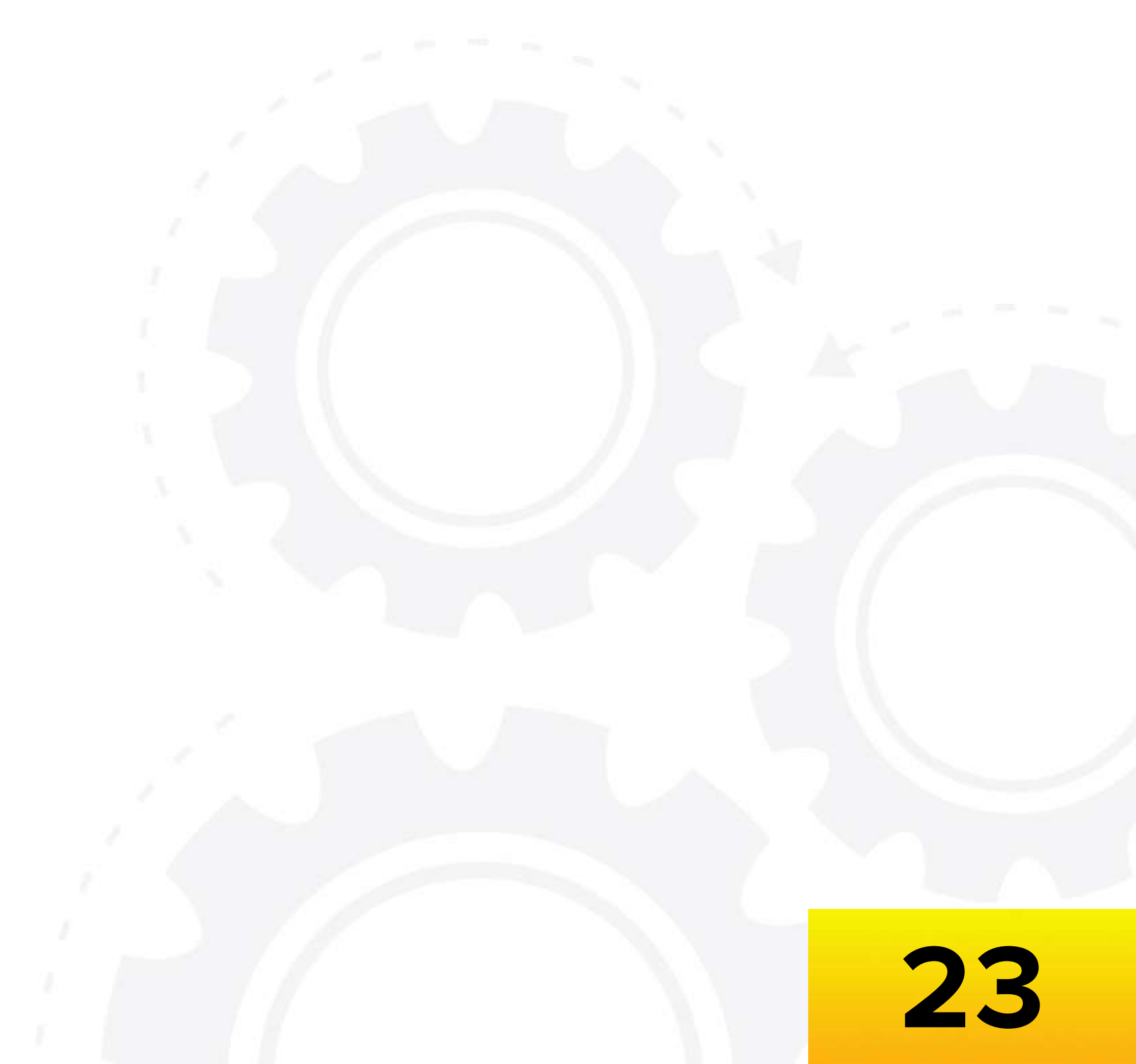
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Cart abandonment emails


The end goal of any business is to draw in the sales. It pains when a customer places an item in their digital cart, only to abandon it owing to any reasons. Cart abandonment emails are a miracle in such situations as they act as reminders. The email copy for a cart abandonment email needs to be actionable and create urgency. It serves as a good user experience when you also include details of the abandoned products along with images.

images.

In the example below by Adidas, they adopted humor in their email copy and also featured testimonials for additional trust building







LOG IN & EXTEND TRIAL

Introducing the New Facebook Pages Report

LOG IN & EXTEND TRIAL








sproutsocial
THE NEW FACEBOOK PAGES REPORT

We're excited to announce Sprout Social's new Facebook Pages Report. This report includes new data and visuals to analyze trends in audience engagement, message volume, paid activity, demographics and more.

[Log in and extend your trial](#) to view your report.

Key Features


-  New engagement data: impressions, reactions, video views and clicks.
-  Calculate ROI of paid vs. organic posts.
-  Analyze activity across multiple Facebook Pages.
-  Better understand and target your audience with new demographic data.
-  Export the Facebook Report in Spanish and Portuguese.

LOG IN & EXTEND TRIAL

[Learn more about the Facebook Pages Report.](#) And as always, stay tuned for more updates, and contact us with any questions.

Patrick Cuttica
Product Marketing

sproutsocial.com 1.866.878.3231 info@sproutsocial.com



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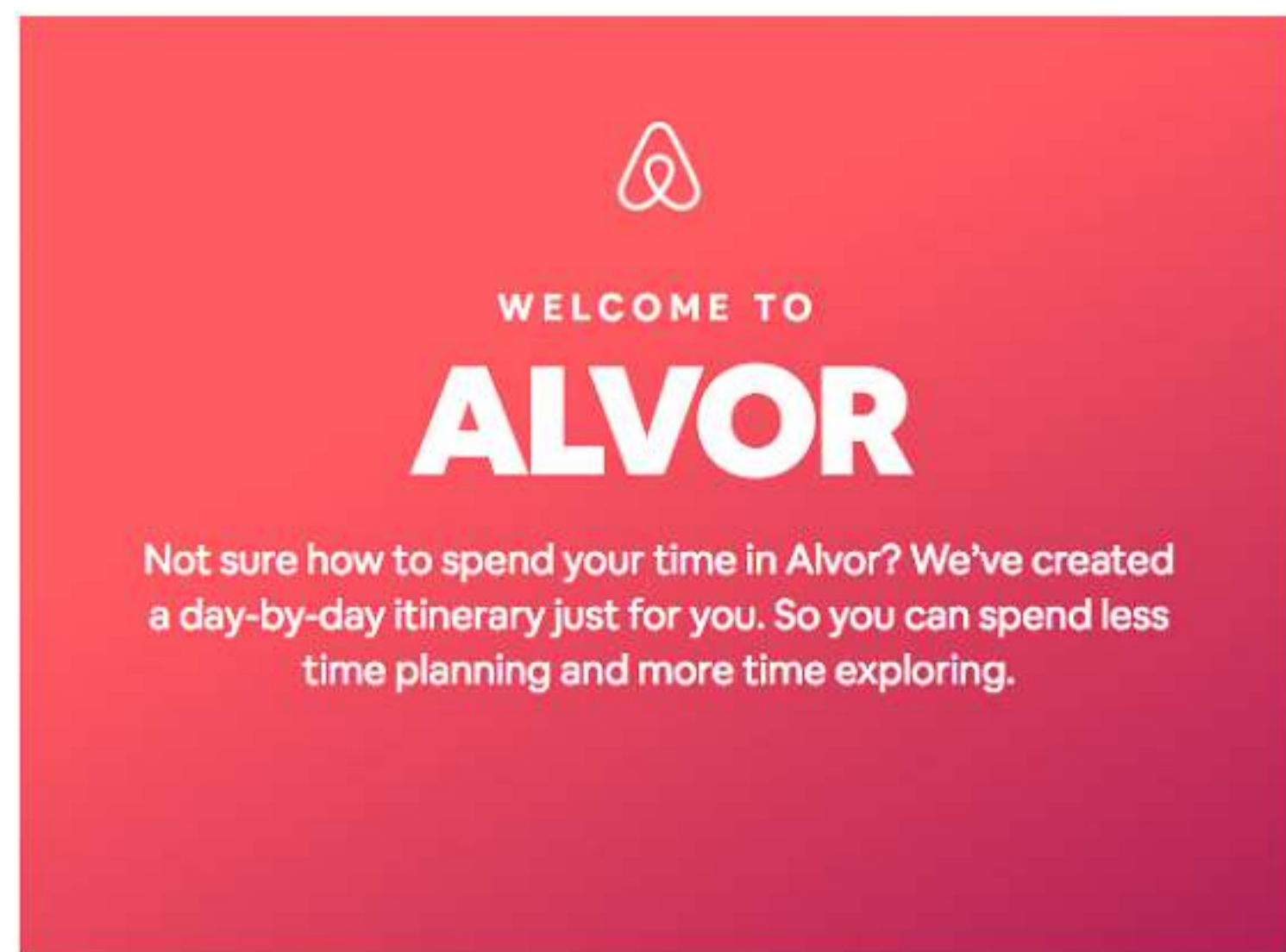
Sprout Social, 131 S Dearborn St., Chicago, IL 60603, [Unsubscribe](#)

Lead Nurturing emails

As the name suggests, the purpose of lead nurturing emails are to 'nurture' your leads. Lead nurturing emails are a series of emails that will introduce the different products and services to your leads who are right now in the consideration stage. These emails will progressively educate the subscribers about the reasons for their pain points and demonstrate how your products or services can provide a solution.

In the example below by Sprout Social, the email highlights all of the advantages of one of their services. Those interested can click on the CTA to learn more and extend their trial period





Jun 23

Saturday

Your first full day of exploration! You won't want to miss the landmarks, but you can make those visits even more special with a local as your guide.



10:00 AM - 12:00 PM
Lagos Kayak Cave Excursion
7.9 kilometres away
★★★★★ 5 reviews



9:00 AM - 11:00 AM
Explore Wild Beaches & Caves kayaking
20.0 kilometres away
★★★★★ 10 reviews



9:00 AM - 1:00 PM
Albufeira Jeep Safari - Half Day Tour
38.9 kilometres away



4:00 PM - 6:00 PM
Stand Up Paddle along Hidden Caves
19.8 kilometres away

[Show all](#)

Jun 24

Sunday

After you've seen the sights, your next stop will be the city's local hot spots. Discover how the locals live with one right by your side.



6:00 AM - 9:00 AM
Sunrise SUP into Caves & Grottos
8.4 kilometres away
★★★★★ 60 reviews



9:30 AM - 11:30 AM
Algarve Style Photo Shoot
28.0 kilometres away
★★★★★ 1 review



3:00 PM - 4:30 PM
Capoeira with Cuban Master
48.5 kilometres away
★★★★★ 1 review



6:00 PM - 9:00 PM
SUP Lake Bravura
8.8 kilometres away
★★★★★ 2 reviews

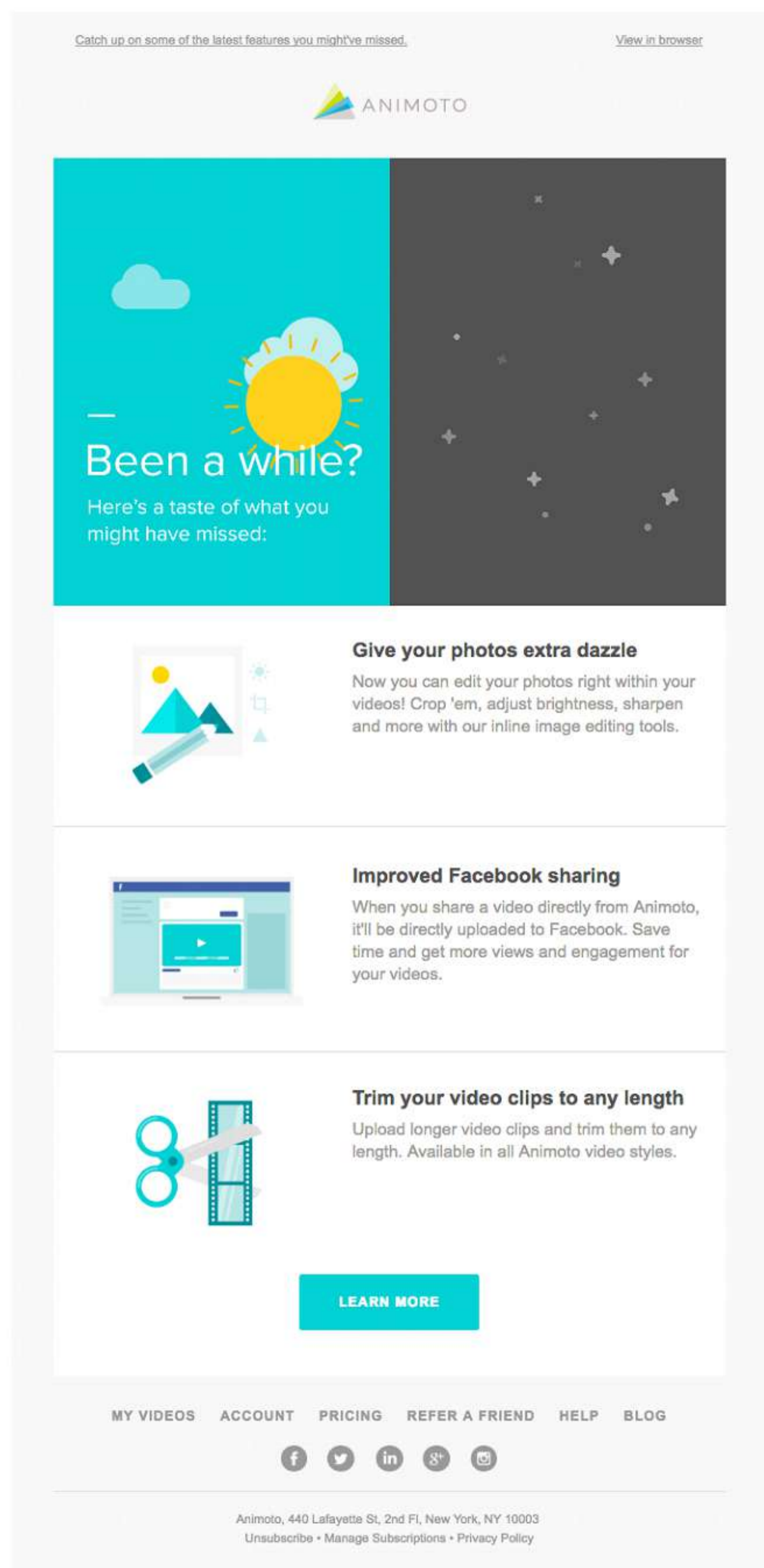
[Show all](#)

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Airbnb, Inc., 888 Brannan St, San Francisco, CA 94103
[Unsubscribe](#)

Recommendation emails

The recommendation email is an upsell opportunity as this reflects your expertise. No one knows your products better than you and when you suggest products based on their past purchase (using a recommendation engine), you improve the customer experience. The email layout for a recommendation email is a grid of related products along with some real world photographs of your products.

In the Airbnb email example below, the email suggests things to do based on the booking made by the subscriber. By displaying relevant imagery, the subscribers would be more inclined to interact with the email better.




Re-engagement emails


Email list decay at a rate of 22.5% yearly. This means your subscribers are bound to go inactive someday soon. This may or may not be due to some fault of yours, but a timely re-engagement email can help you pull back your dormant subscribers. The overall logic for transferring someone into the re-engagement workflow is targetting those who haven't opened the past 5 email campaigns. The email copy, including the subject line, needs to have actionable words while targetting the reason for dormancy.

In the example below by Animoto, the reason for dormancy was identified as inactivity and the email copy jumps right into listing out features that might raise the interest level of the customer. Notice how the headline itself addresses the issue? The call-to-action also hints that by clicking the subscriber can learn more about the features.



BOMBAS 

SHOP DISCOVER BOMBAS CONTACT



REFER A FRIEND
GET FREE SOCKS

HERE'S WHAT WE KNOW:

1. You like Bombas socks
2. You know people

HERE'S WHAT WE THINK YOU SHOULD DO:



1. Refer Bombas to people you know
2. Those people place orders
3. Those people get a discount on their first order
4. You get free socks*
5. Every time, as many times as you want


No catch. Just people helping people discover the most comfortable socks in the history of feet.

HIGH FIVE!

REFER A FRIEND HERE





*FREE PAIR VALUED AT \$11.00

 **FREE SHIPPING ON ORDERS OF \$30 OR MORE** |  **100% MONEY BACK GUARANTEE**

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BEE SOCIAL

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Referral Emails

The success of any business depends on the repeated order it gets, but your existing customers can also bring in new customers through referrals. While brand advocacy depends on the user experience the customer has had to date, with correct trigger logic referral emails can be sent to those customers whose lifetime value (LTV) crosses a pre-set limit.

In the email example by Bombas, the email copy acknowledges that the customer loves their products and then motivates them to refer their products with peers.



Tools to integrate with your Email automation

Email Automation is not possible using only an Email Service Provider and a CRM. Email automation is a result of seamless harmony between multiple tools and integration of them with your ESP. The following are some of the tools you need to integrate with your email automation.

List Building



You need email addresses of your prospects to send them emails. In order to do so, you need to integrate your list building tools with your CRM and in turn with your email automation. You display lucrative lead generation resources such as ebooks, freebies, trial offers to motivate interested prospects, using a list building tool, to subscribe.

Some of the most popular list-building tools are OptinMonster, Optimizely, Unbounce, Facebook ads.

CRM



Next in the line comes the Customer Relation Management software (CRM). These tools collect the incoming lead information from different sources and create individual profiles for every lead. CRMs are also powerful enough to categorize your leads into pre-defined customer personas.

Some of the commonly used CRMs are Infusionsoft, Zoho, Freshsales, Salesforce.

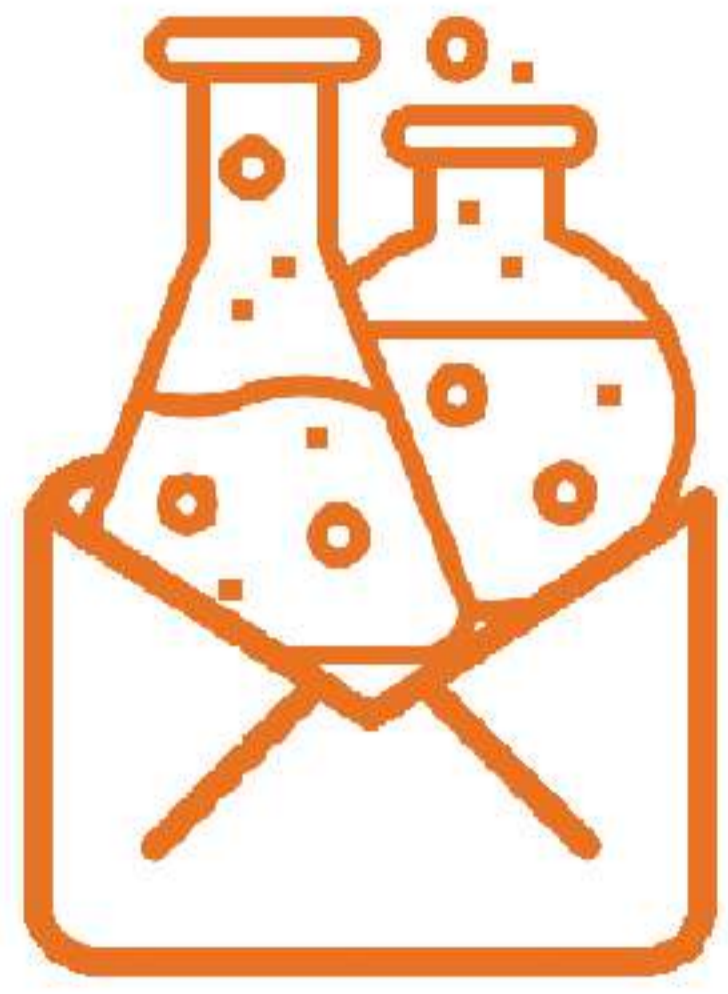
Email Marketing Software



The tool you use to send the actual emails to your subscribers. Commonly called Email Service Providers (ESP) also, you set up your email automation workflows here as well as manage your email lists. Any email templates you create are uploaded to your ESP while setting up email campaigns.

Some of the well-known ESPs include Pinpointe, Moosend, ActiveCampaign, Campaign Monitor.

Email Testing Tools



Email templates are the core of email marketing. Any issues in the rendering of an email template and it can ruin the customer experience. This leads to lowered customer engagement and may result in unsubscribes. Email testing tools such as Email on Acid and Litmus test your email templates for rendering issues and broken codes.

Drip Email Automation tools



As we explained earlier, drip email involves sending emails that progressively nurtures interested leads into sales qualified leads. The tool you use for drip email campaigns needs to constantly monitor the metrics of the email for short while after the email is sent.

Drip is a tool that, as you might have guessed, can streamline the drip email process.

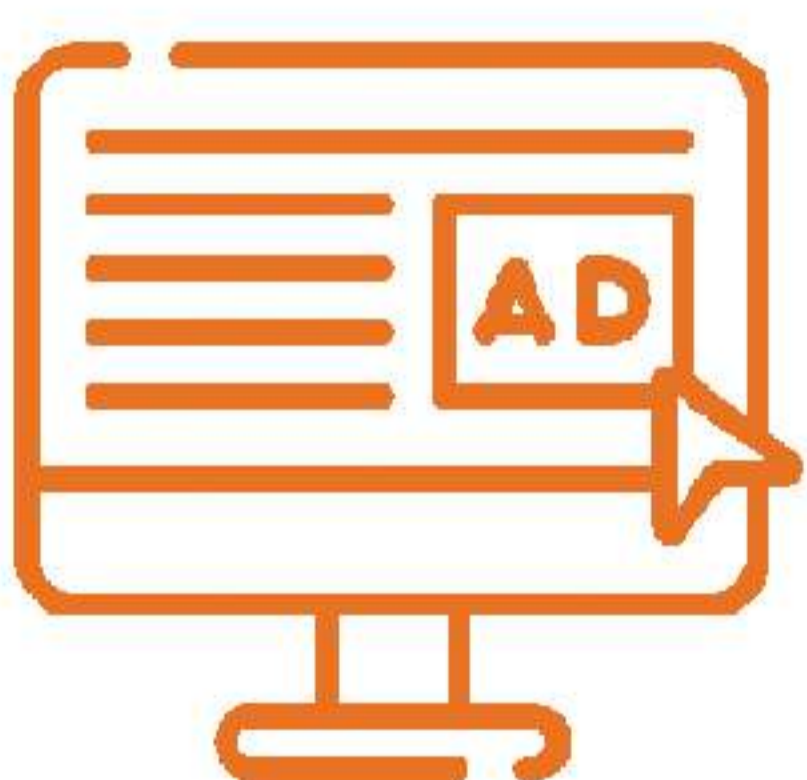
Tracking and Analytics Tools



Email automation is only possible based on the interaction and response of the subscriber. So, it is important for tracking the email performance and your website visits as well. Most ESP provide tracking and email metrics for individual campaigns.

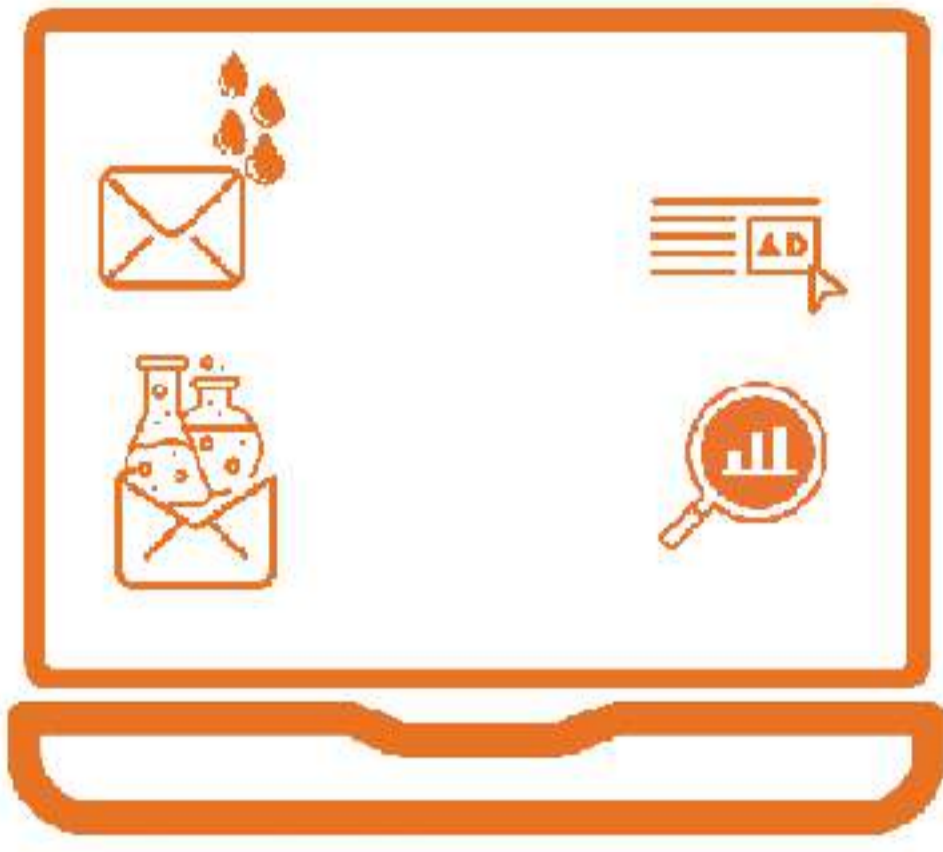
For tracking the website analytics, Google Analytics are one of the best tools. Some other tools include Moz, SemRush, and Clicky.

Display Ad services



Display ads are an integral part of digital marketing toolkit and can greatly help in re-engagement and cart abandonment email automation. AdRoll is a great tool that is helpful for retargeting customers through re-engagement on Facebook, Twitter, and the web.

All-in-one



The all-in-one is a swiss knife that has all the above mentioned marketing tools rolled into one platform. The benefit lies in centralized platform that doesn't require any additional configuration and no risk of data leaks or incompatibility.

Some of the popular All-in-one marketing tools are Marketo, Hubspot, Campaign Monitor.

Looking for some help with email automation?

We can be the extension of your existing team and help you set up easy-to-follow email automation campaigns in quickest turnaround time.

Talk to us about Outsourcing



Email Automation Best Practices

Map out your lead stages



The primary way marketing automation helps you grow is by generating leads and nurturing them through to conversion, so they become customers. To do so, you need to map out the various stages a lead passes through on its way to qualification and conversion.

Lead scoring



You need a lead scoring process in place to determine when a lead is marketing qualified and ready to pass to sales. You can score leads based on both demographic attributes (such as job title, industry, level of seniority, etc.) and behavioral actions (such as opening and clicking an email, downloading content, visiting high-value web pages, etc.).

Lead qualification process



Once your lead scoring mechanism is in place, you must determine a lead qualification threshold. In other words, the number of points a lead must accumulate to be considered an MQL and be passed over to sales.

Establish fast-track/automatic qualification



In your scoring and qualification process, you should include a fast track to qualification. Certain actions taken by leads indicate an undeniable propensity to purchase your product or service. These actions include requesting a demo, signing up for a free account, or anything else that you feel indicates a propensity to buy for your unique business model.

Set up triggers to streamline lead progression



With the use of system triggers, you can set in motion automated actions when certain events take place. For example, when a lead becomes marketing qualified, you can use system triggers to automatically create a task for sales to follow up, update the lead stage to MQL, pull them out of any ongoing nurture campaigns, and so on. You decide which actions should take place, and when.

Personalization, segmentation, and targeting



Marketing automation solutions store lots of contact data. But when you use an all-in-one CRM, which includes sales, marketing, and customer support automation on the same platform, you have much more data at your disposal.

Use that data to segment contacts into groups with similar attributes. Leverage it to personalize emails and other messages to your contacts. With so much data available, you can create targeted email marketing campaigns that only go to certain segments and speak to the pain points of that particular segment.

For example, if you want to target white space in the real estate market, you can create a campaign that speaks to the pain points of that industry, using that industry's lingo. The same campaign wouldn't be effective if you sent it to leads in the career services industry



Wrapping Up

Email automation may seem overwhelming when starting out. Once you have a basic wireframe created for your email workflow, you have taken a step in the correct direction. The time you spend in creating a workflow and the relevant email templates for email automation campaign, is a one-time investment that provides great returns in the form of increased lead quality, better conversions, higher customer delight and retention.

While we have covered everything related to email automations, our expertise about setting them is better experience in the real world. Contact us at info@qeinbox.com if you are looking for easy solutions or need assistance in setting up email automation campaigns.

About Qeinbox

Qeinbox is an army of prowess individuals who are dedicated to code and design email marketing templates and newsletters for your business. We are a team of experienced and creative designers who can help you get an edge in email marketing campaigns. We generate tested email templates and landing pages that convert! Whether you're an Email Service Provider (ESP), Agency, Small & Medium-Sized Business, or a Large Enterprise, our email marketing handymen are all skilled and sufficient to meet your needs. Our core services are,



Email Template Creation

We're competent to provide trendy and responsive email templates which are 100% hand-coded and pixel perfect.



Landing Page Design

Our designers possess the expertise to provide the fastest turnaround for fully customizable landing pages. The creative team can turn your imagination into reality!



Campaign Management

Not only designing, but Qeinbox is all ready to set up email marketing campaigns for your business too! Be it holiday email marketing, email automation, or transactional emails, we can handle it all.

Get in touch by sending an email at
info@qeinbox.com

or call us at
+1-209-753-4470

Email



Design to HTML

Idea to HTML

Landing Page



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