

How to Automate Your Marketing Like a Pro:

A guide to effective email and text marketing automation



Imagine if you could set up a simple marketing system to nurture leads for your business or nonprofit. Now imagine if you could set up this system and know it will continue to work while you focus on other essential business tasks.

Automation makes this possible.

Automation can include anything from email marketing and social media scheduling to customer segmentation and lead scoring. It makes the most of your marketing time by streamlining repetitive tasks and providing insights into customer behavior. This enables you to deliver personalized, timely, and relevant messages to your audience, optimize your campaigns based on data-driven insights, and maximize your marketing time while improving customer engagement and sales.

Best of all, once set up, it all happens on autopilot.

Marketing automation can be a game-changer for small businesses and non-profits. You could be a prime candidate for marketing automation if you:

- Have a sizeable customer base
- Host events or webinars
- Regularly launch new products or services
- Have a newsletter, customer loyalty, or email marketing program
- Keep track of customer birthdays or anniversaries
- Have multiple channels for customer engagement such as social media, website, chat, and email

What's inside:

03 Work smarter with marketing automation

04 Types of automation

05 Get started with email and text automation

16 The anatomy of an automation workflow

17 What makes an effective email/text automation series?

18 Automation planning worksheets

Work smarter with marketing automation

Automation allows you to work smarter by sending out a message, or series of messages, automatically. However, the benefits of marketing automation go beyond saving time.

With automation, you can deliver more personalized and targeted messaging to your audience at a time when their interest is peaked. Plus, with the ability to track and analyze your results, you can make data-driven decisions to optimize your marketing strategy for even better results. Whether you are a small business or nonprofit, there are many reasons to consider adopting marketing automation.

Increases brand awareness and builds lasting customer relationships

Each message sent to your subscribers builds a relationship between them and your business. Marketing automation sends timely and relevant campaigns, like seasonal discounts, product updates, satisfaction surveys, company news, and other helpful content, to support your audience throughout their journey. This keeps contacts engaged, helps to build long-term relationships, and turns contacts into loyal, repeat customers.

Offers seamless omnichannel experiences

Marketing automation improves the overall customer experience and increases engagement by allowing you to create a consistent brand experience across all channels — SMS text messaging, social media, email, and advertising. This allows you to quickly build multi-channel workflows to reach customers wherever they are.

Tailors emails to your audience

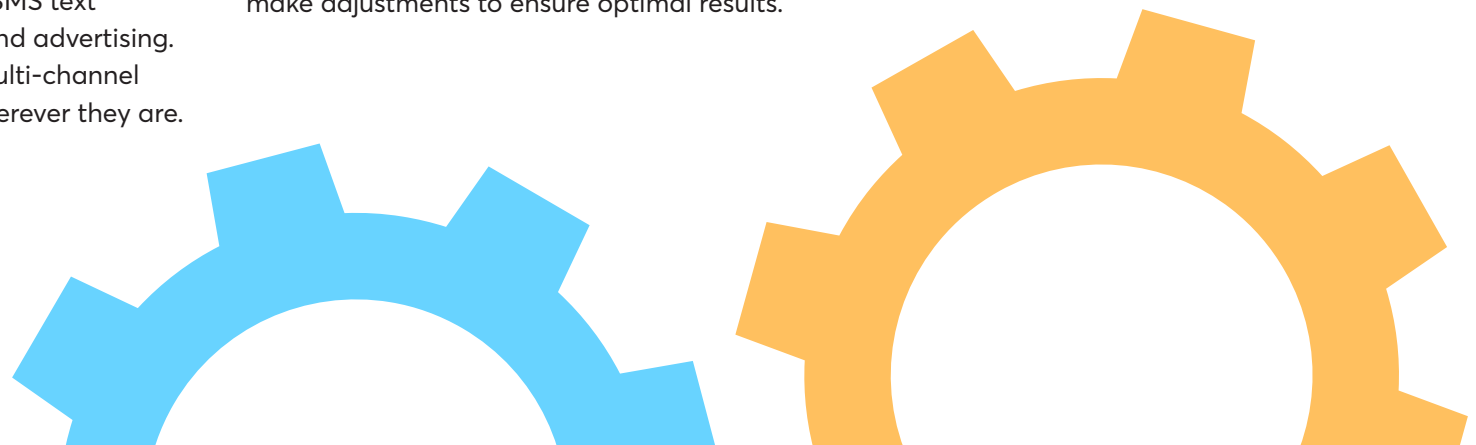
Marketing automation tools allow you to segment your audience list and send tailored messages to each group. Tailored messaging allows you to better nurture your audience and generate warmer leads.

Data-driven decision-making

The data derived from marketing automation is constantly updated. It allows you to collect and analyze data about your customers and their behaviors, so you will always have a good handle on what workflows resonate and which don't. This means you can make informed decisions about what types of content and messaging to send to different segments of your audience and make adjustments to ensure optimal results.

Scalable and efficient processes and workflows

As your business grows so does your customer base. Automation eliminates manual processes to achieve more with less time and resources. This enables you to quickly and efficiently scale your marketing efforts to manage and communicate with large audiences. You can also automate the entire customer journey, from lead generation to sales and beyond — allowing you to provide your audience with the same great experience whether they are your first or 10,000th subscriber.



Types of automation

Marketing automation refers to the use of software tools to streamline and automate repetitive marketing tasks. These tasks include everything from sending emails and texts to scheduling social media posts. There are many marketing automation types, each designed to help you with specific marketing tasks.



Email automation

One of the most common types of automation, [email marketing automation](#) sends targeted and personalized emails to subscribers based on their behavior, interests, and preferences. It automates email campaigns such as welcome emails, follow-up emails, and abandoned cart emails.



Text (SMS) automation

Sends automated [text messages](#) to subscribers or leads at specific times or when certain actions are taken (like making a purchase).



Lead generation automation

Automates the [lead generation](#) process of identifying and generating new customers. This can include using chatbots, landing pages, and forms to capture leads.



Social media marketing automation

Includes scheduling and publishing [social media](#) posts in advance, monitoring analytics, and engaging with your audience automatically through messenger chatbots.



Customer relationship management

Automates customer data, such as [monitoring customer interactions and relationships](#), sending targeted follow-up messages, and managing customer data.



Marketing analytics and reporting automation

These tools automate the collection and [analysis of customer data](#) so you can easily optimize your marketing campaigns and track return on investment.



Ecommerce marketing automation

Specifically tailored to [ecommerce](#) businesses, this involves automating tasks such as abandoned cart emails, product recommendations, and transactional (such as confirmation or feedback) emails.



Advertising automation

This automates your advertising campaigns, such as retargeting ads and Google Adword campaigns.

Get started with email and text automation

While there are many types of automation available, email and text automation series are the easiest ones to get up and running. There are several marketing automation series you can use to reach your audience in a more personalized, meaningful way. These are a sequence of pre-written texts or emails sent based on a particular purpose, so it is important to have a clear goal when deciding which messages to implement and how many emails or text messages to include in the series.

Welcome Series

Add a sign-up form to your website and entice your website visitors to sign up with an offer. Then, you can welcome new subscribers with a series of emails to help introduce them to your business or nonprofit.

Goal: Engage new subscribers and have them claim their free class

Audience: New subscribers who sign up for a free class

Frequency/Trigger:

Email 1: At sign up

Email 2: Two days after email 1

What does the audience need to know:

Email 1: Welcome email - set expectations and redeem free class

Email 2: Invitation to connect on other channels

CTA:

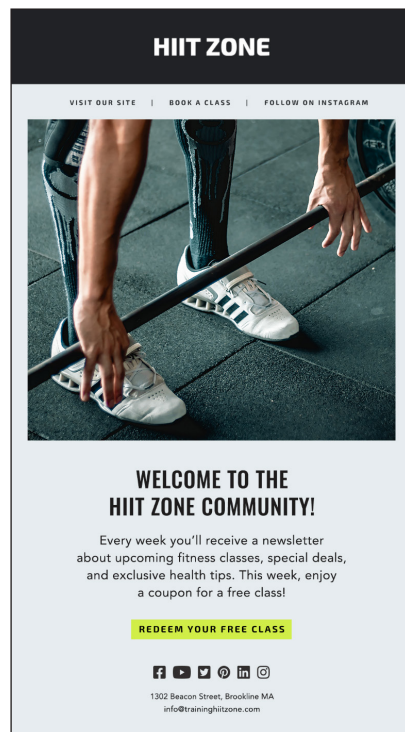
Email 1: Redeem free class

Email 2: Follow on Instagram / Like on Facebook

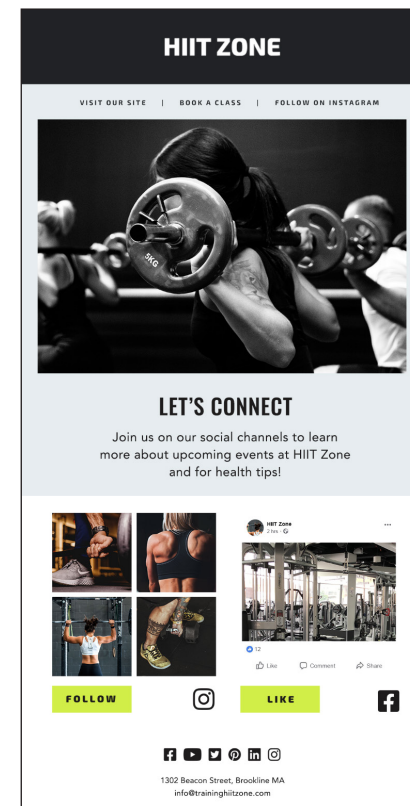
Data to Monitor:

Email 1: Click through rate (CTR), Class redemption rate

Email 2: CTR, Instagram/Facebook growth



Email 1



Email 2

Trigger

Automation
End

Relationship Building

Make your customers feel special with automated emails that send every year for important milestones like birthdays and anniversaries. You can include promotions and information that gets them to engage with you.

Note: Don't forget to add birthday and anniversary dates to your contacts.

Goal: Build customer loyalty

Audience: Loyal customers

Frequency/Trigger:

The subscriber's birthday or anniversary

What does the audience need to know:

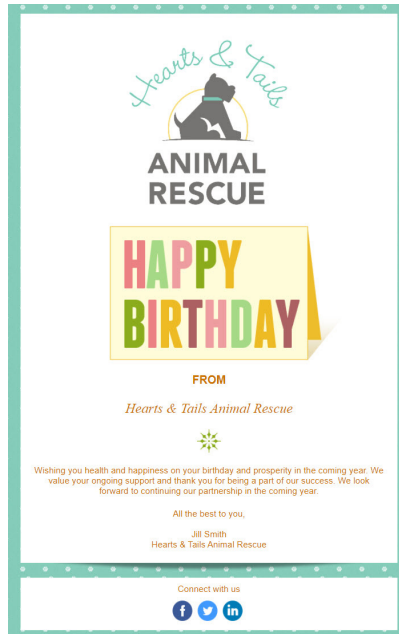
Email 1: Birthday or anniversary offer

CTA:

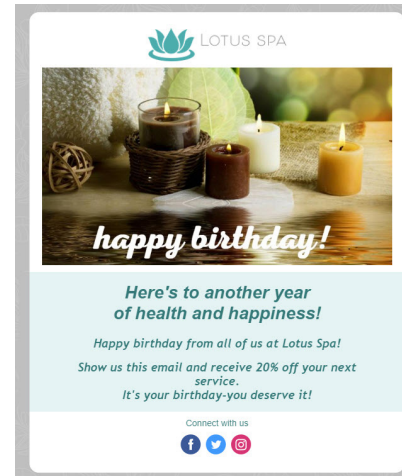
Email 1: Redeem birthday/anniversary offer

Data to Monitor:

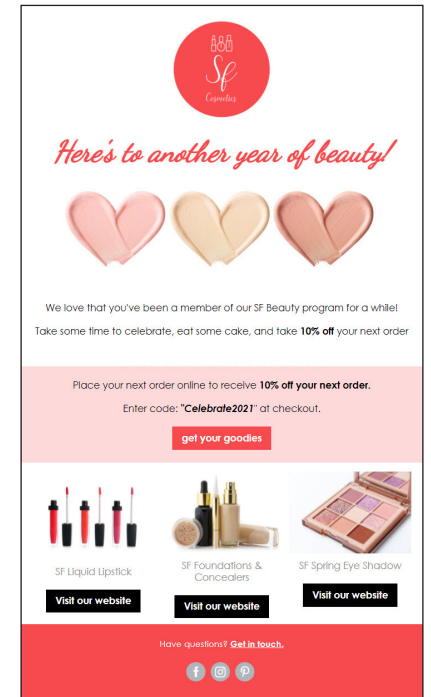
Email 1: CTR, offer redemption rate



Birthday Email



Birthday Email



Anniversary Email

Email 1

Trigger

Automation
End

Action Series

Use this series to create excitement for something happening at your organization such as an event, meetup, or a clearance sale. Start with an interested audience and then trigger this type of series to send.

Note: The action series differs from a typical automation series because it's driven by a set deadline. It contains multiple touches before an event or deadline and is triggered by your actions rather than your customer's actions.

Goal: Get subscribers to sign up for cycling club

Audience: Existing customers who have purchased a bike in the past

Frequency/Trigger:

Email 1: Month before meet up

Email 2: 2 weeks before meet up

Email 3: 1 Week before meet up

What does the audience need to know:

Email 1: Benefits of joining cycling club

Email 2: Introduce cycling club leaders and their credentials

Email 3: Cycling club invite

CTA:

Email 1: Sign up for cycling club

Email 2: Join next meet up

Email 3: Join the cycling club

Data to Monitor:

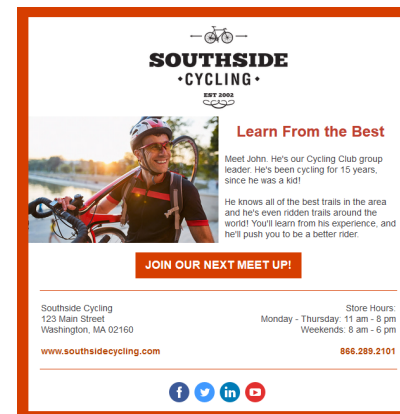
Email 1: CTR, cycling club signups

Email 2: CTR, cycling club signups

Email 3: CTR, cycling club signups



Email 1



Email 2



Email 3

Trigger

Automation
End

Anticipation Series

This series starts with an already interested audience and encourages them to take action. This is great for spreading the word or getting subscribers informed and hyped up for an upcoming event or product launch.

Goal: Provide 5K registrants with information about the event and provide reminders

Audience: 5K registrants

Frequency/Trigger:

Email 1: Upon registration

Email 2: 2 weeks after first email

Email 3: 1 Month before the event

What does the audience need to know:

Email 1: Important event information

Email 2: Information on how to train for the 5K and reminder information about the 5K

Email 3: How to find the perfect running shoe

CTA:

Email 1: Help spread the word about the 5K

Email 2: Read helpful blog posts

Email 3: Find the right running shoe

Data to Monitor:

Email 1: CTR

Email 2: CTR, website visits on blog pages

Email 3: CTR, website visits on blog page



Email 1



Email 2



Email 3

Trigger

Automation
End

Onboarding Series

Use this after you get someone to take action from the previous series. Follow up after a purchase and make sure customers see success.

Goal: Get website design customers onboarded

Audience: Website design services customers

Frequency/Trigger:

Email 1: 1 hour after the website goes live

Email 2: 2 days after the first email

Email 3: 1 week after project completion

What does the audience need to know:

Email 1: Next Steps after the website goes live

Email 2: How to use their website dashboard

Email 3: We are about their experience

CTA:

Email 1: Log into your dashboard

Email 2: Log into your dashboard

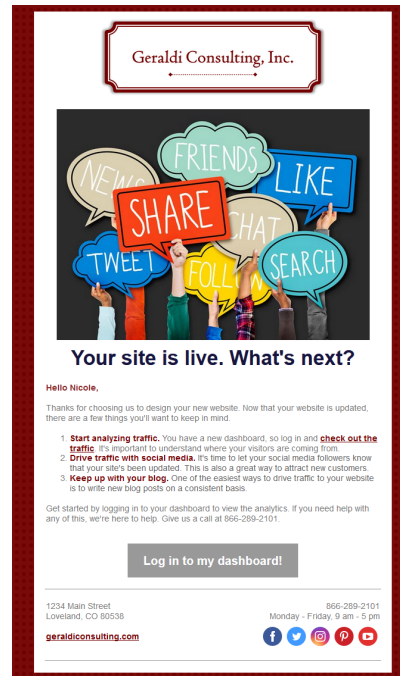
Email 3: Leave a review

Data to Monitor:

Email 1: CTR, dashboard logins

Email 2: CTR, dashboard logins

Email 3: CTR, reviews



Email 1



Email 2



Email 3

Trigger

Automation
End

Lead Nurture Series

Use this type of series to turn prospects into clients or customers. Lead nurturing can generate up to 50% more sales-ready leads at a 33% lower cost.

Goal: To get prospects to sign up for a service.

Audience: Prospects

Frequency/Trigger:

Email 1: 1 day after contact us form fill

Email 2: 1 week after the first email

Email 3: 1 week after the second email

What does the audience need to know:

Email 1: Learn about our business

Email 2: The services we offer

Email 3: What our clients are saying

CTA:

Email 1: View our project portfolio

Email 2: Learn how we can work together

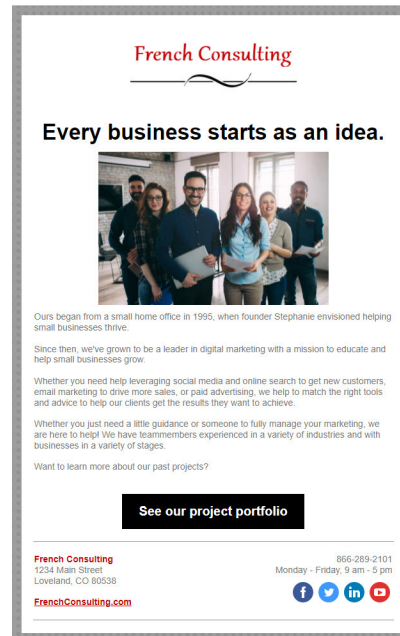
Email 3: See what our customers are saying

Data to Monitor:

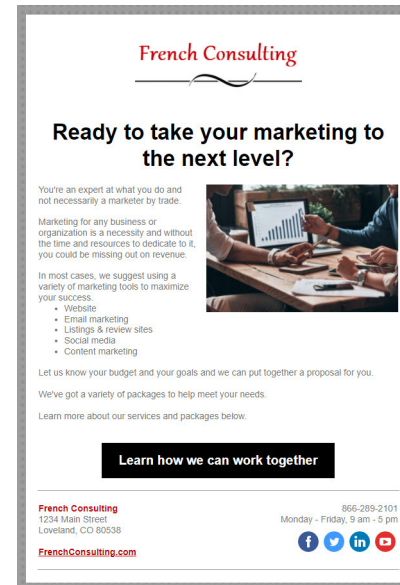
Email 1: CTR, website visits on about us page, services signups

Email 2: CTR, website visits on services page, services signups

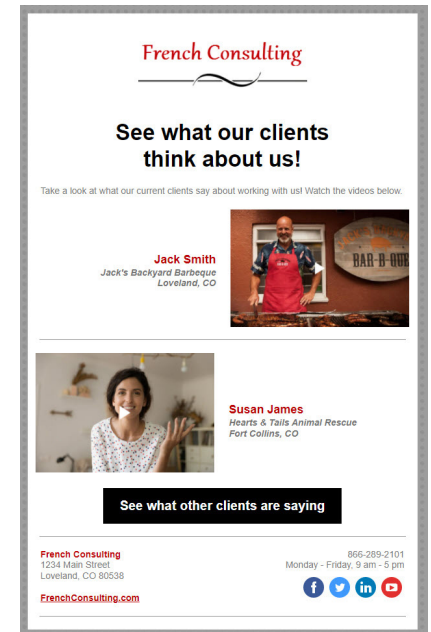
Email 3: CTR, website visits on the testimonials page, services signups



Email 1



Email 2



Email 3

Trigger

Automation
End

Follow-up Series

Use this series to follow up with people after an event or other action. Depending on the type of action, it could contain recordings (like a webinar recording), resources, or even continuing education to further educate people.

Goal: To help anyone who has adopted a dog have a positive transition into their home.

Audience: Dog adopters

Frequency/Trigger:

Email 1: 1 day after adoption is final

Email 2: 3 days after first email

Email 3: 1 week after second email

What does the audience need to know:

Email 1: Thank you for adopting, leave a review

Email 2: How to help your pet transition to your home successfully

Email 3: Sign up for dog grooming services and ask for donations to help other pets in need

CTA:

Email 1: Leave a review

Email 2: Download the pet transition guide

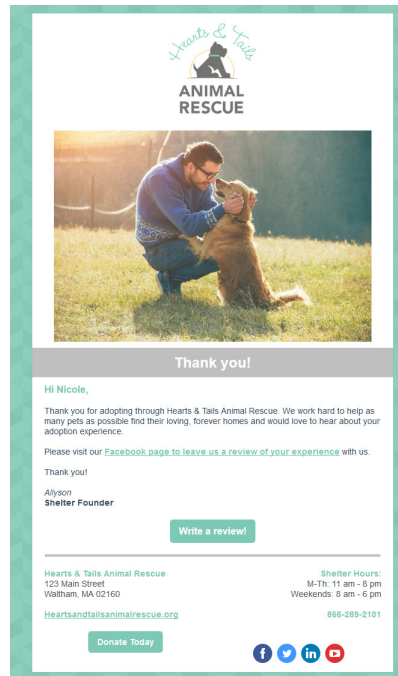
Email 3: Call for a dog grooming appointment

Data to Monitor:

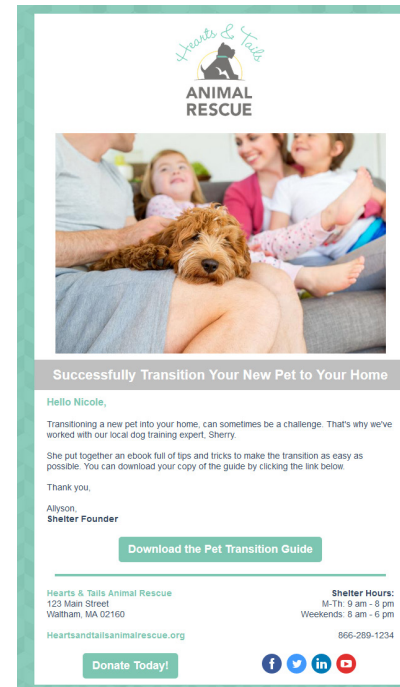
Email 1: CTR, reviews

Email 2: CTR, pet transition guide downloads

Email 3: CTR, scheduled grooming appointments



Email 1



Email 2



Email 3

Trigger

Automation
End

Topical/Subject Matter Series

This type of series is great for repurposing any timeless content and will help you build stronger relationships. You can use any previously sent emails or blog posts and put them into a series of emails. We've suggested the timeline, but adjust this to fit your needs.

Goal: Build customer relationships
Audience: Customers and prospects

Frequency/Trigger:

Bi-weekly

What does the audience need to know:

Email 1: How to practice box breathing

Email 2: How to read the nutrition label

Email 3: I tried 7 days of online yoga and here are my five takeaways

CTA:

Email 1: Read the blog/Find my next yoga class

Email 2: Read the blog/Find my next yoga class

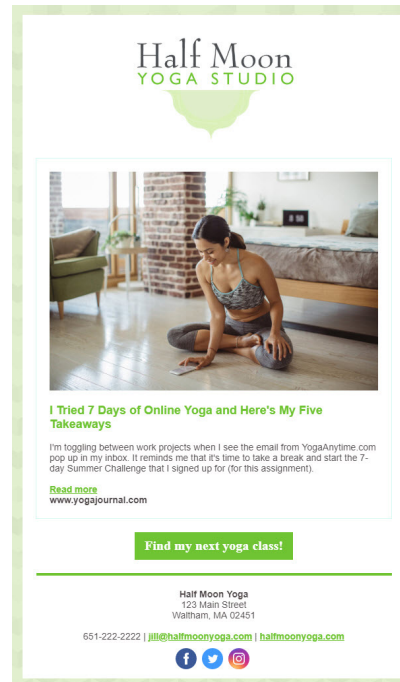
Email 3: Read the blog/Find my next yoga class

Data to Monitor:

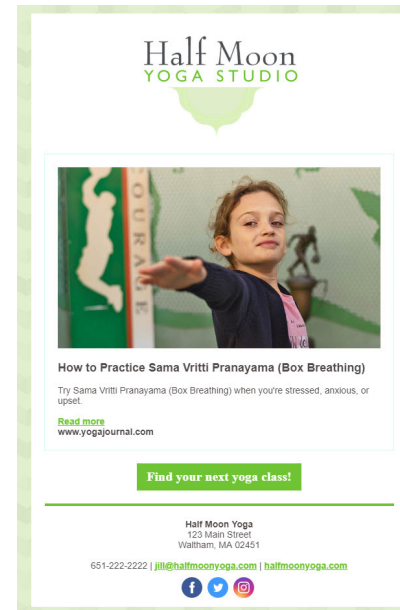
Email 1: CTR, website visits on blog page, yoga class signups

Email 2: CTR, website visits on blog page, yoga class signups

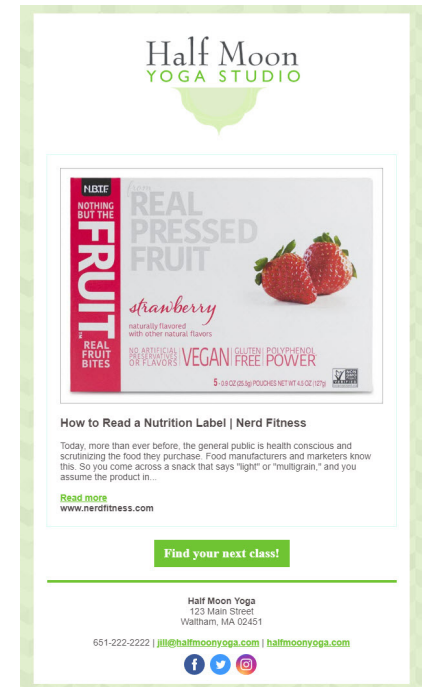
Email 3: CTR, website visits on blog page, yoga class signups



Email 1



Email 2



Email 3

Trigger

Automation
End

Re-engagement

This type of automation is designed to get inactive subscribers back into an active state which can help keep your mailing list healthy and restore your engagement rates.

Goal: Re-engage inactive list subscribers

Audience: Inactive subscribers

.....

Frequency/Trigger:

Email 1: When a subscriber has been inactive for more than 3 months

What does the audience need to know:

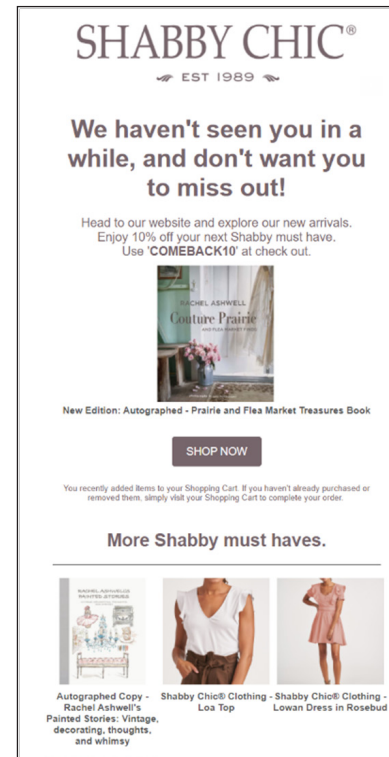
Email 1: Re-engagement email with discount offer

CTA:

Email 1: Shop now

Data to Monitor:

Email 1: CTR, website visits, discount code usage



Email 1

Trigger

Automation
End

Survey/Feedback

Allow your customers to feel heard with survey/feedback emails. These are typically sent out based on a trigger or action such as a purchase or product update. This helps to increase overall customer satisfaction and gives you a pulse on overall customer sentiment.

Goal: Get customers to leave a review

Audience: Customers

Frequency/Trigger:

Email/Text 1: Upon purchase/service completion

What does the audience need to know:

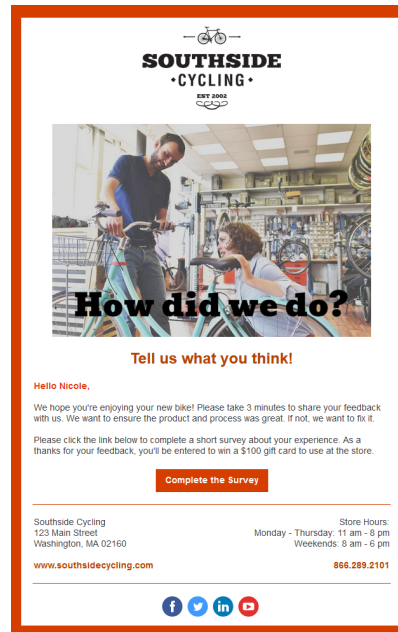
Email/Text 1: Tell us what you think!

CTA:

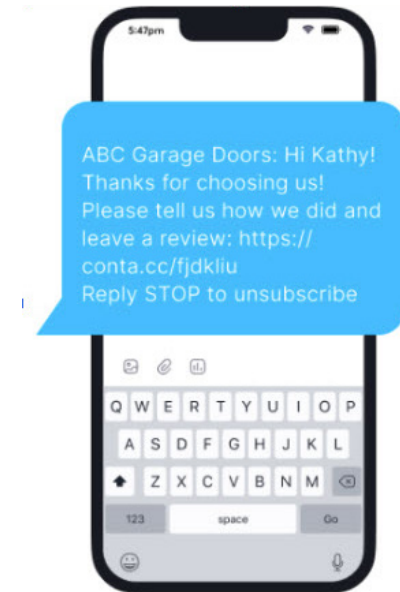
Email/Text 1: Leave us a review

Data to Monitor:

Email/Text 1: CTR, review completion



Feedback Email



Feedback Text Message

Email/TextMessage 1

Trigger

Automation
End

Abandoned Cart

One of the most common types of retargeting emails, abandoned cart emails remind prospective buyers about products they left in their online shopping carts, draw them back to your site, and encourage them to complete the purchase they were about to make.

Goal: Get users who abandoned their shopping cart to make a purchase

Audience: Customers and prospects who abandoned their shopping carts

Frequency/Trigger:

Email/Text 1: Upon cart abandonment

What does the audience need to know:

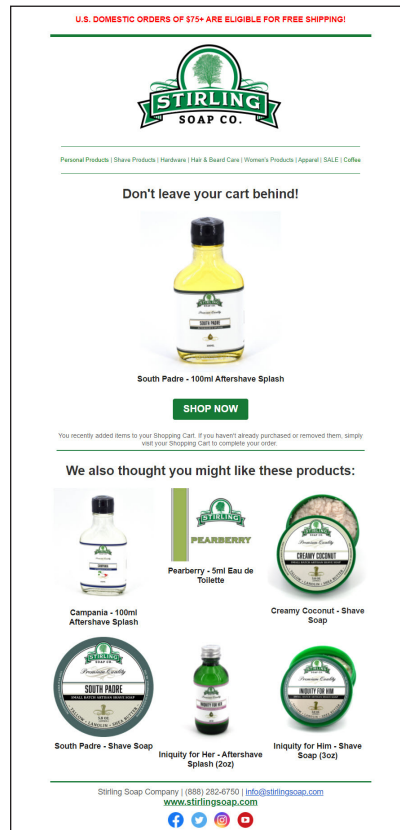
Email 1: We saved your cart!

CTA:

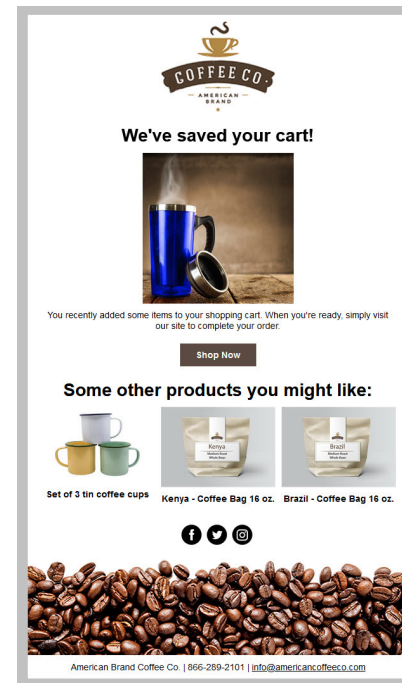
Email 1: Shop now

Data to Monitor:

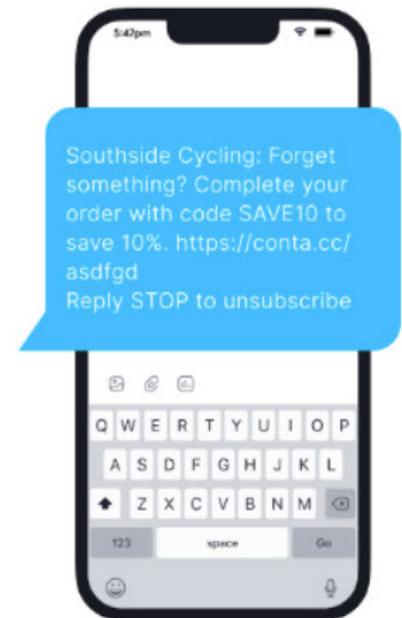
Email 1: CTR, purchases



Abandoned Cart Email



Abandoned Cart Email



Abandoned Cart Text Message

Email/TextMessage 1

Trigger

Automation
End

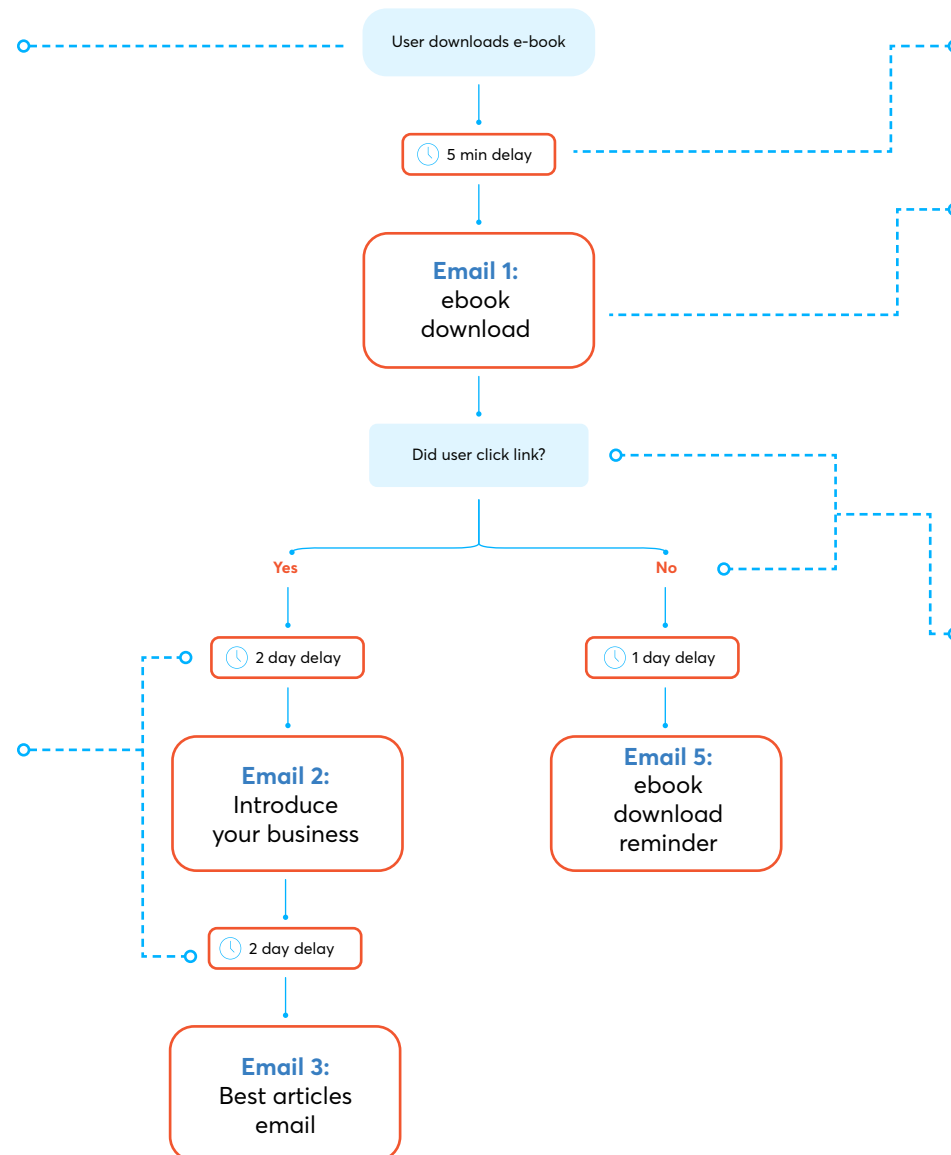
The anatomy of an automation workflow

A automation workflow is a series of steps designed to automate a specific process. Before you begin building your text or email automated workflow, there are several key components you must know and specify:

Trigger: The behavior or action that signals the start of a workflow. Sample triggers can include if a contact:

- Completes subscription or form
- Is added to a segment or list
- Has a birthday/anniversary
- Clicks on a specified email link
- Abandons their online cart
- Responds to a survey
- Donates or makes a purchase
- Has a fulfilled order
- Visits your website

Frequency: How much time between each message in the workflow. This can help you provide consistent communication with your audience without sending too many messages or offers. As with delays, your frequency can range from minutes all the way up to months.



Delay: Time between the trigger and the message send. This can be any time period from minutes all the way up to months.

Message: The content sent to subscribers, like emails or text messages. These should be personalized and relevant based on your contact's interactions with your brand. Ask yourself:

- How many messages will I send to my audience?
- How will my audience receive these messages: email, SMS, etc?
- What is the goal of this message?

Conditional splits: A branch in your automation based on a contact's actions and information. These conditions can segment users based on specific criteria or how they interact with your messages. For example, if a user doesn't open an email, you can send them down a path that resends that email with a different subject line. Splits can be based on:

- Contact details
- Contact activity
- Shopping activity
- Geographic location
- Interests

What makes an effective email/text automation series?

An effective marketing automation series is one that engages and nurtures your audience throughout their customer journey. To be effective, your automation must:



Understand your audience needs



Utilize data to inform strategy



Be timely



Contain useful content



Have a clear call to action

1. Understand your audience needs

An effective automated email series ultimately comes down to understanding your audience. Understanding the needs and preferences of your audience is essential when creating personalized content that resonates with them. To do this, ask yourself the following questions:

- Who is your audience?
- What do they want to know
- What do they need to know
- What are their needs, problems, and challenges?

Answering the questions above will help you decide the information, the number of emails you'll need to include, and the frequency with which you'll send those emails in your automated email series to the individuals in the group of contacts you're speaking with.

2. Utilize the data to inform strategy

Your automation should be informed by data. Use the data from your automation series and website analytics to determine what messages resonate with your audience, what topics are driving engagement, and what times and days are most effective for sending your messages. This information can help you personalize your campaign and content as well as optimize timing for increased engagement.

3. Be timely

In automation, timing is everything. To capture your audience's attention and drive sales, you need to send messages at the right time. Adding triggers based on actions your audience takes on your website, such as abandoning a cart or signing up for a newsletter, can help you send timely messages that are more likely to increase sales.

4. Contain useful content

Your automation series should be relevant and provide value to your audience to increase its impact. Whether it's educational content, exclusive offers, or personalized recommendations, your messages should be helpful and relevant to your audience's needs and wants.

Helpful content often contains:

- Useful tips
- Creative ideas
- Strategies to help the reader solve a problem
- Answers to common questions

5. Have a clear call to action

Every message in your automation series should have a clear call to action (CTA). Whether it's to download an ebook, register for a webinar, or make a purchase, your CTA should be specific and actionable.

Automation planning worksheet

As you are planning your next email or text message automation, there are several questions you should ask yourself. Use these worksheets to organize and create your automated email series.

1. What is your audience?

Prospects? Customers? Event Registrants?

2. What does the contact need to know at this stage in the relationship?

Make a list of what they want, what they need to know, their needs, problems and challenges.

3. What content can help address the needs you outlined in Question 2.

4. What is the frequency for these messages?



In the beginning you'll want your messages to be a bit more frequent than your regularly scheduled email newsletter. Depending on the message, you can schedule emails to deliver within hours, days, or weeks. When in doubt, once a week is a good rule of thumb.

5. What is the action you want your audience to take?

Should be focused on guiding your audience to take action toward your goal.

6. What data do you want to monitor?

What email, website, or other actions do you want to monitor for this campaign (CTR, engagement, etc.)?

Audience:				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring

Note: When creating your automated series, be aware of any time-specific content included. If it's a series you plan on continually using, it's best to stick with timeless content that will be the same today or a year from today. Be sure to periodically review your messages and make any updates.

Example: Yoga Studio

The yoga studio uses a three-email series to communicate with multiple groups of contacts:

1. New Students

The first email in this series welcomes new students and provides logistical information such as hours, locations, and who to contact with questions. The second includes information about special programs offered. The final email includes a class schedule and instructor backgrounds.

2. Loyal Customers

This series includes emails with tips, recipes, and additional information about applying class learnings to deal with everyday stress.

3. Prospects

This series includes information regarding the benefits of yoga, testimonials from students at varying levels, and a special discount coupon for new students.

Audience: New Students				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Immediately upon signup	<ul style="list-style-type: none">• Welcome message• Hours/locations• Contact information	Sign up for a class	<ul style="list-style-type: none">• Link clicks• Website visits• Free class signups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 8	<ul style="list-style-type: none">• Special program for newcomers• Deal — 10% off	Sign up for specials	<ul style="list-style-type: none">• Link clicks• Website visits• Discount usage
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 14	<ul style="list-style-type: none">• Full class schedule• Class details• Instructors' backgrounds	Sign up for a series of classes	<ul style="list-style-type: none">• Link clicks• Website visits• class signups

Audience: Loyal Customers				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Day 20	Learn how to master individual poses	Sign up for a class	<ul style="list-style-type: none">• Link clicks• Website visits• Class signups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 30	Recipes to complement your workout	Sign up to meet with the in-house nutritionist	<ul style="list-style-type: none">• Link clicks• Website visits• Nutritionist signups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 40	Exercises to reduce stress	Sign up for this unique program	<ul style="list-style-type: none">• Link clicks• Website visits• Program signups

Audience: Prospects				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Day 4	The benefits of Yoga	Drop in for a free class	<ul style="list-style-type: none">• Link clicks• Website visits• Free class signups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 10	A beginner's story	Sign up for our specials	<ul style="list-style-type: none">• Link clicks• Website visits• Specials signups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 17	Become a new student — 10% off	Sign up for the discount	<ul style="list-style-type: none">• Link clicks• Website visits• Discount signups

Example: The Nonprofit

Here's how the nonprofit uses automation to communicate with multiple audiences:

1. Volunteers

Volunteers receive a series of emails that introduce members of the nonprofit's volunteer community and share their favorite volunteer projects, as well as information on the impact volunteers have on the success of the cause.

2. Donors

Donors receive emails detailing the history of the organization, its members, board, and its impact on the community. They also receive opportunities to contribute.

3. Event-specific

Once people have registered for the organization's event, registrants receive short messages that build excitement and provide timely information about the event.

Audience: Volunteers				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Day 3	Welcome to the community	Learn more about event opportunities	<ul style="list-style-type: none">Link clicksWebsite visits
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 10	Recent volunteer projects	Check out our volunteer projects	<ul style="list-style-type: none">Link clicksWebsite visits
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 20	Impact of our volunteers	Read their stories	<ul style="list-style-type: none">Link clicksWebsite visits

Audience: Donors				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Day 2	The history of our cause	Download the overview	<ul style="list-style-type: none">Link clicksWebsite visitsOverview downloads
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 8	Meet the board members	Check out the impact of donors	<ul style="list-style-type: none">Link clicksWebsite visitsDonations
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 15	Donating opportunities	Choose your cause	<ul style="list-style-type: none">Link clicksWebsite visitsDonations

Audience: Event-specific				
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
1	Day 1	The agenda is growing	Sign up for the session	<ul style="list-style-type: none">Link clicksWebsite visitsSignups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
2	Day 4	Speaker and sponsor list	Read the speaker bios	<ul style="list-style-type: none">Link clicksWebsite visitsSignups
Automated Email #	Frequency (Send Day/Time)	Content	Call to Action (CTA)	Data Monitoring
3	Day 7	How to prepare for an event	Download the checklist	<ul style="list-style-type: none">Link clicksWebsite visitsDownloadsSignups

Let us help you get started with automation.

Marketing automation can be a game-changer for small business marketers. Automating tasks like email and text campaigns, lead generation, and social media posts allows you to free up valuable time and resources that can be used to focus on building relationships with your customers, developing your brand, and growing your business.

With the right tools in place, you can create targeted and personalized messages for your customers, track their behavior, identify new opportunities for growth and improve your overall customer experience. Constant Contact has the tools you need to create automation workflows that will provide your audience with valuable content at the right time.

Get a [free trial of Constant Contact](#) and see how marketing automation can transform your business.

Try it yourself

