

Creating your first automations

Mastering the art of marketing automation can be a game-changer for your business's growth. By utilizing automation, you can streamline your marketing efforts, save time, and connect with your audience in a more personalized, meaningful way. Use these worksheets to guide you through the process of planning the three most common, must-have automations.

Want to learn more about
marketing automation?
Download the full guide!



Automation Example 1: **Planning your welcome series**

Welcome new subscribers with a series of emails to introduce them to your business or nonprofit and encourage sales or donations.

EMAIL ONE: Delivery/welcome

Trigger (ex. Joins a list):

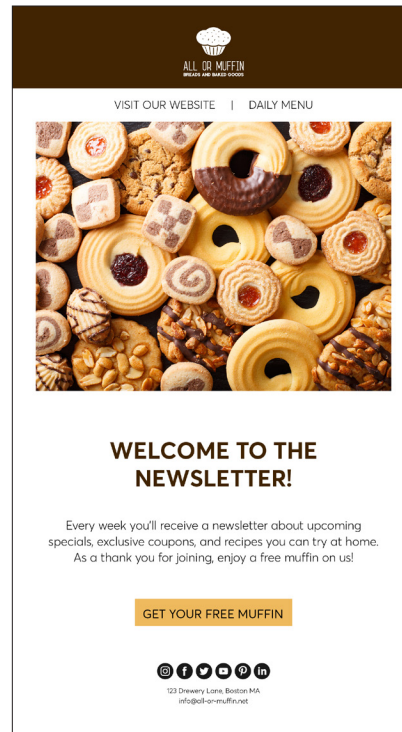
What did you promise?

How do they get it?

CTA:

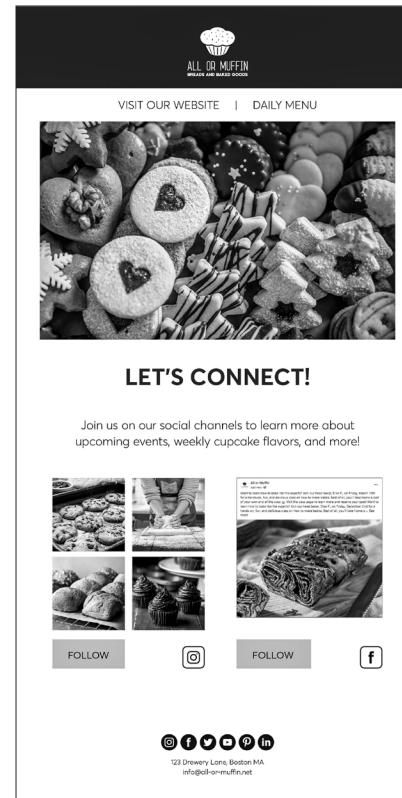
Data to Monitor:

- Clicks
- Coupon Usage
- Meetings booked



Welcome Email

Email 1



Invitation to connect

Email 2



Things to know

Email 3

Trigger

Automation End

Automation Example 1: **Planning your welcome series**

Welcome new subscribers with a series of emails to introduce them to your business or nonprofit and encourage sales or donations.

EMAIL TWO: Invitation to connect

Frequency (ex. 3 days later):

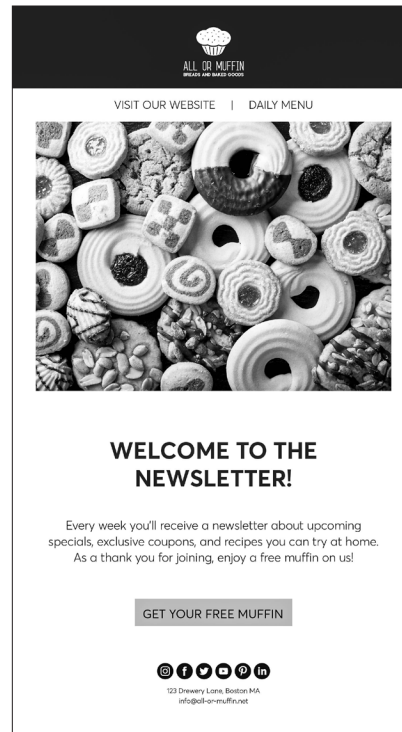
Where and why should they follow you?

How can they contact you?

CTA:

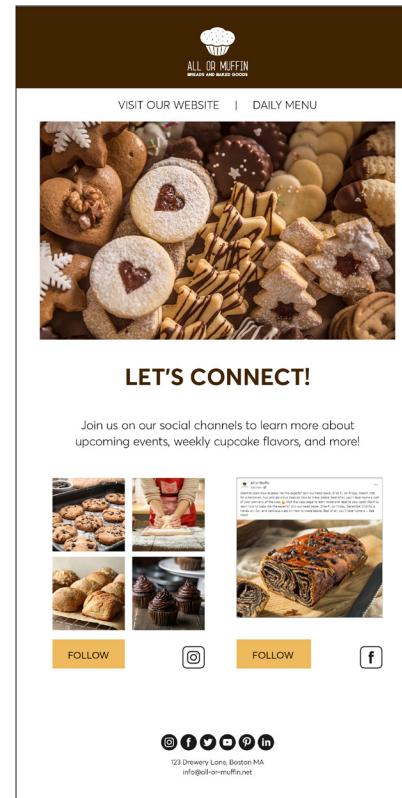
Data to Monitor:

Opens Clicks Responses



Welcome Email

Email 1



Invitation to connect

Email 2



Things to know

Email 3

Trigger

Automation End

Automation Example 1: **Planning your welcome series**

Welcome new subscribers with a series of emails to introduce them to your business or nonprofit and encourage sales or donations.

EMAIL THREE: Things to know

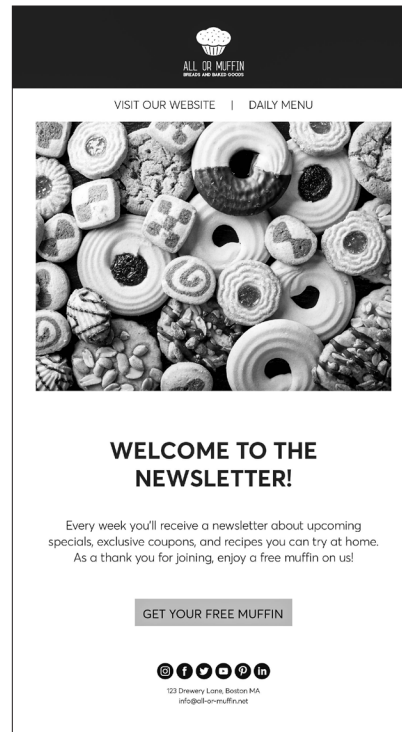
Frequency (ex.3 days after email 2):

What does the audience need to know?

CTA: Link for more info

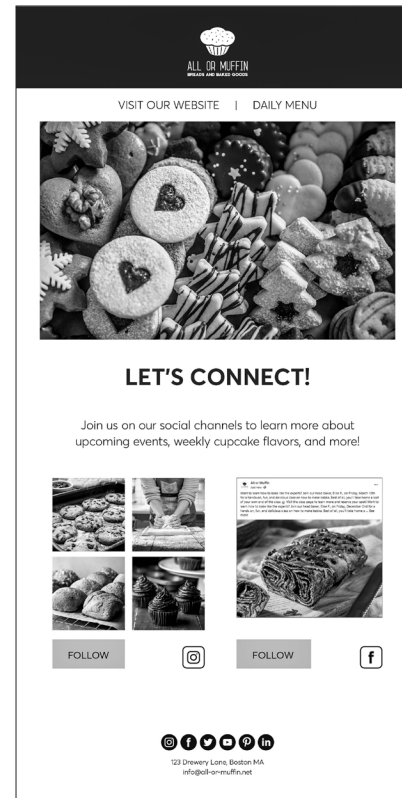
Data to Monitor:

Opens Clicks Responses



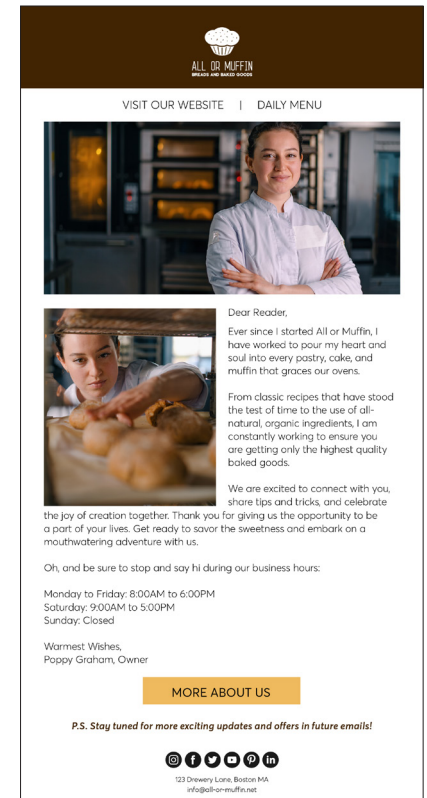
Welcome Email

Email 1



Invitation to connect

Email 2



Things to know

Email 3

Trigger

Automation End



Automation Example 2: Planning your birthday/anniversary automation



Make your customers feel special with automated emails that send every year for important milestones like birthdays and anniversaries.
Pro Tip: Include promotions and information that gets them to engage with you.

EMAIL ONE:

Birthday/Anniversary email

Trigger: Subscriber's birthday/anniversary

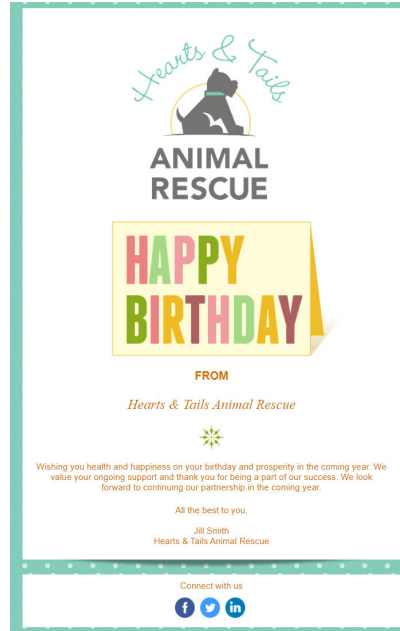
Are you offering them something?

How do they get it?

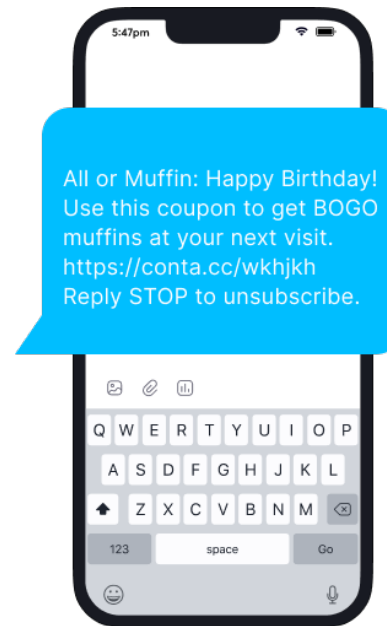
CTA:

Data to Monitor:

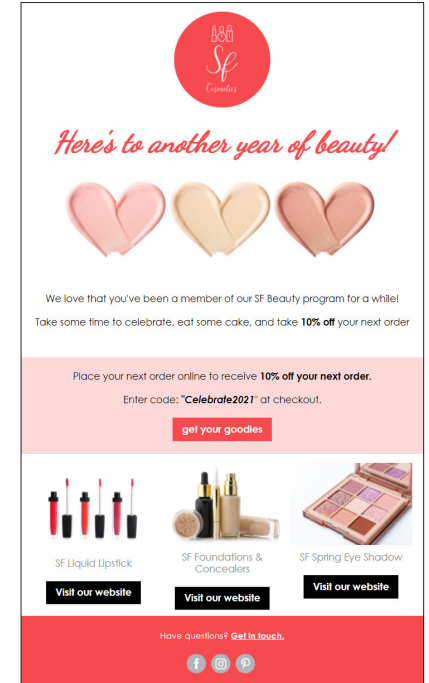
- Clicks
- Opens
- Coupon Usage
- Completed sales



Birthday Email



Birthday Text Message



Anniversary Email

Email/Text Message

Trigger

Automation End



Planning your abandoned cart automation

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.

EMAIL ONE: Abandoned Cart

Trigger: Upon cart abandonment

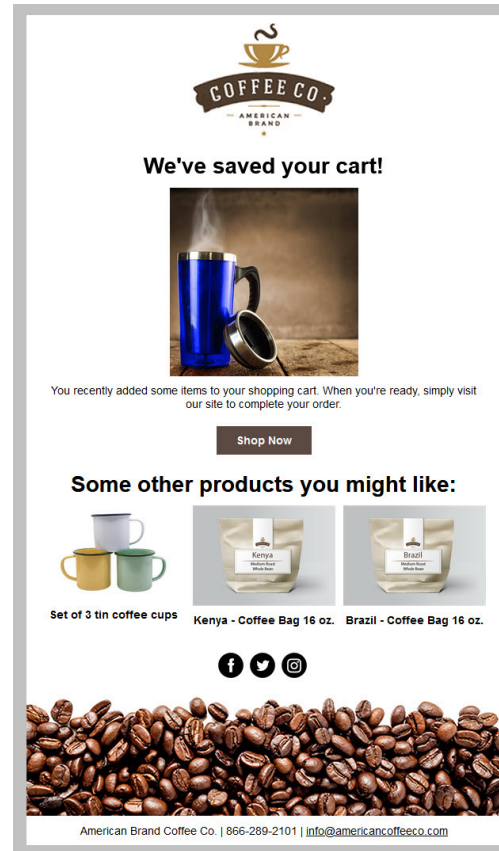
What did you promise?

How do they get it?

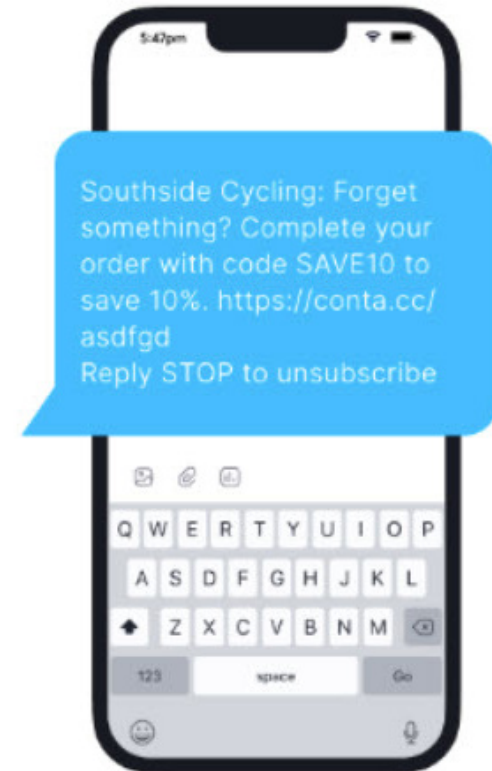
CTA:

Data to Monitor:

- Clicks
- Opens
- Coupon Usage
- Completed sales



Abandoned Cart Email



Abandoned Cart Text Message

Email/Text Message

Trigger

Automation End



Get started with marketing automation

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. Get back to your business while your marketing is on autopilot. Constant Contact has the tools you need to create automation workflows that will provide your audience with valuable content at the right time.

See how marketing automation with Constant Contact can transform your business.

[ConstantContact.com/achieve-more](https://www.constantcontact.com/achieve-more)