

Email Marketing Automation Guide

How to Put Your Marketing on **Autopilot** with **Email Automation**



Imagine if you could set up a simple marketing system that allowed you to capture and nurture leads for your business or nonprofit.

Now imagine if you could set up this system once and know that it's continually working for your business or nonprofit while you focus your energies on other aspects that are important for your continued growth.

Automation makes it possible.

With email automation, you can increase engagement with your contacts by delivering personalized, timely, and relevant messages.

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

Marketing your business or nonprofit to new and existing contacts just got a lot easier.

Here's what we'll look at in this guide:

Understanding automation

pg 3

A smart approach for your automated email series

pg 4

Automation ideas to get you started

pg 6

Part 1: Understanding Automation

What is Automation?

With email marketing automation, you can create a series of personalized, automated emails, also known as autoresponders, that are sent to a contact, in the order and frequency you decide, after they are added to a list—by you or through a sign-up form.

Why use marketing automation?

Automation allows you to create the same great experience for your first email subscriber and your 10,000th subscriber. This makes an automated email series such as a welcome email series the perfect tool for getting your core messages in front of individuals within specific groups of contacts. You choose the content, the order, and the frequency of the messages your contacts receive.

A “welcome email series” is a series of automated emails sent out when a person first subscribes to your list and is meant to introduce them to your business while making a great first impression. But that’s not the only kind of automated email series. For example, you can create an automated email series designed to turn prospects into customers, customers into repeat buyers, and to address frequently asked questions from other groups of contacts such as donors and volunteers.

Best of all, once set up, an automated email series works on autopilot so you can focus on other areas of your business.

“Why would I want to send automated messages? Isn’t that impersonal?”

Automation actually allows you to be more personal. This is because you’ll be crafting messages that speak to the individual contacts within specific groups of your email contacts. Each and every contact will go through the same great experience you create for them whether they sign-up to your email list today or next month. This means each contact gets the right message at the right time.

You’ll be able to focus on the information you need to share with each group rather than the more general messages that you have to create to speak to all of your email contacts at once.

In fact, a great automated email series won’t feel impersonal at all. Instead, it feels personal, relevant, and timely to the reader.

Automation allows you to do more.

Overall, automation allows you to solve problems for your audience and allows them get to know, like, and trust you while you paint a picture of what life will look like with your help.

You can also address and overcome objections, outline the features and benefits of your product or solution, and ultimately create intense desire for what you have to offer.

**Sound good?
Then let’s get started.**

Part 2: A Smart Approach for Your Automated Email Series

Once you've attracted the attention of a prospect or customer, i.e. they've visited your website or store, attended an event, or expressed interest in your cause, an automated email series allows you to capture that attention so you're able to continue the conversation right from the moment they sign up or are added to your email list.

This conversation allows the contact to get to know, like, and trust you. In the end, this process allows you to make an offer of your products and services or make an 'ask' that furthers the cause for your nonprofit. You'll likely see more people take action on these emails because they'll be more invested because of the relationship that's developed.

So, what kind of content do you need for your automated email series?

Above all else, you'll want the content in your automated email series to be useful. Your reader should look forward to receiving every email in your series. This happens when they know they'll be rewarded for taking a moment out of their day to read your message. Think in terms of useful tips, creative ideas, or strategies that help the reader solve a problem.

The exact content you'll use depends on the needs of the individual contacts within the group you're emailing.

Examples:

- **For prospects**, you may focus on content that shows them how working with you or using your product will make their life better;
- **For customers**, you may focus on how they

can get the most from your product or service; perhaps you want to show potential volunteers how fulfilling it is to work with your nonprofit, or how contributions from donors make a real difference in the community you serve.

The good news is you can create multiple series for the people in whatever group of contacts you're trying to reach.

What content is most effective for an automated email series?

A simple approach involves taking a traditional list and delivering it one tip at a time through your automated email series.

Examples:

- 7 Little Known Secrets Every Consultant Should Know About Social Media

- 7 Ways to Decorate Your Home (Without Breaking the Bank)
- 5 Ways to Help Your Community Without Spending a Dime.

The key to an effective automated email series comes down to understanding your audience:

- **What do they want to know?**
- **What do they need to know?**
- **What are their needs, problems, and challenges?**

Use the questions above to 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.

Automation Planning Worksheet

Use this worksheet to help you organize and create your automated email series.

- 1 Who is the audience?** (Prospects? Customers? Event registrants? Etc.)
- 2 What does the contact need to know at this stage in the relationship?** (Make a list of what they want to know, what they need to know, and their needs, problems, and challenges.)
- 3 Create an automated email that offers helpful content addressing each list item you created.** (Keep these emails to the point and focused on one topic.)
- 4 Decide on a frequency for your 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 Include an offer or call to action. What is the action you ultimately want the contact to take?** (Buy something? Contact you?) Don't forget to make an offer at some point in your email series. Save the offer or call to action until you've sent at least two messages with helpful content.

1 Audience: _____

Automated Email	Day/Time	Content	Call to action

2

3

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5

A note about the maintenance of your automated email series

When creating your automated email series, you'll want to be aware of any time-specific content you include. If it's an automated email 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 review your messages and make any necessary updates.



Part 3: Automation Ideas to Get You Started

Remember, automation allows you to create a series of personalized, automated emails that are sent to a contact after they are added to a list — by you or through a sign-up form. Here are some automation ideas to give you some inspiration.

(Example) The 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 automated series welcomes new students to the studio and provides logistical information such as hours, locations, and who to contact with questions. Another email includes information about special programs offered to new students. A third email includes a full class schedule along with details about the classes and the instructors.

(Example) Worksheet

Audience: New students

Automated Email	Day/Time	Content	Call to action
#1	Immediate	<ul style="list-style-type: none"> • Welcome Message • Hours/Locations • Contact Information 	<ul style="list-style-type: none"> • Sign Up for a Class
Automated Email	Day/Time	Content	Call to action
#2	8	<ul style="list-style-type: none"> • Special Programs for Newcomers • Deal: 10% Off 	<ul style="list-style-type: none"> • Sign Up for a Discounted Class
Automated Email	Day/Time	Content	Call to action
#3	14	<ul style="list-style-type: none"> • Full Class Schedule • Class Details • Instructors' Backgrounds 	<ul style="list-style-type: none"> • Sign Up for a Series of Classes

(Example) The yoga studio

2 Loyal customers - This automated series includes emails with tips designed to help the student master individual poses, emails that provide nutritious recipes, and others with information about applying class learnings to deal with everyday stress.

(Example) Worksheet

Audience: Loyal customers

Automated Email	Day/Time	Content	Call to action
#1	20	<ul style="list-style-type: none"> Learn how to master individual poses 	<ul style="list-style-type: none"> Sign Up for a Class
Automated Email	Day/Time	Content	Call to action
#2	30	<ul style="list-style-type: none"> Recipes to complement your workout 	<ul style="list-style-type: none"> Sign up to meet with the in-house nutritionist
Automated Email	Day/Time	Content	Call to action
#3	40	<ul style="list-style-type: none"> Stress less - exercises to reduce stress 	<ul style="list-style-type: none"> Sign up for this unique program

(Example) The yoga studio

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.

(Example) Worksheet

Audience: Prospects

Automated Email	Day/Time	Content	Call to action
#1	4	<ul style="list-style-type: none"> The benefits of yoga 	<ul style="list-style-type: none"> Drop in for free a class
Automated Email	Day/Time	Content	Call to action
#2	10	<ul style="list-style-type: none"> A beginner's story 	<ul style="list-style-type: none"> Sign up for our specials
Automated Email	Day/Time	Content	Call to action
#3	17	<ul style="list-style-type: none"> Become a new student - 10% Off 	<ul style="list-style-type: none"> Sign up for the discount

(Example) The marketing consultant

Here's how the marketing consultant uses automation:

- 1 Prospects** - Contacts on the prospect list receive a series of emails that detail the core strategies they could use to improve their marketing. Later in the series, the prospect receives an email revealing how the consultant can execute strategies to help the prospect reach their goals. There are also case studies about previous projects the consultant has worked on.
- 2 Current clients** - This automated series keeps current clients up to date on new and existing services that would benefit the client in the next stage of their business.
- 3 New services** - The consultant invites customers and prospects to sign up for educational content that provides details on a current problem they may be experiencing and the new service the consultant is designing to help.

(Example) Worksheet

Audience: Prospects

Automated Email	Day/Time	Content	Call to action
#1	8	• 5 Basic strategies to better marketing	• Set Up a free consultation
Automated Email	Day/Time	Content	Call to action
#2	15	• Put your marketing skills to use to reach your goals	• Attend a free skills workshop
Automated Email	Day/Time	Content	Call to action
#3	22	• Two case studies to learn from	• Check out our webinars to learn more

Audience: Current client

Automated Email	Day/Time	Content	Call to action
#1	10	• (Guide) Learn the basics for selling	• Download the guide
Automated Email	Day/Time	Content	Call to action
#2	20	• New services designed for you	• Schedule a meeting
Automated Email	Day/Time	Content	Call to action
#3	30	• Taking your business to the next level	• Register for the training session

Audience: New services

Automated Email	Day/Time	Content	Call to action
#1	10	• New service: Social media - how to use it	• Sign Up for the Session
Automated Email	Day/Time	Content	Call to action
#2	20	• New service: Closing the deal	• Schedule a Session
Automated Email	Day/Time	Content	Call to action
#3	30	• New service: Expertise in marketing on the web	• Register for the training session

(Example) The nonprofit

Here's how the nonprofit uses automation:

- 1 Volunteers** - Volunteers receive a series of emails that introduce members of the nonprofit's volunteer community and shares 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 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.

(Example) Worksheet

Audience: Volunteers

Automated Email	Day/Time	Content	Call to action
#1	3	• Welcome to the community	• Learn more about event opportunities
Automated Email	Day/Time	Content	Call to action
#2	10	• Recent volunteer projects	• Check out our volunteer projects
Automated Email	Day/Time	Content	Call to action
#3	20	• Impact of our volunteers	• Read their stories

Audience: Donors

Automated Email	Day/Time	Content	Call to action
#1	2	• The history of our cause	• Download the overview
Automated Email	Day/Time	Content	Call to action
#2	8	• Meet the board members	• Check out impact of donors
Automated Email	Day/Time	Content	Call to action
#3	15	• Donating opportunities	• Choose your casue

Audience: Event specific

Automated Email	Day/Time	Content	Call to action
#1	1	• The agenda is growing	• Sign Up for the Session
Automated Email	Day/Time	Content	Call to action
#2	4	• Speaker and sponsor list	• Read the speaker bios
Automated Email	Day/Time	Content	Call to action
#3	7	• How to prepare for an event	• Download the checklist

How will you use automation?

As you can see, automation makes it easy for you to schedule automated emails to engage new and existing contacts. These automated emails allow you to increase engagement with your contacts by delivering personalized, timely, and relevant messages. Once an automated email series is created, you'll be able to eliminate parts of your manual campaign management, giving you more time to focus on other areas of your business.



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automation today.**

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