

Email Marketing Automation

Moderator:
Alaina Capasso
RI Small Business Development Center

Presentation by:
Sabrina Pelletier
Account Manager,
JScott Marketing & PR



We exist to train, educate, and support entrepreneurs of both new (pre-venture) and established small businesses. Positioned within the nationwide network of SBDCs, we offer resources, key connections at the state and national level, workshops, and online and in-person support that equips us to help Ocean State entrepreneurs reach the next level of growth.



THE
UNIVERSITY
OF RHODE ISLAND



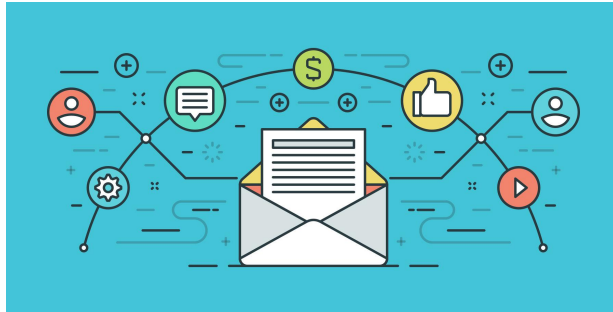
What is Email Automation?

Way to create emails that reach the ***Right people*** with the ***right message*** at the ***right moment***—without doing the work every time.



Why Use Email Automation?

- Enables you to enhance your email campaign without manually sending out individual emails.
- Helps you increase engagement and provide a more tailored email experience to your email list.



How Do I Set Up Email Automation?

- The exact steps may vary based on your email marketing platform
- Typically you can link your website analytics with your email marketing platform
- Once linked, you'll have the ability to target people based on:
 - Behaviors (added items to cart, viewed items, etc.)
 - Preferences
 - Previous sales
 - Etc.



How Many Emails Should be In a Automated Series?

- It depends!
- Choose a length and let the series run for several months
- Then, analyze the data to determine what adjustments are needed
- How to know when adjustments are needed:
 - When the conversion rate begins to drop



Automation #1: Welcome Series

Welcome Series – Benefits

- Put you in control of how subscribers are introduced to your brand
- Helps build a relationship and trust with your customers
- Reduces misperceptions



Welcome Series – Email #1

- **Topic:** Initial welcome email
- **Trigger:** 1 minute after sign up
- **Content:**
 - Welcome the new subscriber
 - Briefly introduce the brand in a few sentences or in list format
 - This should share how Lavish is different from its competition and why shoppers should be excited.
 - Call to action that engages the user such as:
 - Take our hair quiz to find the best products for you
 - Shop our products



Welcome Series – Email #2

- **Topic:** Educate customers further about Lavish’s competitive advantage
- **Trigger:** 24 hours after sign up
- **Content:**
 - Share the main problems customers come to Lavish with and solutions (products) that have helped remedy them
 - Call to action that provides more information: possibly to a blog post, hair quiz, or landing page specifically crafted around shopping by problem/solution



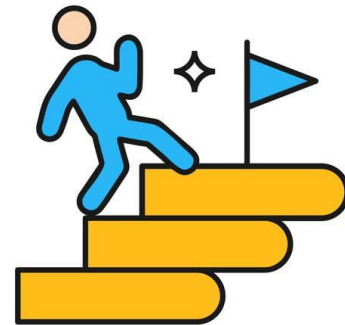
Welcome Series – Email #3

- **Topic:** Tell subscribers more about the brand
- **Trigger:** 72 hours after sign up
- **Content:**
 - Summarize the about page and tell the story of how Lavish started
 - Call to action to read the full about page



Welcome Series – Email #4

- **Topic:** Success story
- **Trigger:** 120 hours after sign up
- **Content:**
 - Share a customer success story.
 - Call to action to read more success stories, or invitation to shop to start writing your own success story.



Welcome Series Example



We're glad
you're here

Now that you're a Starbucks
insider you'll be among the first
to hear about upcoming coffee
news, promotions and more.

Make the most of your experience



Manage your
Starbucks profile,
and contact info
and preferences ▶



Options abound with a
Starbucks Card: reload
it, pay with our mobile
app and more ▶



Join our loyalty
program to earn free
drinks and exclusive
member offers ▶

Automation #2: Post-Purchase Series

Post-Purchase Series – Benefits

- Helps you create a great customer experience
- Attain feedback/reviews from customers
- Lay the groundwork for a second purchase
- Tempt people to come back to your site



Post-Purchase Series – Email #1

- **Topic:** Confirmation of order
- **Trigger:** Any time an order is placed



Post-Purchase Series – Email #2

- **Topic:** Order has been shipped with tracking information
- **Trigger:** When the order placed has been shipped



Post-Purchase Series – Email #3

- **Topic:** Product arrival
- **Trigger:** Two days after an order should have been delivered (if possible)
- **Content:**
 - Inform the customer that their products should have arrived. Ask if the product did arrive and if it arrived safely
 - How to reach customer service in case of any questions or concerns



Post-Purchase Series – Email #4

- **Trigger:** One day after email number three
- **Content:**
 - New customers - Additional support on how to get the best results from the products
 - Existing customers - Personalized recommendations for other products they may like
 - Ask for a review




Post-Purchase Series – Email #5

- **** New customers only****
- **Trigger:** One week after order arrives
- **Content:**
 - Ask for a review
 - Share related products that other customers also enjoyed





my credits: \$0



hooray!

thanks for shopping zulily

Why not tell the world?
Share zulily love & **earn credit**
when friends shop too.

[send invites](#)

Invite a bunch, all at once!



POST ON FACEBOOK

Invite friends on your timeline
or their timelines.



SEND A GROUP EMAIL

One message can reach your
entire address book.



PIN & EARN CREDIT*

Use our Pinterest button as
you shop.

EARN \$15 CREDIT FOR EACH NEW MEMBER WHEN THEIR FIRST ORDER SHIPS. [INVITE NOW](#)

Post-Purchase Series Example

Automation #3: Abandoned Cart Series

Abandoned Cart Series – Benefits

- Improve :
 - Conversion rates
 - Customer relationships
 - Customer experience



Abandoned Cart Series – Email #1

- **Topic:** Remind shoppers of what they've left behind
- **Trigger:** 24 hours after cart abandoned
- **Content:**
 - Details about what items they've left in the cart with photos of the products, if possible
 - Call to action to complete the purchase now



Abandoned Cart Series – Email #2

- **Topic:** Handle objections
- **Trigger:** Send 48 after cart abandoned
- **Content:**
 - Address general objections that might come up that are keeping shoppers from completing the purchase
 - Answer any frequently asked questions shoppers may have
 - Call to action to review their cart and finish their purchase

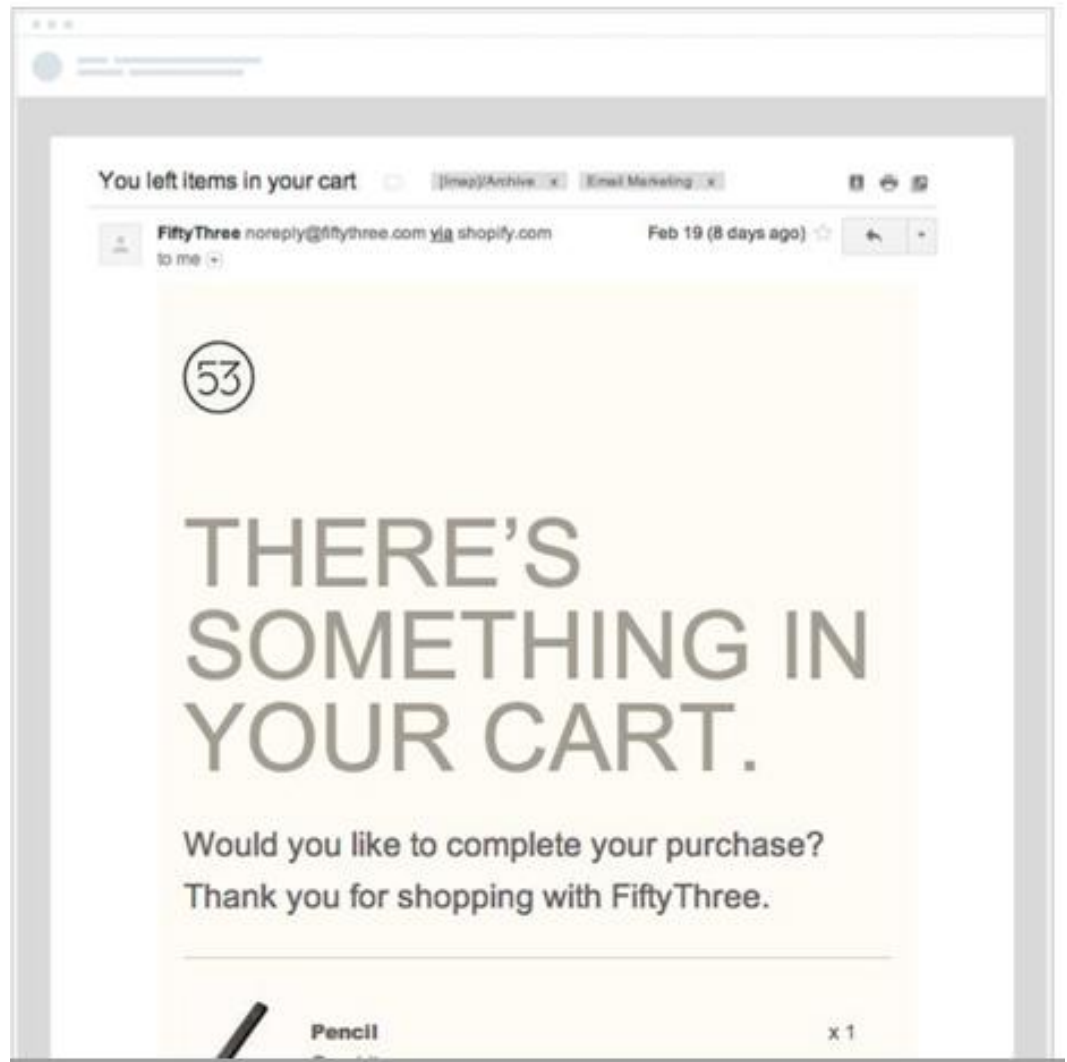


Abandoned Cart Series – Email #3

- **Topic:** Discount or incentive
- **Trigger:** Send 78 hours after cart abandoned
- **Content:**
 - A discount or free gift with purchase.
 - **NOTE:** This should be A/B tested to find the right offer that compels shoppers to take action
 - Details about what items they've left in the cart with photos of the products, if possible
 - Call to action to review their cart and finish their purchase



Abandoned Cart Series Example





Automation #4: Re-engagement Series

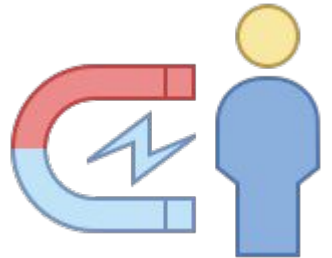
Re-engagement Series – Benefits

- Turn inactive customers into active customers!
- Remove customers from your email list who are not active and do no re-engage



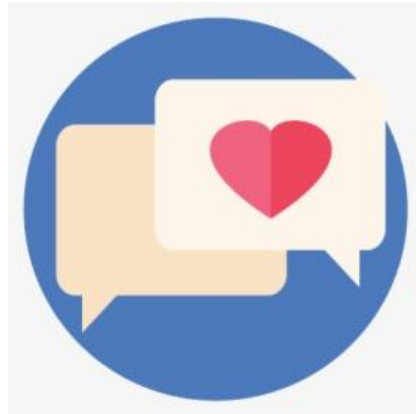
Re-engagement Series – Email #1

- **Trigger:** After a period of time outside the normal purchase cycle, such as eight months after the last order *or not* opening an email or clicking in an email in 60 days.
- **Content:**
 - General “we miss you!” message
 - Ask if they need a refill of the last products purchased.



Re-engagement Series – Email #2

- **Trigger:** Two days after email number one
- **Content:**
 - Offer a discount with a compelling message to make a return visit



Re-engagement Series – Email #3

- **Trigger:** Two days after email number two
- **Content:**
 - Kindly inform the subscriber that you will be deleting or unsubscribing them soon if they do not respond or make a purchase
 - This message should have a specific date for them to take action by. We recommend 48 hours
 - Remind them of the discount in email number two
 - Ask for feedback on why they haven't been opening/clicking emails or making a purchase



Re-engagement Series – Email #4

- **Trigger:** After time period stated in email number three (recommendation: 48 hours) if no action is taken
- **Content:**
 - Inform them that they're been unsubscribed (action must also be taken in the email database)
 - Link to where they can resubscribe to the email list or adjust their email preferences



Re-engagement Series Example

The banner features a top-down view of a meal on a white marble surface. A red napkin is on the left, and a blue bowl of food is on the right. A dark blue circle in the top left contains the text 'Come back and get \$30 OFF'. The main text 'Let's Start Fresh' is centered in a large, bold, dark blue font. Below it, a smaller dark blue box contains the text 'Restart My Deliveries'.

Come back and get
\$30
OFF

Let's Start Fresh

It's been a while since we've cooked together, and we'd love to share our newest recipes and ingredients with you.

[Restart My Deliveries](#)

Automation #5: Purchase Cycle Series

Purchase Cycle Series – Benefits

- Reminds customers to make a purchase
- Drives sales for your business from loyal customers
- Improves customer experience & relationship



Purchase Cycle Series – Email #1

- **Trigger:** When a customer is due for a product replenishment
- **Content:**
 - General messaging of “running low? It’s time to stock up!”
 - Potentially offer free shipping on orders over a specific amount with code or similar low-cost offer
 - Mention subscribe and save option



Purchase Cycle Series – Email #2

- **Trigger:** 48 hours after email number one if no action is taken
- **Content:**
 - Compelling message highlighting the benefits of continuing to use our products and staying stocked up
 - Mention subscribe and save option



Purchase Cycle Series Example

running low on snacks?

Hey Laura! We hope you enjoyed your last order at the graze shop. Is it time to restock on tasty snacks like pure pumpkin seeds?

get shopping



pure pumpkin seeds



pure sunflower seeds



pistachio kernels



sesame garlic crunch sharing bag



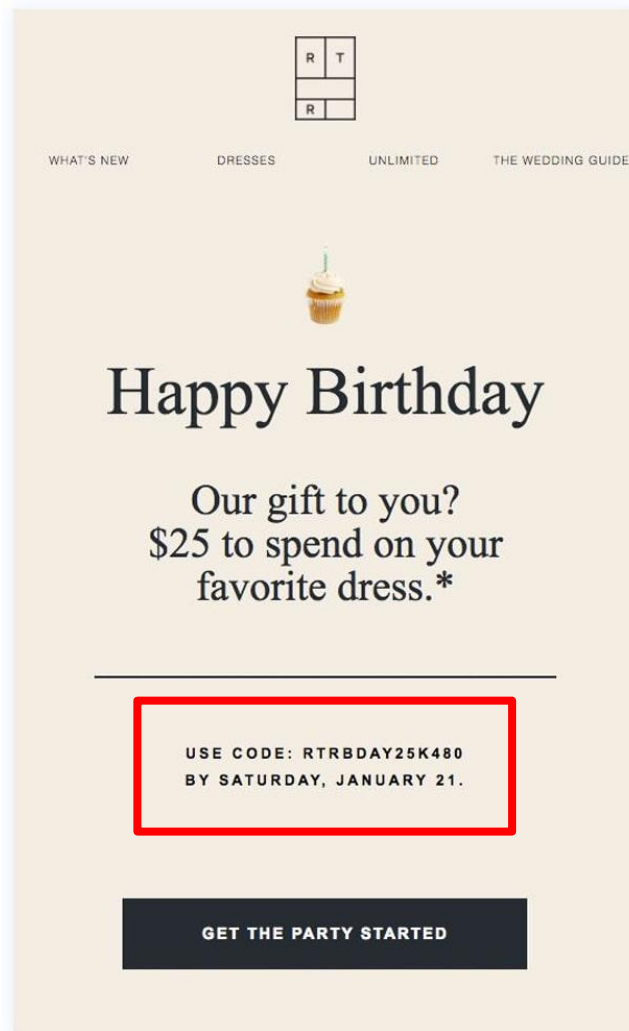
Here at graze, we're always on the lookout for the tastiest new creations. Our **7 new supersnacks** are not only delicious but each contain their own hero ingredient to make our most exciting range yet!

Other Automations to Consider



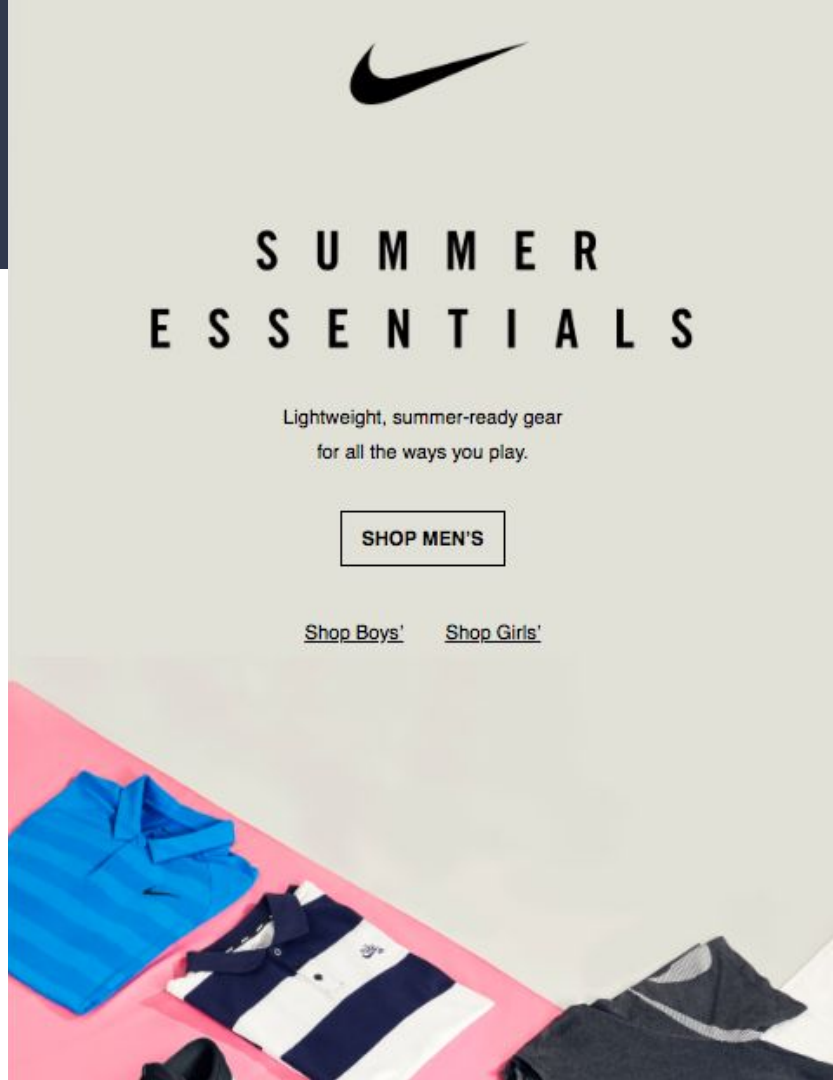
Birthday Emails

- Send one email to customers on their birth
- Offer a freebee or discount code
 - Include an expiration date
- Can be simple and straightforward



Holiday/Seasonal Emails

- Major Holidays
 - New Years
 - Christmas/Hanukkah/Etc.
 - 4th of July
 - Etc.
- Seasonal changes
 - Promo relevant products
 - Seasonal sales



Length of Customer Relationship

- Length of relationship
 - One year
 - Three years
 - Five years
 - So on...



The image shows a screenshot of an email from Crocs celebrating a 1-year anniversary. At the top, the Crocs logo is visible, followed by navigation links: "new arrivals", "women", "men", "girls", "boys", "sale", "jibbitz™", and "ocean minded™". The main content is on a green background. It features a single lit candle icon, the text "HAPPY ANNIVERSARY!", and "THANKS FOR BEING A 1-YEAR CROCS EMAIL SUBSCRIBER.". Below this, it says "ENJOY \$15 OFF" and "YOUR NEXT PURCHASE OF \$75 OR MORE*. SIMPLY ENTER THIS CODE AT CHECKOUT.". A black redaction box covers the discount code. At the bottom, there is a yellow button that says "let's celebrate >".

crocs™

new arrivals women men girls boys sale jibbitz™ ocean minded™

HAPPY ANNIVERSARY!

THANKS FOR BEING A 1-YEAR CROCS EMAIL SUBSCRIBER.

ENJOY \$15 OFF

YOUR NEXT PURCHASE OF \$75 OR MORE*. SIMPLY ENTER THIS CODE AT CHECKOUT.

let's celebrate >

In Stores: cashiers, enter celebrate1 for anniversary savings. Online Shoppers: enter code above during checkout. Offer must be redeemed within one month of receipt. Cannot be applied to past or pending purchases or combined with other coupons.

Number of Orders Placed

- After X amount of orders
 - 5 orders
 - 10 orders
 - 20 orders?
 - Whatever works for your biz

ONEHOPE
RED | WHITE | GIFTS | COFFEE

NOW THAT YOU'VE PURCHASED A FEW TIMES WITH US, WE FEEL COMFORTABLE SAYING...
we love you!

Thank you for being a loyal ONEHOPE customer. By purchasing our products, you are part of a bigger movement that is making the world better each day. Take a look at the impact you are part of:

END HUNGER.
1,041,752 MEALS FOR CHILDREN

SAVE OUR PLANET.
39,214 TREES PLANTED

FUND PET ADOPTIONS.
6394 ANIMALS

The graphic is a vertical card with a white background and a wooden border. At the top, it features the ONEHOPE logo and social media icons. Below is a message of appreciation and a list of three social impact metrics, each accompanied by a product image (beer bottles) and a corresponding icon (apple, tree, dog).

Product Back in Stock

- Re-engage customers
- Allows you to resell to customers who were unable to purchase a product they wanted
- Drive “right-now” buys because the item is in demand and customers don’t want to miss out *again*

YOU'RE IN LUCK!

That sold-out item you loved is back in stock.



MEN DRY STRETCH SWEATPANTS

GIMME

And so many more...

Questions?

Type your question to the chat box

Contact Us:

401-874-7232

<https://bit.ly/regRISBDC>

susandavis@uri.edu

