Email Marketing Automation Cheatsheet

A quick reference guide to email marketing automation, covering key concepts, strategies, and best practices for creating effective automated email campaigns.

Fundamentals of Email Automation

Core Concepts

Email Automation: Triggered emails sent based on user actions or predefined schedules.

Benefits: Increased efficiency, personalized customer experience, improved engagement, and higher conversion rates.

Triggers: Events that initiate automated email sequences (e.g., signup, purchase, abandoned cart).

Examples:

- New subscriber joins mailing list
- Customer makes a purchase
- User clicks a specific link

Segmentation: Dividing your audience into smaller, more targeted groups based on specific criteria.

Criteria: Demographics, purchase history, engagement level, interests.

Personalization: Tailoring email content to individual recipients based on their data and behavior.

Techniques: Using customer names, suggesting relevant products, referencing past interactions.

Key Performance Indicators (KPIs)

Open Rate	Percentage of recipients who opened your email.
Click-Through Rate (CTR)	Percentage of recipients who clicked a link in your email.
Conversion Rate	Percentage of recipients who completed a desired action (e.g., purchase, signup).
Bounce Rate	Percentage of emails that could not be delivered.
Unsubscribe Rate	Percentage of recipients who unsubscribed from your email list.

Email Automation Platforms

Popular platforms for setting up email automation include:

- Mailchimp
- Klaviyo
- HubSpot
- ActiveCampaign
- Sendinblue

Building Automated Email Sequences

Welcome Series

Purpose: Introduce new subscribers to your brand and encourage initial engagement.

Elements:

- Welcome email with brand introduction
- Information about your products/services
- Exclusive offers or discounts
- Links to key website pages

Example Sequence:

1. Immediate welcome email
2. Email highlighting top products (3 days later)
3. Discount offer (7 days later)

Abandoned Cart Emails

Purpose: Recover lost sales by reminding customers about items left in their cart.

Elements:

- Reminder of items in cart
- Incentive to complete purchase (e.g., free shipping, discount)
- Clear call to action

Example Sequence:

1. Reminder email (1 hour after abandonment)
2. Incentive email with free shipping (24 hours after abandonment)
3. Final reminder (3 days after abandonment)

Post-Purchase Emails

Purpose: Build customer loyalty, encourage repeat purchases, and gather feedback.

Elements:

- Order confirmation and shipping updates
- Thank you message
- Product usage tips and resources
- Request for feedback or reviews
- Personalized product recommendations

Example Sequence:

1. Order confirmation email (immediately after purchase)
2. Shipping update email (when order ships)
3. Product usage tips (3 days after delivery)
4. Review request (7 days after delivery)
5. Personalized product recommendations (14 days after delivery)

Segmentation Strategies

Demographics	Segment based on age, gender, location, income, etc.
Purchase History	Segment based on past purchases, product categories, or spending habits.
Engagement Level	Segment based on email opens, clicks, website visits, or other interactions.
Lead Magnet Downloads	Segment based on the specific lead magnets users have downloaded, indicating their interests.

Advanced Automation Techniques

Behavioral Triggering

Definition: Triggering emails based on specific actions users take on your website or in your app.

Examples:
- Visiting a specific product page
- Spending a certain amount of time on a page
- Downloading a resource

Implementation: Use website tracking tools (e.g., Google Analytics, pixel tracking) to identify user behavior and trigger relevant emails.

Dynamic Content

Definition: Customizing email content based on individual recipient data, preferences, or behavior.

Examples:
- Displaying different product recommendations based on purchase history
- Showing different offers based on location
- Adjusting messaging based on gender

Implementation: Use email marketing platform's dynamic content features to insert personalized content into your emails.

A/B Testing

Definition: Testing different versions of your emails to see which performs better.

Elements:
- Subject lines
- Email content
- Call-to-action buttons
- Send times

Implementation: Use your email marketing platform's A/B testing features to create and track different versions of your emails.

Best Practice: Test one element at a time to isolate the impact of each change.

Lead Scoring

Definition: Assigning points to leads based on their behavior and engagement to identify the most promising prospects.

Criteria:
- Website visits
- Email opens and clicks
- Form submissions
- Social media interactions

Implementation: Use your CRM or marketing automation platform to set up lead scoring rules and prioritize leads based on their scores.

Best Practices and Legal Considerations

Email Deliverability

Sender Reputation: Maintain a positive sender reputation by sending relevant emails to engaged subscribers.

Strategies:
- Use a dedicated IP address
- Authenticate your emails (SPF, DKIM, DMARC)
- Monitor your bounce rate and unsubscribe rate

List Hygiene: Regularly clean your email list to remove inactive subscribers and invalid email addresses.

Methods:
- Send re-engagement campaigns
- Remove hard bounces immediately

Legal Compliance

CAN-SPAM Act (USA): Ensure your emails comply with the CAN-SPAM Act by including:
- A clear and conspicuous unsubscribe link
- Your physical postal address
- Accurate header information

GDPR (Europe): Obtain explicit consent from subscribers before sending them marketing emails.

Requirements:
- Clearly explain how you will use their data
- Provide an easy way to withdraw consent

Content Optimization

Subject Lines: Write compelling subject lines that entice recipients to open your emails.

Tips:
- Keep them short and concise
- Use personalization
- Create a sense of urgency
- Avoid spam trigger words

Email Body: Craft clear and concise email content that is easy to read and understand.

Guidelines:
- Use a clear and logical structure
- Include visuals to break up text
- Focus on the benefits for the recipient

Call to Action (CTA): Include a clear and prominent CTA that tells recipients what you want them to do.

Examples:
- Shop Now
- Learn More
- Sign Up