Worksheet module 4

Automation

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Test your knowledge: work out a workflow scenario

Below is a workflow scenario created using the different steps from Module 4 - Automation. Develop a workflow using that scenario. To get you started, we premade the structure for you to complete with the correct data (triggers, actions, waiting periods…).

Workflow scenario:

Identify your audience: People who subscribed to your newsletter. They are new contacts who show interest in your product and brand.
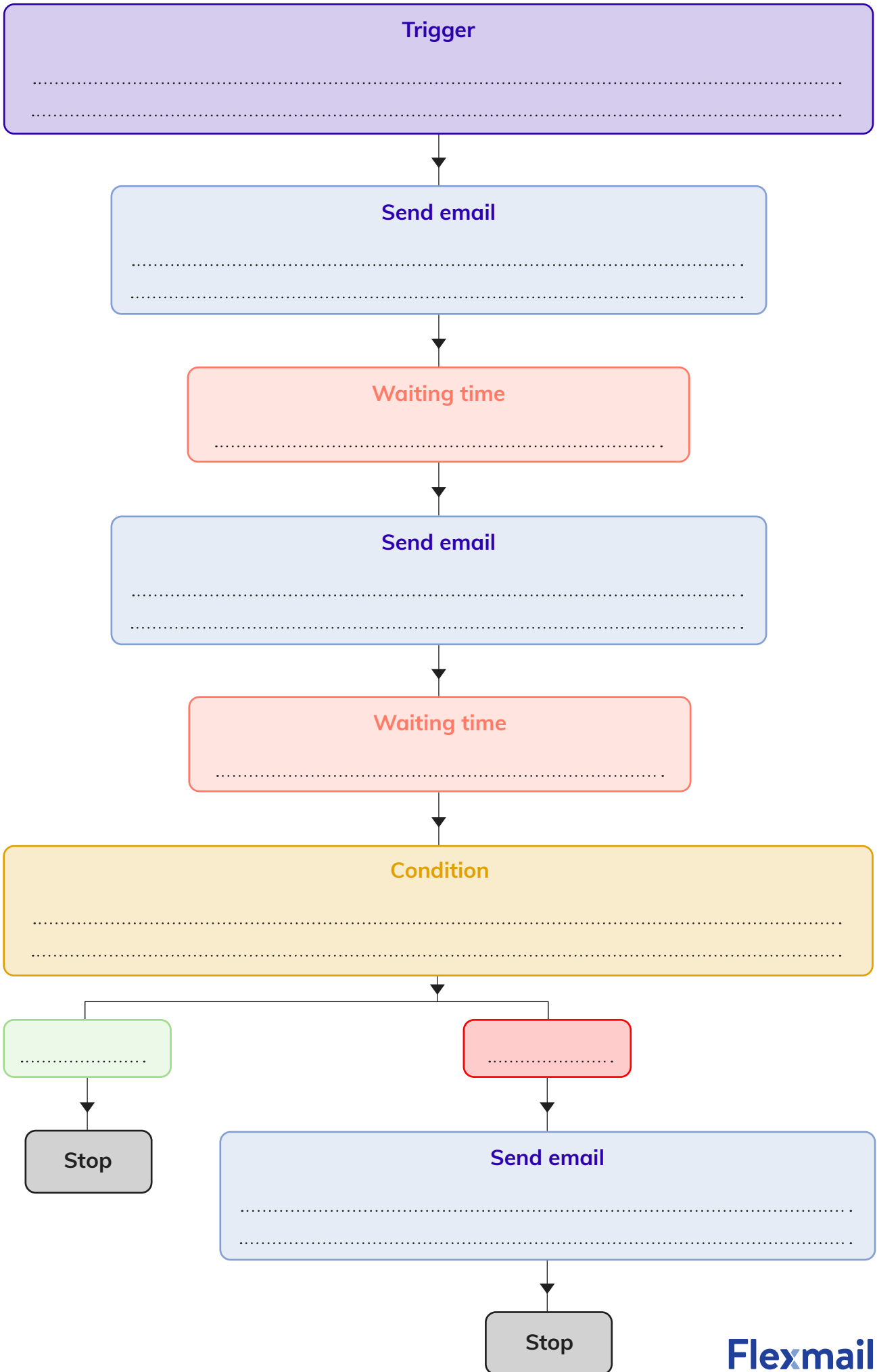
Determine your goal: Set up a future flow to inform new contacts (leads) about the different functionalities of your product.

Define criteria: Newsletter subscription via opt-in on your website.

Identify the actions of your software: From the moment they subscribe to your newsletter, you immediately send a welcome email thanking your new contacts for their subscription. A week later, send an informative email about all of your product features. Then wait five days before checking whether the email has been opened. Has the email been opened? Then stop the workflow. Has the email still not been opened? Send a reminder email about all your product functions after which the workflow will be stopped.

What you need: Opt-in form for your email communication, welcome email "Thank you for subscribing!", informative email "Discover all our features", reminder email "Don't miss our features".

Further develop the scenario on the next page.

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Trigger

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Send email

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Waiting time

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Send email

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Waiting time

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Condition

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Stop

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Send email

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Stop

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Set up your own workflows

Now it's your turn! Work out one or more workflow scenarios that fit your marketing goal(s). Using the questions below, you can easily develop a workflow with the necessary triggers and actions for your contacts to perform.

Tip: We recommend starting your workflow on paper. First bring all of your steps together before building the workflow in your email marketing tool and/or CRM system.

Some questions to get you started:

Identify your audience: Who do you want to reach? What type of contacts should end up in your workflow? What are their needs? What data have you collected about them (customer journey stage, interests, click behaviour...)? ...

Determine your goal: what do you want to achieve? Do your contacts need to learn something, buy something, download something? Do you want to boost your sales?

Define criteria: What criteria do your contacts have to meet to get into the workflow? What triggers the workflow (e.g. product X purchased, campaign Y opened)? ...

Identify the actions of your software: How will the workflow work? What logical steps do your contacts have to take? What actions do your contacts have to take? Should certain emails be delayed? When will the workflow end? ...

What you need: What do you need to achieve your goals? What content are you going to send? Discount codes? Invitations? Reminders? We-miss-you campaigns? Surveys? Landing pages? ...

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Workflow 1: ……………………………………….

Identify your audience: ………
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Determine your goal: ………
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Define criteria: ……..
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Identify the actions of your software: …………………………………………………………………………………………
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What you need: ……..
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Draw your workflow on the next page.

Trigger

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Workflow 2: ....

Identify your audience: ....
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Determine your goal: ....
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Define criteria: ....
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Identify the actions of your software: ....
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What you need: ....
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Draw your workflow on the next page.

Trigger

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Workflow 3: ……………………………………….

Identify your audience: ....
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Determine your goal: ....
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Define criteria: ....
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Identify the actions of your software: ....
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What you need: ....
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Draw your workflow on the next page.

Trigger

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Solution: work out a workflow scenario

Trigger
Contact subscribes via opt-in form: **Newsletter subscription**

Send email
Thank you for subscribing!

Waiting time
1 week

Send email
Discover all of our features

Waiting time
5 days

Condition
Contact opened: **Discover all our features**

Yes

No

Stop

Send email
Don't miss our features

Stop
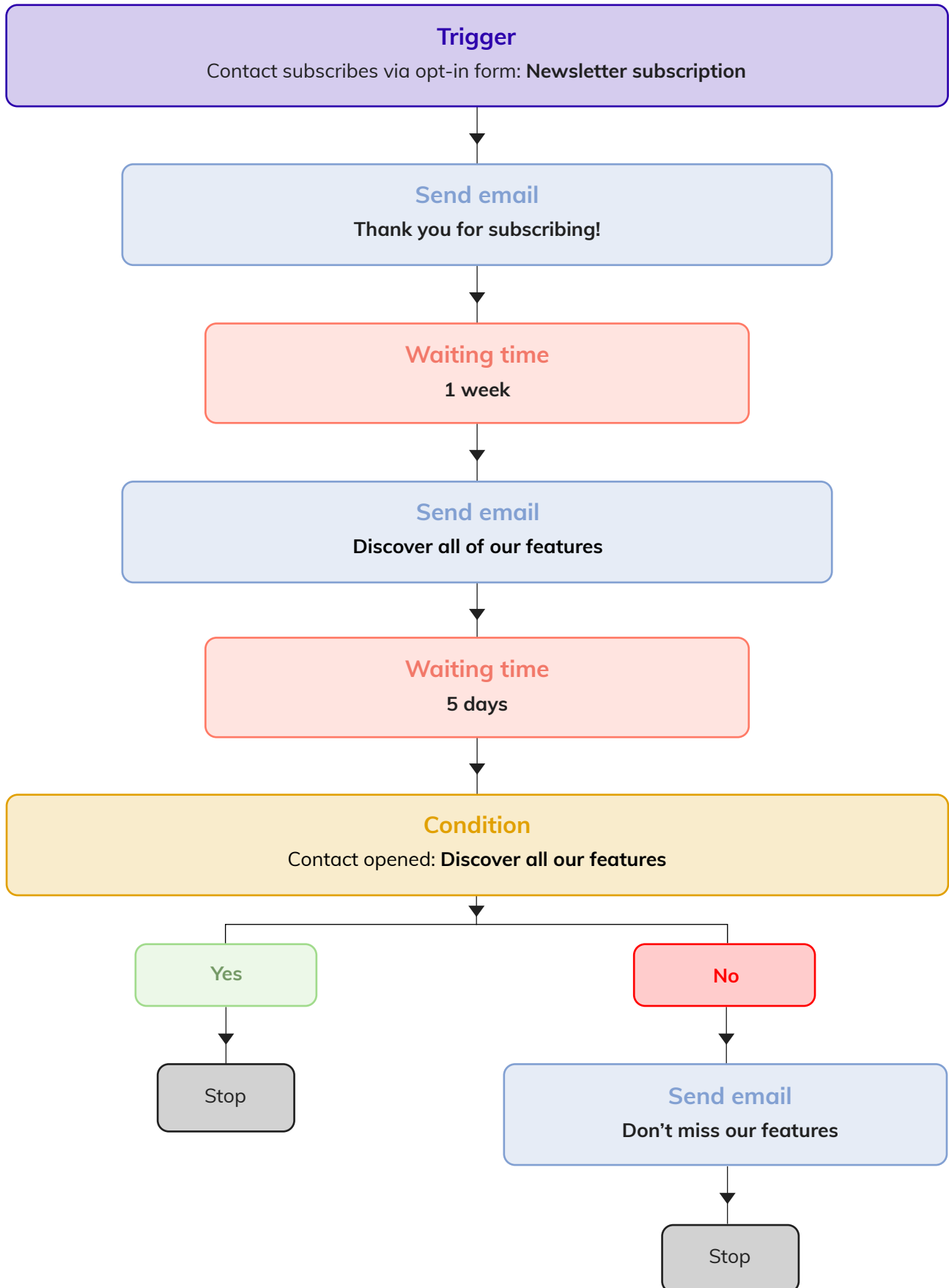
Did you develop your workflow correctly? Well done!

Would you like to learn more? Then be sure to check out these great workflow examples

- Example workflow: [Welcome message](#)
- Example workflow: [Welcome series](#)
- Example workflow: [Sales follow-up](#)
- Example workflow: [Follow-up on contact request](#)
- Example workflow: [Recurring occasion](#)
- Example workflow: [One-time occasion](#)
- Example workflow: [Follow-up event](#)
- Example workflow: [Event reminder](#)

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