



4

MUST HAVE

**AUTOMATED EMAIL
SEQUENCE CHECKLISTS**



Writing emails is a delicate balance of creativity and strategy. While the primary motivation should always be to provide your audience with valuable information in an authentic manner, many marketers struggle in successfully accomplishing this goal.

Take a look at the following outlines for four types of automated email sequences to help you create organized, interesting and authentic correspondence with your audience.

4

MUST HAVE AUTOMATED EMAIL SEQUENCES

1. Welcoming (New Subscribers)
2. Promotional
3. Lead Nurturing
4. Re-engagement



EMAIL SEQUENCE

WELCOMING (NEW SUBSCRIBERS)

EMAIL 1: A Friendly Hello

The only goal for your first email to new subscribers is to make them feel welcomed and to remind them why they subscribed in the first place. So, get creative, say hello and make sure information for your products and services are easily accessible from the email.

Remember: they subscribed, so they are already interested in what you have to say. This is not a sales email, so don't bombard them with hundreds of emails with flash sales and offers.

WHAT TO INCLUDE:

- ☐ An excited greeting!
- ☐ Thank you/celebration of them subscribing
- ☐ What to expect (what type of content, frequency)
- ☐ Call-to-action to check out your site and link up on social media

Pro Tip:

KNOW YOUR KEY MESSAGE.

Figure out what you want to say, and then determine how many emails it will take to say it. What do your new subscribers need to know about your brand and your product/services? If you're a nonprofit, perhaps telling your new audience about the history and mission of the organization will be more impactful.



Email 2: How (it) Works

Now is the time where you talk about your company and their products/services. Be brief yet comprehensive. This email should equip your audience with all the information they need to browse and understand your website and your offerings.

Take this opportunity to show what makes you unique. Is it your ability to customize your product to fit the needs of your consumers? Or maybe it is your company's history of maintaining a stellar customer service reputation.

WHAT TO INCLUDE:

- ☐ Your brand's story
- ☐ Something unique about your product/service and any information to make them a more informed customer (how it works, specifications, processes)
- ☐ How they can connect with you and learn more (website and social)

Email 3: Get Them Up to Speed

Your new subscribers haven't been receiving your emails, so think of them as being a little "out of the loop." Consider an email to get them up to speed, including upcoming events, a new announcement, helpful resources, etc.

The last email of your welcoming drip campaign should fully equip your new users/customers with the ability to utilize all the tools and resources you offer.

WHAT TO INCLUDE:

- ☐ What's new? What may your new audience have missed?
- ☐ A link to helpful resources, product descriptions, etc
- ☐ A call-to-action to explore your website and view your product

2 EMAIL SEQUENCE PROMOTIONAL

EMAIL 1: Pique Interest & Build Excitement

It all starts with the subject line. What does your audience get excited about? What entices them to click, to read, to buy? These things are helpful to know, so be sure to learn about your recipients along the way.

Depending on the depth of the purchasing decision, you may want to give your audience a heads up prior to the promotion. Sending an email dedicated to building excitement or offering a sneak peak into the upcoming promotion gets your brand on the minds of your potential customers.

WHAT TO INCLUDE:

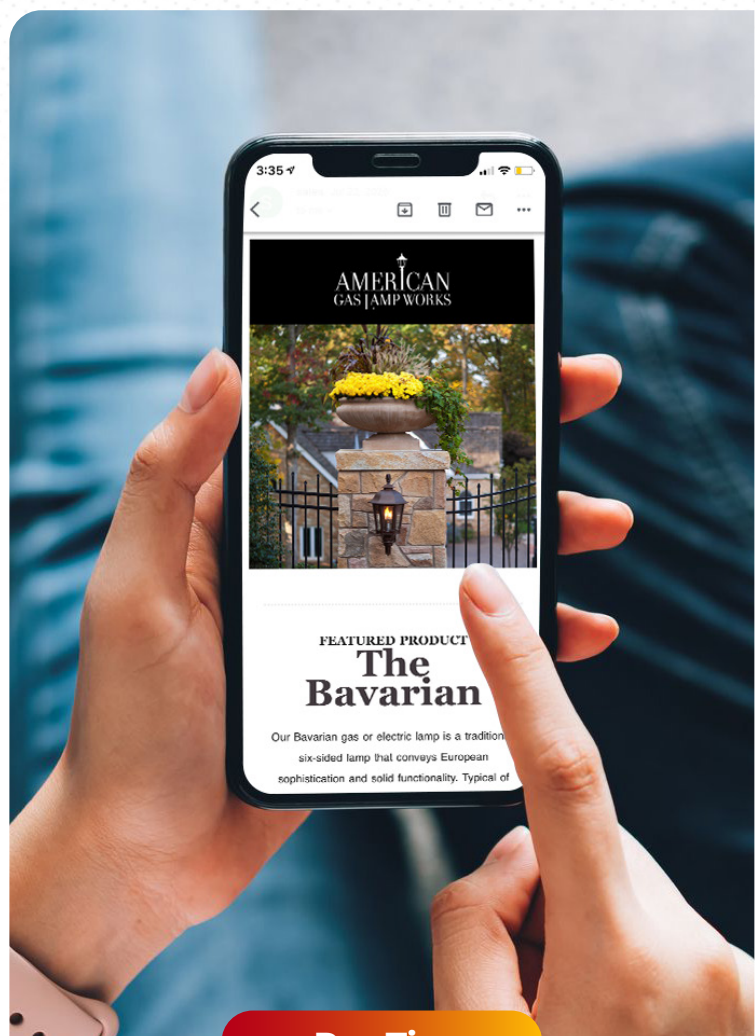
- ☐ A strong subject line
- ☐ Promotion guidelines (When does it start? How long will it last? What is the value of the promotion?)
- ☐ A strong call-to-action (CTA)

Email 2: Create a Sense of Urgency

Deadlines entice decision making. Make sure your subject line creates a sense of urgency for your promotional offering so that your audience will need to act swiftly. Make your CTA stand out, and most importantly, make sure your audience understands the value of your offer.

WHAT TO INCLUDE:

- ☐ A strong subject line
- ☐ Clearly communicate the value of the offer
- ☐ Include the deadline
- ☐ A strong CTA



Pro Tip:

KEEP THE SALES CYCLE IN MIND

The timing of your promotional emails will be dependent on your sales cycle. If purchases tend to happen quickly, make sure your drip campaign is front-loaded. If the sales cycle runs for a couple of weeks, spread out your touch points.



EMAIL SEQUENCE

LEAD NURTURING

EMAIL 1: A Warm Introduction

Go for something quick and straight to the point. When nurturing leads, to-the-point tactics tend to offer more promising results. Don't make the recipient have to dig through the email just to figure out who you are and what you want. As far as the CTA goes, a simple yes or no question usually does the trick. Make it as easy as possible to respond.

WHAT TO INCLUDE:

- ☐ Personalized greeting
- ☐ A quick introduction of yourself and your company
- ☐ Link/button with the opportunity to learn more
- ☐ Ask a yes or no question

Email 2: Show Transparency

Honesty is always the best policy, especially at this delicate relationship building stage. Show your audience what exactly it is that you do and the true benefits you can offer, but be careful. You do not want to mislead or "oversell" your audience with unmet promises. This is also your opportunity to show your recipient that you care. Customize your message by addressing an unmet problem of theirs that you may be trying to solve. This allows for a genuine connection to develop. Simplicity is still a crucial factor at this point, so be sure your message remains clear.

WHAT TO INCLUDE:

- ☐ Personalized subject line
- ☐ Personalized greeting
- ☐ Personalized content tailored to your audience's needs (industry, company and role specific)
- ☐ Call-to-action geared toward making a personal touch-base (phone call, meeting, etc.)
- ☐ Links to resources to learn more and provide additional credibility

Email 3: Case Studies

If you are in front of a potential customer who did not make their way to you via referral, they may have little to no background on what makes your product or service unique. Case studies are a great way to build intrigue and trust, with the opportunity to customize the story based off of the lead you are pursuing.

WHAT TO INCLUDE:

- ☐ Personalized greeting
- ☐ Download or attachment with case study (PDF, video, etc.)
- ☐ Call-to-action geared toward making a personal touch-base (phone call, meeting, etc.)
- ☐ Links to resources to learn more/provide additional credibility

Email 4: Soft Sell

You may not always be able to offer them a free trial based off your product or service offering, but you can offer them a demo or an opportunity to speak with you or someone from your team one-on-one. The sales pitch can often feel pushy and overwhelming, so be sure to maintain a friendly approach. You have come too far in the lead nurturing process to push your audience away with an overly forward hard sell.

WHAT TO INCLUDE:

- ☐ Personalized greeting
- ☐ Special offer (demo, free trial, consultation, etc.)
- ☐ Call-to-action encouraging a direct touch-base
- ☐ Link to resources for an opportunity to educate your audience and build credibility

Pro Tip:

KNOW WHO TO ADD TO THIS LIST.

Are your new leads ready for this email series? If you are talking about your product or service in greater detail, offering exclusive deals or complimentary consultations, brand new leads may not yet be appropriate for this stage of communication.



4 EMAIL SEQUENCE RE-ENGAGEMENT

EMAIL 1: Remind Them of What They're Missing & Offer Something Special

Your audience subscribed to receive emails from you at one point in time, so maybe they need a small reminder that you are still here. Remind them of what made them sign up in the first place. Offer them helpful and timely content, an exclusive download or even a discount code to entice a new purchase. You aren't trying to trick your audience to re-engage, but are simply reminding them of their interests.

WHAT TO INCLUDE:

- ☐ A nice "we missed you"
- ☐ Remind them of what made them sign up in the first place (Is it your company values? Your customizable product?)
- ☐ A special offer
- ☐ A call-to-action encouraging them to reach out/re-engage

Email 2: Get Their Feedback

You're dying to know why they aren't answering. So, just ask. A simple "hey, we haven't heard from you in a while, are you still interested in receiving our emails? Is there anything we can do on our end?" is an easy way to measure their interest.

You don't want an email list with people that are radio silent on the other end, so don't be offended when individuals decide to unsubscribe.

WHAT TO INCLUDE:

- ☐ A friendly reminder that you're still there!
- ☐ An opportunity for your audience to reach out or re-engage
- ☐ An option to opt-out





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