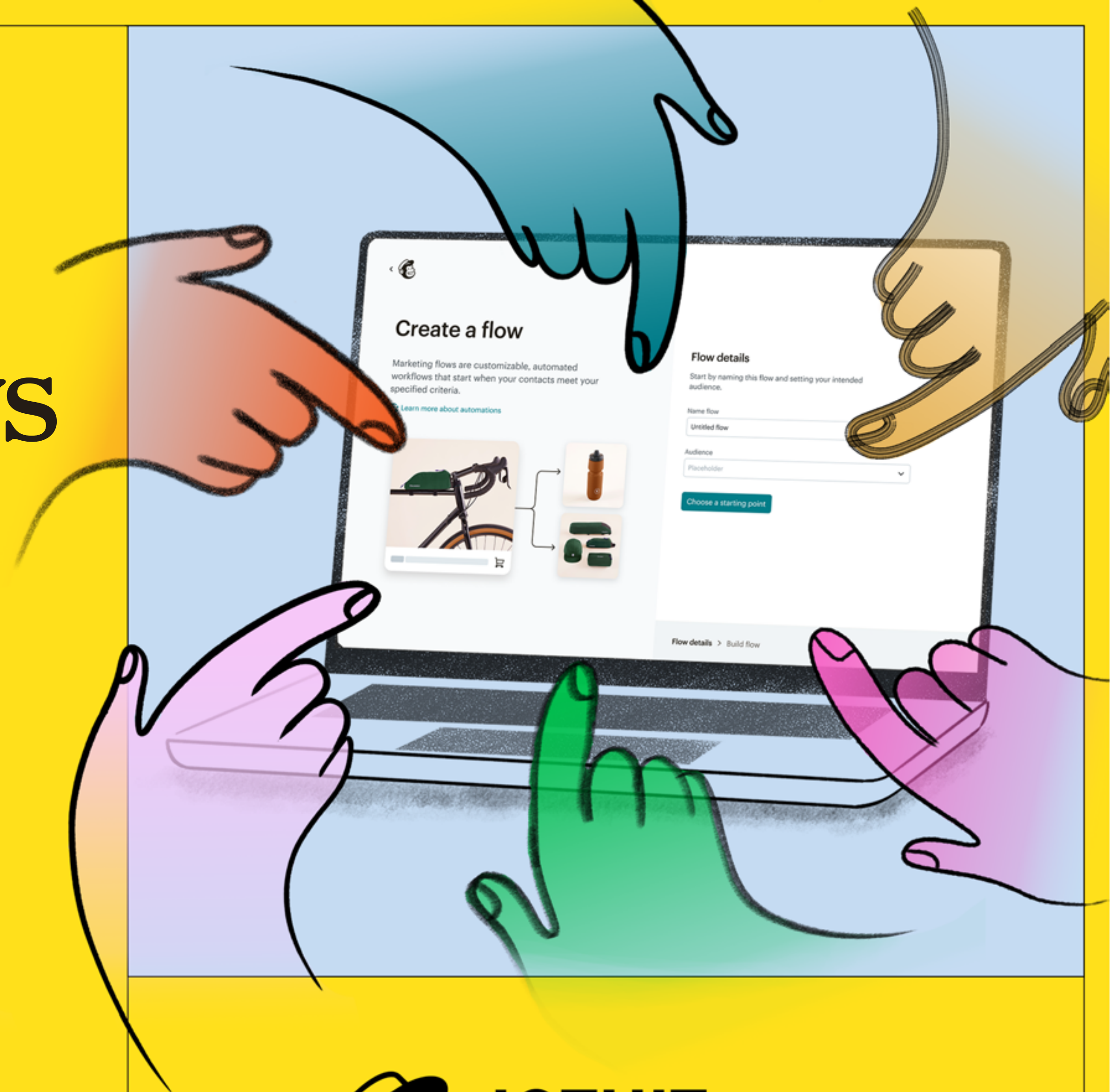


Harnessing the Power of Marketing Automation Workflows



Build great, personalized customer experiences

Packed with time-saving insights:

Setting triggers

Building workflows

Planning pop-ups

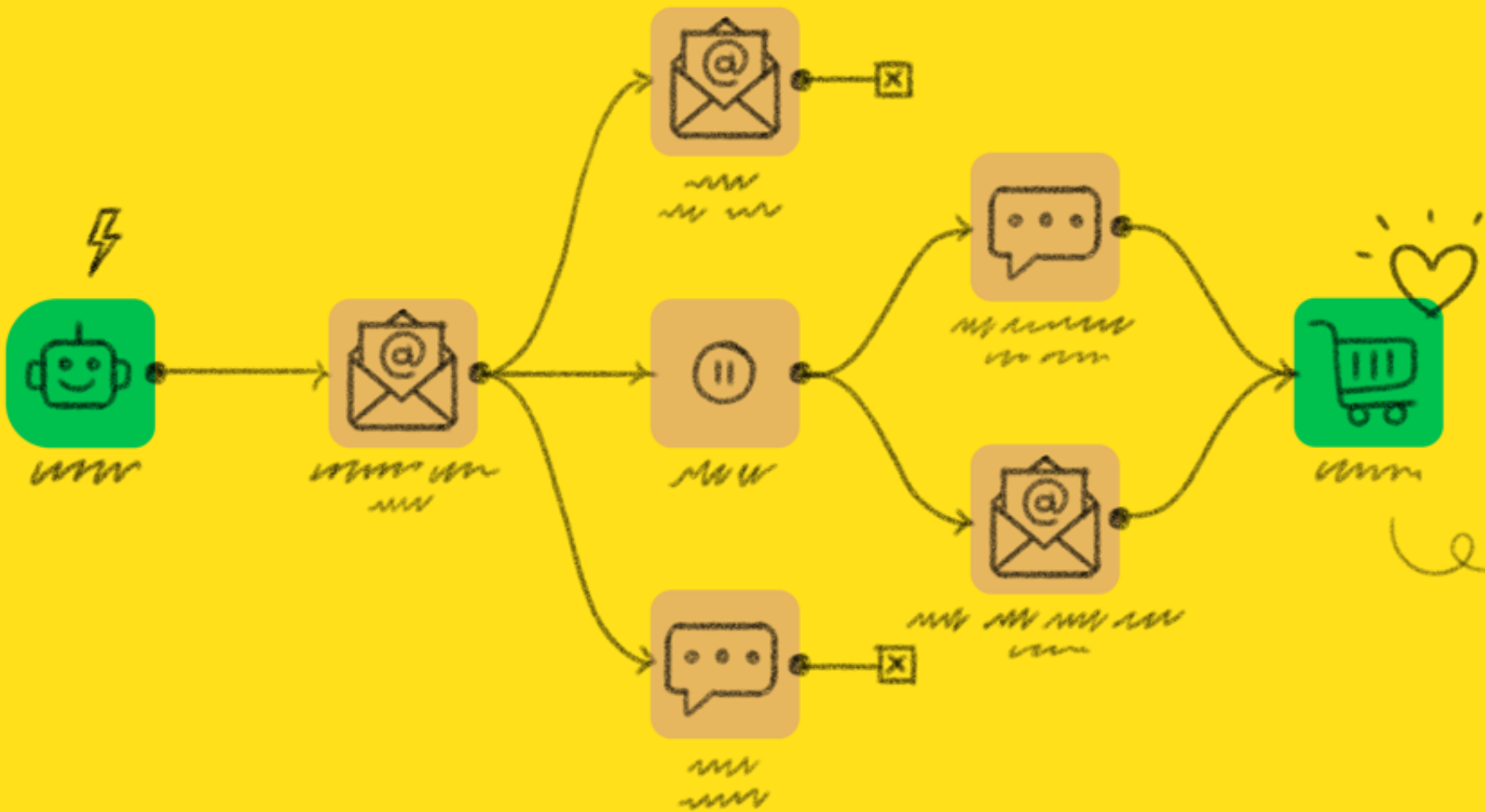
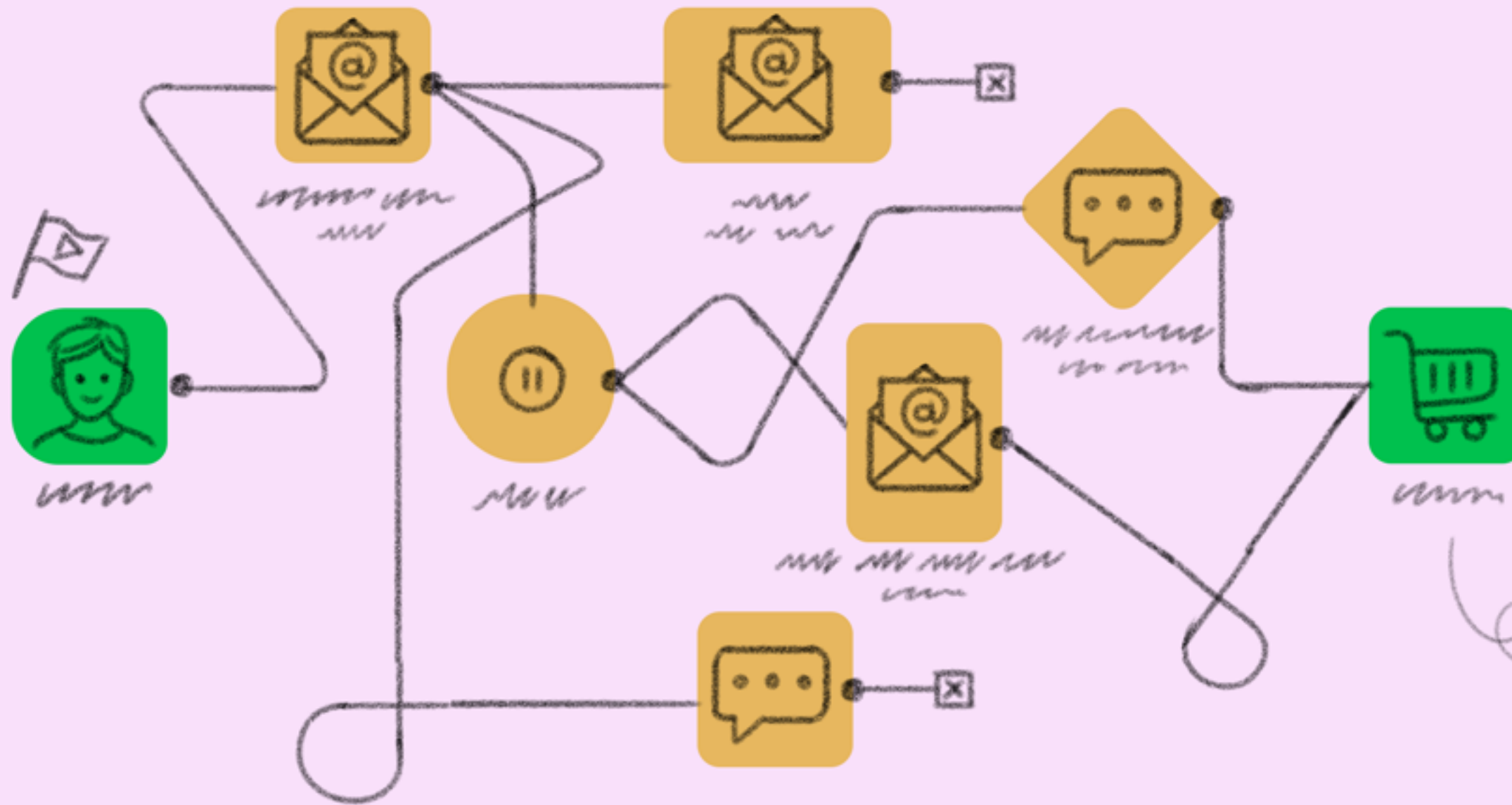
Tracking response



INTUIT
mailchimp

It's personal

Automation makes your marketing more human. This is the paradox that can still make some marketers and business owners resist the idea of “automating” their customer relationships. Yet the State of Marketing Automation report, from Ascend2, shows that 89% of the marketing professionals surveyed agree that automation has helped them build effective workflows. The trick is to get started; once you're into the flow, you'll wonder how you ever managed without it.



Automation in waiting

Mailchimp customers with paid plans have powerful marketing automation capabilities built-in to their suites as standard. It's ready to go right now, giving you a tremendous opportunity to create customer experiences that help build loyalty, boost revenue and profits.

- You can get closer to customers, with a deeper understanding of their tastes and preferences
- You can run sophisticated, personalized campaigns that don't feel automated and deliver great results
- You can save time and increase the return on your marketing investment

Automation is about more than interactions with customers. Once you have automation working effectively, you have a more holistic, integrated view of your audience. Your programs can generate a wealth of valuable data that may help make every new step along the customer journey more effective.

At the same time, automation can be invaluable in helping you stay compliant with key processes like opt-ins and opt-outs. It also means your data storage and management is simplified, because it helps to bring siloed data sources together.

The feel-good factor

The key benefit of marketing automation is that it helps to keep customers loyal and therefore may reduce the cost of repeat sales.

There are countless statistics out there showing how much more expensive it is to sell to a new customer than it is to sell to an existing one, but it's also plain common sense. Customers who buy once are more likely to buy again if you look after them.

Which brings us back to that paradox: automation can make customers feel valued and appreciated.

87%

of consumers say their preferred brands make them feel good.

Mailchimp and Canvas8: The Science of Loyalty

Planning automation triggers

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A simple definition of marketing automation is that it uses software to manage customer communications, or marketing-related processes that would otherwise be handled by people. It works well with existing customers and nurturing strategies, but it also has a valuable part to play in acquiring new customers and generating leads.

Everything depends on the triggers that prompt your customers to respond. An automated workflow uses If/Else, or conditional split, principles to get the right message to the right customer, at the right time.

This is a much-simplified example of an automation workflow. The key point is that each of the steps shown is planned and programmed to run without human intervention.



1 You launch a new promotion inviting customers to accept an offer by a given date.



2 Customers that respond immediately trigger a “thank you” message that also includes guidance on next steps.



3 Customers that don’t respond immediately trigger a follow-up reminder message, which is sent after a suitable interval has elapsed.



4 Customers that don’t respond before the deadline might trigger an alternative offer, or a “sorry you missed it” message.

Pick the patterns

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A fully-fledged automation program will employ much more sophisticated triggers. It follows that a successful campaign depends on a deep understanding of what those triggers are.

The automation workflow planning tools within Mailchimp can give you practical insights into what customers love, where they struggle, and how they interact. They can track website engagement and gather data from every touchpoint.

The patterns that emerge become meaningful insights that help to create genuinely personalized customer experiences.

This kind of personalization involves much more than the customer’s name. It’s about proposing the right products, customizing messages to acknowledge previous interactions, or even adjusting the contents of web pages.

More than:

60%

of North American consumers say they’re more likely to engage with a personalized email.

More than:

80%

of North American consumers prefer to buy from brands that personalize customer experiences.

Dynamic Yield: the state of personalization in email

Trust your insight

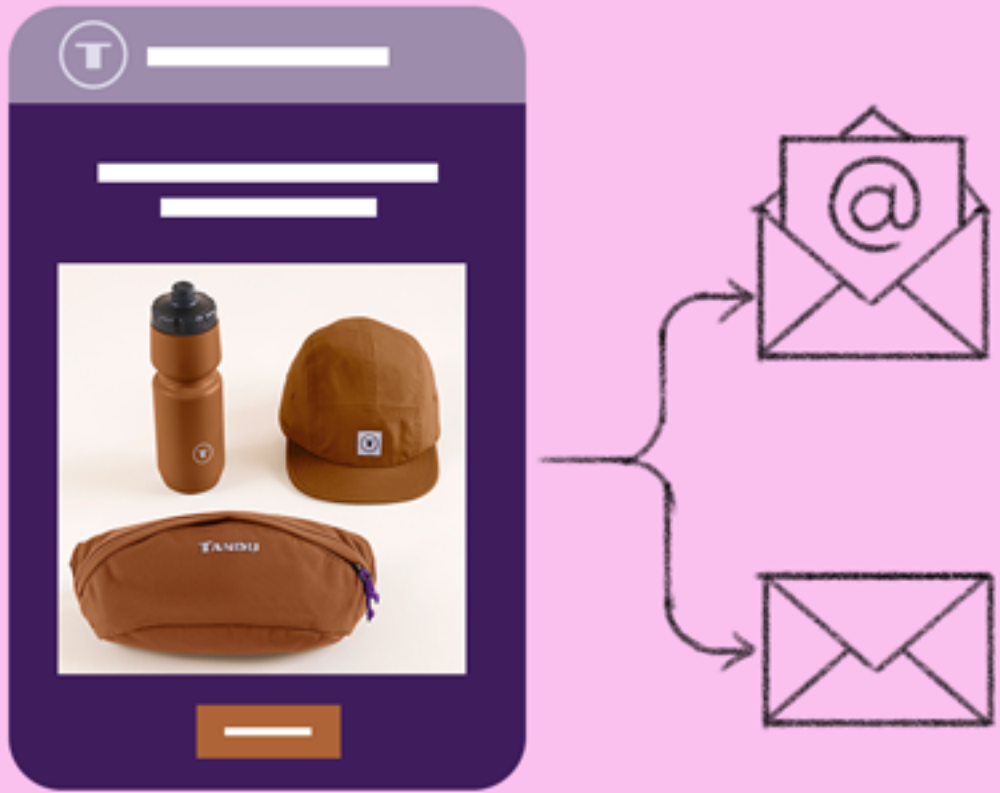
If you’re already using some form of email and SMS marketing, it’s likely you’ve already done a lot of planning that will make your marketing automation programs effective.

- The response data from your campaigns will provide insights that help you select the most effective triggers.
- If you’re using customer segments to target your campaigns more effectively, your segmentation strategy will provide key triggers for your marketing automation program.
- You may have insights that show days, or times of day, when different groups of customers are more responsive, or when “unsubscribes” increase.

- Some customers may only ever respond to special offers, while others are seasonal in their habits, perhaps only engaging in spring or fall.
- Demographics can be powerful triggers, such as age, gender identity, marital status, employment status and more.

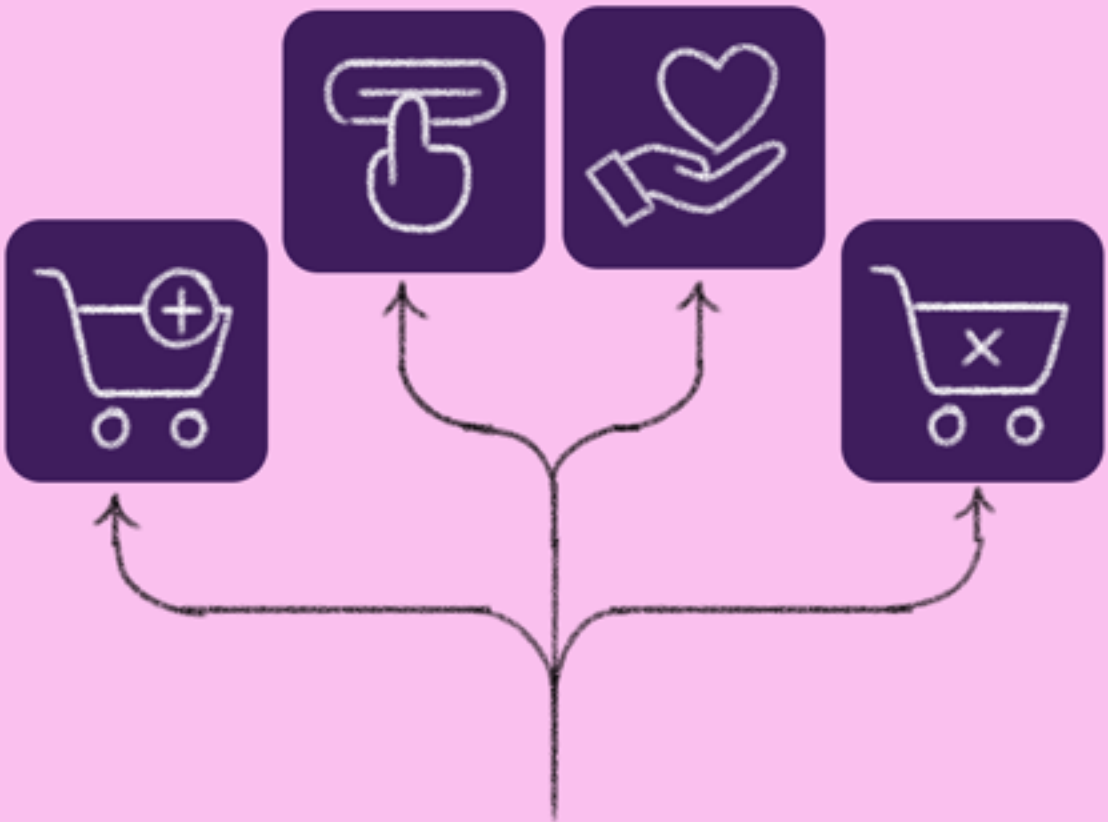
These are just some examples of the data that you can use to design triggers for your automation program. If you’re starting from scratch, you’ll need to give thought to all of these and any other relevant factors that might contribute to an effective strategy.

Other classic triggers might include:



Running a campaign

Opened/not opened/clicked/not clicked



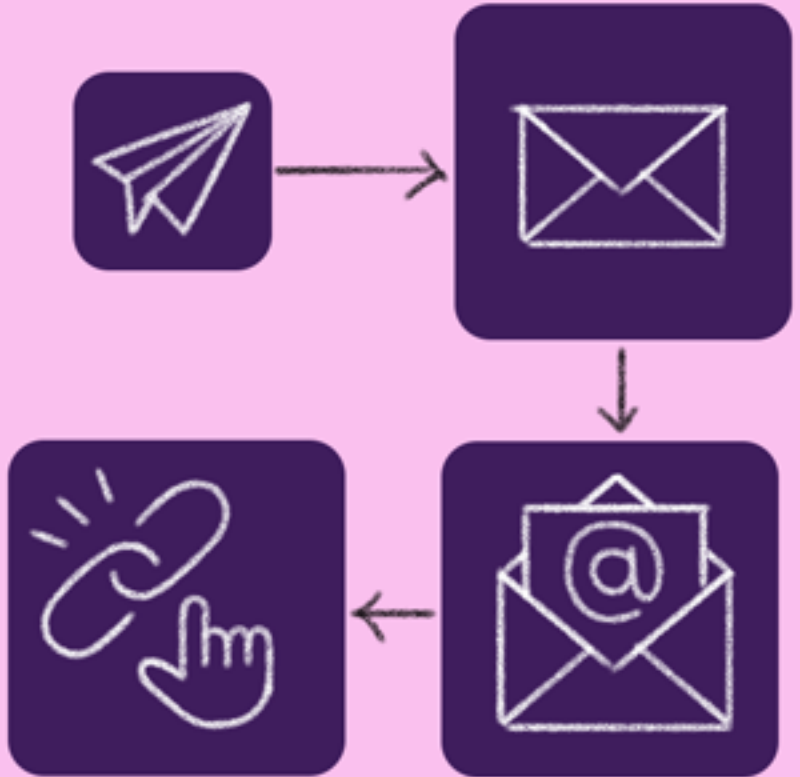
Transactions

Makes a purchase/subscribes/donates/abandons cart



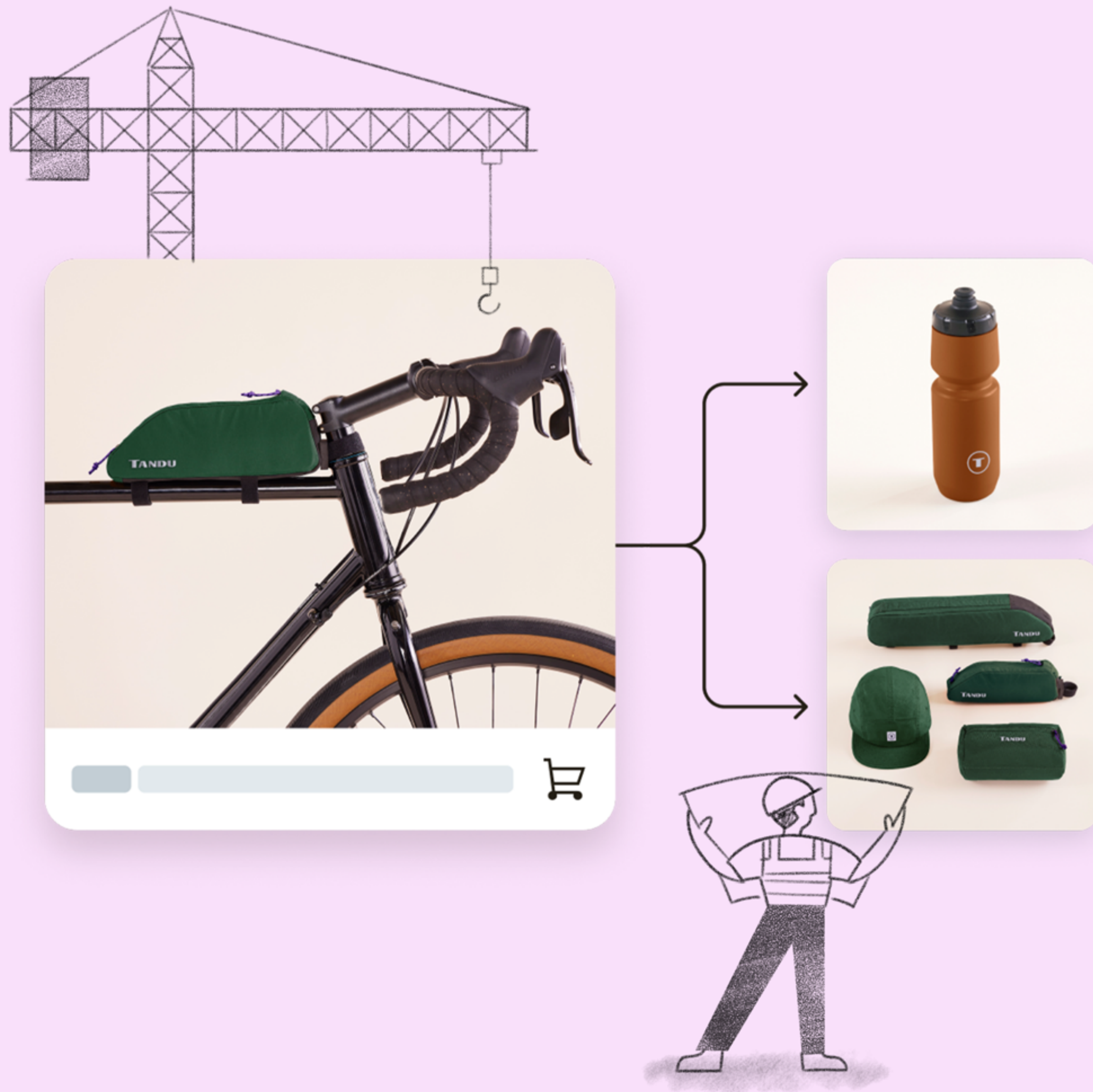
Audience management

Sign up/change to details/joins or leaves a subscribed group



Workflow activity

Follow-up emails/clicked emails/clicked links



Two essential points to remember

- Your automation planning must be aligned with, and driven by, your brand and your wider marketing strategy. Automation is a communications tool, it won't do your marketing for you!
- Pace yourself and don't get too elaborate. You can start with small campaigns to trial your automation plans and then scale up when you have solid data to refine your approach. But don't overdo it; too many segments, triggers, and conditions can be cumbersome to manage and are unlikely to deliver substantial added value.

Designing automated workflows

You can set up an automated workflow for any marketing process that involves clear triggers. A trigger can be anything from a completed web form, to a click on a social post, or an opened email.

Pick a template

Within Mailchimp, you can use one of the pre-built automation templates, or design a customized journey of your own. Follow the prompts in the Automation Workflows to add a name to your campaign.

Define your triggers

You have plenty of pre-defined triggers to choose from, such as “joins your audience,” “abandoned cart”, or “makes a purchase”. Take care to choose the trigger that best fits the customer action. This is a key ingredient of a personalized customer experience.

Build your workflow

Use the drag-and-drop email editor to design personalized messages for each step of the journey. Customize your emails with your brand’s look and feel and insert merge tags to tailor the experience to each customer. A merge tag is a placeholder that automatically pulls data from your database to help personalize messages. For example, the most commonly used merge tag is `*|FNAME|*`, which inserts your customer’s first name into the email. A merge tag might also pull in location data, or allow you to create personalized subject lines.



1



2



3

Set the timing and add conditions

You can schedule when emails should send, or social campaigns should appear, after a trigger event. Use the If/Then logic within the workflow editor to add conditions and additional paths.



4

Review, test, and activate

Take no chances. Use the tools built-in to Mailchimp to test, check, test again, and then activate when everything is working as it should. Take care to proof and sense-check all the content. Once you're satisfied, activate your automation and let Mailchimp handle the distribution.



5

Monitor and optimize

Once the campaign is running, use Mailchimp's reporting features to monitor the performance. Analyze key metrics such as open rates, click rates, and conversion rates. Use the insights you gather to refine segments, adjust timing, or update content.



6

More than email: incorporating touchpoints across multiple channels

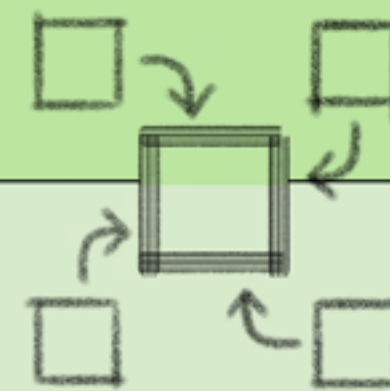
Marketing automation is about personalizing the customer journey wherever your customers choose to connect with you. It helps to ensure consistency across every channel, not just in terms of your brand identity, but in terms of the whole experience.

As well as your website and social media presence, key digital touchpoints might include:

- Your customer support chat
- Online reviews and testimonials
- Online ads
- Mobile apps
- Podcasts or video channels

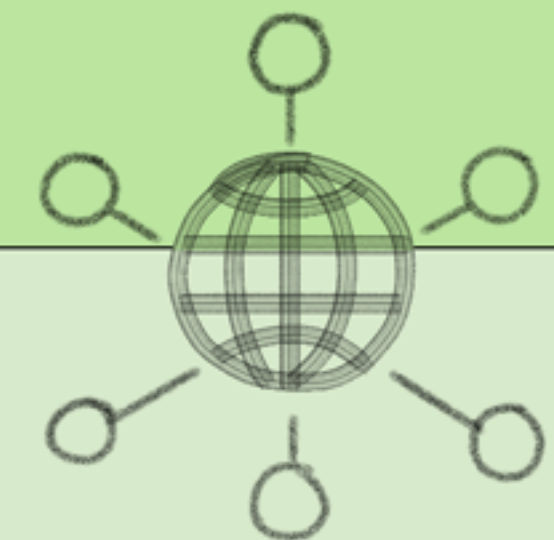
1 Get your data together

You need to start with a consolidated, clean and current database. That way, everything comes into a central place and you have a clear picture of what's happening. It may also be easier to ensure regulatory compliance and avoid messy duplications when you have an integrated database.



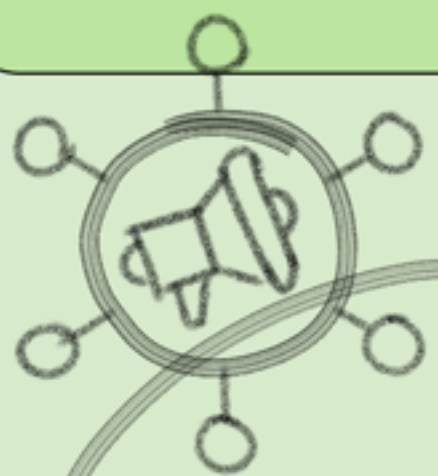
2 Connect your channels

Mailchimp's native integrations help you bring together your social media and advertising accounts. You have built-in connections with Facebook and Instagram, so you can coordinate your campaigns.



Open every channel

You can use Mailchimp’s multichannel marketing tools to build campaigns that extend beyond email. Start by setting up an automated email trigger, then add social ads or SMS messages that trigger based on the same customer actions. You can align your channels so that every touchpoint reinforces your message and helps to deliver your goal.



3

Set triggers in every channel

You can use Mailchimp automation to set integrated If/Then conditions across all the channels in your campaign. If a subscriber clicks an email link, you could configure the workflow to follow up with a tailored social post or an SMS reminder.



5

Align messaging and branding

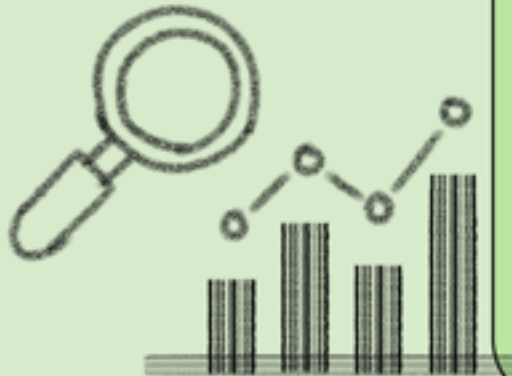
Keep your messaging and branding consistent, adapting your content to suit the requirements of each channel. Short and urgent messages, such as alerts about offer deadlines, are great for SMS, while more detailed and nuanced messages are best sent as emails.



4

Track, analyze and evaluate

You get a clear and up-to-date picture with Mailchimp’s customizable dashboards. You can evaluate engagement for each channel—email, social, SMS—and see how touchpoints work together at each stage, continuously testing and refining your content and your workflow to drive better performance.



6

Getting popups right, for form's sake

What do you mean, pop-ups are annoying? That's only because they're so often done badly.

If you use them in the right way, they can be invaluable tools for capturing customer data, prompting deeper engagement, and introducing new offers.

The primary role for pop-up forms is to encourage visitors to your website or landing page to opt-in to your email and SMS marketing programs. You have plenty of creative freedom with the design of your forms, so they can match your brand style, and include eye-catching imagery and inviting buttons.

You can choose incentives, such as discounts or exclusive content, to encourage sign-ups. It pays to test the content and offers you present, to see which of them resonates most with your audience.

The forms are easy to design within Mailchimp. You can pick from our template library and then customize your design with the logos, fonts, images and other content you want to include. There's plenty of guidance on how to set your forms up for the right people, in the right places, as well as how to publish them within Mailchimp, or to a compatible site of your own.





Pick your pops

Pop-ups allow for some sophisticated targeting. As always, relevance and timing are the keys, and you can set triggers based on visitor behavior, such as the time they spend on a particular page, or specific actions they take.

Forms are also valuable tools for ensuring compliance with data protection regulations. You can collect consent directly through the form, helping to grow your database of opted-in customers.

Once your forms are in place, you can track their performance within Mailchimp, with metrics such as sign-up rates and engagement levels, to help refine your strategy and improve performance.

More clicks, fewer tuts

With a little care, you can turn pop-ups into powerful and engaging ways of communicating with customers.

Mini quiz forms are often particularly effective. They ask customers for a little more information about what they are looking for, or their reasons for visiting the page. With the right phrasing, they can add an inviting personal touch that gives you another valuable nugget of insight about the customer.

Key points to bear in mind about form design include:

- Keep them simple—don't overwhelm customers with too many fields
- Avoid surprises—let your customers know exactly what they're signing up for
- Get mobile friendly—the form builder built-in to Mailchimp is mobile-first, and you can check the desktop version alongside to make sure they both look good
- Try before you fly—preview and test your forms before you launch, to make sure they have the right impact

Once you've got your forms looking good and working well, start testing when and how they appear. We've all visited web pages where a form pops up before we've had the chance to find what we were looking for. The best retail service people allow customers to browse a little before they offer help, and the same principle applies to pop-ups.



When and where to pop

You can experiment with time-based triggers, launching a form after the customer has been on the page for a preset period. You can also set forms to appear when a customer scrolls to a certain point on the page, or when they look likely to leave (such as a long period of inactivity, or moving the mouse to the exit button). Scrolling is an indicator of closer engagement, so a relevant and useful form could make a good impression at the right moment.

Think about placement, too. Some businesses use forms that block the content behind, which can grab attention and generate clicks if they present a strong offer. However, make sure you make it obvious and easy to close the form if your customers don't want to engage at that point.

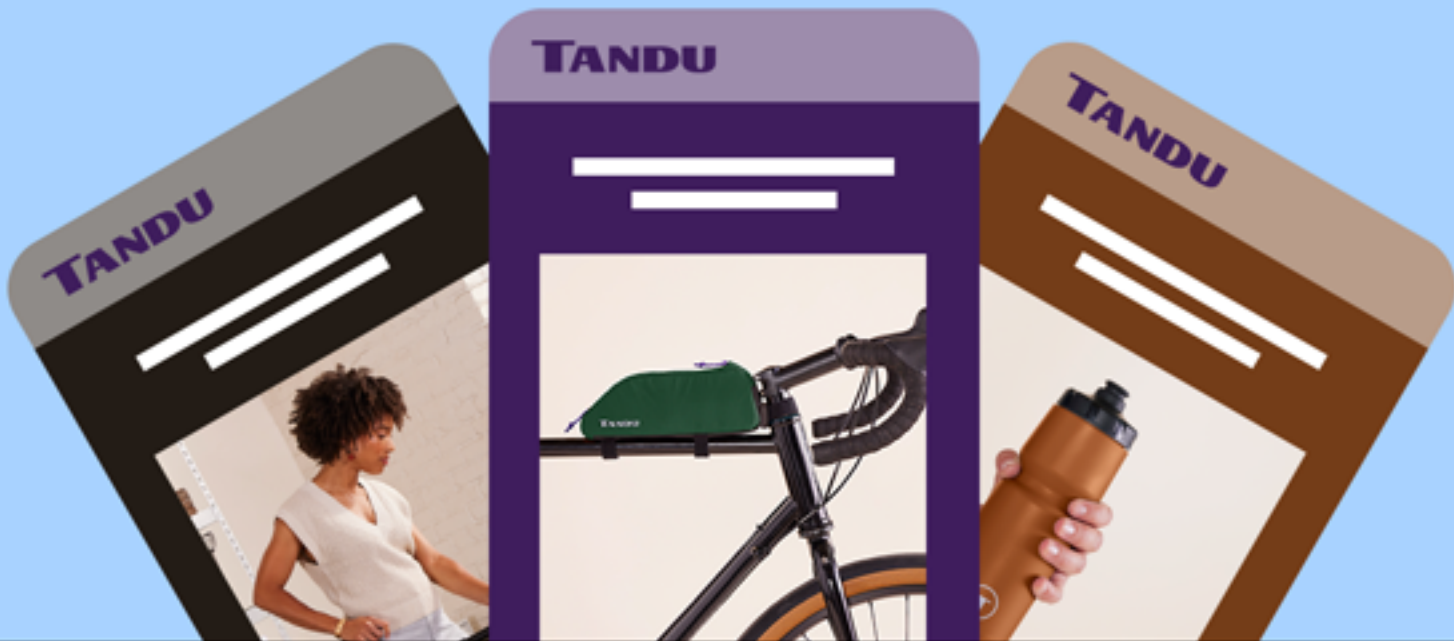
Other options include a discreet invitation to click on an icon in the corner of the screen, or a form that pops up to one side while leaving the main content visible. It's all about giving your customers control, while nudging them towards the response you want.

Automation in action

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Now let’s take a look at some real-world examples of marketing automation at work. Often, we’re talking about processes that can be easily pre-programmed, with enough personalization to make them feel welcoming and relevant. But remember there is such a thing as too much automation; the more complex you make your workflow, the bigger the risk of something going wrong and the less time and effort you will save.

Each use case employs specific triggers and tailored messaging. Start by defining what you need to achieve at each stage and consider the customer journey from the first contact though to the long-term relationship. Timely, regular communication, with fresh content that is relevant to each customer group, can secure loyal and profitable business over many years.



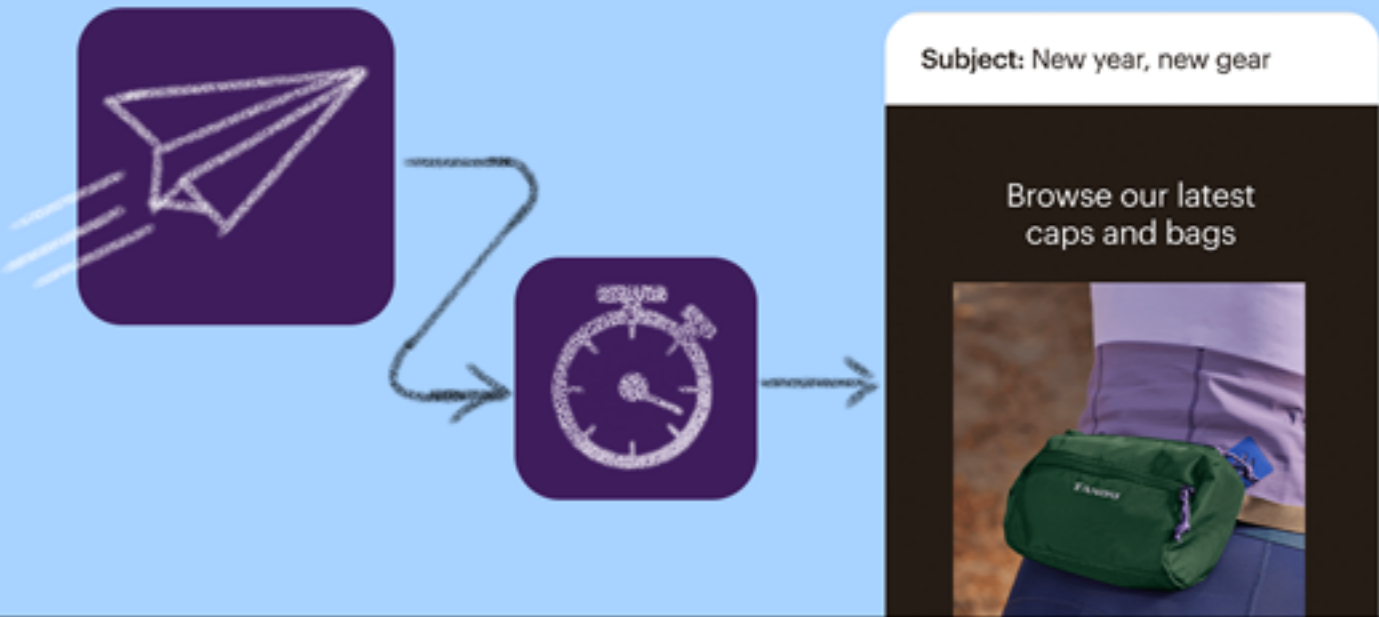
Welcome new contacts: Every new contact can receive a personalized series of welcome emails that introduce your brand, set expectations, and provide extra information about your products and services.



Abandoned cart emails: If customers fail to complete a transaction, or abandon a cart with items still in it, a gentle email or SMS reminder can nudge them to return. The reminder might include an offer or incentive to complete the process.



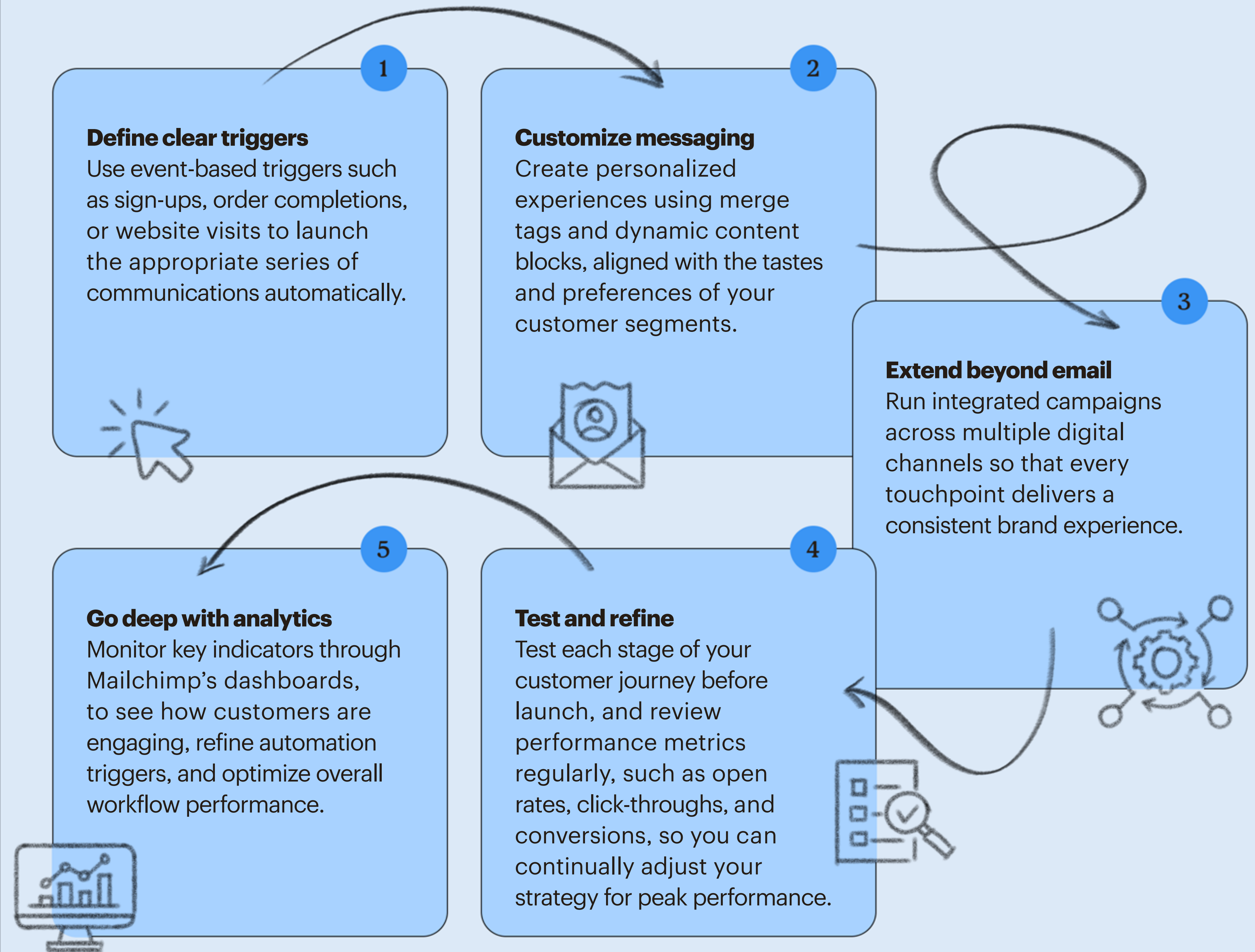
Transaction confirmations: When a customer subscribes, or buys, or donates, you can send prompt, informative messages that confirm the details, set out the next steps (such as shipping information), and offer additional recommendations or related products.

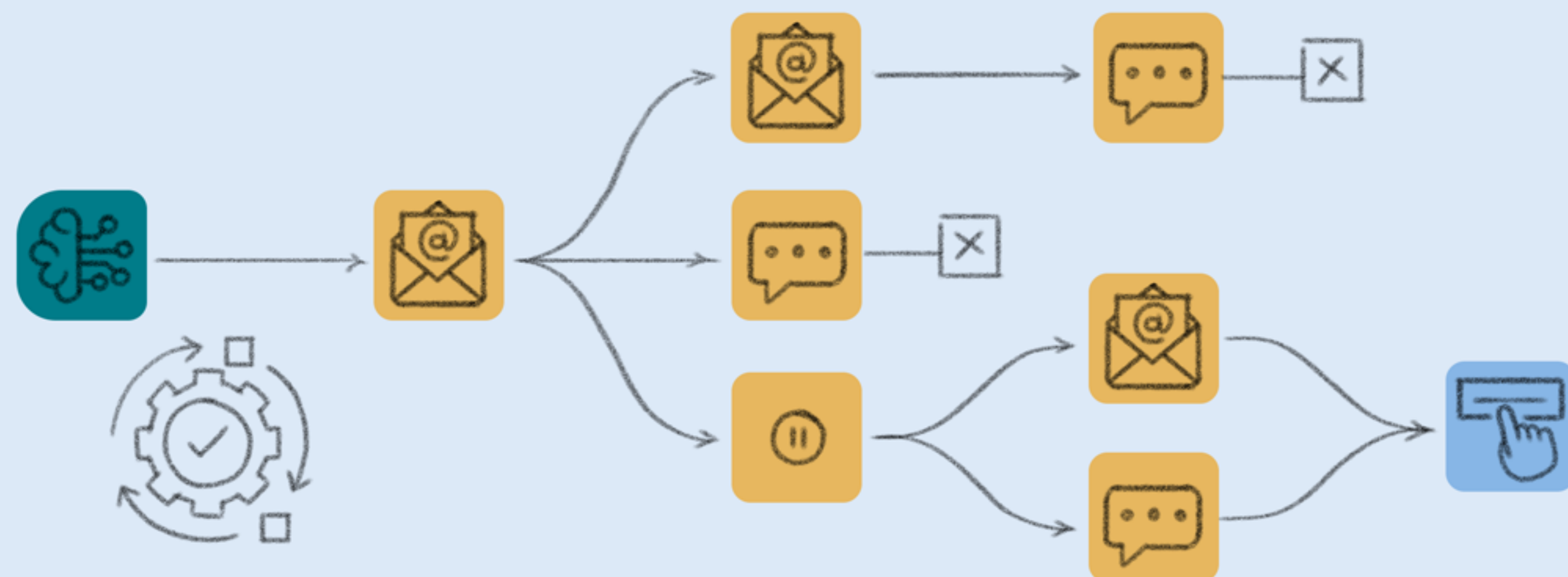


Re-engagement: You can automate the process of getting back in touch with lapsed customers, setting a suitable interval before the activity is triggered. You might begin with some news about your brand as a general reminder for them to keep in touch, and follow up with more specific offers and incentives to re-engage.

Your automation toolkit

Everything you need to create effective and rewarding customer journeys is built-in to your Mailchimp platform. Automation Workflows offer an intuitive, drag-and-drop interface and use versatile, ready-made templates that allow you to design workflows mapped closely to your business objectives.





The truth is, these disciplines and techniques are not new. What we’re talking about are the proven principles that professional direct marketers have used for decades. The big difference is that you can apply the insights you gain from each campaign at speed, and adjust in real time. And you can let the tech do the laborious stuff while you plan your next strategic move, working with robust and timely data.



What’s working, what needs work?

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Your Mailchimp suite equips you with powerful reporting and analytical tools. You get a complete view of your email and cross-channel performance, showing what works and where improvements can be made. Your marketing automation strategy is based on fresh, timely data that allows you to apply, test and refine your decision-making in real-time.

The information is presented in meaningful and customizable dashboards, showing the impact of each campaign, according to your preferred metrics. It becomes a process of observation, testing, and revising, ensuring that every step of your campaign builds stronger connections with your audience.

The key performance indicators (KPIs) you choose depend on your strategy, and your business goals. Some of the essential KPIs include:

Open rates
Measure how well your subject lines capture attention and encourage recipients to open your emails.

Click-through rates
Assess the impact and appeal of your content by tracking response to your calls to action.



Conversion rates

See how many customers complete your journey, whether that means making a purchase or signing up for a service.



You might also look at data on customer retention, sensitivity to offers, and which types of response incentive are the most effective. The numbers that matter to you are the numbers that count above all. These are the topline numbers, showing the basic mechanics of your campaign performance. But Mailchimp’s analytics tools can go a lot deeper.

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Subscriber growth

Track the performance of your list building activity—such as pop-up forms—and see how your audience is expanding.



Campaign ROI

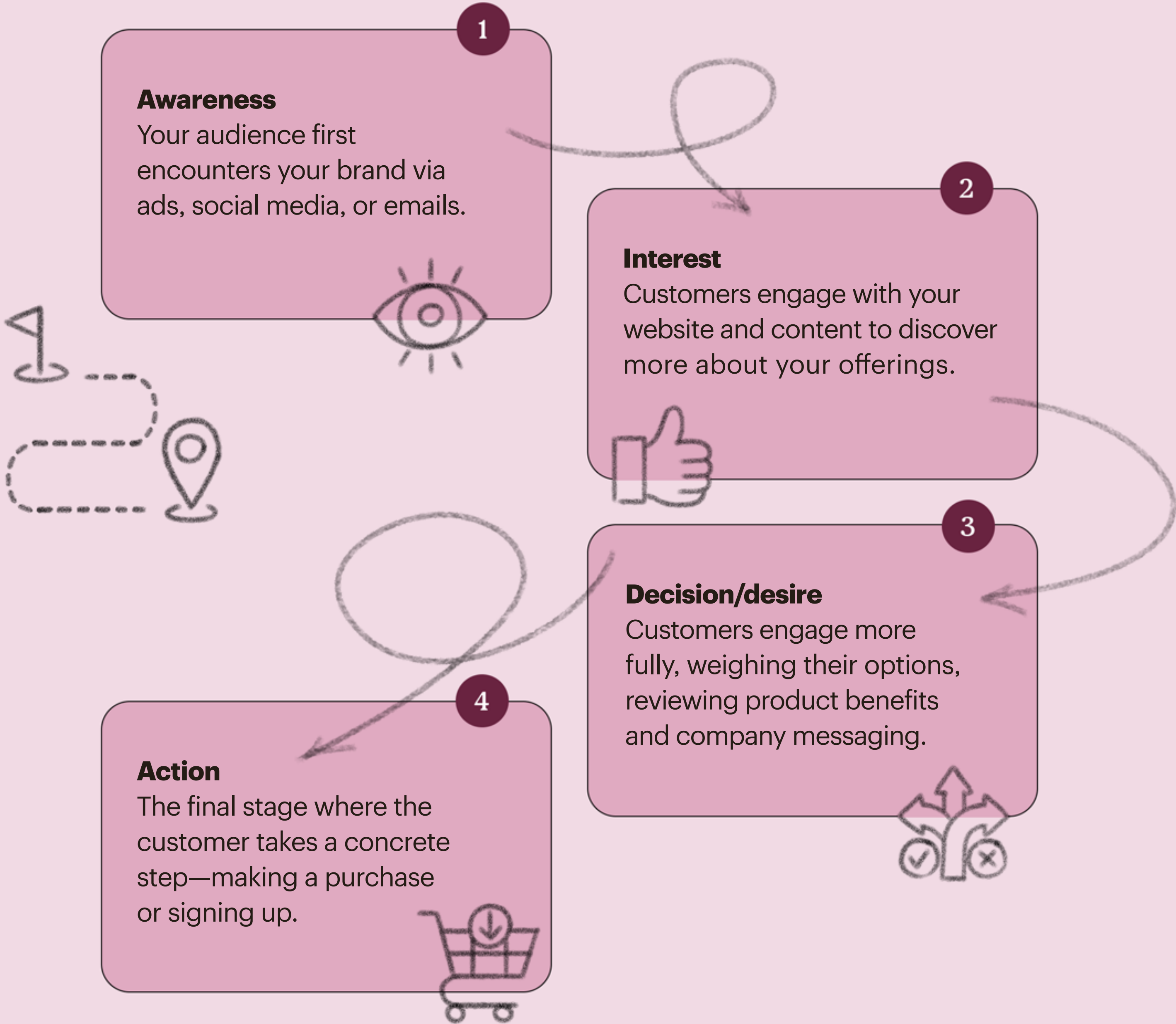
Calculate the return on your marketing investment to see if your campaigns are cost-effective.



Mapping the journey with funnel reporting

You might already be familiar with the classic sales funnel. It's still a powerful tool for planning and analyzing the customer journey.

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Finding and fixing the gaps

This visual insight is invaluable for uncovering bottlenecks. If you notice a significant drop between Interest and Decision, it's a clear indicator that your audience might need a stronger call to action or a more persuasive message. The granular data guides you to focus efforts where they matter most, refining the content and design for each stage of the funnel.

Funnel reporting transforms raw data into a powerful roadmap for your automation strategy, enabling you to build a tighter, more effective customer journey that drives consistent results. And we can go deeper still.

Decoding user behavior

Every user interaction, at every touchpoint, tells you something new. Mailchimp's user behavior analytics can dig deep into how customers interact with your digital content. You can track every click, scroll, and navigation event, and make informed refinements that enhance the user experience and drive higher conversions.

Turning data into direction

Visualizations of click data show you exactly where users are spending time, what draws them in, and which parts of your content need a refresh. Mailchimp's ability to track the way your customers navigate your campaigns and content helps you to understand the natural flow through your digital assets. You can detect points of friction—where users abandon the page or abandon a form—and then address those issues by streamlining paths or adjusting the content.

With the analytics and reporting available to you within Mailchimp, you can replace informed guesswork with sound judgement based on clear intelligence. And you and your automation strategy get smarter with each new campaign.

Automation for the people

We talked about the paradox of marketing automation. How is it that a technology, devoid of emotion, can help you build stronger human relationships with your customers?

In reality, it's not the technology itself that creates those deeper bonds, but the insights it gives you about how your customers behave when you make contact.

The beauty of Mailchimp's marketing automation capabilities is that they unlock a continuous cycle of learning and improvement. The more campaigns you run, the more effective they become.

At the same time, your customers feel the benefit of an ever-more rewarding experience, with messages, offers and opportunities that are more personalized, relevant, and valuable to them.





Tech that works

This is not new technology. Marketing automation has been around for a long time. Yet still we’re seeing a lot of Mailchimp customers who are not taking advantage of the power at their fingertips.

It’s that old axiom: the hardest part of any journey is the first step. But with Mailchimp automation, even that first step is simplified by ready-made workflows and templates, all of them easy to customize to fit your brand and your strategy.

You can start small. Pick an audience segment you know and build a workflow that delivers an offer you know will have strong appeal.

Then watch the results flowing in—who opened, who clicked, who signed up, who opted out, who responded after a follow-up. It’s a living picture of your customers and their relationship with you, with every interaction telling you a little more, and getting you closer to them.

After that, the cost savings and increasing revenues made possible by automation can be extended right across your marketing communications. You’ll wonder how you ever managed without it.

Make your first move now.

[Explore Mailchimp ↗](#)

[Sign up now ↗](#)

This content is for informational purposes only and does not constitute legal advice. For legal questions or concerns, please consult a qualified attorney.

Availability of features and functionality varies by plan type. For details, view plans and pricing.

SMS Marketing: SMS is available as an add-on to paid plans in select countries. Application and agreement to terms is required before purchasing credits. Messages can only be delivered to contacts in the country selected. Australia messaging available only for contacts with +61 country code. SMS credits are added to your account after purchase and approval. Credits are issued monthly and unused credits expire and do not roll over. MMS only available for Standard and Premium plans sending to US and Canada contacts. Pricing varies. Click [here](#) for details.

Popup forms (beta) are available to Mailchimp marketing plan users (on web browsers only) at no additional cost at this time. Availability of features and functionality varies by plan type. For details, view plans and pricing.

Integrations sold separately. Availability of features and functionality varies by plan type. Certain functionality described is dependent upon the integration and/or a paid plan. For details, please view Mailchimp's various plans and pricing.

Learn more

[Reach, engage, and convert more customers](#)

[Convert and drive revenue](#)

[Workflow management: key strategies for success](#)

[What is an automated workflow?](#)

[Demystifying marketing automations](#)

