

#QUICKTIPS

EMAIL
MARKETING
WORKFLOWS
YOU MIGHT
BE MISSING



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01

For New Customers



Marketing should be involved in the Customer Experience strategy from the beginning.

- 1 Set up welcome emails to express appreciation and a celebratory mood.
- 2 Include emails that provide important info, such as what to expect during onboarding, how to find support, etc.
- 3 Provide a virtual intro to relevant members of your team. Individual Account Managers or Customer Service Managers can follow up personally.
- 4 Create a map with your Customer Management team for a seamless post-purchase customer experience to ensure you're not creating overlap in communication.

02 For Existing Customers



Signing a contract or making a purchase doesn't mean the marketing relationship ends there.

- 1 Set up periodic email survey requests to go to customers. Schedule can depend on behavior (ex: engagement with your app/platform) or time (ex: every 6 months).
- 2 Reminders about renewal or anniversary emails to mark the date they became a customer are not required, but absolutely appreciated. Included should also be any data you have around benefits they've enjoyed since becoming a customer.
- 3 Create workflows to provide general helpful info, such as answers to FAQs, tips to get the most ROI from your products or services, and where to find thought leadership content they might like.

03

For Leads & Prospects



Here are some email workflows you could test on prospects in your funnel.

- 1 Activity-based workflows are a great way to make sure you're sending relevant content to prospects when it could be most useful. For example, you could send a related white paper to someone who signs up for an upcoming webinar.
- 2 Got a batch of prospects who have gone cold? Enroll them in a workflow designed to delight and inspire, filled with some of your most popular content or perhaps a special discount code.
- 3 Add questions into forms asking what contacts are most interested in. Then put them into topical workflows to receive targeted messaging based on their answers.



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