

6 marketing automation templates

A toolkit for boosting sales and brand loyalty.



Onboarding automation

Make a great first impression by giving new customers a warm welcome! As soon as they sign up, introduce and bring your brand to life – and tell about member benefits to inspire the first (maybe even the second!) purchase.

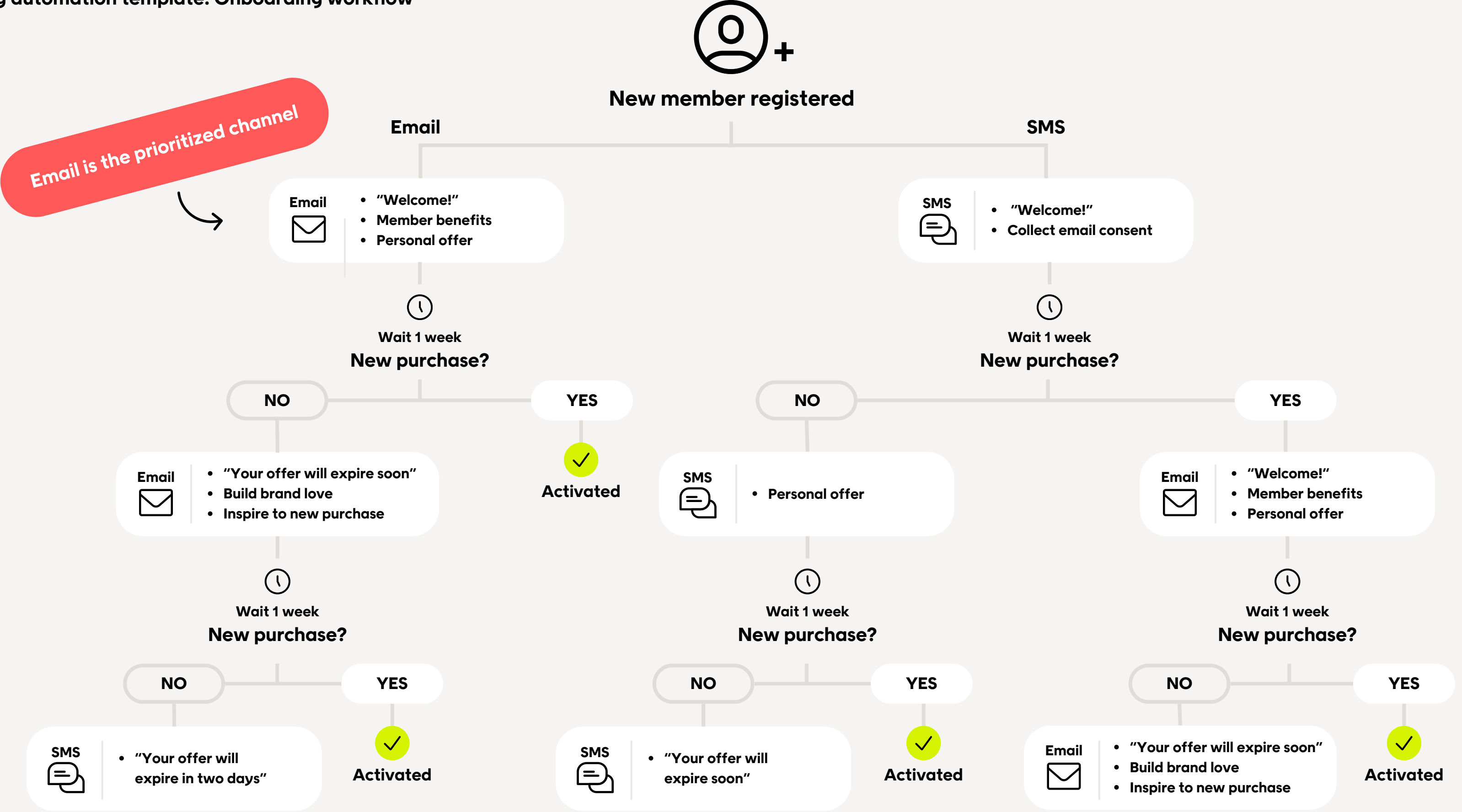
The essential building blocks

- **Purpose:** Onboard and activate new customers.
- **Trigger:** When a new contact signs up.
- **Timing:** Immediately after sign-up.
- **Content:** Welcome message, membership confirmation, and info on member benefits.
- **Offer:** Yes – to motivate a purchase!
- **Follow-up:** New purchase.

Other possibilities:

- **Personalize content:** Segment customers by gender, previous purchase, or sign-up channel.
- **Randomized split:** Run an A/B test to try different content and offers.
- **Labels:** Adding labels allows you to include and exclude customers from other workflows or campaigns. Remember to remove labels when the welcome phase is done.

Marketing automation template: Onboarding workflow



Never-purchased automation

Motivate your customers to make the first purchase! One month has passed since they registered with you – and now they need to be activated. Inspire and build brand awareness in several channels, like email, Facebook ads, and Google paid search.

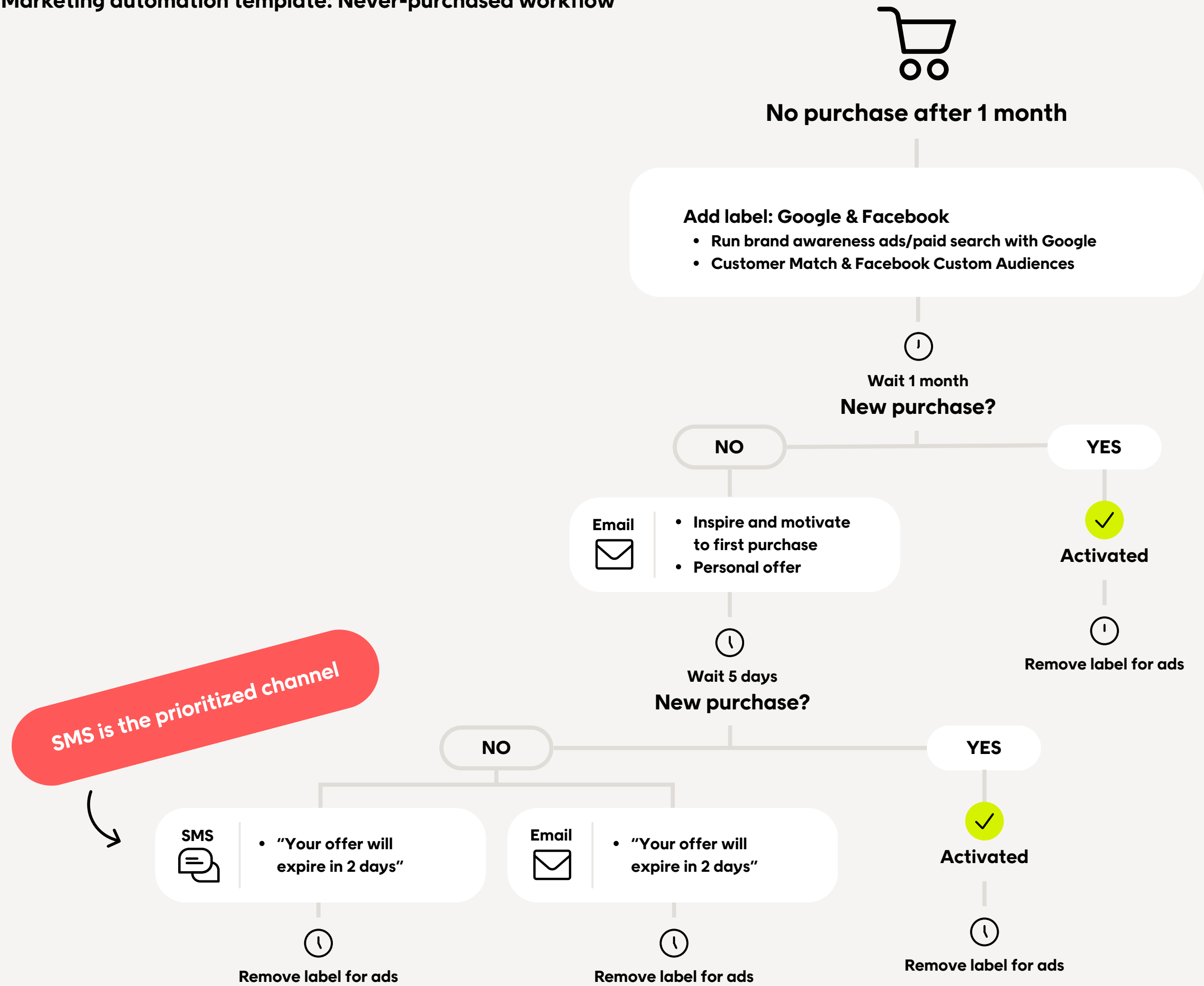
The essential building blocks

- **Purpose:** Inspire and motivate customers who have never shopped to make the first purchase.
- **Trigger:** Scheduled selection.
- **Timing:** One month after sign-up.
- **Content:** Build brand love through email, Google, and Facebook. Prioritize email over SMS to be able to inspire with compelling content. When it's time for a reminder, send a text message to create a sense of urgency.
- **Offer:** Yes – to motivate a purchase!
- **Follow-up:** New purchase and activation.
- **Label:** Create a segment based on a label to synchronize customers to Google and Facebook.

Other possibilities:

- **Personalize content:** Segment customers by gender, previous purchase, or by sign-up channel.
- **Randomized split:** Run an A/B test to try different content and offers.
- **Labels:** Adding labels allows you to include and exclude customers from other workflows or campaigns. Remember to remove labels at the end of the workflow.

Marketing automation template: Never-purchased workflow



Multi-channel automation

Drive additional purchases on a new sales channel. In other words: create multi-channel shoppers! Target your in-store customers with personalized content and offers to make them visit your online store – and vice versa.

The essential building blocks

- **Purpose:** Get customers to purchase through a new channel.
- **Trigger:** Scheduled selection.
- **Timing:** Three months after sign up.
- **Content:** Motivate to visit a physical store or the website/app.
- **Offer:** Only valid in-store or online to widen the purchase behavior.
- **Follow-up:** Increased share of multi-channel customer.

Other possibilities:

- **Personalize content:** Segment customers by gender, previous purchase, or by sign-up channel.
- **Set up a target audience:** Make multi-channel customers a target audience and follow the financial growth over time.
- **Dynamic content:** Personalize content in newsletters and automated emails. For example, show store customers an online module and the other way around. A good idea is to exclude customers that live far away from a physical store.

Marketing automation template: Multichannel workflow



At least one purchase in the first 3 months of being a member - either in-store or online

Online

In-store

Email



- "Visit our store"
- Personal offer

Email



- Benefits with online shopping
- Personal offer



Wait 1 week

New purchase?

NO

YES

Email



- "Your offer will expire soon"
- Personalized content to motivate purchase



Activated



Wait 1 week

New purchase?

NO

YES

SMS



- "Your offer will expire in 2 days"



Activated



Wait 1 day

New purchase?

NO

YES

Email



- "Your offer will expire soon"
- Personalized content to motivate purchase



Activated



Wait 1 week

New purchase?

NO

YES

SMS



- "Your offer will expire in 2 days"



Activated

Birthday automation

Most email inboxes fill up on customers' birthdays – so make sure to stand out! Start the celebration a few days earlier and give your customers a chance to pamper themselves with a personal offer. A great way to keep them happy and make sure they come back.

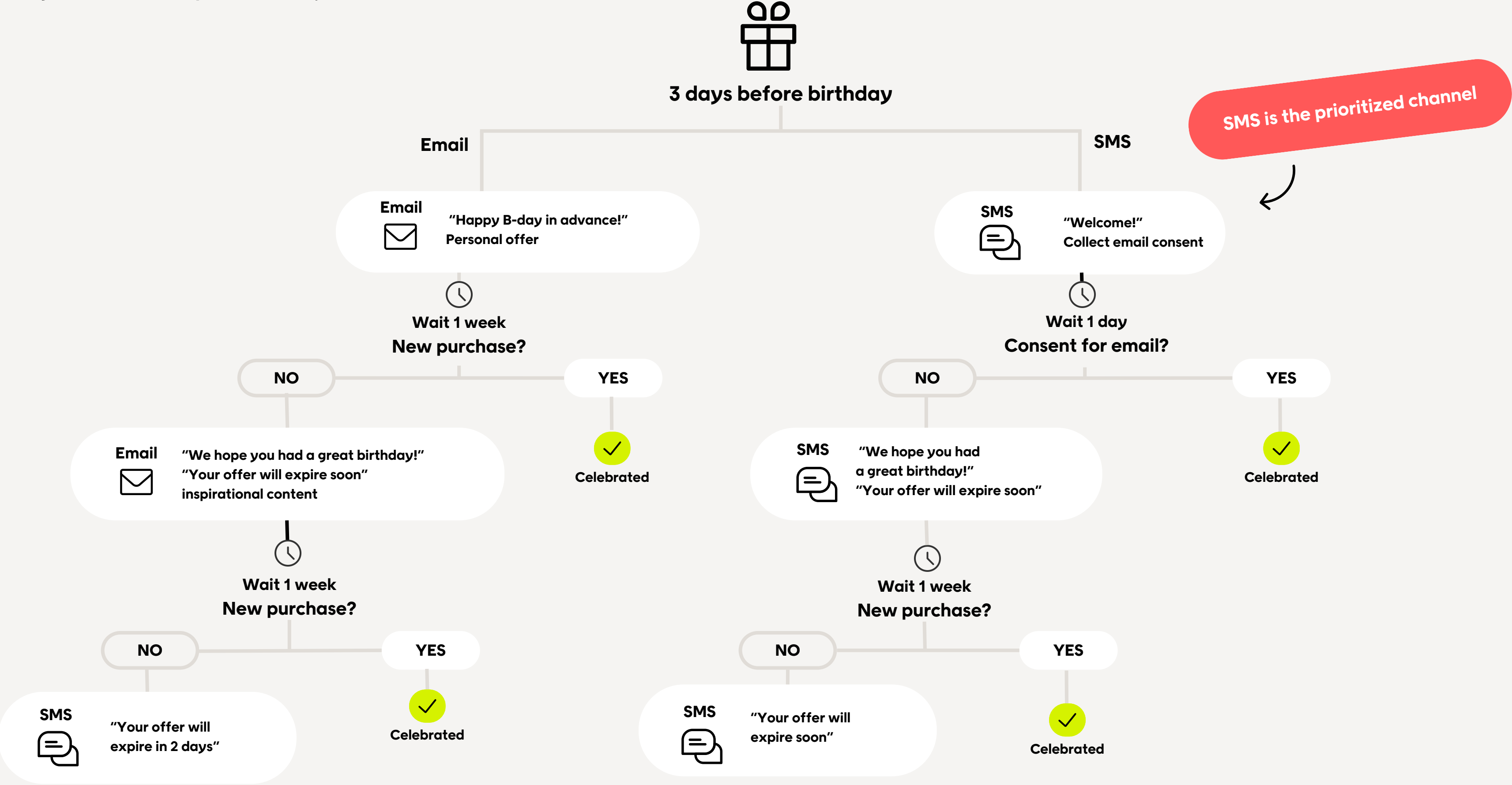
The essential building blocks

- **Purpose:** Pay attention to the customer.
- **Trigger:** Birthday.
- **Timing:** Three days before birthday.
- **Content:** Appreciation and inspiration based on the customer segment.
- **Offer:** Yes, a personal offer!
- **Follow-up:** New purchase and activation.

Other possibilities:

- **Personalize content:** Segment customers by their favorite store – and display product recommendations.
- **Personal offer:** Adjust your offer depending on what segment customers belong to. Reward your best customers with a better offer, for example.

Marketing automation template: Birthday workflow



Post-purchase automation

Show customers who recently bought something a little extra love with personalized and relevant content – like a product care guide or product recommendations. Post-purchase affirmations are a great way to drive additional sales and maintain your customer relationships.

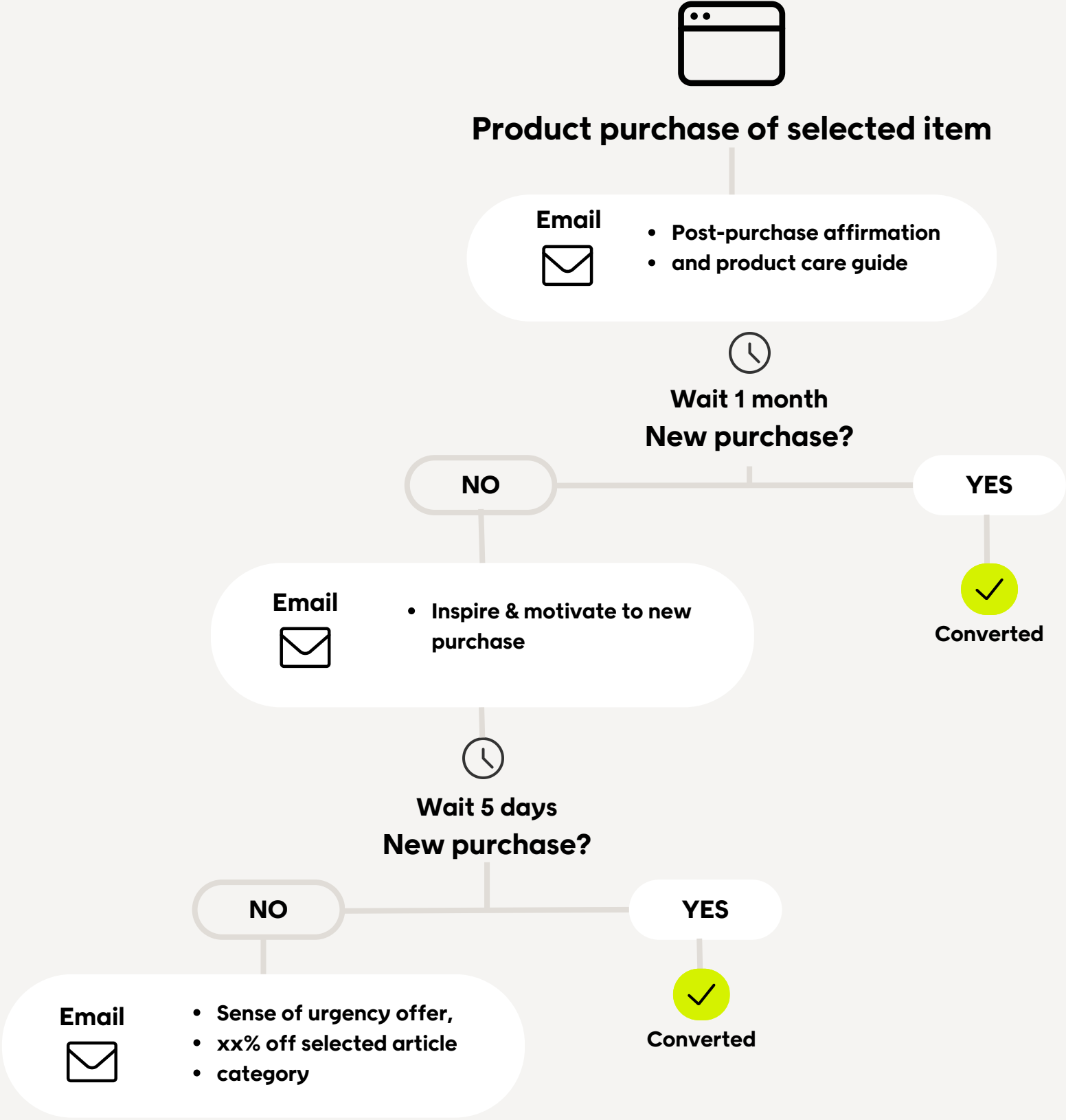
The essential building blocks

- **Purpose:** Drive additional sales.
- **Trigger:** Product purchase.
- **Timing:** After a selected item has been purchased.
- **Content:** Confirm that customers made a good purchase, inspire with take-care guides, and recommend related products to drive additional sales.
- **Offer:** Yes, with short validity – if no purchase has been made after the second email send-out.
- **Exclude:** Remember to exclude customers that already bought a product that you will recommend in this automation.
- **Follow-up:** New purchase.

Other possibilities:

- **Personalize content:** Address customers by the first name, and segment them by gender.
- **Entry condition:** Limit how often the customer can enter this type of automation.

Marketing automation template: Post-purchase workflow



Win-back automation

Reach out to customers who haven't shopped in a long while! By being proactive and sending relevant messages – like product recommendations, affirmations, and personalized offers – you can win them back before they churn.

The essential building blocks

- **Purpose:** Motivate customers to purchase again to activate them before they leave you.
- **Trigger:** Scheduled selection.
- **Timing:** 12 months since the last activity and has been a member for over 12 months.
- **Content:** Inspire your customers to make a new visit and repeat the membership benefits. Create brand awareness across several channels by assigning labels and creating segments – then sync to Google or Facebook.
- **Offer:** Yes, an activation offer!
- **Follow-up:** New purchase.

Other possibilities:

- **Personalize content:** Segment customers by gender and recent behavior.
- **Channels:** Make sure to reach all the inactive members – and prioritize the email channel.
- **Labels:** Adding labels allows you to include and exclude customers from other workflows or campaigns. Remember to remove labels at the end of the workflow.

Marketing automation template: Win-back workflow



No purchase in the last 12 months

Email



- Add label: Google & Facebook
- Run brand awareness ads/paid search with Google
- Customer Match & Facebook Custom Audiences

Email

Email



- "Your offer will expire soon"
- Member benefits
- Inspiration and personal offer

Wait 5 days

New purchase?

NO

YES

Email



- Your offer will expire soon"
- Inspirational content

Wait 1 week

New purchase?

NO

YES

Email



- Your offer will expire in 2 days"

Activated



Remove label for ads

SMS

SMS



- "You are important to us"
- Personal offer

Wait 5 days

New purchase?

NO

YES

SMS



- Your offer will expire soon"

Wait 1 week

New purchase?

NO

YES

SMS



- Your offer will expire in 2 days"

Activated



Remove label for ads

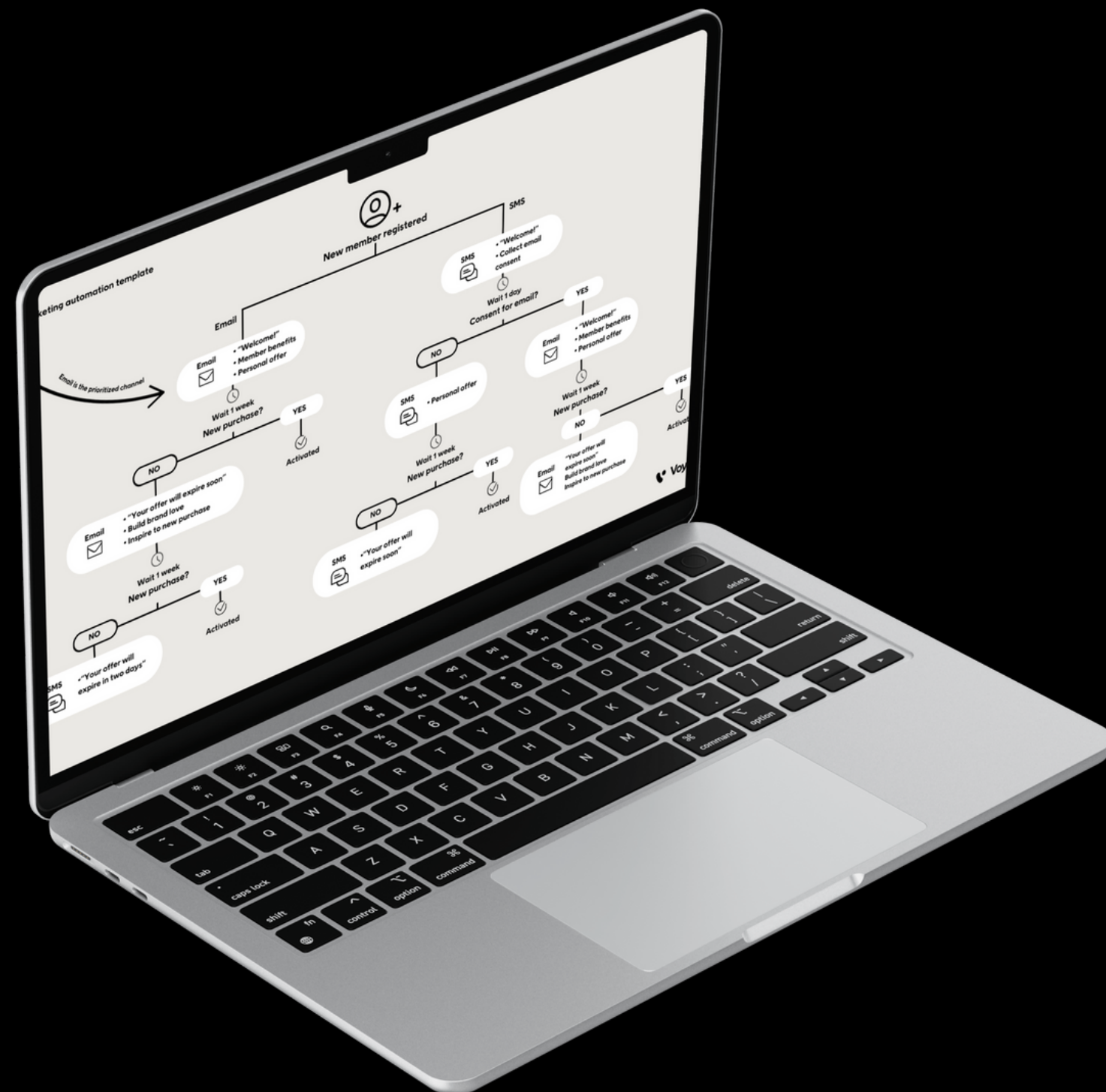


Activated



Remove label for ads





Grow faster with e-commerce marketing automation

With Voyados e-commerce marketing automation, you can create personalized emails and text messages that engage and send themselves. That way, you can grow sales without growing your workload. It's simply a win-win situation!

[Find out more](#)