



*Planning Automated Campaigns*  
**The Marketer's Guide**

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## Introduction

The automation of email marketing has the potential to be an email marketer's best friend. Considerable efficiency and effectiveness can easily be achieved through automating manual (and often cumbersome) tasks, in many cases achieving a better experience for the end recipient.

Unfortunately, the concept of automation conjures up feelings of fear and anxiety for marketers who are not quite sure where to start. In many cases it may seem easier to keep doing things manually rather than risk making a mistake.

However, the reality is, automation really just takes tasks we instinctively know need to be done on a daily basis and puts them into a computer to be done automatically (leaving us more time to duck out for a coffee)!

For example, it seems silly to manually send birthday greetings to various people on your list each day when it can be automated in a single step.

This whitepaper aims to dispel some of that fear and anxiety by providing logical step-by-step instructions on how to prepare your automated campaigns.

## Why should you automate?

As well as saving you time and effort automation can also improve your recipients experience.

Automation can:

- a. Improve timeliness**  
For example when someone registers for an event, rather than having to wait to receive confirmation of their booking, they can be sent the confirmation message automatically.
- b. Improve relevance**  
For example, sending an email to men about the latest range of maternity clothes may not be the best use of your email marketing. Automation allows you to choose which parts of your database (segments) receive which communications.
- c. Reduce the risk of human error**  
Particularly on repetitive tasks, human error becomes almost inevitable – especially when you consider the amount of distractions at any given marketer's desk. In automating a task, you simply need to get it right in the setup and the ongoing maintenance will be executed flawlessly.



## When should you automate?

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Before you start, consciously assess if automation will help you. Whilst it is easy to sing the virtues of automation, there still needs to be the realistic acknowledgement that it does take some time to set up an automated campaign and in some instances it may be better to just run the campaign as a once off.

To determine if an automated campaign will be beneficial to you consider the following three questions – if you answer yes to any of them, you may wish to consider automation for your email marketing:

- a. In the long run, can automating my email marketing save me time and/or effort?
- b. Can automation provide my recipients with a better experience of our brand or products?
- c. Can reporting be improved by implementing a standard set of procedures?

## 5 Steps to preparing your automated campaign

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This whitepaper will take you through five key steps to preparing your campaign for automation:

1. Create a mind map
2. Work out which actions can be automated
3. Create a trigger and action table
4. Work out the sequence and timing
5. Hypothetically run-through your automated sequence

Each of these steps will be outlined in the following pages and includes a practical example to help you understand the process.



## 1. Create a mind map

Start by listing all the known tasks and actions that need to happen. No matter how big or small a task might seem – if it is something you know you need to do, that is directly related to your email marketing campaign, write it down.

No order or logic is needed at this stage – the point of this step is simply to get everything out of your head and onto paper.

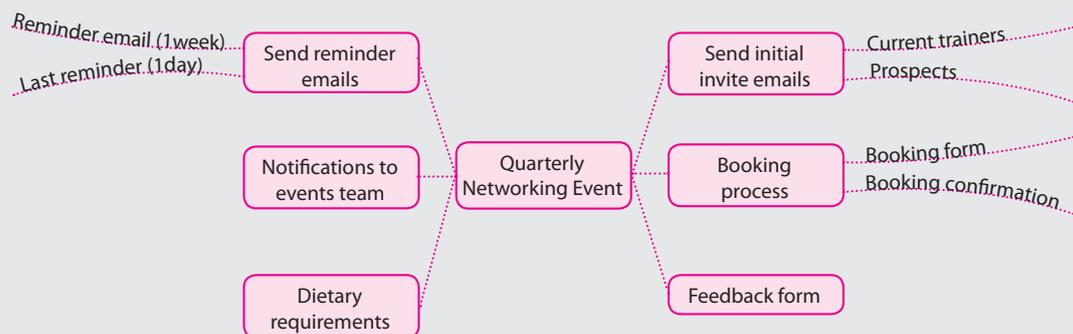
### For Example

Amy runs a personal training business that employs a large number of personal trainers working in a variety of locations.

She holds a quarterly networking event that serves as a chance for her trainers to come together and meet each other and network with prospective new trainers.

Amy knows there is a number of email marketing orientated activities that she needs to do. As such she has written down everything that she can think of that needs to be done.

An example of Amy's mind map is shown below.





## 2. Work out which actions can be automated

The next step is to go through and work out which steps can be automated and which steps are better managed manually.

At this stage, it is important to remain pragmatic and not automate everything just because you can. It is wise to consider that:

- a. some tasks can be done as easily or easier in a manual manner.
- b. at some points in your campaign, there may be steps that are more complicated due to multiple variables, yet they are not frequent tasks. These may be simpler to manage manually rather than setting up the automation to manage it for you.

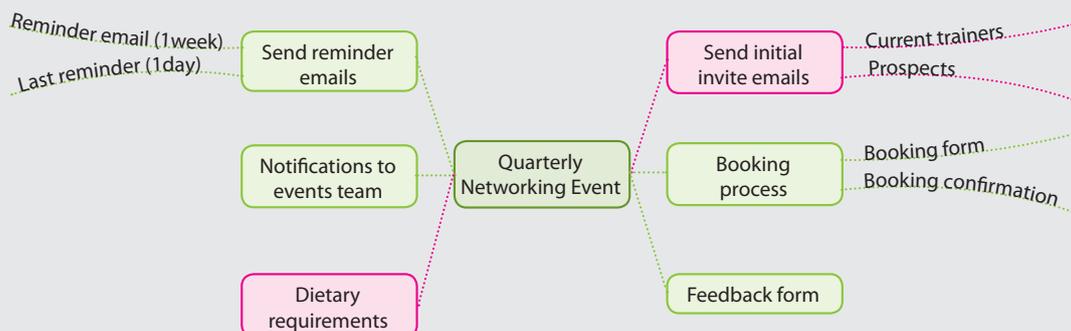
### For Example

Continuing with Amy's event, now that she has done her brain dump, the easiest thing to do is get her coloured markers out and identify which tasks she wishes to automate.

An example of Amy's identification of actions to be automated are shown below.

#### Legend

- Pink** Task that will need to be managed manually.
- Green** Tasks that will be automated.





### 3. Create a trigger and action table

To organise your mind map set up a table and take all the items that you wish to automate and list them into a trigger and action table.

Triggers are generally either:

- a. time based and happen at a specified date and time; or
- b. action based and happen when a subscriber completes an action such as, registering for an event, subscribing or clicking on a link.

Actions are the actual activities that need to take place.

In organising your mind map into the trigger and action table you might realise that there are obvious missing links that can now easily be filled in.

Note: As a time-poor marketer, it can be easy to become overwhelmed with activities and to lose sight of your overall goals and objectives. By creating a cause and effect table you are able to look at your plans in a logical way and ensure you are doing the right things for the right reasons.

#### For Example

Once Amy organised her brain dump into a trigger and action table it looked like this:

Trigger	Action
1. Trainer Registers	Send booking confirmation Notification for events team when people register
2. Week Before Event	Send reminder email – check for cancellations
3. Attendee Cancels	Update database. Send notification to event team
4. Day Before Event	Send reminder text
5. Day After Event	Send feedback form
6. Feedback Received	Send to events team

Legend

Green = information taken from Amy's mind map.

Pink = information added in through the process of drawing up the trigger and action table.



## 4. Work out the sequence and timing

The next step is to organise your trigger and action table into the correct sequential order. At this point, it is valuable to assign your timing to the campaign and identify if you need any less obvious fields in the database.

For example, you may wish to send a birthday greeting at 9am on a contact's birthday, but you may also wish to have another field that auto-populates when the email has been opened. This may require you to have this field set up ready to be automatically populated.

### For Example

Applying sequence and timing to Amy's table let her see that she only has six steps to set up, which are now clearly laid out for her.

Trigger	Action	Timing
1. Trainer Registers	Send booking confirmation. Notification for events team when people register.	Immediately after registration
2. Week Before Event	Send reminder email – check for cancellations	7 days prior to event
3. Attendee Cancels	Update database Send notification to event team	Manual Trigger
4. Day Before Event	Send reminder text	24 hours prior to event
5. Day After Event	Send feedback form with email	10am on the day after event
6. Feedback Received	Send to events team	Automatically when feedback received

#### Legend

Green = information taken from the trigger and action table.

Pink = information added in through the process of sequencing the campaign.



## 5. Hypothetical run-through: Automated sequence

Once you have completed your trigger and action table and organised it into the right sequence, it is important to take time to sit down and walk yourself through the whole process.

As you do this run-through you may have moments of “ah, what about this.” If it is logical, slot in what you remembered and continue. If you are unsure – jot your idea down on the side and work out where it fits in later on.

*At this stage it is important to keep your flow as you run-through and consider the end user experience.*

### For Example

Because Amy is such a conscientious marketer she decided to run through her campaign in three ways to ensure that it was absolutely perfect.

- a. Firstly, she drew a map of how the campaign worked so she could visualise how it would work.
- b. She then explained the campaign and how it would operate to a colleague so that she could be sure it made sense and she had not missed something.
- c. Lastly, she checked that the campaign was able to be implemented by her email marketing system.

## Conclusion

Once you have completed the five steps to preparing your email campaign you can sit back and congratulate yourself for organising such a well sequenced and logical campaign.

Automation might initially be something that invokes fear and anxiety in a marketer, but this does not need to be the case. By breaking down the steps logically, it is not difficult to put what marketers already know into a plan.

The result is a well sequenced and ordered campaign ready to be set up in your email marketing system.



## About Vision<sup>6</sup>

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Vision<sup>6</sup> is an Australian owned and run company. We were founded in 2001 by friends and colleagues Evan Fortune and Mathew Myers.

Together they identified that marketing professionals needed an easier way to create, send and track email messages; and to integrate e-messaging into the marketing mix. As a result the duo formed Vision<sup>6</sup>.

From two guys in a tin-shed (well Mat's living room - close enough) we've grown to become a team of more than 30 developers and professionals.

Today, we are passionate about all things e-messaging. We empower thousands of businesses to achieve great marketing results. And we are always on the lookout for new ways to make our clients happy.

We also contribute to the marketing community by writing whitepapers, providing free training, producing the Email Marketing Metrics Report and organising Australia's only email marketing summit (EMSA).

## Contact Vision<sup>6</sup> for a **FREE 30 DAY TRIAL**

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