

5 Ways to Use Marketing Automation

Practical use cases that drive real results — from welcome flows to win-back campaigns.

01

Welcome Flow

TRIGGER:

New sign-up, first purchase, or account creation

Greet every new contact with a series of automated emails that introduce your brand, build trust, and guide them towards their first action.

2–3× higher open rates than standard campaigns

02

Abandoned Cart Recovery

TRIGGER:

Visitor leaves items in basket without purchasing

Send timely reminders with personalised product details and optional incentives to recover lost revenue automatically.

100–200% conversion increase

03

Lead Nurturing

TRIGGER:

Prospect downloads content, attends a webinar, or fills in a form

Stay top of mind with a drip campaign that adapts to each prospect's engagement, warming them up until they're ready to buy.

Nurtured leads make significantly larger purchases

04

Birthday & Anniversary Emails

TRIGGER:

Customer birthday, membership anniversary, or milestone date

Celebrate your customers with a personalised message and a small reward — building loyalty with minimal effort.

Dramatically higher transaction rates vs. standard emails

05

Re-Engagement Campaign

TRIGGER:

No opens or clicks for 90+ days, or no purchase in months

Win back dormant contacts with a 'we miss you' sequence — and clean your list of those who don't respond.

5–15% of dormant contacts recovered

Your Automation Ideation Worksheet

Map out your own marketing automation ideas. Print it, grab a pen, and start planning.

BEFORE YOU BUILD

Quick-Start Checklist

- What do I want to automate? (e.g. onboarding, cart recovery, re-engagement)
- Who is my target audience for this flow?
- What data do I already have — and what do I still need?
- Which channels will I use? (email, SMS, on-site personalisation)
- How will I measure success? (open rate, conversion, revenue)

Map Your First Three Automation Flows

1	TRIGGER <i>What starts this flow?</i> <hr/>	AUDIENCE <i>Who receives it?</i> <hr/>	SEQUENCE <i>What messages, in what order?</i> <hr/>	GOAL & KPI <i>What does success look like?</i> <hr/>
2	TRIGGER <i>What starts this flow?</i> <hr/>	AUDIENCE <i>Who receives it?</i> <hr/>	SEQUENCE <i>What messages, in what order?</i> <hr/>	GOAL & KPI <i>What does success look like?</i> <hr/>
3	TRIGGER <i>What starts this flow?</i> <hr/>	AUDIENCE <i>Who receives it?</i> <hr/>	SEQUENCE <i>What messages, in what order?</i> <hr/>	GOAL & KPI <i>What does success look like?</i> <hr/>