

Basic automation workflows

Welcome email

Birthday email

Thank you email for event registration

Referral email

Advanced automation workflows

Welcome email

Birthday email

Lead generation

Up and cross-sell

Contest

BASIC AUTOMATION WORKFLOWS

Welcome email

Data source: Website / landing page

Channel: Email

Trigger: New sign up / first purchase



A user subscribed to the newsletter



"Welcome! We're glad to have you with us"

Birthday email

Data source: CRM / ERP / landing page / an Excel export from an external system (e.g. a hotel booking system)

Channel: Email

Trigger: Customer birthday



Check:
Customer's birthday



"Happy Birthday! Open the message and use your gift card 🎁"

BASIC AUTOMATION WORKFLOWS

Thank you email for event registration

Data source: Website / landing page / invitation email

Channel: Email

Trigger: Registration to the event



A user registered to the event



“Thank you for your registration to our event! We can’t wait to meet you 🎉”

Referral email

Data source: CRM / ERP / landing page

Channel: Email, In-App notification

Trigger: Sign up / purchase



A user has subscribed



“Win 100 tokens by inviting a friend with the code NICE10!”

ADVANCED AUTOMATION WORKFLOWS

Welcome email

Data source: Website / landing page

Channel: Email

Trigger: New sign up / first purchase



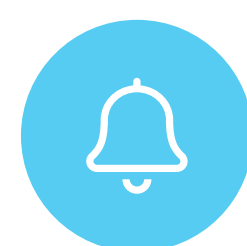
A user subscribed to the newsletter



“Nice to see you’re interested in our content! Pick the most fitting topics for you.”



Add to the segment:
Interested in topic X



Add to the segment:
Interested in topic Y



“Read our newest blog posts about topic X”



“Read our newest blog posts about topic Y”

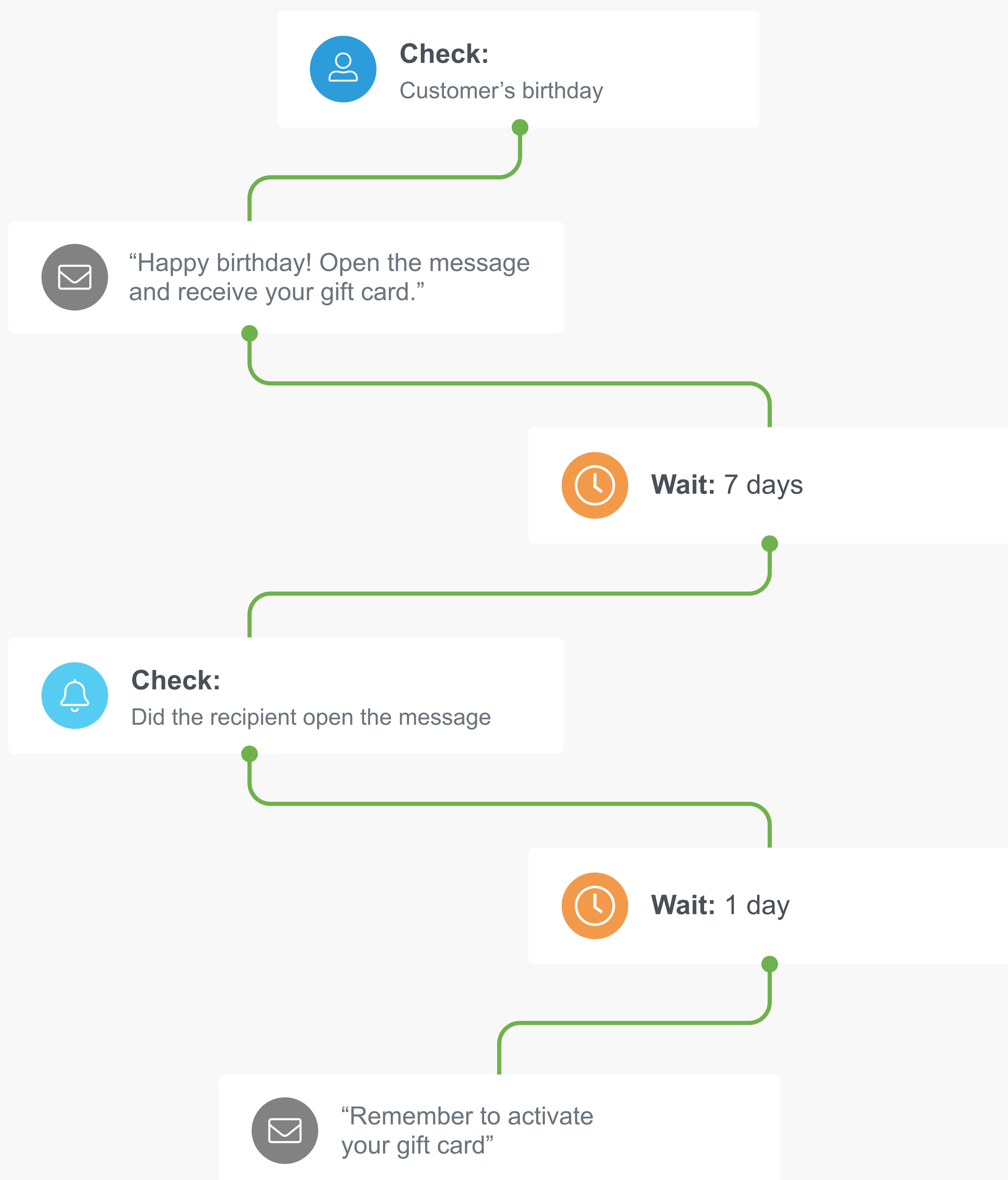
ADVANCED AUTOMATION WORKFLOWS

Birthday email

Data source: CRM / ERP / landing page / an Excel export from an external system (e.g. a hotel booking system)

Channel: Email

Trigger: Customer birthday



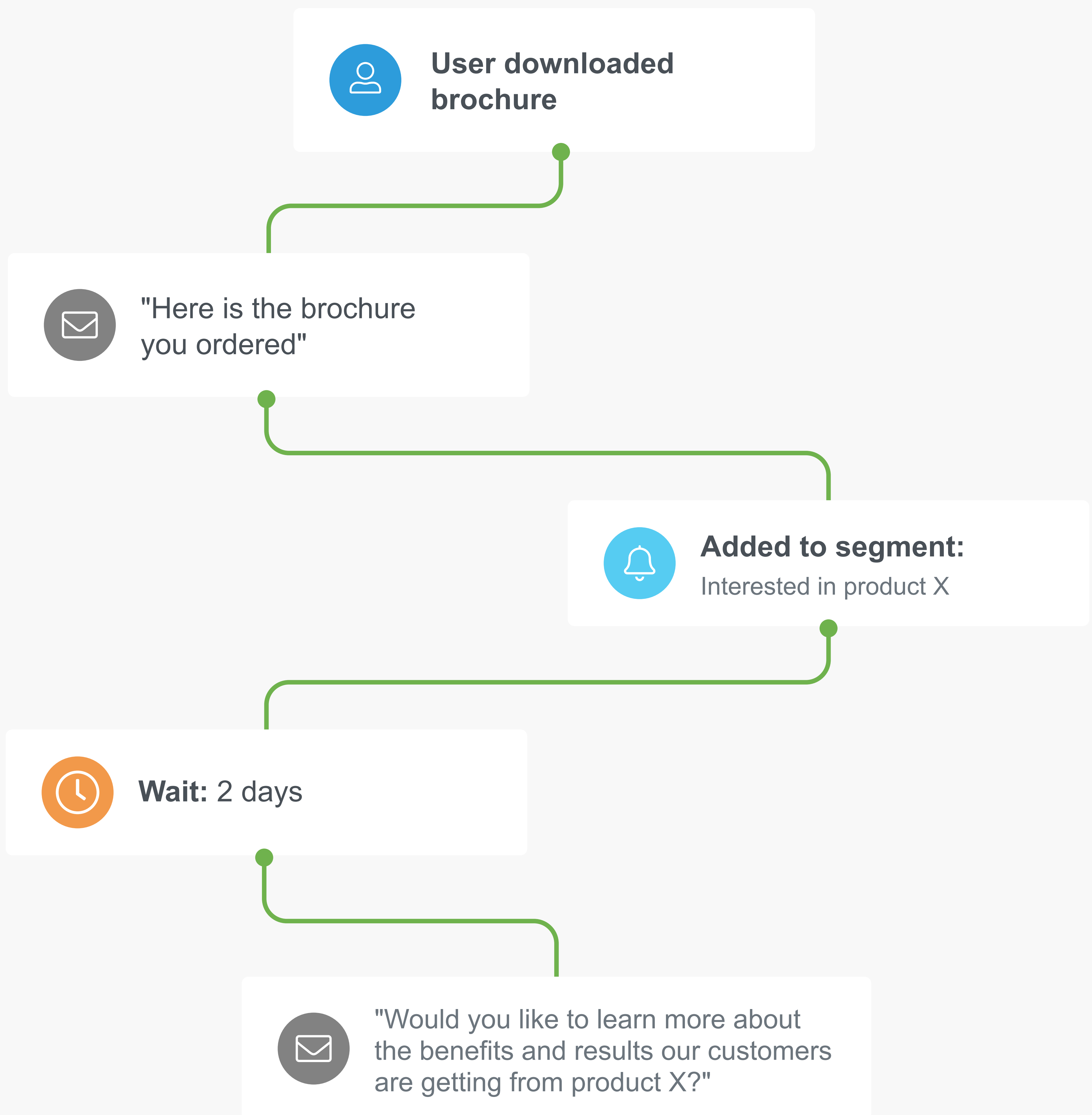
ADVANCED AUTOMATION WORKFLOWS

Lead generation

Data source: Website / landing page

Channel: Email

Trigger: Completed form / Download



ADVANCED AUTOMATION WORKFLOWS

Up and cross-sell

Data source: CRM / ERP

Channel: Email

Trigger: Purchase



ADVANCED AUTOMATION WORKFLOWS

Contest

Data source: Website / landing page

Channel: Email

Trigger: Participation in the contest



The user is in the segment:

Completed the contest form



Waiting: 1 day



"Psst, here's a special offer for all contest participants."



Wait: 7 days



"Did you know that you can also use your gift card for the following X and Y products?"

