

## 8 Marketing Automation Examples & Workflows

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Now that you understand [what marketing automation is](#) and [what goes into building a plan for it](#), let's talk about what it all looks like in action.

In the first post in this series, we said that businesses of any size or resource level can use marketing automation. Here, we'll show you exactly how, with examples of specific workflows for different teams.

### Small marketing team (1-2 people)

If your marketing team is on the small side, you might not have the time to build complex or advanced workflows. **Not to worry – even simple workflows can help you save time and increase conversion rates.** Keep reading to see how:

#### Get back sales that would be lost otherwise

If you're running an ecommerce business, a straightforward [abandoned cart workflow](#) is a great place to start. You can use this to reach out to customers who have added a product to their cart, started the checkout process, and then wandered away for whatever reason.

**This is an easy way to boost your conversion rates.** Think about it: would you rather try and close a sale with a completely cold lead, or someone who already almost finished the checkout process?

You can experiment with different techniques to see which one is the most effective. Maybe sending a discount code will work better for your customers. Or, the email could just remind them of what's in their cart and the benefits of your product. If you'd like some inspiration to get started, Sleeknote has [a roundup of eleven abandoned cart emails](#) with a breakdown of their copy and design.

#### Welcome and engage new leads

No matter what kind of business you're running, you can likely benefit from email marketing. [Building a simple journey](#) makes it easy to welcome new leads onto your list and warm them up for future offers.

If you already send out an email newsletter on a regular basis, you might be wondering if it's a good use of time and energy to set up an email series like this. **The answer is yes – these emails serve a different purpose than your regular promotional or information emails.**

The idea with these onboarding emails is to:

- Orient new people and give them an idea of what kind of email they can expect from you, how often you'll be sending out email, and share a more detailed description of your business's mission/products/etc.
- Share something of value with them (whether it's a downloadable worksheet or ebook, a three part email course, or a discount code) to establish goodwill and create positive associations with your business
- Depending on how salesy the emails are, you may want to use [social proof or other psychology principles](#) to establish that your business is trustworthy and your products are worth buying

## Warm up your cold leads

If you have an existing email list, but haven't been consistent in sending out messages, then [a re-engagement journey](#) may be the way to go. This workflow would also come in handy if, for example, you collected leads at an event six months ago, and then never had the time to put them into your marketing automation tool. The idea is that you reach out to people who are currently cold leads and remind them of who your business is and what kinds of products you sell.

**Re-engaging can be tricky.** You don't want to come on too strong and make people feel like they're being spammed by a newsletter they may not even remember signing up for. It's best to acknowledge that it's been a while since they've heard from you and explain why you're reaching out now. Are you about to have a product launch? Are you gearing up for an event or holiday season? Tell them about it!

As with most marketing communications, the best thing you can do is give them something genuinely helpful and valuable. This is extra important if you're reaching out after a long period of silence. It's a good idea to have a coupon code, a worksheet or other free download, or something else that will endear you to the people you're emailing.

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## Medium marketing team (3-10 employees)

If you have a medium-sized marketing team and/or several seasoned marketing experts on your team, you can start to use the more advanced features. You probably also have a large customer base built up, which means you're ready to use more complex and personalized workflows to engage with your customers and meet their needs.

Here's some starter ideas to get your marketing automation going:

### Creating a cross-channel experience

If you use multimedia content on your website, you can create [a lead-nurturing series](#) that's triggered when someone watches a specific video on your site or in an email series.

This is a great way to get started with [cross-channel marketing](#) and customizing the marketing experience your leads have on different channels.

The one thing to keep in mind is that follow-up sequence is only triggered if you already have the lead in your database. That said, it's still a great way to tailor content and boost engagement for the leads you do have. You could even create a different follow-up series for different videos.

One way of implementing this strategy might look like:

- Collecting emails through opt-in forms on your homepage, about page, blog, etc. and putting them on a general lead list
- That list gets a follow-up sequence of three emails, which have links to videos in them
- People who watch video 1, but not videos 2 and 3, get a different follow-up sequence than people who watch 1 & 2, but not 3, or people who watch all three emails

**You could segment and change the follow-up sequence based on their activity and engagement.** For example, people who watch all three videos, all the way to the end could be tagged with "warm leads," or given a lead score that indicates they're very engaged.

You could also change the follow-up sequence based on the topic of the content they engaged with. For example, leads who engaged with videos about managing large teams might be a good fit for enterprise-level products. In fact, there's no reason you can't combine the engagement level *and* the type of content they're engaging with. That way, you're continuing to engage your warm leads with the content that's the most relevant to them.

## Make your most engaged leads even more engaged

Usually, leads that have engaged with your content are more likely to convert to customers. Identifying those leads and adjusting the content they receive lets you target your follow-up emails more effectively. One way to approach this is by assigning a lead score that will change as the lead either engages with or ignores follow-up emails. ([Check out an example workflow here.](#))

As their lead score goes up or down, you can adjust the follow-up flow accordingly. For example, if someone opens emails one and two in a follow-up series, but doesn't open email three, you can re-send email three in two weeks. If they don't open or click on that email, you can move them from the lead-scoring journey to [a re-engagement journey](#).

**Depending on the amount of products you're marketing, you could also use lead activity to qualify leads for certain products or tiers of products.** Let's say you have a lead nurturing series that consists of ten emails. Emails 1-5 are focused on the more entry-level features of your product. Emails 6-10 then move on to more advanced features, or features that would be most useful for enterprise teams.

In this example, if a lead opens and/or clicks on links in the first five emails, but stops engaging after that, they might not be interested in or have a use for the more advanced features. However, you may be able to interest them in a separate tier or version of the product. You can create a follow-up sequence for those leads that focuses on those features to see if they're more interested in that feature-set, or just a generally un-engaged lead.

## Use data to get better marketing results

At this stage of business, you likely have enough leads in your database that you can make use of [automated A/B testing](#). The idea here is to send two different versions of an email. For example, you're experimenting with personalization and want to see if it's more effective in the subject line or the body of the email.

The automation will send the two different versions of the email to a small segment of your list, and then send the winning email to the rest of your list. It's a great way to improve your marketing results over time by using data.

## Large marketing team (10+ people)

When you have a large marketing team and ample resources you can dedicate to marketing, the sky is the limit. Marketing automation is useful for any size of team, but it's an especially great way to engage a large customer database.

Analytics experts can dig into the data and create segmented customer databases based on any

number of traits. That frees up the marketing team to craft a tailored content experience for leads and customers. Even if your organization has a dedicated sales team to engage with customers, marketing automation can still provide a lot of return on investment.

Here are some examples of how to get started:

## **Make the most of event leads**

When it comes to event marketing, following up with event leads in a timely manner, in a way that's tailored to the event they attended, is crucial.

By setting up a [marketing automation workflow for people who signed up for the event](#), you can increase engagement at every stage of the process:

- To build enthusiasm before the event, you can send promotional content to everyone who signed up, reminding them about what you have planned.
- To promote engagement after the event, you can add attendees to a follow-up sequence that sends discounts on your products/services.
- You can even set up a dedicated campaign for people who signed up but didn't attend, encouraging them to join for future events or offering them video recordings of what they missed.

By customizing your follow-up flows based on activity and attendance, your campaigns will be more effective in converting event leads into paying customers.

If your organization does more digital events than physical ones, a [similar workflow for webinars](#) might do the trick.

## **Efficiently score & nurture leads**

For marketing teams that are working closely with sales, an [advanced CRM-based lead-nurturing workflow](#) could be just the ticket. With this, you can assign scores to leads as they move through the workflow. It can also create tasks in a CRM based on what actions they take and what their lead score is. Armed with this knowledge, the sales team can focus on the most engaged leads and close more deals.

**Identifying loyal customers and customers who are likely to become repeat customers is a huge profit-center for any business.** Marketing automation can help here, too. [A loyalty-building workflow](#) can create scores and tags for leads in your database and assign them based on activity. After leads move through this type of journey, they'll be assigned both:

- A lead score

- A tag of "active," "loyal," or "unresponsive," based on their activity

From here, you can create even *more* customized follow-up sequences. Try creating workflows based on the combination of their customer tags, their lead score, or other user data you have about them.

## Is my business ready?

Yes. Even with a small marketing team on a shoestring budget, you can implement some of these tactics today. The beauty of marketing automation is that you can always expand your efforts and build on what you've done before. The data you've collected will only become more useful as you move forward and your team grows.

**Marketing automation is a great way to close more sales, market your business more efficiently, and keep your leads engaged, but don't feel like you have to dive into everything at once.** Getting started with small steps is better than waiting until you can launch the perfect cross-channel strategy.

Our hope is that these examples will help you explore your options. Now, you can meet with your team and start matching your goals to new ways to genuinely interact with your subscriber base. And if you want to explore more workflow options, be sure to check out [the entire library of MarketingHub automations](#).