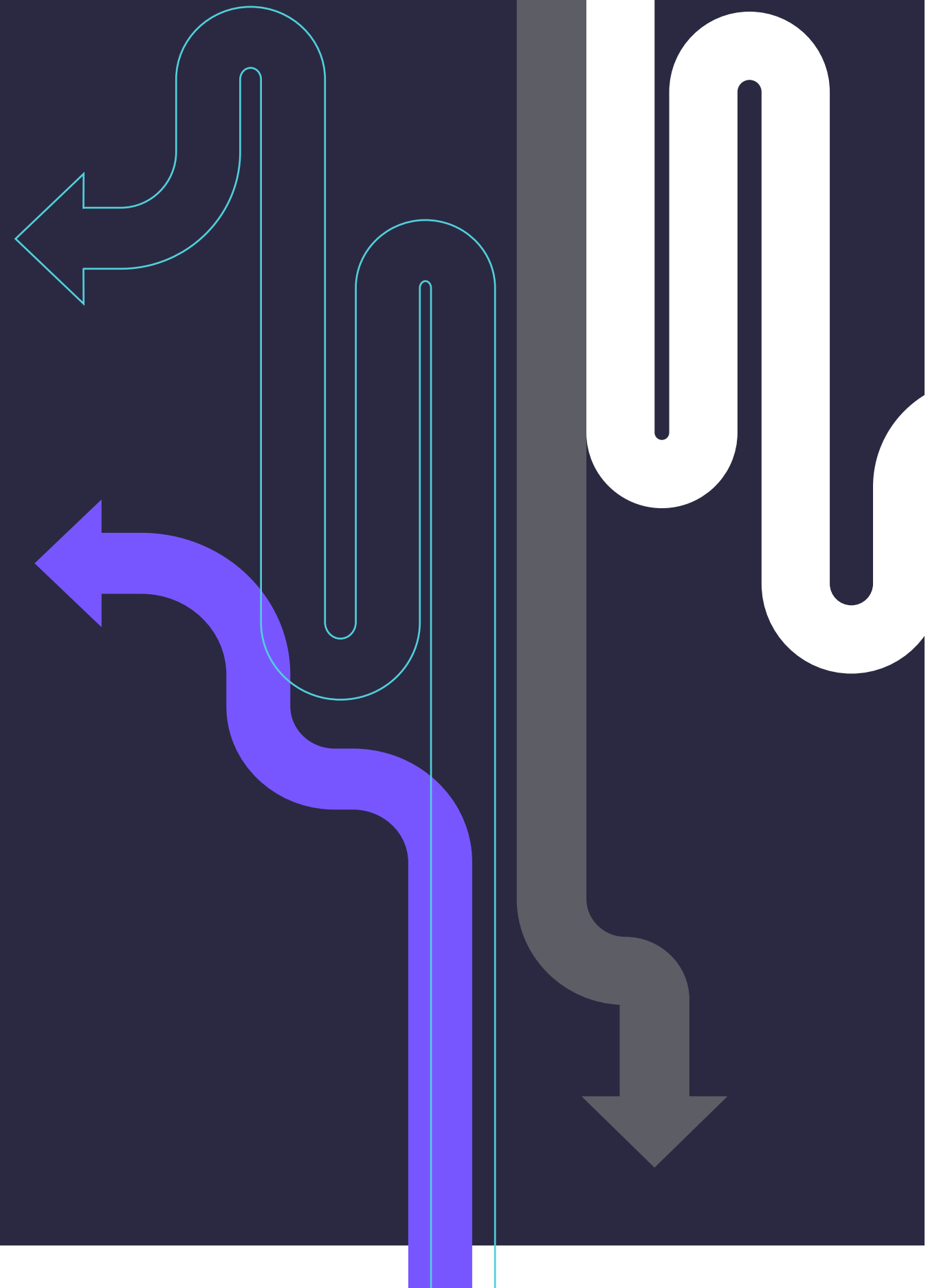
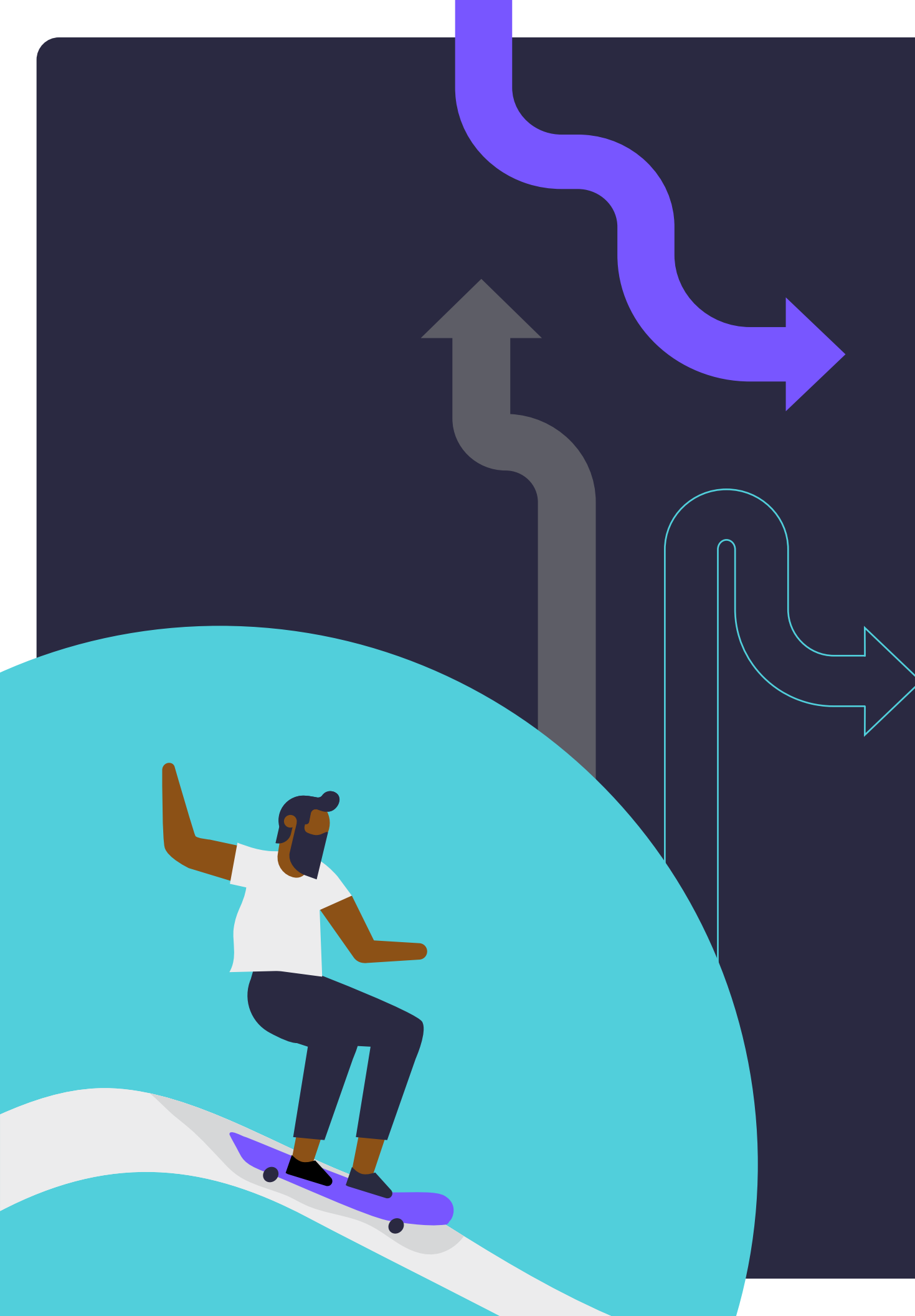


# The B2C Email Automation Recipe Book





## Anyone can create successful email automations

If you downloaded this book, you're likely already hungry to set up automated email flows. That's great news. It means you're ready to take your email marketing to the next level. Unlike one-off email campaigns, which send out the same emails to everyone on your list, automated emails only send after a customer action triggers them. This interactive component makes individuals feel you're paying attention to their needs rather than just sending out huge email blasts.

Automations are worth taking the time to set up. Our internal data shows that **automated emails create 320% more revenue** than non-automated ones.

Email automations work like recipes because when you combine multiple ingredients (individual emails) into one whole (a journey triggered by customer actions), the result is more than the sum of its parts. Automation is the secret sauce that makes your marketing messages match your customer's actions and provides a truly personalized experience.

This book will walk you through 5 must-have automation journeys for any small business. Creating these automated journeys will help you:

- Engage your audience
- Win new customers
- Retain existing customers
- Drive repeat purchases
- Gather customer feedback

We'll guide you through the objectives behind each journey, examples of how you might trigger and build them, as well as some sample copy to help bring them to life.

Let's get started.



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# Chapter One **01**

## Win over new customers

Your initial communications set the tone for your relationship with your customers. Providing a good experience is key: **73% of consumers** consider their experience with a company when making purchasing decisions. Email automation helps you standardize your introductory process without sacrificing personalization.

Lack of trust and unfriendly service are two of the top three things that cause consumers to leave a brand.

In some cases, your first email will be a brand introduction to someone who may become a customer someday. In others, you'll be cementing your relationship after an initial purchase. This chapter provides a welcome journey example that shares the value of your offerings, gains the trust of your audience, and entices that all important first purchase.





# The Welcome Journey



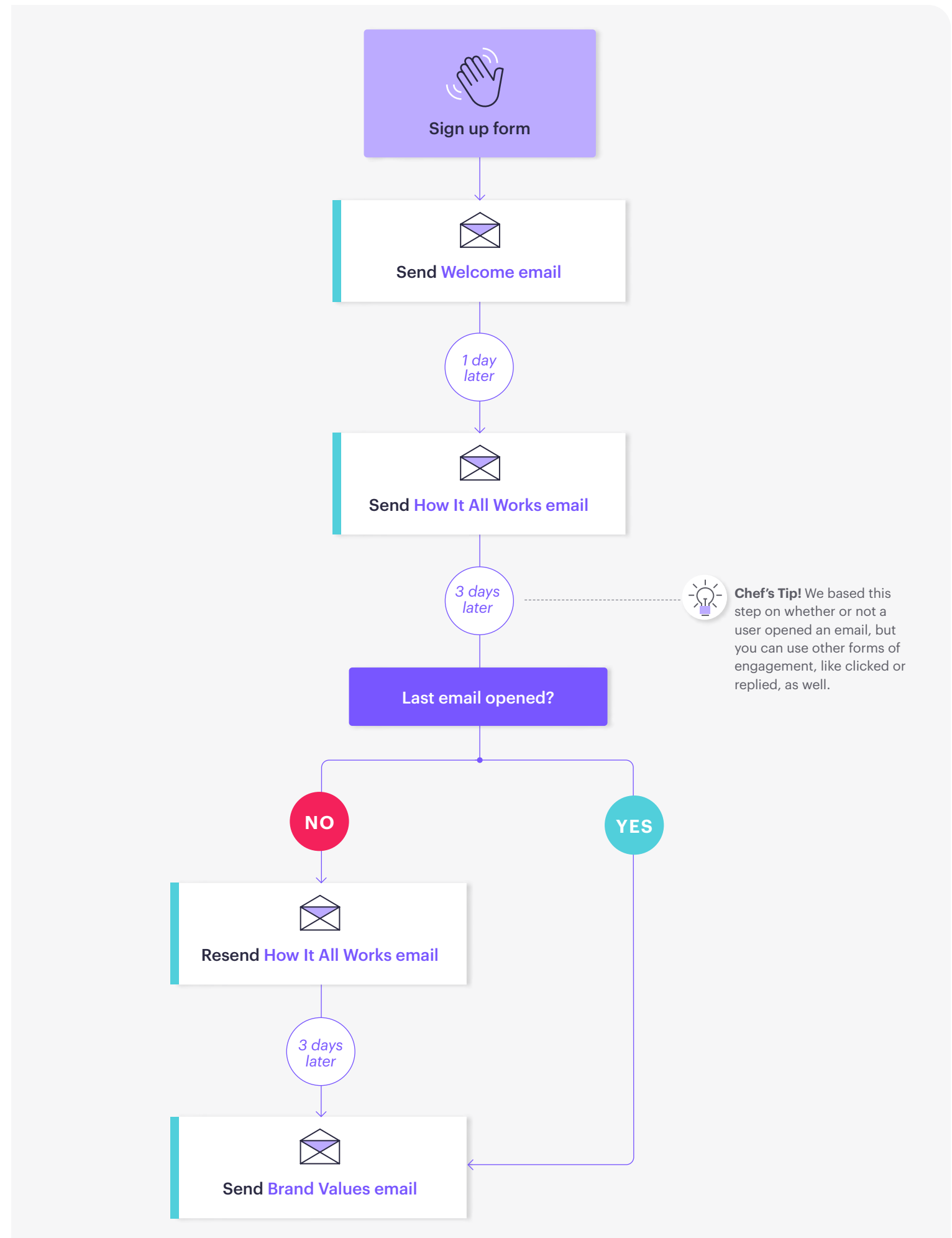
Start your correspondence off right with a series of welcome emails. Sending just one message isn't enough to solidify a subscriber relationship. You need to prove your value right off the bat.

This three-step recipe should only take about a week to complete. We've included examples of each step for a fictional company named Magic Moments, an eco-friendly online photo printing company.

**FOR:** New Customers

**TRIGGER:** Someone signs up for your email list

**LENGTH:** 5-8 Days



## STEP 1

# The welcome email

DAY 01

VOICE & TONE **Casual, straightforward**

Your welcome message should send immediately after someone signs up for your list. A prospect who submits their information is interested in learning more about you — don't lose them with a slow response. *The message should:*

- Thank readers for subscribing
- Offer something to your audience, whether it's a free download, a coupon code, or links to valuable content you've published previously
- Use a call to action (CTA) that prompts further interaction

Here's how Magic Moments might welcome people who shared their email in response to a lead magnet.

### Content Example

**Subject:** Welcome to Magic Moments ✨

Welcome to Magic Moments — we're delighted you're here.

Save 10% off your first Magic Moments order! To redeem your offer, use the code MADEFORMAGIC at checkout.

<<Shop now>>

P.S. Make sure you add us to your address book, so our future emails don't end up in spam.





## STEP 2

# The explainer email

DAY 02

VOICE & TONE First-person, personal

Your explainer email is a 101-level overview of your brand and company. *It should:*

- Give an overview of your product and services
- Identify your target audience
- Set you apart as the best choice
- Include a CTA that encourages further engagement

Don't burden your reader with a wall of information. All you need is one or two sentences on each topic. Your goal is to convince your reader what you offer matches what they need.

In the following example, Magic Moments establishes its authority by telling you how they make their prints eco-friendly.

## Content Example

**Subject:** From picture to print: how our process works

Hi {Name},

Aidan here, the CEO and co-founder of Magic Moments. On behalf of the whole team, I'd like to thank you for joining our community.

As an eco-conscious company, we believe in bringing these memories to life in a way that's kind on the planet. How do we do that, exactly?

100% recycled paper: Our material is thoughtfully sourced and 100% recycled

Reducing waste: Our all-digital, color-managed workflow eliminates the need for wasteful proofing

Eco-friendly shipping: All of our shipping materials are compostable and biodegradable

If you'd like to learn more about who we are, and what makes our prints eco-friendly, you can learn more about our production process here. Or, if you have any questions, feel free to reply to this email, and our customer support team will be in touch.

Thanks again,  
Aidan S., CEO and Co-founder at Magic Moments

<<Shop now>>

## STEP 3

# The social proof email

DAY 05

VOICE & TONE **First-person, personal**

In step 3, you'll build on what you wrote in your previous emails to differentiate your brand and show you care about the same things as your audience:

- Reiterate your brand story to foster an emotional connection
- Share social proof of customers who have enjoyed your product
- End with a CTA that encourages further engagement

Magic Moments' brand values email appeals to eco-conscious customers who are willing to choose a brand that stands with their values on the environment.

## Content Example

**Subject:** Sustainably produced, made to last 🌱

Hi {Name},

At Magic Moments, our mission is to help people celebrate life's biggest moments by turning them into artwork that is beautiful, timeless and kind to the planet. And we're overjoyed by the number of people who have decided to join us on this mission. Here's what people have been saying about their Magic Moment prints.

"The products are so well-made. The design really elevates your photos into something more beautiful."

- Mindy, Florida

"This was the perfect gift for my partner! Excited to order more prints as our family grows. Love knowing that our prints are made responsibly."

- Jessica, Michigan

"I was completely blown away by the quality of the large format photos I received from Magic Moments. Both the quality and the quick turnaround time exceeded every expectation I had. I would highly recommend this company to others."

- Lyle, Washington

Ready to make your own magic? Don't forget to save 10% off your first Magic Moments order. To redeem your offer, use the code MADEFORMAGIC at checkout.

Let's make some magic,

Aiden S.  
CEO and co-founder, Magic Moments







## Chapter Two **02**

### Personalized promotions

Segmentation can only do so much to personalize drip campaigns and other mass emails. Set up email automations based on customer actions and data to provide a truly unique purchasing experience. More than 75% of consumers get frustrated by impersonal interactions, while 78% say they're more likely to make another purchase from companies that offer personalized services.

This chapter covers how to leverage data points to personalize email journeys that retain customers and increase repeat purchases.





# The Birthday Email Journey



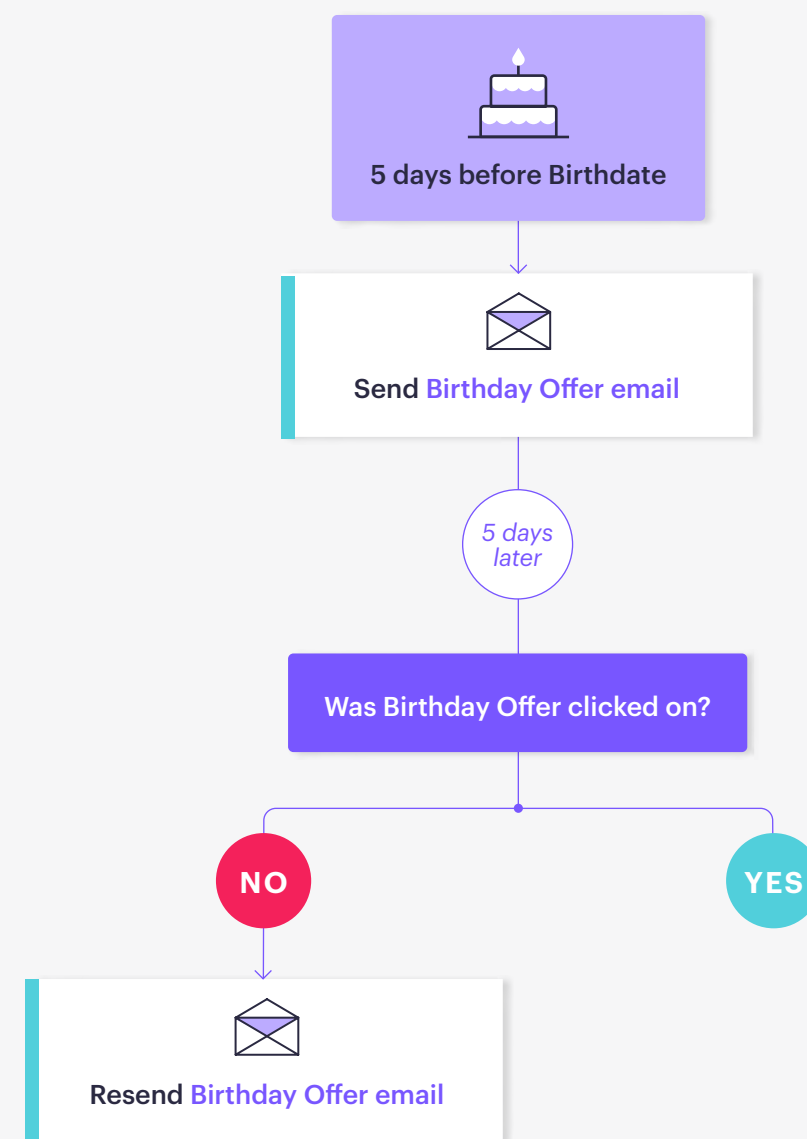
Everyone loves a birthday present. Celebrate your loyal customers and increase sales by sending a special, once-a-year offer. Frequent customers will love feeling remembered, and lapsed customers may become interested again if the offer is good enough.

This email journey is short — only three days at its longest. We created an example journey using the fictional mechanic Miller Automotive.

**FOR:** Email list members who have shared their date of birth with you

**TRIGGER:** Someone's birthday is approaching

**LENGTH:** 1-3 Days





## STEP 1

# The birthday offer email

DAY 01

VOICE & TONE First-person, personal

Keep your message short and sweet to maximize its chances of converting a sale. *You only need to:*

- Provide birthday wishes
- Share the offer
- Add a CTA to help your reader redeem it

Here's how Miller Automotive makes it work.

### Content Example

**Subject 1:** We hear your special day is coming up

Happy (early) birthday, {Name}!

Let us give you the gift of peace of mind with a free multi-point inspection when you bring your car in for an oil change.

Claim your gift by showing us this email or using code BDAY when making an appointment online.

<< Book Your Appointment >>

## STEP 2

# Resend the birthday offer email\*

DAY 03

VOICE & TONE First-person, personal

There's no need to change the copy of your birthday email if it wasn't opened, but you may want to change the subject to signal that you're sending it again.

Miller Automotive's second subject line makes it clear the reader will benefit from opening the email — and may lose out if they ignore it.

### Content Example

**Subject 1:** Don't miss your birthday offer!

Happy (early) birthday, {Name}!

Let us give you the gift of peace of mind with a free multi-point inspection when you bring your car in for an oil change.

Claim your gift by showing us this email or using code BDAY when making an appointment online.

<< Book Your Appointment >>

\*only if necessary



# The Re-engagement Journey



A customer who stops interacting with your brand isn't a lost cause. You may be able to win them back with targeted messaging and offers.

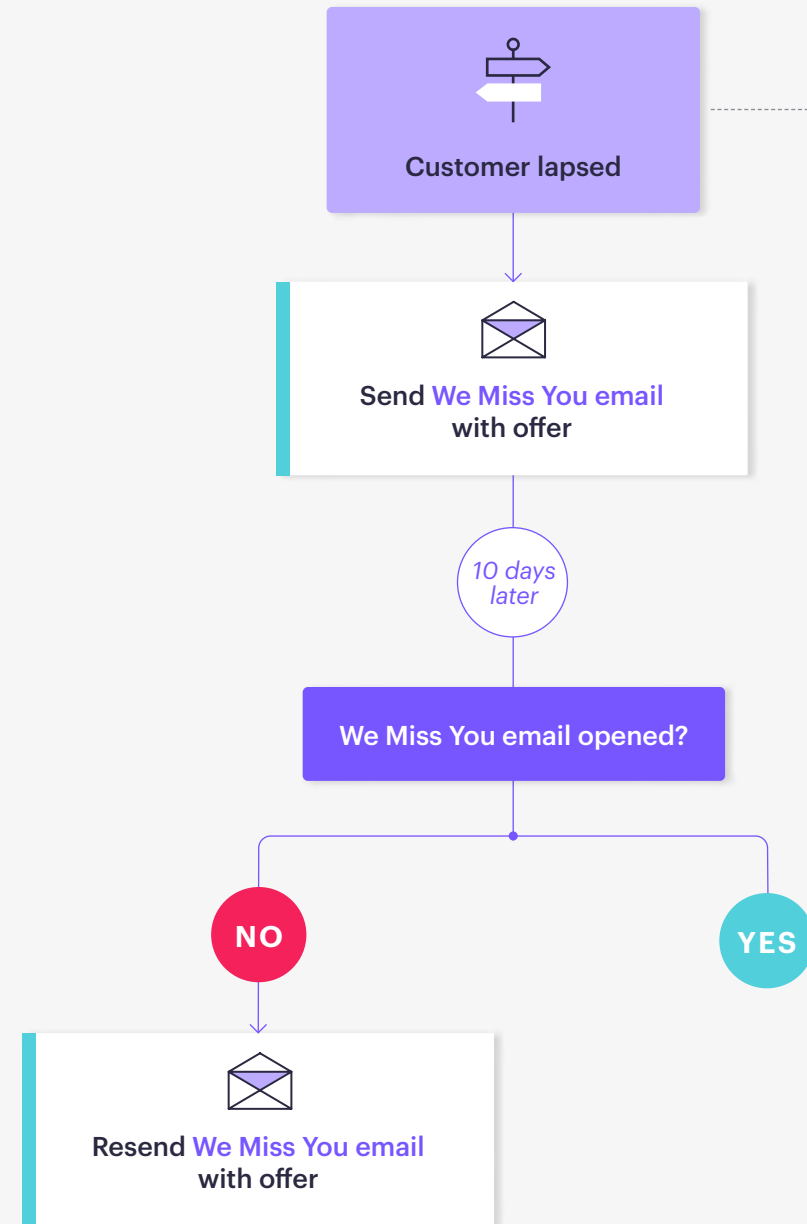
The consumer actions you track, and how often you expect them, will vary based on business type and model. Tailor your campaign to encourage readers to take the action you're tracking.

This journey isn't complex, but it can increase profits by prompting customers to engage with or purchase from you again. Our example this time uses the fictional dental practice Fresh Smiles DDS.

**FOR:** Lapsed customers

**TRIGGER:** It's been a while since someone opened an email or purchased an item from your company

**LENGTH:** Variable



**Chef's tip!** To kick off this journey, we recommend setting up a "disengaged" segment in your ESP for contacts who haven't opened an email or purchased an item in 6-12 months.

## STEP 1

# The we miss you email with offer

DAY **Varies**

VOICE & TONE **First-person, personal**

A customer who stops opening your regular emails won't be won over by more of the same. A good re-engagement email:

- Reminds customers of your value proposition
- Offers an incentive
- Drives action with a CTA

Companies may also use this sequence to update customers on new developments or give them a chance to opt out of some (or all) marketing emails. The content of a re-engagement email depends heavily on the action your campaign is targeting.

For Fresh Smiles DDS, it's about getting someone to schedule a visit.

### Content Example

**Subject 1:** Do you miss that clean teeth feeling?

Hey {Name},

We sure miss seeing you!

Our records show your last appointment with Fresh Smiles was in {Appointment-Month-Year}. But most dentists recommend you get your teeth cleaned every six months to avoid cavities (and more visits to our office).

Don't let your teeth down. Schedule a cleaning today, and we'll add in a free fluoride treatment!

<<Schedule an Appointment>>

See you soon!

Richard Raubs, DDS





## STEP 2

# Resend the we miss you email with offer\*

DAY **Varies**

VOICE & TONE **First-person, personal**

Some marketers believe your second re-engagement email should include an even better offer — but if your reader didn't open the first, there's no reason to increase the stakes. Instead, try a different subject line that emphasizes your offer.

Here's how that looks for Fresh Smiles DDS.

### Content Example

**Subject 1:** Come in for your free fluoride treatment!

Hey {Name},

We sure miss seeing you!

Our records show your last appointment with Fresh Smiles was in {Appointment-Month-Year}. But most dentists recommend you get your teeth cleaned every six months to avoid cavities (and more visits to our office).

Don't let your teeth down. Schedule a cleaning today, and we'll add in a free fluoride treatment!

<<Schedule an Appointment>>

See you soon!

Richard Raubs, DDS

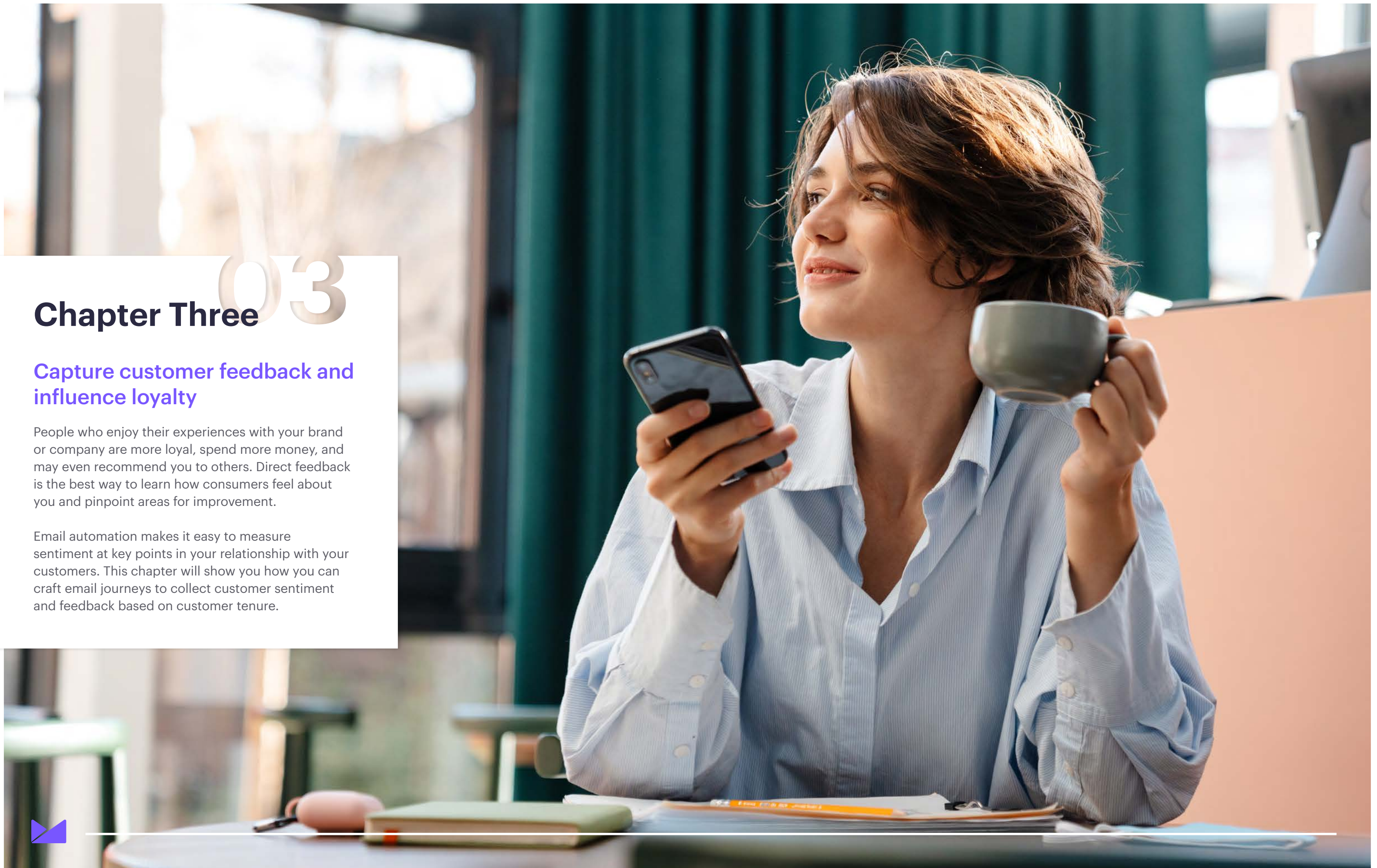
\*only if necessary

# 03 Chapter Three

## Capture customer feedback and influence loyalty

People who enjoy their experiences with your brand or company are more loyal, spend more money, and may even recommend you to others. Direct feedback is the best way to learn how consumers feel about you and pinpoint areas for improvement.

Email automation makes it easy to measure sentiment at key points in your relationship with your customers. This chapter will show you how you can craft email journeys to collect customer sentiment and feedback based on customer tenure.





# The Customer Feedback Journey



Customers are the best people to provide feedback to help influence the direction of your business, whether this be the type of products you sell, to the marketing material you send, or the customer service you provide. You name it, your customers can help influence what you do more or less of.

In this automated journey, we recommend you do a pulse check on customers who have been with you for 3 months, as it's enough time to provide

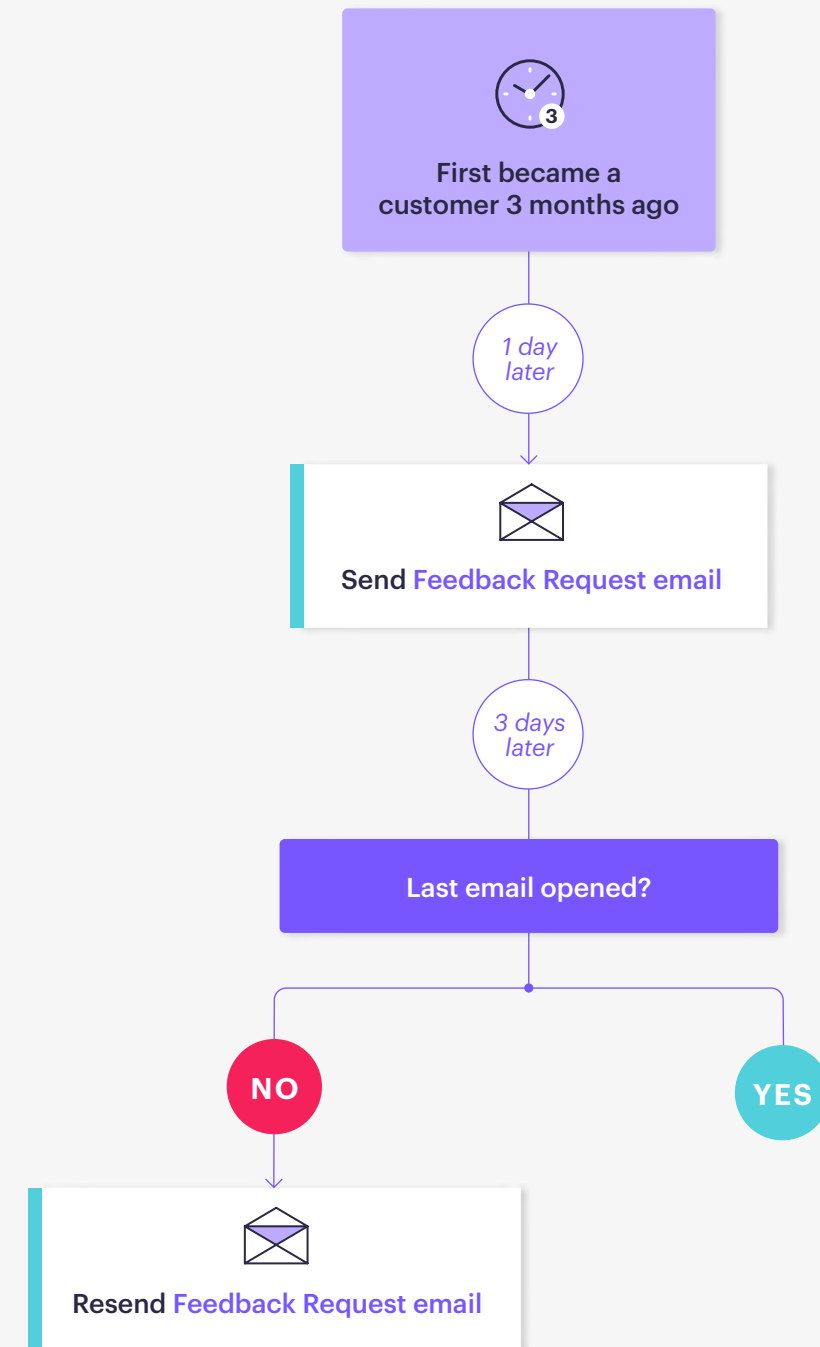
an opinion on your business, without being too long that they might forget about their specific interactions with you.

Keep your emails and survey short, to increase likelihood of customer engagement. And don't forget to include why you want this information. Our fictional hotel, the Aurora Lake Inn, shows how it's done.

**FOR:** 3 month tenured customers

**TRIGGER:** Been a customer of yours for 3 months

**LENGTH:** 1-5 Days





## STEP 1

# The feedback request email

DAY 01

VOICE & TONE First-person, straightforward

Your first email should:

- Remind them of the item(s) they purchased
- Explain how product reviews help your company
- Include a CTA that leads users to the review page

The Aurora Lake Inn's focus in this email is on the customer rather than making a sale. This approach works because they're building trust.

### Content Example

**Subject 1:** How are we doing?

Hey {Name},

Thanks for being a valued customer of Aurora Lake Inn. We'd like to know if we did our best to help you relax and rejuvenate in your recent stay with us. Will you fill out a brief (4 questions) survey?

Thanks for helping us make your next stay even better.

<<Take the Survey>>

## STEP 2

# Resend the feedback request email\*

DAY 03

VOICE & TONE First-person, straightforward

Don't let too much time lapse between your initial email and your follow-up. You may choose to change your subject line, but there's no need to.

Aurora Lake Inn prefaces its existing subject with a simple phrase to show it's a resend of a previous email.

### Content Example

**Subject 1:** Re: How are we doing?

Hey {Name},

Thanks for being a valued customer of Aurora Lake Inn. We'd like to know if we did our best to help you relax and rejuvenate in your recent stay with us. Will you fill out a brief (4 questions) survey?

Thanks for helping us make your next stay even better.

<<Take the Survey>>





# The Net Promoter Score (NPS) survey Journey



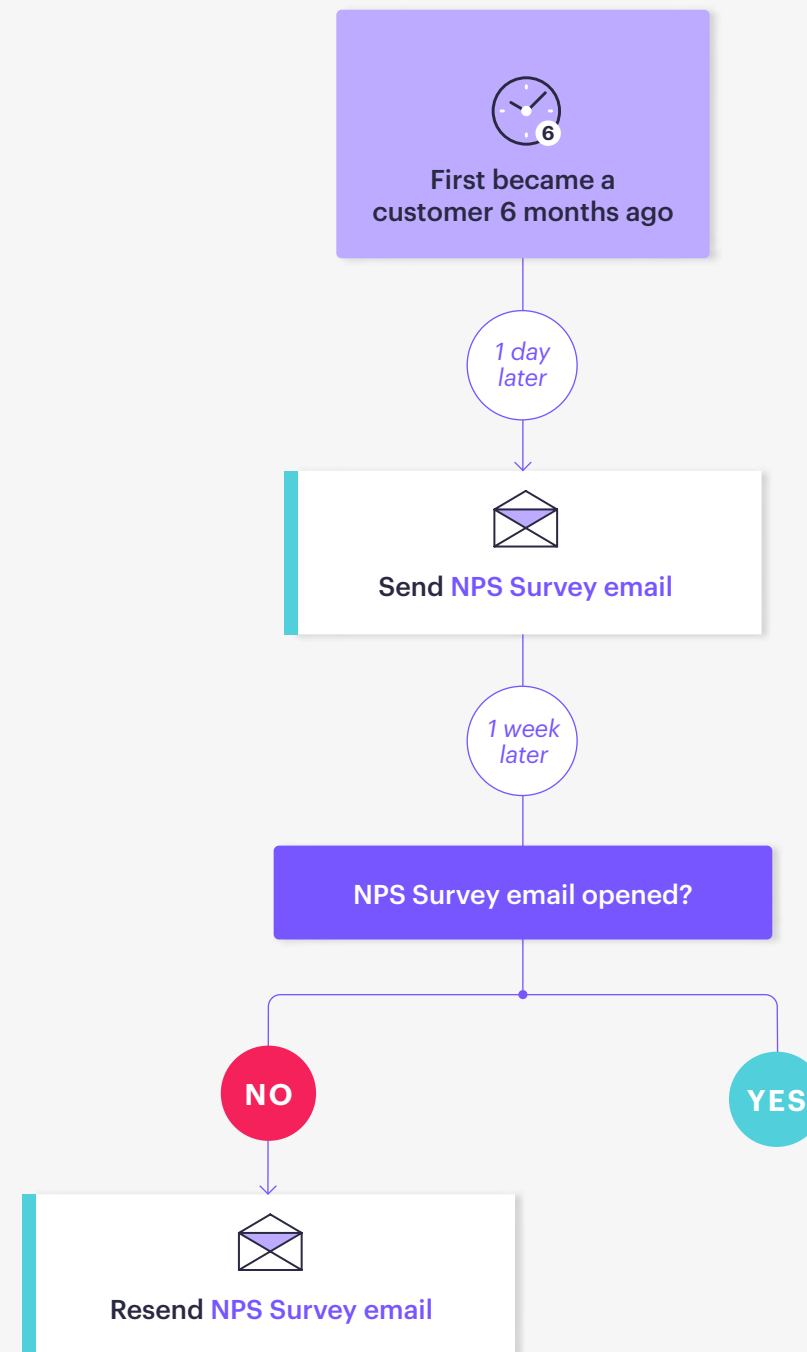
Reviews of specific products and interactions give snapshots of a consumer's feelings toward your brand. Get a more general temperature with a Net Promoter Score (NPS) survey. The NPS isn't meant to gather information about one interaction but about a customer's big-picture feelings toward your brand.

We demonstrate how this email journey might work for Carver-Strong Insurance, a fictional brokerage service.

**FOR:** Been a customer of yours for 6 months

**TRIGGER:** It's been at least 6 months since someone made their first purchase

**LENGTH:** 1-7 days



## STEP 1

# The NPS survey request email

DAY 180

VOICE & TONE First-person, straightforward

There's no need to include any information about your value propositions or recent interactions with a customer in this email. If they're a longtime fan, they already know.

*Keep it simple and:*

- Request feedback
- Explain how their response helps you

Many companies also include an incentive for anyone who finishes the survey. In this example Carver-Strong Insurance keeps it simple, relying on the brevity of the survey to encourage responses.

### Content Example

**Subject 1:** Are you happy with your insurance?

Hi {Name},

We're always looking to improve the quality of service we provide to our customers. Can you answer two questions to let us know if we're on the right track?

<<Take the survey>>

Thanks for your feedback.

Mark A. Hammer  
Customer Service Representative  
Carver-Strong Insurance



**Reminder:** NPS surveys ask the same one question: "How likely are you to recommend Carver-Strong Insurance to someone else?", with radio buttons capturing responses from "very unlikely" to "very likely". You may also want to include a second question "Why do you feel that way?" to capture more detail that can be used by your business.





## STEP 2

# Resend the NPS survey request email\*

DAY 187

VOICE & TONE First-person, straightforward

After a week, your customers have likely either responded, deleted your first email, or lost it in their inbox. Send a reminder to catch those who might be interested but missed the last one.

There's no need to change your body text — in fact, you probably shouldn't because there are only so many ways to ask the core question in an NPS survey. Subject line variations are fine but not necessary.

Carver-Strong just adds one word to their subject to get the audience's attention.

### Content Example

**Subject 1:** [Survey] Are you happy with your insurance?

Hi {Name},

We're always looking to improve the quality of service we provide to our customers. Can you answer two questions to let us know if we're on the right track?

<<Take the survey>>

Thanks for your feedback.

Mark A. Hammer  
Customer Service Representative  
Carver-Strong Insurance

\*only if necessary

## Personalize your approach for the best results

Like all good recipes, every email journey you just learned can be personalized. Our goal with this book was to provide a starting point for some of the most useful email automations. However, not everything will apply to every marketer — and that's okay!

Once you get a taste for how automations work, A/B test your journeys to learn what your customers like best. Campaign Monitor makes it easy to update your email copy, timing, and even the number of steps in your automation.

Our hope is that this recipe book is only your first foray into the world of email automation. There are many more advanced and complex journeys you can build to keep customers engaged and increase sales. So, don't be afraid to stir up something of your own if you see a need for it. Your creativity is the only limit.



### Sources

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## About Campaign Monitor

Campaign Monitor is a global technology company providing a powerful yet intuitive marketing platform. Founded in 2004, we built our platform around a simple idea — that creating and sending beautiful email campaigns should be, well, easy.

This mission guided us when we started Campaign Monitor years ago, and it guides us still today. Except today, we don't stop at email creation. Campaign Monitor gives marketers the tools they need to send smarter campaigns through [automation](#) and [segmentation](#) — and even incorporate [SMS](#) — without feeling like technology is getting in their way.

For more information about Campaign Monitor, or to try it for free, visit [campaignmonitor.com](https://campaignmonitor.com).