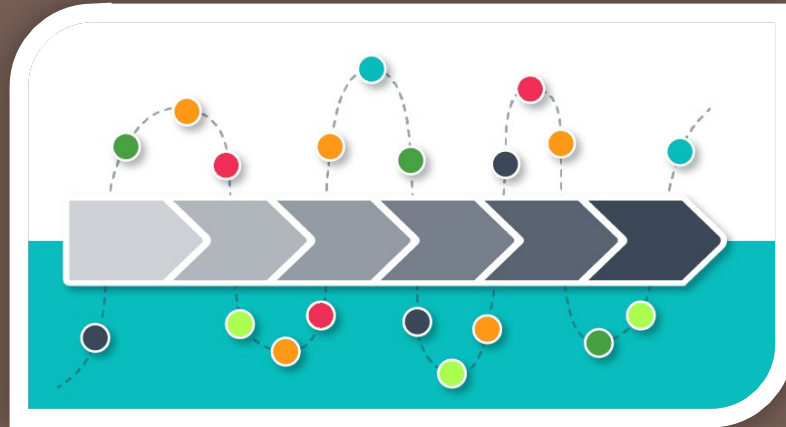


# AUTOMATED EMAIL JOURNEY STRATEGIES & PITFALLS TO AVOID



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Founder & Principal



# About Karen

Leading Email & Digital Marketing Strategist,  
Optimization Expert, and Professional Educator

## Making Email Marketing Easier since 2003

- Leading email marketing expert, speaker and strategist
- Internationally-known digital marketing consultant and thought leader
- ANA Email Excellence Center (EEC) Co-Chair
- DMI, ANA, and MarketingProfs Professional Educator
- Serving data-driven marketers worldwide including:



# Freebies!

- Email Strategy Digital Workbook  
and
- Optional Strategy Session with me  
(a \$350 value)



Scan QR code or visit  
<https://form.jotform.com/karen562/emailstrategyworkbook>

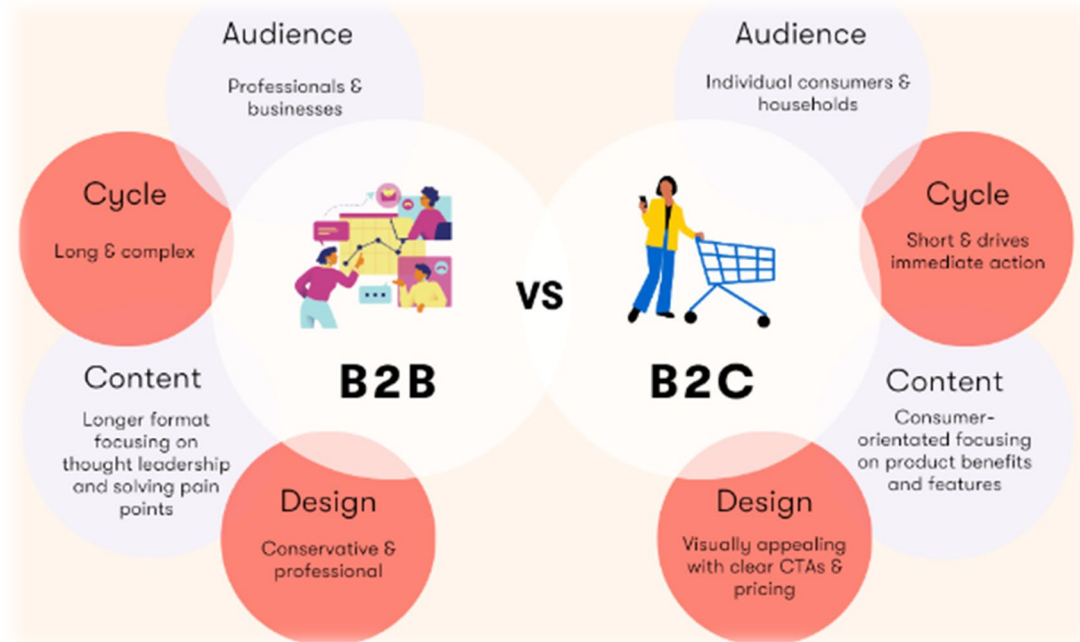


# Automation **Supercharges** Email



# B2C? B2B? Everyone Wins!

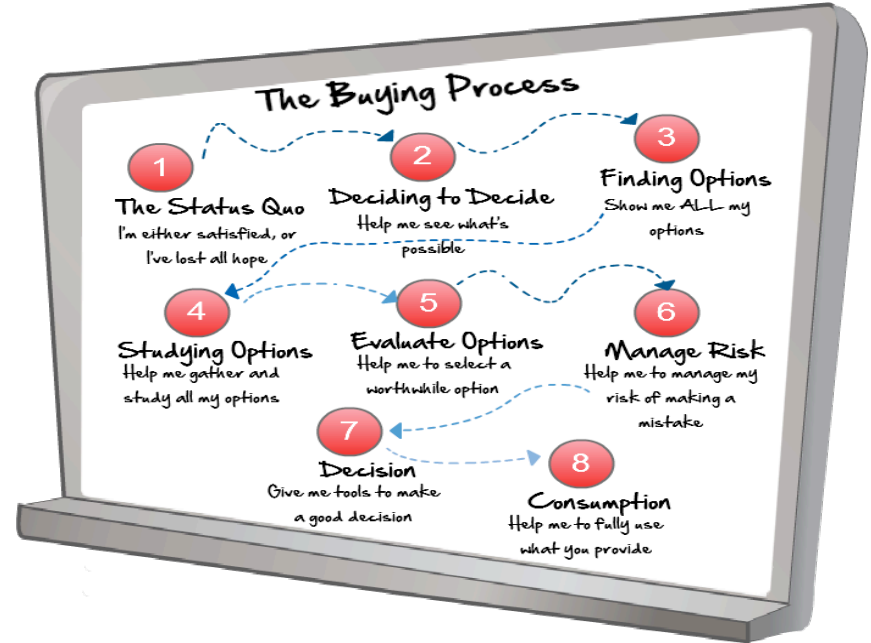
- BUT key differences exist in how automation is applied
- The good news: *Segmented, personalized campaigns have been shown to drive a 760% increase in revenue*



# Mindset Over Skillset

## □ Do You Know Journey

- Initiation Points?
- Most Common Path to Purchase –  
*long? short? simple? winding?*
- Stall Points?
- Encouragement Points?



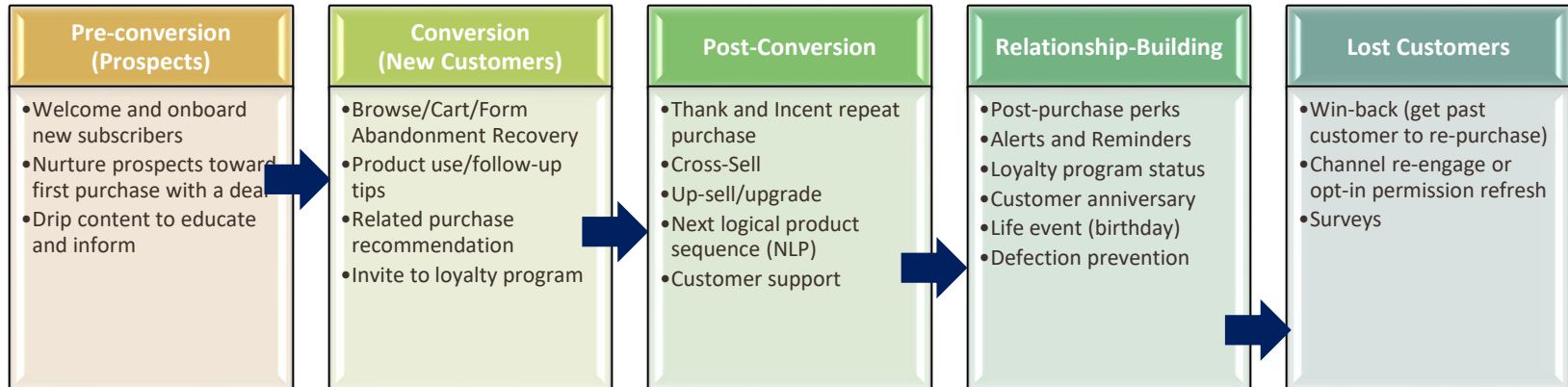
# The 4 Paths to Purchase

- ❑ Do you know which **conversion path** your prospective buyers take in deciding to become customers?
- ❑ Which type of path does your product or service **require**?
- ❑ Craft email journeys to accelerate and streamline the consideration path *and* overcome hesitation or stopping points



# Align Journeys to Lifecycle Stages

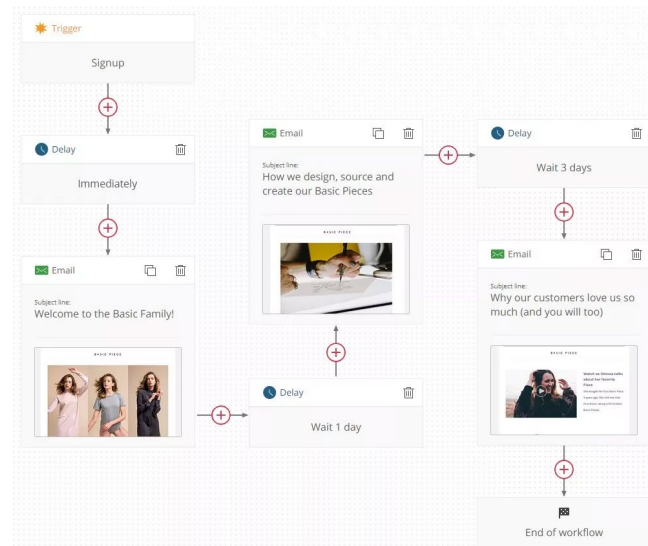
- Each stage of the customer lifecycle deserves messaging aligned to the needs, motivations and inclinations of its audience at that stage
- Automated messages or multi-touch journeys triggered at different stages **progress relationships forward and mirror the natural stages of the customer lifecycle**





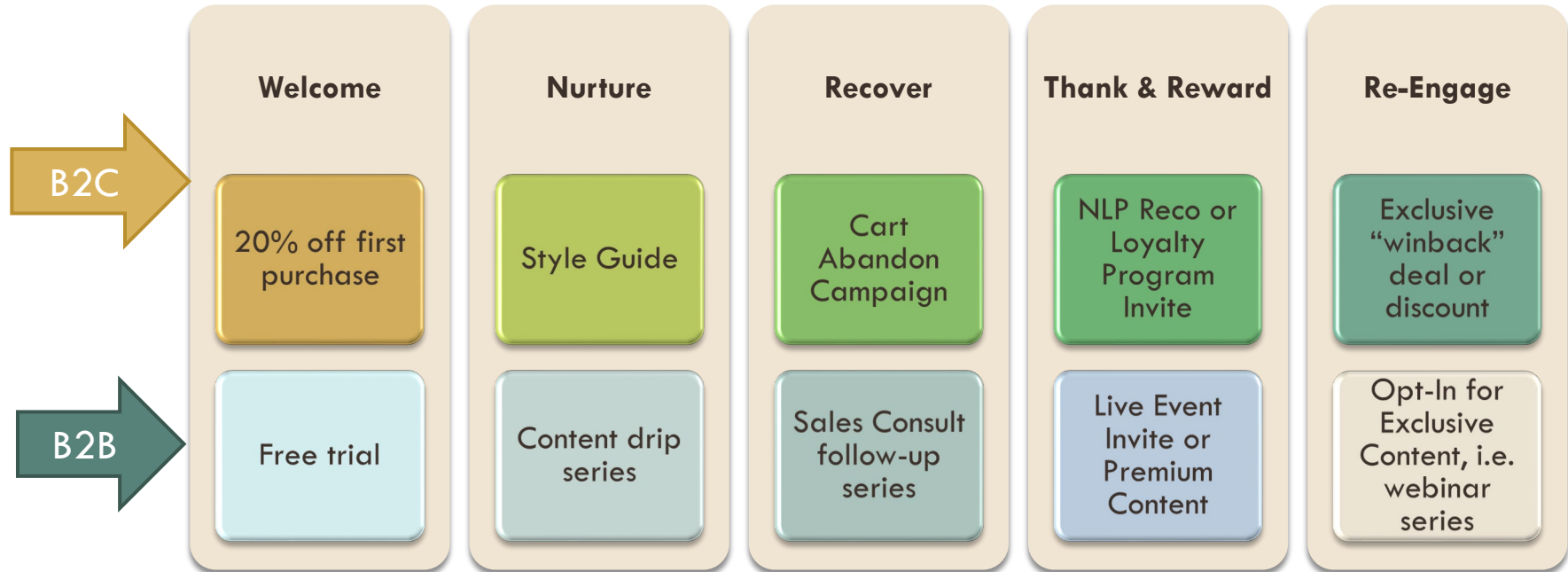
# Let's Start with the Simple

- Usually short - a few emails
- Few if any branching paths
- Minimal dynamic personalized content
- Driven by simple triggers
- *But are **any** email journeys really that simple?*



# Journey Types: Simple Stage-Based

- Some of the simplest are the most effective, and equally applicable to all audiences



# The Big 5 for eComm



# Starting Off Right

- 🔗 Acknowledging new relationships **pays big dividends** and **accelerates the path to first purchase**

*The average open rate for welcome emails is a whopping **50%** Making them **86%** more effective than email newsletters. Make setting up an automated welcome email step one in your email marketing strategy.*



...  
Source: [MarketingSherpa](#)

*Retailers that send a series of welcome emails see **13%** more revenue than those that send just one.*

*Keep the automated emails going to get even better results (with less work.)*



# Lilly Pulitzer Welcome Journey

- ❑ Subscribers via site are asked for both email and mobile phone number, but both are not required
- ❑ Immediate welcome email with offer sent
- ❑ Follow-up invites and dynamic site session popups to join loyalty club are issued, with separate email welcome for Club Lilly members

## Sign Up for Email & Get 20% Off

Get the latest on new arrivals, prints & more, plus 20% off your first purchase.

Email

---

Mobile Number

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By signing up, you agree to our [Privacy Policy](#) and [Terms & Conditions](#)

**Sign Up**

# Lilly Pulitzer Welcome Progression

Immediately Upon Opt-In

Day 1 after Loyalty Sign-Up

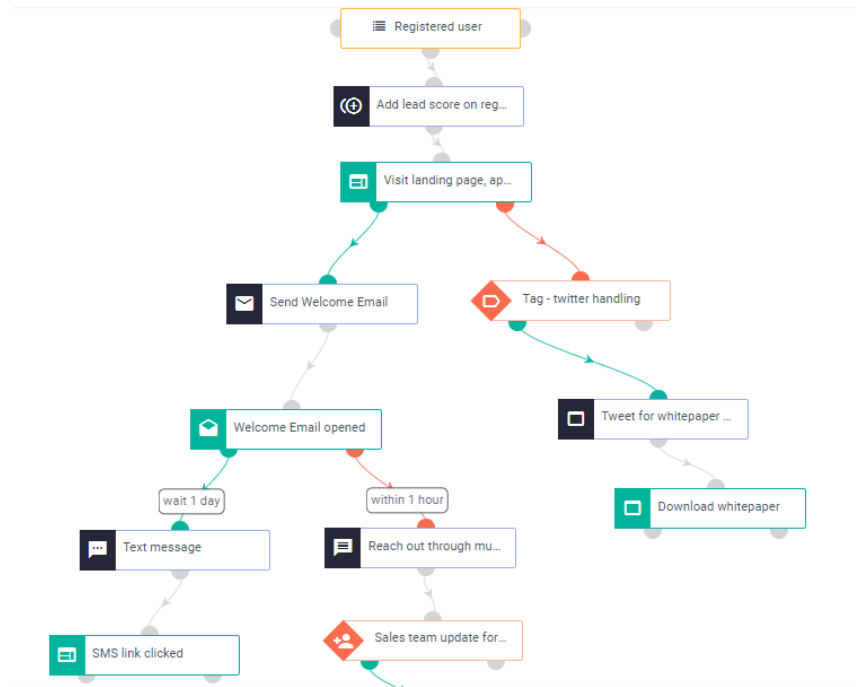
Day 8 after Loyalty Sign-Up

When Spend Threshold Reached

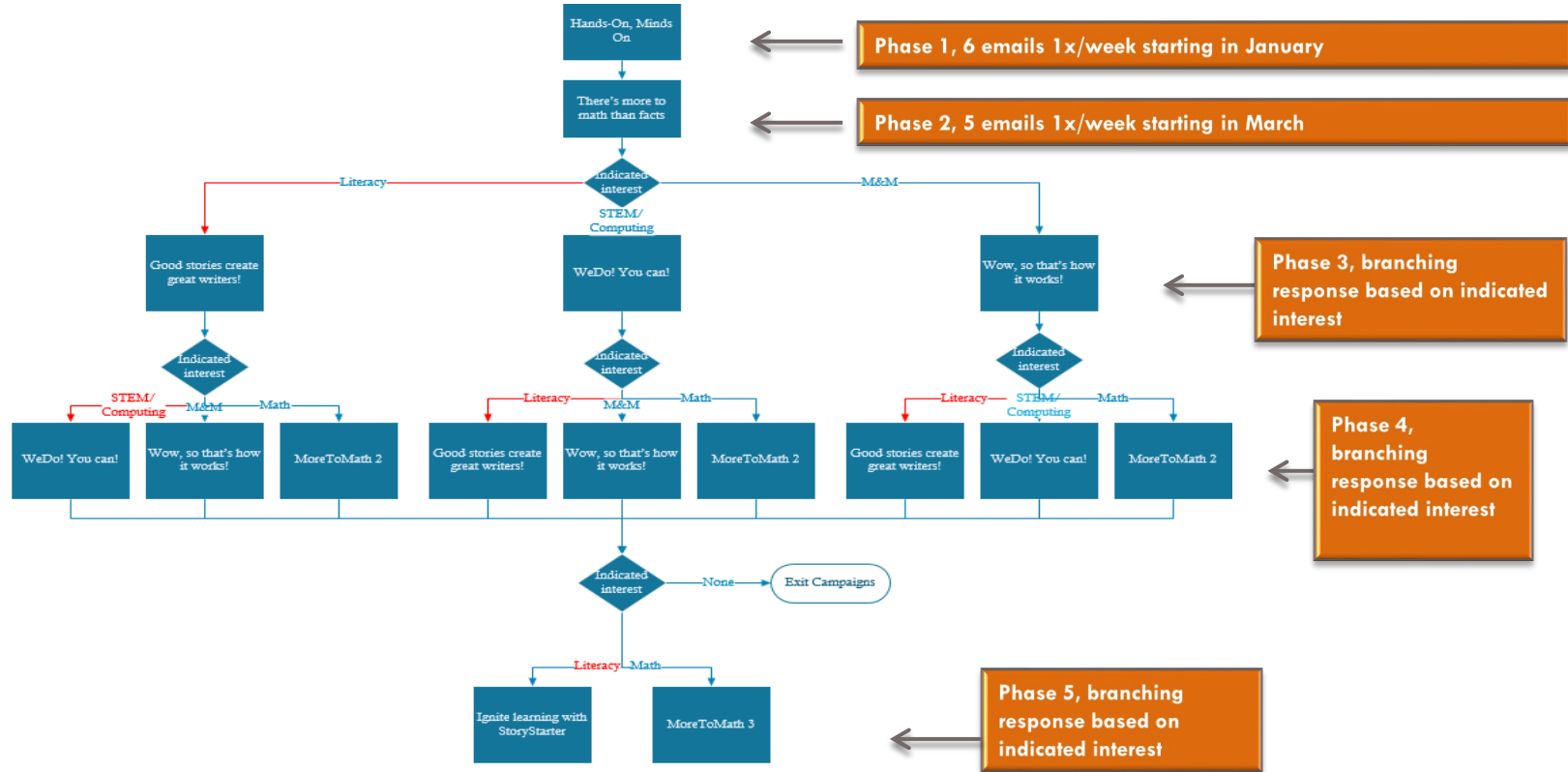


# Moving from Simple to Complex

- ❑ Lengthy
- ❑ Include conditional branches driven by response or non-response to previous messages
- ❑ Include dynamic content personalized by subscriber
- ❑ Driven by lead/content scores
- ❑ **Omnichannel**  
often email + SMS at a minimum, but could include direct mail, mobile app push notifications, or more

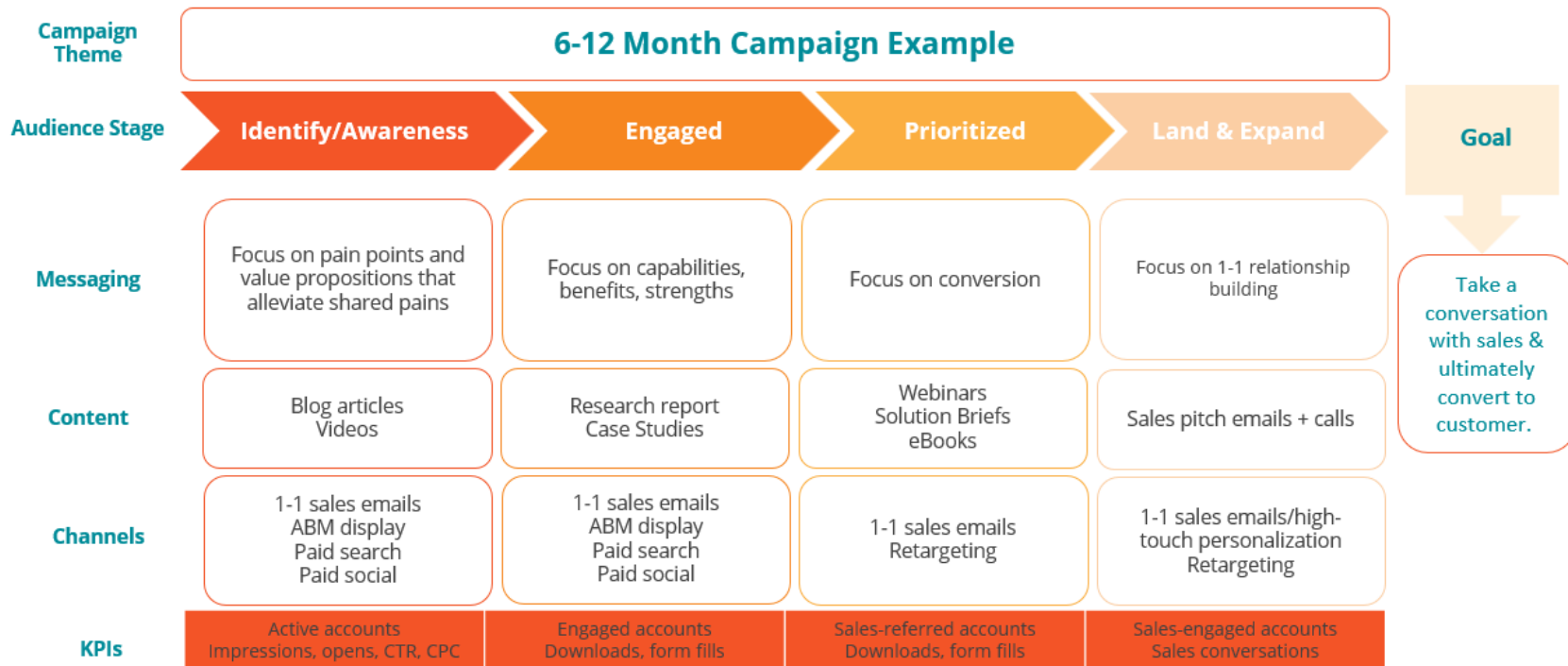


# B2B Example: Lego Education





# B2B Content Marketing Framework



# Skillset

- ❑ Proper Planning Avoids Common Pitfalls
- ❑ Orchestration Considerations
- ❑ Optimizing for Response
- ❑ QC



# Common Pitfalls to Avoid



# Orchestration Considerations

- Multi-Journey Hierarchy
  - ▣ What happens if someone is still in welcome and then they abandon cart?
  - ▣ Broadcast email priority vs. journey priority
- Entry/Exit Rules
  - ▣ Which triggers initiate a journey? Which behaviors qualify for exit?
- Suppression Rules
  - ▣ Subscribers or segments who should NOT be included? Why?
- Frequency Limits
  - ▣ What are max # of email touches per month? Does being in a long journey or too many at once violate it?



# Where to Optimize vs. Test?

## Optimize

Incentives, discounts, GWP  
(especially for welcome, recovery)

Dynamic, personalized content

Response-driven offer progression

## Test

Offer types & parameters

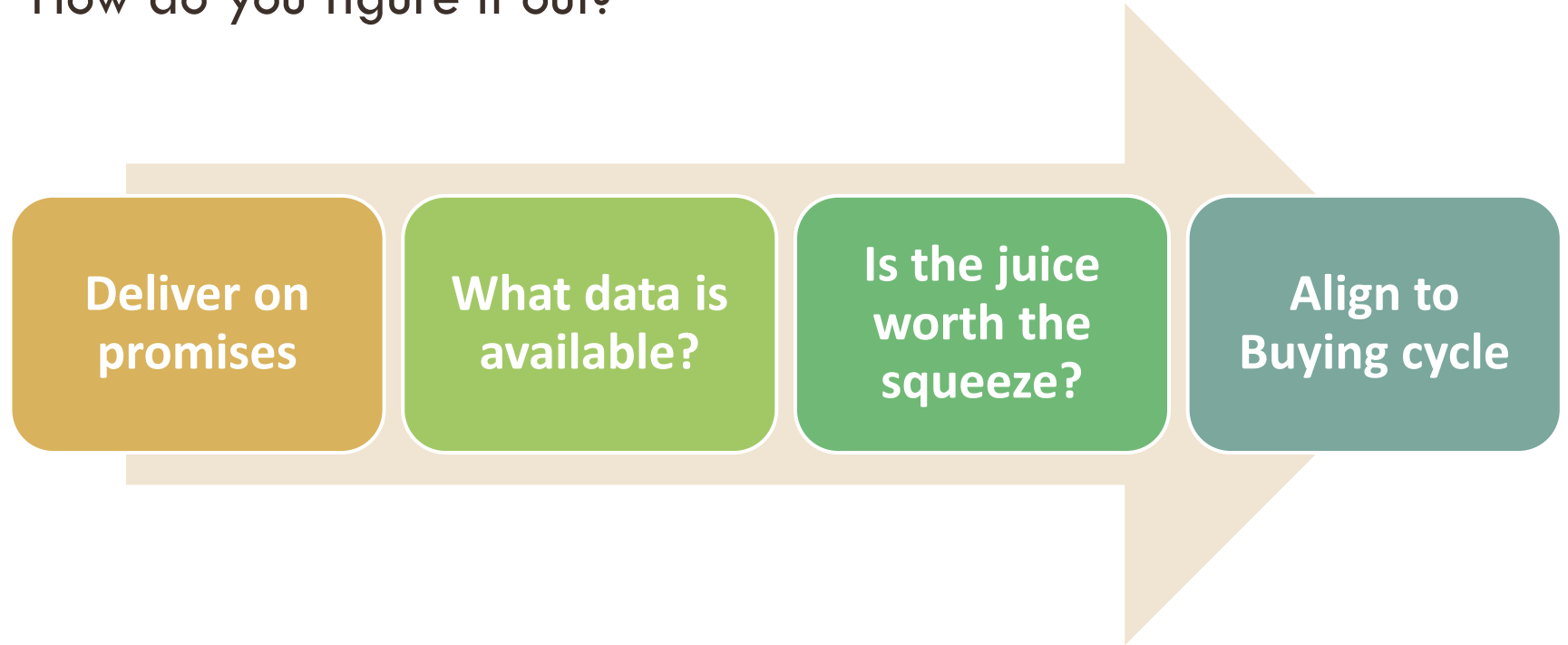
- % off vs. gift with purchase
- Free trial vs. content
- Deadline vs. open-ended

Series cadence

- Total # of messages
- Interval between messages and total length of series
- Multi-offer progression

# Prioritizing Email Automations

- How do you figure it out?



# Last But Not Least

- ❑ Who owns?
- ❑ How do you pre-test before launch?
- ❑ Shelf life and maintenance
- ❑ Reporting and Analytics

## QUALITY CONTROL



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# QUESTIONS?

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