The Top Five Workflows You Should Be Using

An email workflow is a series of automated emails which are sent, or not sent, based on who subscribers are and how they interact with your business. Since email workflows are triggered based on what you know about your subscribers, they allow you to send the right emails to the right people at the right time. Email workflows help improve conversion rates and customer loyalty, but which ones are right for you? Take a closer look at some of the most popular and successful email workflows.

Engaged Contacts Workflow: Foster Customer Loyalty

Engaged contacts are extremely valuable to your business. According to Gallup, consumers will spend more money with businesses they feel emotionally connected to and ignore or even oppose those that give them no value. We see this across a variety of industry sectors. For example, customers who are fully engaged with their primary bank bring 37 percent more annual revenue to the financial institution than disengaged customers. Fully engaged shoppers make 44 percent more visits to their favorite consumer electronics stores than disengaged shoppers and spend an average of $373 per shopping trip, compared to just $289 for disengaged shoppers.

An email workflow can nurture the interest that engaged contacts show in your business. An advanced email marketing service like iContact Pro will allow you to create a smart list comprised of your most engaged subscribers. Behavioral actions like a high number of website visits, email click-throughs, clicks on social media posts, and form submissions could trigger inclusion on the list.

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The people on the list will receive special targeted emails that acknowledge their importance to your organization and help generate buzz. For example, a fragrance retailer might offer free samples to the members of the engaged contact list, or allow them to view promotional videos for new fragrances before their official release. It's likely your engaged contacts will share their experience with friends, especially if they feel their loyalty is being rewarded.

Re-Engagement Workflow: Convert Inactive Leads

If engaged contacts are very valuable for your organization, it stands to reason that inactive contacts are doing very little for your business. But don't write them off. A re-engagement workflow could be just the thing to remind them of the great work you're doing and convert them from inactive to engaged subscribers.

Once subscribers meet a certain level of inactivity, the automated re-engaged workflow will commence. The workflow may be triggered if a subscriber hasn't opened one of your emails or made a purchase with you for a long time.

The first email in the re-engagement workflow should contain an enticing offer, such as a gift voucher, discount coupon, or free gift with purchase offer. This should help get recipients excited about your company again. If a recipient doesn't respond to the offer within a set period, the next step in the workflow may be sending another email reminding the subscriber that the offer will shortly expire. You may also like to use this as an opportunity to check that the customer wishes to remain on your email list.

New Customer Welcome Workflow: Nurture New Leads

Your customers are the lifeblood of your organization, so it makes sense to have several email workflows dedicated to treating them better. When a person shops with you for the first time, a series of well-crafted automated emails can give them a great impression of your organization.

The first email in the workflow should focus on welcoming the customer and thanking him or her for the recent purchase. If the product or service purchased requires a little extra training, like a computer program, you could also offer some tips and tricks for easy use.

Follow-up emails should be focused on introducing your business to the new customer. You might have an email containing a brief history of your organization, and another introducing the shopper to your social media channels and encouraging participation. A final email in the workflow could offer a gift voucher or discount coupon to show that you value the customer's patronage and hope he or she will shop with you again soon.

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Abandoned Shopping Cart Workflow: Encourage Shoppers to Return

If you only make a fuss over people who make a purchase, you could be losing a significant number of sales. An abandoned shopping cart workflow can help you recover a percentage of those transactions.

This workflow is triggered once someone adds an item to his or her virtual shopping cart, but fails to complete the transaction. Studies show that nearly half of all shopping cart reminder emails are opened, more than 13 percent of these emails are clicked on, and more than 35 percent of those clicks lead to purchases.

If your first shopping cart email doesn't yield results, the workflow could trigger another email which makes the deal sweeter. For example, you might offer the customer a limited time discount on their purchase or free shipping. These extra offers could be just what the shoppers needs to make up their mind about a purchase.

Alternatively you might send an email promoting similar products. This approach could appeal to shoppers who felt the item they added wasn't quite right, but might be interested in another product from your catalogue.

Event Workflow: Communicate with Attendees of Live or Virtual Events

Whether you're hosting a live or an online event, you can communicate the information your attendees need to know with an event workflow. This event workflow is triggered with the purchase of event tickets or online event registration.

Once triggered, the event workflow begins sending out automated emails featuring useful information leading up to the event. For example, if your company's hosting a conference, your event workflow emails could contain information about its speakers, the event's schedule, how to get to the venue, and nearby hotels.

You needn't stop your event workflow after the event is over. Follow-up emails could direct attendees to online content relevant to the event and offer information about similar events you've planned for the future.

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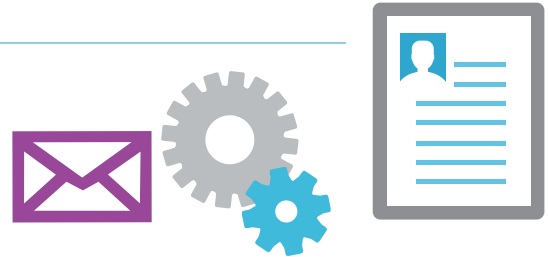
Make sure you're using these email workflows to boost your conversion rates, improve customer loyalty, and increase your bottom line.

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