

Email Automation Workflow Document Sample

1. Workflow Overview

This document outlines the structure and flow for an automated email campaign for new user onboarding.

2. Objectives

- Welcome new users.
- Introduce key features.
- Encourage account setup completion.
- Gather user feedback after onboarding.

3. Workflow Diagram

1. User signs up
2. Trigger: Welcome Email (immediately)
3. Wait: 2 days
4. Trigger: Features Introduction Email
5. Wait: 3 days
6. Check: Has user completed profile?
7. If No: Send Profile Completion Reminder
8. Wait: 5 days after first email
9. Trigger: Feedback Request Email

4. Email Sequence Details

Email	Trigger	Timing	Purpose
Welcome Email	User signs up	Immediately	Welcome, next steps, help resources
Feature Intro	2 days after signup	2 days	Introduce product features
Profile Reminder	User incomplete profile	5 days	Encourage profile completion
Feedback Request	Workflow completed	5 days after welcome	Request user feedback

5. Sample Email Content

Welcome Email

Subject: Welcome to [Product Name]!

Hello [First Name],

Welcome to [Product Name]. We're excited to have you on board. Here are a few resources to get started: ...

Feature Introduction Email

Subject: Discover What You Can Do with [Product Name]

Hi [First Name],

Get to know some great features to help you succeed: ...

Profile Completion Reminder

Subject: Complete Your Profile and Unlock More

Hi [First Name],

Don't forget to finish setting up your profile for the best experience. It only takes a minute!

Feedback Request

Subject: We Value Your Feedback!

Hi [First Name],

Your feedback helps us improve. Please take a moment to share your experience with us.

6. Notes

- All emails are personalized using user data.
- Opt-out option included in every email.