

# THE ULTIMATE **MARKETING** **AUTOMATION** CHECKLIST

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Automation is the ultimate productivity booster — you can reduce risk by minimizing human error, speed up operations by doing away with hands-on involvement, and enhance collaboration by bridging gaps between teams.



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# CAPTURE LEADS

-  **Canned responses to first-time inquiries.**  
Don't leave them hanging, or wait till someone from your team is online before responding.
-  **Welcome email campaigns.**  
Show new customers around your business to expedite sales and maintain interest.
-  **New customer data storage.**  
Don't lose their data! They trust you to have their info on file once they've handed it to you.
-  **Segmentation.**  
Segment your leads by demographics and behaviors (e.g. clicked an email link or shared content on Facebook).
-  **Highlight "hot" leads.**  
Alert designated sales representatives about customers who display high interest and potential.








# NURTURE CUSTOMERS

-  **Repurchase email campaigns for active customers.**  
Transform buyers into die-hard advocates by staying relevant to your customers' needs.
-  **Winback email campaigns for inactive customers.**  
Reach out to customers after a designated period of inactivity.
-  **Basic troubleshooting that customers can DIY.**  
Customers don't always want to "talk to someone." For certain issues, set paths that they can follow to solve problems on their own.
-  **Quickly assign customer issues to designated contact person.**  
When customers do want to ask questions, make it easy for them to be directed to the correct human or have access to a live chat or phone call.
-  **Birthday or registration anniversary reminders.**  
Show customers you care with personalized interactions like these.



# GENERATE SALES

-  **Multichannel marketing.**  
Combining email, social media, and SMS ads to reach out to your customer where they are most active.
-  **Outbound links.**  
Triggers for customers to bounce to and from all your media channels, such as between social media and your website and your emails.
-  **Appointments or special offers.**  
For service businesses, remind customers of their appointments with you; for products, alert them to special offers such as holiday sales.
-  **Reminders for abandoned processes.**  
Email customers who have left mid-process—registrations, transactions, unpurchased shopping carts, etc.
-  **Categorize customers by behavior.**  
Personalize email campaigns and encourage repeat purchases based on these categories.



# STAY ENGAGED WITH SOCIAL MEDIA



## **Multi-platform posting.**

Automation software also makes it possible to share on multiple social networks (Twitter, Facebook, LinkedIn) simultaneously.



## **Gauge customer satisfaction with social media analytics.**

There are plenty of social media analytics tools that automate reporting and track the metrics.



## **Share or review triggers.**

Redirect customers to share or review products on social media upon purchase.



# MANAGE PROJECTS IN THE OFFICE

-  **ROI reporting.**  
Most marketing automation tools have built-in return on investment (ROI) reporting for the majority of your marketing campaigns.
-  **Calendar reminders for team meetings.**  
Stay on top of team schedules with reminders in your inbox or messaging software for upcoming meetings.
-  **File sharing and management.**  
Learn how to perform automated file transfers within your network using integration tool like Zapier.
-  **Hiring and collecting job applications.**  
Automation tools can source candidates to schedule interviews, screen applicants, and organize application documents.

**BONUS TIP:** Automate your creative marketing with [Design Pickle](#)! Our flat-rate graphic design subscription is integrated with [Zapier](#) — meaning you can supercharge your design workflow by automating tasks such as submitting new requests or organizing files with the apps you already use and love. Learn more [here](#)!

