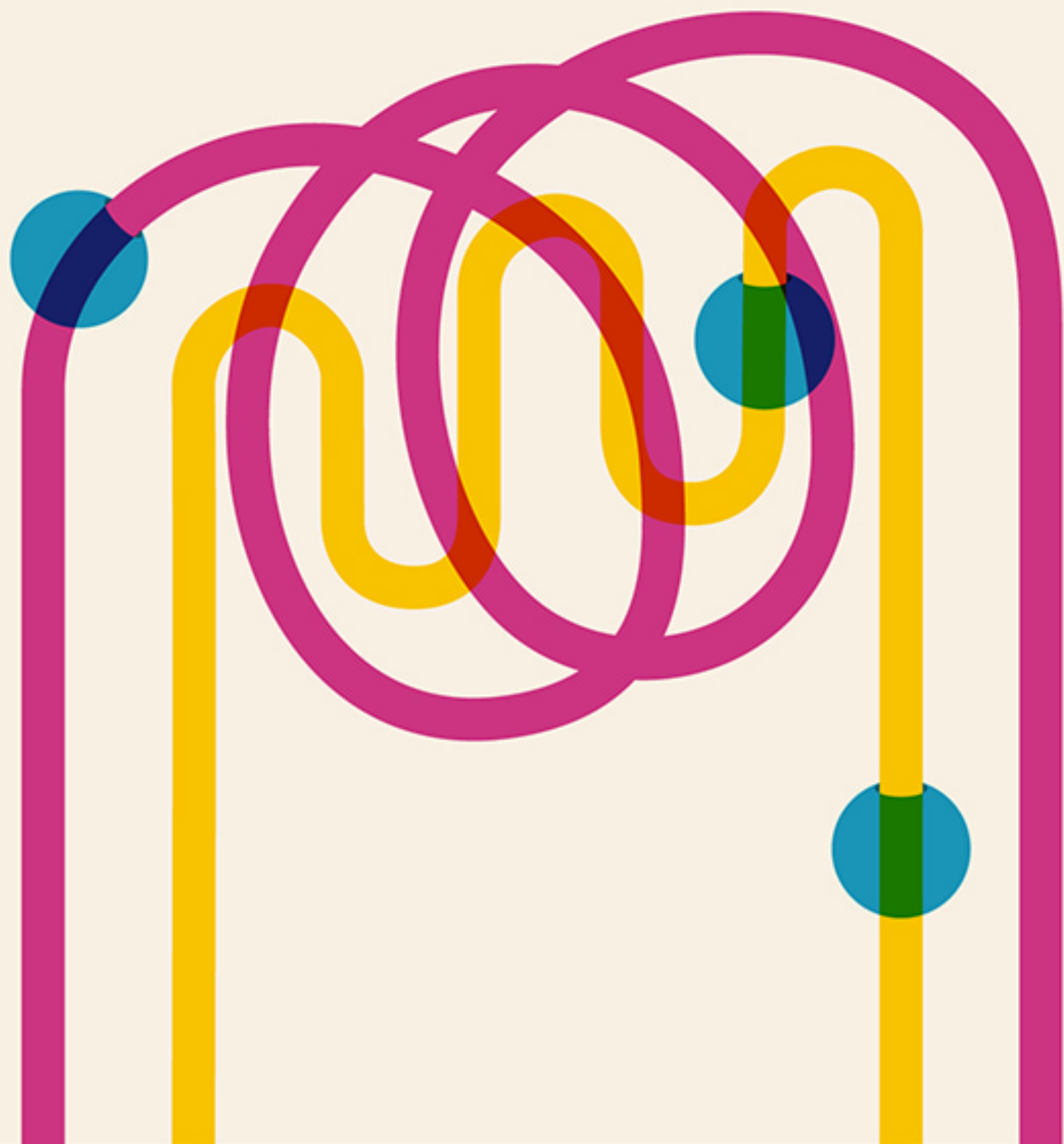


**Working With**

# **Automation**



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# Hello.

Automated emails deliver information to your customers right when they need it, in a way that's efficient for you and your team. Send a series of emails to introduce your new customers to your company, share product recommendations based on what your customers have purchased in the past, wish your subscribers a happy birthday, and more. With MailChimp's [automation workflows](#), you can easily create and track trigger-based emails that automatically send to your subscribers. In this guide, we'll walk you through how to set up a workflow, share tips and tricks for getting started, teach you how to learn from your reports, and show a few inspiring examples to help you on your way.

Workflows are available in all [paid MailChimp accounts](#). You can upgrade your account to a monthly or pay as you go plan in your account settings.

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## The Basics

[Workflows](#) use triggers to send an email or a series of emails to specific subscribers on a list. A trigger can be an open or click in one of your campaigns, a subscription to your list, or an action that's combined with one of MailChimp's other features.

We've created a series of workflows with pre-built triggers to help you get started. If those don't fit your needs, you can also create a custom workflow of your own.

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## How automated emails work

MailChimp workflows operate on conditional logic: If A happens, then B will happen. This means that when you're setting up your workflow, you're creating specific conditions for emails to send. There are lots of triggers you can choose from to create the conditions for your emails.

- **Activity-based workflows** are triggered by the actions of a subscriber. The send time of each email will depend on the send time of the previous email in the series. For example, if a trigger is set to send a welcome email 1 day after someone subscribes to your list and then a follow-up email a week after they subscribe, you would set the follow-up email to go out 6 days after your welcome email, or 1 week after your subscriber joined your list.
  - If you pause a single email in a workflow, subscribers will queue up for the paused email until it's turned back on. Subscribers who are beyond that point in the timeline will continue to receive the remaining, active emails as planned.
- **Date-based workflows** calculate when to send emails based on the distance from a specific date (or trigger)—not the actions of the subscriber. For example, if you sent 2 emails to a subscriber, one a week before their birthday and another one day before their birthday, you would set the first email to send seven days before the absolute date and the second email to send one day before.
  - If you pause your date-based workflow, subscribers won't wait in the queue for next email, because there is a specific date on which they need to get the email. If the workflow or email is inactive at the time a subscriber is scheduled to receive something, the email won't go out at that time, and the subscriber moves into the next queue in the workflow.

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## When to use automation

An automation workflow is great when you have content you want to automatically deliver to your subscribers at a specific time. Here are the common scenarios available in our pre-built workflows:

- **When a subscriber signs up for your list:** Welcome new subscribers with a single email—or a series—to help them get to know your company. Tell them what they can expect in future newsletters, send a special coupon, or give them tips on how they can take advantage of everything you have to offer.
- **When you have a series of emails:** Maybe you have educational content, like an online course, that needs to be sent out on a regular basis over a period of time. Break that information into a series of steps that can be sent over days, weeks, or months.
- **When you need to send an email once a year:** This might be for a subscriber's birthday or an anniversary. Set the workflow to send annually, and we'll take care of the rest.
- **Following up on website activity:** When a subscriber navigates to a specific link on your site from a newsletter, automatically send them follow-up information using [Goal](#). Help them make a purchase decision, or send a survey about their experience on your website.
- **When you want to thank your best customers:** The customers who purchase from you on a regular basis are important to your business, so let them know. Send a simple thank you, invite them to a special VIP program, or offer a discount.

- **Follow up after a purchase:** Send additional product recommendations or product care tips based on what your customers have purchased.
- **When you want to get feedback:** Use a survey to make your customers feel valued and get important feedback about their shopping experience on your site.

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## When not to use automation

The possibilities of automation seem endless, but there are some scenarios where using this feature doesn't make sense. You want to make your customers feel special, not like they're interacting with a robot.

- **When you want to send a personalized note:** Personalization can only go so far with automation. It's hard to sound human when you're delivering pre-written copy that sometimes goes to many other subscribers. To send a truly personal note to a small group of your loyal customers, it's best to write something fresh every time.
- **When there's more content than you can manage:** When setting up automation, keep in mind the potential time commitment. The more custom and targeted your messaging gets, the longer it will take you and your team to set up, test, and create new content. A few basic workflows can still be powerful—and manageable for a team to execute and maintain.
- **When you need to send transactional email:** A transactional email contains one-to-one content tailored specifically to an individual user, like a Facebook notification or a password reset. While workflows can handle one-to-one marketing emails, such as a welcome message to a new subscriber, they're not designed to handle large volumes of transactional email.

For transactional emails, we built our email infrastructure service, [Mandrill](#). It's optimized for password reminders, order confirmations, receipts, and personalized notifications. Mandrill offers advanced tagging, reports, inbound email processing, webhooks, and mobile apps to monitor your transactional emails.

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# Before You Start

Whether you create a custom workflow or use one of MailChimp's pre-built options, there are a few steps you'll need to think through before building your first automation workflow.

## **When should emails send?**

You can decide the timeframe and what days of the week you want the email to go out. Immediately after the triggering action? The next day? The next week? It's your call.

For workflows with multiple emails, you'll also decide how much time should pass between each new message being sent. If you're not sure about how to pace your content, set up a test workflow with the delays you're considering, then send that workflow to yourself. Or take a look at your own inbox: Are there companies sending to *you* too frequently? Consider spacing your own emails further apart.

You can decide which days of the week to send both custom and pre-built workflow emails. If you have content that is likely to get missed over the weekend, don't schedule an email for delivery on Saturdays or Sundays. The time delays you've built between emails will take the days you exclude into account. So, if your series has a 3-day delay between emails and one message sends on a Friday, exclude Saturdays and Sundays so the workflow will start its 3-day delay on Monday. If you want a message to go out on an annual date, you'll want to have the option to send any day of the week.

## **What is the trigger?**

The trigger is an action your subscriber takes that signals to your workflow to start sending. For example, if you want to send a follow-up email to every user that clicked a link in your last campaign, that click would be your trigger. Inactions can also trigger. Maybe the subscriber opened a campaign, but didn't click anything—that can be set as a triggering event, too.

Our pre-built workflows have triggers defined for you—you'll just need to input values for the trigger criteria. Custom workflows require you to define the trigger.

**Will the workflow be tied to a regular campaign?**

If so, you'll need that campaign to be set up and ready to go. Then, you can tie subscriber actions in that campaign to your workflow triggers.

**Who will get the emails?**

Pick a list—or a segment of a list—to associate with each workflow during setup. You can choose to have the workflow send to any new additions to the list that meet your conditions, or send to all subscribers that meet the conditions. To further target your message, send to a specific segment of your list.

**Do you want to receive a daily email that contains reporting data from your workflow?**

In the **Setup** step, you'll notice a *Send activity digest email* checkbox. When this option is enabled, it will send to the selected account users on days when there was automation workflow activity on the previous day. For a more in-depth look at the information provided in this email, skip ahead to the *Reporting* section of this guide.

**Do you have an autoresponder that you'd like to convert into an automation workflow?**

[This article](#) details the steps to follow.



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# Workflow options

There are several preset workflow options to choose from:

- **Subscriber activity workflows** send when a subscriber joins a list in your account, joins or leaves an interest group on your list, opens a campaign, or clicks a link in a campaign.
- **eCommerce360 workflows** send when a subscriber makes a purchase from your website.
- **Date field workflows** send based on a date, such as a birthday or anniversary, or when data in a list field changes.
- **Goal workflows** send when a subscriber visits a page or performs an action on your website.
- **Mandrill workflows** send based on subscriber activity from Mandrill emails.
- **API 3.0 workflows** send based on API calls.
- **Customized workflows** send based off a combination of triggers if the preset options don't offer exactly what you're looking for.

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## Subscriber activity workflows

Subscriber activity workflows are based on subscribers signing up or being added to a list, and can be sent immediately after the triggering action occurs. Minimum send time between emails in a series is 1 hour. Keep in mind that if you want to send to subscribers who were added through list import, MailChimp's API, or a third-party application, you need to select **Edit** on the **Emails** step, then select **Also start workflow when subscribers are imported**.

- **Welcome message** is used to send to subscribers as they sign up or are added to a list in your account. You can send a single welcome email or a series of onboarding emails to your subscribers to provide additional information about your company or inform them of coupons, sales, or other events.

- **Educate subscribers** sends a series of informational emails to subscribers as they sign up or are added to a list in your account. For example, you can send new customers “getting started” guides or links to online courses.
  - **Welcome series** sends a series of emails to subscribers as they sign up or are added to a list in your account. Use this to easily create a series of emails welcoming subscribers to your list or to provide onboarding information to your subscribers. When you select this workflow, you will have the option to add 1 or 5 emails to your workflow. You can then add or remove emails as needed.
  - **Date Subscribed** sends a series of emails to subscribers based on the date that they signed up or were added to a list in your account.
  - **Joins Interest Group** is used to send to subscribers as they join one of the groups in your list. The *Send Immediately* option will send to everyone currently in the group.
  - **Leaves Interest Group** is used to send to subscribers when they leave one of the groups in your list. The *Send Immediately* option will send to everyone on your list who is **not** in the group.
- 

## eCommerce360 workflows

eCommerce360 workflows are based on subscribers' buying behavior and require that [eCommerce360](#) be set up to allow for ecommerce tracking in your campaigns. The first email can send immediately. However, the minimum time between emails is one hour. Keep in mind that on the *Emails* step, you will need to set specifications for the ecommerce trigger, by defining the product or category that your workflow is associated with, for example.

- **Best customers** sends to subscribers based on parameters you set, such as purchase history, the amount spent in a single order, or the amount spent over time. For example, you can send a coupon to subscribers after they make purchases that add up to a specific amount.
- **Specific product purchase** sends to subscribers who have purchased a specific product. For example, you can send a series of emails to users after they've purchased a specific product to give them tips on how to use it or get feedback on their satisfaction with the product.

- **Purchase from category of products** sends to subscribers who have purchased a product from a specific category. For example, you can send a series of emails to users after they've purchased a product from a specific category to show them other products they might be interested in.
- **Any product purchase** sends to subscribers who have purchased a product from your store. For example, you can send a series of emails after users purchase something at your store to say thank you and encourage repeat business.

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## Date field workflows

Workflows based on date field triggers require that subscribers have filled out a date field on your signup form, such as a birthday or event date. In the **Emails** step, select the field you want to base your sending trigger on from **Start workflow based on the following field**.

Keep in mind that there is no option to send your first email immediately with date triggers and there is a minimum send time of one day between emails. You can choose to set emails to send before and after the trigger date.

- **One-time event** sends to subscribers on a specific date, like the first day of school, an appointment, or a special event. For example, you can send subscribers coupons for school supplies in the days and weeks leading up to the first day of school.
- **Annually recurring event** sends to subscribers on an annual event, such as an anniversary or birthday. For example, you can send a coupon or special offer to a subscriber on their birthday.

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## Goal workflows

Workflows based on [Goal](#) triggers require that the Goal integration is enabled in your MailChimp account and that you place the Goal tracking snippet in your website's code. Emails can begin sending immediately. However, there is a minimum send time of one hour between emails.

- **Website activity** sends to subscribers based on when they complete a specific triggering action, such as visiting a page on your website or viewing a product a certain number of times, to encourage a purchase or other action. In the **Emails** step, you will need to define the number of times a subscriber needs to visit the URL before they meet the sending criteria. This can be done by typing in the number of visits you would like in the **Subscribers visit** field under **Start workflow when the following criteria are met**.

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## Mandrill workflows

Workflows based on [Mandrill](#) email activity send to subscribers when they open an email sent through [your connected Mandrill account](#). For example, you can send a series of homework assignments to subscribers after they open the receipt for the purchase of an online course sent through Mandrill. The first email can send immediately. However, there is a minimum send time of 1 hour between emails.

In the **Emails** step, you can further tailor who receives your workflow by selecting an email tag you've set up in Mandrill so that automation emails send only to MailChimp subscribers who received a Mandrill email with the selected tag *and* meet the automation workflow triggering/sending criteria.

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## API 3.0 workflows

If you're using API 3.0 to integrate your application with MailChimp, the API 3.0 workflow type will allow you to trigger a series of emails via the API. After you create the email series—in the MailChimp app directly or through the API—a list subscriber can be added to the workflow with a call to a provided URL.

Typically, emails in a series are triggered by delay settings based on when a specific subscriber is sent, opens, or clicks in the previous Automation email. These delay settings support API requests as well, so you can trigger an Automation email to a single subscriber based on any custom criteria through the API.

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## Customized workflows

If none of our workflow options quite fit your needs, consider customizing a workflow to help you target subscribers. Customized workflows allow you to create automation emails based a combination of different sending triggers and segments that you select. For example, you can send a series of emails to subscribers when a data value changes, such as a change of address or a name.

Keep in mind that depending on your use-case, certain list fields, [eCommerce360 data](#), [Goal integration](#), campaign reporting data, or a [Mandrill](#) account may be required.

For workflows with signup-based triggers, check **Trigger workflow when subscribers are imported** to include subscribers in the queue who you imported via a list import. This includes [importing](#) from a CSV file or from Excel, and any option on your account's **Import subscribers** page, with the exception of Import Mac Contacts. Integrations from our [Integrations](#)

[Directory](#) use the API and would trigger an automation with or without the **Trigger workflow when subscribers are imported** option being checked.

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## Planning your content

Here are some questions to ask yourself as you're getting started.

### **Will a one-time, targeted message suffice?**

If not, think about how a subscriber will receive your automated emails. Are there too many in the series? How's the pacing? Does the information arrive in the most useful order?

### **Are you targeting the right subscribers?**

A customer may like getting occasional updates about your products, but not want weekly reminders about seasonal items or your current special offers. Consider creating [groups](#) based on the interests of your subscribers—or the frequency at which they'd like to receive your email—and developing workflows that are specifically tailored towards the subscribers present in each group.

### **Most importantly, do your messages sound human?**

The key to a good automated workflow is making sure the content doesn't sound automated.

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# Creating an Automation Workflow

Keep these things in mind when creating your automation workflow:

- [Activity-based workflows](#) are triggered by a subscriber's action. If the subscriber does not trigger the first email, they won't receive any others in the series either.
- Once an automation workflow starts, you can't make changes to the list, workflow type, or email order, because these make up the foundation of your workflow. Changing them would alter the process for subscribers already in the queue. You can add emails to the end of your workflow, or delete emails and workflows.
- For [pay as you go](#) plans, an email credit is used for each email that goes to a subscriber via the automation workflow, including test emails.
- Each automation workflow can contain up to 100 emails. If you need more than 100 emails, you will need to create multiple workflows.

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## Create a workflow

1. Navigate to the **Automation** page and click the **Create Automation Workflow** button.
2. To choose the list that will receive the emails in your workflow, make the appropriate selection from the **Which list do you want to use?** drop-down menu. You'll have the option to [segment recipients](#) later.
3. Find the workflow type you'd like to use, and click **Select**. Available workflows display based on the list you've selected. To use one of the grayed-out workflows, your list needs to meet the indicated requirements.
4. In the **Setup** step, fill out the **Workflow configuration** fields and choose your tracking options. These settings will be applied to all the emails in your workflow. You'll configure each email's settings

- later.
5. Click the **Send activity digest email** check box to receive a [daily email with reporting data](#) for your workflow. Select **Edit** to choose which [account users](#) you want the digest email to send to.
  6. In the **Trigger** step, confirm or customize your trigger and [segmentation options](#). Some triggers require more information from you, others are defaults based on the workflow type you chose on the **List and Workflow** step.
  7. During the **Emails** step, [add and design emails](#), organize them in your workflow, and tell us when each email should send.
  8. In the **Confirm** step, look over the Pre-delivery Checklist and [test your emails](#) if you haven't already. Click **Resolve** or **Edit** to make changes.
  9. When you're finished reviewing, click **Start Workflow**.
- 

## Add and edit emails

Automation workflows can have one email or up to 100 emails. You'll add, design, and organize your emails in the *Emails* step.

### Create an email

1. Navigate to the **Emails** step and click **Add Email**.
2. Some workflow types, like **Annually Recurring Event**, will recommend starting with a specific number of emails and offer the option to add all of those emails to your workflow at once. Keep in mind, however, that you can add or remove emails from your workflow at any time.
3. Click **Design Email**.
4. Fill out the **Email Information**. These fields only refer to the specific email you are editing, not the entire workflow.
5. You can use [automation merge tags](#) in your subject line to automatically display the numbered position of the email within the workflow. If you [reorder your emails](#), the merge tag will update with the new position. The merge tags can also be used in your email content in the **Design** step.
6. During the **Template** step, [choose your layout](#) from Basic templates, Themes, Saved Templates, or Code Your Own. Click **Select** next to the template you want to use.
7. Next, you'll [design your campaign](#) in the Email Designer and click **Finish**.

When you're done creating your email, we'll take you back to the main



**Emails** step, which displays your workflow timeline.

### **Set workflow timeline**

The first email in your workflow will send when a subscriber meets the trigger criteria. Generally, delay times for subsequent emails are relative, meaning they're based on the previous email in the workflow. If you're using an absolute date-based workflow, your delay times will appear on the timeline before and after the trigger date.

1. Navigate to the **Emails** step.
2. Click **Change delay**.
3. Choose when you want the email to go out. Input a number in the first field, and choose **hour(s)**, **day(s)**, **month(s)**, or **immediately**.
4. If you want to apply the same delay to all the emails in your workflow, check the box next to **Apply to all**. The **immediately** option is only available on the **first** email in a workflow.
5. **Save** your changes.

You can **Send a Test Email** or **Save and Exit** from the navigation bar at any time.

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# Reporting

Automation workflow reports are similar to [regular campaign reports](#), except they show complete workflow statistics as well as individual email statistics. To view your automation reports, navigate to the **Reports** page in your account, select the **Automation** tab, and click the **View Report** button. Here, you'll find the overall statistics for the automation workflow. Statistics include **Subscribers who've completed**, which is the number of subscribers who have been sent every email in the workflow, and **Emails sent**, which is the number of individual emails sent out to subscribers who are part of the workflow's queue.

Additional tracking on the **Workflow Overview** page includes the **Monthly Performance** chart, which displays open rate, click rate, and emails sent for the overall workflow. Because the chart is designed to show month-to-month performance, the workflow needs to be active for at least a month before the chart populates with data.

To view the reports for individual workflow emails, navigate to the **Reports** page > **Automation** > **View Report** area of your account, scroll down to the **Workflow Emails** section, and choose **View Report** for the email you want to view.

Many of the stats on the automation email's report are the same as those in a regular campaign report, but there are a few stats that are unique to automation.

- **Delay:** the delay time set for the email
- **Status:** the current status of the email, including how long it's been sending and if it is currently paused
- **Queue:** Number of subscribers currently in the queue. If a subscriber has been sent all the emails in the workflow, they will not be counted as being in the queue.
- **Last Sent:** The last date and time that the email was sent to a subscriber in the queue

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## Viewing stats for deleted automation workflow emails

When an email in a workflow is deleted, we will include its basic reporting data on the automation report's **Workflow Overview** page under **Deleted Workflow Emails**. These stats will help you understand the aggregate stats for the overall workflow.

Once an email is deleted, we no longer hold on to the full email report. Only the stats shown in the **Deleted Workflow Emails** section are available. This includes the day and time the email was deleted, its open and click rates, and the number of times it was sent to subscribers in the workflow's queue.

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## Information in the Activity Digest email

The digest email—when enabled during the **Setup** step of the campaign builder—will include the previous day's reporting data, like the number of emails sent, open and click rates, and the amount of income generated if eCommerce360 is enabled. It will also include the statistics pulled from the total opens, clicks, and sends for the overall workflow.

- **Sent:** The number of emails from the workflow that were sent in the previous day
- **Opens:** The number of times an email in the workflow was opened in the previous day
- **Clicks:** The number of times a link in an email in the workflow was clicked in the previous day
- **New Subscribers:** The number of subscribers added to the workflow in the previous day
- **Completed:** The number of subscriber who completed the workflow in the previous day
- **Bounced:** The number of emails sent in the previous day that bounced

The percentages beneath the **Sent**, **Opens**, and **Clicks** stats in the gray box are based on the percent increase or decrease for the previous day against the overall average for the workflow.

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# Inspiration

Here are a few MailChimp customers we think do a great job with automation.

## Tofugu

Tofugu is a website that teaches users Japanese through an online textbook. [They use automation](#) to help their customers feel great about their progress and stay motivated.

Ho-Lee-Crap.

Bruce Lee was the most intense human being that ever existed, no questions asked.

If you still aren't convinced, [read this article about him](#).

Seriously, how much more awesome can you get? How can you apply this to your Japanese? How can you apply this to your *life*?

If you always put limits on things you can or can't do, you'll never exceed those limits. If you say "I can't learn that many kanji" or "I can't learn all those words," then surely you won't be able to do them.

It's like Henry Ford said: "If you think you can do a thing or think you can't do a thing, you're right."

The same thing goes for Japanese. Can you do it? Sure you can (as long as you decide it to be true).

Cheers!  
Koichi

<http://textfugu.com>

Do Not Want! Please [Unsubscribe](#) me from this e-mail list.

## Skillcrush

[Skillcrush](#) wants to help you learn tech skills through online classes. They use automated emails to send a 10-day getting started bootcamp.

# *skillcrush* BOOTCAMP

DAY  
1

## THE INTERNET VS. THE WEB

*Gooooo Morning,*

*Welcome to Day 1 of Skillcrush's email bootcamp! Are you ready to dive in?*

*Before you start learning about Ruby and JavaScript and programming and all the other fun jargon that techies love to throw around, you need to start with the fundamentals!*

*Here at Skillcrush we love the web. It's creative, exciting, and ever-changing. Always something new and fun in web-land. But did you know that the Internet and the web are not the same thing? Crazy, but true!*

*On that note, let our journey together begin...*



## Museum of Science and Industry, Chicago

[The museum](#) hosts a variety of exhibits, hands-on experiences, and education programs in the Chicago area. One way their team uses automation is to follow a guest's experience in the museum's "Talk to Me" booth.



**Thanks for visiting the Museum of Science and Industry today! The audio story you recorded in the Talk to Me booth is now ready for you online.**

Click the link below to visit your recording's page, where you can play, download and (if you like) share your recordings in a number of ways.

[Visit my recording page](#)



We hope that taking part in Talk to Me was part of a fascinating and reflective time in *YOU! The Experience*. Be sure to visit [msichicago.org/you](https://msichicago.org/you) for online exhibit content that further explores the connection between the mind, body and spirit in the 21st century. You can find a shareable version of the amazing [Make Room for Baby](#) interactive, and web-only activities like the know-your-ingredients game "[Would You Eat That?](#)"

**Thank you again for coming to MSI, and we hope to see you again soon.**

You are receiving this email because you created an audio story in the Museum's Talk to Me booth and asked to receive your story via email. [Unsubscribe](#) or [update your information](#).





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# Education and Support

We hope this guide has helped you as you get started with automation. If you have any questions about automation workflows that weren't covered here, visit our [Knowledge Base](#) or [contact our support team](#).