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# Marketing Automation Starter Checklist

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Use this checklist to launch or optimize your (first) marketing automation programs. Whether you're just getting started or tightening up your flows, these steps will help you move forward with clarity.

## Strategy & Goal Setting

- Define your top 1–2 marketing goals (e.g., lead generation, customer retention, upselling).
- Identify key customer touchpoints (e.g., sign-up, purchase, inactivity).
- Choose 1–2 initial automation flows to build (e.g., welcome series, abandoned cart, post-purchase follow-up).

## Platform Setup

- Select your marketing automation platform (e.g., [ActiveCampaign](#), [Klaviyo](#), [HubSpot](#)).
- Establish optimum inbox deliverability with domain reputation management.
- Connect your website, CRM, and ecommerce tools if applicable.
- Set up core audience segments (e.g., leads, customers, VIPs). This is where it matters! [Need Help? Contact me for a free consultation.](#)

## Build & Launch Your First Automation

- Draft 2–3 emails and SMS messages for your chosen flow. Using WhatsApp with your customers - bring it into the mix here.
- Use behavior triggers (e.g., form submission, link click, inactivity, downloads, purchases) to start automations.
- Set up timing rules (e.g., send 1 hour after signup, wait 2 days between messages).
- Test your automation from start to finish before launching.

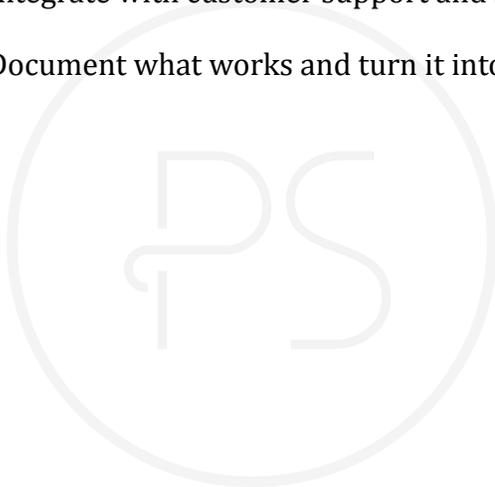


## Measure & Optimize

- Review open, click, and conversion rates weekly.
- Run A/B tests on subject lines and call-to-actions. But ONLY test one thing at a time per asset for actionable results!!
- Refine segments and messaging based on performance data.

## Ready to Scale

- Start simply and layer in complexity. More automations, deeper segmentation, CRM stages, re-engagement campaigns, VIP rewards.
- Integrate with customer support and sales teams for a unified journey.
- Document what works and turn it into repeatable playbooks.



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