



Workflow Automation Template Guide

By Perry Sheraw, Email Marketing Automation Specialist and CEO at Duma, LLC

These pre-built workflow templates are designed to help you launch or optimize high-impact marketing automation flows. Customize them to fit your brand, product, and customer journey.

1. Welcome Email Sequence

Trigger: New subscriber or form submission

- Email 1 (Immediate): Thank-you and intro
- Email 2 (Day 2): Brand story or value proposition
- Email 3 (Day 4): Testimonials, reviews, or FAQ
- Optional: Special offer or discount (Day 5–6)

2. Lead Nurturing Drip

Trigger: Downloaded resource or visited key pages

- Email 1: Educational content (e.g., blog, guide, video)
- Email 2: Personal story or customer case study
- Email 3: Soft CTA (e.g., book a call, watch a demo)
- Email 4: Strong CTA with clear next step

3. Abandoned Cart (or Form) Recovery

Trigger: Cart abandoned (no checkout in 1 hour)

- Email 1 (1 hour): Reminder and saved items
- Email 2 (24 hours): Social proof or urgency
- Email 3 (48–72 hours): Incentive (e.g., discount or bonus)

4. Re-Engagement Campaigns

Trigger: Inactive for 60–90+ days

- Email 1: “Still interested?” or reactivation message
- Email 2: New offer, free content, or incentive
- Email 3: Final notice (remove or stay on list)



5. Post-Purchase Follow-Up

Trigger: Completed purchase

- Email 1: Thank-you + order summary
- Email 2 (2–3 days later): Product tips or support links
- Email 3 (1 week): Ask for review or referral
- Optional: Upsell or loyalty program offer

6. Win-Back Campaigns

Trigger: No purchase after 60–120 days

- Email 1: “We miss you” message with soft tone
- Email 2: Personalized reminder of last order
- Email 3: Incentive to return (e.g., discount or bonus)

7. Lead Scoring & Sales Handoff

Trigger: Contact score crosses threshold

Actions:

- Tag contact as 'Sales-Qualified Lead'
- Notify assigned rep via email/Slack
- Start follow-up sequence or calendar link CTA