7 Step Checklist for Automation

1 Sketch your sequence & determine the segment you need: Practice sketching out the user journey you want your user's to go through.

Draw the stages and make a note of where you will need filters to pull in data, emails, lists, etc. Define the end goal or overall goal of the program. Is it to automate a manual process? To drive leads to an event?

📦 Checklist example for what you will need to build:

i Create each email campaign and publish the campaigns to be ready for automation

ii Create a filter containing the criteria that will trigger your automation. (Example: Paid thru date equals XX/XX/XXXX).

iii Apply your filter to your list via a dynamic list to create the data input for your automaton. Scheduling this dynamic list at a certain time will be the initial launch of the first email in your automation if you are starting with an email send..

iv Consider creating any filters to trigger based on engagement or behavior (i.e. has clicked any of my member onboarding emails).

Build out your components

2 **Organization:** Consider creating a separate project folder specific for your program where all the emails for the automation program will be stored. (This will help with filtering and reporting later.) It might be useful to tag everything in your automation program with a tag for easy searching later. For example tag with 'onboarding" or "welcome" on all emails, lists, filters, etc.

3 **Build emails for automation:** When you create an email for automation it is mostly the same process with only a few new steps. First you will still need to assign a list ot the email; however, this list will be trumped by any list you assign to the automation. So, you could assign a test list to the email, but in the end this list won't be used. Next, on the 4th stage of test and launch where you normally manually schedule the email to go out, you will instead tab over to "Publish only". On the Publish only tab, click to Publish campaign. *Note: anytime you go back to revise an email in an automation sequence that is already published, you will NEED to republish the email campaign to populate the changes for your automation program.*

4 **Data & Segmenting:** In the very first step of setting up an automation program, we advise you to start with a segment in mind. Starting with a segment of a population in mind that you are wanting to receive your automated communications will help determine that you have the right fields or lists to be able to trigger into the program. Build out any filters to apply against a list and build your dynamic list for assigning to the program. *Note: If you create a dynamic list that is comprised of the "All Customer" list in your integration and a filter of (join date) and there are people already populated on that list, and you are wanting the folks already populated on that list to go through the program, you will need to manually add those people ONE time to the automation. Next, you will also need to Schedule the list to "wake up" each day to run again against your filter criteria for folks to be triggered into the automation program. Scheduling your dynamic list (found on the set-up page of the list) is essentially scheduling your first email in the program.*

Build your Automation/Program:

5 Now that you have your emails built, your filters set up, your lists created, you'll have a good base to start pulling in the elements into your automation program. Use the sketch from initial planning to build out the stages and branches.
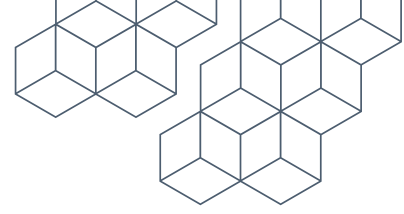
Supporting links:
Stage Types
Using the program builder
Example Welcome Program Video

Testing & Launching:

6   **Final steps:**

i   As you have build out your program and the journey looks correct, **save** your work. *Each time you save your work you create a history of earlier versions you can revert back to in case you need to go back a few steps to an earlier version.*

ii   Once you have saved and you are done with making changes, **publish** the automation program.

iii   Once an automation program is published, **input your data**. Go into your dynamic list (with the filter applied and schedule set), tab over to "Associate Program" to choose the automation program to associate the list with.

iv   Once you have saved and published your program, there is one final step; to activate. Choose to **activate** in the top right area of the workspace. *The activation link is essentially the play and pause button for the automation to begin and stop.*

v   Note: If your dynamic list starts with data already in the list, you will need to **manually push data** one time for those contacts to receive the automation. Head over the the dynamic list, tab over to browse, choose to add the contacts in your list to the program.

7   **Report & Monitor:**

i   Make a point to check early after you first launch and again on a weekly or regular cadence.

ii   Either review the contact count at each stage of the program, the input tab to see where contacts are at what stages, or the reporting tab and your project folder for aggregate reporting.