



Maximize effectiveness.

Marketing automation workflows every marketer should know.



What is a marketing automation workflow?

It's a set of automated actions you set up to respond to certain customer behaviors or external events. Companies with strong marketing automation processes may have workflows for many new subscribers, new customers, new qualified leads, and more.

What are your marketing automation goals?

Successful marketing automation requires clear, measurable goals:

- More sales-qualified leads
- Shorter, more efficient sales cycles
- More conversions and sales
- More engaged customers
- More cross-selling and up-selling
- Better measurement of marketing

Get to know some common marketing automation workflows.

Turn prospects into leads.

Welcome your new subscriptions.

Trigger: A new user subscribes.

Result: A series of onboarding emails appears with helpful resources.

Share related resources with new users.

Trigger: A user downloads a gated resource on a certain topic.

Result: A message goes out with related resources or next steps.

Bonus: If the user continues to explore more content, they become a warm lead.

Turn leads into customers.

Quickly follow up with "hot leads."

Trigger: The user's lead score reaches "hot lead" status after viewing a certain resource.

Result: Sales is automatically notified to reach out.

Send personalized content to your ideal leads.

Trigger: Someone in your ideal industry or target role fills out a form.

Result: A follow-up message goes out with content specific to their industry or role.

Bonus: Sales can reach out personally with special industry offers.

Recycle leads and try to convert them in the future.

Trigger: A lead is marked as closed or lost in the CRM.

Result: The lead is routed back to your nurture process to pursue in the future.

Bonus: Unique workflows are set up for different loss reasons, such as "chose a competitor," "no decision," and so on, so your nurture campaign is highly relevant.

Encourage lost contacts with product updates, special offers, and so on.

Trigger: The user's lead score reaches "hot lead" status after viewing a certain resource.

Result: After a few months, a product update or special offer goes out to get them to reengage hopefully.

Reengage subscribers who aren't opening your emails.

Trigger: A subscriber hasn't opened emails or visited the site in six months.

Result: A personalized email goes out saying that you miss communicating with them.

Bonus: If they don't reengage, they are offered to be removed from the email list.

Turn people into highly engaged customers.

Onboard new customers consistently.

Trigger: A new customer purchases your product or service.

Result: A series of guides, manuals, and tips for using the product goes along with the purchase.

Promote your special events.

Trigger: A special company event is coming up.

Result: Prospects are invited to the event with promotions for special sessions, public events, and so on.

Bonus: Likely attendees (from a specific location or niche) are added to a special list so sales can follow up personally.

Drive "stuck" users to new solutions or to customer service.

Trigger: A user or prospect isn't using the product fully because of a technical problem or product issue.

Result: A personal invitation goes out for the user to try a new solution or contact customer service.

Remind customers of upcoming purchases or renewals.

Trigger: A customer's automatic payment or product renewal is coming up in one month.

Result: A reminder message goes out about the upcoming payment or renewal.

Send exclusive offers or insider info to your most loyal customers.

Trigger: A customer reaches a significant milestone (such as years with the product, features used, "loyalty score" achieved).

Result: A special offer or inside information is shared with the customer as a reward for their loyal business.

Nudge customers to try other parts of your product.

Trigger: A current user has tried only one or two parts of your product.

Result: A reminder message goes out about other features they haven't yet explored.

Ready to put these workflows into practice?

Discover how Adobe Marketo Engage can help you maximize the value of your marketing budget—at each stage of the buyer's journey.

[Get details](#)

