

# Mailchimp Automations – Implementation Checklist

Email marketing reaches its full potential not when you send as many newsletters as possible, but when each message is sent at the right time, to the right person, and with a clear goal.

## Prerequisites for working Mailchimp automations

### Mini setup check before you start:

- ☒ The goal of the automation is clearly defined (e.g. first purchase, reactivation, or retention).
- ☒ Contacts are cleanly structured, for example via tags or segments.
- ☒ The triggering event is clearly defined.
- ☒ Double opt-in is activated and properly implemented.
- ☒ A test contact is available.
- ☒ The sending domain is authenticated.

## The most important Mailchimp automations explained step by step

### 1. Welcome automation – the most important first impression

#### Typical flow:

- ☒ Sign-up triggers the automation
- ☒ First email welcomes the contact and clearly communicates the value
- ☒ Short pause to avoid overload
- ☒ Second email delivers real value, such as a guide or tip
- ☒ Another short pause
- ☒ Third email invites the contact to a specific action
- ☒ Optionally, an activity tag is set

### 2. Abandoned cart automation – recovering lost sales

#### Typical flow:

- ☒ A filled cart without a completed purchase triggers the flow
- ☒ Short waiting period
- ☒ First reminder with a clear value argument
- ☒ Another pause
- ☒ Second email addresses typical objections
- ☒ Optionally, a gentle incentive follows
- ☒ The flow then ends or a segment is set

### 3. Occasion and birthday automations – personalization with impact

#### Typical flow:

- ☒ A defined date triggers the email
- ☒ Personal message combined with added value
- ☒ Optionally, a segment is updated

#### **4. Follow-up and reactivation automations**

##### **Typical flow:**

- ☒ Inactivity over a defined period triggers the flow
- ☒ First email reaches out in an appreciative way
- ☒ Short waiting period
- ☒ Second email offers a clear decision
- ☒ Segment is adjusted accordingly

#### **Common pitfalls with Mailchimp automations**

##### **Mini check (max. 7):**

- ☒ Missing segmentation
- ☒ Unclear or incorrect triggers
- ☒ Too many emails in the flow
- ☒ No test run before launch
- ☒ No evaluation of results
- ☒ Too early sales focus
- ☒ No clear goal per automation

#### **Which Mailchimp plans do you need for automations?**

- ☒ Free plan: Simple automations, heavily limited.
- ☒ Paid plans: More complex flows, better segmentation.
- ☒ Costs increase with the number of contacts – plan automations strategically.

#### **Combining Mailchimp automations effectively – with forms & funnels**

- ☒ Structured forms and funnels help trigger automations cleanly and build segments correctly from the start.

#### **Frequently asked questions about Mailchimp automations**

- What can I automate with the Free plan?
  - ☒ Simple linear flows. Complex logic is limited.
- How many automations make sense?
  - ☒ A few well-maintained automations.
- Can I test automations?
  - ☒ Yes, using test contacts and preview functions.

- How do I measure success?
  - ☑ Through opens, clicks, conversions, and unsubscribes per flow.
- Who is Mailchimp especially suitable for?
  - ☑ Teams that want to start in a structured way and expand automations strategically.

## **Conclusion**

- Successful email marketing does not come from having as many automations as possible, but from clear goals, clean triggers, and regular evaluation.
  - Build your system step by step, optimize deliberately, and give your automations the time to work for you.