

# **Marketing Automation course & 35 automation ideas**

**user.com**

# **Marketing Automation course & 35 automation ideas**

# Index

<b>What is Marketing Automation?</b> .....	<b>3</b>
Triggers, conditions & actions	
<b>Popular mistakes</b> .....	<b>6</b>
<b>Best practices</b> .....	<b>9</b>
<b>Useful concepts</b> .....	<b>11</b>
User attributes	
Personalization snippets	
Events	
Event snippets	
Tags, lists and dynamic segments	
<b>Marketing Automation ideas</b> .....	<b>17</b>

This ebook is an introduction to Marketing Automation. It ought to give you an overview of how the work with automation looks like.

When most people think about MA, they imagine email marketing.

But there is much more to automate.

Depending on your knowledge level you can read the first introductory slides, or just skim through them and check out my automation ideas.



Andrzej Pacholik   
Digital marketing specialist



Denis Kharchenko   
UI Designer

# What is Marketing Automation?

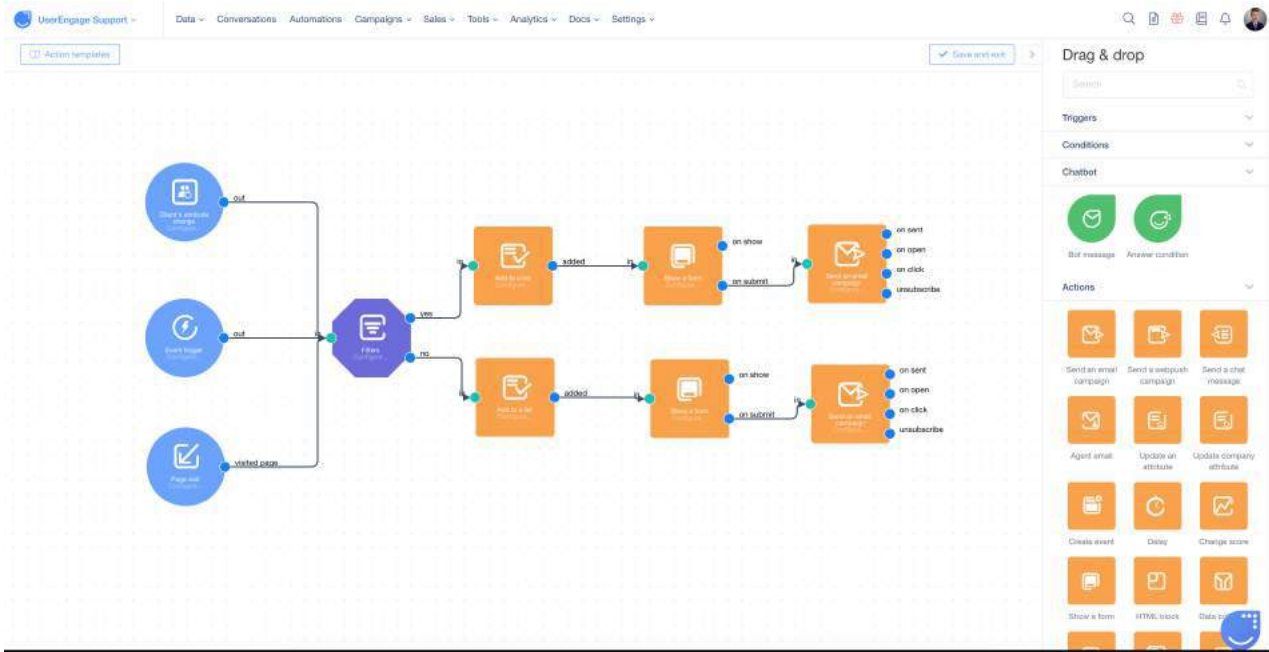
Marketing Automation is a set of techniques that allows businesses:

- save time and increase efficiency by automating repetitive tasks,
- engage and deliver information to people just in the right time,
- personalize communication with customers at scale.

All of that results in improved business metrics like [lower costs](#), [higher conversion rates](#), [LTV](#), [ROAS](#) etc.

To automate processes you need software that tracks users' behavior and, based on specific rules you define, performs some action. Such an action can be almost everything - from showing a pop-up or sending an email, through deal management and user segmentation, to sending information to other systems, e.g., about micro conversions.

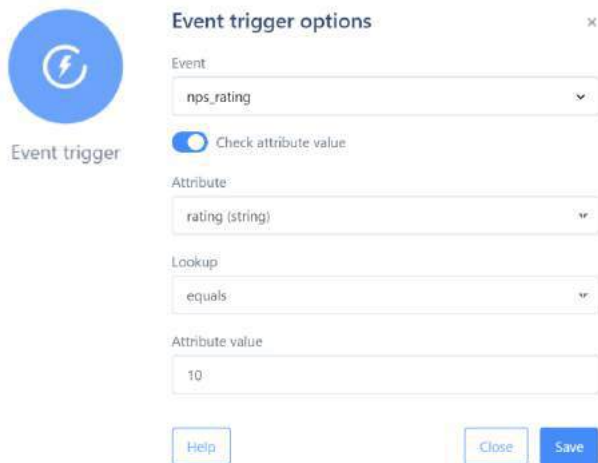
To create automation paths you [just drag & drop](#) so-called automation modules and link them together (see the image on the next page). Automations usually consist of trigger, condition and action modules.



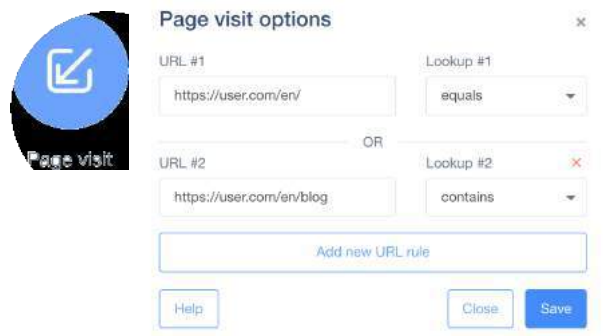
To get you fast on track, below you can see examples of how automation modules look like inside.

## Triggers, Conditions & Actions

### • Triggers

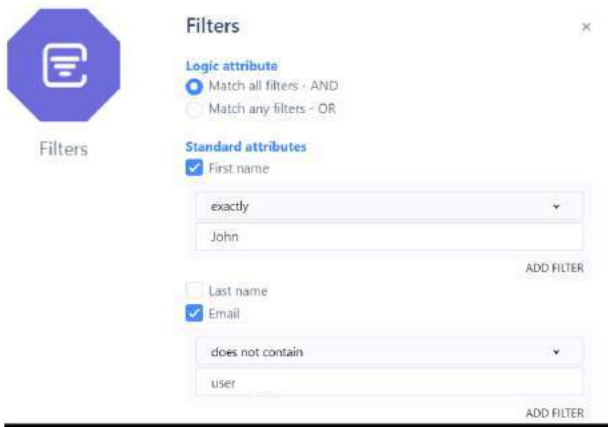


It starts an automation when the nps\_rating event is sent, along with the attribute rating of value 10.

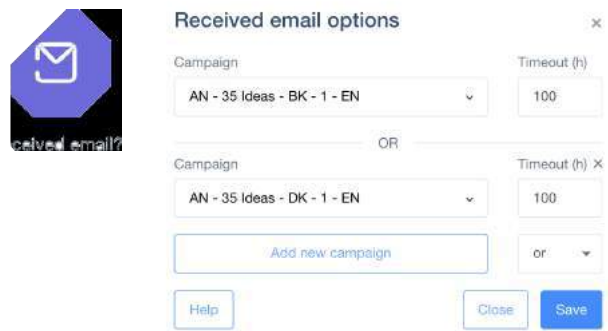


It starts your automation when a person visits one of the two listed pages.

• Conditions

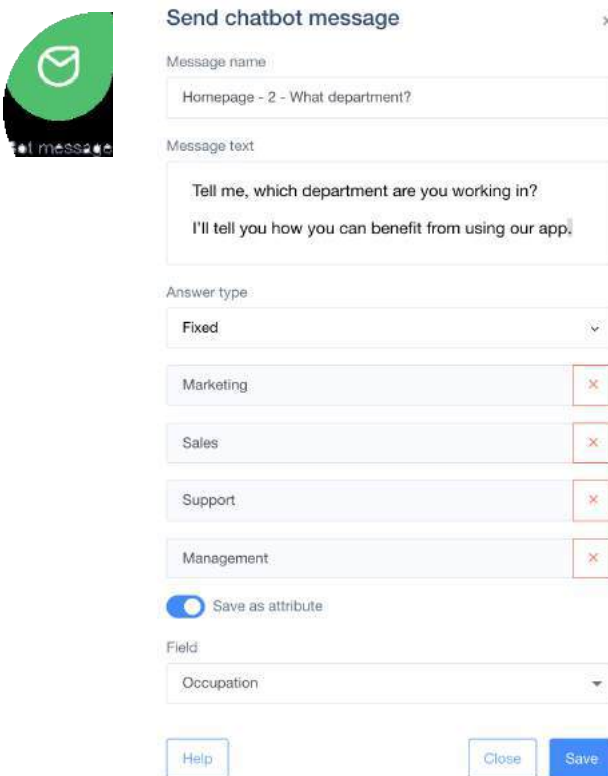


It lets your automation run only for people whose name is John AND whose email address doesn't contain user.com.

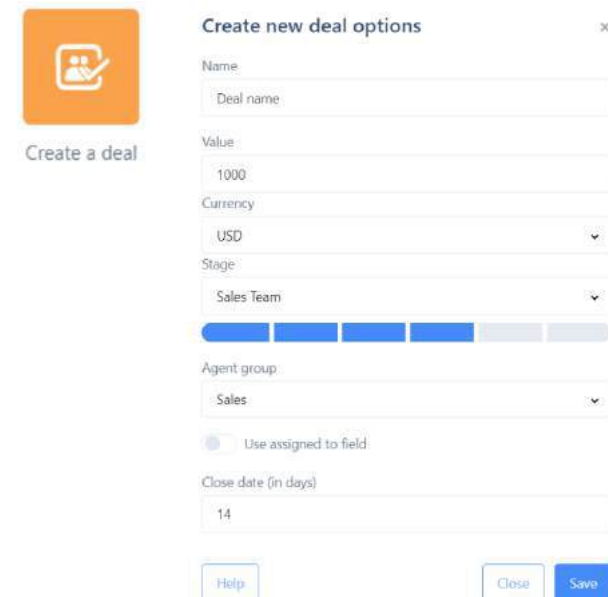


It filters out people who received one of those two emails within the last 100 hours.

• Actions



It sends a chatbot message with the four answer buttons and saves the chosen answer in the Occupation attribute.



It creates a deal of value 1000\$, that is on the Meeting agreed stage and is assigned to the Sales Team group. The deal will be closed in 14 days.

# Popular mistakes

## Popular Marketing Automation mistakes

### 1. Weak lead generation strategy

Many businesses get caught in a trap here. With MA being so trendy, people started to believe that it can resolve all their marketing problems. But it's simply not true.

To fully benefit from using Marketing Automation you need to have a quality traffic coming to your website. If you're attracting a wrong audience or not attracting enough people at all, money spent on MA software will partly go down the drain and your ROI will not be satisfactory.

### 2. No segmentation

The biggest advantage of MA is being able to deliver the right message, in the right time, to the right people.

If you don't split your visitors, leads and customers into segments, you're likely to be sending messages that don't align with recipients' interests or awareness levels.

Again, such an approach will result in far lower ROI than possible.

### 3. Automating only emails

When most people say marketing automation they imagine emails. I don't blame them. It's a great start.

But you surely use other ways to interact with your leads and customers too. Why would anything keep you from automating chat and text messages or making your website adjust to each visitor?

Multi-channel communication is what automation is made for. Don't waste such a chance.

### 4. Using MA only for marketing purposes

Despite it's marketing automation, it can be used to help sales team as well.

Automatic lead scoring and qualification, alerts, deal management or assigning tasks are just a few examples of how it may streamline work of your sales reps.

### 5. Using too many tools

At some point the number of automated processes will become big. And it's a good thing. It means that you start to use MA to its full potential.

However, if you use many systems for different purposes, you may face problems with its management. Integrating it all and keeping your communication consistent can become too hard to avoid mistakes.

## 6. Sending too many messages

If you're new to MA it's easy to become too eager to automate.

So before creating your next automated email, push or SMS campaign stop and think if it's not too much.

## 7. No checkups

You've created your automation and it's working. Should you leave it alone?

Please don't, it's the worst thing you can do. Why?

There are at least two reasons for for doing checkups and minor tweaks:

- if you don't analyze results and run A/B tests you miss an opportunity to improve,
- it may happen that something changes, e.g., on your website and your automation stops working.

# Best practices

## Marketing Automation best practices

### 1. Have a strategy

Before jumping into your automation editor spend some time on preparing a strategy. Once you have it all written down it will be a lot easier to deliver results.

- Define your goals.
- Come up with several ideas on how to achieve them.
- Map your automations to different segments and stages of your sales funnel.
- Check if your plan is consistent across all channels.

### 2. Automate communication in omnichannel

Customers got used to interacting with brands in various channels. And each of them serves a slightly different purpose.

Use all channels complementarity to nurture your leads and provide the best customer experience possible.

Thanks to automation it's far less time-consuming and every company can do it.

### 3. Collect as much data as possible

Collecting data is crucial. It lets you trigger automations in the right time and personalize your lead's or customer's experience.

- Make sure you track each visitor's behavior.
- Ask for tiny bits of personal information whenever possible.

One of my favourite techniques is to add an additional, unique class to each form on your website. Then, using dynamic page content you can change fields in form on-the-fly to ask for the piece of information you don't have yet.

- If possible, enrich your data from external sources such as social media.

### 4. Let marketing, sales and support cooperate

Marketing automation should serve your business and not the marketing team.

Make sure marketing, sales and support teams work closely together on your automation strategy.

### 5. Personalize everything

I can't stress this enough. The right message, in the right time, to the right people. Remember that.

### 6. Make sure you track results

As every other marketing activity your automations should benefit your business. Don't rely on your gut feeling. Track and analyze their performance instead.

# Useful concepts

## User attributes

As soon as a visitor comes to your website you can start collecting various pieces of information. One of the places to store them are user attributes.

These pieces of information can be anything. Things like name, location, device, number of page views or first and last visit dates are called [basic attributes](#).

Although they are important, they are usually not enough for automation or analysis purposes.

That's why you can create your [custom attributes](#), where you'll store information specific to your business.

Attributes not only equip you with information but are also useful in:

- Automations - you can filter users who meet specific criteria,
- Communication - you can add attributes in emails, chat messages, push notifications etc. to make your messages personalized.

Basic	
<b>First name</b>	<b>Phone number</b>
Andrzej	668181351
<b>Last name</b>	<b>Referrer</b>
Pacholik	Leads - Remarketing
<b>User id</b>	<b>Page views</b>
7c2f98ec214dd0b750db2aa9214f9dc1	35091
<b>Email</b>	<b>Ip address</b>
<a href="mailto:apacholik@userengage.com">apacholik@userengage.com</a>	95.215.52.18

## Personalization snippets

Personalization snippets are the pieces of code that allow for using data stored in attributes in your communication.

It's thanks to them that you can add, for example,:

- recipients' names in your emails,
- visitors' cities in a title of your landing page,
- the number of points in your loyalty program messaging,
- the topic of the last attended webinar.

Below you can see how using personalization snippets looks like in practice.

*Note:*

*Names like `last_loyalty_points` or `all_loyalty_points` are the custom attributes you need to create and fill with data prior to using them in messages.*

<p style="text-align: center;"><b>Hi <code>{{ receiver.first_name }}</code>!</b></p> <p style="text-align: center;">You've just earned <code>{{ receiver.last_loyalty_points }}</code> points!</p> <p>Having <code>{{ receiver.all_loyalty_points }}</code> points on your account, you've almost reached our Gold Customer status.</p> <p>Spend <code>{{ receiver.purchase_value_to_gold }}</code> more and you'll receive <b>20% permanent discount</b> valid till the end of this year.</p> 	<p style="text-align: center;"><b>Hi Mike!</b></p> <p>earned 375 points!</p> <p>you've almost reached our Gold Customer</p> <p><b>0% permanent discount</b> valid till the end of</p> 
--	--

## Events

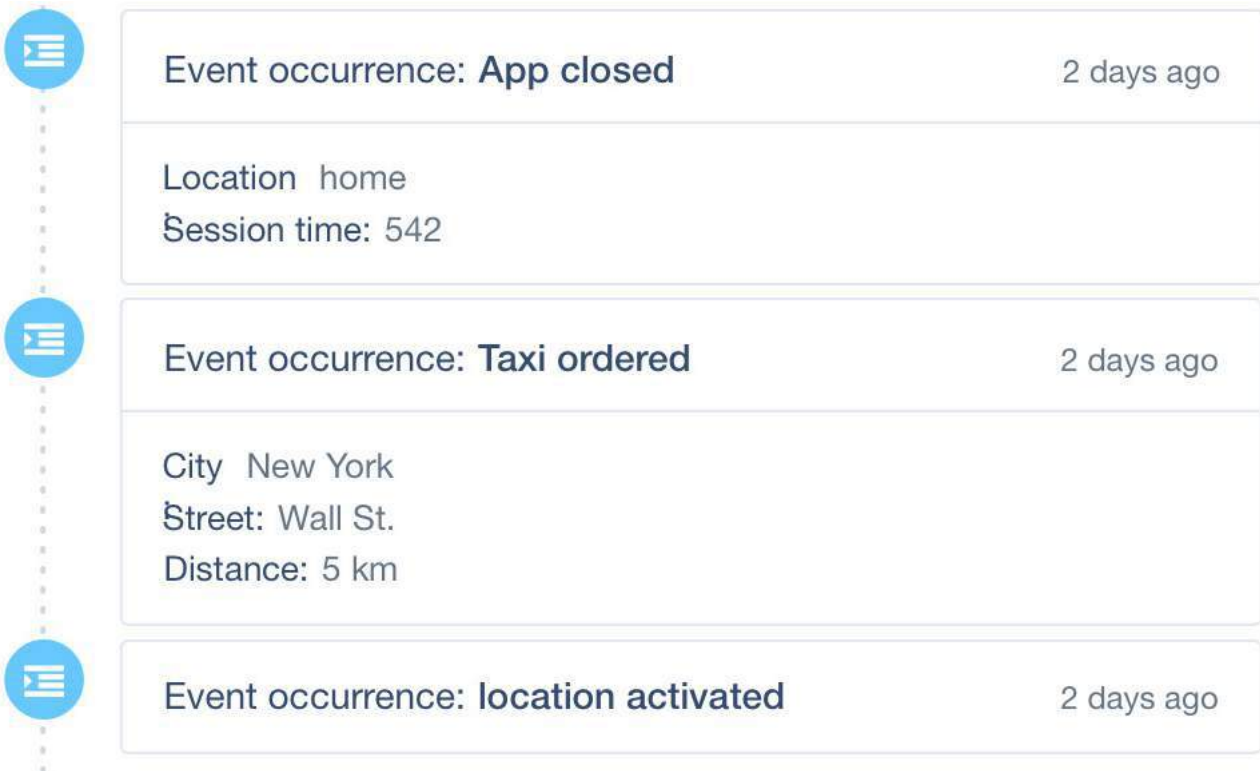
Events are probably the most important tool when it comes to automation. They are pieces of code that you send to User.com app, or any other automation software, when something like a mouse click, purchase, or anything at all, happens.

Firstly, events are useful as a mean of storing information. As opposed to user attributes that are updated every time something happens, events can be sent multiple times and never change information they carry. That's because each time an event is sent, a new record is created.

Secondly, thanks to events you can trigger your automations at any interaction with your website or in other systems you use, e.g., when a Facebook Lead Ad is submitted (usually you will need to use a tool like Zapier though).

Events consist of a name and event attributes (see the image on the next page). It's in these attributes that you store information about, e.g., purchase values, descriptions etc.

When it comes to User.com, there are several ways to send an event - you can do it right within our automation panel, using our API or some third-party services like Google Tag Manager or Zapier.



- Event occurrence: App closed** 2 days ago  
Location: home  
Session time: 542
- Event occurrence: Taxi ordered** 2 days ago  
City: New York  
Street: Wall St.  
Distance: 5 km
- Event occurrence: location activated** 2 days ago

## Event snippets

There are situations when you may need to include event data in your messages. To do that you need to insert a piece of code that will be dynamically transformed into a proper text when the message is sent.

Event snippets can be useful to send, e.g., [abandoned cart recovery emails](#) or emails with information users submit in a form.

In User.com, we've prepared a special generator to let you get the code you need, without having to ask your IT department.

Oh Gabrielle, it seems you've left something in your cart!

Oh {{ receiver.first\_name }}, it seems you've left something in your cart!

Did you know you will get it within 24 hours if you complete your purchase now?

{% events 'add\_to\_cart' for\_last\_days=1 count=3 order=-1 as event\_occurrences %}  
{% for event in event\_occurrences %}

W: {{ event.weight }} sku: {{ event.sku }}

---

{{ event.quantity }}
+ Add

{% endfor %}

Go to your cart

## Tags, lists and dynamic segments

Customer segmentation is essential to personalize your communication in an automated way. Group your contacts based on their interest, engagement, loyalty etc. and use filtering modules to execute actions only for a specific customer segment.

## 1. Tags and lists

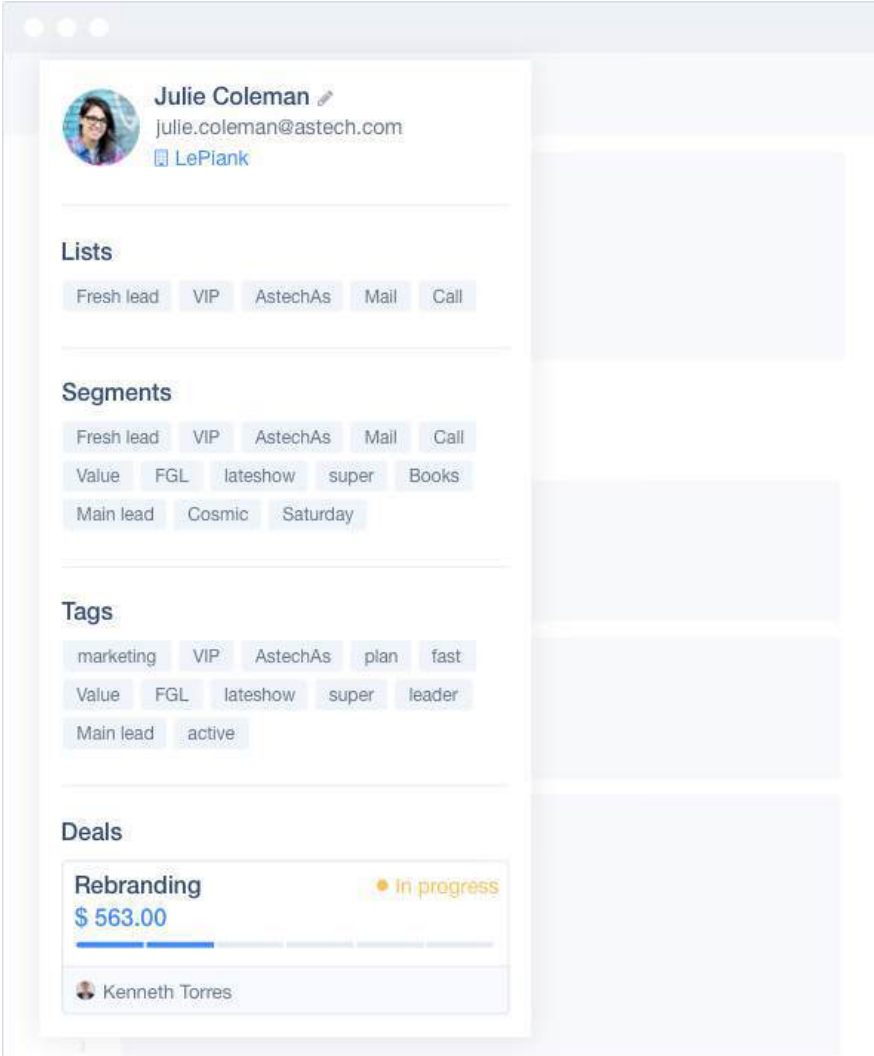
These two are very similar in nature but usually serve different purposes.

Lists are usually used to group people in terms of communication they receive (like newsletter or webinar lists).

On the other hand, tags are great to distinguish some people from others, or as a way of excluding them from automation paths.

## 2. Dynamic segments

Dynamic segments work like saved filters. Thanks to that, people are not added to these segments forever but belong to them only if they meet specified criteria.



The screenshot displays a CRM profile for Julie Coleman, including contact information and various filters for Lists, Segments, Tags, and Deals.

**Julie Coleman**  
julia.coleman@astech.com  
LePiank

**Lists**  
Fresh lead VIP AstechAs Mail Call

**Segments**  
Fresh lead VIP AstechAs Mail Call  
Value FGL lateshow super Books  
Main lead Cosmic Saturday

**Tags**  
marketing VIP AstechAs plan fast  
Value FGL lateshow super leader  
Main lead active

**Deals**  
Rebranding ● In progress  
\$ 563.00  
Kenneth Torres

# 35 Marketing Automation Ideas

## Chapter 1: Lead generation



### How User.com helps in: Lead generation

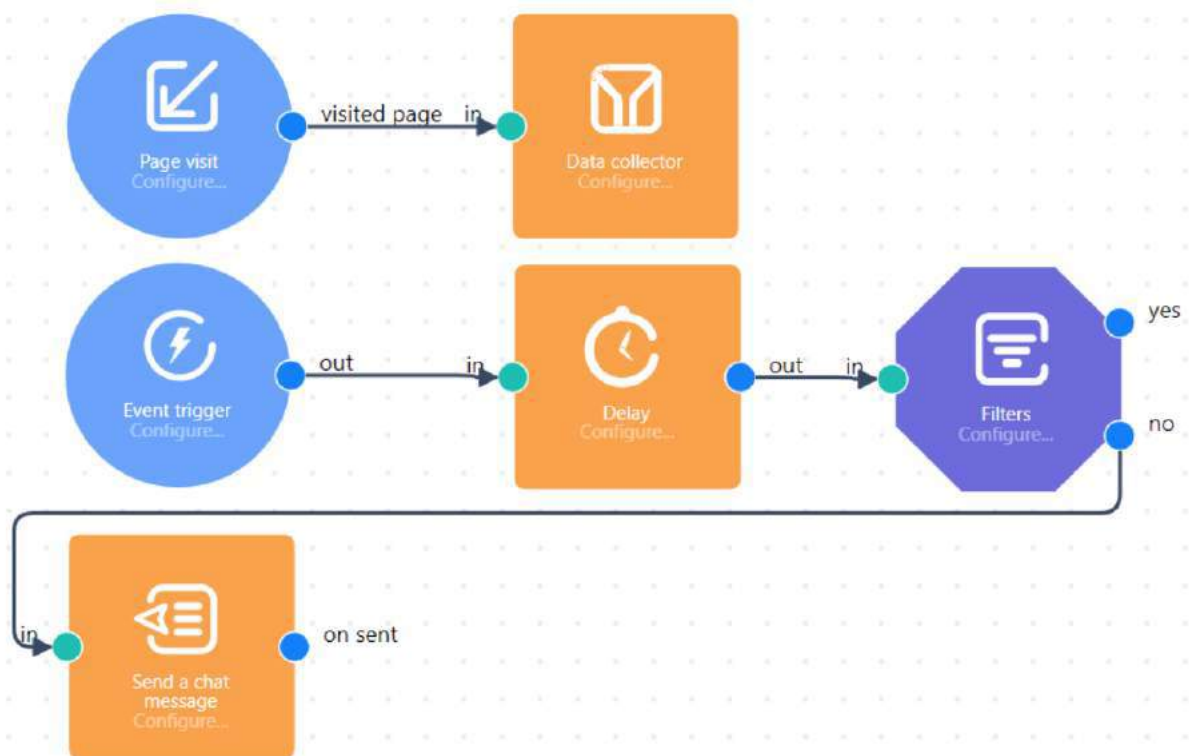
- Thanks to User.com you can collect a lot of information about your visitors.
- It lets you improve targeting and personalize your communication with visitors.
- This way you provide them with an exceptional experience and adjust your content or offer to their needs.
- Finally, you collect contacts through pop-ups, an email form on chat and using chatbot.

**#DataManagementPlatform #Trageting #Personalization  
#Pop-ups #LiveChat #Chatbot**

[Learn more about User.com](#)

## Chat message to users who stopped filling out a form

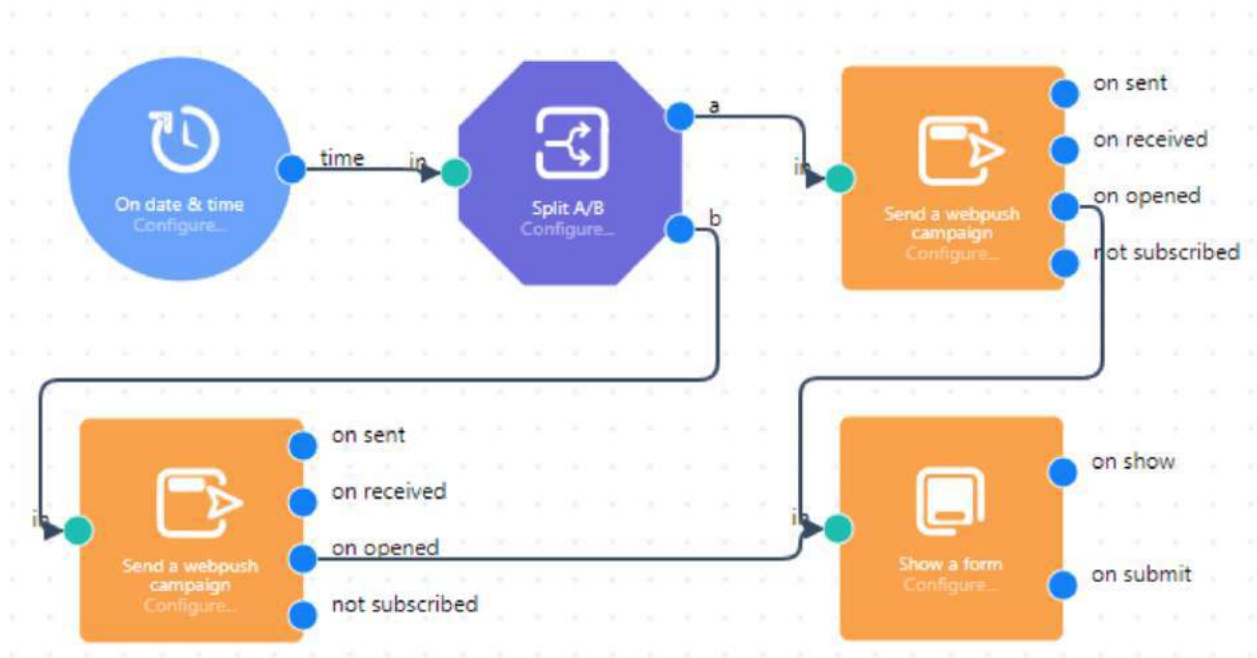
Many users might have trouble filling out a standard form, especially when it's particularly long. Thanks to this automation you will be able to ask if the user needs any help.



- **Step 1: Page visit**  
Type the URL of the page with the form.
- **Step 2: Data collector**  
Use the Data collector tool to send an event when a user clicks on the first field in your form.
- **Step 3: Event trigger**  
Use the above mentioned event to start the second path.
- **Step 4: Delay**  
Wait e.g. 90 seconds.
- **Step 5: Filters**  
Check if the user has filled the form or not.
- **Step 6: Send a chat message**  
Send an automatic chat message offering your help.

## Boost subscriptions with A/B tested notifications

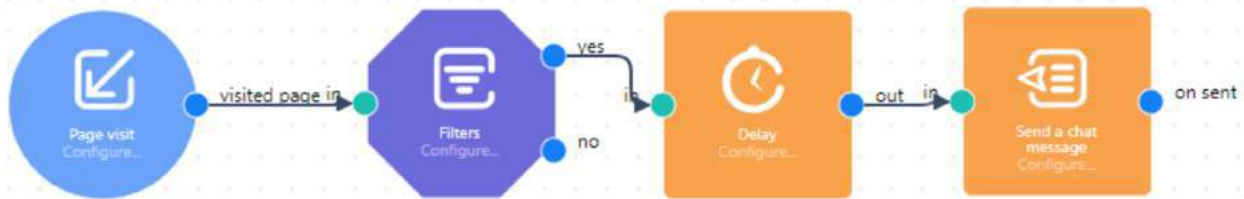
Using many communication channels increases the chances your audience will get your message. Here's how you can ask your push notification subscribers if they didn't want to subscribe to your email newsletter.



- **Step 1: On date & time**  
Set the time your users are most active and make it repeat every week.
- **Step 2: Split A/B**  
Divide your audience into two parts to carry out an A/B test.
- **Step 3: Send a web push campaign**  
Send two different web push messages to different sets of people to see which performs best.
- **Step 4: Show a form**  
Show a pop-up asking to sign up for your newsletter.

## Invite visitors to a Skype call

Whenever a visitor shows sufficient engagement you shouldn't let them go without appropriate support. Skype meeting invitation will make them feel important and will allow for creating a closer bond with the potential customer.



- **Step 1: Page visit**

Choose the page that indicates that the visitor is engaged more than an average person.

- **Step 2: Filters**

Send a message inviting to for a call.

- **Step 3: Delay**

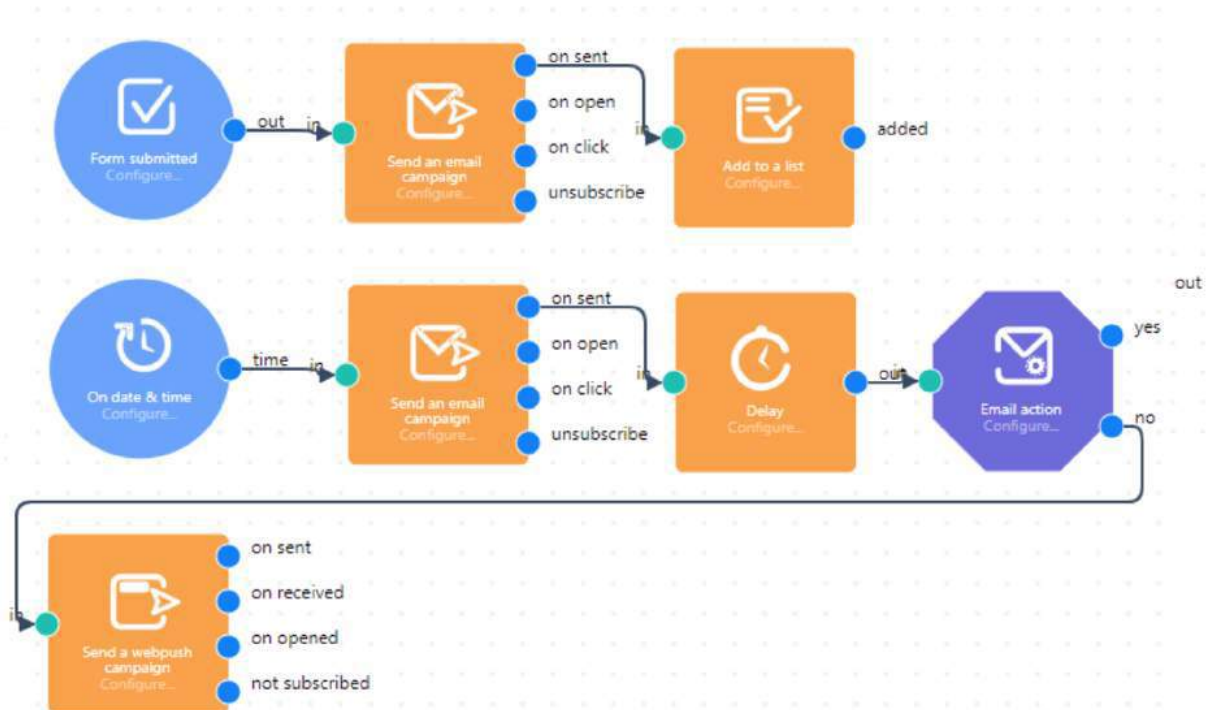
Set up the time that needs to pass before sending a message (let the user get familiar with the content of the page).

- **Step 4: Send a chat message**

Check if the user left an email address in provided time.

## Webinar flow

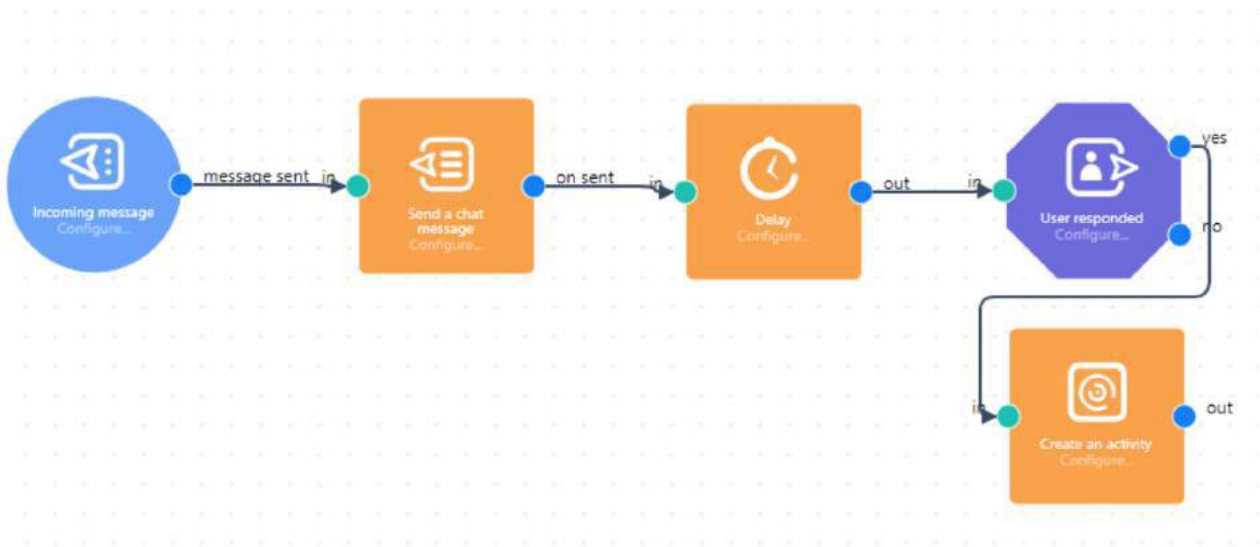
This action lets you automate the entire workflow around signing up for a webinar, along with lead management and reminders.



- **Step 1: Form submitted**  
Choose your webinar signup form.
- **Step 2: Send an email campaign**  
Send a confirmation email thanking for signing up.
- **Step 3: Add to a list**  
Add the user to a webinar reminder list.
- **Step 4: On date & time**  
Trigger the action an hour before the webinar.
- **Step 5: Send an email campaign**  
Send an email saying that the webinar starts soon.
- **Step 6: Delay**  
Wait 55 minutes.
- **Step 7: Email action**  
Check if the user has opened the reminder email.
- **Step 8: Send a web push campaign**  
Send a notification to users who hasn't opened your email.

## Chat message at night

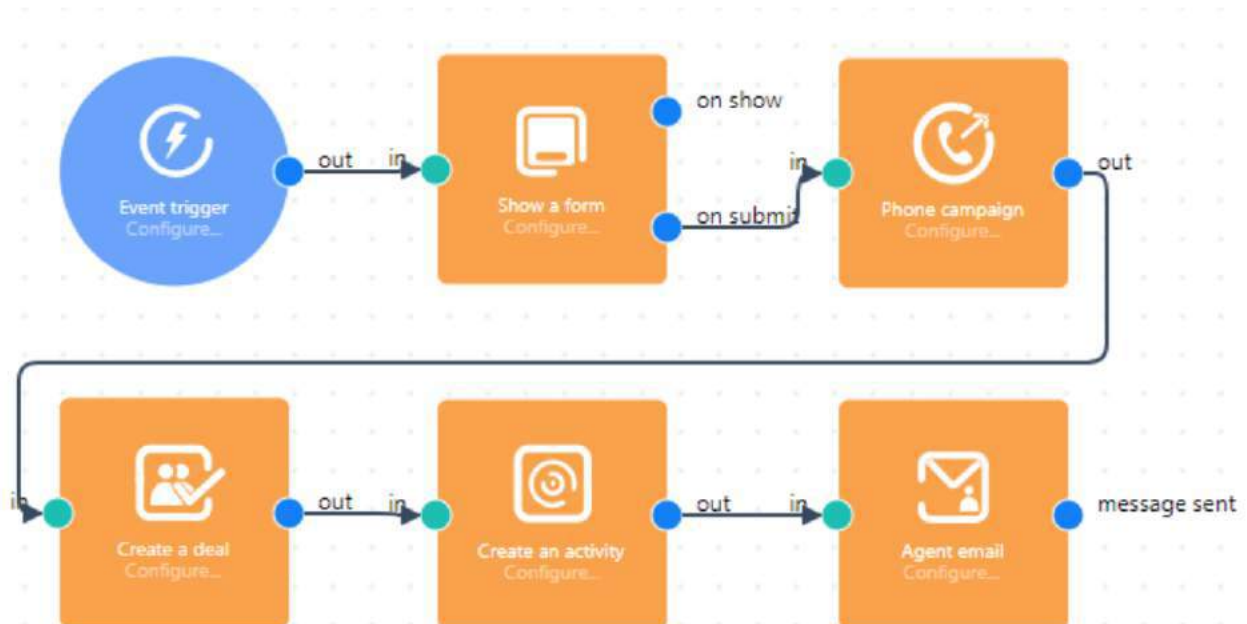
It happens that visitors want to interact with a support agent while nobody's available. To show them you care, just set an automated reply with the promise of contacting the shopper in the morning, if only they leave their email address.



- **Step 1: Incoming message**  
Choose chat as the incoming message type.
- **Step 2: Send a chat message**  
Create a message asking people for their email addresses to answer them when you will be available.
- **Step 3: Delay**  
Set up what time needs to pass before checking if the user has responded (usually 20s).
- **Step 4: User responded**  
Check if the user left an email address in provided time.
- **Step 5: Create an activity**  
This module creates an activity and assigns it to a particular agent. You can find all planned activities in the Sales - Activities section.

## Call-back pop-up

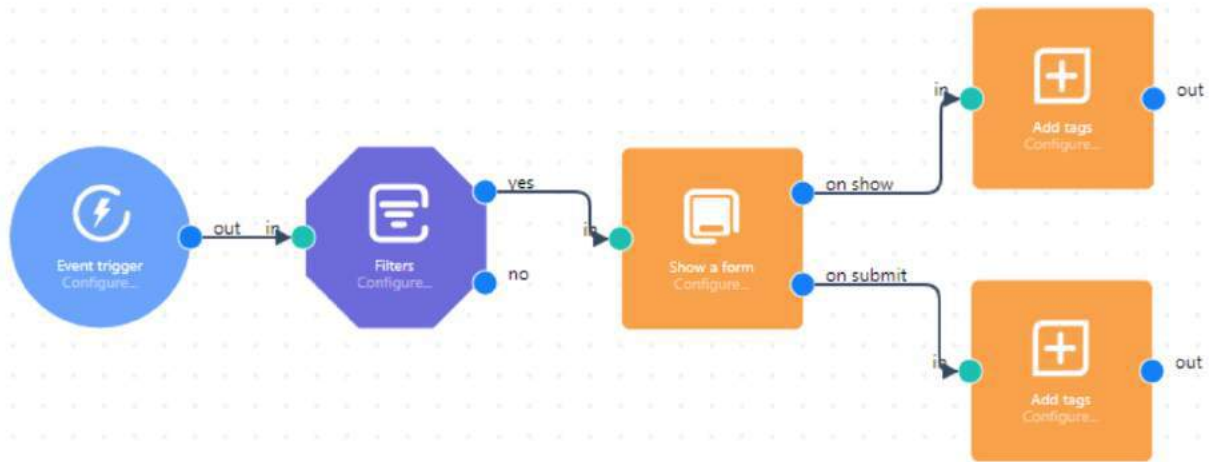
If you are operating in a sector where calls are an important part of making a deal, you can offer to call your potential customers back in a few minutes.



- **Step 1: Event trigger**  
Send an event to User.com (e.g., using GTM) when users scroll to the bottom of your website.
- **Step 2: Show a form**  
Show a pop-up offering to call the visitor back if they leave their phone number.
- **Step 3: Phone campaign**  
Add the visitor to a calling campaign list.
- **Step 4: Create a deal**  
Automatically create a deal and assign it to a particular agent.
- **Step 5: Create an activity**  
Create an activity to keep agents' task list up to date.
- **Step 6: Agent email**  
Notify the agent that there is a client waiting for a call.

## Exit pop-up

Grabbing visitors' attention when they want to leave your website is the last chance to engage them. And this moment has been proven to work in terms of collecting contact information.



- **Step 1: Event trigger**

Use a tool called Data collector to send an event, when users want to leave your website.

- **Step 2: Filters**

Check if the user hasn't already seen the pop-up so that you don't show it twice to the same person.

- **Step 3: Show a form**

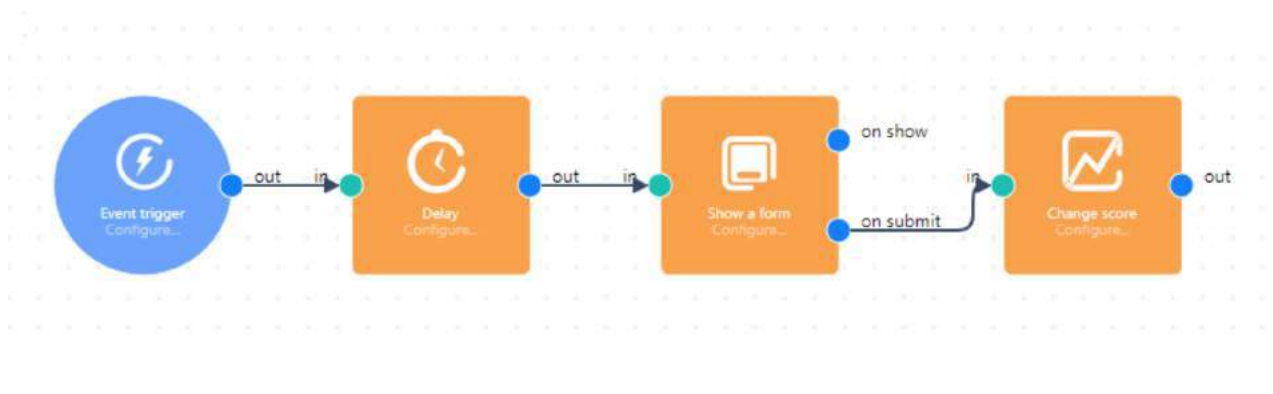
Choose the form you want to show.

- **Step 4: Add tags**

Mark users who have seen or filled the form. This way you'll be able to track its conversion rate.

## Share purchase pop-up

Here is a way to generate more traffic to your website. Encourage every shopper to share the news about their purchase with their friends.



- **Step 1: Event trigger**

Choose the event that is sent to User.com when a person completes a purchase.

- **Step 2: Delay**

Let the user review their purchase information before asking them to take action.

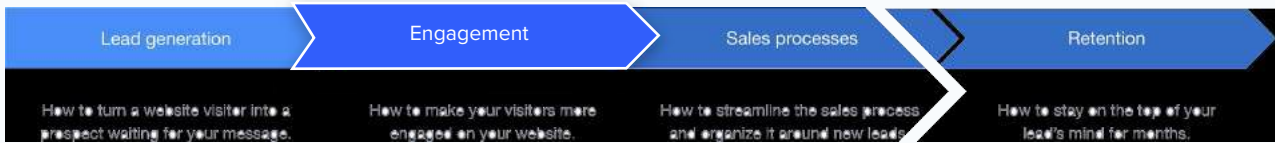
- **Step 3: Show a form**

Display a pop-up form where people will be able to tell their friends about their latest purchase.

- **Step 4: Change score**

Add few scoring points if the person submits the information.

## Chapter 2: Engagement



### How User.com helps in: Engagement

- User.com stores information about customers' behavior in their own profiles.
- Based on the rules you define, you can send automatic messages just in the right time.
- They can be nurturing emails, re-engaging push notifications, reminder SMSes and much more.
- After people come back to your website you can direct their attention using, e.g., dynamic page content.

**#VisitorTracking #MarketingAutomation #Email  
#PushNotification #SMS #DynamicWebsite**

[Learn more about User.com](#)

## Change page content based on viewer's location

Deliver super-personalised landings based on visitor's location. Businesses, where the location is of some importance, will have the opportunity to reach a potential customer with a real value proposition.



- **Step 1: Page visit**

Choose the landing page you want to personalize.

- **Step 2: Filters**

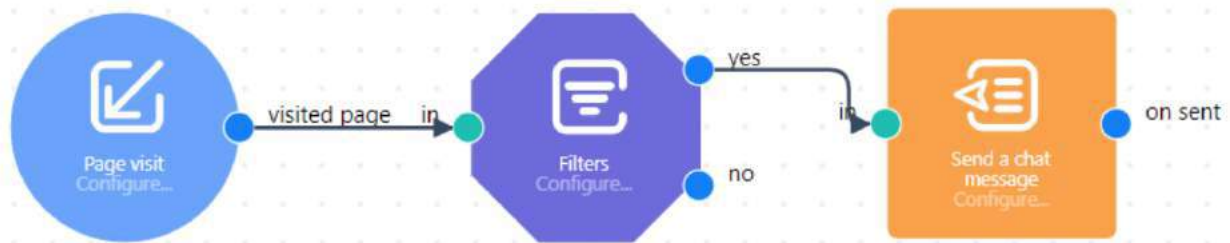
Specify the locations, users from which you want to show different content.

- **Step 3: HTML Block**

Use the HTML Block module to change the page's content dynamically.

## Welcome message in user's language

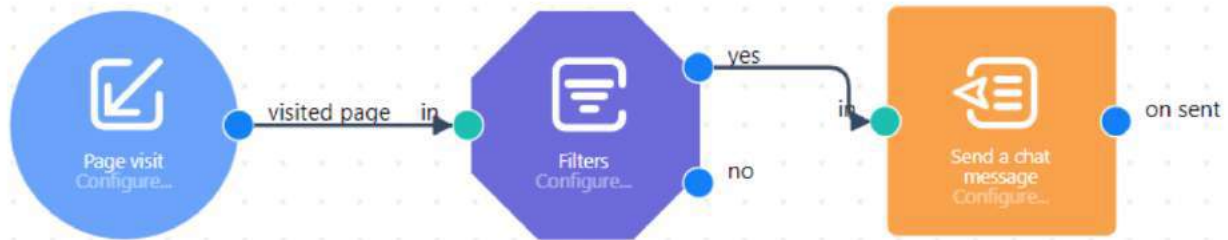
For companies that provide multi-language support, this automation is a must-have. Visitors are far more likely to interact with you in their mother language and showing them they can, delivers excellent results.



- **Step 1: Page visit**  
Set it to start on every page.
- **Step 2: Filters**  
Specify the languages in which you offer support.
- **Step 3: Send a chat message**  
Send a personalized chat message in the language selected in the filter module.

## Welcome message regarding referrer

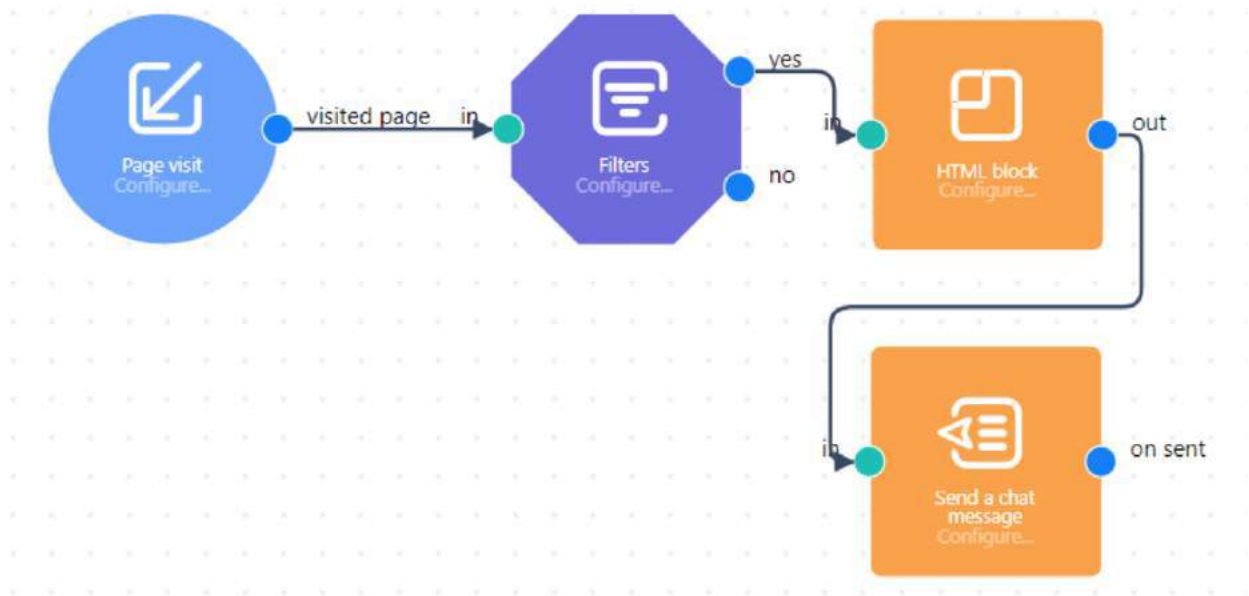
The more personalized your welcome message is, the bigger the chances for successful interaction. In this automation, we will send a personalized chat message based on the visitor's referrer.



- **Step 1: Page visit**  
Set it to start on every page.
- **Step 2: Filters**  
Specify the traffic source visitors from which you want to greet.
- **Step 3: Send a chat message**  
Send a personalized chat message, e.g., asking people coming from social media to like or follow your page.

## Personalization for ads traffic

Your ROAS depends on several aspects: bounce rate, conversion rate, cost of the ad. Delivering messages that directly mention what the user was looking for can drastically improve all of those metrics.



- **Step 1: Event trigger**

Choose the landing page you want to personalize.

- **Step 2: Filters**

Specify the UTM tags that will differentiate people coming from different ads.

- **Step 3: HTML Block**

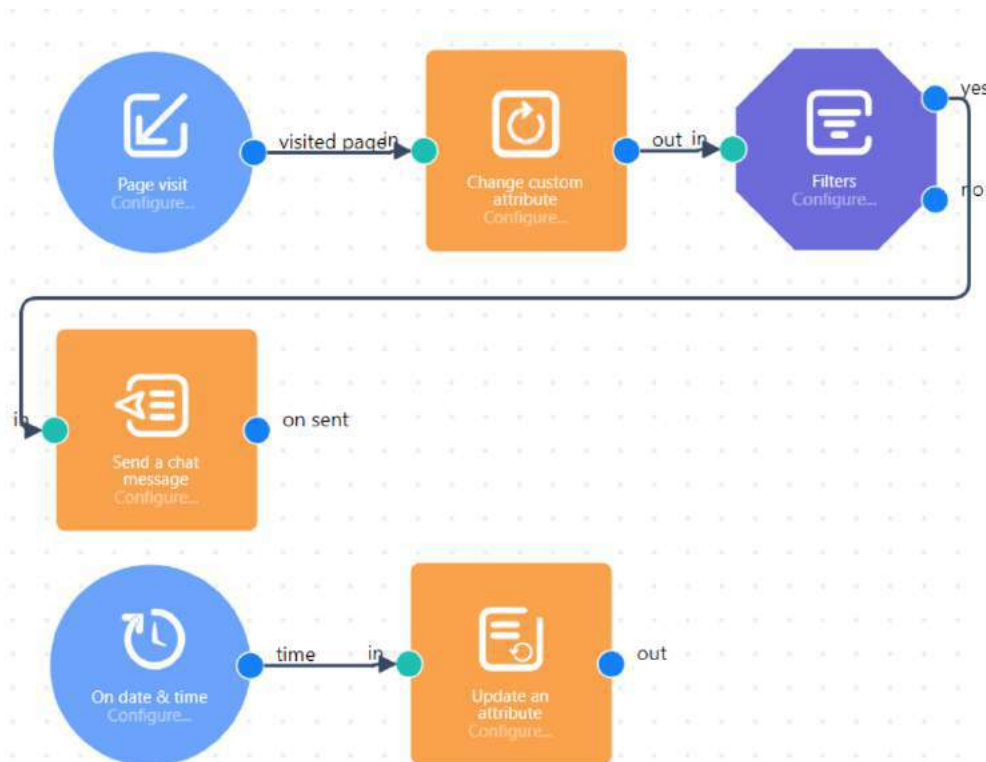
Change the landing page title on-the-fly to match clicked ad text.

- **Step 4: Send a chat message**

Try to engage visitors as soon as possible and convey the information that will catch their attention and reassure them that they are in good hands.

## Chat message after 10 products viewed

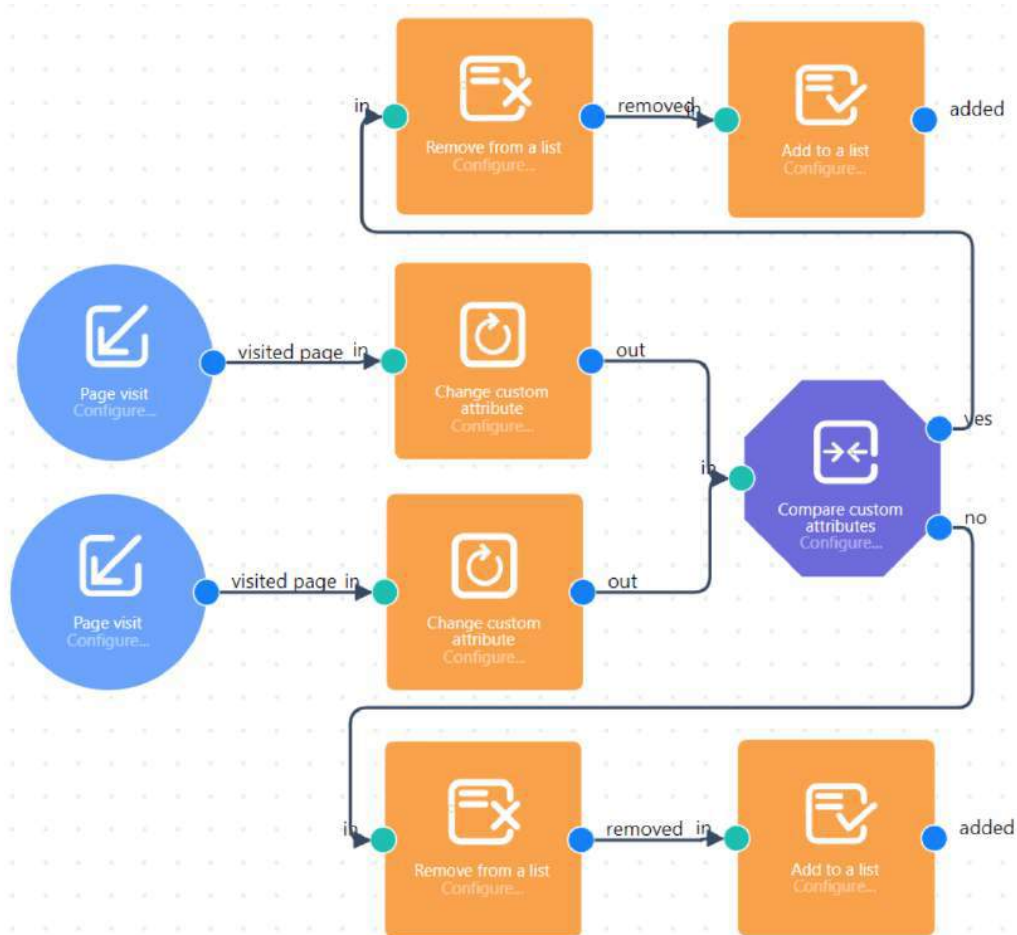
Physical shops used to have a large advantage over e-commerce. A shop assistant could always give valuable advice that makes the decision process easier. Now you can do exactly the same in an automated way.



- **Step 1: Page visit**  
Begin your automation when visited URL contains a product page-specific string.
- **Step 2: Change custom attribute**  
Add 1 to one of your numeric attributes, to track the number of product pages visited this day.
- **Step 3: Filters**  
Check if the value of this attribute is e.g. 10.
- **Step 4: Send a chat message**  
Send an automatic chat message asking if the visitor needs help choosing a proper product.
- **Step 5: On date & time**  
At the end of the day check who has viewed at least one product page last day.
- **Step 6: Update an attribute**  
Set the value of the attribute to 0, to allow for sending the chat message again to people who have already received it.

## Tag users based on their browsing behaviour

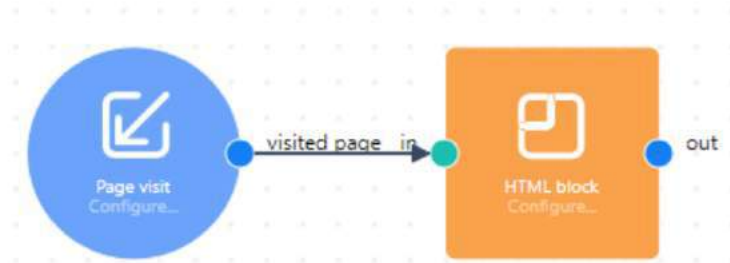
You can add tags to your visitors' profiles based on the actions they take. Divide them into segments to introduce personalized content and allow for automation.



- Step 1: Page visit**  
 Set the URL to contain a string that indicates what category the page belongs to.
- Step 2: Change custom attribute**  
 Add 1 point to the attribute that measures the number of visited pages from a particular category.
- Step 3: Compare custom attributes**  
 Compare attributes to find out which page category the user has visited more often.
- Step 4: Remove from a list**  
 If the value of one of those attributes becomes greater than the other, remove the person from the previous list.
- Step 5: Add to a list**  
 After removing from a list, it's time to add the visitor to the other list, linked to the page category that has been viewed most often.

## Dynamic content with viewed products

When somebody enters your website, you can show the products the person has seen. It will make them reconsider your offer one more time and provide with an easy way to add a product to the cart.



- **Step 1: Page visit**

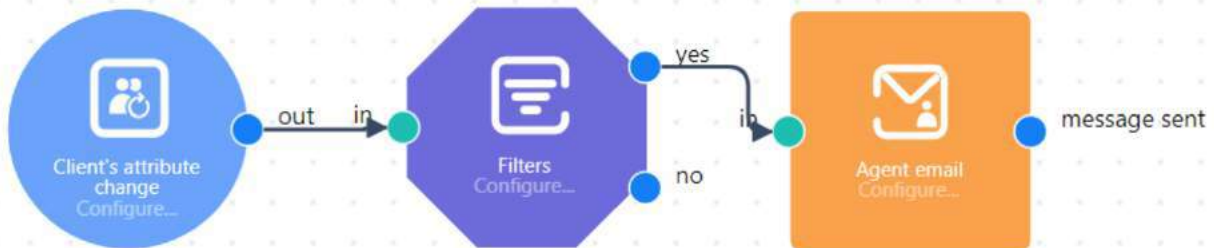
Choose the page you want to show the last visited products on.

- **Step 2: HTML Block**

Choose the dynamic content you have created. To show last visited products, you will need to use event snippet tags I've told you before. You can learn more about them [here](#).

## Get notified when the cart value is above a certain level

Deliver the best support possible to those who spent most. This automation will let you make sure your support know whenever cart value reaches a certain level.



- **Step 1: Client's attribute change**

When the cart value changes, send a ping hit to User.com updating a custom attribute with the value. It will start your automation.

- **Step 2: Filters**

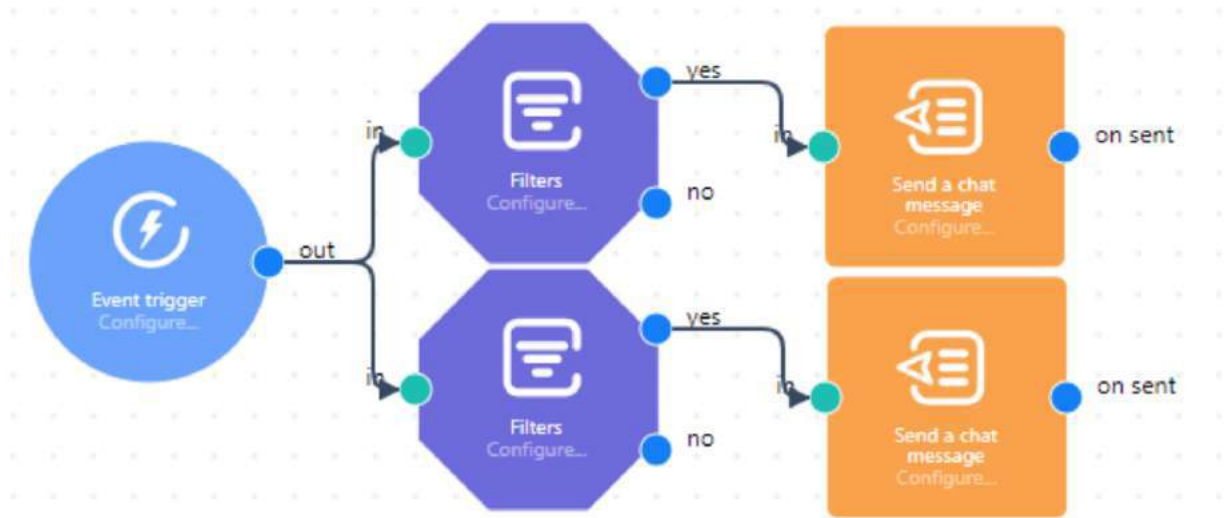
Check if the value of the attribute is above a certain level.

- **Step 3: Agent email**

Let your support agent know that they should contact the user to provide best support.

## Chat message after registration

It's important to engage your leads as soon as they register on your website. To do that, you can send a chat message. To keep your communication coherent, send it from the assigned agent.



- **Step 1: Event trigger**

Send an event when the user completes registration to trigger the action.

- **Step 2: Filters**

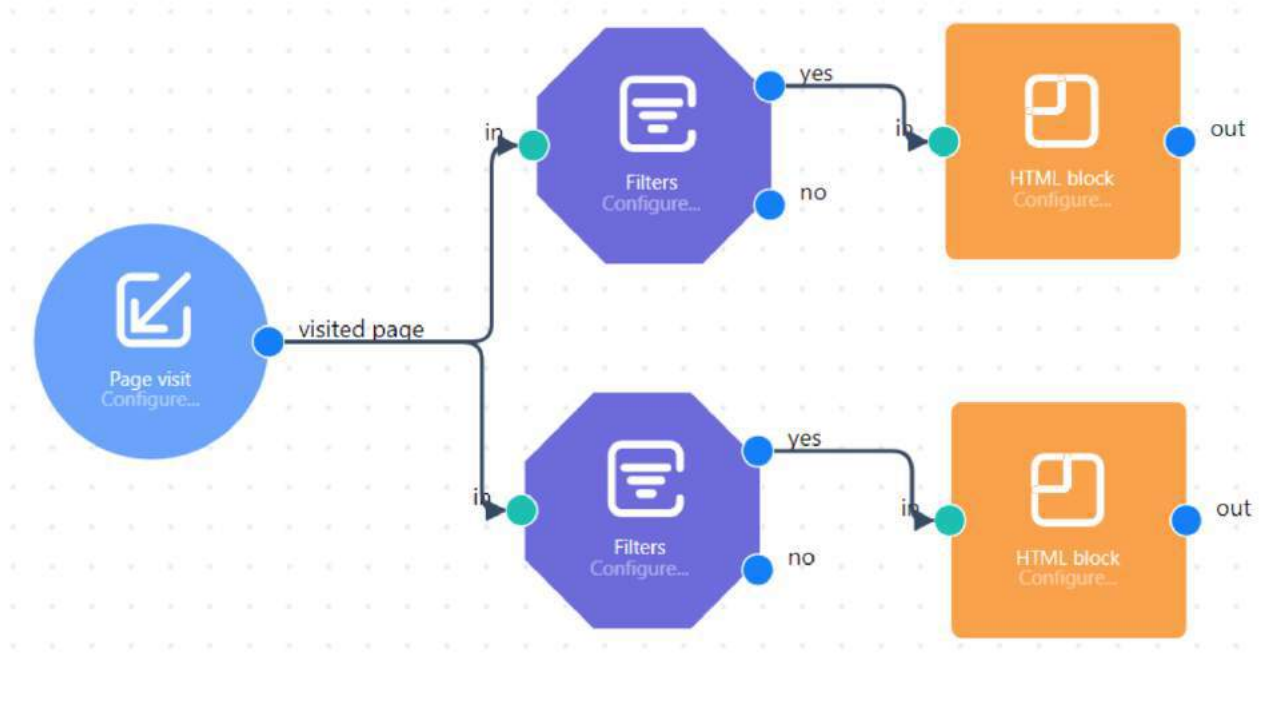
Set filters to check which agent the user is assigned to. In this case, there are only two agents.

- **Step 3: Send a chat message**

Send a personalized chat message.

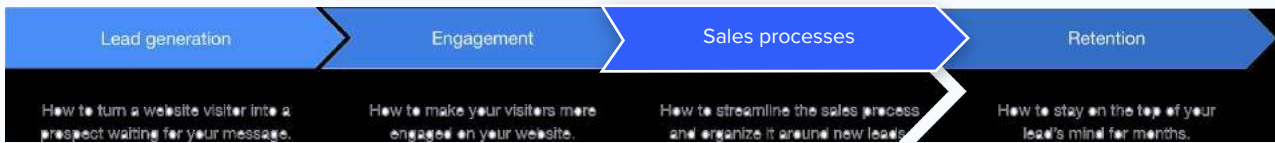
## Display the calendar of an appropriate sales representative

Each lead is assigned to one sales or support agent - that's basics. To make sure they get in touch with them, you can dynamically adjust the content of your website and show, e.g., agent's Calendly iframe encouraging to schedule a meeting.



- **Step 1: Page visit**  
Choose the URL where you want to display the calendar.
- **Step 2: Filters**  
Check which agent the user is assigned to.
- **Step 3: HTML Block**  
Show the calendar as an integral part of your website.

## Chapter 3: Sales processes



### How User.com helps in: Sales Processes

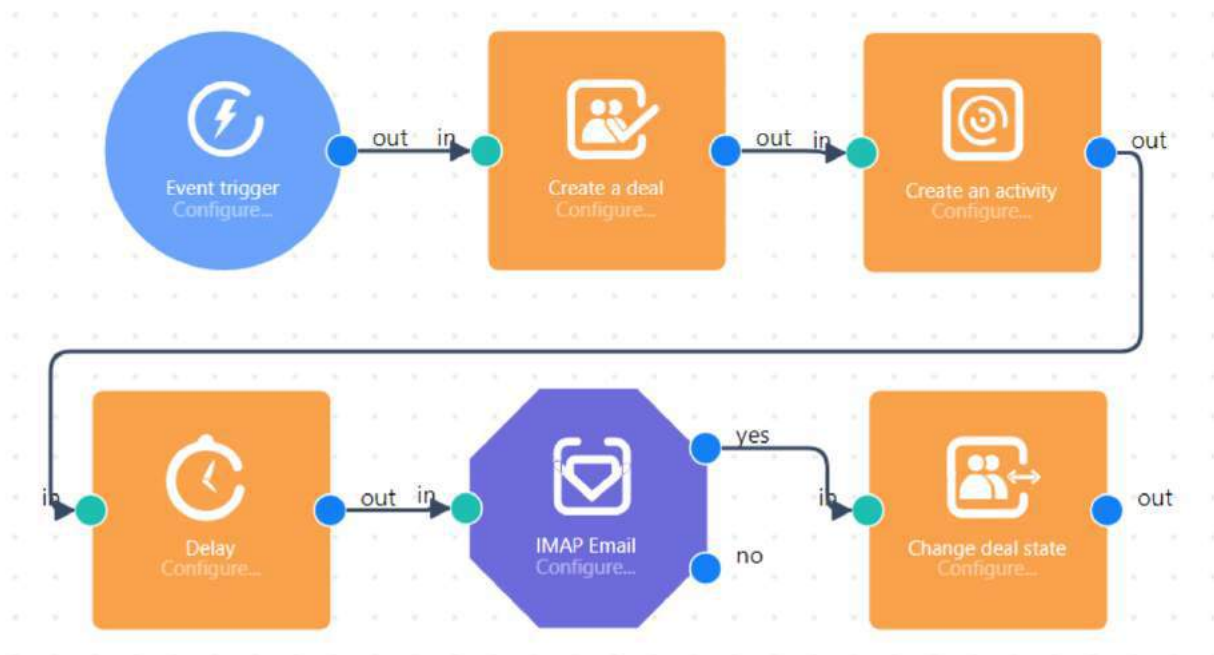
- After you've set up scoring, your MQLs are moved to a CRM.
- Deals, assignments and sales tasks are created automatically to make your work faster.
- Agents receive notifications or reminders and can manage their deals easily with visual pipeline editor.
- Thanks to dashboards and reports, managers have full overview of your sales team's performance.

**#Scoring #SalesAutomation #CRM  
#SalesTasks #Notifications #Dashboards #Reports**

[Learn more about User.com](#)

## Schedule activities when a new lead arrives

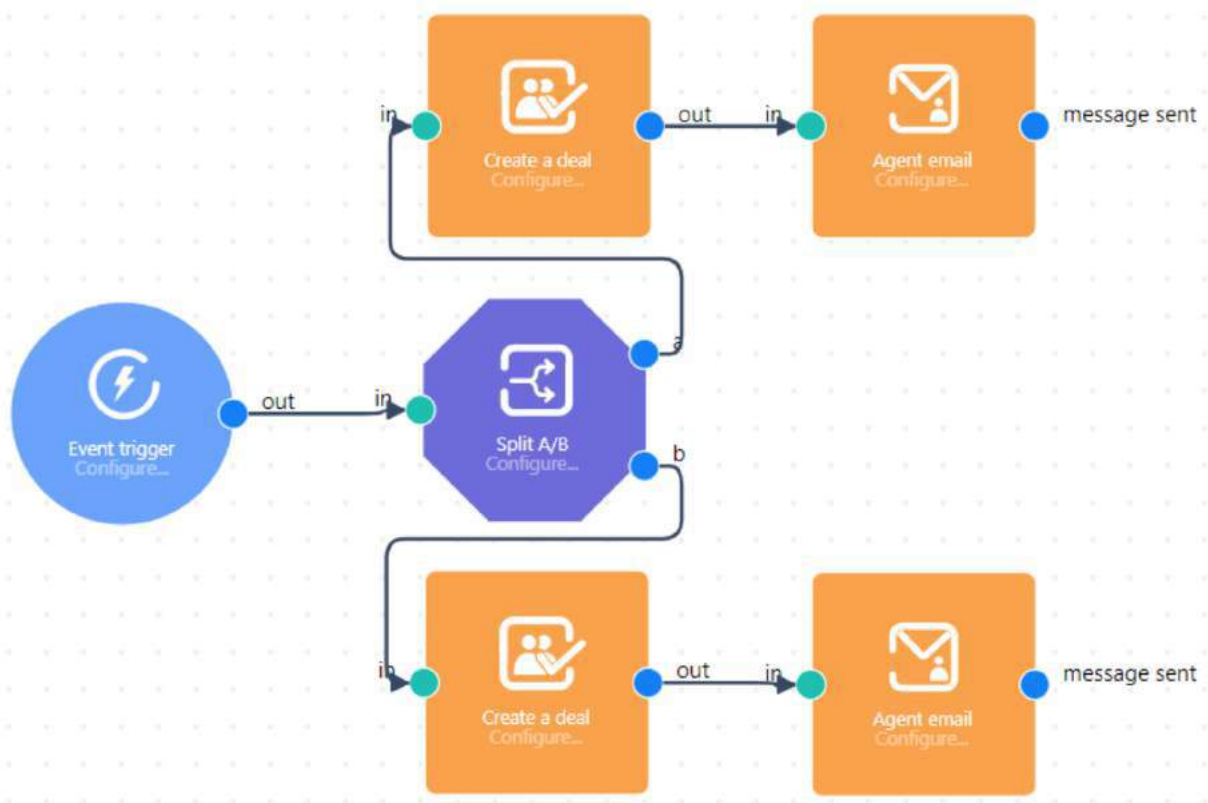
Sales reps should focus on closing deals, not doing administrative work. This automation will do the boring job for them. Reporting, scheduling work and reminding about activities - all of this can be done instantly when a new lead arrives.



- **Step 1: Event trigger**  
Start your automation, e.g., when user fills out a form.
- **Step 2: Create a deal**  
Create a deal for the new lead.
- **Step 3: Create an activity**  
Create an activity so that your sales reps know they need to send a follow-up email.
- **Step 4: Delay**  
Wait few days after sending the email.
- **Step 5: IMAP Email**  
Check if the user has replied to the agent's message.
- **Step 6: Change deal state**  
If there was a response, move the deal to the next funnel stage.

## Create CRM deal at registration

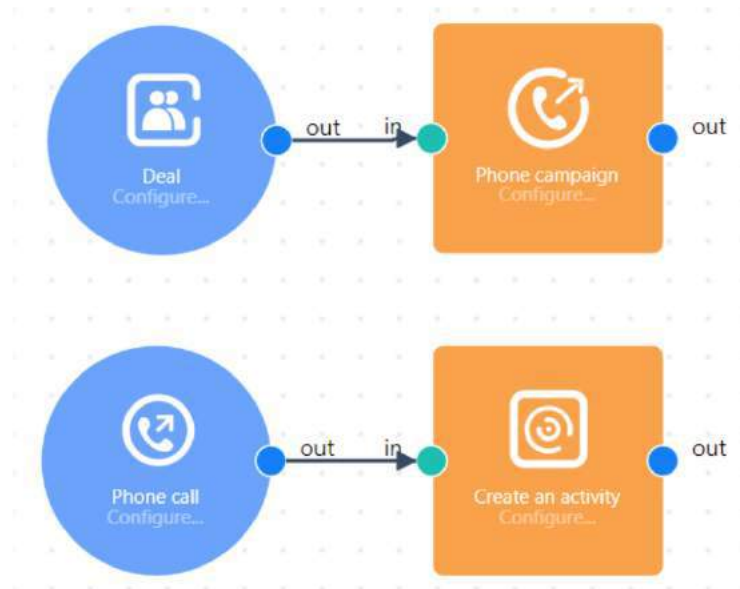
Organise your lead management and make sure your sales reps receive new leads in just the right moment. In this automation, we create a new deal every time someone registers on your website and evenly distribute among two agents.



- **Step 1: Event trigger**  
Choose the event that is sent to User.com upon registration.
- **Step 2: Split A/B**  
Use this module to assign leads to different agents evenly.
- **Step 3: Create a deal**  
Create a deal and assign it to one of your agents.
- **Step 4: Agent email**  
Inform your agents about new registrations.

## Add visitors to a calling campaign when a new deal is created

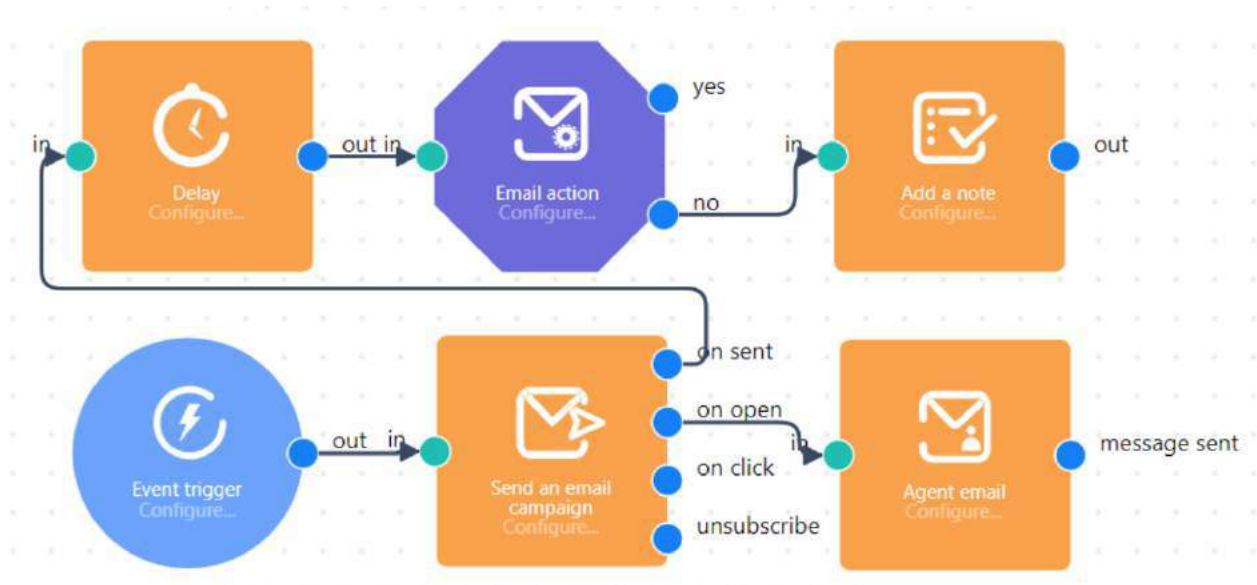
The faster you get in touch with the website user, the better. In this automation, the sales rep is informed about a new lead right after the registration and receives a request to call the visitor.



- **Step 1: Deal**  
Start your automation when the deal is created.
- **Step 2: Phone campaign**  
Schedule the calling campaign so that your agent has everything ready.
- **Step 3: Phone call**  
After the call ends trigger a second path.
- **Step 4: Create an activity**  
Create an activity so that your agent knows when it's time to follow-up on the lead.

## Notify sales representatives when leads open your emails

Knowing if your lead opened your last email can change a lot in your follow-up communication. In this automation, a sales representative will be notified about the status by email and using notes.



- **Step 1: Event trigger**  
Start your automation, e.g., when user fills out a form.
- **Step 2: Send an email campaign**  
Send an automatic email regarding the filled form.
- **Step 3: Agent email**  
Let the agent know when the person opens it.
- **Step 4: Delay**  
Wait some time until checking the open status.
- **Step 5: IMAP Email**  
Check if the email was opened or not.
- **Step 6: Add a note**  
Add a note to user's profile mentioning the appropriate agent and informing that the user has not opened the email.

## Notify sales representatives when a lead is back online

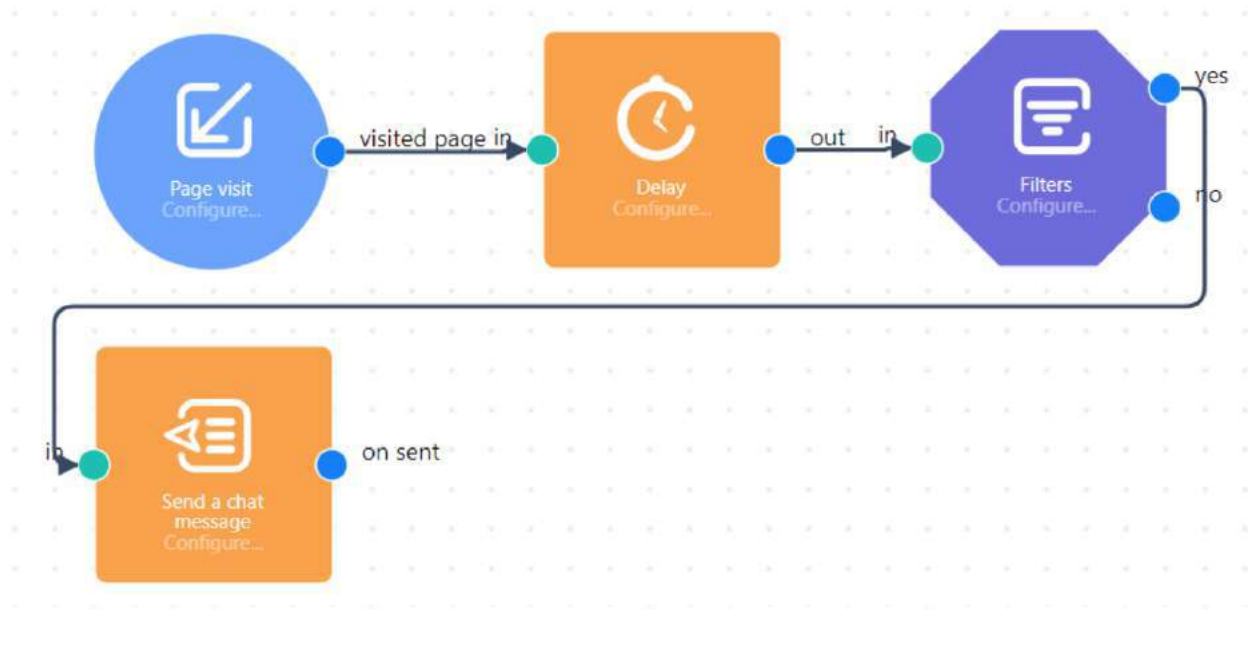
You can get your sales representatives notified when the person visits your pricing page or any other that plays some role in your conversion path.



- **Step 1: Page visit**  
Start your automation when a lead visits one of your key pages.
- **Step 2: Filter**  
Check which agent the lead is assigned to.
- **Step 3: Mobile notification**  
Notify the appropriate agent about the opportunity to contact the visitor.

## Chat message on the checkout page for hesitating shoppers

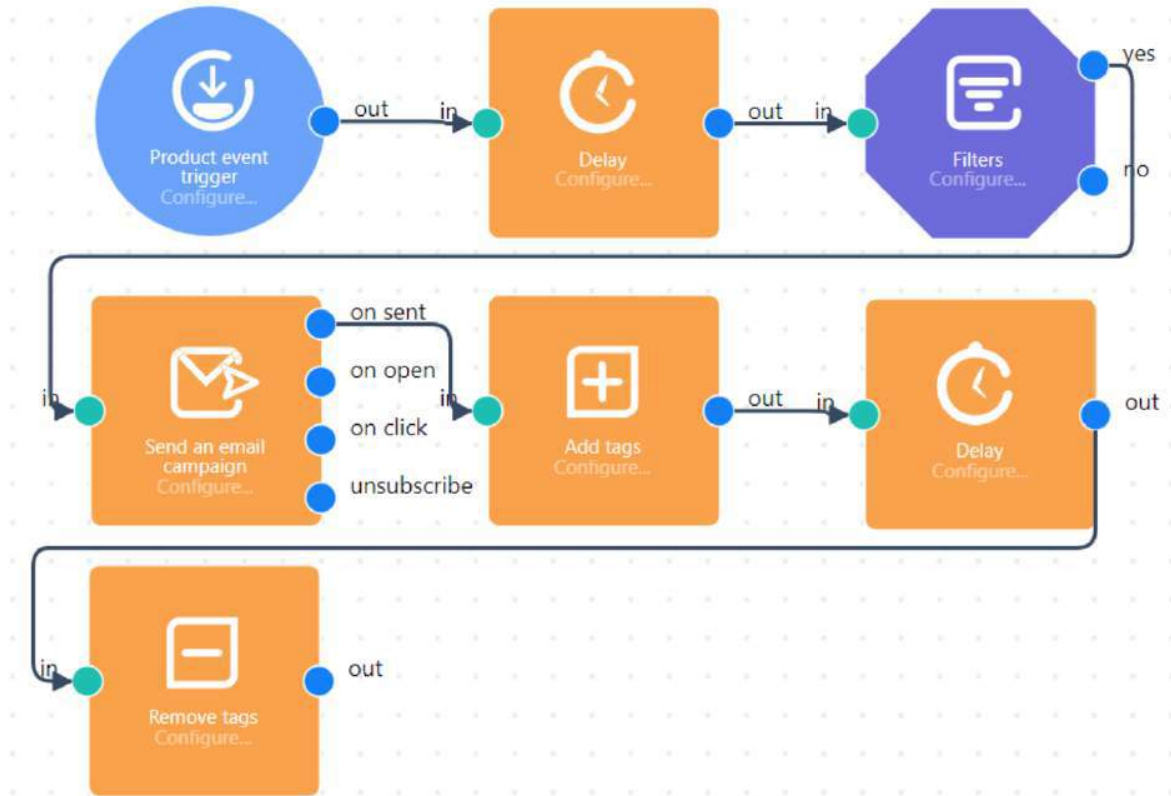
The checkout phase is a significant element of the sales funnel. Making sure that all the people go through this bottleneck is crucial. You can automate sending a micro discount to users who are stuck on it for a long time.



- **Step 1: Page visit**  
Use the URL of your check out page.
- **Step 2: Delay**  
Set it to a few seconds less than the average time spent on this page by people who didn't convert.
- **Step 3: Filters**  
Check if the last visited page is still the check out page and whether the cart value is greater than 0.
- **Step 4: Send a chat message**  
Offer your help or send a discount to people who are stuck in this last phase.

## Save abandoned carts

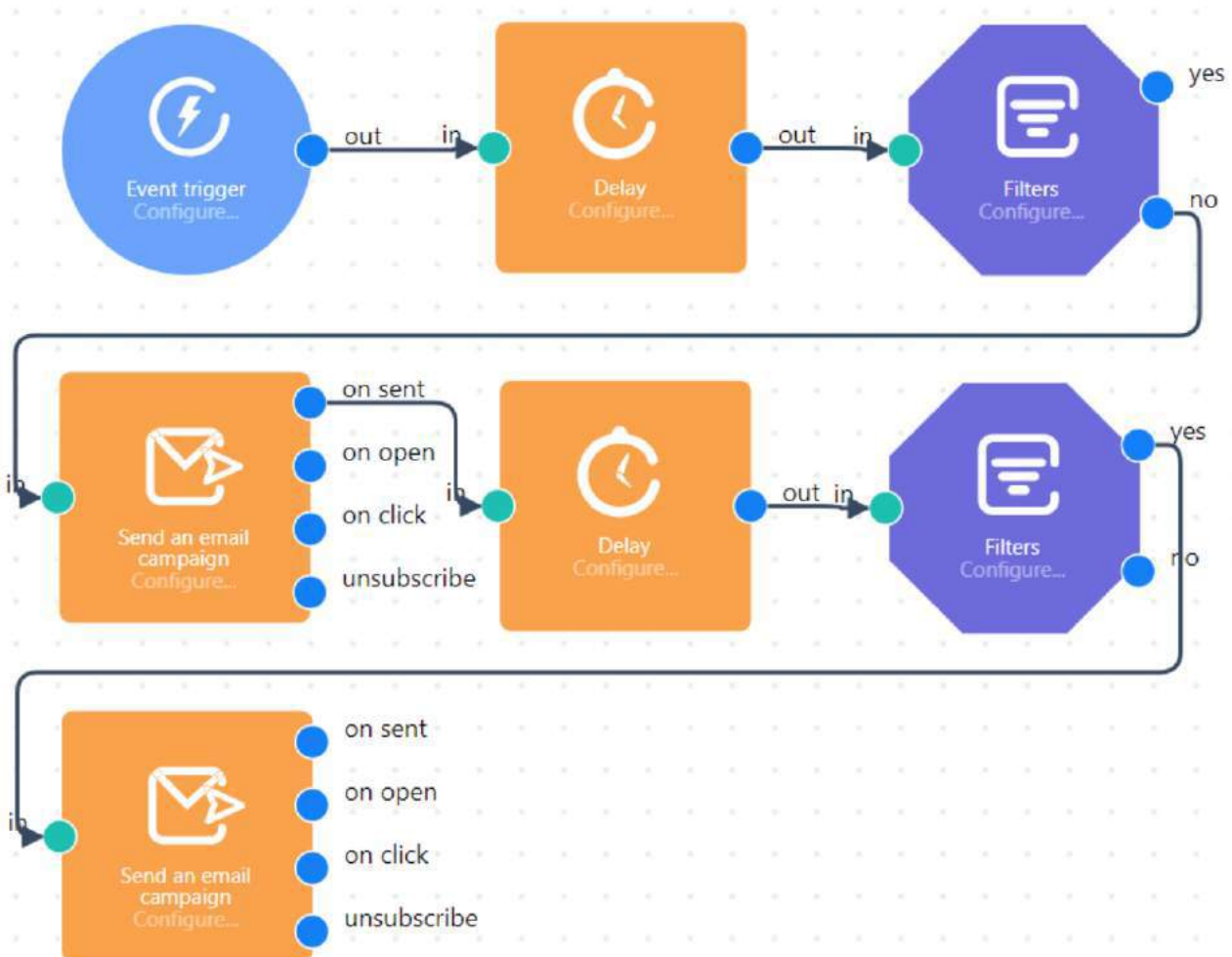
People often add products to their carts and leave the store without completing their purchase. In some cases, sending an email showing those products will be enough to make them go through the checkout.



- **Step 1: Event trigger**  
Use add\_to\_cart product event as the trigger.
- **Step 2: Delay**  
Wait one day before executing following action.
- **Step 3: Filters**  
Check if the cart value is still above 0.
- **Step 4: Send an email campaign**  
Send an email using snippet tags that will render products that were added to the cart.
- **Step 5: Add tags**  
Add tags to mark the user that has already received such email this day.
- **Step 6: Delay**  
Wait one day to remove the tag.
- **Step 7: Remove tags**  
Remove the tag to allow for sending the abandoned cart recovery email in the future.

## Payment reminder email

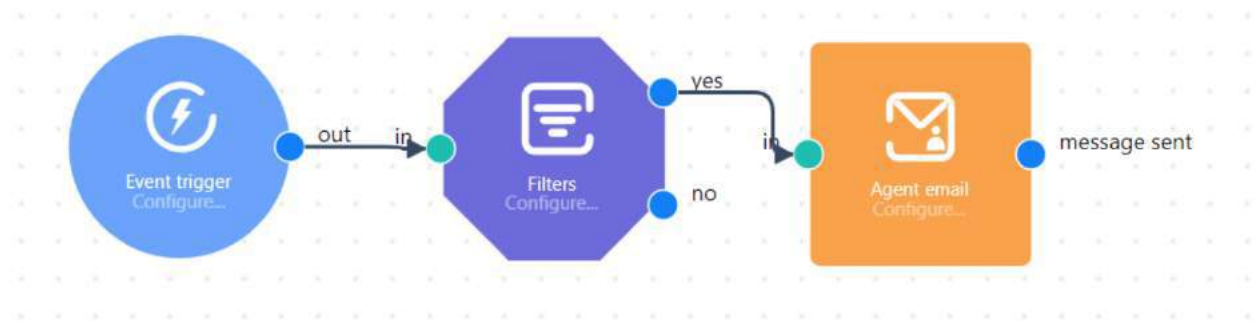
The conversion might be in place but that does not change much if your lead does not pay. In this automation, you can remind them about the invoice without having to send a single email yourself.



- **Step 1: Event trigger**  
Send an event to User.com when you issue the invoice.
- **Step 2: Delay**  
Set it to your regular payment period.
- **Step 3: Filters**  
Check if you've received the payment.
- **Step 4: Send an email**  
Send an email reminding your customer about the overdue payment.
- **Step 5: Repeat the process**  
After the next couple of days repeat the process and send the second email asking for the payment.

## Notify sales representatives when users pay

An email saying “Well done, you’ve just closed another deal!” is the best thing a sales rep can receive. Sending such an email will motivate them and help them avoid situations where they keep ping-ponging converted users.



- **Step 1: Event trigger**  
Trigger your action with the payment event.
- **Step 2: Filter**  
Check which agent the new customer was assigned to.
- **Step 3: Agent email**  
Send an email with congratulations on closing the deal.

## Chapter 4: Retention



### How User.com helps in: Retention

- You can create a loyalty program that will keep people coming back for more.
- Make your brand memorable by keeping in touch with customers in multiple channels.
- Collect feedback by creating surveys on chat or in pop-ups and see their results on colorful charts.
- With a knowledge base, live chat and chatbot, User.com lets you provide fast and comfortable support.

**#LoyaltyProgram #Omnichannel #ChatbotSurveys  
#Charts #KnowledgeBase #LiveChat**

[Learn more about User.com](#)

## Precise remarketing

Remarketing is surely the king among all other advertising options. Keeping it personalized will let you cut its costs and increase your ads' CTR. Below you can see the path that lets you create remarketing lists with data gathered by User.com.



- **Step 1: Page visit**

It's important that you start your path with a page visit or using another module related to some interaction on your website.

- **Step 2: Filter**

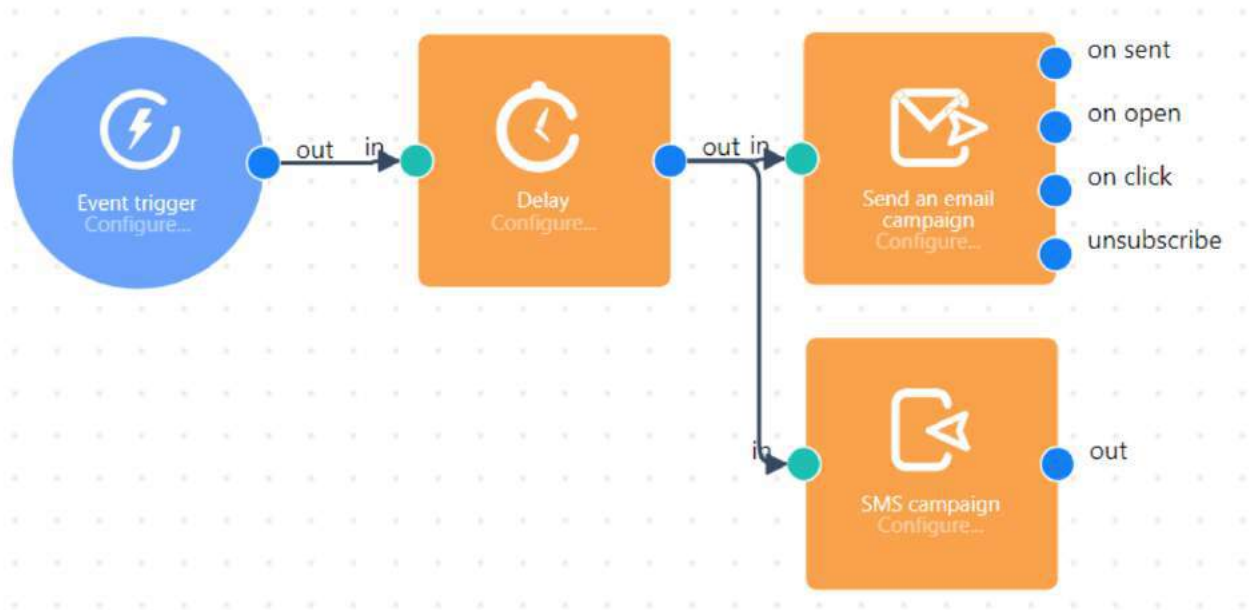
Set filtering rules to match your target audience, e.g., people who have asked a question on chat but left without waiting for the answer.

- **Step 3: Send code**

Send your remarketing tag to Google Ads, Facebook or any other advertising platform. To learn how, [read this article](#).

## Ending subscription

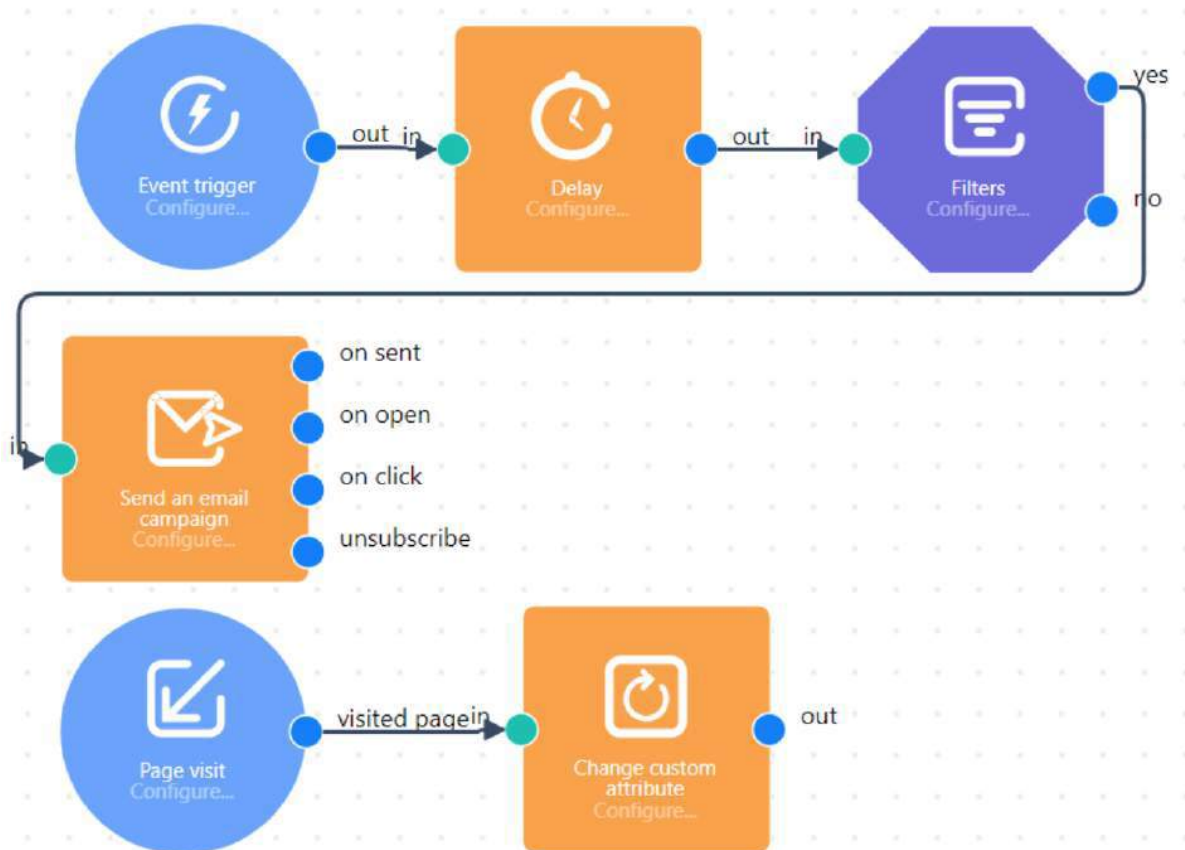
Reminding about the end of the user's subscription or trial period is proven to work. A vast majority of people don't remember such dates, so sending an SMS or an email is a great way to keep your customers on board.



- **Step 1: Event trigger**  
Make the automation start when the user registers for your service.
- **Step 2: Delay**  
Set the delay to a few days less than lasts the subscription period.
- **Step 3: Send an email campaign**  
Send the reminder email.
- **Step 4: SMS campaign**  
If you want to make sure that your user reads your message, you can send an SMS as well.

## Re-engagement email if user left shortly after registration

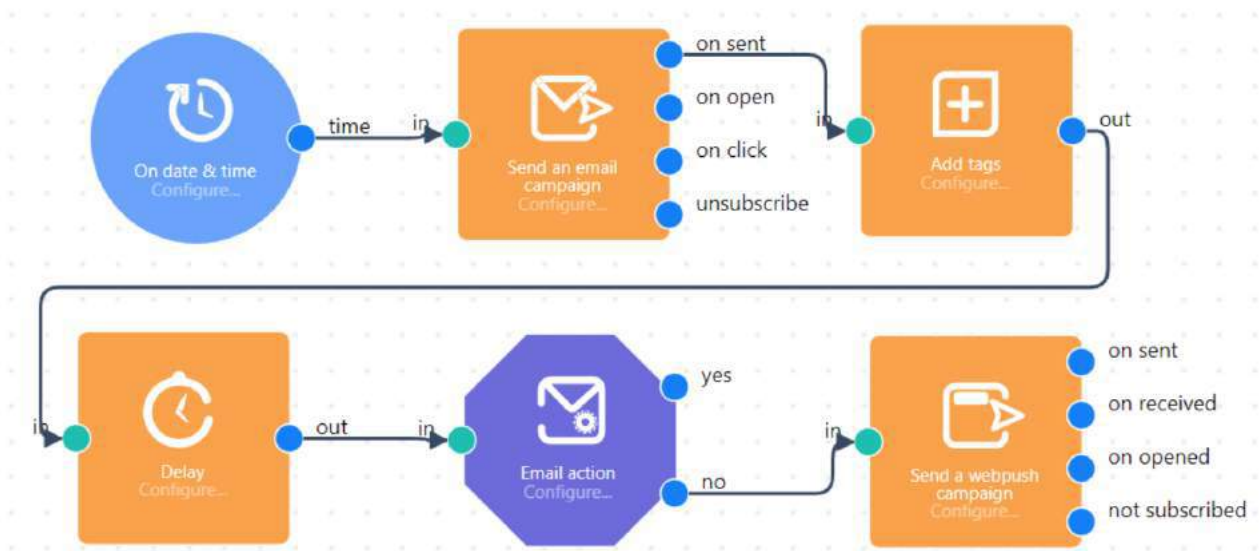
Some users instantly get hooked on your website, while others are less engaged and need additional motivation. With this automation, you will contact users who have left your website shortly after registration.



- **Step 1: Event trigger**  
Trigger your automation path at the moment of registration
- **Step 2: Page Visit**  
Start the second path with every page view where URL contains a backend-specific string.
- **Step 3: Change custom attribute**  
Update a custom attribute tracking the number of backend page views.
- **Step 4: Delay**  
Specify the time after which you will check the number of visits.
- **Step 5: Filters**  
Check if the number of page views is greater than e.g. 10.
- **Step 6: Send an email campaign**  
Send an email to keep contact with the lead.

## Email to long inactive customers

It happens that people forget about your brand or are just too busy to visit your website. In these cases, it's always a good idea to send an email with a discount code or a push notification that will plant a seed for the next purchase.



- **Step 1: On date & time**

Set the action to repeat every day and set it to fire only for customers that haven't been on your website for more than 45 days.

- **Step 2: Send an email campaign**

Send an email with a small discount code to give an incentive for visiting your store.

- **Step 3: Add tags**

Add a tag that will let you exclude from this automation people who have already received the email.

- **Step 4: Delay**

Wait two days.

- **Step 5: Email action**

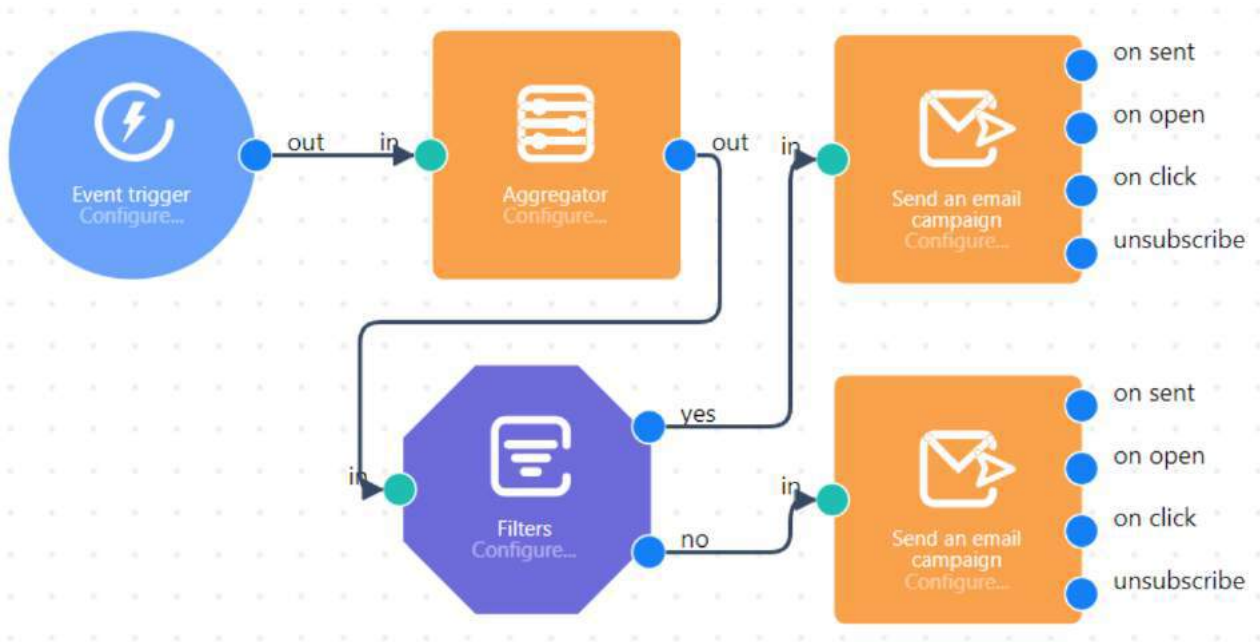
Check if the recipient has opened your email message.

- **Step 6: Send an web push campaign**

If the user hasn't opened the email, send a web push notification trying to reach the user via different channel.

## Loyalty program

A great way to keep your customers buying from you is creating a loyalty program. With every purchase, you need to increase the value of some custom attribute and inform customers about the points they need to acquire in order to gain some benefits.



- **Step 1: Event trigger**

Trigger the path when the purchase event is sent.

- **Step 2: Aggregator**

Sum the values of purchases the person has made in the last 365 days and save it to a custom attribute.

- **Step 3: Filters**

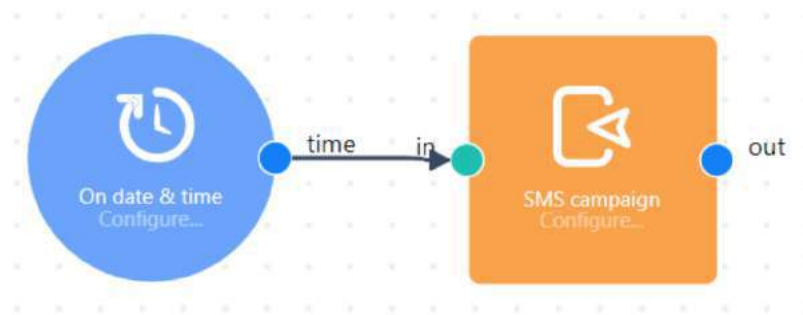
Check if the value of this attribute has reached a certain level.

- **Step 4: Send an email campaign**

Depending on the attribute's value send different email messages - one congratulating reaching the next level, and the other informing about loyalty point levels and the current status.

## SMS with a birthday gift

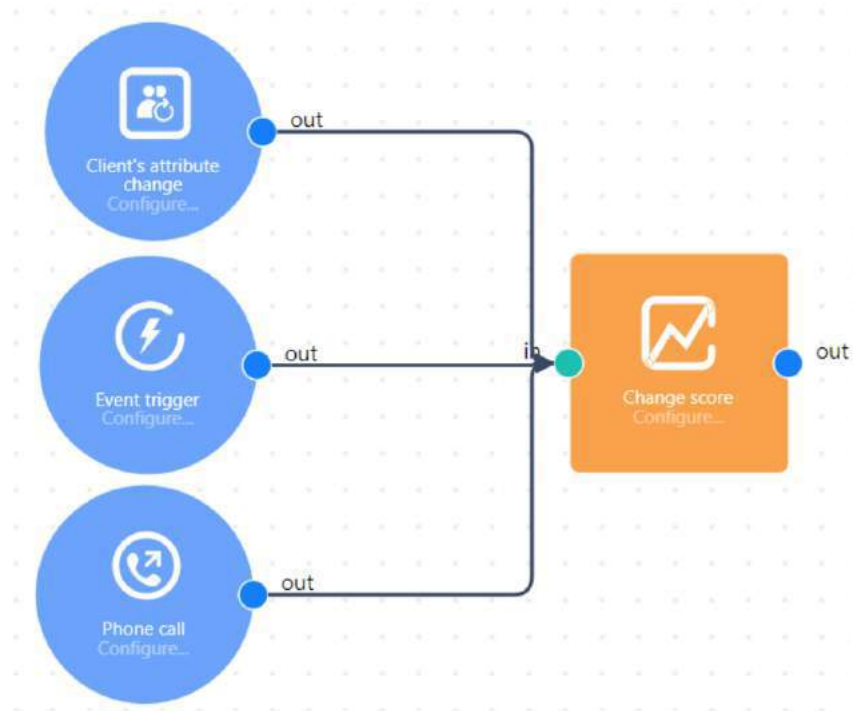
Knowing your customers' birthday might help you surprise them and create a tighter bond. A simple SMS with a birthday gift will undoubtedly improve your brand image and make customers more likely to refer you to their friends.



- **Step 1: On date & time**  
Set the action to repeat every day and check if today is the user's birthday.
- **Step 2: SMS campaign**  
Send a text message wishing the recipient all the best and add a discount code inside.

## User scoring based on behavior

Scoring allows for segmentation based on user's engagement. It will let you define groups of clients that are more or less likely to stay loyal and perhaps need some additional attention.



- **Step 1: Client's attribute change, Event trigger and Phone call**  
Just choose what kind of action should increase or decrease user's score.
- **Step 2: Change score**  
Add or subtract a certain amount of points depending on the value of each action.

## Tag VIP buyers

This automation will let you analyze your performance and see where the space to improve is. Thanks to that you can provide them with the support and care they deserve.



- **Step 1: Client's attribute change**

If you score your customers, you can use the change in this attribute to start your action.

- **Step 2: Filters**

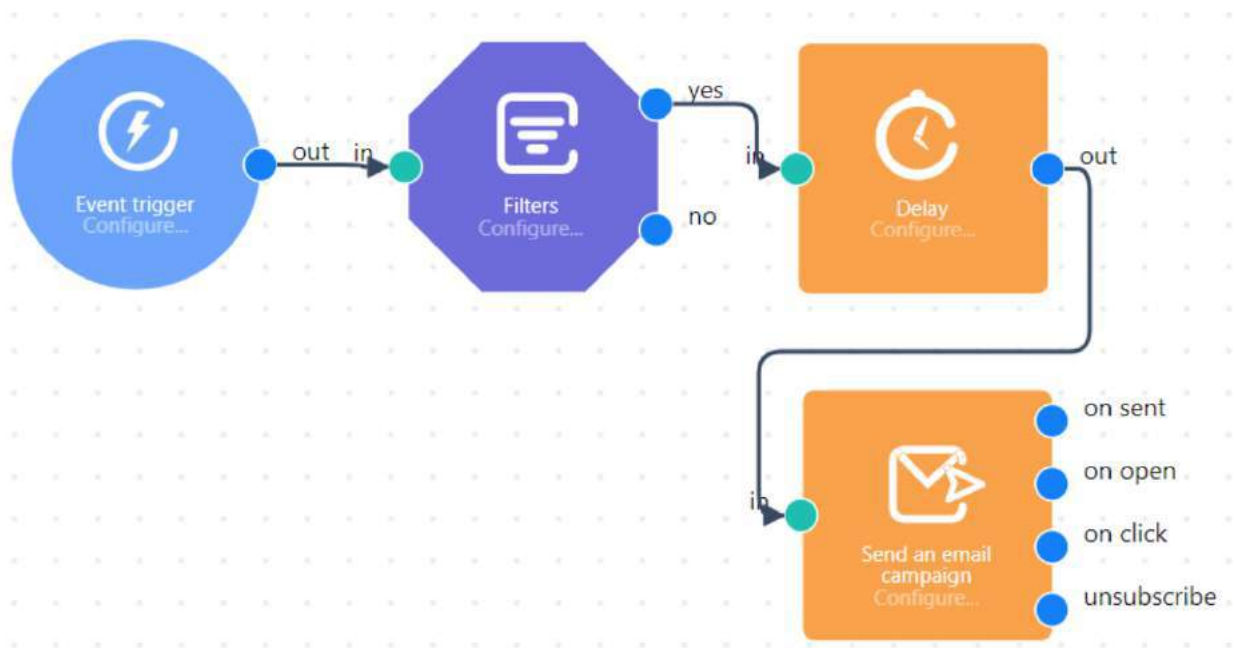
Check which payment it was. Depending on your business you may want to send the NPS after the first or any other payment

- **Step 3: Add tags**

Add the VIP tag.

## NPS measurement

The first step to improving your product and service is to know what's wrong. This automation will let you analyze how well you're doing and where is a space to improve.



- **Step 1: Event trigger**

Trigger your automation path at the moment of a payment.

- **Step 2: Filters**

Check which payment it was. Depending on your business you may want to send NPS after the first or any other payment.

- **Step 3: Delay**

Set the delay to, e.g., 14 days.

- **Step 4: Send an email campaign**

Send an email with the NPS survey. You will need to add links to answers that will redirect recipients to your website. Then, attach tags to these links like <https://User.com.com/?nps=10> to let User.com save the value in the user's profile

**Important note:**

You need to have a custom attribute called “nps” created for the answers to be saved.

# About User.com

Right from the start it tracks every step of each website visitor and lets you automate segmentation, scoring, communication and other marketing, sales and support tasks. It makes your life easier providing one interface for all your communication.

You'll find there:

- email marketing,
- live chat,
- chatbot,
- push notifications,
- call center,
- SMS dispatch,
- pop-ups and
- dynamic page content.

With an automated CRM and full information about each lead sales team can focus on selling and forget repetitive tasks.

Analytics and reporting modules let managers have full control over their team's performance.

Click below to learn more.

[Learn more about User.com](#)