Positive User

White Paper

MARKETING AUTOMATION

A Practical Guide to Growing Your Business

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Introduction : Why marketing automation matters more than ever?

You work hard on your marketing. You craft messages, set campaigns, and work to build relationships with your audience. But if your tools can't keep up with the pace of modern business, even the most thoughtful strategy falls short. That's where marketing automation comes in. It is the bridge between your intentions and consistent, scalable results. Without it, even great ideas struggle to reach the right person at the right time.

The challenge? Consumer expectations are at an all-time high. People want interactions that feel personal, timely, and relevantnot generic blasts sent to everyone on a list. Meeting that bar manually is simply not sustainable.

The good news: this guide is here to make marketing automation simple, human, and manageable. You don't need to be a developer or a data scientist to get this right. You just need to understand the principles and apply them consistently.

We've designed this guide to help you adopt the right mindset and build the right habits. Let's walk through it together, step by step.

Marketing automation in one look

01

Marketing automation might feel like a complex technical topic, but at its core, it is built on a surprisingly simple idea: relevance at scale. Your audience needs to feel understood. They respond to messages that speak to their specific situation, their behavior, their interests, their stage in the buying journey. Marketing automation makes that possible, even when your audience is thousands of people.

What marketing automation actually means

When we talk about automation, we are talking about your ability to send the right message, to the right person, at the right moment without doing it manually every time. It is not just a time-saving tool. It is the decisive factor that determines whether your marketing creates real engagement or simply gets ignored.

Why it matters

Marketing automation is the foundation upon which your entire growth strategy rests. If it is solid, every part of your marketing from lead nurturing to post-purchase loyaltyworks better. It translates into higher visibility, stronger engagement, and more conversions. But if your automation is weak or absent, everything else you build on top of it risks failing.

What influences performance the most

Effective automation never depends on a single element. It is the result of all your choices as a marketer much like a domino effect. It depends on the quality of your data and segmentation. It relies on the relevance of your content and the timing of your messages. And it hangs on how well your platform brings everything together.

The four pillars of marketing automation

To help you navigate this guide, we have organized it around four essential pillars:

- **Pillar 1:** Build a strategy that drives real results
- **Pillar 2:** The platform: Positive User, explained simply
- **Pillar 3:** Features that take your automation to the next level
- **Pillar 4:** Measure, learn, and keep improving

Understanding marketing automation

02

Signals

Marketing automation does not depend on luck or guesswork. It relies on signals.

Every time someone interacts with your brand visiting a page, opening an email, abandoning a cart they are sending you a signal. They are telling you something about their interests, their intent, and their readiness to act. The job of automation is to capture those signals and respond intelligently, without requiring manual intervention for every single touchpoint.

Think of your automation platform as an attentive team member that never sleeps. It tracks every interaction, segments your audience based on behavior, and sends the most relevant message at exactly the right moment. If it sees a reliable pattern: a customer who always buys around a certain season, a lead who views the pricing page three times in a week, it responds accordingly.

A concrete example

Picture an e-commerce brand that sends a weekly newsletter to its full database. Performance is decent, but nothing exceptional. Then they implement Positive User. They segment their audience by purchase history and browsing behavior. They create automated flows: a cart abandonment sequence, a post-purchase onboarding, a re-engagement campaign for inactive contacts. What happens next? Engagement rates climb, revenue increases, and their team spends less time on repetitive tasks and more time on strategy.

The good news: marketing automation is not a static condition. It is a living system that grows smarter with time. By adopting healthy habits and feeding it with clean, relevant data, your results become more stable and predictable day by day.

Pillar 1:
Build a strategy that drives real results

03

Marketing automation is not just a tech decision. It is a strategic one. Getting the most from automation starts long before you touch a platform.

Why a strategy-first approach matters

In a saturated digital landscape, consumers are bombarded with information. Their expectations are high: they want interactions that feel personal, relevant, and immediate. Marketing automation answers this challenge by allowing businesses to react quickly to their customers' needs, while dramatically reducing manual effort. But reducing automation to a simple time-saver would be a mistake. It fundamentally redefines how businesses interact with prospects and customers. Without a clear strategy guiding it, even the best automation tool will underperform.

Three powerful levers you must activate

Personalization at scale

Adapt your messages to specific customer segments to drive engagement. A shopper who abandons their cart can automatically receive a follow-up email or a targeted incentive increasing conversion chances without any manual action.

Intelligent lead nurturing

Automate the follow-up of every prospect, from their first interaction to conversion. Nurturing campaigns trigger at strategic moments, ensuring each lead receives the right information at the right time.

ROI optimization

By delegating repetitive processes to automated systems, your marketing team focuses on high-value work. This accelerates your return on investment and reduces operational cost.

An unavoidable strategy in 2026

Ignoring marketing automation today means leaving real opportunities on the table. Studies show that companies adopting this technology increase their sales opportunities by 20% and reduce operational costs by 12%. But the impact goes beyond numbers.

Marketing automation helps build stronger customer relationships by creating fluid, personalized experiences. Performance is even greater when tools operate across multiple channels/emails, push notifications, chatbots, and SMSall synchronized through a single platform like Positive User.

Key figures:

- +20% increase in sales opportunities
- -12% reduction in operational costs
- +40% email open rates with predictive AI recommendations

The role of AI in modern automation

As marketing automation continues to evolve, artificial intelligence plays an increasingly central role. With AI, businesses can predict customer behaviors and automatically adjust campaigns to maximize results.

Machine learning algorithms can determine the ideal moment to send an email or identify the best offer to present to each user. The result? One Positive User client saw their email open rates jump 40% thanks to predictive recommendations.

With marketing automation and AI, you don't just meet your customers' expectations. You exceed them.

Pillar 2:
Positive User: the platform, explained simply

04

A great strategy needs the right tool behind it. Here is how Positive User makes it all come together.

An all-in-one platform for centralized management

Positive User is designed to simplify and strengthen your marketing automation strategy. Everything lives in one place: tracking of all digital interactions, CRM, customer data management, campaign automation, and omnichannel communication. This level of integration improves efficiency and gives you a complete picture of every customer and every interaction.

What's included:

- CRM for customer data management
- Native CDP to centralize, unify, and activate customer data from multiple sources in real time
- No-code automation builder for designing marketing scenarios
- Omnichannel engagement tools: email, SMS, WhatsApp, chatbots, push notifications
- Analytics and reporting to optimize campaign performance

Personalization and real-time tracking

Positive User's CRM does more than store data. It connects, unifies, and reconciles every customer interaction in real time, enabling precise and relevant actions at every step.

Complete lead traceability

Identify and track every stage of the customer journey, from first discovery to conversion.

Intelligent segmentation

Classify prospects based on their behavior to send targeted, relevant campaigns.

Lifecycle-based campaigns

Trigger scenarios that align your actions with real customer needs at exactly the right moment.

A concrete example

An e-commerce site detects that a visitor has abandoned their cart. Positive User's CRM automatically triggers a re-engagement sequence. If the customer's history shows they respond to discounts, they receive a 10% off offer within minutes. If they don't act, a follow-up with free shipping is sent. Each step adapts to their reaction without anyone on your team lifting a finger.

No-code automation: accessible to everyone

Positive User puts a visual, no-code automation editor in your hands. This intuitive drag-and-drop system lets you design complex scenarios or run A/B tests without any technical expertise. No developers required. Drag, drop, and you're ready.

Omnichannel engagement: be where your customers are

Positive User lets you reach your customers across multiple channels while maintaining a consistent, coherent experience:

- **Personalized emails:** Maximize open and click rates with tailored content.
- **Live chat and chatbots:** Respond instantly while automating routine tasks.
- **Push notifications:** Re-engage customers on mobile or desktop based on their actions.
- **SMS and WhatsApp:** Send direct, high-impact messages, ideal for urgent promotions.
- **Wallet passes:** Deliver digital cards and coupons without requiring a mobile app.

A customer who opens an email but doesn't click can receive a push notification a few hours later. That fluidity between channels is what transforms passive audiences into engaged ones.

Real-world success: Kubota

Kubota, a Polish e-commerce brand known for its iconic slide sandals, faced a challenge familiar to many growing direct-to-consumer businesses: technical limitations with their previous marketing automation tool, disconnected customer touchpoints, and missed engagement opportunities.

After switching to Positive User, the team quickly activated a full suite of automation tools – forms, pop-ups, email campaigns, a chatbot, coupons, web push, and scoring – all without requiring additional development work on their end.

The results were immediate:

Their newsletter database doubled within 6 months, growing 10–15% month-over-month.

+50%
increase in active, engaged recipients within 3 months

35%
open rate

30%
CTR on a targeted campaign

6%
Pop-up CTR

25%
coupon conversion rate on-site

The Kubota case shows just how much a platform like Positive User can transform a marketing strategy even for a consumer brand rooted in a traditional product. Smart segmentation, process automation, and an omnichannel approach allowed Kubota to grow their audience while building lasting customer relationships – and according to the team, they're still only getting started.

Pillar 3:
Features that take your automation further

05

The right features are what transform good intentions into measurable results. Here is what to focus on.

No-code automation: simplify the complex

One of Positive User's greatest strengths is its no-code visual automation editor. This drag-and-drop system makes it possible to design complex scenariosor create A/B testswithout any technical background. It gives every member of your marketing team the ability to work with automation confidently.

A practical example : SaaS onboarding sequence

A SaaS company wants to improve user activation after signup. With Positive User, they build a nurturing sequence in minutes:

1. A welcome email lands within hours of registration.
2. A video tutorial arrives the next day, showing key features.
3. A follow-up one week later if the user hasn't explored specific parts of the product.
4. A personalized offer, based on the features the user engaged with most.

Each step adjusts based on real user behavior, creating a personalized experience that feels human. No-code automation saves time, accelerates campaign deployment, and ensures easy scalability even for the most complex scenarios.

Advanced segmentation and message personalization

Positive User pushes segmentation to a higher level. Beyond classic demographic criteria, the platform incorporates behavioral segments based on real user actions: clicks, cart abandonments, frequent visits, and much more. This is what marketers sometimes call "hot data"signals that reveal intent in real time.

Once segments are defined, you can automate precisely targeted campaigns:

- A user who frequently views a product without buying can receive a personalized offer.
- A loyal customer can be rewarded with a thank-you email and early access to exclusive deals.
- Groups sharing the same behavior or preferences receive campaigns crafted specifically for them.
- Messages are timed to match each customer's individual purchase frequency.

Real-world case: repurchase campaign for an optical retailer

Context: An online contact lens retailer wants to maximize repurchases by anticipating customer needs before they run out.

With Positive User:

- Customers are segmented by average purchase frequency (1 month, 3 months, 6 months).
- An automated email or SMS reminder triggers before their estimated replenishment date.
- Content includes a loyalty reward offer, a subscription proposal for auto-renewal, and a reminder of the discomfort of running out.

Expected results:

- Higher repurchase rates without manual effort.
- Stronger retention through a proactive customer experience.
- Reduced churn from inactive customers.

Personalized campaigns increase conversions by an average of 20%. By combining advanced segmentation with automation, Positive User maximizes the impact of every message while improving ROI.

Performance analysis: adjust and optimize

Data is essential for improving your campaigns. Positive User's dashboards are built from dynamic widgets that offer a real-time overviewfully customizable so each team member sees exactly the metrics they need.

- **Track key KPIs**: open rates, click rates, and conversions.
- **A/B testing**: experiment with different versions to find the winning approach.
- **Advanced segmentation**: identify your most valuable segments and focus your efforts accordingly.

A platform that adapts to every business

Whether you are a startup, an SME, a mid-market company, or a large enterprise, Positive User supports every business regardless of model: B2B, B2C, B2B2C, D2C. Our platform is both flexible and scalable, adapting to the specific challenges of your sector and size.

Sector-specific capabilities:

- E-commerce: Cart abandonment management, behavioral segmentation, re-engagement automation.
- SaaS: Onboarding journey automation, subscription management, and renewal flows.
- Healthcare: Secure tools for sensitive communications, compliant with data privacy regulations.

In combining no-code automation, advanced segmentation, omnichannel engagement, and performance analysis, Positive User transforms your marketing. You move from a reactive approach to a proactive strategy designed to exceed your customers' expectations and reach your business goals.

Pillar 4:
Measure, learn, and keep improving

06

Automation is not a "set it and forget it" task. It is a continuous practice and the brands that win are the ones that stay curious.

Why choose Positive User? Four reasons that matter

An all-in-one solution for centralized management

Unlike platforms that require integrating multiple tools for each aspect of marketing, Positive User offers a complete suite. CRM, CDP, no-code automation, omnichannel engagement tools, and analytics all in one place. One environment, zero fragmentation.

Flexibility and adaptability across all sectors

Positive User is not a one-size-fits-all tool. Its flexibility makes it adaptable to e-commerce, financial services, SaaS, education, healthcare, and beyond. It evolves with your needs, no matter how your business grows.

Dedicated support and personalized guidance

Beyond the technology, Positive User stands out through its proactive approach to customer success. Every client from a small business to a multinational gets dedicated onboarding, technical support, and access to strategic automation expertise.

- Training: personalized sessions to help teams master the platform.
- Technical support: available to quickly resolve issues and answer questions.
- Strategic guidance: automation experts available to help define or refine your strategy.

A performance-first approach to ROI

Marketing automation should pay for itself and then some. By combining advanced segmentation, omnichannel tools, and real-time performance analysis, Positive User helps you maximize marketing efficiency while reducing operational costs.

- **Accelerated conversions:** advanced segmentation and dynamic personalization drive measurable increases in conversion rates.
- **Cost reduction:** automating repetitive tasks and centralizing campaign management reduces both human and technical costs.
- **Higher engagement:** more relevant, better-targeted communications lead to higher open rates, clicks, and interactions.

The metrics that matter

When measuring your automation performance, not all numbers carry the same weight. Focus on metrics that truly reflect engagement and business impact.

Key indicators include open and click rates, which show genuine interest. But you must also monitor negative signals: spam complaints, unsubscribes, and bounce rates. Don't obsess over a single campaign. A single poor result can happen for external reasons. The truth lies in long-term trends.

How to respond when performance dips

It happens to everyone. Open rates drop, clicks decrease, or conversion stalls. The problem itself matters less than how quickly and intelligently you respond.

If engagement rates fall

Refresh your subject lines, reconsider your sending frequency, and temporarily prioritize your most active segments to restore positive signals.

If conversions stall

Review your segmentation. Are you sending the right message to the right people? A more targeted approach with better timing usually makes the difference.

If bounce rates rise

This is a data hygiene alert. Clean your list, validate new signups, and ensure your automation rules are not targeting outdated contacts.

Keeping your audience active

Your audience is only as valuable as the people actively engaging with it. Inactive contacts do more than just take up space; they dilute your performance signals and risk dragging your overall results down.

That is why a reactivation strategy is essential. Use preference centers that let contacts choose their own frequency and topics. Implement sunset policies to automatically remove people who have been silent too long. And use engagement-based segmentation to make sure your most active audience always receives your best content.

Your contact base should evolve and mature over time, not just accumulate numbers. Quality always wins over quantity in the long run.

Staying ahead of what comes next

The world of marketing automation changes constantly. Algorithms update, privacy regulations evolve, and consumer habits shift. The brands that maintain strong performance in the long run are not necessarily the most technical; they are the ones who remain curious, informed, and ready to adapt.

> Marketing automation is not just a technical topic. It is an ongoing conversation between you, your audience, and the platforms connecting you. The more that conversation is grounded in listening, consistency, and relevance, the more likely your marketing is to drive results that actually matter.

Conclusion: An automation approach built on trust and results

When you consistently focus on data quality, relevant content, and a thoughtful approach to segmentation, automation stops being a problem to manage. Instead, it becomes the natural outcome of how you communicate.

Whether it is a cleaner list, a smarter workflow, or a better-timed message, every small improvement compounds into stronger performance and a more loyal audience.

You don't need to revolutionize everything at once. Real success in marketing automation comes from the ability to observe, adjust, and improve step by step.
Ultimately, great automation is simply a reflection of how well you understand and respect your audience. If you put their experience first, your results will follow.

About Positive User

Positive User is an all-in-one customer engagement platform designed to help teams communicate clearly, personally, and consistently across every channel. From email and SMS to WhatsApp, chat, and push notifications everything is managed from a single, unified workspace.

We make automation simple and human. By leveraging a native Customer Data Platform and advanced segmentation, you can send messages that are both relevant and timely, ensuring you reach each person with the right context.

Whether you are in marketing, sales, product, or support, Positive User gives you the flexibility to build meaningful experiences at scale without the usual complexity. Our goal is to help you work smarter, faster, and more human.

Our mission is clear: to support you in creating authentic connections throughout the entire customer journey, from the very first visit to long-term loyalty.

Ready to take the next step?

Do you need a new marketing automation solution, or want to know how Positive User integrates with your existing tools?

Request a demo