STRETCHLEARN · WORKBOOK

Email Automation & Sequences — Workbook

This workbook turns the course into a build. Section by section, you will map your subscriber lifecycle, draft and time real sequences, define your behavioral segments, and set up the metrics and tests that keep your flows improving. Work through it with your actual list and tool open, and you will finish with live, revenue-driving automations rather than notes.

Foundations of Email Automation

Map your subscriber lifecycle and decide which flows to build first, in order of return.

Exercise: Map Your Subscriber Lifecycle

On paper or a whiteboard (not in your email tool yet), draw the five lifecycle stages across the top: Subscriber, Engaged, Customer, Repeat/Loyal, Lapsed. Under each stage, name the automation(s) that belong there for your specific business. Then answer the prompts below.

• What single event turns a stranger into a Subscriber for you (a sign-up form, a lead magnet, a checkout email field)?

• Which two flows in your map touch revenue most directly, and therefore should be built first?

• Where in your current setup is a stage completely uncovered by any automation right now?

• What product or content naturally moves someone from Customer to Repeat (a replenishable item, a next-tier offer)?

Worksheet: Flow Priority Scorer

List every automation you are considering. For each, rate expected revenue impact and build effort from 1 to 5, then compute a priority order. Build highest-impact, lowest-effort flows first.

Flow name

Lifecycle stage it serves

Trigger event

Expected revenue impact (1-5)

Build effort (1-5)

Priority rank (impact minus effort)

Target build week

Checklist: Before You Open the Tool

[ ] Lifecycle map drawn with all five stages labeled
[ ] At least one automation named under each stage
[ ] Two highest-ROI flows circled (usually welcome and cart recovery)
[ ] Build order written for the next four weeks
[ ] Confirmed which stages are currently uncovered

Building Your First Sequences

Set up your tool correctly, then draft and time a complete welcome sequence with a conditional split.

Checklist: Tool and Deliverability Setup

[ ] Chosen a platform that fits the business (Klaviyo for e-commerce, ConvertKit/Kit for creators, Mailchimp/HubSpot for general)
[ ] Double opt-in enabled on the main sign-up form
[ ] SPF, DKIM, and DMARC DNS records added and verified in the tool
[ ] Recognizable from-name set (a real person at the brand)
[ ] Reply-to address points to an inbox a human checks
[ ] Sent a test sign-up to confirm the confirmation email arrives in the inbox, not spam

Worksheet: Welcome Sequence Planner

Plan each email in your welcome flow before building. Fill one row per email. Add the conditional split before the final email so buyers are skipped or routed to a thank-you.

Email number

___

Delay before this email

___

One core idea (story, social proof, offer)

___

Subject line (30-50 characters)

___

Preview text

___

Single call to action

___

Condition or split applied (yes/no, and rule)

___

Exercise: Write Subject Lines That Earn the Open

Draft three subject-line options for welcome Email 1 and three for Email 4. Keep each 30-50 characters, front-load the value, and write deliberate preview text for your favorites. Pick a winner for each and note why.

• Which Email 1 subject names a concrete reward and a next step (for example, the discount code plus where to start)?

___

• Which Email 4 subject creates honest urgency without sounding desperate?

___

• For each winner, what does the preview text add that the subject line does not?

___

• Where did you accidentally pack more than one idea or ask into a single email, and how will you split it?

___

Checklist: Pre-Launch Flow Test

[ ] Trigger set to the correct live sign-up list
[ ] Flow kept in draft/manual mode while building
[ ] Conditional split added before the final discount-reminder email
[ ] Each email has exactly one primary call-to-action button
[ ] Sent yourself through the full flow with a test address
[ ] Confirmed delays, personalization, and links all render correctly

Behavioral Triggers and Segmentation

Build the behavior-triggered revenue flows and define the segments that make every message relevant.

Worksheet: Abandoned-Cart Sequence Builder

Design your cart-recovery flow. Lead with reminders and value; reserve any discount for the final email. Add an exit condition for anyone who completes the purchase.

Trigger (abandoned cart vs. abandoned checkout)

Email 1 timing (e.g., 1 hour) and message

Email 2 timing (e.g., 24 hours) and objection handled

Email 3 timing (e.g., 48 hours) and urgency/incentive

Dynamic product block included? (yes/no)

Exit condition on purchase completion (yes/no)

Call-to-action destination (pre-filled cart URL)

Exercise: Design Your Post-Purchase Flow

Plan a post-purchase sequence that confirms, educates, requests a review, and sets up the next purchase. Time each step to actual delivery and the product's real consumption rate.

• What will your enhanced order confirmation say beyond the receipt (expectations, what happens next)?

• What usage tips or care instructions can you send a few days after delivery to reduce returns?

• How many days after delivery should the review request go out, given real usage time?

• What is the product's consumption cycle, and when should a replenishment or cross-sell nudge fire?

Worksheet: Segment Definition Sheet

Define the behavioral segments you will use as entry, exclusion, and branch conditions inside flows. Write the exact rule for each so it can be built directly in your tool.

Segment name

Type (dynamic segment vs. tag)

Exact rule (e.g., no opens in 90 days; spent over $200)

Flows that use it (entry, exclusion, or branch)

Approximate current size

Engagement tier (engaged / passive / unengaged)

Checklist: Behavioral Flow Quality Check

[ ] Cart flow pulls the actual abandoned products dynamically
[ ] No discount given in the first cart-recovery email
[ ] Purchase-completion exit condition on every revenue flow
[ ] Browse-abandonment kept to one or two helpful, low-pressure emails
[ ] Review request timed to delivery plus real usage, not ship date
[ ] Engagement tiers defined (engaged, passive, unengaged) for later use

Retention, Measurement, and Optimization

Re-engage lapsed contacts, protect deliverability, and set up the metrics and tests that compound results.

Worksheet: Win-Back and Sunset Flow Planner

Define when a contact counts as lapsed, then plan the three win-back emails and the sunset rule that suppresses anyone who never re-engages.

Lapsed definition (days with no opens/clicks)

Entry segment rule

Email 1 — soft reminder message

Email 2 — incentive offered

Email 3 — honest last call / consent ask

Sunset action (suppress vs. unsubscribe) and trigger

Checklist: Deliverability and List Hygiene

[ ] SPF, DKIM, and DMARC verified and passing
[ ] Spam-complaint rate monitored and kept below 0.3% (ideally under 0.1%)
[ ] One-click unsubscribe present and obvious in every email
[ ] Hard bounces removed automatically (confirmed in tool settings)
[ ] Win-back and sunset flows running on a regular cadence
[ ] New sending domain warmed up gradually, not blasted day one

Worksheet: Flow Metrics Scoreboard

Record baseline metrics for each live flow so you can spot what to fix. Anchor decisions on revenue per recipient and conversion, not opens.

Flow name

Open rate (directional only)

Click-through rate

Conversion rate

Revenue per recipient

Unsubscribe / spam-complaint rate

Biggest weakness to test next

Exercise: Plan Your First A/B Test

Choose one flow and design a single-variable A/B test. Change one thing only, decide the success metric in advance, and let it run to a meaningful sample before adopting the winner.

• Which one variable will you test (subject line, first-email timing, discount or not, CTA wording)?

• What is the success metric, decided in advance (usually CTR or conversion, not opens)?

• How will you know each variant has a large enough sample to trust the result?

• Once you have a winner, what is the next single test you will run in this flow?

Your Action Plan

1. Draw your five-stage lifecycle map and name the automation for each stage.
2. Score and rank candidate flows by impact minus effort; commit to a four-week build order.
3. Set up your tool: enable double opt-in and verify SPF, DKIM, and DMARC before writing any copy.
4. Build and launch a four-email welcome flow with a conditional split that skips buyers.
5. Build the abandoned-cart (or checkout) flow with a 1-hour / 24-hour / 48-hour cadence and a purchase exit.
6. Build a post-purchase flow: enhanced confirmation, usage tips, a delivery-timed review request, and a replenishment nudge.
7. Add a browse-abandonment flow of one or two low-pressure emails for known subscribers.
8. Define your behavioral segments (engagement tiers, purchase behavior, value) and wire them into flow conditions.
9. Launch win-back and sunset flows; suppress contacts who never re-engage to protect deliverability.
10. Stand up the metrics scoreboard, run one single-variable A/B test per flow, keep winners, and repeat monthly.