

Marketing Automation — Workbook

This workbook turns the course into a working setup inside your platform. Section by section, you will structure your contact data, build a lead-scoring model, assemble branching workflows, map a full lifecycle journey, and stand up the metrics that keep it improving. Work through it with your actual HubSpot, ActiveCampaign, or Klaviyo account open, and you will finish with live automations and a system you can measure — not just notes.

What Marketing Automation Actually Is

Pick the right platform and build the clean data foundation every workflow reads from.

Exercise: Choose Your Platform on Purpose

Before building anything, decide which platform fits your business and write down why. Use the decision logic from the course (Klaviyo for online stores, HubSpot for sales-team CRM needs, ActiveCampaign for deep automation on a budget) and answer the prompts honestly.

- Do you sell products through an online store and need revenue tracked per flow, or is this a service/B2B model?

- Do you have a sales team that needs one shared contact record with deals and pipeline?

- What is your realistic monthly budget, and what contact count are you starting with?

- Which platform did you pick, and what is the single biggest reason it fits over the other two?

Worksheet: Contact Property Plan

List the properties (custom fields) your automations will read from and write to. Define each one before building so workflows have clean inputs. Use dropdown/enumerated types wherever possible to prevent messy free-text variants.

Property name

Type (text / number / dropdown / date)

Used as input, output, or both

Allowed values (for dropdowns)

Which form or source populates it

Default value if blank

Checklist: Data Hygiene Setup

- Lifecycle stage property exists with defined stages (Subscriber to Customer)
- Lead source property captures how each contact entered
- Lead score property created (numeric) for the scoring model to write to
- Key fit fields defined (industry, company size, role, or country)
- Country/region and other categorical fields use dropdowns, not free text
- Duplicate contacts merged so no one is enrolled or scored twice
- Double opt-in or list validation enabled so invalid emails never enter
- Every form field mapped to a known property, not a stray one

Lead Scoring and Qualification

Build a fit-plus-behavior scoring model, set a threshold, and wire the qualification handoff.

Worksheet: Lead Scoring Model Builder

Build your model backwards from your best customers. Assign positive points to fit attributes and buying behaviors, and negative points to poor-fit signals and disengagement. Keep it to roughly a dozen rules for version one.

Criterion (attribute or action)

Category (fit / behavior / negative)

Points (+/-)

Why this predicts a sale

Decay rule (does it reduce over time?)

Platform field or event it maps to

Exercise: Set Your Qualification Threshold

Decide the score at which a contact becomes a Marketing-Qualified Lead and define exactly what happens when they cross it. The threshold is the handshake between marketing and sales, so set it deliberately.

- What point total marks a contact as marketing-qualified, and how did you choose that number?

- Which actions should fire the instant a contact crosses it (stage change, sales notification, owner assignment, nurture exit)?

- How will you handle a high-behavior but low-fit contact so they do not falsely qualify?

- After 30 days, how will you check whether the leads crossing the threshold actually convert, and adjust?

Worksheet: Lifecycle Stage Definitions

Write the precise definition and owning automation for each lifecycle stage so the whole team uses them the same way. The stage property is only useful if everyone means the same thing by it.

Stage name (Subscriber, Lead, MQL, SQL, Opportunity, Customer)

Plain-language definition

Entry trigger (what moves a contact into it)

Owning workflow or automation

Who owns the contact at this stage (marketing or sales)

Exit condition (what moves them to the next stage)

Checklist: Scoring & Handoff Quality Check

- Fit and behavior scored as separate dimensions
- Negative points strip out students, job seekers, and disengaged contacts
- Behavior points decay so old clicks count less than recent ones
- Threshold set and built as a workflow trigger
- Score-to-MQL workflow updates lifecycle stage automatically
- Sales is notified and a specific owner is assigned, not a shared inbox
- Qualified contacts are removed from passive nurture on handoff

Building Workflows That Branch

Assemble a real branching workflow from triggers, conditions, actions, delays, and goals, and guard it against the common traps.

Worksheet: Branching Workflow Planner

Plan your welcome-and-nurture workflow step by step before building. Map the engaged and not-engaged branches, the scoring actions, and the goal that exits qualified contacts. Lay out the skeleton here, then build the empty steps in your tool.

Step number

Step type (trigger / action / condition / delay)

Detail (email idea, branch question, delay length, property set)

Branch path (engaged / not engaged / both)

Score change at this step (+/-)

Goal or exit applied here?

Exercise: Define Triggers, Conditions, and the Goal

For your workflow, write out the four building blocks explicitly so the logic is clear before you drag a single step. A workflow you cannot describe in plain sentences is one you should not launch.

- What exact event enrolls a contact (form fill, list join, score crossed, stage change)?
- What is the central condition that branches the workflow, and what are the yes/no paths?
- What goal pulls a contact out early once the workflow has succeeded (MQL, demo requested, purchased)?

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- What exclusion keeps existing customers or active sales contacts out of this prospect nurture?
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Checklist: Trap-Prevention & Pre-Launch Review

- Traced every branch end to end with no dead-ends or loops
- Enrollment/re-enrollment settings prevent a contact piling up in the same workflow
- Listed other workflows that can enroll this audience and confirmed exclusions prevent overlap
- Frequency cap or global suppression set so contacts are not over-mailed across flows
- Confirmed branch conditions read properties that are actually populated, with a default path
- A goal and an unsubscribe exit exist so contacts leave when they should
- One clear call-to-action per email
- Walked a test contact through every branch before going live

Full Journeys, CRM, and Optimization

Stitch workflows into one lifecycle journey, agree the sales handoff, and run the measurement-and-improvement loop.

Worksheet: Lifecycle Journey Map

Chain your individual workflows into one continuous journey using lifecycle stage as the spine. Each workflow should enroll on entering a stage and exit on leaving it, so contacts are never in two legs at once.

Lifecycle stage

Workflow that owns this leg

Enrollment trigger (stage entered)

Goal that hands off to the next leg

Next stage and next workflow

Gap or overlap risk to watch

Exercise: Agree the Marketing-to-Sales Handoff

Define the handoff with sales before you automate it. Write down the shared definitions and commitments so automation can enforce a real agreement, not a guess.

- What exact criteria define an MQL and an SQL, agreed jointly with sales?

 - What is the routing rule (territory, round-robin, product) for assigning qualified leads?

 - How fast does sales commit to first contact, and how will automation escalate a missed follow-up?

 - What happens to leads sales rejects — how are they recycled into nurture with a reason captured?
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Worksheet: Automation Metrics Scoreboard

Record baseline metrics for each live workflow so you can find what to fix. Anchor decisions on conversion, stage progression, and revenue — treat opens as directional only.

Workflow name

Enrollment volume

Workflow conversion rate (% hitting the goal)

Stage progression (contacts advancing to next stage)

Time to conversion

Revenue or pipeline influenced

Weakest step to test next

Checklist: Optimization Loop Discipline

- Located the workflow or stage with the lowest conversion or biggest drop-off
- Wrote one clear hypothesis for the change
- Changed only one variable so the cause of any lift is known
- Let the test run to a meaningful sample, judged on clicks/conversion not opens
- Adopted the winner and documented the lesson
- Scheduled a recurring monthly review to repeat the loop
- Closed-loop reporting in place to trace sources/workflows to actual customers

Your Action Plan

1. Choose your platform (Klaviyo, HubSpot, or ActiveCampaign) and write down why it fits your business model.
2. Set up core properties — lifecycle stage, lead source, lead score, fit fields — and clean existing data with dropdowns and dedupe.
3. Build a lead-scoring model of about a dozen rules, scoring fit and behavior separately, with negative points and decay.
4. Set a marketing-qualified-lead threshold and build the score-to-MQL handoff workflow that notifies and assigns sales instantly.
5. Build a branching welcome-and-nurture workflow with an engagement split, scoring actions, and a goal exit.
6. Run the pre-launch trap review: check loops, overlapping enrollment, over-mailing, stale conditions, and missing exits.
7. Map your full lifecycle journey, chaining workflows by lifecycle stage with goals that feed the next leg.
8. Connect automation to your CRM and agree the MQL/SQL definitions, routing, and follow-up time with sales.
9. Stand up the metrics scoreboard tracking enrollment, workflow conversion, stage progression, and revenue.
10. Run one single-variable test per month on the weakest step, keep winners, and repeat the improvement loop.

