

E-commerce Email Flows — Workbook

This workbook turns the course into a working flow library you can launch for a real store. You will map your customer lifecycle to triggers, draft and time each of the five core flows, set the exit conditions that keep customers happy, and put a measurement and testing system in place. Fill in the worksheets and templates as you build so you finish with both the skill and a complete, documented automation system ready to switch on.

The Lifecycle and the Five Core Flows

Map your store customer journey to concrete triggers and exit conditions, and confirm the data and deliverability your flows depend on.

Worksheet: Lifecycle-to-Trigger Map

For each lifecycle stage, write the single trigger event that starts the flow and the one action that should make a customer exit. This becomes the blueprint for every flow you build.

Stage (e.g. new subscriber)

Flow name

Trigger event (e.g. Subscribed to List)

Behavioural or property trigger?

Exit / skip condition (e.g. Placed Order)

Channel (email / SMS / both)

Exercise: Find Your Hidden Flow Revenue

Pull your last 30 days of email revenue from your platform and split it between campaigns and flows. Write down the gap versus the 25 to 35 percent benchmark for automations.

- What share of your email revenue currently comes from flows versus one-off campaigns?
- How far is that from the 25 to 35 percent benchmark, and which missing flow would close the gap fastest?
- Which single flow do you expect to earn the most for your store, and why?

Checklist: Data and Deliverability Readiness

- Store-to-ESP integration is live and passing events
- Viewed Product, Added to Cart, Started Checkout, and Placed Order all appear in the activity feed
- Signup popup is live with a clear incentive (target 2 to 5 percent conversion)
- Sending domain authenticated with SPF, DKIM, and DMARC

- [] Sending from a branded domain, not a free address
- [] One-click unsubscribe enabled and honoured instantly
- [] Sunset policy set to stop emailing non-openers after 90 to 120 days
- [] One full test order completed and flow emails landed in the inbox

Welcome and Browse Abandonment Flows

Draft the two top-of-funnel flows and the subject-line and copy approach that earns the open and the click.

Worksheet: Welcome Series Planner

Plan each email in your welcome sequence. Keep every email to one job and one button, and confirm the buy-now exit condition is set.

Email number

Send delay from signup

Job of this email (deliver offer / brand story / proof / objections / urgency)

Subject line draft

Primary call to action

Incentive included? (Y/N)

Exit on purchase set? (Y/N)

Exercise: Browse Abandonment Draft

Write a one or two email browse abandonment flow. Use the exact viewed product, a low-pressure tone, and no discount. Confirm it stops the moment the visitor adds to cart.

- What send delay will you use for email one (one to two hours is typical)?

- Which trust element (free returns, a review snippet) will you include to lower risk?

- What exit conditions prevent this flow colliding with your cart flow?

Worksheet: Subject Line and Copy Framework Sheet

For each flow email you write, record the subject line, preview text, and the copy framework used. Keep subject lines under about 40 to 50 characters.

Flow and email number

Subject line (under 50 chars)

Preview text

Copy framework (PAS / AIDA / one-job-one-button)

Single benefit led with

Primary call to action

Checklist: Top-of-Funnel Flow Quality Check

- Welcome email one delivers the promised incentive within seconds
- Each welcome email has one job and one primary button
- Anyone who buys exits the welcome flow into post-purchase
- Browse flow shows the exact product viewed, dynamically
- Browse flow uses no discount and a low-pressure subject line
- Browse flow stops on Added to Cart and on Placed Order
- Subject lines under 50 characters and preview text written deliberately
- Every email written to one reader, benefit before feature

Cart Abandonment and Post-Purchase Flows

Build the highest-intent recovery flow and the post-purchase sequence that earns reviews, repeat orders, and higher order value.

Worksheet: Cart Abandonment Sequence Planner

Plan your three-email abandonment flow. Hold the discount back to the final email and confirm the flow stops the instant an order is placed.

Email number

Send delay from abandonment

Angle (reminder / objection-handling / incentive)

Subject line draft

Incentive (none / free shipping / percent off)

Dynamic cart items shown? (Y/N)

Exit on Placed Order set? (Y/N)

Exercise: Time Your Post-Purchase Around Delivery

Map your post-purchase flow to your actual average shipping time so the review request lands a few days after delivery, not after the order.

- What is your average order-to-delivery time, and when should the review request send?
 - What education will email two include to lower returns and raise satisfaction?
 - Is your product consumable? If so, what replenishment interval will you use?
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Worksheet: Cross-Sell and AOV Planner

For your top products, plan the logical cross-sell or upsell to recommend after purchase. Record AOV before so you can measure the lift later (leave the after and change cells empty until you have data).

Product purchased

Logical cross-sell or upsell

Why it fits (one line)

Margin of recommended item

Free-shipping threshold to surface

AOV before (record now)

AOV after (leave empty until measured)

Checklist: Purchase-Moment Flow Quality Check

-] Cart email one sends 1 to 4 hours after abandonment with no discount
-] Cart emails show the actual abandoned items dynamically
-] Discount, if used, appears only in the final cart email
-] Cart flow stops the instant the order is placed
-] Post-purchase email one confirms order and sets shipping expectations
-] Review request timed to land a few days after expected delivery
-] Cross-sell recommends a complementary item, not a random one
-] Replenishment reminder timed to real consumption cycle (if applicable)

VIP, Winback, and Measuring Performance

Reward best customers, revive lapsed ones, and put revenue-per-recipient measurement and A/B testing in place.

Worksheet: VIP and Winback Definition Sheet

Define VIP and lapsed concretely for your store using recency, frequency, and monetary value. Base the lapsed threshold on your own average time between orders.

Average time between orders (days)

VIP definition (orders / spend / predicted CLV)

VIP reward (status, early access, gift)

Lapsed threshold (days since last order)

Winback email count

Winback final-email incentive

Sunset threshold (days, 90 to 120)

Exercise: Plan Your First A/B Test

Choose your highest-revenue flow and design one test that changes a single variable. Match the metric to the change and decide how long to run it.

- Which flow will you test first, and why (hint: where the money already is)?

- What single variable will you change (subject line, delay, or offer)?

- Which metric will judge the winner, and how long will you let it run?

Worksheet: Flow Performance Scorecard

Record the key numbers for each flow on a monthly cadence. Leave revenue per recipient empty and compute it yourself from revenue divided by recipients.

Flow name

Recipients (last 30 days)

Click rate

Conversion rate

Total revenue

Revenue per recipient (leave empty, you calculate)

Status (firing / broken)

Checklist: Measurement and Optimisation Routine

- Revenue per recipient tracked for every flow
- Welcome flow has the highest open and click rates
- Cart flow has the highest revenue per recipient
- VIP segment excluded from heavy discount campaigns
- Winback paired with a sunset policy for non-openers
- A/B tests change one variable at a time and run long enough
- Every test and result documented in a private playbook
- Monthly review confirms no flow has quietly broken

Your Action Plan

1. Confirm your store-to-ESP integration is live and that Viewed Product, Added to Cart, Started Checkout, and Placed Order events are arriving.
2. Authenticate your sending domain with SPF, DKIM, and DMARC, set a branded from-address, and enable one-click unsubscribe.
3. Write your lifecycle-to-trigger map, naming the trigger and exit condition for all five flows before building anything.
4. Build the welcome series first, starting with a perfect email one that delivers the incentive, then add brand story, proof, objections, and urgency.
5. Build the cart abandonment flow next, three emails over 72 hours, discount held to the last email, exiting the instant an order is placed.
6. Add the browse abandonment flow as one or two low-pressure, no-discount emails that stop on Added to Cart.
7. Build the post-purchase flow timed around delivery: thank-you, education, a review request, then a logical cross-sell or replenishment reminder.
8. Define VIP and lapsed segments using recency, frequency, and monetary value, then build the VIP reward flow and the three-step winback.
9. Set a sunset policy to stop emailing contacts who have not opened in 90 to 120 days, protecting deliverability for everyone else.
10. Track revenue per recipient monthly, run one single-variable A/B test on your highest-earning flow, keep the winner, and repeat.

