

## A Primer on Email-Marketing Automation

June 30, 2020

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Email marketing has been around for decades, but it's far from dead. Not only is it still going strong, but it is more effective than ever. As technology continues to advance, email-marketing strategies can become more personalized and effective.

Marketing automation is the key to this progress.

My series, *The Financial Advisor's Guide to Email Marketing*, helps financial advisors understand how email marketing works so they can properly use financial email marketing strategies to connect with prospects and gain more clients.

I've covered all of the essentials of email marketing in previous articles in this series.

Now I'll show you how to take your email marketing to the next level with automation.

### What is email-marketing automation?

By using email-marketing automation, you can create and send relevant, timely, and personalized emails to the subscribers on your list automatically, based on criteria you set that aligns with your email-marketing strategy.

Rather than being confined to sending out broadcast emails – sometimes referred to as email “blasts” – email-marketing automation sends the right messages to the right people at the right time.

Whereas blasts go out to every subscriber on your list at the same time, automation allows you to choose which subscribers get which messages and when, and that can make your campaigns more effective.

By nurturing prospective clients with highly personalized content, you engage and serve them individually from the start. When marketing automation is done effectively, email campaigns help you book appointments, fill seminars, pre-qualify prospects, or even sign new clients.

Email-marketing automation works by segmenting subscribers into different lists or with tagging, based on the information they submit or their behavior.

For example, you can trigger specific emails based on the answers subscribers submit in a form, demographic information such as their geographic location, preferences, or behaviors such as opens, clicks, purchases, or visiting a web page.

### What is an email-marketing automation strategy?

When someone signs up for your newsletter or opts-in for a free giveaway, the first email they receive is an “autoresponder.” Traditionally, once they receive the thank you message or download, the next time they hear from the company will be the next time the company's newsletter is sent.

With automation, you could send a welcome or nurture sequence of follow-up emails to new subscribers, introducing yourself, sharing more information about your firm and providing additional content relevant to the free giveaway they subscribed to get.

You could also send the follow-up sequence only to the people who opened the thank you email or only to the people who clicked the link to download the free report.

Another option would be to send a survey asking about their most pressing concerns or interests. If they indicate that they



are most interested in improving their personal finances, you can send a follow-up sequence about household budgeting and paying off debt. If they indicate that they are interested in saving for their child's education, send articles about college savings plans.

Email-marketing automation can also be used to supplement your other marketing efforts. If you put on a seminar or workshop, you don't have to follow up with each attendee individually. Instead, you can set up a sequence in advance to connect with participants and reuse the same sequence each time you present on that topic.

For example, the next morning, they would get an email thanking them for attending, a link to the slides and a request for feedback. The following day, send a follow-up email with frequently asked questions that tend to come up during or after the workshop. A few days later, send a guide or worksheet that helps them address a challenge covered in the workshop. Then, if you notice they've been opening your emails, send an invitation to book a free consultation or pick up the phone to call them.

### **How else can you use automation?**

In addition to nurturing new subscribers, email-marketing automation provides many creative opportunities to connect with your list, colleagues, prospects and clients.

Use automation during your new-client onboarding. Right after they've signed on to work with you, they are most emotional about their decision. If they are excited, sending them an automated series of relevant content about your firm, their challenges, and each next step can reinforce their enthusiasm and begin to turn them into a brand ambassador.

If they are second-guessing their decision, providing automated onboarding and follow-up will reassure them that they are in professional and capable hands.

Another way to use email-marketing automation is to power your referrals. Although many financial advisors claim that the majority of their clients come from referrals, few have a process in place to ask for referrals consistently. Automating your requests for referrals from satisfied clients and strong referral partners is an effective way to keep referrals coming in the door.

### **Conclusion**

From the subscriber's perspective, the most effective email marketing automation is welcomed and feels like a personal service that is tailored to address their challenges and meet their needs. Even though most people will recognize that the messages are automated, using email automation strategically demonstrates that you are in tune with what they want and you are prepared to serve them well.

Depending on your needs and the level of sophistication required for the automation strategies you want to deploy, carefully consider which email service provider (ESP) to choose, as each one has slightly different email-automation offerings.

This is the final article in my series, *The Financial Advisor's Guide to Email Marketing*. To view all the articles in my series, click [here](#). For additional help getting started with your email marketing strategy, schedule an introductory meeting and see how Crystal Marketing Solutions can help.

Download a free copy of the **Email Marketing Checklist & Template** [here](#).

*Sometimes email marketing can seem like an overwhelming task to undertake on your own. This is exactly what we do for our clients! We help craft opt-ins to build their email lists and create captivating email marketing campaigns to engage with their audience in the most effective way possible. Let us help you get a handle on the whole process by scheduling an introductory meeting today.*

*Crystal Lee Butler, MBA is a creative marketer and results-oriented business consultant with over a decade of experience collaborating with independent advisers. At Crystal Marketing Solutions, she delivers exceptional insights for financial professionals enabling them to create a consistent marketing presence so they can focus on the things that matter most to them.*