



# eCommerce Email Automation Guide

Boost Efficiencies & Scale Your Online Store





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# Introduction

In the last year, ecommerce has grown exponentially. And there's no sign of it slowing down.

## Is your online store ready to scale?

Automating communication can increase engagement and trust with shoppers, improve efficiencies, provide data insights on customer engagement, and lessen the burden on your employees to manage every customer relationship manually.

What are the best ways to automate communication in ecommerce? How do you get started and how does it all work? Read this guide for a breakdown of the email automation basics for ecommerce.





## Part 1

# Build Your Email List

Before you communicate with anyone, you'll need people to communicate with – and that means building an email list. In this section, we'll cover some of the tools you can use to do it.

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# Define Your Audience

When you start on the journey of automating your ecommerce comms, consider the first rule of any kind of marketing and communication: know your audience. After all, if you don't know who you're talking to or what they want, how will you know what to talk to them about? Here are two top tools you can use to better understand your audience:

### 1 Market Research

Do research to get a feel for the people you're communicating with. There are multiple ways of doing this, including:

- **Ask your clients directly** via a survey or a one-on-one conversation.
- **Use existing research** like a national census or reports published by others.
- **Watch your competitors**, so you can learn from their successes and failures.
- **Mine reviews** on similar products and services to learn what people want.
- **Use Google Analytics** to track site visitors by age, gender, location, etc.
- **Analyse social engagement**, like comments on your social media posts.

### 2 Client Personas

Client personas are archetypes of the people who will likely shop at your store. Creating them puts names, faces, and character traits to segments of your audience; helping you connect with them personally. Include characteristics like:

- **Name of the persona.** Something realistic.
- **Job title.** The best source for this info is customer surveys.
- **Demographics.** Use Google Analytics or online surveys.
- **Goals and challenges.** Look for results from real customer interviews.
- **Values and objections.** Use insights from your existing clients.
- **Marketing content.** Create messages tailored specifically for them.
- **Additional persona info.** These depend on your industry and business type.

Read more about these tools in our [Content Marketing Strategy Guide](#), where we share detailed tips on pre-planning a content strategy.

**Tip** Understanding a B2B client is more complex than a B2C client, as the needs of different departments are varied. For instance, the Head of Marketing will have different needs to the Heads of IT or HR. Consider all decision makers in your planning.

## Part 1 Build Your Email List

# Create & Grow Your List

Building a profitable email list from scratch is no easy feat – but it's worth it. Here are a few reasons why.



### Email Can Be Hyper Targeted

As you'll learn in this guide, hyper-personalisation and segmentation mean that every email you send can be personalised to every individual, even in niche segments.



### You Own Your Email List

No matter what event, process, or policy shakes the world next, you own your email list. You don't own Google, Facebook, or Instagram. And email technology is available to anyone.



### Billions of People Use Email

According to [Statista](#), just over 4 billion people used email in 2020; a number that's forecast to reach 4.6 billion in 2025 and [includes people of all ages](#). In fact, [they all prefer it](#).



### It Increases Engagement

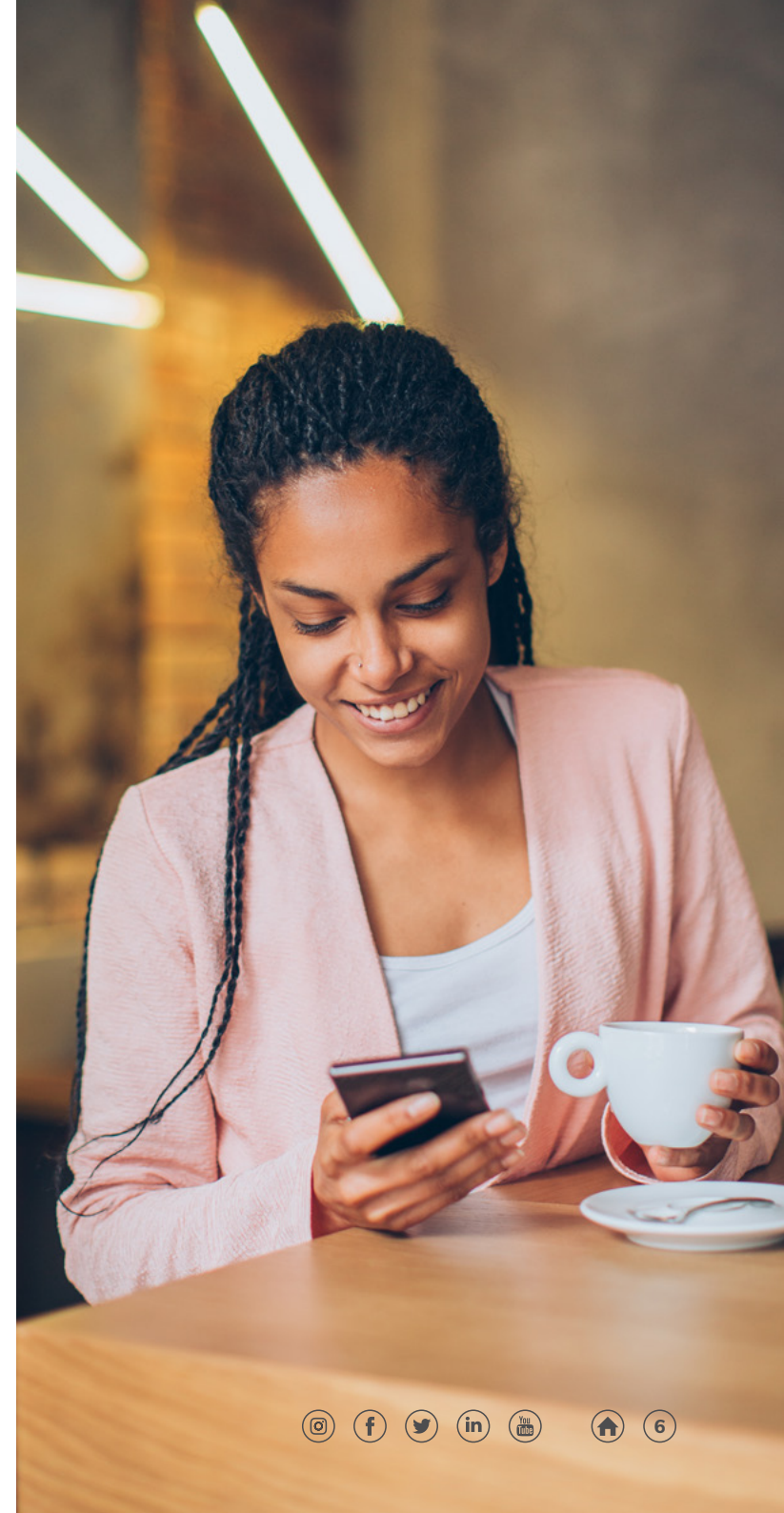
Compared to buying an email list (which can be illegal without consent, but many companies still do it anyway), an email list built directly by you maximises engagement.

This boosts sales potential because subscribers know you and want to hear from you. It [can even reduce your future emails' chances of landing in spam](#).



### You Know What Subscribers Want

Well, you're more empowered to figure out what they want, at least. An illegally bought list is spray and pray and will probably get you into trouble. A 'meh' outcome isn't worth that risk.





## Part 1 Build Your Email List

# Create & Grow Your List (cont.)

There are several ways to grow an email list. Here are some of them.



### Subscription Forms

Subscription forms are the standard way of capturing subscribers to your email list.

Use a short, enticing call-to-action (or even a discount on their first purchase) to encourage them to subscribe.

#### Tip

Gather the most important info you need upfront (like name and email address) and keep the form as short as possible. This increases the chances of people completing it.



### Website Pop-Ups

You've seen them before – they pop up on websites, encouraging people to subscribe, download, or cash in on a special deal. These can be very effective at getting website visitors' attention, so use them wisely.

#### Tip

Be careful not to overuse them, as too many can feel spammy to visitors – and that's the last thing you want them to feel.



### Competitions

Competitions, with the right opt-in agreements and managed expectations, are a great way to grow your database.

#### Tip

Run the campaigns on your website, across your social channels, and even as Google banners, to get it rolling fast.

Leverage Google to grow your list. Read our blog post, [Using Paid Search to Build Your Email Database](#), to find out how.

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A group of people are sitting on concrete steps. They are holding various shopping bags, including white, brown, and striped ones. Some are using mobile devices: a tablet and a green smartphone. They are wearing casual clothing like jeans and t-shirts. The image has a semi-transparent overlay with text.

## Part 2

# Segment Your Email List

If you sell more than one item in your ecommerce store, you'll likely have customers with at least two different needs. When you have hundreds or thousands of products, the interests of your customers can get much broader and more diverse.

This is why it's so valuable to segment your email list into groups of people with similar interests; so, when you communicate with them, you speak directly to what they're looking for. You can do this by collecting data on your customers when they sign up, or as you build your relationship with them.

In this section, we'll chat about the different ways you can segment your lists.



# Demographics & Interests

**Demographics** can make a big difference to what products each shopper will be interested in. For instance, if you're a fashion retailer, your male clients will likely want different items to your female ones. Sending both men and women the same content probably won't get as much engagement as if you sent them items more aligned to their needs and interests.

There are many demographics to consider when segmenting your list – which ones you use will depend on your business and the data you collect from customers. Some common ones include:

- Gender
- Age
- Location
- Marital status
- Income level
- Occupation

**Customer interests** go a bit deeper by getting very specific about what customers want. This is another way to segment your data and customise your messaging so it's aligned to what your shoppers want to read.

Top ways to collect this data are:

- When they subscribe
- In the checkout process (e.g.: location)
- Surveys
- Asking customers to update their profiles
- Competitions & quizzes

### Tip

Initial subscription forms are best kept short. So, to collect more data like demographics, consider running a campaign that incentivises existing subscribers to update their profiles on your system.



# Message Engagement

Tracking customer behaviour is the secret weapon of data collection. It's like the gift that keeps on giving. For instance, using a platform like Everlytic, you can track when a contact has opened an email or clicked on a link in it. With this information, you can send targeted messages to people who have shown interest in a particular topic.



## Part 2 Segment Your Email List

# Shopper History

Tracking shopper history is amplified engagement tracking because it's done via an integration between your ecommerce and messaging platforms.

With Everlytic, for example, a shopper may abandon products in their cart on your ecommerce store. Via an integration, this can trigger an abandoned-cart email series from Everlytic, encouraging the shopper to complete their purchase.

The data you can collect here includes:

- Date of last order
- Last order value
- Number of total orders
- Total value of orders

**Tip** Use shopper history to send targeted rewards and custom specials to your most loyal shoppers. See more workflow examples from [pg 15](#).

## Part 2 Segment Your Email List

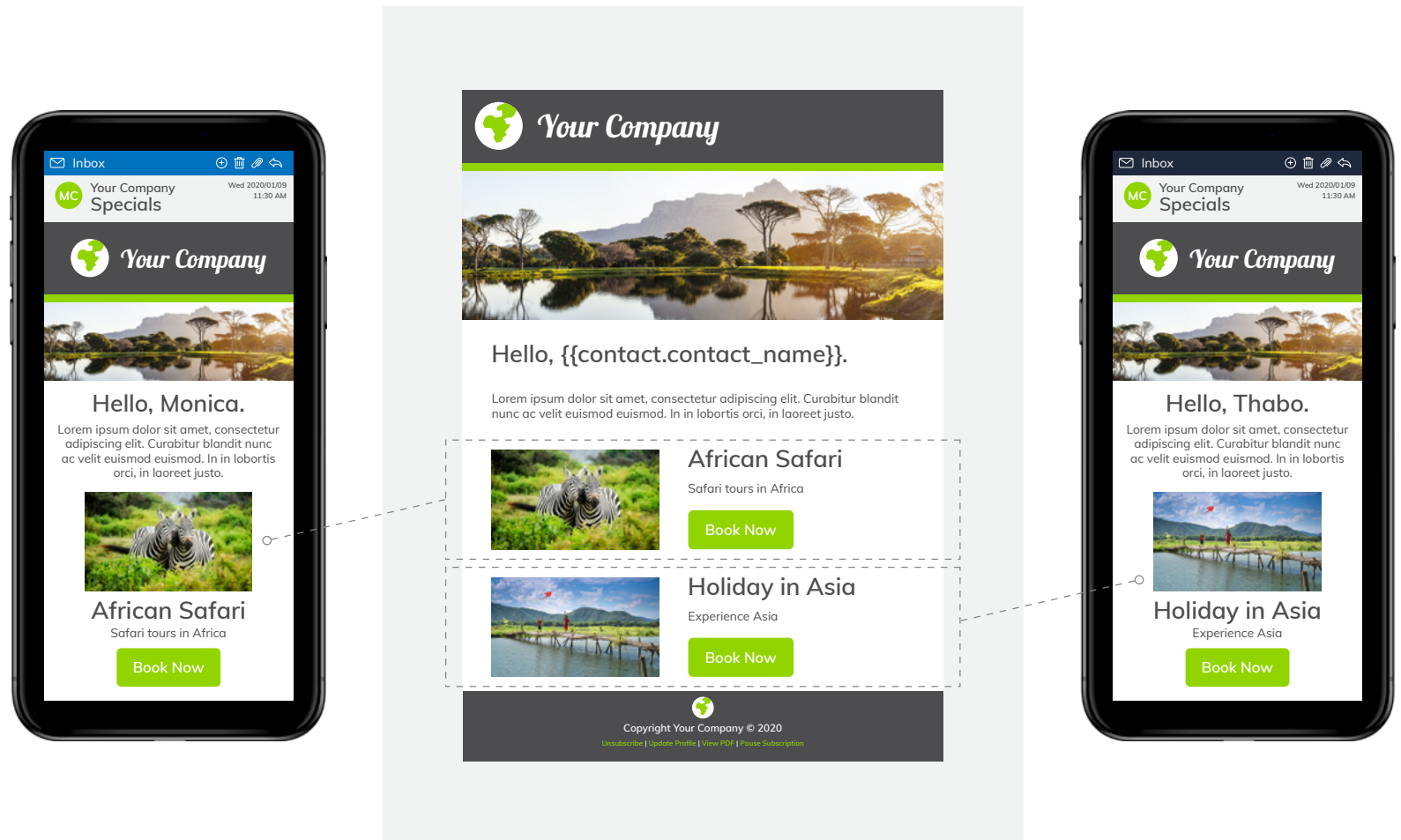
# How to Segment Your Lists in Everlytic

There are a few different ways you can segment your list in Everlytic, including:

### Using Dynamic Content

Dynamic content allows you to create one email with multiple different sections in it and then programme each section to go to a certain segment of your list.

This means only the audience that you've specified will see their relevant section when the email arrives in their inbox. Anything not relevant to them, they won't see; enabling you to reach a whole range of different audiences – personally – with one dynamic email.





## Part 2 Segment Your Email List

# How to Segment Your Lists in Everlytic (cont.)

### Triggering by Engagement

In Everlytic's automation workflows, you can trigger a workflow or a message in the workflow based on how a contact engaged with other messages in the workflow.

For example, if one of your customers views a landing page for an eye-care product, you can trigger an email with more eye-care content and benefits, related products, or services that you have available. Other options include triggering a voice broadcast when an email isn't opened, or an SMS when a voice broadcast isn't answered.

The kinds of engagement you can trigger on include:

Email	SMS	Voice Broadcasting	Landing Pages
Opened	Clicked	Answered	Visited
Clicked	Unsubscribed	Not answered	Clicked on a link
Unsubscribed			

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# How to Segment Your Lists in Everlytic (cont.)

## Update Contact Fields

Another functionality the Everlytic platform offers is for you to update specific data fields if a contact engages with your messaging in a certain way.

For instance, if you send an email showing two different clothing types – sports gear and evening wear – and your customer clicks on sports gear, you can get the system to automatically update, say, a 'Current interests' field to 'Sports'. This enables you to send more sports-related content to the people who've shown interest in sports gear before.

## Get Niche with Filters

Another way to segment is by using filters to customise which segments of your list to include or exclude in an email send.

Filter Names	Description
List Properties	Whether a contact is or isn't on a specific list in the system.
Geolocation	Where the contact is based geographically.
Custom Fields	Data fields that you've created yourself.
Contact Activity	When the contact was created or how the contact has engaged with your previous communications.
Basic Contact Fields	The standard data fields for most contacts, like name, mobile number, and email address.
Additional Fields	Other data fields, like birth date, address, company, and job title.

**Tip** Advanced Segmentation: Add and / or statements to your filters, or groups of filters, to really drill down to hyper-niche audiences.





A blurred background image showing several people's hands and arms as they use various mobile devices like smartphones and tablets. The focus is on the interaction with the devices, with the people's faces and bodies out of focus.

## Part 3

# Top eCommerce Workflows

Workflows in Everlytic are automated communication journeys. They can include multiple channels, like email, SMS, voice broadcasting, and push notifications, and are customisable to your needs.

In the final part of this guide, we'll cover some of the most common ecommerce workflows and automations you can use to keep your shoppers engaged.

Not sure how automated workflows work? [Check out this infographic.](#)

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# Onboard New Subscribers

How ever you add people to your list, thank them and / or welcome them as soon as they get there. As these emails are responsive to a subscriber's own actions, the engagement rate is much higher than on regular emails.

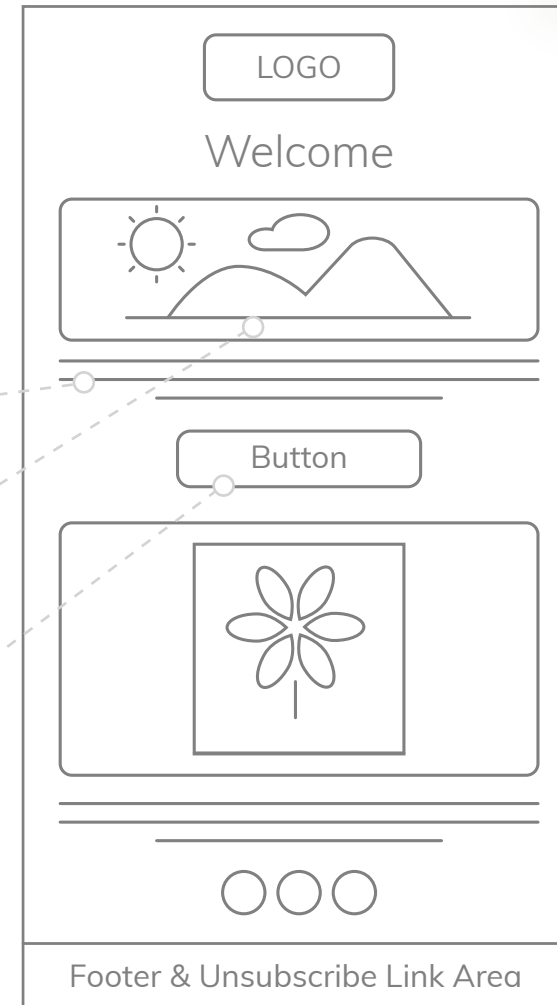
Plus, if this is a newsletter list they've opted in for (as opposed to, say, a thank-you email with a free download), it can boost subscriber retention by managing expectations on what they'll receive from you in the future.

## What's in a Welcome Email?

- 1 A Welcome Message**  
Share who you are as a company, what you stand for, how they made it onto your database, and explain what they can expect from you in the future.
- 2 Enticing Images**  
Strong, high-quality images, icons, and a clean, uncluttered design are like body language. They give people a sense of who you are and what you're saying without words.
- 3 One Call to Action**  
As you've just met this contact, it's better not to overburden them with options or demands. Emails with a single, powerful call to action may even boost click-through rates.

Get more tips on our blog post [How to Make the Most of Your Welcome Emails](#).

**Note:** A welcome email is a simple workflow, as it usually includes just one email that's triggered when a new contact submits their subscription form.





# Order Notification Series

Order notification emails confirm that a shopper's purchase has been successful. This gives customers peace of mind, knowing that the payment has been processed and you know about their order.

With Everlytic, you can set up an email series, like the below, for when shoppers make purchases.

### Mail 1: Thank-You Email (Sent immediately)

Confirms the purchase and thanks the person for shopping at your store. These emails usually have excellent open rates, particularly if sent immediately after purchase. They also enable you to let shoppers know what happens next, how long they can expect to wait until they receive their order, and what they need to do to receive it.

### Mail 2: Service Review Emails (Sent a few days after purchase)

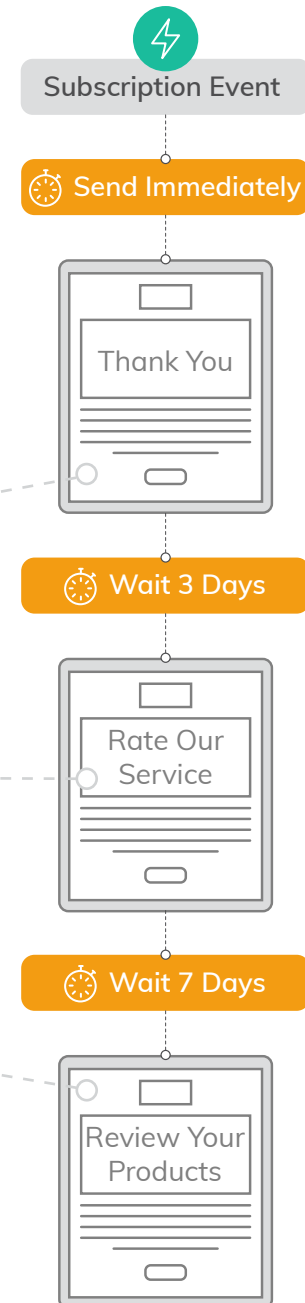
Once the order's been delivered, ask for a review of your service. This helps you to get on-the-ground feedback, so you can make improvements quickly.

### Mail 3: Product Review Email (Sent a week after purchase)

You can also follow up a few days later for a product review.

Read more in [Automation Tips for Your Black Friday 2020 Communications](#).

**Tip** Consider sending order notifications across multiple channels, like email and SMS, as this can improve trust, increasing your chances of the shopper purchasing with you again.



# Abandoned-Cart Series

Automated abandoned-cart emails catch customers who abandon their carts before completing their purchase, encouraging them to come back to fulfil their order. But one abandoned cart email often isn't enough – three-email workflows like this are significantly more effective at boosting sales.

### Mail 1: Shopping Cart Reminder

Reminds shoppers that they left items in their cart. At the bottom of the email, you can also include a view of other items on sale if shoppers still want to add more to their carts.

### Mail 2: Incentive to Return

Many online transactions are abandoned because of price. Consider throwing in a discount or free delivery. Some shoppers may catch on to this trend though, so this one's flexible. If you choose to skip the incentive, go straight to mail 3.

### Mail 3: FOMO Urgency to Buy

Piggyback off the incentive email, saying the incentive is about to expire. If you've chosen to exclude the incentive, say their cart is about to expire instead. This FOMO-style messaging may increase their desire to return.

eCommerce retailers can lose **as much as 81% of sales on abandoned carts**. That's 8 out of every 10 shoppers! But with automated abandoned-cart emails, and their typically high open and click-through rate, this abandonment rate drops substantially.





# Incentivise Stagnant Shoppers

As you can track shopper history, you can set up an automated re-engagement email to trigger, say, three months after a shopper's last purchase, incentivising them to return.

**Tip** Tip: Include social proof in these emails to increase your credibility. Get tips in our blog post, [Boost Your Email Marketing with Social Proof. Here's How.](#)

# Boost Retention with Surveys

Another great way to re-engage shoppers who haven't bought from you in a while is to understand why, with a survey. You can run this as a competition or offer an incentive to increase their chances of completing it.

**Tip** Read more about retaining customers after sale in our blog post, [Improve Customer Retention by Actively Communicating Beyond the Sale.](#)



# Integrate Your eCommerce Store with Everlytic

You can now sync your ecommerce store with Everlytic to engage personally and relevantly with online shoppers in real-time via email, SMS, or voice broadcasts. This integration enables you to:



Sync Customer Data Between Platforms



Pull Store Products into Emails



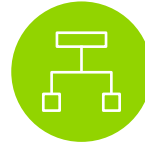
Customise Messages with Customer Data



Use Countdown Timers to Drive Urgency



Segment on eCommerce Activity



Trigger eCommerce Workflows



Send Messages to Loyal Clients



Get Holistic Insights Using Customer Data



# Conclusion

**eCommerce is booming. Is your store set up to handle the competition?**

Use the guidelines in this guide to automate your communications, so your business can improve efficiencies and scale seamlessly with the industry.



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