



Email Marketing Automation SOP - VV Digital Hub

1. Setup & Infrastructure

- Choose email platform (Mailchimp / ConvertKit / HubSpot)
- Authenticate domain (SPF, DKIM, DMARC)
- Create branded, mobile-first templates
- Set up lead magnets & opt-in forms
- Integrate with CRM & tracking (UTM, GA, attribution)

2. Core Email Sequences

a) Welcome Sequence (5–7 emails)

- Email 1: Welcome & set expectations
- Email 2: Brand story / mission
- Email 3: Share valuable resources/tools
- Email 4: Social proof (testimonials/case studies)
- Email 5: Engagement ask (survey, social follow)
- Email 6: Soft pitch / low-commitment offer
- Email 7: Transition into nurture list

b) Nurture Campaigns

- Weekly newsletter (insights, tips, trends)
- Educational content series
- Success stories / case studies
- Seasonal or local market insights
- Behind-the-scenes / brand stories

c) Conversion Sequences

- Abandoned cart recovery (3-touch)
- Lead magnet follow-up → paid offer
- Re-engagement for inactive subscribers
- Post-purchase onboarding (loyalty focus)
- Upsell & cross-sell campaigns
- Referral / advocacy sequences

3. Optimization & Iteration Loop

Step 1: Collect Data

- Track open rates, CTR, conversions, unsubscribes, spam complaints
- Use heatmaps to analyze link clicks
- Attribute revenue to each sequence

Step 2: Analyze & Benchmark

- Compare metrics to industry SMB benchmarks
- Identify underperforming sequences
- Segment audience by engagement

Step 3: Hypothesize & Plan

- Define one clear hypothesis (e.g., personalized subject lines → +15% open rate)
- Plan single-variable A/B tests

Step 4: Implement Changes

- Roll out changes to test segment
- Keep a control group

Step 5: Evaluate Results

- Review data after 2–4 weeks
- Document learnings in playbook

Step 6: Scale Winners

- Apply successful tactics across workflows
- Update templates & content libraries

Step 7: Repeat Loop

- Run iteration cycle every 30–45 days

4. Maintenance & Hygiene

- Clean inactive & bounced contacts monthly
- Refresh lead magnets quarterly
- Full audit of sequences every 6 months
- Monitor deliverability & compliance (GDPR, CAN-SPAM, India DPDP)

5. Documentation & Knowledge Base

- Maintain SOP playbook of best practices
- Store winning subject lines & CTAs
- Track benchmarks & sequence performance
- Record insights from iteration loops