

# Email Marketing Automation Basics Checklist

## A Beginner-Friendly Checklist to Set Up Your First Email Sequence Without the Stress

Email automation can sound a little intimidating at first, but it's really just a simple way to send the right emails at the right time—automatically. That means you can welcome new subscribers, share helpful tips, and even recommend products without having to send every email manually.

This checklist will help you get started in a simple, beginner-friendly way. No tech overwhelm. No complicated funnels. Just the basics you actually need. 🙌

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### ✓ 1. Pick One Clear Goal for Your Automation

Before you build anything, decide what you want this automation to do.

Ask yourself:

- ✓ Do I want to welcome new subscribers?
- ✓ Do I want to deliver a freebie?
- ✓ Do I want to build trust with helpful tips?
- ✓ Do I want to introduce an offer or product?

💡 **Beginner tip:** Keep it to **one goal per sequence** so everything feels clear and easy to follow.




**Example:** “This sequence will welcome new subscribers and help them get to know my brand.”



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### ✓ 2. Plan a Simple Welcome Sequence

A welcome sequence is one of the easiest automations to create, and it's perfect for beginners.


A simple 3–5 email flow could look like this:

-  **Email 1:** Welcome them and deliver the freebie
-  **Email 2:** Introduce yourself and share what to expect
-  **Email 3:** Give a helpful tip, tool, or quick win

-  **Email 4:** Softly introduce a product, service, or resource
-  **Email 5:** Encourage them to take the next step

 **Example:** If you offer a free checklist called “**10 Easy Ways to Start Email Marketing**,” your first email could say:

**“Hey [First Name], thanks for joining! Here’s your checklist, and I’m excited to help you get started.”**

 **Helpful reminder:** Write your emails first before setting up the automation inside your platform.


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### 3. Choose the Trigger That Starts the Automation

A **trigger** is what tells your email platform when to begin the sequence.

Common beginner-friendly triggers:

- ✓ Someone joins your email list
- ✓ Someone fills out a form
- ✓ Someone downloads a freebie
- ✓ Someone clicks a specific link

 **Best place to start:** Use the easiest trigger first:

**“When someone joins my list...”**



That keeps setup simple and avoids confusion.


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### 4. Use Tags or Segments to Stay Organized

Tags and segments help you keep track of what people are interested in, what they downloaded, or what actions they took.

Simple tag examples:

-  **New Subscriber**
-  **Downloaded Freebie**
-  **Clicked Product Link**
-  **Welcome Sequence**

 **Example:** If someone signs up to get your free lead magnet, you might tag them as:

## “Freebie Downloaded”

That makes it easier later if you want to send related emails just to that group.

👉 Don’t go overboard in the beginning. A few basic tags are more than enough.

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## ✓ 5. Map Out the Flow Before You Build It

Before you click around inside your email software, sketch out the basic flow of your automation.

Keep it simple:

- ➡ Subscriber joins list
- ⌚ Wait 1 day
- ✉ Send Email 1
- ⌚ Wait 2 days
- ✉ Send Email 2
- ⌚ Wait 2 days
- ✉ Send Email 3

If needed, you can later add small decision points like: - ✓ If they clicked a link, send a follow-up email - ✓ If they didn’t click, send a reminder

💡 **Beginner advice:** A straight, friendly sequence works great. You do **not** need a complicated flowchart to get results.

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## ✓ 6. Add Personalization Without Overdoing It

Personalization can make your emails feel warmer and more human.

Easy ways to personalize:

- 🙌 Use their first name in the greeting
- ✉ Mention the freebie they signed up for
- 💬 Write the way you would naturally speak

**Example: “Hi [First Name], here’s your free guide!”**

💡 Use personalization naturally. Too much can feel awkward or robotic.

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## ✓ 7. Test Everything Before You Go Live

This step can save you from embarrassing mistakes.

Run through this mini test checklist:

- ✓ Send a test email to yourself
- ✓ Check that all links work
- ✓ Make sure the freebie downloads correctly
- ✓ Review your email on desktop and mobile
- ✓ Read for typos and awkward formatting
- ✓ Test the full automation as if you were a subscriber

💡 **Example:** Sign up using your own email address and walk through the sequence exactly how a subscriber would experience it.

That way you can catch issues before anyone else sees them.

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## ✓ 8. Launch Your Automation

Once everything looks good, turn it on.

🎉 That's it—you officially have an email automation running.

After launching:

- 👁 Watch your first few signups carefully
- ✓ Make sure emails are sent in the right order
- ✓ Confirm delays are working properly
- ✓ Check that tags are being applied correctly

💡 If something feels off, don't panic. Small tweaks are normal.

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## ✓ 9. Keep an Eye on Your Results

After your sequence has been running for a bit, look at the numbers.

Pay attention to:

- 📄 **Open rates** – Are people opening your emails?
- 🖱 **Click-through rates** – Are they clicking your links?
- 📄 **Unsubscribes** – Are people dropping off too quickly?

💡 **Example:** If Email 2 gets a lot of opens but Email 3 gets ignored, you may need a better subject line or more helpful content in that third email.

Your stats can show you where to improve.

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## ✓ 10. Keep It Lean and Update as You Grow

When you're new, simple is powerful.

You do **not** need a giant automation system with endless branches, tags, and triggers. Start with one clean sequence that works.

A good rule of thumb:

- ✓ Review your automation every 3–6 months
- ✓ Update old links or outdated offers
- ✓ Improve emails that get low clicks or opens
- ✓ Add more advanced steps later if needed

💡 Think of your first automation like a starter home. It doesn't have to be fancy—it just needs to work well.

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## ✨ Final Encouragement

Email automation is not about being complicated. It's about making your email marketing easier, more consistent, and more helpful for your audience.

Start small. Keep it simple. Learn as you go.

That's how beginners turn into confident email marketers. 💙