

Planning Your Automated Email Welcome Series

A great welcome experience starts with clear strategy and compelling content.

Use these worksheets to jumpstart your planning process.

Start with the basics

1. Have a clear picture of what you want new subscribers to do.
2. Find content that you already have that will engage them.

What Actions Should Audiences Take?

The audience for this welcome series is:

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The most valuable thing they can do for my organization is:

What are the steps your audience typically goes through before they do that 'most valuable' thing?

What Content Will Engage Them?

The best content I can provide to this audience is:

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The top obstacles or questions my audience faces are:

Plan your arc

1. For a three-email welcome series you'll be **introducing** your organization, **highlighting** its value, and **inviting** readers to engage.
2. In the following worksheets, find the best **content** that supports the desired **actions** you identified earlier.

Plan Your Arc: Email 1

The first email in the series will **introduce subscribers to my organization** and promote the following content:

And ask the reader to take what action?

Plan Your Arc: Email 2

The second email in the series will **focus on a unique strength of my organization** and promote the following content:

And ask the reader to take what action?

Plan Your Arc: Email 3

The final email in the series will **highlight a way the reader can support you** and promote the following content:

And ask the reader to take what action?

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Now put your plan into action!

Get in touch for help fine-tuning
your strategy and launching your
welcome series.

email:

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