



**Company Name**

# **Forms & Email Workflows**

Please note:

This is an example strategy document from Graydian.

This is for demonstration purposes only.

It does not contain any specific client marketing strategies.

## Sources

*Sources of Customer Data*

### Automatic:

- Contact Form
- Quote Form
- Landing Page

### Manual:

- Entry After Phone Call
- Entry From Email Message

## Data Collected

*For Emails*

- Email Address (required)
- First/Last Name
- Location (State)
- General Interests

**Crossed out forms** = Forms that exist on the site, but will not be used in this workflow.

## Actions

- Entry added to: **Customer Database**
- Entry immediately emailed to: **person@comapny.com**
- Recap and thank you immediately emailed to: **Submitter's Email Address**
- Collected Data added to: **Email Marketing List**

## Automation Trigger

When a contact is added into the email list manager.



## Automation Begins

Pre-Sales Series



## 1 Day After Entry

Thank You • About Our Company • Exclusive Download



## 2 Day After Entry

Video Testimonial • Introduction Letter From President



## 1 Weeks After Entry

Photo Gallery • Did you have a chance to look at our site?



## 2 Weeks After Entry

Recap Offerings • Contact Us

#1

**Pre-Sales Series**

## 1 Day After Entry

**To:**

\*|FNAME|\* \*|LNAME|\*  
Recipient's email address

**From:**

Company Name  
info@company.com

**Subject:**

**Preview Text:**

*Preview text appears in the user's email client under the subject prior to opening the full message. Preview text does not appear in the full message.*



**Company Name**

**Email Content**

**Footer**

*Contact info, etc.*

#2

Pre-Sales Series

## 2 Days After Entry

**To:**

\*|FNAME|\* \*|LNAME|\*  
Recipient's email address

**From:**

Company Name  
info@company.com

**Subject:**

**Preview Text:**

*Preview text appears in the user's email client under the subject prior to opening the full message. Preview text does not appear in the full message.*



**Company Name**

**Email Content**

**Footer**

*Contact info, etc.*

#3

Pre-Sales Series

## 1 Week After Entry

**To:**

\*|FNAME|\* \*|LNAME|\*  
Recipient's email address

**From:**

Company Name  
info@company.com

**Subject:**

**Preview Text:**

*Preview text appears in the user's email client under the subject prior to opening the full message. Preview text does not appear in the full message.*



**Company Name**

**Email Content**

**Footer**

*Contact info, etc.*

#4

Pre-Sales Series

## 2 Weeks After Entry

**To:**

\*|FNAME|\* \*|LNAME|\*  
Recipient's email address

**From:**

Company Name  
info@company.com

**Subject:**

**Preview Text:**

*Preview text appears in the user's email client under the subject prior to opening the full message. Preview text does not appear in the full message.*



**Company Name**

**Email Content**

**Footer**

*Contact info, etc.*









