AUTOMATION PLANNING WORKSHEET

Use this worksheet to help you plan and organise your automation series.

1. **Who is the audience?** (Donors? Volunteers? Corporate sponsors?)
2. **What does the contact need to know at this stage in the relationship?** (Make a list of what they want to know, what they need to know and their needs, problems, and challenges.)
3. **Use Autoresponders to create an automated email that offers helpful content addressing each list item you created above.** (Keep these emails to the point and focused on one topic.)
4. **Decide on a frequency for your messages.** (In the beginning you'll want your messages to be a bit more frequent than your regularly scheduled email newsletter, because that's when their interest will be highest. When in doubt once a week is a good rule of thumb.)
5. **Include a call to action. What is the action you ultimately want the contact to take?** (Make a donation? Volunteer time? Don't forget to ask them to do something in your autoresponder series. Save the call to action until you've sent at least two messages with helpful content.)

A note about the maintenance of your autoresponder series

When creating your automation series, you'll want to be aware of any time-specific content you include. It's is an automation series you plan on continually using, it's best to stick with timeless content that will be the same today or a year from today. Be sure to review your messages and make any necessary updates.

1 Audience: _____

Automated email	Day	Content	Call to Action

3 4 2 5