

Your first email workflow

Plan one audience and one useful next step. Save a new copy and check your saved answers in a compatible PDF reader, or print and write by hand. Use a separate copy for buyer follow-up.

1. Verified offer

Product / contents and formats / price and currency / verified product link.

2. Reader and useful next step

Who is this for, what do they need, and what should this email help them do?

3. Permission and exclusions

How and when did they subscribe? Who must not receive this marketing?

4. Entry and stop rules

Name the exact signup, funnel, tag or purchase. State when someone exits.

5. Goal and review window

Choose a useful outcome. Define the metric, denominator and time window.

Messages and send review

Keep each message useful. Timing is a plan, not a guaranteed delivery time. Replace all placeholders and review the actual audience, links and capacity before sending.

6. Message one

Purpose / subject / one next action / wait or planned start.

7. Message two

Purpose / subject / one next action / wait or planned start.

8. Message three

Purpose / subject / one next action / wait or planned start.

9. Delivery and review owner

Sender verification / queue and capacity / timezone / reviewer and review date.

Before sending

- ☐ Permission is recorded; unsubscribed and suppressed contacts are excluded.
- ☐ Existing buyers are excluded from this sales pitch; stop rules are set.
- ☐ Product contents, price, claims and links match the actual offer.
- ☐ Own-address preview, phone readability and missing-name behavior checked.
- ☐ Sender details, required footer and unsubscribe controls are correct.
- ☐ Plan access, current queue, capacity and final audience are reviewed.