Drip Workflows: A Guide

Use Drip Workflows to Build a Marketing Machine that
Delights Your Audience, Thrills Your Customers, and Supercharges Your Business

By Anna Jacobsen
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Drip

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Introduction

Hi, my name is Anna and I work to help Drip users be insanely successful at marketing.

If you're reading this book and you're not yet using marketing automation, that's okay, but you might want to start with Drip's crash course on the topic (you can grab it here).

If you're using marketing automation, you already know how much of a difference it makes to use automation rules to dynamically change the messages you send based on who your subscribers are and what they've done.

Do you recall the moment when you realized how powerful automation was?

If you haven't used Workflows yet, you're about to have that moment again.

Drip users continue to find innovative ways to use Workflows. They're intuitive, powerful, and gorgeous. But for many, Workflows are unfamiliar territory— and that's where this guide comes in.

I wrote this book for a few reasons:

- To give those unfamiliar with Workflows a fundamental understanding of what they are and how they work
- To establish best practices for Drip Workflows
- To inspire you to start using Workflows *today*

While in their most basic form Workflows require very little to get started, this book will show you how to use their functions correctly, as well as some common-use cases (including exact blueprints you can use). It will also give you a better understanding of fundamental marketing automation concepts.

You'll learn the mechanics of Workflows, including principles that apply regardless of your platform. (If you are coming from another platform, you'll learn the differences between Workflows and other visual builders.)

You'll also get inspiration for Workflows you can build today to automate more of your marketing and customer interactions.

And, I've also included a worksheet you can use to plan your Workflows.

I wrote this book to help you get started with Workflows. But it's my hope that regardless of your experience with marketing automation, you'll find inspiration here that will make your marketing better.

Cheers,

Anna Jacobsen
Drip Customer Success

Chapter 1:
Workflows: What They Are and Why They're the Bee's Knees

If you already know why visual builders are the bee's knees, skip down to "What are Workflows?"

Workflows. Once you use them, you'll have a hard time remembering life before them. And if you do harken back to the pre-Workflows dark ages, you might shudder like I did and think, *"Don't make me go back there."*

Workflows fix the things you hate about email marketing software.

It's easy to get started with Workflows, but before we jump into the nuts and bolts of how to get set up, let's begin with a quick look at why visual builders are the business.

How Workflows Will Change Your Marketing Game (A Platform-Agnostic Case for Visual Builders)

If you've already automated your marketing with simple, if-this-then-that-style automation rules, you've seen your marketing start responding automatically to the actions your subscribers take. It's a beautiful thing.

You've watched your platform adapt to your tasks with each trigger and action, and done a fist pump as you watched your entire marketing system start to run itself.

Maybe you've taken it a step further and customized your platform to handle all of your analytics. From lead capture to conversion, a solid marketing automation platform gives you data on each step your subscribers take in their conversion journey.

But… there's a moment when every marketer who uses simple automation rules starts to *pull their hair out*. If you've had that moment, you don't need me to tell you why Workflows are awesome. You already feel the pain of building sophisticated funnels with simple unbundled automation rules.

I hear people describe the rat's nest of automation rules in their account (or show me their automation themselves) and most of the time, I need a few minutes to understand what's going on. *And I do this stuff every day.*

People who set up their rules once and come back a few months later often get very lost.

What I, and they, were missing was a clear, visual relationship between multiple rules, triggers, actions, and forms. When we used simple rules exclusively, we couldn't clearly see how segmentation changed the messages certain subscribers received.

Because the relationship was unclear, we didn't see the full potential for automation. And creating rules just to handle the end of an automation was clunky and, without a lot of care, could be misused.

When one rule led to another, or when a rule ran only for certain subscribers, or when someone needed to be pulled out of a sequence, it got more tricky. We needed a visualization for how everything interacted.

Workflows fix all of this. And they add a lot more power that you probably didn't know you even needed.

What are Workflows?

Workflows not only let you easily create gorgeous, visual marketing funnels, they let you build powerful automated marketing systems without you needing to create brittle hacks or write custom code. They are your automation.

Workflows free you up for higher-level thinking, allowing you to focus your efforts on the areas of your business where you can have the most impact. Instead of you scrambling to identify and reach out to users of your software about to churn, Workflows do this for you, letting you have the time to talk directly with them and solve a problem an automated system never could.

Workflows let you easily build sales pipelines in a way you can visualize, and dynamically edit all in one place—instead of managing disparate parts of your flow in various places in your account (rules, segments, campaigns, and one-off emails can accomplish many of the things you can do in a Workflow, but because they live in different parts of your Drip account, constructing your funnel that way is harder to manage.)

Workflows aren't a new concept. You can see some of the core principles from Drip Workflows in popular tools like Infusionsoft and Active Campaign, and if you have experience

in either of these platforms or with another visual builder, you should find some familiarity when you build your first Workflow in Drip (to learn more about the ways Drip's visual builders are different from Infusionsoft and Active Campaign, skip to The Differences Between Drip Workflows and Other Visual Builders).

With limited time and resources, how can you deepen your current efforts? Workflows will show you the way.

Why do you need Workflows?

If you send automated emails with specific conditions or segmentation, you will benefit from Workflows.

If you have the need to automate your communication with your customers based on what they have or have not done, Workflows will be indispensible for you.

If you need to connect with your users on a deeper level, but don't have time to initiate cold contact (or keep track of which users need to hear from you) Workflows are your new best friend.

Coupling automated actions with a visual representation of what is happening when gives you a lightbulb moment in crafting your marketing and user interactions.

You'll start seeing ways you should have been marketing all along, but hadn't. Workflows have a way of revealing marketing blind spots, and with the power they unleash, you'll start to fill the holes in your funnel that you didn't know you had, or didn't have the tools to fix.

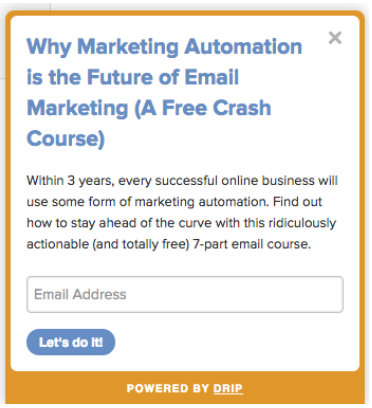
Workflows let you build your marketing automation platform into a tool that works with your efforts, rather than hindering them. Instead of being limited by your platform, you can easily adapt your funnel, engineer improvements, and see your platform support every iteration of your marketing with minimal time investment.

How do Workflows work?

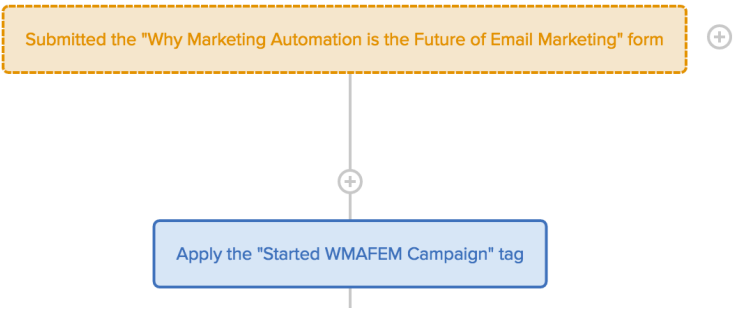
When a subscriber enters a Workflow, they travel from top to bottom through the steps you've created. At its simplest, a Workflow will have a way to start a subscriber in the flow (an entry trigger, whether that's at the beginning of the Workflow or is triggered by an external action, like a bulk operation or simple automation rule), an action, and an exit.

It could look something like this:

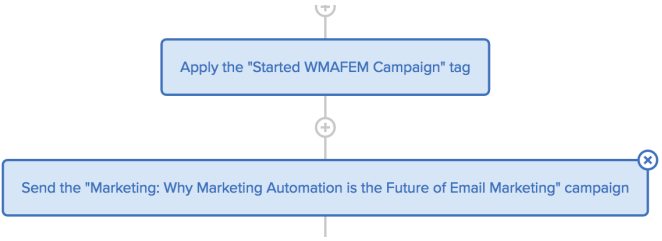
A subscriber submits a form and they enter the Workflow.



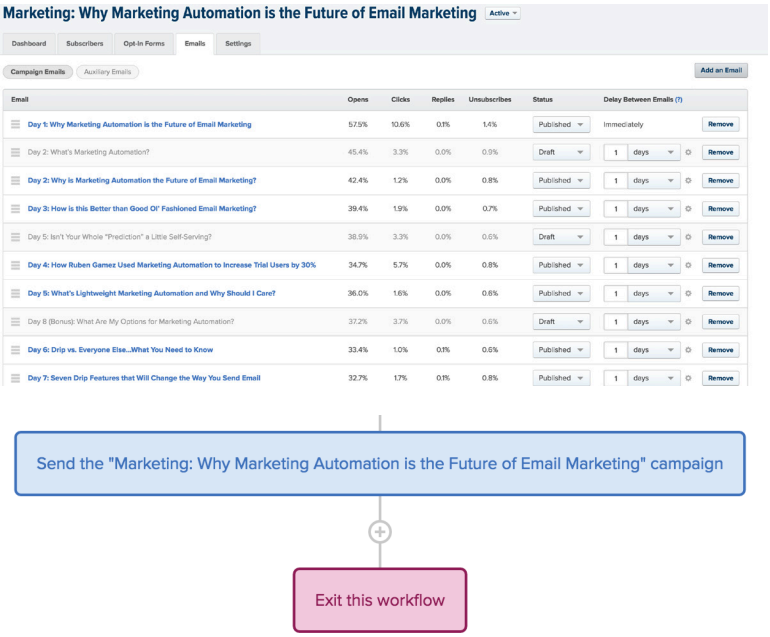
A tag is applied to the subscriber.



The subscriber is added to a campaign.



The subscriber exits the Workflow only after they receive every email in the campaign.



It's important to note that each step in a Workflow happens immediately after the previous one is completed, and actions in Workflows are sequential.

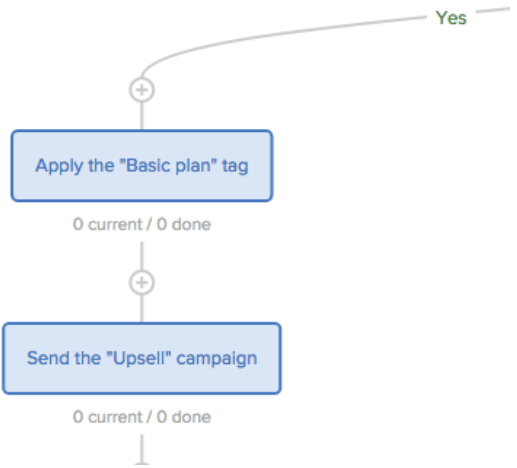
In the above example, the tag is applied right after the form is submitted, and then the campaign starts. As soon as the subscriber receives all campaign emails, they exit the Workflow.

However, as you're probably seeing by now, Workflows can have some complexity. Typically, you won't create a simple one- or two-step Workflow—you'll use decisions with segmentation logic to send certain subscribers one direction or another, and goals that, when achieved, pull subscribers to certain points in the Workflow.

I hear some people describe this as the "Plinko Effect" (remember the *Price is Right* game?), and that's a pretty good comparison—but instead of a random path, your subscribers will travel down your Workflow based on segmentation and logic.

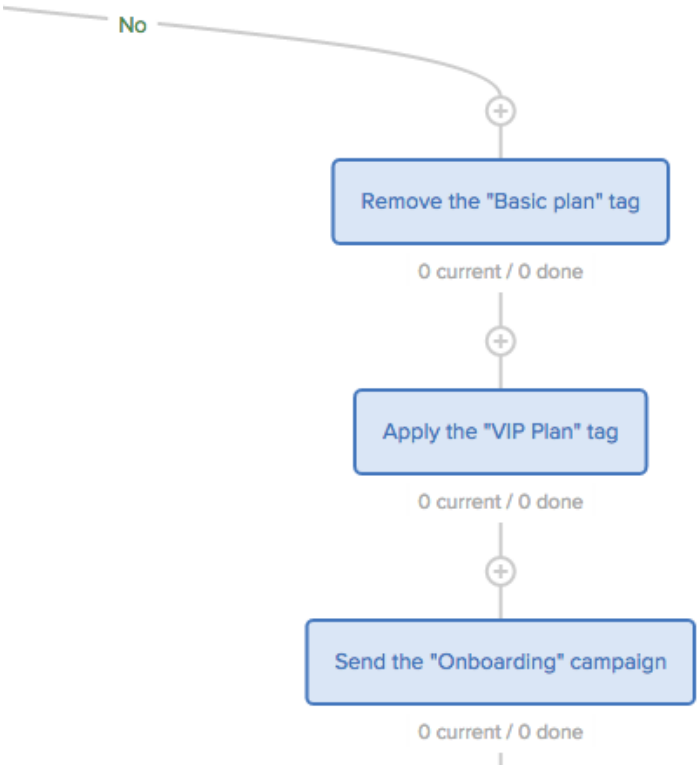
Here's a simple example of when someone buys a video series.

Decision: Does the subscriber have a plan_tier custom field set to "basic"? If yes:

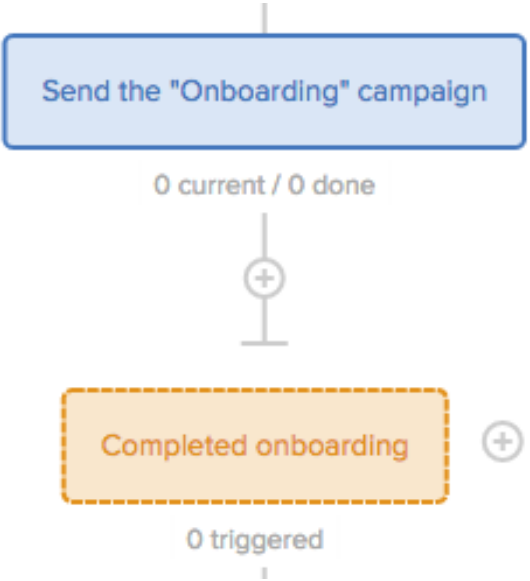


Action: Tag as a basic plan user and send upsell campaign.

If no:



Goal: When a subscriber completes onboarding, they will achieve this goal. If they complete onboarding, then they'll immediately stop receiving the campaign with onboarding calls to action.



Remember: When a subscriber achieves a goal, they will always be pulled from any campaign, delay, or nested Workflow above the goal they achieved.

You can add as many actions to a Workflow as you need, including actions triggered by external applications. This is really easy if you use Drip's integrations.

Workflows have a few main components:

- Actions
- Decisions
- Forks
- Goals
- Delays
- Exits

We'll examine each one-by-one shortly.

What about simple automation rules? Should I still use them?

Some marketing automation companies focus only on visual Workflows, with no ability to run automation outside of a visual builder.

Drip is different—it has both Workflows *and* simple automation rules.

By now, you have an appreciation for how Workflows can add power and clarity to your automation, eliminating the tangle you'll sometimes find with a large number of simple automation rules.

What you might not realize is that simple rules still fill a powerful role that even Workflows can't cleanly achieve: they allow you to "unbundle" the automation that might otherwise be stuck at a certain point in a specific Workflow.

Any kind of automation consists of a trigger and an action: when *this* happens, then do *that*. We call Drip's automation rules "simple" because the rules have robust triggers and actions, but they are independent of each other—not bundled together or collected in a visual diagram like Workflows are.

What you see in simple rules is very similar to the paradigm used by Zapier or IFTTT.

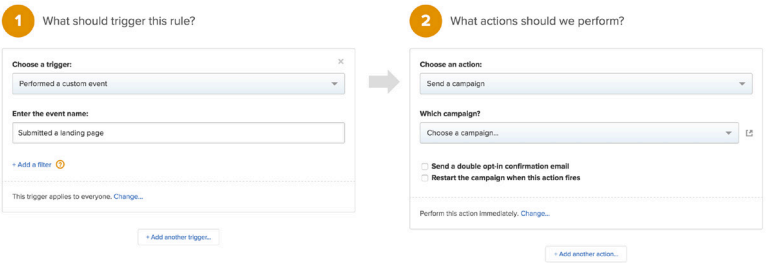
Simple automation rules are quite powerful, and you can use them to run almost any automated marketing function.

If you ever need something to always run in your account when a subscriber takes a certain action, a simple rule may be a good choice. For example, if a subscriber should always be tagged after visiting a certain page, a simple automation rule would allow you to ensure this universally happens to all your subscribers.

Here are more common uses:

- Trigger link actions
- Starting subscribers on a nested or triggerless Workflow
- Automating on any action that occurs account-wide; for example, whenever someone opens any email

Using simple rules to perform unbundled automation means you don't have to create a Workflow to achieve a simple one- or two-step automation.



Simple automation rules still play a vital role in your Drip account. They allow you to run an automation rule that will apply to your entire Drip account, not just to subscribers in a specific Workflow. If you need to do something like "visited X page, tag with Y" in every case, then you should use a simple automation rule.

Simple automation rules will keep you from building a Workflow for every minute automation you need in your Drip account.

When should you use Workflows?

Here are six specific use cases that will immediately benefit from Workflows:

- The SaaS free trial
- The eBook download
- Brennan Dunn's at-your-own-pace email course
- Chris Davis's Single-Double Opt-In Workflow
- The product demo
- The marketing webinar

People do marketing for each of these cases every day without ever touching a Workflow.

But let's look at each one of these examples and how Workflows can change the game. I include links to specific blueprint instructions later in this eBook on how to set this up in Drip, so if you want to start using any of these Workflows right now, you can.

Even if you don't use Drip, you can use these Workflows as concepts for other visual builders (*Note: not every feature you see in these Drip blueprints may be available in your builder, but the general concepts will still apply overall).*

SaaS free trial example

Using automated emails is fundamental to help trial users of your SaaS get fully onboarded.

Simple autoresponder sequences based on time delays are better than not sending emails at all. But they can be poorly timed, or can get ignored by your new users. Drip's simple rules can automate based on API calls, which is much more powerful than a timed sequence.

But as we've already covered, simple rules leave much to be desired in seeing a complete customer journey. A visual

flowchart is useful in many scenarios, but the trial and onboarding flow is probably the one where you'll see the most benefit.

And Workflows give you the extra power of goals, which make it easy to remind your trial users to complete each phase of onboarding (and not just once—they continue to nudge them until they do).

Ready to start? Use this blueprint.

Ebook download example

You can set up an automated eBook download sequence without using a Workflow. Setting up simple "if this, then that" automation rules could send purchasers to a follow-up engagement campaign and record a conversion.

If you want to send different upsell offers to segments of your subscribers, but not others, though, or if you have any kinds of emails that you have to start or stop sending based on what your customers buy afterwards, this becomes difficult with simple rules, and some things just aren't possible.

I've included a Workflow blueprint that gives you a simple eBook download flow, with customer segmentation and conversion tracking. The blueprint also shows how to include an upsell which you can use to promote a higher-value related item.

Get the blueprint here.

Brennan Dunn's at-your-own-pace email course

Email courses and Drip campaigns go together like sushi and ginger. Sending your course content in a time-delayed sequence is easy, and your subscribers don't get overwhelmed with too much content at once.

Some of your subscribers will be eager to learn all you have to say the very minute they subscribe to your course. If you

hit them at the right time, giving them the content they need exactly when they need it, you're priming them for success, rather than making them wait for the next email in your Drip campaign.

Brennan Dunn realized this and developed a Workflow that includes a default send frequency, the same as a standard Drip campaign, but also senses when a subscriber is engaging with his course right away—and is able to deliver all the course content in one sitting if the subscriber finished each installment of the course one right after the other.

This Workflow uses Gravity Forms to judge if a subscriber is engaged or not, but can be modified to work with your specific course.

Ready to try it? See the Workflow here.

Chris Davis's Single-Double Opt-in Workflow

You probably already know how using double opt-in keeps your list quality super high. Double opt-in requires your subscribers to confirm their subscription by clicking a link in a confirmation email after they sign up for your emails. If they don't click the link in the confirmation email, they won't receive any further emails from you.

This has a number of benefits. Anyone who makes it to your list has already proven they open and click your emails, so you'll see higher engagement on your entire list, which gives your sender reputation a real boost. You're also protecting your list from spammers, bots, and people who might maliciously subscribe an address they have no control over.

The drawbacks are obvious, though. Requiring your subscribers to click on another email, even after they just requested a lead magnet or a newsletter from you, adds friction to the process. It keeps your subscribers from getting the content they want from you right away.

Chris Davis of Automation Bridge developed an elegant solution that allows subscribers to hear from you right away, while keeping your list quality high.

Ready to try it? Get the Workflow here.

Product demo example

Some products sell themselves without much explanation. If you're selling an eBook or a tool that doesn't require much setup, you won't have a need to run product demos.

But if your product has a lot of complexity, or if your sales cycle has multiple touch points with a few decision makers, product demos can really boost your trial count.

When you start giving demos, you might be able to give them to anyone who wants one. But as you scale, you'll find your calendar will fill up with demos quickly. You need a way to:

- Pre-qualify those who request a demo
- Make sure everyone who wants a demo gets a walkthrough of your product, even if they didn't meet your pre-qualification requirements
- Give people access to available times on your calendar
- Follow up with people who request demos

All of this is a lot of work. If you manually did this for each request, that would be your whole week. So we developed a Workflow to automatically do all of these things, and it's saved us countless hours.

See how to build this Workflow here.

Webinar example

People who do webinars know the pain of either setting up their presentation platform to issue reminder emails or hacking an automated sequence in their ESP to send emails at just the right time for the webinar.

Post-webinar emails aren't a cakewalk, either, and if you do a webinar on a recurring basis, communicating with people who registered and trying to make sure they show up to the webinar can really suck up a lot of your time.

Using a Workflow, you can design a webinar journey for your subscribers that lets people opt in to your webinar, sends reminder emails on the correct day, and, if you use a system (like GoToWebinar) that reports attendance data to Zapier, automate different follow-up emails for attendees and no-shows.

Your webinar Workflow does all the heavy lifting for you so you can automatically see your attendance rates go up.

Here's how to do it.

Chapter 2
Building a Workflow

Building a Workflow is as simple as defining what should trigger the Workflow and adding at least one action.

Creating a new Workflow is easy. To do this in your Drip account, click on "Automation" in the top navigation bar. Then click "Create a New Workflow." Decide on what will trigger the Workflow, or if your Workflow should be triggerless.

Then, begin adding steps in the Workflow.

You may include a Goal, or multiple Goals, in your Workflow. When a subscriber achieves a Goal, they will be removed from any campaigns, delays, tagging sequences or Workflows that occur before the Goal.

To help you get started, let's define the building blocks of a Workflow. We'll look at each component of a Workflow, what

it does, and an example of use in a real flow. I'll also show you when to use each kind of step and examples of misuse.

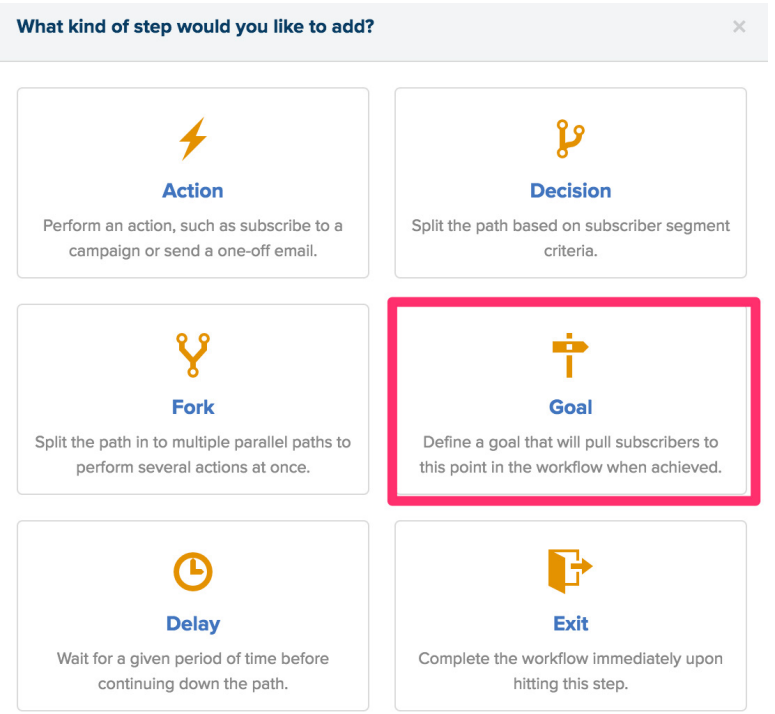
Orientation

Workflows are built vertically, fitting the format of your screen without the need for horizontal navigation. Your subscribers travel through a Workflow, starting from the top and moving their way to the bottom of the Workflow. Each step you add to a Workflow will run sequentially for a subscriber. For example, if you add a campaign to a Workflow, the next step after the campaign will not run until the subscriber completes the campaign. Workflows are ideal for building your marketing, onboarding, and lifecycle funnels.

Goals

If you've used Infusionsoft, you'll be familiar with this concept.

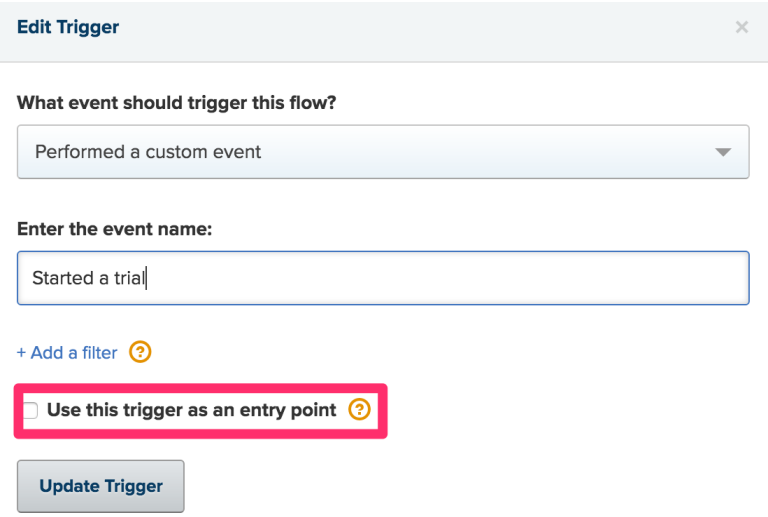
Infusionsoft uses Goals to move a subscriber much like Drip does. When a Goal is achieved, the subscriber moves from one point in the flow to another, pulling them out of the step they were in. Infusionsoft also uses Goals as entry points into the flow.



A Goal is a step in a Workflow that, when completed, pulls subscribers out of all prior steps in the Workflow.

Goals pull people out of all campaigns, Workflows, and delays above them in the current Workflow.

If a subscriber has not completed a Goal, they cannot proceed through the rest of your Workflow. An uncompleted Goal will prevent subscribers from moving to the next step of the Workflow.



Goals can be entry points into a Workflow. If you check "Use this trigger as an entry point," subscribers who are not already on the Workflow will begin the Workflow at that Goal if they achieve it.

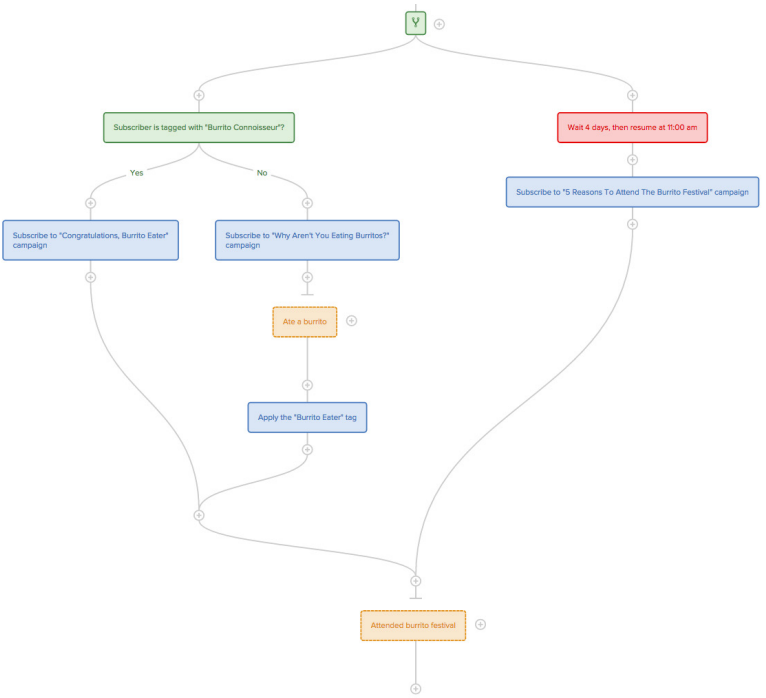
Goals always remove someone from everything above them in the Workflow—including delays, nested Workflows, and campaigns.

If a subscriber in a Workflow triggers a Goal below the campaign they're in, the Goal will pull them out of that campaign.

Subscribers outside the Workflow will enter it at this point when they complete the Goal's action.

Goals in parallel paths

Goals will only remove subscribers from anything above the Goal, not parallel to it. Here's an example:



The Fork at the top of this Workflow will perform multiple actions at once to a subscriber:

- They'll be subscribed to a campaign after a 4-day delay.
- On the other side of the Fork, there's a Decision that filters based on if a subscriber has a tag or not.
- In the "No" side of the Decision, there is a Goal.
- There's also a Goal below the Fork and the Decision.

If a subscriber is on the "Yes" side of the Decision (tagged with "Burrito Connoisseur"), but performs the "Ate a burrito" Goal, they'll get the "Burrito Eater" tag—even though they were in the "Yes" side of the Decision.

Subscribers tagged as “Burrito Connoisseur” won’t be removed from the “5 Reasons To Attend The Burrito Festival” campaign, because it is in a parallel Fork. But if they complete the “Attended burrito festival” Goal at the bottom, they’ll be removed from the “Congratulations, Burrito Eater” campaign and be removed from the “5 Reasons To Attend The Burrito Festival” campaign.

But if they complete the “Attended burrito festival” Goal at the bottom, they’ll be removed from the “Congratulations, Burrito Eater” campaign and be removed from the “5 Reasons To Attend The Burrito Festival” campaign.

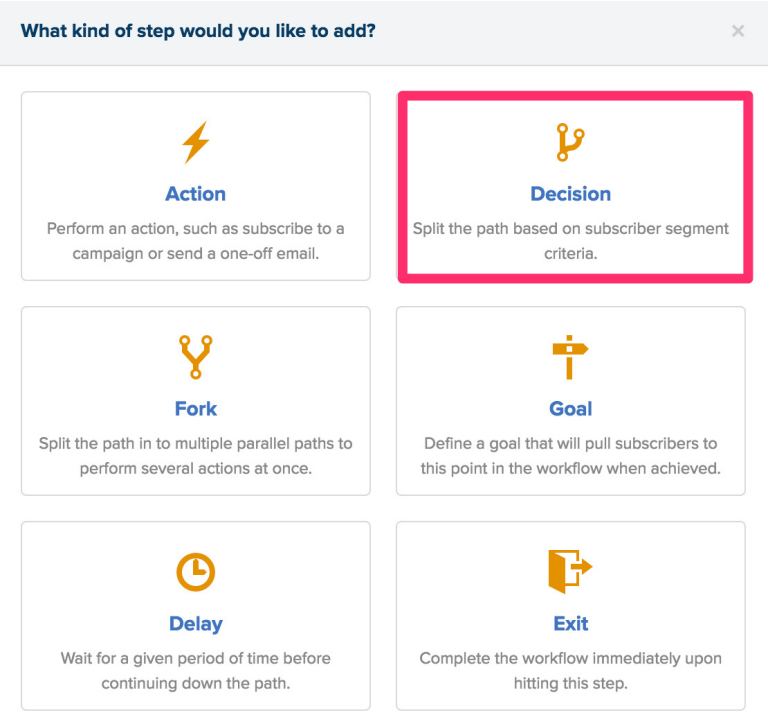
Actions

Actions are steps that let you message, segment, and analyze subscribers in Workflows. You can run Actions that will change the messages a subscriber gets from you, help you track analytics, and create groups of different subscribers. You can:

1. Apply a tag
2. Subscribe to a campaign
3. Move from one campaign to another
4. Remove from a campaign
5. Restart a campaign
6. Remove a tag
7. Send a one-off email
8. Set a custom field
9. Record an event
10. Record a conversion
11. Delete the subscriber
12. Send the subscriber to another application
13. Flag the subscriber as a prospect
14. Unsubscribe the subscriber
15. Send a notification email

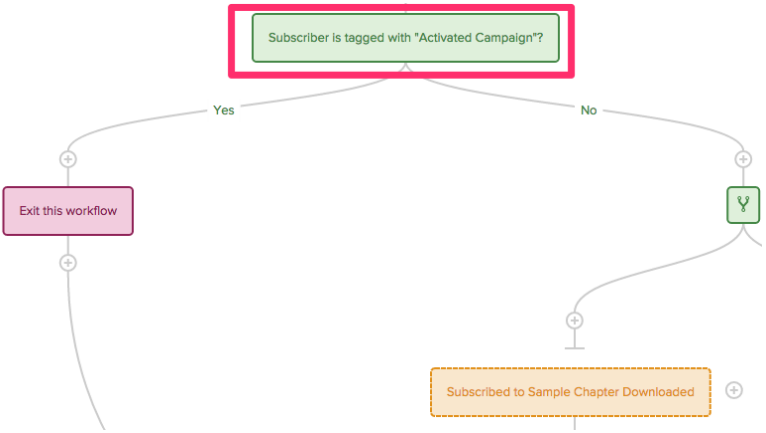
When you add an Action to a Workflow, we call it a step. All of these Actions can be initiated by a Workflow entry trigger or Goal trigger, or triggered by the completion of the step right above it.

Decisions



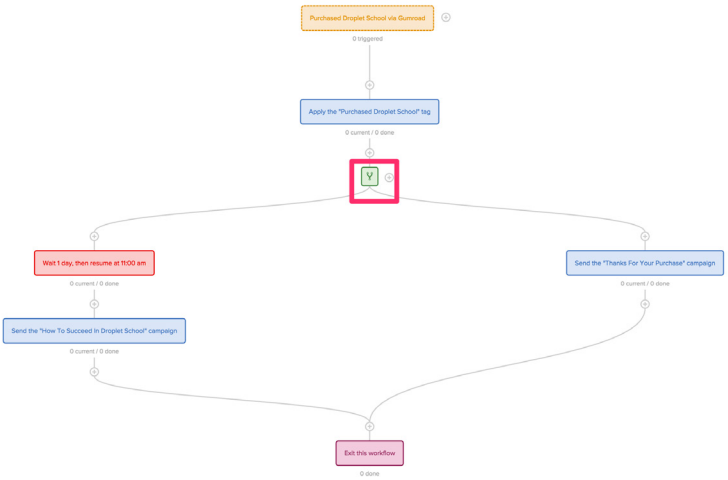
Decisions allow you to intelligently determine which of your subscribers you want to apply actions to.

Using a Decision in a Workflow will let you apply tags, subscribe people to campaigns, record conversions, and run any Action you need to only a certain segment of subscribers on your Workflow, while applying other steps to the rest—or applying no steps at all.



If you use a Decision to apply Actions to one segment of the subscribers on a Workflow, and need to remove the other segment of subscribers, you should use an Exit.

Forks



Forks allow you to run multiple paths concurrently in a Workflow.

When you use a Fork, you are running two or more streams of Actions at the same time, rather than waiting for a subscriber

to complete a step before moving on to the next Action in your Workflow.

Unlike a Decision, Forks require no logic to run; they apply to every subscriber in their path.

Use Forks when you need to have multiple things happen at the same time in your Workflow.

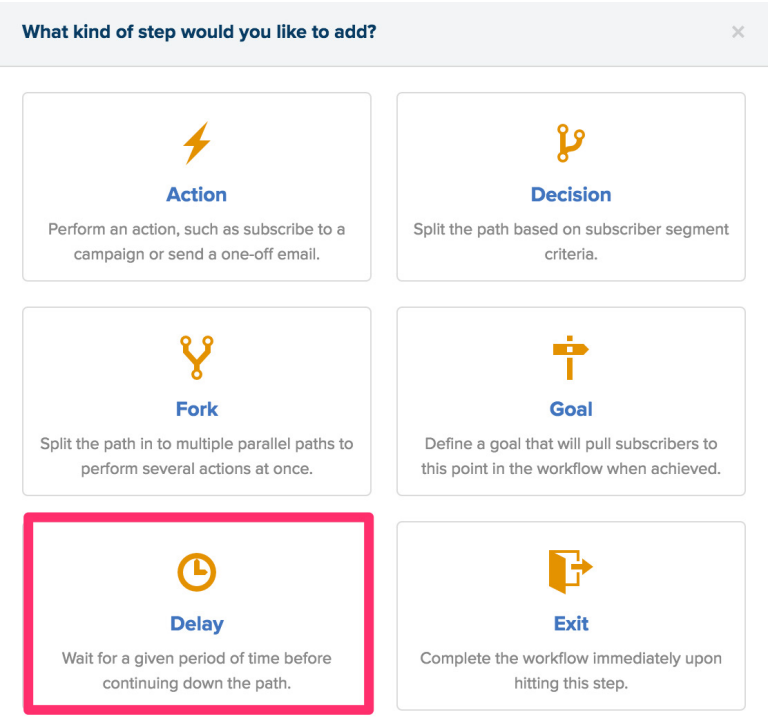
Inline Box: Should I use a Fork or a Decision? What's the difference?

A Fork allows a subscriber to travel down two (or more) paths at the same time.

A Decision asks the question, "Does this criteria apply to subscribers in this Workflow?" and sends a subscriber down only one of the paths. Decisions allow you to apply yes/no logic to subscribers, creating segments based on what a subscriber has or has not done.

Use a Fork if you need two things to happen at the same time in your Workflow, but use a Decision if you need to use segmentation logic to determine which subscribers will be affected by the steps that follow the Decision.

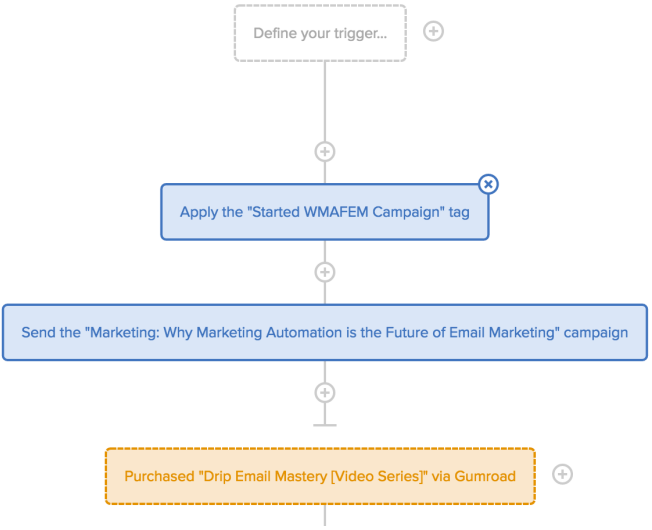
Delays



Delays allow you to wait minutes, hours, or days before performing a step in a Workflow, pausing all Actions in a path for a certain amount of time.

You can specify the duration of your delay, as well as which day of the week and time the path in your Workflow should resume.

Triggers



In Workflows, Triggers serve two purposes:

- Entry Triggers determine which subscribers should start a new Workflow, and when this should happen
- Goal Triggers govern when and how subscribers achieve Goals in a Workflow.

Each time you create a new Workflow, you'll first see a prompt to define the Workflow's Trigger. This is the *Entry Trigger*.

In advanced situations, you can start a Workflow without a Trigger. To get subscribers into a triggerless Workflow, you'll need to trigger using another automation rule, a nested Workflow, or a bulk operation.

Is a Goal the same thing as a Trigger?

Technically, Goals are the same construct as an entry point Trigger. One of the biggest differences is where they are used. Think of Triggers as occurring at the start of a

Workflow, and Goals occurring at any point after that.

Goals are different from Triggers in one major way: They will remove subscribers from any campaign, Exit, Delay, or Workflow happening above the Goal.

Here's a complete list of Triggers you can use in your Workflows:

Subscribed to a campaign
Trigger your Workflow as soon as someone confirms their subscription to a campaign.

Completed a campaign
Trigger your Workflow as soon as someone receives the last email of a campaign.

Unsubscribed from a campaign
Trigger your Workflow as soon as a subscriber unsubscribes from a campaign.

Visited a page
Trigger a Workflow when a subscriber visits the desired page.

Clicked a trigger link
Start the Workflow as soon as a subscriber clicks the desired link.

Updated a custom field
Start your Workflow as soon as a particular custom field is updated for a subscriber.

Performed a custom event
Start the Workflow when a subscriber performs the custom event you specify.

Applied a tag
Start the Workflow when the subscriber is tagged with the desired tag.

Removed a tag
Start the Workflow when a specific tag is removed from a subscriber.

Made a purchase
Start the Workflow when the subscriber makes a purchase from an integrated payment provider.

Performed an action in another application
Start the Workflow when the subscriber performs an action sent to Drip from an integrated application.

Submitted a form
Start the Workflow when the subscriber submits a form you specify.

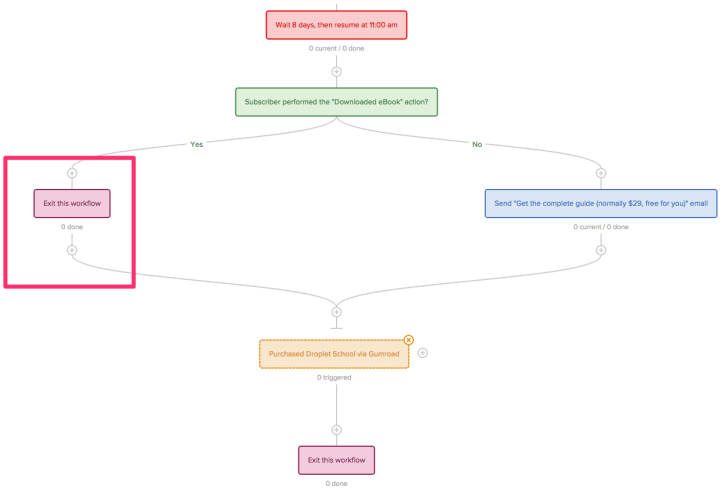
Submitted a landing page
This event is fired when the subscriber submits a page from a landing page provider.

Opened an email
Start the Workflow when a subscriber opens an email you specify.

Replied to an email
Start the Workflow when a subscriber replies to an email you specify.

Became a lead
Start the Workflow when the subscriber's lead score passes the lead threshold.

Exits



Workflows allow you to perform a vast array of steps for your subscribers. Occasionally, you'll need to remove subscribers from Workflows.

Exits allow you to do this easily.

If you want subscribers to exit a Workflow when certain conditions are met, you should use an Exit. Exits lets you remove subscribers from Workflows, giving you the power to build simple, clean, and readable diagrams.

With Exits, you can immediately disqualify someone from receiving the rest of your Workflow when the proper conditions are met, rather than having them live in a path without any steps.

To use an Exit for everyone on your Workflow, simply include it in the trunk/main path of your Workflow.

To use an Exit when only certain conditions are met, add it after a Decision (as shown above).

Is it okay to have multiple ‘Exit this Workflow’ steps?

Yes. You can construct your Workflow with several Exits, especially if you have multiple Goals in your Workflow. Multiple Exits can be used to remove subscribers in different paths who do not achieve Goals.

To do this, add your Exit before your Goal in the Workflow. If a subscriber achieves a Goal, they will be pulled to that Goal and will avoid hitting the Exit.

Chapter 3
The Differences Between Drip Workflows and Other Visual Builders

If you've used other builders, you'll see a lot of common themes in Workflows. There are some major differences, too, and here we'll take a look at the comparison between Drip's Workflows and Infusionsoft's and Active Campaign's builders.

Comparing Workflows to Infusionsoft's Campaigns

Design, layout, and the concept of Exits are the biggest difference between Drip's Workflows and Infusionsoft's campaigns. Instead of building a flow horizontally, with drag-and-drop modules that can be placed anywhere on your campaign canvas, you'll build a Workflow vertically in Drip. When you select a step to add to your Workflow, it's automatically placed in a sequential position.

Also, Infusionsoft doesn't have an equivalent for Drip's Exits. If you're removing subscribers from an Infusionsoft campaign using Decision-based Goals, you can recreate that function in Drip with an Exit.

However, you'll see familiar concepts between Infusionsoft and Drip, like Goals.

Infusionsoft Terminology	Drip Terminology
Clicks a link	Clicked a trigger link
Reaches a score	Became a lead
Purchases a product	Made a purchase
Submits a landing page form	Submitted a form/Submitted a landing page
Submits a web form	Submitted a form
API call is made	Performed a custom event
Applies a tag	Applied a tag
Completed by contacts in this campaign vs any contact	Use this trigger as an entry point

You'll find Infusionsoft's "Performance Overview" pane and Drip's Toggle Counts features to be similar, as well.

Comparing Workflows to Active Campaign's Automations

Drip and Active Campaign share a similar approach to layout: Both builders are vertically oriented, and when you place a step on the canvas, you see what's happening in that step at a glance. Steps in your Workflow follow a structure (similar to the Plinko board concept) of one thing happening after another, rather than being placed arbitrarily on a canvas like Infusionsoft.

Here's a breakdown of a few analogous concepts between the two builders:

Active Campaign Terminology	Drip Terminology
End this Workflow	Exit this Workflow
Go to another action	Restart a campaign/Use this Goal as an entry point/move from one campaign to another
Wait	Delay
Wait until certain conditions are met	The "pause" function of a Goal
Start an automation	Start a Workflow
End this automation	Exit
Adjust score	Record an event for lead scoring
Update contact	Set a custom field
Lists	Saved segments
Reply tracking using lists	Goal with "Replied to an email" trigger
If/else	Decision

Neither Infusionsoft nor Active Campaign have a feature like Forks, which allows you to perform multiple steps at the same time in one Workflow (see more about Forks here.) If you run multiple interdependent Workflows in Infusionsoft or Active Campaign, you can set them up as a Fork in Drip, so you can see all the actions happening for your subscribers in one view.

Chapter 4

Moving to Workflows: Steps to Follow to Make Your Transition from Simple Automation Rules to Workflows Painless

If you have a number of simple automation rules that you've created to work together, you can convert them to a Workflow and:

- Simplify and clean up your account
- Visualize how your rules work together in one flow
- Add extra segmentation and actions

The transition requires some planning—let's dive into the process.

Use this worksheet to inventory each of your rules and identify which Workflow you should recreate them in. (Make a copy of the worksheet in your Google Drive for your own use)

Worksheet to plan each of your Workflows

Inventory your rules.

Start by mapping out which rules relate to each other, and in which order they should go. If you have a lot of automation rules, it may be helpful to rename them by which are grouped together. For example, if you have a set of rules for when someone signs up for your webinar, you could add "Webinar:" to the beginning of each related rule.

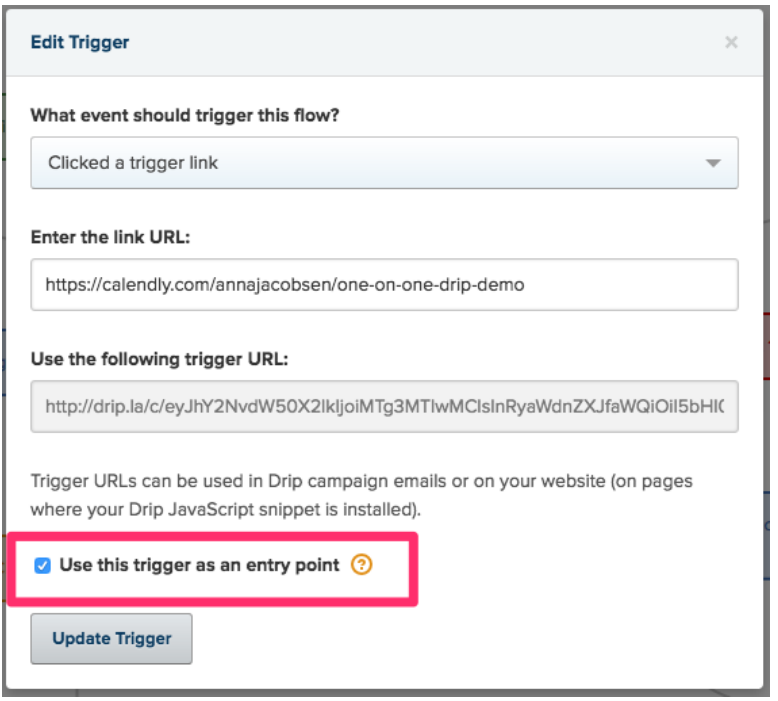
Don't forget rules that might live in forms. You can often eliminate those form rules by including them in your Workflow. Including form rules in your Workflow gives you the extra benefit of seeing how all your rules work together in one place.

Use Goals as entry point, or restrict your old rules using segmentation.

When you recreate your simple automation rules in a Workflow, they may still be handling subscribers outside of your Workflow.

Any subscriber who has already fired the entry trigger to your new Workflow will be excluded from the sequence of rules handled by your Workflow. For this reason, you need to either keep your simple rules running for this segment of your subscribers, or mark all Goals in your Workflow as entry points.

Marking Goals as Entry Points



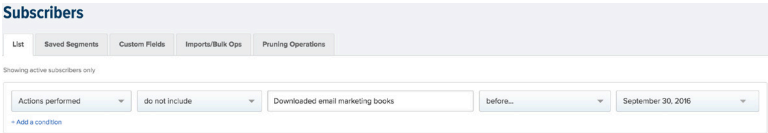
Marking Goals as entry points will allow subscribers outside the Workflow to enter the flow when they trigger that Goal.

Restrict Simple Rules to Pre-Workflow Subscribers

You could instead restrict your simple rules to a certain segment of subscribers—people who triggered the rule before you put the Workflow in place.

To do this, create a saved segment with the proper criteria, and restrict the automation rule to that segment.

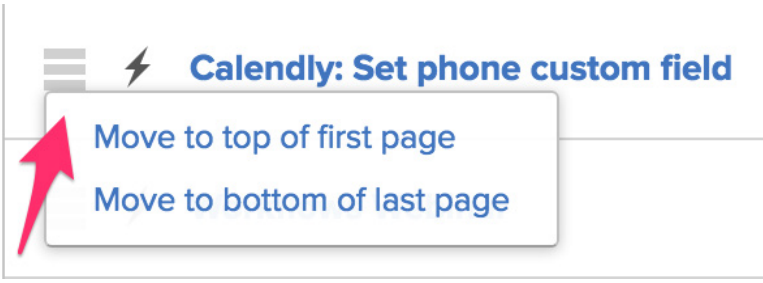
If you are already restricting the rule using segmentation, simply modify the existing segment using date-specific criteria.



Pause or archive rules that no longer run on any segments.

When you eliminate the need for an automation rule by recreating it in a Workflow, you should pause it or archive it, as long as it isn't currently handling subscribers (see above).

Pausing allows you to see it in your automation rules list. If you decide to archive, you will no longer be able to access the rule.



You can send all your paused automation rules to the last page of your rules list by clicking on this icon, making it easy to keep your rules list organized.

Test your new Workflow.

Once you build your Workflow, turn it on and use test subscribers to ensure it works as you intend. Your test subscriber could be your own email address, or a test segment with addresses of anyone testing your setup.

Leaving your Workflow triggerless until you are certain it's ready to go live will ensure no real subscriber can enter the Workflow during testing. To add your test subscribers to a triggerless Workflow, use a bulk operation.

If your Workflow includes multiple decisions and goals, you'll want to use testing addresses to meet each criteria to confirm the Workflow fires as you intend.

Use this worksheet to inventory each of your rules and identify which Workflow you should recreate them in. (Make a copy of the worksheet in your Google Drive for your own use)

Chapter 5
Workflow Best Practices

When to split a Workflow into multiple Workflows

Now you know how to create a Workflow. At this point, you might be tempted to stuff each one of your existing automation rules into one Workflow. In most cases, this isn't ideal: it can lead to unwieldy, complex flows that aren't easy to understand at a glance.

However, we recommend you start by creating a single Workflow in your Drip account. If your Workflow begins to feel too big or unwieldy, you may need to create a separate Workflow for different sequences of actions.

At their best, Workflows should tell a clear story of a subscriber's journey. If the story is muddy, that may be a good indicator that you should separate your Workflow into multiple Workflows.

Here's an example: Your onboarding flow has steps for trial

subscribers who haven't entered payment information, with a Goal sending them into the next phase of their sequence as soon as they surrender their credit card info.

Somewhere in the middle, you want to start educating your new trials on the best use of your product. You have an instruction course on Gumroad that you're offering to them for free.

Thinking this through, though, you realize you may send other subscribers this free course, too, not just your trial users.

Instead of inserting these steps into the current Workflow, you can isolate it as its own Workflow—a *nested* Workflow. This allows you to:

- Not obscure the clear story of your parent flow
- Reuse the Workflow in other instances

> Can you add a subscriber to a different Workflow from within a Workflow?
>
> Yes, you can do this by using the "Start a Workflow" action. This is a common practice if you have a Workflow that contains a set of steps that you will reuse in several different Workflows. When you nest a Workflow within a Workflow, you don't need to add an entry trigger to the nested Workflow.

When extra-campaign things need to happen, and you don't want to remember to add them each time you put a campaign in a Workflow, make a nested campaign with those actions.

How to edit a published Workflow

When you finish building your Workflow and press the "Start" button, you'll see subscribers make their way through your Workflow.

Editing a draft Workflow is simple: Just delete or add steps as needed. But, when your Workflow is live, and subscribers are in it, editing your Workflow requires you to first make a copy of the original Workflow and make your edits in the new copy.

This is because a Workflow with subscribers in it must first finish performing scheduled actions for all subscribers before it can be edited.

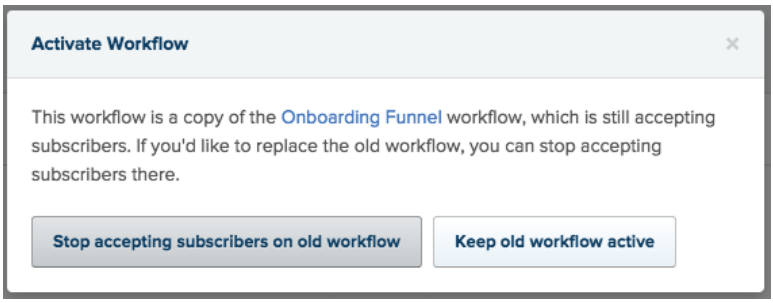
To make edits to a published Workflow, follow these steps.

Make a copy of the Workflow you need to edit.

Click the "Create a copy" button in your Workflow menu bar.

Start accepting subscribers on your new Workflow, and stop accepting them on the old one.

Once you've made the edits you need, you can start your copied Workflow. Pressing the "Start" button on a copy of a Workflow will bring up this model:

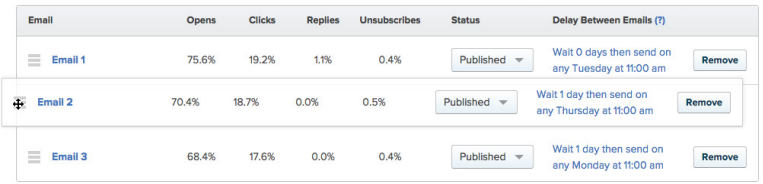


Typically, you'll want to stop accepting subscribers on your old Workflow as soon as your new version goes live.

Using campaigns in Workflows

The beauty of Workflows is you can chain many actions together sequentially, in a well-documented chart.

Workflows make it easy to chain one-off emails together and separate them with delays… which may leave you wondering if, and how, you should use campaigns in Workflows.



Campaigns are designed to let you manage drip-style email sequences with ease.

Re-ordering emails, inserting emails, or having 100 one-off emails in your sequence is a painful proposition in Workflows.

Campaigns are table-based, and are the best tool to use when you have a number of sequenced emails to send in your Workflow.

Here's how campaigns can add power to your Workflows:

- Creating a campaign is easier to do than creating a string of one-off emails in your Workflow. Campaign emails are compiled in a table builder and are designed to be easy to edit (including drag-and-drop reordering).
- A campaign can be reused in other Workflows.
- Subscribers can start a Workflow and be added to a paused campaign.

- If a subscriber is removed from a campaign, but later needs to be re-added, you can ensure they won't receive emails that they received in the past.

However, there are some reasons why you might want to use a sequence of one-off emails separated by delays:

- You need to change the from name on your emails mid-sequence
- You need to add Actions in between emails in the sequence, like adding a tag

Conclusion

By now, you should know everything you need to build your first Workflow. If you were following along closely, you may have already gotten started, or even turned on a live Workflow and started accepting subscribers.

If that's the case, congrats! If you haven't gotten started yet, you can use the planning worksheet to start transitioning any simple rules you have into Workflows.

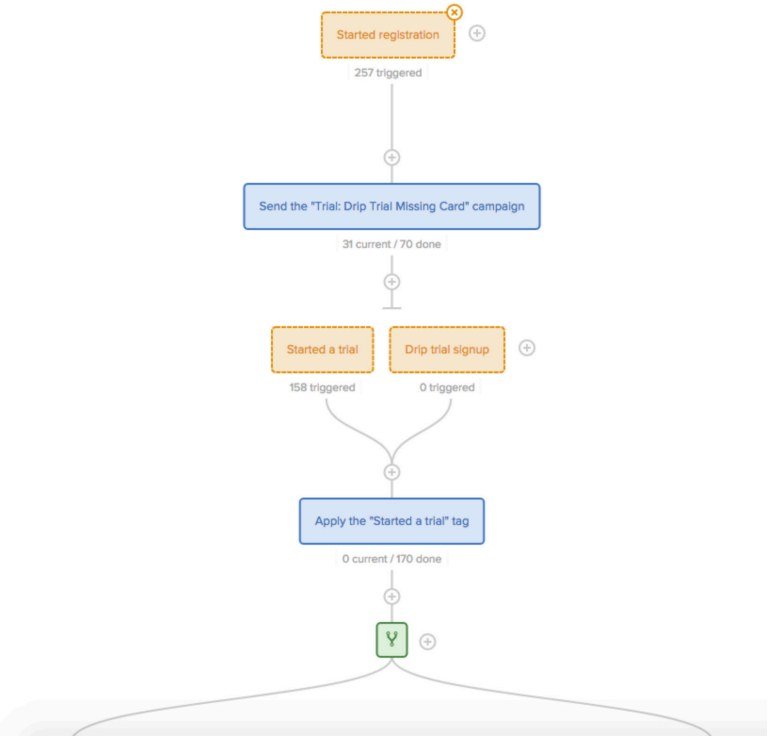
Use this worksheet to inventory each of your rules and identify which Workflow you should recreate them in. (Make a copy of the worksheet in your Google Drive for your own use)

Read on for additional resources, including Workflow blueprints that can give you inspiration for your own flows, and a case study from DNSimple that illustrates an unconventional, but powerful, use for Workflows.

As always, feel free to send me an email directly [anna@getdrip.com] with questions or rave reviews. I'd love to hear from you.

Additional Resources: Workflow Blueprints

Workflow Blueprint: SaaS Trial & Onboarding



Designing a Workflow to onboard trial users and customers of your SaaS app is simple.

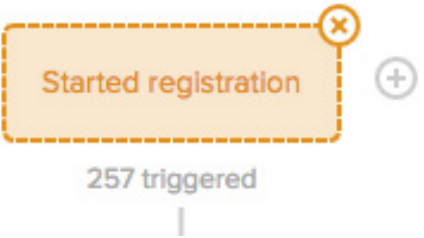
In its most basic form, your onboarding Workflow will include a few Goals:

- Started registration
- Started a trial
- Completed onboarding
- Became a customer

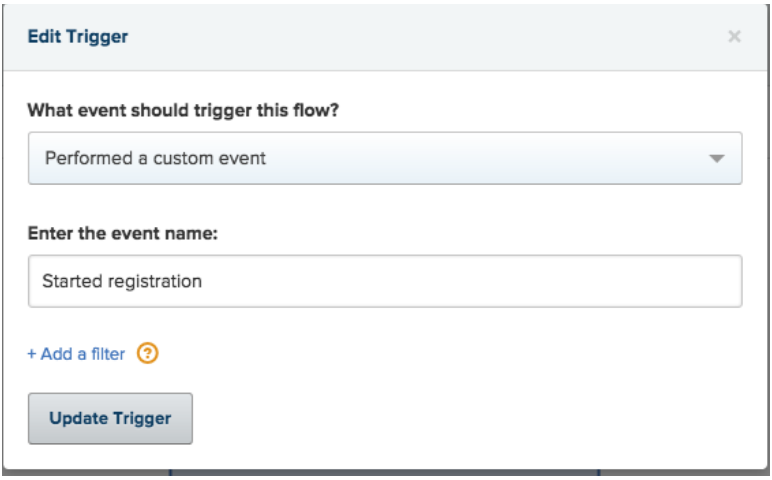
This blueprint will show you how to use Goals, campaigns and tags to create a Workflow that nurtures your trial users toward paying customers.

Start your Workflow with a "Performed a custom event" trigger.

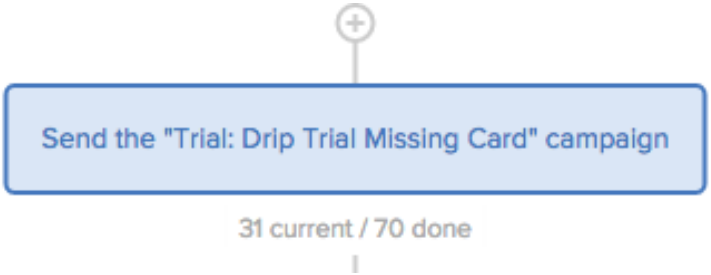
If you haven't yet connected your website to send events to Drip using Drip's API, use our API documentation to get started.



In this case, the custom event triggering signup is "Started registration."



Prompt trial users to enter payment information.



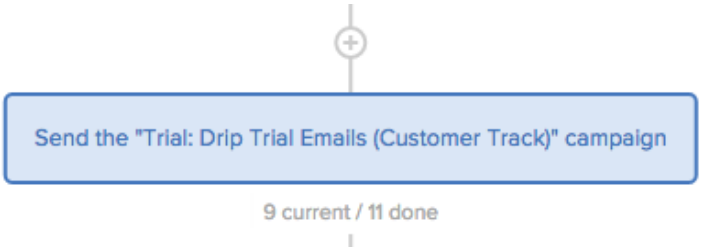
If your app requires a credit card before a user can begin their trial, include a campaign of emails urging the user to enter their payment info.

Include Goals and tagging.

Your first set of Goals will remove trial users from the Missing Card campaign as soon as they enter payment information. Record this Goal using a custom event sent from your payment processor (Stripe, PayPal, etc).

Add a tag to indicate their trial has started.

Start your onboarding campaign.



Create a Drip campaign with emails describing each step of your onboarding process. Set Delays appropriate to your trial length.

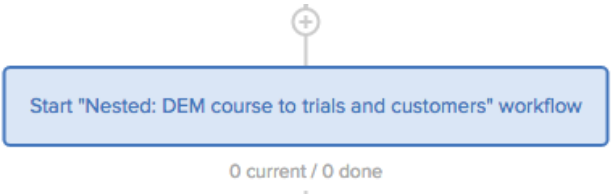
Once your campaign is ready, add it as a "Start a Campaign" Action in your Workflow.

Add "Completed Onboarding" Goals.

Include "Performed a Custom Event" or "Applied a Tag" Goals that will pull trial users out of the Onboarding Emails campaign as soon as they complete the onboarding process.

This way, users who have successfully onboarded will no longer receive the campaign you designed to help them complete their setup process.

Start sending educational or lifecycle email campaigns.



In this example, we've included a nested Workflow, but you could add this as a single campaign. These emails are designed to help your users learn the ins and outs of your platform and achieve long-term success with your app.

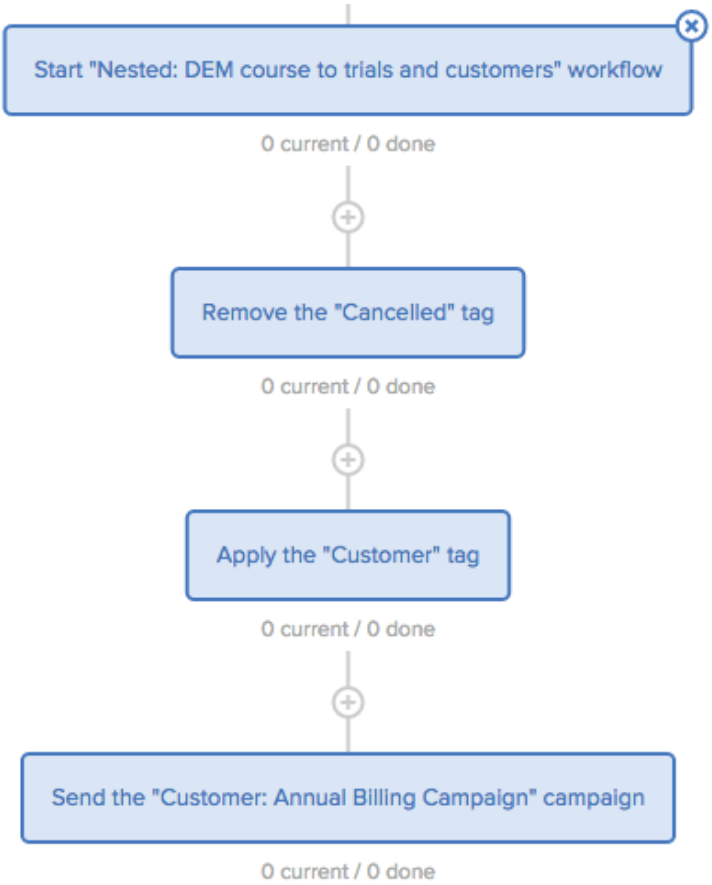
Record trial-to-paid conversions.

Include Goals triggered by custom events that indicate when a trial user starts paying you money, or when a cancelled user reactivates their subscription.

Any user that converts to a customer will be pulled to this Goal in your Workflow, and pulled out of all campaigns, Delays, nested Workflows, or Exits above this Goal.

This means you should add your lifecycle campaign or nested Workflow again below this Goal, so newly converted customers won't lose their spot in that cycle.

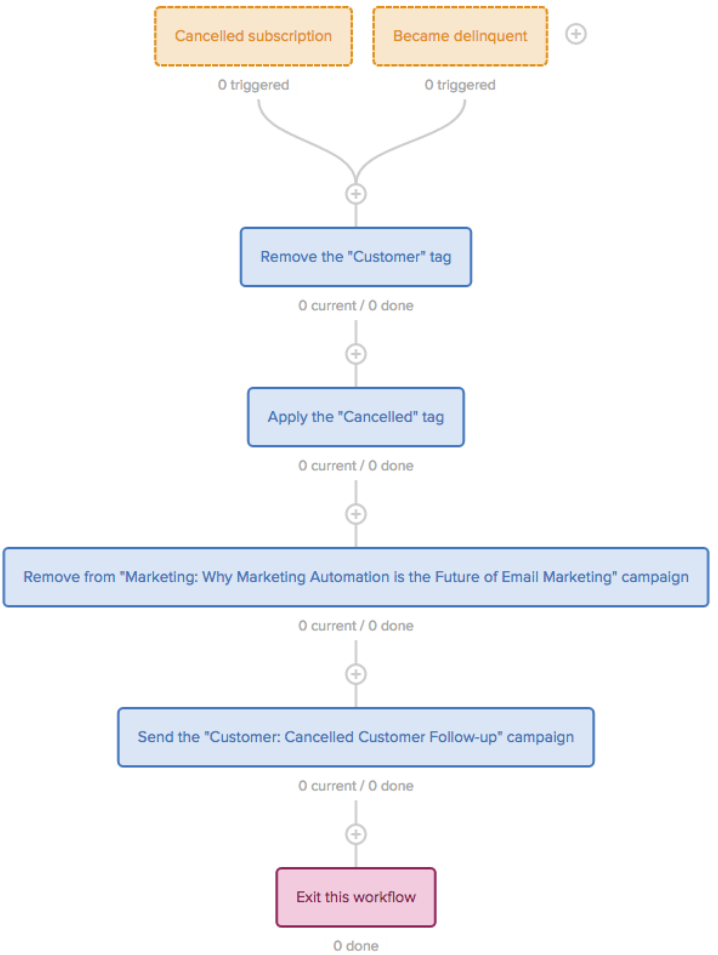
Removing a subscriber from a campaign or Workflow and later re-adding them will put them back at the spot they left off.



At this point, you can remove and add tags indicating the customer's status.

In the example above, the "*Customer*" tag is added, the "Cancelled" tag is removed (remember, the Goals directly above this step process new customers as well as ones who may have cancelled and reactivated), and subscribers start a campaign pitching a discount when they upgrade to annual billing.

Add Goals and steps for cancelled or delinquent users.



When users cancel, or when their credit card payments fail, they should stop receiving marketing and lifecycle campaigns and be segmented appropriately.

In the above example, there are two Goals: Cancelled Subscription and Became Delinquent. When a subscriber triggers either of these Goals, they'll be pulled out of all prior steps in this Workflow—they will stop receiving onboarding, lifecycle, or educational emails.

Their "Customer" tag will be removed, and they'll receive a "Cancelled" tag, allowing you to use Drip to track churn.

Workflow Blueprint: eBook Download

When setting up funnels, most people focus on marketing before the sale. But if you neglect to automate after the sale, you could be missing out on converting your customers a second time.

In this blueprint, you'll learn how to create a post-purchase funnel for eBooks that will let you market a related, higher ticket item to your existing customers.

See the entire blueprint here.

Create your trigger.

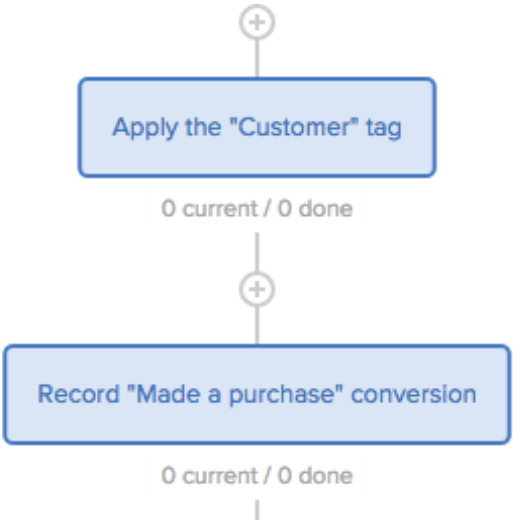
Depending on your selling platform, create your blueprint with

the “Made a purchase” trigger or the “Performed a custom event—Made a purchase” trigger.

Create your steps.

Apply a tag and record a conversion. Tagging allows you to easily segment your subscribers based on who has purchased from you and who is simply receiving your marketing emails.

Recording a conversion allows you to track the impact your campaigns, broadcasts and Workflow funnels have and track ROI.



Send a one-off email.

Your one-off email can include a thank-you message or instructions on how to download the book.

Add a Fork.

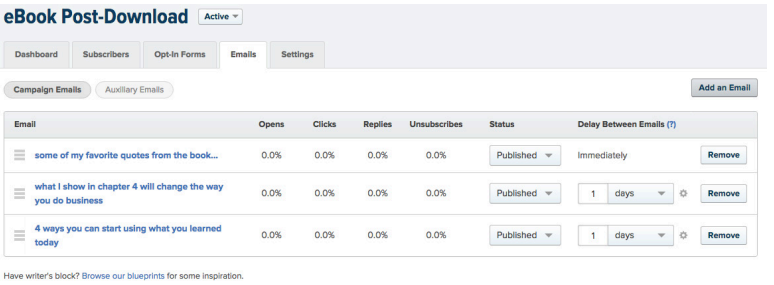
A Fork allows you to do *multiple things* at once in a Workflow. Adding a Fork will let you send an upsell campaign to your customers while sending them an accountability campaign that helps them get the most out of your book.

Send a campaign.

Sending a post-purchase accountability campaign gives you another opportunity to deliver value to your customer.

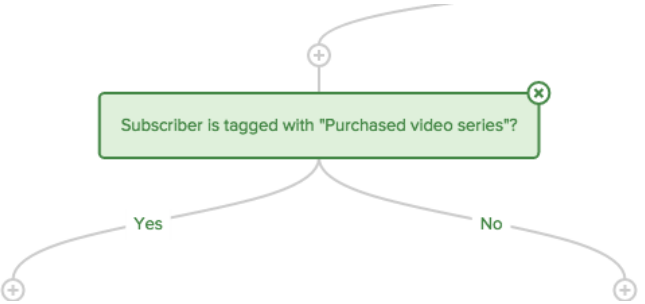
While we'd like our customers to read every word we publish, watch every second of our videos, and use the strategies we promote without any encouragement, helping your customers succeed after the sale isn't something we should take for granted.

Accountability campaigns not only show your customer you're invested in their success, they give you more chances to deliver value to them. And if you're successful in helping them reach their Goals, their likelihood of recommending you to others goes way up.



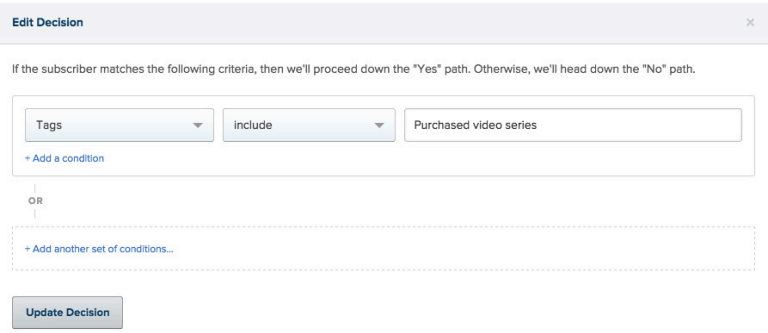
Create a campaign with a handful of emails. You can include quotes from your book, case studies of implementation, opportunities for click to tweet (giving your book virality on Twitter), and invitations for your readers to contact you directly.

Add a Decision.



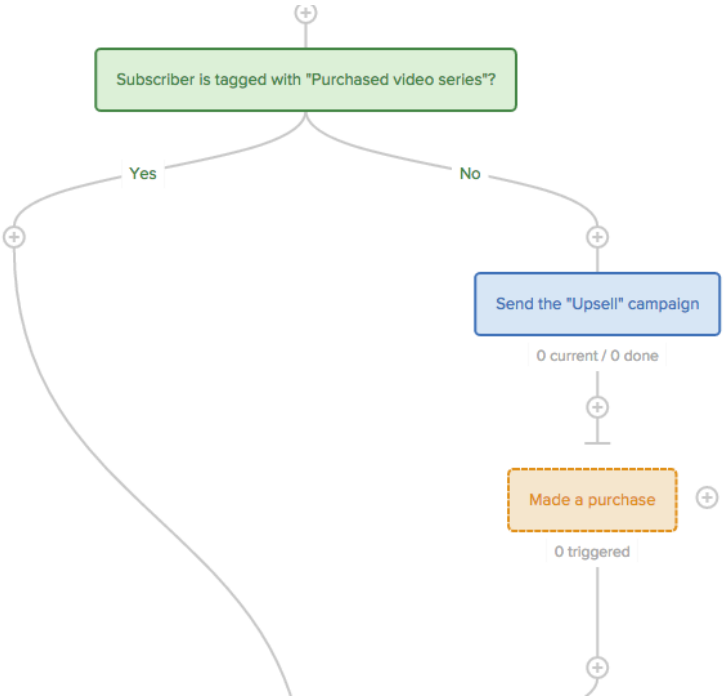
Decisions let you perform actions if certain conditions are met, letting you smartly decide which actions should happen to which subscribers.

At this step in your Workflow, you'll use a Decision to make sure anyone who has already purchased the product you're upselling won't receive your pitch. Only your customers who have purchased your eBook or basic product will get the upsell campaign for your big-ticket item.



Use logic to filter out customers of your big-ticket item. In this case, we'll filter by tag, but you could also filter by event or however you're recording your customer segments.

Start a campaign.

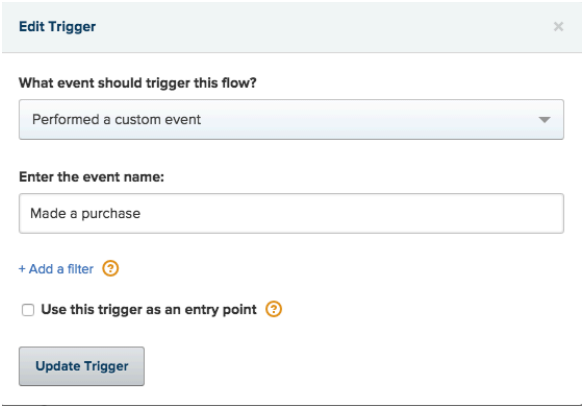


If a subscriber doesn't match the criteria for having purchased your upsell item, start sending them a campaign designed to push them toward the big conversion.

This could be a handful of emails with a discount coupon, some testimonials or case studies, or a free sample of the product.

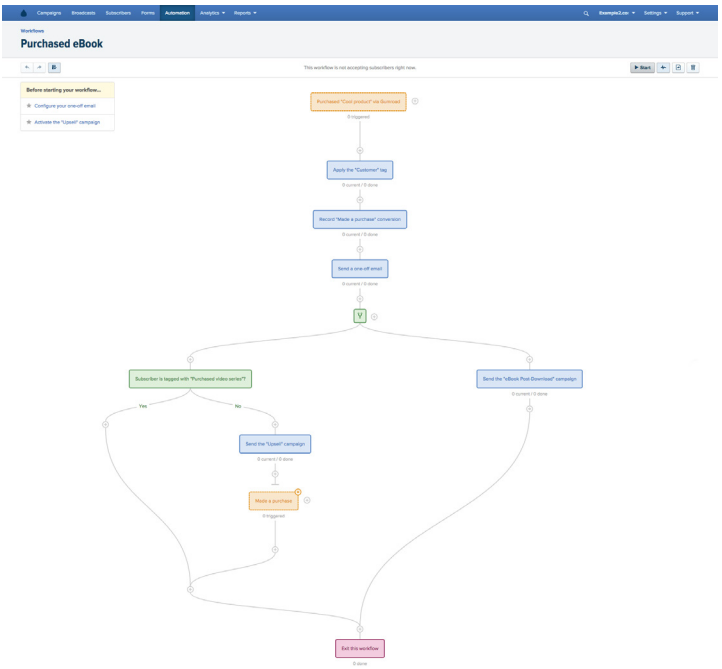
Add a Goal.

If a subscriber makes the purchase, you'll want them to stop receiving emails promoting the product. Adding a Goal below your upsell campaign will remove them from that campaign as soon as they make the purchase.



Use the “Made a purchase” trigger and connect with one of your products on Gumroad or another cart, or add in a custom event with the “Made a purchase” name.

Your Workflow is now complete, and it looks like this:



Workflow Blueprint: Brennan Dunn's At Your Own Pace Email Course

If you're using Drip to send an email course, you'll find that people are most eager to learn from you when they first sign up.

Brennan Dunn realized this and created a method using Workflows to keep eager learners engaged with his course.

Based on their interaction with his lessons, Brennan's subscribers who engage with his course will advance at their own pace, rather than waiting for Drip's Delays to send their next lesson.

If his subscribers opt in and do nothing, they get all the lessons at the regular pacing using a Drip campaign with standard delay settings.

But if they complete the worksheets he includes in his course, they can advance to the next lesson immediately. That way, if his subscribers are highly engaged, they can get the entire course when they're showing the most interest and are most ready to learn.

At the end of his course, he also uses an evergreen launch to promote his paid info product.

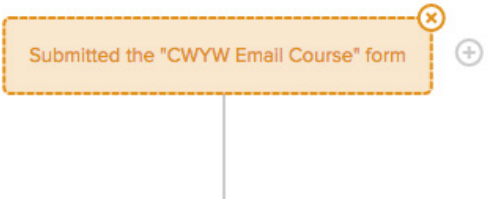
To create a course like this, you'll need:

- Drip
- Worksheets using Gravity Forms
- Optional: a paid product to promote

Create a Workflow with Triggers for the start of your course.

Include any Triggers that could start someone in your course, like submitting a form, clicking a trigger link, or making a purchase.

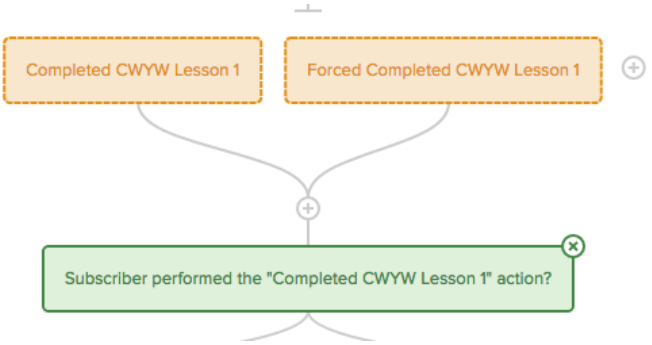
Brennan uses the “submitted a form” Trigger.



Add your first Action: A one-off email with their first lesson.

Brennan includes a Delay of two days and records a custom event, which he uses later for the at-your-own-pace structure.

Create your first Goals.

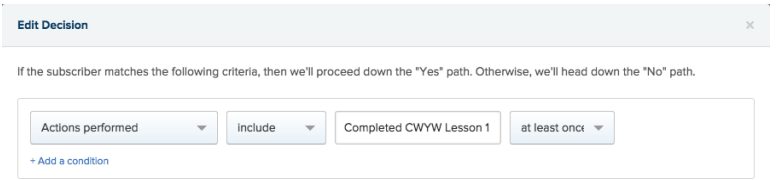


Brennan creates two Goals. A subscriber could proceed by either:

- opening the first email and completing the worksheet (Completed CWYW Lesson 1)
- or by a normal course delay of two days (Force Completed CWYW Lesson 1)

Subscribers will wait until either Goal is triggered before they proceed. Either way, the subscriber will proceed in the course.

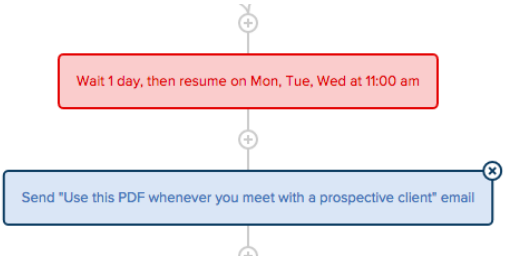
Add a Decision.



The filter for this Decision is "Actions performed include Completed CWYW Lesson 1."

If a subscriber has completed this custom event, they'll get a tag.

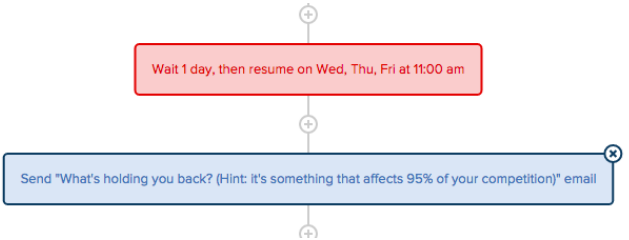
Continue this process for the remaining lessons in your course.



After the last lesson is sent, Brennan sends his closing summary of the course, including a PDF resource. Then, he preps his course subscribers for a timed launch of his *Double Your Freelancing Rate* course, which he sells.

End of course: Offer an evergreen launch with time-delayed discount

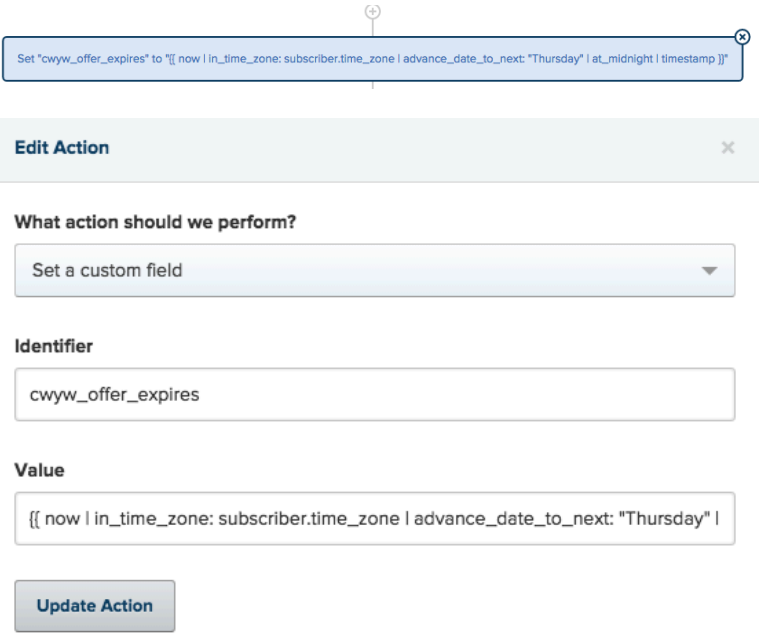
Brennan sends his paid course pitch email on Mondays, Wednesdays, or Fridays at 11 a.m., with a Monday through Thursday discount window.



After a delay, he checks to see if the subscriber has purchased the course. If no, he creates a sales process to pitch a special offer to his subscribers.

Brennan uses Liquid tagging to create a dynamic link that changes based on his subscriber's time zone, allowing him to expire the discount offer. Here's how he structures his Liquid link:

1. Set a custom field.
Brennan uses Liquid to set a custom field that records a specific, unique future time for each subscriber. This lets him customize the time for the sales sequence that follows.



Here's the value of the custom field he records:

```
{{ now | in_time_zone: subscriber.time_zone | advance_
date_to_next: "Thursday" | at_midnight | timestamp }}
```

Here's what this Liquid template does: Translates the current time into the time zone of the subscriber, then advances the

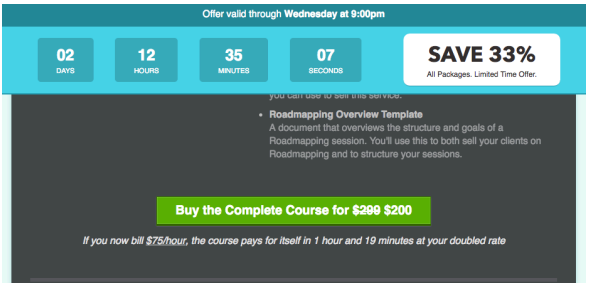
current time, in the time zone of the subscriber (not your sending time zone), to next Thursday at midnight.

2. Send your pitch email with a special link.
Brennan's pitch email uses Liquid to call the date set in step one.

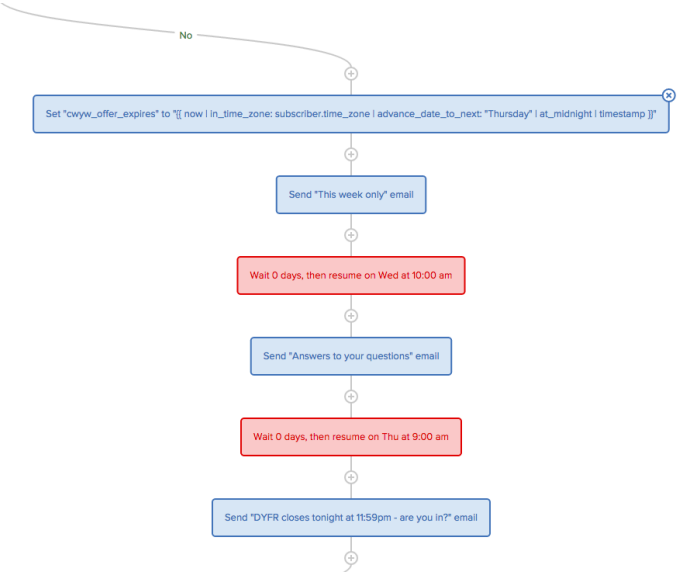
Here's how the link in his pitch email is constructed:

http://doubleyourfreelancing.com/r/{{ **subscriber.utm_affiliate | default: 'default'** }}/**?offer=**{{ **subscriber.cwyw_offer_expires** }}

Brennan's course landing page has a countdown timer that updates based on the offer's link structure:



3. Send pitch sequence until the offer expires.

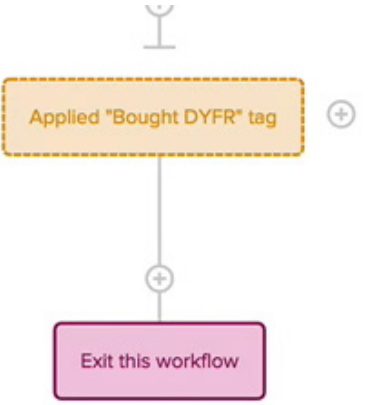


Brennan's pitch emails are sent with Delays between them, and he ends the pitch on the day the offer expires—Thursday.

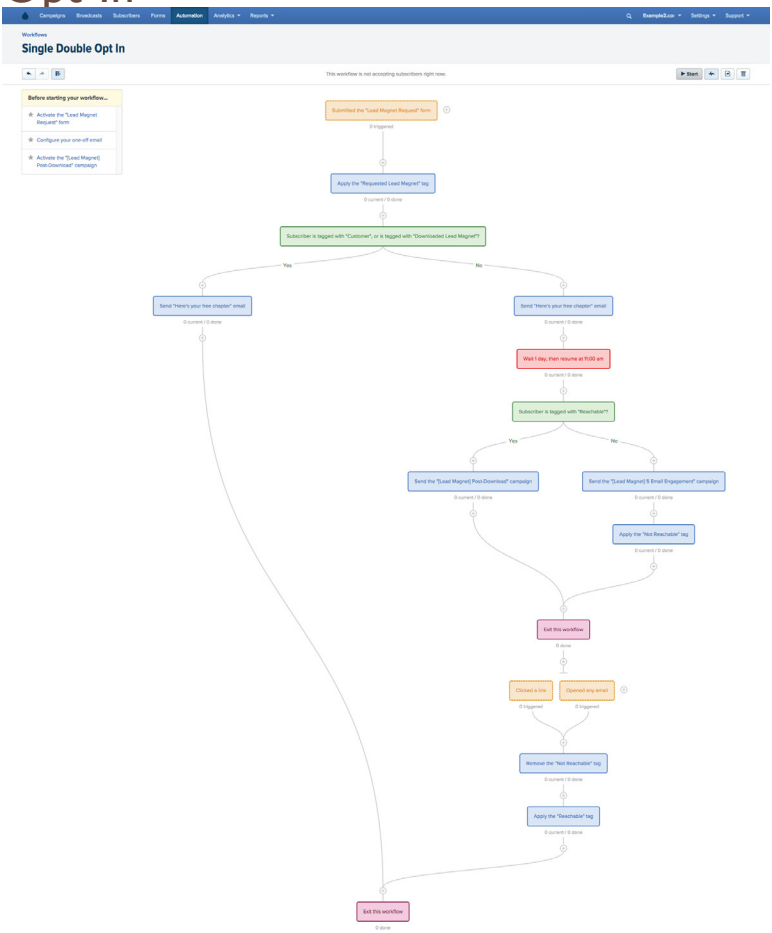
Create your final Goal.

Brennan ends his Workflow with a final Goal, defined by a tag getting applied.

If at any point a subscriber purchases his *Double Your Freelancing Rate* course, Brennan applies a tag, and because this Goal is in place, that Action will remove the subscriber from all steps that came before the Goal in the Workflow, including all pitch emails.



Workflow Blueprint: Single-Double Opt-In



Double opt-in is renowned for keeping your list quality high. Marketers who use double opt-in see higher engagement: more opens, clicks, and replies.

Simply put, double opt-ins = a healthier list and a higher sender reputation.

For the sake of clarity, here are simple definitions for single and double opt-ins:

Single opt-in: someone expresses interest and is immediately added as a subscriber.

Double opt-in: someone expresses interest and is not added as a subscriber until they confirm their subscription by clicking a link in a confirmation email.

You can keep the technique of double opt-in while not losing people who may miss your opt-in confirmation email by using the *Single-Double Opt-In Method*, designed by Chris Davis of Automation Bridge and LeadPages.

The Single-Double Opt-In method allows you to nudge people who have not engaged with your emails for a period of time until they are truly unreachable. It has the immediate interaction of a single opt-in strategy, but the list quality benefit of a double opt-in approach.

Here's how to set up the Single-Double Opt-In tactic with Visual Workflows.

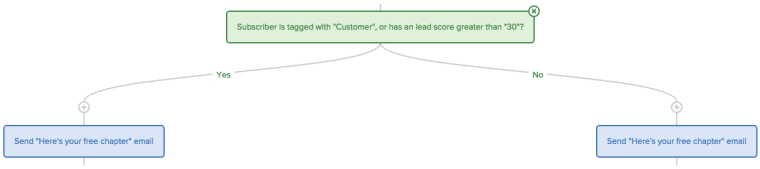
Set up your Trigger.

Trigger subscribers on your Workflow with the "Submitted a form" event.

Apply a tag.

This allows you to filter by who has requested the lead magnet but has not yet downloaded it.

Filter your subscribers with a Decision.



If someone is a *customer* or has *already downloaded the lead magnet*, they should receive a different campaign saying something like, "You already requested this, but here it is again." If not, they're either a new subscriber or an existing subscriber who hasn't gotten your lead magnet yet.

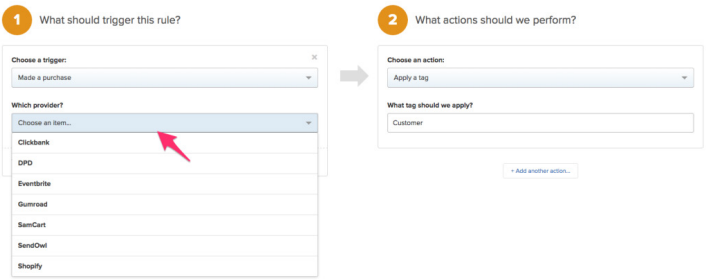
In order to structure your Decision properly, you should filter using tags indicating when a subscriber:

- Becomes a customer
- Downloads the lead magnet

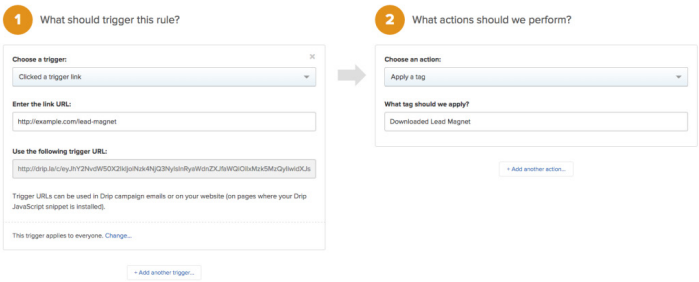
Create simple rules to apply tags.

To apply tags when these things happen, create two simple rules in Drip. Simple rules run outside of Workflows and include at least one Trigger and one Action.

Here's how to apply a *Customer* tag when someone makes a purchase from you:

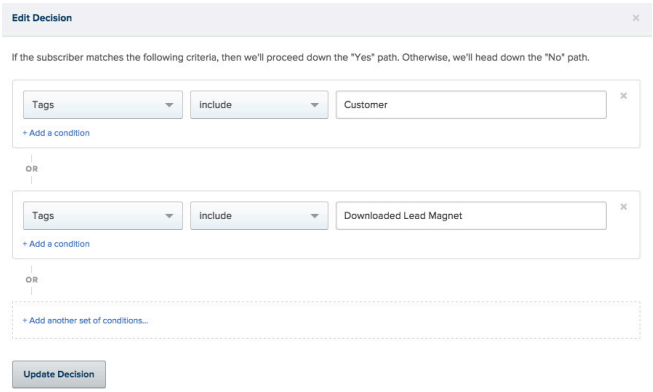


Here's how to create a simple rule that applies a *Downloaded Lead Magnet* tag when someone clicks your lead magnet link:



Once you've created these simple rules, you can now use these tags to filter your Decision.

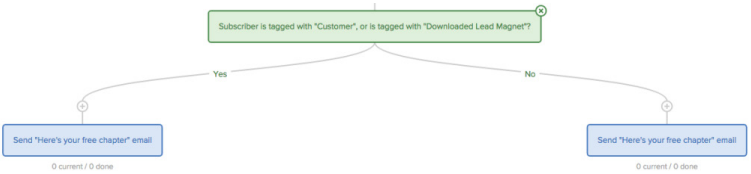
Structure your Decision like this:



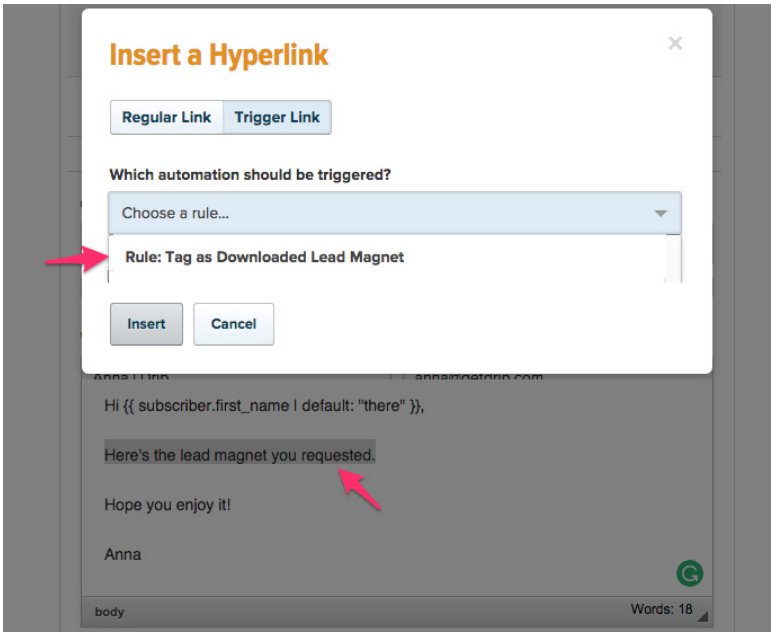
Regardless of which side of your Decision a subscriber lands, they should receive the lead magnet right away—even if they requested it before.

But if they're a new subscriber, they should go through your engagement path, which will allow you to keep your list in good condition without the awkwardness and friction of a double opt-in confirmation email.

Deliver the lead magnet to both subscriber groups in the "Yes" and "No" paths of the Decision tree.



Once you add a one-off email delivering your lead magnet, insert the link you created in the trigger link simple rule.

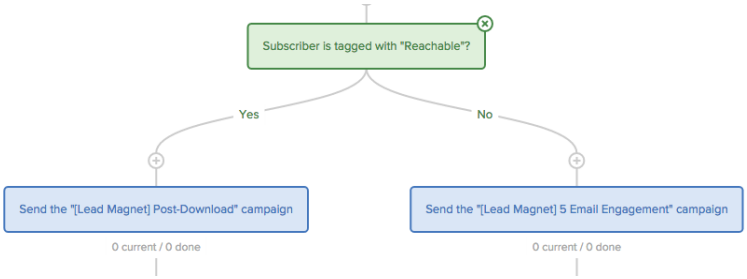


This way, as soon as a subscriber downloads your lead magnet, they'll be tagged with "Downloaded Lead Magnet."

Add a Delay.

Start by sending your new subscribers the lead magnet they requested. Add a one-day Delay to your path. This Delay will give your new or stale subscribers time to open your email before you start sending them reminder emails in your Engagement Campaign.

Add a Decision.



If a subscriber is tagged with "Reachable," send them a campaign that includes information you want them to receive after

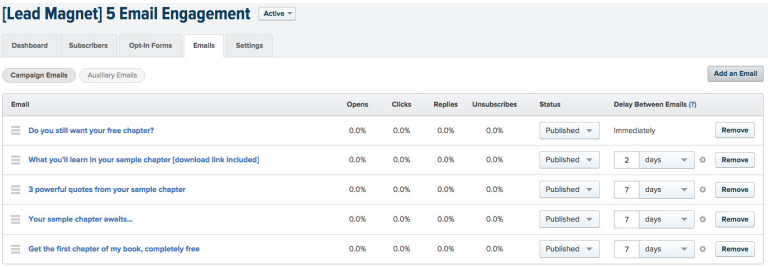
they download your lead magnet. If they're not tagged with "Reachable," add steps to create an engagement path.

Create an engagement path.

The path you're about to create will be placed in the "No" side of the Decision tree, applying only to new subscribers who don't have the "Reachable" tag.

This path will also contain an Exit and Goals, which allow you to pull a subscriber out of the engagement path and place them into your marketing campaign once they engage with your emails.

Create your Engagement Campaign.



The purpose of this campaign is to give your new subscribers reminder nudges to download your lead magnet, and to give them chances to engage with your emails. If they open or click any of the emails, they've effectively "opted in" to continue to receive emails from you. And if they never open or click, you can safely assume you shouldn't send to them.

In this campaign, you'll want to include several emails that go out over about 30 days. This will give your new subscribers ample opportunity to open or click on your emails.

At this point, you may be wondering why using a campaign is preferred over putting multiple one-off emails, separated by Delays, on your path. Both will achieve the same results, but using a campaign has a few advantages:

- Creating a campaign is easier to do than creating a string of one-off emails in your Workflow. The emails are compiled in a table builder and are designed to be easy to edit (including drag-and-drop reordering).
- A campaign can be reused in other Workflows.
- If a subscriber is removed from a campaign, but later needs to be re-added, they won't receive emails that they received in the past.

Once you've created your campaign, add it to your Engagement Path after the one-day Delay.

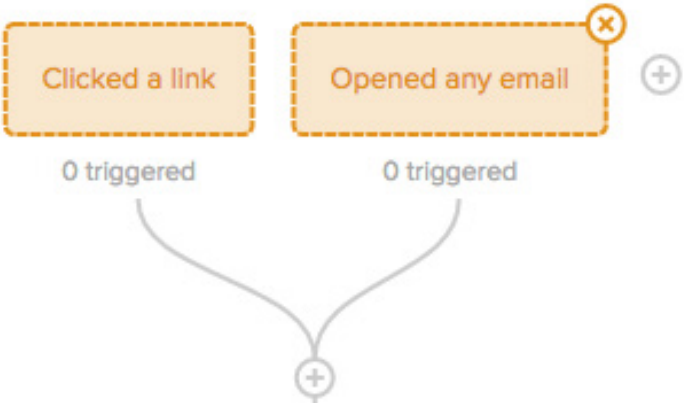
Apply the "Not Reachable" tag.

If someone receives all five emails in your Engagement Campaign but does not open them, they've proven themselves to be unreachable. Tag them as such. You can use this tag to exclude these subscribers from your future broadcasts.

Include an Exit.

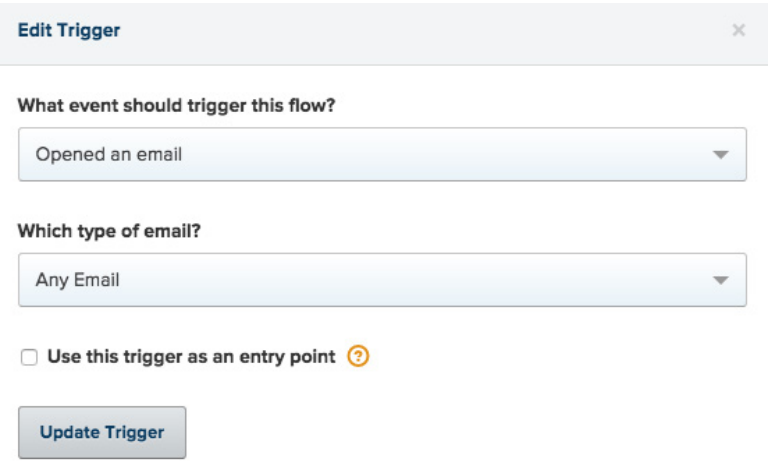
After your Decision closes, add an Exit. This will remove subscribers who were tagged with "Reachable" after they receive your follow-up campaign, and it will also remove subscribers who never interact with your 30-day Engagement Campaign and are tagged with "Not Reachable."

Set up Goals.

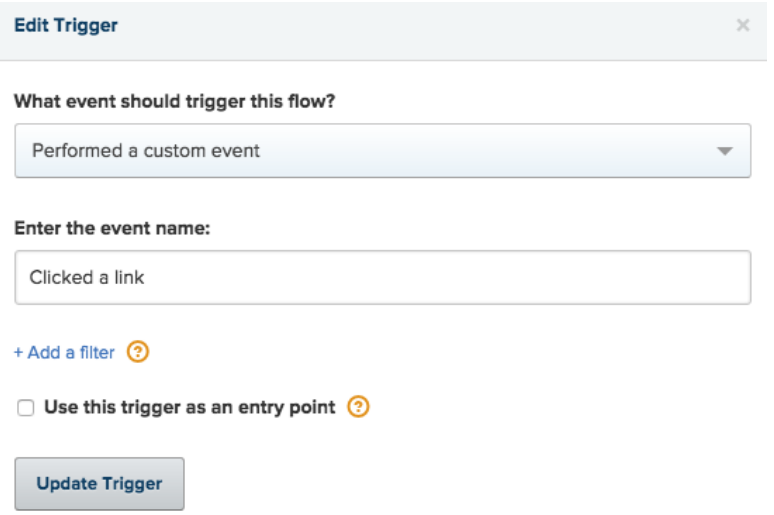


This is one of the most critical steps in this blueprint. Setting up Goals allows you to pull any subscriber to this point in the path as soon as they engage with your emails.

Use the "Opened an Email" Goal Trigger, with "Any Email" selected. This way, if a subscriber opens any of your emails, they'll exit all the steps before (for example, the Engagement Campaign) and proceed as a "Reachable" subscriber.



Also include a “Performed a custom event” with the “Clicked a link” event name which triggers when a subscriber clicks any link in any of your emails.



Remove and add tags.

Remove the “Not reachable” tag after the Goal. Add the “Reachable” tag.

Your Single-Double Opt-In Workflow is now ready to start accepting subscribers.

Workflow Blueprint: Product Demo

If people request product demos from you, you know how they can take a lot of time to schedule, and can quickly take over your calendar.

Scheduling a time to meet without filling your entire calendar with demos will make you want to hire a personal assistant. Prequalifying demo requests requires research time.

And making sure someone actually schedules a demo with you after they request one sometimes requires multiple followups.

Here at Drip, we ran into all of these problems, so we built a Workflow to solve them.

When people request a demo on the Drip home page, we ask for a few pieces of information, including their total subscriber count. Your platform will have its own qualifying metrics, but we use subscriber count to determine if the request should be served by a recorded demo or a one-on-one demo.

A low subscriber count sends the lead a recorded video, and a high subscriber count sends the lead a link to schedule a demo with us.

We also send every lead who requests a demo an offer for our marketing automation crash course and a copy of our email marketing books.

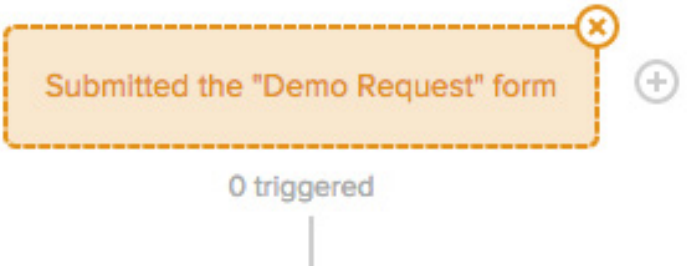
Throughout the Workflow, we use Goals to change the emails we send based on a subscriber's behavior—whether they've scheduled their demo or watched the video, for example.

Tools we use for this Workflow:

- Google Calendar
- Calendly
- Zoom

Create a Trigger.

If your leads request demos using a form, as ours do, include this as a Trigger. You might also have a Trigger link or a landing page submission that might trigger the request.

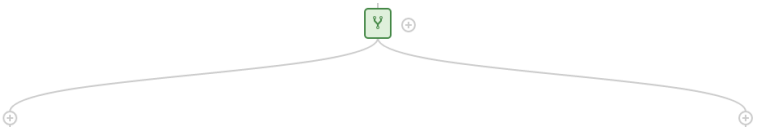


Apply a tag for segmentation.

We apply the "Demo Requested" tag to track which subscribers have requested a demo, and use this for segmentation in future broadcasts.

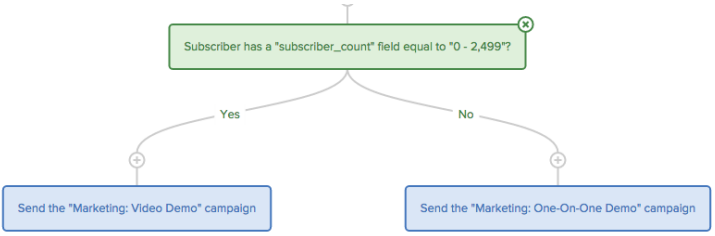
We also record an event, which allows us to filter by date who has requested a demo.

Add a Fork.



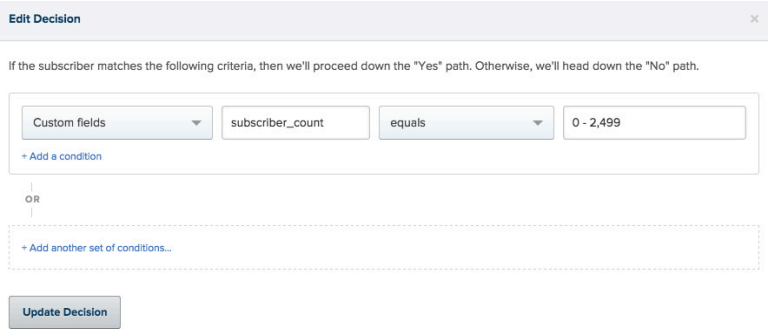
Including a Fork lets you do multiple things at the same time in your Workflow. We add a Fork to allow us to send a video or scheduling information, and send educational resources simultaneously.

Add a Decision.



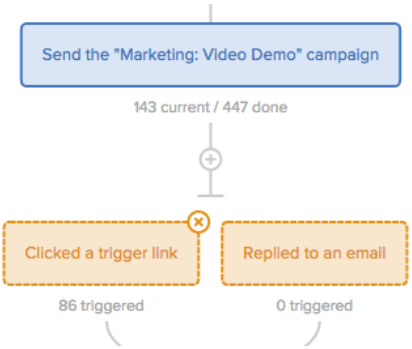
If you prequalify your demos, use a Decision to filter who should receive what email.

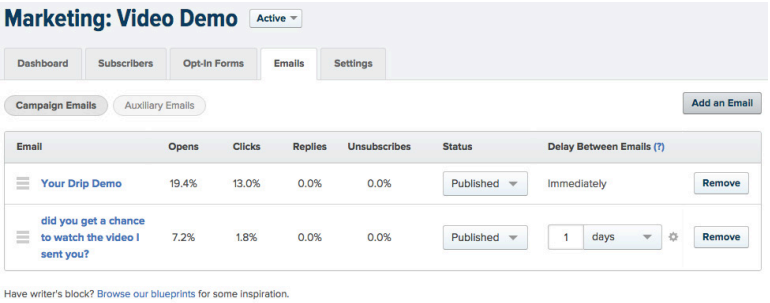
At Drip, anyone under 2,500 subscribers gets a demo video, and anyone above that gets a link to schedule a one-on-one session.



The "Yes" path: Demo video delivery

If the person requesting the demo selected "0–2,499" as their subscriber count, I send them a campaign that looks like this:



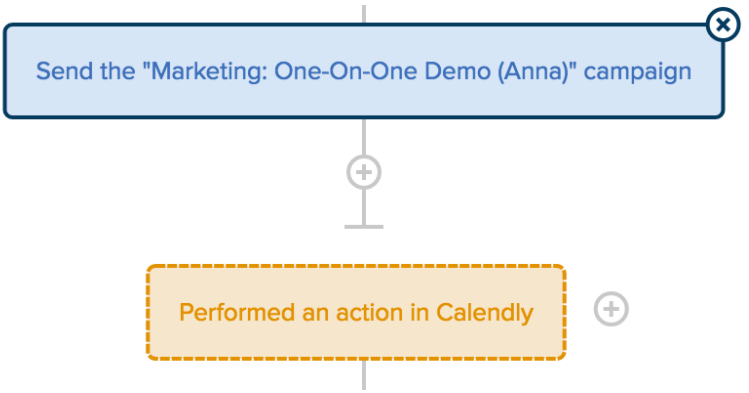


If a subscriber clicks the link to the video in either email, or if they reply to any email I send in that campaign, they'll trigger a Goal and proceed in the Workflow. If they don't click the link or reply, they'll get a reminder email a day later.

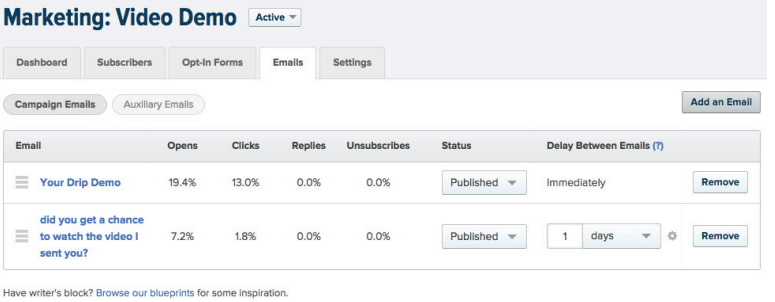
The "No" path: Schedule a one-on-one demo

If a subscriber selected any subscriber count greater than "0–2,499," they'll get an email from me with a Calendly link to my calendar. They can schedule right then and there, and I send out a reminder email to them 30 minutes before their session with a link to the Zoom (web meeting and screensharing tool) room for the demo.

Here's what it looks like in the Workflow:



And here's the "Marketing: One-On-One Demo" campaign:



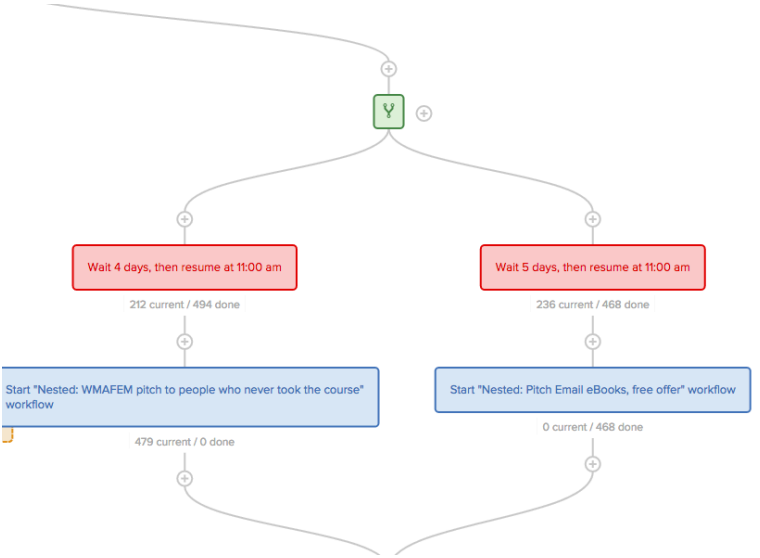
Subscribers will keep getting the reminder emails in this campaign if they don't schedule a demo with me in Calendly, which triggers the "Performed an action in Calendly" goal.

The final Goal in the Workflow is "Started registration," which is a custom event triggered by an API call to Drip's REST API. If anyone in the Demo Workflow starts a Drip trial, they'll trigger this Goal and be removed from the Workflow.

Marketing collateral: Bonus freebies for people who request a demo

While I'm sending subscribers reminders about their demos, I'm also sending them two Drip freebies to help them learn about email marketing and marketing automation. This way, they start getting value from Drip right away, even before they're a user. And when they ultimately convert to a user, they understand better what they want to do with their marketing and are in a better position to be successful.

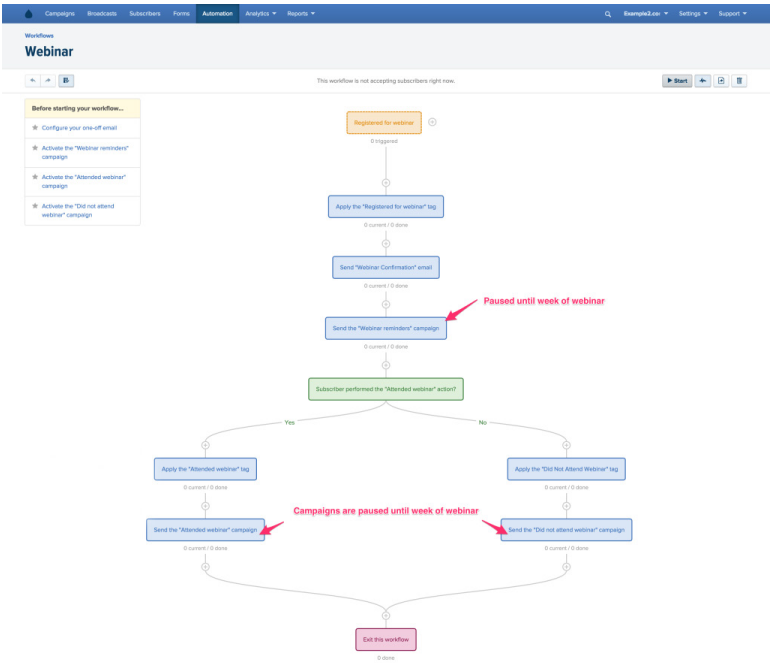
I do this by creating a Fork early in the Workflow:



I use two nested Workflows for this, because I needed to include complex logic to determine if someone should get the pitches for the freebies or not (if someone already downloaded the books, they should not get a pitch from me to download them again). I also wanted to reuse these pitch Workflows in other places.

There you have it! This is how we automate demos at Drip, from start to finish.

Workflow Blueprint: Marketing Webinar



If you've ever run a webinar, you know getting someone to register to attend is only half of the process. You still have to get them to show up, and once they do, get them to convert afterwards.

You can do this manually with quite a bit of effort, or you can use a Drip Workflow to handle it automatically.

To completely automate your webinar communications, you'll need to address three phases of webinar marketing:

1. **Post-registration.** This includes a registration confirmation email, a reminder the day of the webinar,

and one email just before the webinar starts.

2. **Non-attendees.** Despite your well-timed and slick reminder emails, there will be a segment of folks who don't attend the webinar. Creating a sequence in your Workflow to talk to these people lets you stay engaged with them for a future conversion.
3. **Attendees.** Deliver collateral from the webinar and include CTAs.

You'll build a section of your Workflow for each of these phases. You'll also:

- Build a transition for long-term lead nurturing for everyone who doesn't purchase after the webinar
- Make sure you don't pitch a product to someone who has already purchased it

Note: Depending on which webinar platform you use, you may be able to automate segmenting people who attended versus those who did not attend. But for most webinar platforms, you'll have to record this manually through a bulk operation. We'll cover how to set up for both situations in this blueprint.

Here's how to create this Workflow, step by step:

Add a Trigger.

If you are using a system like GoToWebinar, you can send a custom event to Drip using Zapier whenever someone registers.

If you decide to do this, use the custom event name as your Trigger.

Alternatively, you could use a Trigger like "Submitted a form" or "Clicked a trigger link" or both.

Apply a tag.

Apply a tag indicating the subscriber registered: "Registered for webinar" should do just fine. This will give you the ability to segment registrants later on.

Send reminder emails.

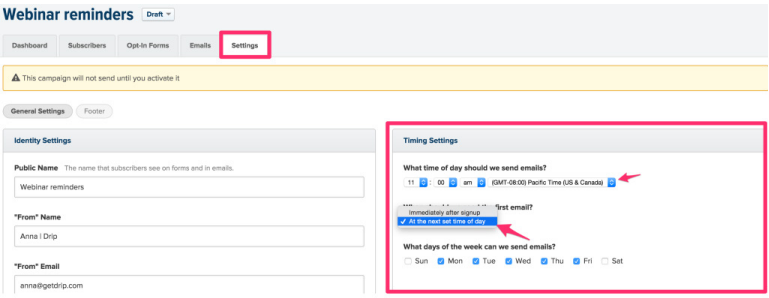
Send a confirmation email right away.

You'll follow up with three more emails: One 24 hours before the webinar ("Webinar is tomorrow"), one the morning of the webinar ("Join us today for the webinar"), and one as the webinar is starting ("We're live now").

Create a campaign.

This campaign will contain all three of your reminder emails.

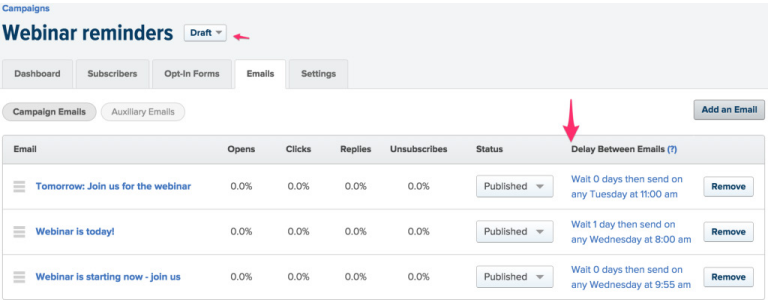
Adjust your campaign settings to send the emails in your local time zone, not the time zone of your subscribers. Also, adjust the first email to send at next set time of day, not immediately.



You can send more reminder emails if you choose, but at minimum, these reminder emails will make sure you stay top of mind with your registrants.

Make sure to adjust the Delays on your emails to fit your webinar schedule. For example, if your webinar is on a Wednesday at 10 a.m., your 24 hour reminder email (the first one in the campaign) should go out on a Tuesday.

Your day-of reminder emails should go out on a Wednesday—the first, a few hours before the webinar, and the second, just a few minutes before the webinar begins.



Important: Your reminder campaign should remain paused until the week of the webinar. Otherwise, your reminder emails could go out prematurely.

Now, add the campaign as the next step in your Workflow.

Post-webinar emails

Using GoToWebinar

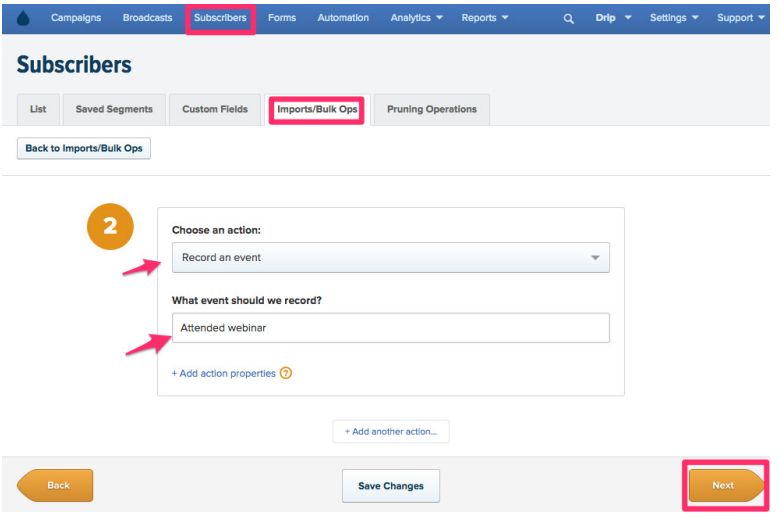
If you use GoToWebinar, you can set up a Zap to send a custom event to Drip when someone attends your webinar. This will let you automatically track those who did and did not attend and message them differently. When you set up your Zap, choose the "New attendee" trigger for GoToWebinar.

For your Zap action, record a custom event in Drip with the event name "Attended webinar."

Using all other webinar platforms

If you use another webinar tool, you'll need to manually track those who attended and those who did not.

In order to do this, you'll need to export from your webinar tool a list of subscribers who attended after the webinar is over. When you've exported that list, you'll upload it to Drip in CSV form via a bulk operation.



Once you've uploaded the CSV, choose the "Record an event" Action. Type in "Attended webinar" as the event name.

Schedule the operation.

Add a Decision to your Workflow.

Now that you have a system for tracking attendees, add a Decision to your Workflow. Filter your Decision by "Actions performed" and type in the event name "Attended webinar."

You now have created a "yes" and a "no" branch in your Workflow. The "yes" branch will contain your post-webinar campaign for attendees, and your "no" branch will contain a very similar campaign, with the same emails, with slightly different text and CTAs indicating they missed an awesome presentation and attempting to re-engage them.

Before you send the campaigns, add tags to both sides of the Decision: an "Attended webinar" tag on the "yes" side, and a "Did not attend webinar" tag on the "no" side.

There you have it: A Workflow for your webinars. You can copy this Workflow for each different webinar you run, or re-use it for recurring webinars.

Additional Resources: DNSimple Case Study

Antoine and the folks over at DNSimple received early access to Drip's Workflows and documented their entire setup process. Like a kid at Disneyland, they couldn't help but try every nook and cranny. In no time, DNSimple turned Workflows into the core piece of their onboarding strategy.

In this case study, Antoine pulls back the curtains on DNSimple's use of Drip's Workflows.

Some things are meant to be reinvented. Take your beloved Walkman from the 90s, for example. Sure it was one heck of a fashion statement and it worked like a charm, but eventually it became obsolete and lost its mojo: Have you ever tried to take a selfie or hail a ride with it?

Me neither.

The same goes for our onboarding emails in the pre-Workflows era. Up until a week ago, all we had to greet and guide our new customers at DNSimple was one meager email. Yup, one.

No fancy template, no witty jokes, nothing special. Just that one email that's been reliably plucking through since late 2010. This was, in some ways, our Walkman.

In a true "build a great product and they'll come" fashion, we've been able to gain tens of thousands of customers over the years at DNSimple banking on the assumption that most people "don't judge a book by its cover."

Well, these times are over. It seems that every company out there—including our beloved competitors—have been bedazzling their 'book covers' lately. While the packaging doesn't make a poor product any better, it definitely blurs the perceptions when it comes to shopping for it.

In that vein, it was time to bid farewell to our good old single onboarding email strategy and better communicate who we are and what we stand for.

That is, it was time to find a way to convey how our service can be used to improve our customers' lives by making it easy for any of them—from the lone developer to the corporate IT team—to connect and operate their domains.

Falling in love with Workflows

This realization came a while back, but we were able to finally take action on it when Drip's Workflows literally landed on my lap two weeks ago. *Thanks Rob for the early access!*

I'll keep the lovefest short: it took me 2 seconds to totally get it. I kid you not, playing around with the Workflows interface put me in a weird state of euphoria—I was like Bradley Cooper in *Limitless*: seeing all the possible combinations of amazing Workflows I could create. So, I grabbed a glass of wine and got to work.

Right off the bat, I was able to harness Workflows to tackle three main tasks:

1. Make it easy to segment customers based on their behaviour.
2. Learn more about what their behaviours are in the first place and what we might be missing.
3. Automate anything and everything in-between.

Mise en garde: Anthony—our founder and in-house DJ—spent a generous amount of time integrating with Drip to make sure that we pass along all the relevant data via the API. You can definitely go a long way without it, but the more data you have for each customer, the better it gets.

Onboarding done right: One bucket at a time

All right, let's dive into what makes Workflows a true game changer for us:

Like many SaaS companies, we offer tiered pricing with plans ranging from $5 to $250 per month. With such a wide spectrum covered, we inevitably provide services to both solo developers hacking their first projects and large public companies.

To add to the complexity, our customers come with different skills levels—some of the best developers out there swear by us and, at the same time, non-technical people enjoy the simplicity of our service.

And like most SaaS companies, we're facing the following dilemma: "appeal to few, and lose the rest" or "appeal to all, and lose our personality." So, how can we ring true to the witty

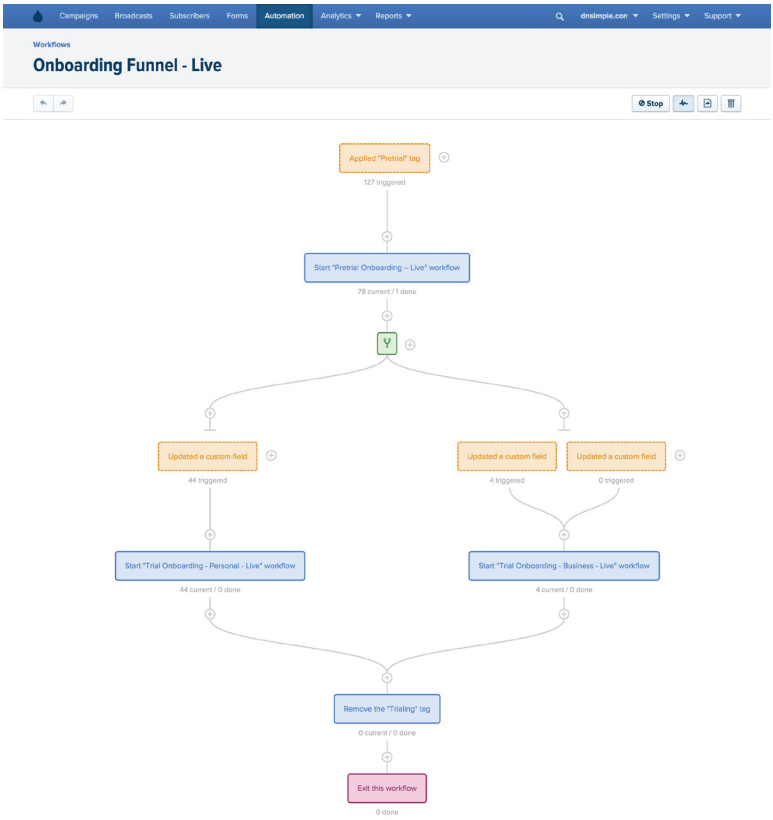
developer without alienating the more formal blue chip CTO?

The answer: Use Workflows to segment our customer base to provide each subset with the right message and the appropriate tone at the right time.

"Easy peasy!" you say? Well, actually, you're right! It is! All we had to do was to start by crafting the right segments and go on from there.

We opted to keep it simple and to go one bucket at a time with the goal to one day have many smaller buckets targeting specific subsets of our customer base.

First, we created two main buckets: one that includes all companies and on the other, the solopreneurs, designers, artists, developers, and freelancers—they are segmented based on the plan they select.



That way we can tailor two very different onboarding experiences by using a different tone for each subset.

Now, there's a small caveat with that approach: we still send toned-down emails to eclectic agencies who are on our higher tiers.

The friendly email sent to individuals.

Subject: Let the journey begin!

Welcome on board!

This marks the first day into the journey of your 30-day free trial with us.

In the next couple weeks we're going to push our hidden agenda on you: we'll make you love DNS!

We're stoked to have you on board with us and really hope DNSimple will work out for you, so don't hesitate to reach out if there's anything we can do to help.

Cheers,

- Anthony & the DNSimple Team

The more formal email sent to businesses.

Subject: Starting your 30-day free trial

Hey there,

This marks the first day into the journey of your 30-day free trial with us.

As you use the next couple of days to set up your domains, we'll make sure to make ourselves available should you need any assistance along the way. If that's the case, simply reply to this email.

Thanks for your business and welcome to DNSimple!

Sincerely,

- Anthony & the DNSimple Team

Ideally, we'd be able to identify them and hit them with our best shot. Thankfully, Workflows might also be the solution to this issue.

Passive Workflows to monitor behaviours

Indeed, with a little bit of creativity, you can make huge improvements to your Workflows by passively monitoring customer behaviours to confirm certain theories or discover aspects you never imagined.

Going back to fine-tuning our two buckets: we've set up a Workflow that identifies—to the best of our knowledge—agencies and monitors their behaviour over time in the hopes to learn more about their habits and find ways to identify them early in their journey with us.

Here's another example: I wanted to better grasp the pace at which new customers navigate their way to ultimately becoming customers.

Based on a hunch, the team's theory has always been that the speed at which a customer goes through the flow will have a direct correlation with their likelihood to convert (i.e., the faster they have an active account with a registered domain, the higher the chance they'll be around and happy a year from now.) Incidentally, customers lagging behind would be at risk or might require a little push.

So the question is "how fast?"

As shown in the screenshot below, by replacing actions with delays, we're now able to visually record the number of customers who pass in each branch with the hopes of fine-tuning the timing of our emails in other Workflows.

With the right Workflow and a little bit of time, we'll be able to collect enough cues to figure out the ideal pace.

What's next?

MOAR WORKFLOWS! Seriously, though, there is really no limit to how much can be done with Workflows.

Personally, I'm definitely looking to a few more booze-fuelled evenings tweaking Workflows based on other Workflows themselves inspired by monitoring Workflows.