



MARKETING

Automations

Multi-step email sequences triggered by an event. Welcome series, lead nurture, re-engagement, anniversary, post-trip follow-ups.

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Automations are multi-step email sequences triggered by an event. Unlike campaigns (one-time sends), automations run **forever** — every new contact that hits the trigger enters the sequence and walks through the steps over time.

When to Use an Automation

- **Welcome series** — a new subscriber gets a 3-email introduction over 7 days
- **Lead nurture** — a prospect who downloaded a guide gets education emails before a sales pitch
- **Anniversary / birthday** — automatic message on a date-based trigger
- **Post-trip follow-up** — N days after the contact's trip ends, send a review request
- **Re-engagement** — contacts who haven't opened in 90 days get a "we miss you" sequence

Triggers

Every automation starts with one trigger. The trigger determines when a contact enters the sequence:

- **Audience added** — contact added to a specific audience
- **Tag applied** — a specific tag is applied to the contact
- **Form submitted** — a specific form was submitted
- **Date matched** — based on a contact custom-field date (anniversary, birthday)
- **Webhook** — external event from another system (Trips, Books, etc.)

Steps

After the trigger, you build the sequence as a chain of steps. Each step is one of:

- **Send email** — send a specific email to the contact
- **Wait** — pause for N hours/days/weeks before the next step
- **Condition** — branch the sequence based on contact data ("if tag = vip → go to step A, else → step B")

- **Apply tag / add to audience** — modify the contact mid-flow
- **End** — exit the sequence (optional; sequences end automatically after the last step)

Re-enrollment

By default, a contact enters an automation **once**. If you want a contact to re-enter (e.g. they unsubscribed, re-subscribed, and should get the welcome series again), enable **Allow re-enrollment** in the automation settings. Without it, contacts who already entered the sequence are skipped on subsequent triggers.

Testing an Automation Before You Activate

1. Build the entire sequence and save as draft.
2. On the automation summary screen, click **Preview as contact** and pick yourself.
3. Marketing shows the full path through the sequence — every email, every wait, every condition branch — based on your contact data.
4. When satisfied, click **Activate** to start enrolling matching contacts.

ADVISOR TIP

Once active, an automation enrolls every matching contact immediately. Double-check your trigger — accidentally pointing it at a large audience can result in unintended sends to many contacts. We learned this the hard way; you should not have to.

Pausing & Editing Active Automations

You can **pause** an active automation any time — new contacts stop entering, but contacts already in the sequence continue through their remaining steps (they don't get stuck). Resume the automation to re-enable enrollment.

Editing an automation while active is supported, but with caveats:

- Changes to email content apply to anyone who hasn't yet received that step
- Changes to wait durations apply only to new entries (contacts already waiting use the old duration)
- Removing a step shifts everyone past that point forward in the queue
- Adding a step in the middle means contacts past that point will skip the new step

ADVISOR TIP

For major structural changes, it's often safer to pause the old automation and create a new one with the new design, then activate the new one once the old one's in-flight contacts have finished.