



EMAIL AUTOMATION

A STEP-BY-STEP GUIDE FOR
THE LOCAL CHURCH

EMAIL AUTOMATION

About the Author



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Learn more at www.prochurch.com

What is it?

What is email automation? It's just what you would think – email that gets sent automatically, typically when a user completes a certain action such as submitting their email address through a form on a website. A similar term is “autoresponder”. This refers to a single email that gets sent automatically in response to a user’s action. In a nutshell, email automation is a series of emails that get sent to someone automatically over a period of time.

Why use it?

With social media usage at an all time high, it’s tempting to think of engaging people through email as being “old school” and outdated. Not true. Studies show 72% people prefer to receive promotional content through email, compared to 17% who prefer social media. Overall, email is still the best digital medium to engage your audience and compel them to action.

The power of email automation is that once you invest the time to set it up, it will run automatically for you. You can set it and forget it (if you choose), but it is best to continually monitor the statistics of your emails and try different strategies to see if you can increase open rates and click rates.

How to set it up

There are many email marketing tools offering email automation, but we’ve chosen MailerLite as the overall best option for churches because it is simple and cost effective. Let’s look at how to set up an email automation with MailerLite.



EMAIL AUTOMATION

1. CREATE AN ACCOUNT (FOR FREE)

Head over to MailerLite.com and click "Sign Up Free". Enter your organization name, email, and choose a password. That's it, you're in!

2. COMPLETE YOUR PROFILE

Before you can actually send email, there are a few steps you need to take that will authenticate you as a legitimate organization. With all the spammers and scammers out there, these steps are necessary to prove your legitimacy. The first is to complete your profile. Just click "Complete your profile" and fill out the information about your organization.

Welcome to MailerLite!

Please complete the steps below to get your account approved.

- Complete your profile
- Verify your website domain

3. VERIFY YOUR WEBSITE DOMAIN

You need to verify that you have access to an email address that uses your website domain. Click "Verify your website domain".

Welcome to MailerLite!

Please complete the steps below to get your account approved.

- Complete your profile
- Verify your website domain

You need to enter your organization's website domain.

Your Website
Your website is a very important part of the account approval process. It will help us to know more about you and your business.

Website URL

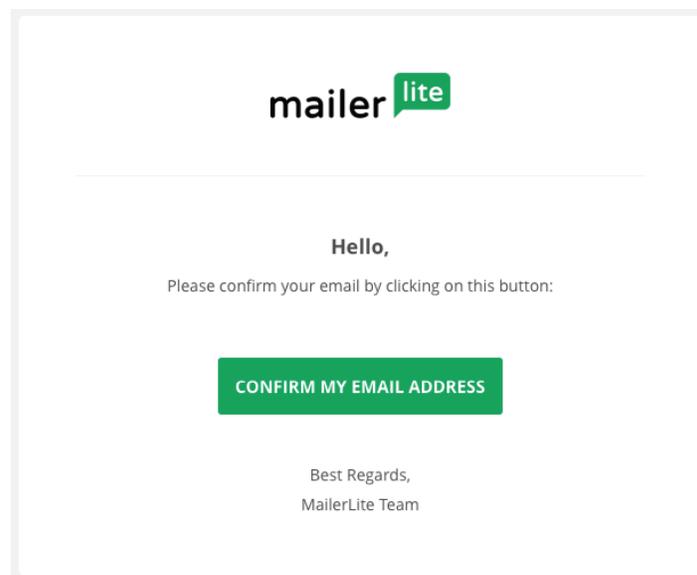
Then you need to enter an email address you have access to that uses your website domain.

Verify your domain ownership
We need to verify that you have access to an email address at your website domain. Enter an address, and we'll send you a verification email.

Email

 @prochurch.com

Once you do that, MailerLite will send a confirmation email to the email address you entered. Just open the email and click the "Confirm my email address" button to verify your domain.





EMAIL AUTOMATION

MailerLite will now review your account and contact you within one business day to complete the verification process. You will still be able to use your account and set up emails, you just won't be able to send any until your account is fully verified.

Wesley, thank you for completing the steps to get your account approved.

Your account is currently being reviewed. MailerLite Account Manager will contact you within one business day. Until then, you can prepare your future campaigns and explore other features.

- ✓ Complete your profile
- ✓ Verify your website domain

4. CREATE A NEW AUTORESPONDER

Let's build the first email in your automation. Click "Automation" in the top menu bar, then click "Create new autoresponder".

Dashboard Campaigns Subscribers Webforms Automation Upgrade Help ProChurch

Automation [Create new autoresponder](#)

Autoresponders cannot be activated if your account is not approved. [Click here to check your approval status.](#)

Create your first Autoresponder

Build and schedule automated emails like welcome messages, reminders, birthday greetings, and other date-based campaigns. Send single emails or a sequence over time.

5. CHOOSE AUTORESPONDER TYPE

There are 3 types of autoresponders, but for most purposes, you'll just want to use the first one – “When a new subscriber joins this list”.

Dashboard Campaigns Subscribers Webforms Automation

Choose Autoresponder Type

- When a new subscriber joins this list**
Send a Welcome Email or a Thank You Email to the new subscribers when they join your subscriber list.
- The anniversary of a date**
(you need to have date field in your subscriber list)
Perfect for special annual events like a birthday or wedding anniversary. We ignore the year value and send this annually. Just set it and forget it.
- The exact match of a date**
(you need to have date field in your subscriber list)
Ideal for one-off emails that need to be sent based on a specific subscriber's date, like a reminder for membership renewal or a post purchase follow-up.

NEXT or [Go back](#)

6. AUTORESPONDER RULE AND SUBJECT

Now set the rule for when the email will be sent. For the first email in the automation, you want it to be sent immediately after registration. Next, you need to specify the subject line of the email, and then who the sender of the email will be.

Autoresponder Rule and Subject Rule > Content

Send this email

after registration

Send this email every time subscriber joins the list, even if he was on the list before.

Subject

This text will be displayed in the 'Subject' field in your recipient's email client.

[Insert personalization](#)

Who is it from?

This will be displayed in the 'From' field of your recipient's email client. We recommend using your own email and name. Don't use emails like 'no-reply@company.com'.

Language

The language you choose will be used in your unsubscribe page.

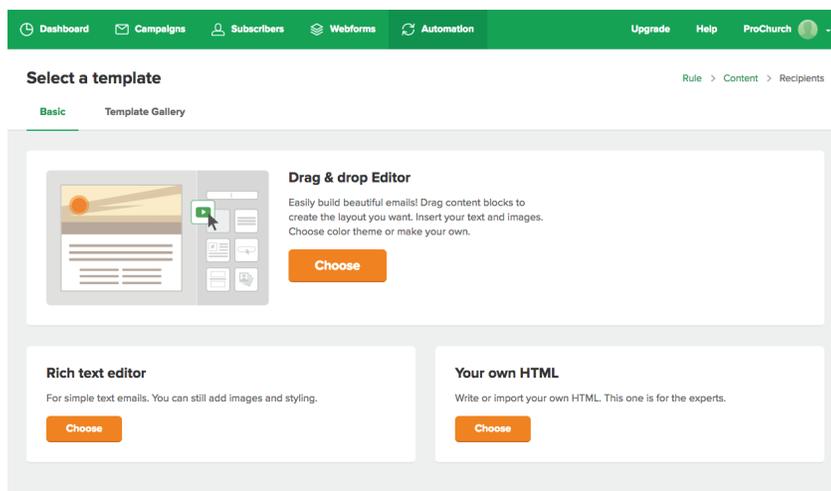
NEXT or [Go back](#)



EMAIL AUTOMATION

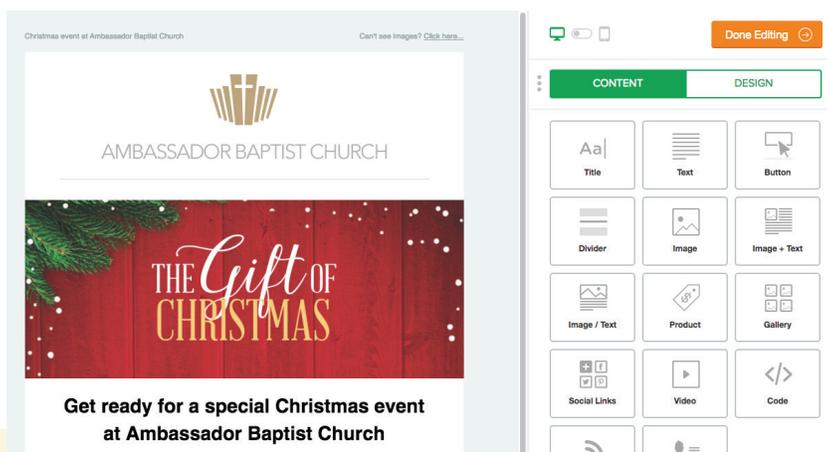
7. SELECT A TEMPLATE

The next step is to select a template for your email. You can start with a blank canvas or choose a pre-done layout from the template gallery. Our suggestion is to use the “Drag & drop Editor” option and just start with an empty layout.



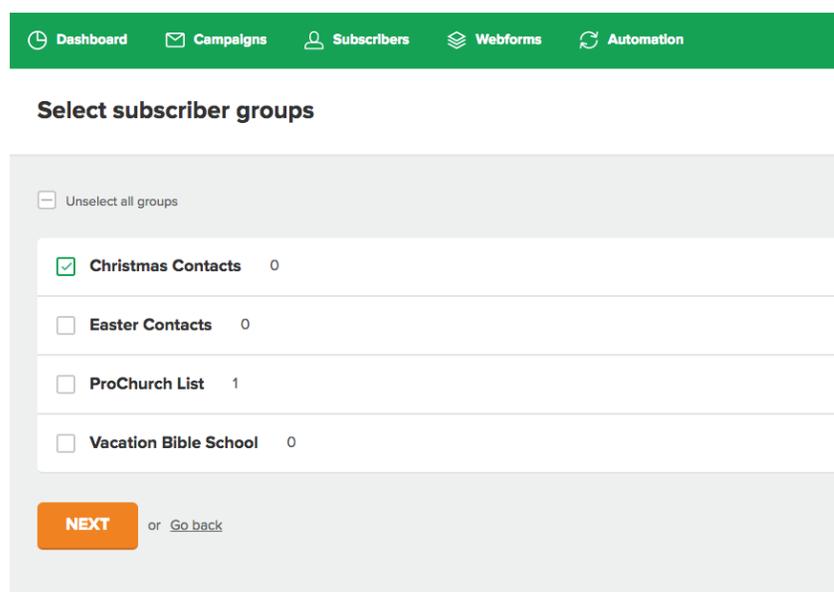
8. CREATE YOUR FIRST EMAIL

Now you will create the content of the first email in the automation. Drag content types from the right onto your blank email canvas on the left. Keep in mind that this will be the first email that they receive immediately after subscribing to your email list.



9. SELECT SUBSCRIBER GROUPS

Now you need to choose the subscriber group(s) that will receive this email. You can create a new group, or just use the default group that was created for you when you set up your account.



The screenshot shows a dashboard with a green navigation bar at the top containing icons and labels for 'Dashboard', 'Campaigns', 'Subscribers', 'Webforms', and 'Automation'. Below the navigation bar is a white header area with the title 'Select subscriber groups'. Underneath is a light gray box containing a list of subscriber groups. At the top of this box is a link 'Unselect all groups' with a minus icon. The list includes four items: 'Christmas Contacts' (checked, 0), 'Easter Contacts' (unchecked, 0), 'ProChurch List' (unchecked, 1), and 'Vacation Bible School' (unchecked, 0). At the bottom of the box is an orange 'NEXT' button followed by the text 'or [Go back](#)'.

Subscriber Group	Count
<input checked="" type="checkbox"/> Christmas Contacts	0
<input type="checkbox"/> Easter Contacts	0
<input type="checkbox"/> ProChurch List	1
<input type="checkbox"/> Vacation Bible School	0

10. CREATE ADDITIONAL AUTORESPONDERS

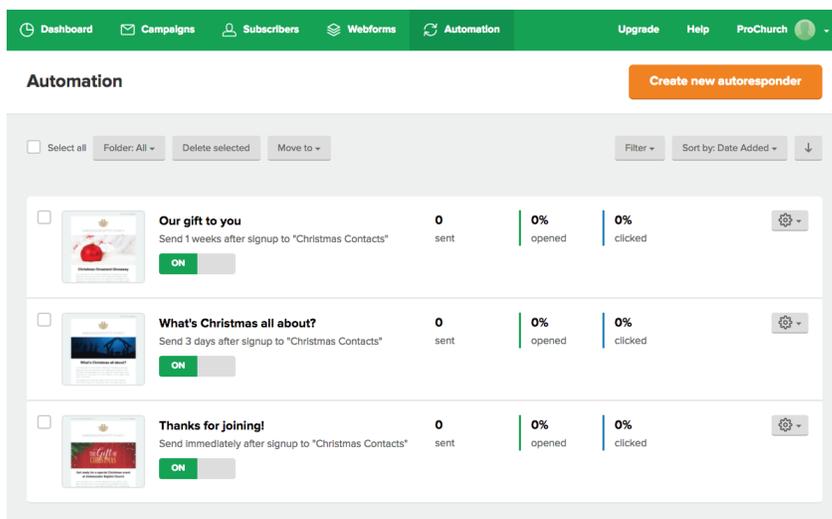
The initial “welcome” email that gets sent immediately after someone joins is great, but don’t stop there. To really make the most of email automation, you should set up multiple emails that get sent over a period of time. To create more emails, just repeat steps 4-9. Make sure you set up the email “rules” so that there is time in between each email. You don’t want all of the emails to be sent immediately, as that would defeat the purpose of the automation and quickly overwhelm your subscribers!



EMAIL AUTOMATION

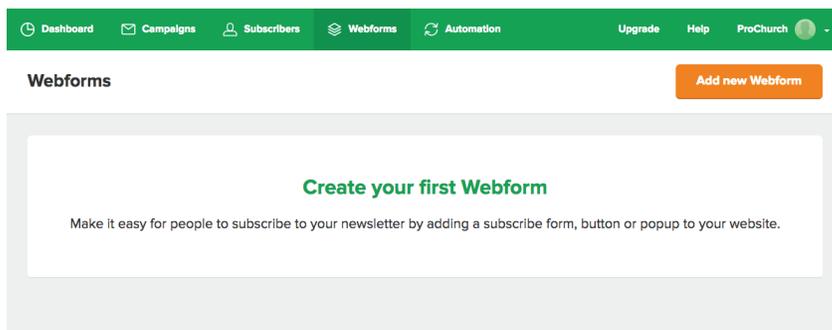
11. TURN ON YOUR AUTORESPONDER EMAILS

By default, your autoresponder emails will be turned off, so as to prevent you from accidentally sending out emails that you didn't want to be sent yet. To activate an autoresponder, go to the "Automation" page and switch each email "ON".



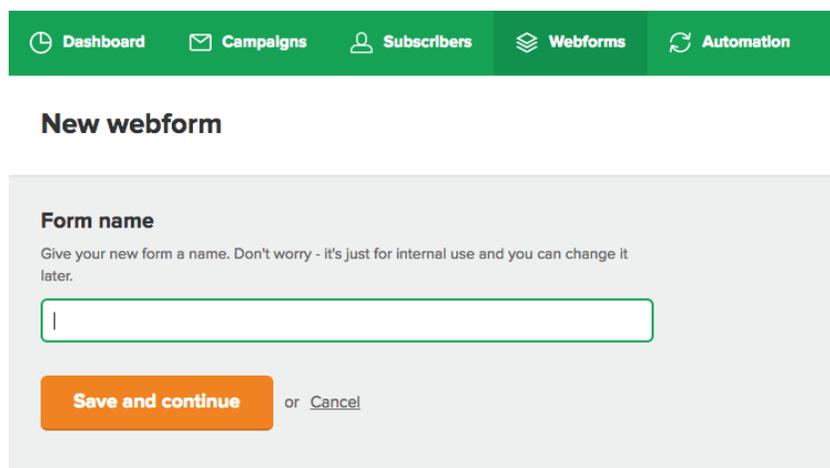
12. CREATE A NEW WEB FORM

You need to have a way for people to subscribe to receive your emails. You do this by creating a webform. Click "Webforms" in the top menu bar, then click "Add new Webform".



13. NAME YOUR NEW WEBFORM

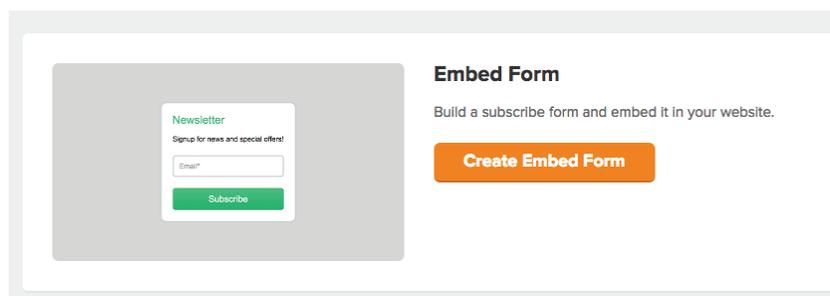
Choose a name for your webform. It's best to match it with your subscriber group name so that you can easily identify which subscriber group the webform is connected to.



The screenshot shows a dashboard with a green navigation bar containing icons and labels for Dashboard, Campaigns, Subscribers, Webforms, and Automation. Below the navigation bar, the page title is "New webform". Underneath, there is a section titled "Form name" with a sub-instruction: "Give your new form a name. Don't worry - it's just for internal use and you can change it later." Below this instruction is a text input field with a vertical cursor. At the bottom of the form, there is an orange button labeled "Save and continue" followed by the text "or [Cancel](#)".

14. CHOOSE WEBFORM TYPE

There are several methods you can use to collect email addresses from your website visitors, but the most common one is a simple embed form that you place somewhere on a web page. Let's click "Create Embed Form".



The screenshot shows a preview of an embed form on the left, which is a white box with a green header "Newsletter" and the text "Signup for news and special offers!". Below the text is an "Email" input field and a green "Subscribe" button. To the right of the preview, the heading "Embed Form" is followed by the instruction "Build a subscribe form and embed it in your website." Below this text is an orange button labeled "Create Embed Form".



EMAIL AUTOMATION

15. SELECT SUBSCRIBER GROUPS

Next, choose a subscriber group (or groups) that a user's email address will be added to once they submit the webform.

Dashboard Campaigns Subscribers Webforms Automation

Select subscriber groups

Unselect all groups

<input checked="" type="checkbox"/>	Christmas Contacts	0
<input type="checkbox"/>	Easter Contacts	0
<input type="checkbox"/>	ProChurch List	1
<input type="checkbox"/>	Vacation Bible School	0

Save and continue or [Cancel](#)

16. MODIFY YOUR WEBFORM

Now you have the opportunity to customize your webform. Change the fields, text, and design of your webform to your liking.

Details Design Fields Groups

TITLE

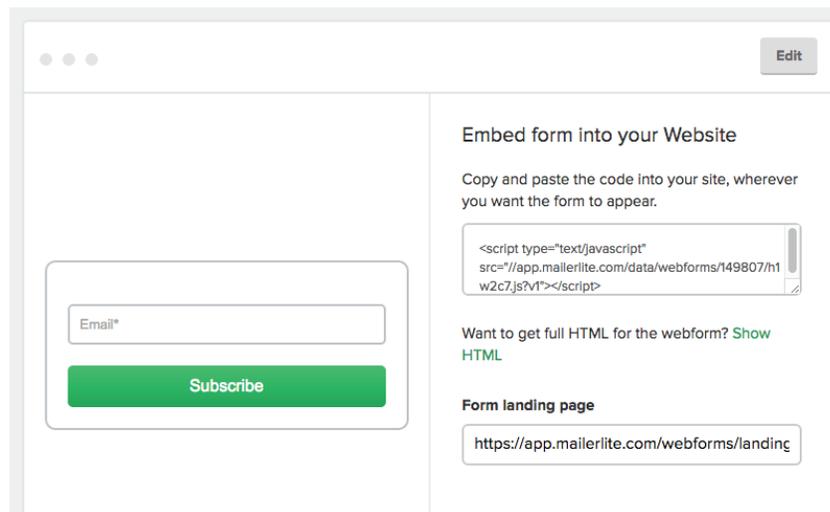
RSVP for this event

TEXT

B *I* U ~~ABC~~ **A** **T** **φ** **≡** **≡**

17. EMBED THE FORM INTO YOUR WEBSITE

You need to embed this webform on a web page so that people can subscribe to receive your emails. Just copy and paste the embed code into your site, wherever you want the form to appear.



The screenshot shows the MailerLite webform editor interface. On the left, there is a preview of the webform, which consists of a white input field labeled "Email*" and a green "Subscribe" button below it. On the right, there is a section titled "Embed form into your Website" with the instruction "Copy and paste the code into your site, wherever you want the form to appear." Below this instruction is a text area containing the following JavaScript code:

```
<script type="text/javascript" src="//app.mailerlite.com/data/webforms/149807/h1w2c7.js?v1"></script>
```

 Below the code is a link that says "Want to get full HTML for the webform? Show HTML". At the bottom right, there is a section titled "Form landing page" with a text field containing the URL <https://app.mailerlite.com/webforms/landing>. An "Edit" button is visible in the top right corner of the editor.

Here is an example of a webform embedded on an event webpage.



The image shows a webpage for "AMBASSADOR BAPTIST CHURCH" with a red wooden background and Christmas decorations. The main heading is "THE Gift OF CHRISTMAS" in white and gold script and serif fonts. Below the heading, it says "A CHRISTMAS EVENT • 12.25.16". On the right side, there is an embedded webform titled "RSVP for this event" with three input fields for "First Name", "Last Name", and "Email*", and a green "I'm Coming!" button. A white checkmark icon is visible at the bottom center of the page.



EMAIL AUTOMATION

THAT'S IT, YOU'RE DONE!

Congrats! If you followed each step in this guide, then you successfully set up an email automation in MailerLite. To get the most out of an email automation, it is best to monitor the statistics of your emails to see how many of them get opened, and how often people are clicking on the links in your emails. Test out different subject lines and email content to see what gets the highest rate of engagement from your subscribers.