How to Create 3 Must-Have Ecommerce Email Campaigns

How to Identify Which Ecommerce Email Campaign is Best for You

Here are the reasons to employ each nurturing email campaign:

- Abandoned-cart Campaign: Visitors are finding your online store and adding products to their shopping cart but aren't completing their purchase.
- New Customer Campaign: Customers are making an initial purchase but aren't making repurchases.
- Replenishment Campaign: Customers are making an initial purchase of a product or service with a finite lifespan, but they aren't returning to you to make a repurchase.

How to Set Up Your Shopify + HubSpot Integration

1. In your HubSpot account, click your account name in the top right corner, then click Integrations.
2. In the upper right, click Connect an app.
3. Use the search bar to search for the Shopify integration. Hover over it and click View integration.
4. In the dialog box, enter your Store's Shopify URL and click Connect to Shopify.
5. In the pop-up window, enter your Shopify credentials and click Log in.

You'll return to HubSpot and see a dialog box indicating your Shopify store has been connected to HubSpot. Once you integrate HubSpot and Shopify, the connector will automatically add your HubSpot tracking code to all of your Shopify store pages. Check the progress of the import or modify your sync settings by clicking Go to ecommerce settings.

Once your first store is connected, you can connect additional Shopify stores from the Shopify integration page. In the upper right, click the dropdown menu and select + Connect another store. To switch between stores, use the dropdown menu in the upper right.

Abandoned Cart Email Campaigns

Overview

Target: Website visitors who didn't complete their online purchase
Goal: Re-engage and convert them into customers
How: Nudge them with automated email reminders about their forgotten purchase

How to Create an Abandon Cart Email Campaign in HubSpot

Step 1: Write and create your reminder emails
Step 2: Set up your abandoned cart workflow
Step 3: Test your workflow
Step 4: Turn Workflow on and monitor

Step 1: Write and create your reminder emails

The key elements to include in each reminder email are:
- The abandoned item displayed as part of the message and subject line
- Product images
- A backlink directed to the abandoned-cart checkout URL

Optional: If an email recipient fails to act on the first few abandoned-cart emails, including a discount or free shipping in latter emails can entice them to follow through with the purchase.

To create your emails in HubSpot:

1. Navigate to Marketing > Email. In the upper-right corner, click Create email> automated email.
2. Use Search bar and type in "abandoned cart" to find the templates for this campaign. You can see there are 3 templates - one for each reminder email in the series.
3. Select the template for email 1 and give it a name - "Abandoned Cart Email 1".
4. Now we can make a few changes to this email - like swapping out the logo for our own and updating the default copy to fit our brand. If you want to make changes to colors, cta style or font - that will have to be done at the template level. You will also notice that you cannot make any changes to the cart summary module. The products you see are placeholders and will automatically populate with the items from your store that the recipient left in the cart.
   a. If you do make any changes to the copy be sure to update the plain text version by clicking the "reset from HTML" button.
5. Edit the sender, subject line (i.e., "you left something in your cart") and preview text.

6. Settings tab: ensure you have selected the correct subscription type.
7. Recipients tab: email is already set to be saved for automation, but be sure to uncheck the "don't send to unengaged contacts"
8. Review tab: assure nothing is missing and then click "save"

Repeat this process to create email 2 and 3 using the Vast ecommerce abandoned cart templates. Be sure to add your coupon code or discount to email 3 if you choose to employ this tactic.

Step 2: Build Email Workflow

Once you have your emails created you can create your workflow.
Lucky for you HubSpot has a workflow template that you can use to get started.

Please note: You cannot modify enrollment triggers in the default ecommerce workflows. To use an ecommerce workflow with different triggers, you need to clone the workflow.

1. Navigate to Settings > Select Integrations from the left hand panel > Ecommerce > Scroll down the page to the section Automation
2. Click on "Create Workflow" for the center option "Abandoned Cart Workflow"
3. To open the workflow in the workflow editor, you must add the first workflow action. Select Add Delay: 1 day. Then click on button "Click here to review and turn on."
4. This will open up a deal-based workflow inside the workflow editor.
5. Your enrollment triggers have already been set:
   a. Ecommerce deal is "True";
   b. Source store is any of "Your default store";
   c. and Deal Stage is Checkout Abandoned (Ecommerce pipeline - automatically created when you integrated Shopify with HubSpot)
6. Add your actions:
   a. Add Delay: HubSpot suggests the next action be a 1 day delay, but this is something I believe you should test and tweak overtime. For some audiences, a 1 hour delay might be best.
   b. Send external email: Abandoned cart email 1
   c. Add delay: 1 day (again you should test this)
   d. Send external email: Abandoned cart email 2
   e. Delay: 2 days
   f. Send external email: Abandoned cart email 3
7. Settings
   a. Suppressions: You can think of this as a goal you want deals in your workflow to meet. Once they meet this goal, they'll be unenrolled.
      i. **Deal stage** is any of **Checkout Completed (Ecommerce Pipeline)**

      ii.   Timing: Leave default as executing any time unless you are a B2B company in which you may want to set only on weekdays.

Step 3: Test your workflow

Enroll a test deal in your workflow

1. Find a deal in your ecommerce pipeline that is in the deal stage: abandoned cart
2. Return to workflow editor, In the upper right, click Test.
3. In the dialog box, select a deal to enroll in the workflow.
4. Click Test.
5. You will see if your deal was successfully enrolled and if all of your actions would be executed for the associated contact.

Step 4: Turn Workflow On

But keep a close eye on it in the early days.

New Customer Campaign

Overview

In addition to the post-purchase emails sent to new customers, a separate New Customer Welcome campaign is key in turning a one-time purchaser into a loyal customer.

Target: First-time purchasers
Goal: Turn first-time purchasers into repeat customers
How: Cultivate pattern of engagement by showing what your store, product, and brand are about

How to Create a New Customer Campaign in HubSpot

Step 1: Write and create your reminder emails
Step 2: Set up your abandoned cart workflow
Step 3: Test your workflow
Step 4: Turn workflow on

Step 1: Write and create your emails

We suggest including 4 to 6 emails in this campaign. In terms of content, possible things to include are:

- Your brand's origin story

- Your social media accounts to engage and follow
- Customer loyalty programs they can enroll in
- An incentive on their next order
- An invitation to modify their customer profile or preferences
- Helpful product or lifestyle-related resources
- Product review request
- Cross/Up-sell

Email 1: Confirmation Email

Sent one day after purchase.
Make this email short and sweet by confirming that their customer account has been successfully opened and providing some ways to get in touch. You could also invite the recipient to engage with your brand on social media.

Email 2: Brand Story

Sent one week after purchase.
Your first email was to the point with a quick introduction. In your second email, you can take some time to provide background on your company, highlight your unique value proposition, and officially welcome new customers to your family or whatever affectionate term you use to describe your group of customers.

You really want to develop a distinct personality for your brand that will be readily identifiable to your customers as you are establishing the specific tone you'll be using in all future communications.

Email 3: Helpful Product or Lifestyle-related Resources

Sent two weeks after purchase.
In this email you are establishing yourself as not just a seller, but a trusted advisor and source of information. You can include links to educational content like blog posts and instructional videos to help them get the best use out of your products, as well as industry news articles and resources to keep them up to date on the latest industry developments. Establishing yourself as a trusted source makes it much more likely that they will take your product recommendations seriously in the future.

Email 4: Incentive

Sent one month after purchase.
Now that you have established a strong pattern of engagement with your new customer, you can take the opportunity to encourage them to make their next purchase with an incentive.

Creating Emails in HubSpot

There are Vast ecommerce email templates labeled Welcome emails, but honestly you can use any basic email template you are currently using for your brand for these.

Step 2: Build email workflow

1. Navigate to Workflows > Create Workflow
2. Contact based > Start from scratch
3. Set Enrollment triggers
   a. **Ecommerce contact** is any of **True**
   b. **AND**
   c. **Source Store** is any of **{name of your store}**
   d. **AND**
   e. **Lifecycle stage** is any of **Customer**
   f. **AND**
   g. **Workflow status** has completed **Post-purchase workflow** *(optional depending on the nature and timing of your post-purchase series)*
   h. Do not allow re-enrollment - we only want first-time buyers to receive this series
4. Goal: Not needed, want all those who enroll to complete the workflow
5. Settings
   a. Leave defaults
6. Actions
   a. Set Delay - 1 days
   b. Send external email - Welcome Email 1 (Confirmation email)
   a. Set Delay - 7 days
   b. Send external email - Welcome Email 2 (Brand Story)
   c. Set Delay - 7 days
   d. Send external email - Welcome Email 3 (Resources)
   e. Set Delay - 7 days
   f. Send external email - Welcome Email 4 (Incentive email)

Step 3: Test workflow

1. Find a contact in your system who you believe meets the enrollment criteria
2. In the upper right, click Test.
3. In the dialog box, select your contact from dropdown menu and click test.
4. You will see if your contact was successfully enrolled and if all of your actions would be executed for this contact.

Step 4: Turn workflow on

But keep a close eye on it in the early days!

Replenishment Campaign

Your most qualified audience for purchasing one of your products are those who purchased it in the past. So, if you have any products with a finite life span then a replenishment campaign is a smart investment because it targets those that are most likely to buy from you again.

Target: Customers who purchase a product with a finite lifespan
Goal: Turn first-time purchasers into habitual buyers
How: Provide a timely reminder that makes it easier and faster to buy from you than a competitor

How to Create a Replenishment Campaign in HubSpot

Step 1: Write and Create Reminder Emails
Step 2: Create customer lists
Step 3: Build your workflow
Step 4: Test your workflow
Step 5: Turn workflow on

Step 1: Write and Create Reminder Emails

Create 2 reminder emails.

Key elements to include in each are:
- The item displayed in message and subject line
  - Subject line: "We see that your [Product] is almost out! Would you like to reorder?"
  - Message: "Hello [Contact.First.Name]! As a valued customer of ours, we would love to remind you about your past purchase of [Product]. We figured you're about to run out. Is that right? If so, we more than welcome you to visit our online store to repurchase [Product].
- Product image
- Backlink directed to product page
- *Optional: discount or free shipping*

Note: Rather than creating new emails for every single replenishable product, you could use smart content within one email to populate these key elements differentially for each product customer list you create in the next step.

Step 2: Create Customer Lists

Product Customer List

1. In your HubSpot account, navigate to Contacts > Lists.
2. In the upper right, click **New list**.
3. In the left panel, select **Line item properties** and search for and select the **Name** property.
4. Select is **equal to any of or contains any of**, then enter your **product name** (as it appears in Shopify and HubSpot) in the field and click **Create option**.
5. Name your list and be sure to include exact line item name and Replenishment (i.e., Hair Gel Replenishment Customers)
6. Click Done.

Last Purchase List

1. In your HubSpot account, navigate to Contacts > Lists.
2. In the upper right, click **New list**.
3. In the left panel, select **Contact Property**. Search and select **Recent Deal Close Date**
4. Select **is more than** and enter ½ the lifespan of your product in days.
5. Name your list (i.e., Contact Last Purchase 30 Days)
6. Click Done.

Step 3: Build Workflow

1. Navigate to Workflows > Create Workflow
2. Contact based > Start from scratch
3. Set enrollment triggers
   a. **Ecommerce contact** is any of **True**
   b. **AND**
   c. **Source Store** is any of **{name of your store}**
   d. **AND**
   e. **List Membership** is member of **{your Product Customer List}**
   f. **AND**
   g. **List Membership** is member of **{your Last Purchase List}**
   h. Re-enrollment - Allow re-enrollment when **List membership** is member of **{your Product Customer List} and {your Last Purchase List}**
4. Goal: Deal Property > **Deal Stage** is any of **Checkout Completed (Ecommerce Pipeline)**

5. Settings
    a. Unenrollment and Suppressions
        i. Under "When a contact no longer meets the enrollment conditions, remove them from this workflow?" select: "Yes, remove them from this workflow"
6. Actions
    a. Send reminder email 1
    b. Set Delay - {duration determinate upon the lifespan of your product}
    c. Send reminder email 2

Step 3: Test workflow

1. Find a contact in your system who you believe meets the enrollment criteria
2. In the upper right, click Test.
3. In the dialog box, select your contact from dropdown menu and click test.
4. You will see if your contact was successfully enrolled and if all of your actions would be executed for this contact.

Step 4: Turn workflow on

But keep a close eye on it in the early days!

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