
Designing Effective Email Drip Campaigns

Now we shift our focus to email drip campaigns. These are **a series of emails sent automatically on a schedule or triggered by user actions**. In SaaS, drip campaigns are used in multiple scenarios: to nurture new leads - these are marketing drips, next to onboard trial users - these are called product drips. Then we can use them to re-engage inactive users, or to upsell features, and more.

So, designing an effective drip campaign requires **planning, good content, and the right timing.** Let's break it into steps.

Step 1: Define Your Campaign's Goal and Audience
Start with clarity on *who* you are emailing and *what* you want to achieve. Is this drip for someone who just signed up for a newsletter and we want to get them to start a free trial? Or are we emailing new free trial users with the goal to convert them to paid customers?

Let's take a concrete example. Our company offers a project management tool and someone just downloaded our eBook. That's a clear signal they're interested in project management solutions. We'll design a drip campaign to **engage this lead and ideally get them to sign up for our free trial.**

Step 2: Choose an Email Automation Platform
To run drip campaigns, you need a platform that can **send automated emails based on triggers or schedules.**

Popular choices are HubSpot, Marketo, Pardot, Mailchimp, Customer.io, etc. The platform should integrate with your CRM or user database to personalize and trigger based on events.

On the platform, you can set up the initial conditions. For instance, "When a contact is added with the tag "eBook download", enroll them in Campaign X." Or "When a user signs up for trial, start Trial Onboarding sequence." This is the technical foundation so that once you create the content, the system knows who to send to and when.

Step 3: Map Out the Email Sequence

The third step is mapping out the email sequence. We need to plan when each email will be sent, how many emails should be sent and how far apart. This depends on the context. During a one-month trial, an effective onboarding strategy could involve sending around five well-timed emails to guide users toward activation and conversion. However, it's essential to consider user engagement and preferences. Studies indicate that sending too many emails can lead to subscriber fatigue. For instance, one study found that **78% of consumers have unsubscribed from emails because a brand was sending too many emails.**

To optimize your email cadence keep an eye on click-through rate, and unsubscribe rates to gauge how your audience is responding.

Also don't spread so thin that the prospect forgets who you are between emails. Studies find that **Tuesday tends to be a high-engagement day for emails**. In fact, **27%** of marketers said Tuesday got the most engagement, followed by Monday and Thursday.
blog.hubspot.com

Now, not all leads are the same. Some might be new trial users clicking around your product for the first time, others might have signed up to download a whitepaper but haven't tried the product. We should do **segmentation of emails.** This means **dividing your email list into smaller groups based on criteria.**

Such t**argeted emails perform significantly better than generic blasts**. Industry stats are very compelling. Segmented email campaigns have, on average, **14% higher open rates** and **50% higher click-through rates** than non-segmented campaigns.
fluentcrm.com

This means more people are reading and engaging with your emails when those emails are tailored to their interests. Marketers have found a **760% increase in email revenue from segmented campaigns**.
fluentcrm.com

In other words, segmentation can dramatically boost the return on investment of your email marketing efforts. Most B2B buyers expect personalized communication. **80% of business buyers are more likely to buy from companies with personalized experiences**– and this

extends to the emails they receive during their buying journey.
leadforensics.com

Let's see what segmentation typically involves.

a) Life Cycle Stage Segmentation: Tailoring emails based on where a user is in their journey (lead, trial user, customer, etc.)
"Welcome to your trial —> here's how to get started and make the most of your first week."

First there is lifecycle stage segmentation. Identify whether someone is a *new lead*, *active trial user*, *inactive trial user*, *new customer*, *long-term customer*, etc. Each stage needs different messaging.

b) Behavioral Segmentation: Customizing emails based on actions users take (or don't take).
"You've visited our pricing page three times —> here's a quick guide to choosing the right plan."

Second, we can do behavioral segmentation. Use what you know about prospects' behavior. If a lead has clicked on the pricing page multiple times or if a trial user has used certain features heavily, tailor emails to that.

c) Demographic/Firmographic Segmentation: Adapting content based on user attributes like role, industry, or company size.
"As a CFO, you might find this ROI calculator helpful when evaluating project tools."

Next, we have demographic or firmographic segmentation. If your SaaS product serves different industries or roles, segment by those attributes. For instance, if you gleaned during sign-up that one user is a software developer and another is a CFO, you might send different content. The developer might get technical case studies or API integration tips, while the CFO gets content about cost savings. This is crucial because each role evaluates the product differently.

d) Engagement Level Segmentation: Sending different emails based on how active or inactive someone is with your product or emails.
"We noticed you haven't logged in recently —> here's a quick tip that might inspire your next session."

Also think about segmenting by how engaged someone is with your emails or product. Highly engaged leads who open emails, click, and log in frequently, might be treated as hot leads. You should perhaps fast-tracking them to a sales contact or sending more advanced content. Low-engagement leads might get a re-engagement campaign.

Outline each email's purpose

You should also create a narrative flow where each email builds on the previous. Let's take a look at the example of what it might look like.

- ***Email 1***

First, thank users for the action they took and introduce your company's value proposition. For instance, users downloaded an eBook, so Email 1 could deliver the promised content and briefly introduce how your SaaS product relates to it. Keep this fairly short and focused on delivering value, not selling hard. It sets the stage.

- ***Email 2***

In the second email, share additional **educational content** – maybe a blog post or a video related to the topic, to continue providing value. This keeps them engaged. You can highlight a common pain point and how your product addresses it. At the end, there could be a CTA button like "If you'd like to see how this could work for you, you can try our tool free for 14 days."

- **Email 3**:

If they still haven't converted, add a **final call or limited-time incentive**.

It's often good to include a "stay connected" note, like inviting them to follow your blog or socials if they haven't converted but want to keep getting value.

That's just one possible flow. The key is to mix *educational, useful content* with *product introduction*. **Early emails should provide more value. Later emails should be more conversion-focused.** Throughout, maintain a helpful tone, not a pushy sales tone.

Step 4: Write the Email Content

Now that you have the outline, it's time to craft each email. Here are some tips for writing.

a) subject lines = clear and enticing, avoid spammy phrases
b) tone = informative and professional, but still friendly and human
c) body content = 150-300 words, include images sparingly
d) providing value = each email should give something
e) visual layout = use responsive template

- ***Subject Lines**:*

Subject lines should be clear and enticing, to get the open. They can vary: some could be straightforward, others curiosity-driven, some personalized with a person's name. Avoid spammy all-caps or too salesy phrases. You can A/B test subject lines if your volume is high enough.

Remember, if they don't open, nothing else matters. Make sure subjects relate to the content inside and to what the user expects from you.

- ***Tone***:

The tone should be informative and professional, but still friendly and human. Drip emails often perform well when they feel like a personal note from a knowledgeable friend rather than a corporate brochure. Use the recipient's first name if possible.

- ***Body Content***:

Keep paragraphs short in the body of the email, as emails are often read quickly or on mobile. Use bullet points for lists and bold key statements or italics for emphasis if needed. Research shows that **44% of marketers create 2-3 versions of an email to target different segments**. And **about 18% create up to 4-6 versions**. A good marketing email might be 150-300 words. Onboarding or educational emails can be a bit longer if needed, but always cut the fluff. The reader should get the point quickly. If you have a lot to say, it's often better to say part of it and then link to a blog for full detail, so you also drive traffic to your site.
blog.hubspot.com

You can also include images sparingly, for example a small logo or product screenshot can help. However, be aware that too many images can trigger spam filters.

- ***Providing Value***:

As I already mentioned, each email should give something – a tip, a resource link, an insight. Even the more salesy emails should teach something or address concerns.

- ***Visual Layout***:

And finally, use a template that is responsive. Many drip emails favor a simple design that looks like a normal email. Highly designed newsletter-style emails with multiple columns can feel less personal. That said, they can still work depending on your audience. For a professional services vibe, a clean one-column with logo at top, then content, then a button, and a footer is great. Test how it looks on mobile. Also consider including an **email signature** from a team member.

Step 5: Implement Triggers to Remove or Transition Contacts.
As part of your setup, you want to ensure that **when someone takes the desired action, they don't continue to get irrelevant drip emails**. In your workflow, **set a trigger.** For example, if a user visit the sign-up confirmation page, then *unenroll them* from the campaign. This prevents the scenario where the user got an email asking to do something they already did. After removal, you might **move them to a different campaign.** For instance, after a user signs up, they get the *trial onboarding drip* email.

Likewise, if a lead clicks 'unsubscribe', set the system to automatically remove unengaged contacts to prevent spamming.

Step 6: Test the Emails and Automation.
Before letting it run, test everything.

- Send test emails to yourself and colleagues, check formatting on desktop and mobile, click the links to ensure they go to correct pages, check personalization fields populate correctly. Most tools have a way to test with dummy data or an actual contact.
- Then, check the unenrollment triggers by manually changing that contact's status to see if they get removed properly.
- Also, there is nothing worse than a wrong name usage like "Hi [FIRST_NAME]!" This looks very impersonal, so double-check those.
- And as you release new features or new content, you might want to update your drips. They shouldn't remain static for years.

Many successful SaaS attribute a large portion of their conversions to effective email sequences that nurture prospects over weeks or even months.

So we've covered how SaaS companies **Attract** visitors via social media and affiliate partnerships. Then we explored how they **Engage and convert** those visitors with optimized landing pages and well-crafted drip campaigns. The process is inherently iterative and data-driven – you launch strategies, measure results, and refine continuously.