

Creating an Automated Stream of Welcome Emails

Using formulas and workflows to welcome new subscribers

When someone new subscribes to receive your organization's emails do you have a way to welcome them – introducing them to your programs, easing them in, and perhaps finishing with a fundraising ask – or do they get stuck into the mass email pool with everyone else? Here's an easy way to use formulas and workflows to set up an automated stream of welcome emails, in order to send a series of introductory emails before your subscriber starts receiving everything else. The assumption is you'll want to send your emails on Tuesdays and Thursdays (during peak days for email receptivity) during the first month after sign up, which is the “sweet spot” for the person's interest in your organization.

Step 1: Create two fields on the Contact object

- Click on Setup > Customize > Contacts > Fields
- Add a field called *Email Subscription* of type Checkbox
- Add a field called *Email Subscription Begins* of type Date

Step 2: Create a workflow rule

- Click on Setup > Create > Workflow & Approvals > Workflow Rules
- Create a new rule on the Contact object called *Send Welcome Emails*
- Description: “Send a series of welcome emails when someone signs up for emails.”
- Under Rule Criteria, choose:
 - Run this rule if the following criteria are met
 - Field = *Contact: Email Subscription*
 - Operator = Equals
 - Value = True

Step 3: Create an Immediate Workflow Action that performs a field update

- Click Add Workflow Action and choose New Field Update.
- Name this Immediate Workflow Action *Set Email Subscription Begins*
 - Field to Update = Email Subscription Begins
- Under Specify New Field Value, select Use a formula to set the new value
- Click on the Show Formula Editor link
- Insert the following formula:

```
CASE ( MOD ( TODAY () - DATE ( 1900 , 1 , 7 ) , 7 ) ,
2 , TODAY () ,
3 , TODAY () + 6 ,
4 , TODAY () + 5 ,
5 , TODAY () + 4 ,
6 , TODAY () + 3 ,
0 , TODAY () + 2 ,
1 , TODAY () + 1 ,
TODAY () )
```

How does this formula work? January 1, 1900 was a Sunday, so the MOD function is applied to the difference between today's date and 1/7/1900, divided by 7. MOD tells us what the remainder is after dividing. The CASE function then tells Salesforce what to do for each possible remainder. If the

remainder is 2 we know today is a Tuesday, so we'll set the Email Subscription Begins field to today's date. If the remainder is 0 we know today is a Sunday, so we'll set the field to two days from today.

Step 4: Create a Time-Dependent Workflow Action to send the 1st email alert

- Click [Add Time Trigger](#).
- Choose [9 Hours After Contact: Email Subscription Date](#) (this will send it at 9:00 a.m. on the Tuesday after the person signs up).
- Click [Add Workflow Action](#) and choose [New Email](#).
- Description = "Send Series Email 01"
- Email Template = [select the appropriate email]
- Search = [Email Field](#)
- Then select *Email Field: Email* in the left-hand column and move it to the right-hand column.

Step 5: Add additional Time-Dependent Workflow Actions to send more emails

- For the next Thursday at 9:00 a.m. use 57 hours after Contact: Email Subscription Begins
- For a week after the first Tuesday at 9:00 a.m. use 177 hours, etc.
- Continue until you've added all your time-dependent actions. (Note that there is a limit of 10 actions per trigger and a total of 80 actions per workflow rule.)
- After you've finished adding time-dependent actions, make sure to click the [Activate](#) button to activate the rule, otherwise it won't work.

Step 6: Test to make sure it's working

- Create a new contact and check off the Email Subscription box. The Email Subscription Begins date should be automatically filled in for you after exiting from Edit mode.
- Check that the Workflow Actions from your rule have been placed in the queue. Go to Setup > Monitoring > Time-Based Workflow and click [Search](#). You should see the actions listed.

Additional considerations

The instructions above are a proof of concept. Clearly, you'll need to do more to make this work for your organization. Here are some points to consider for your own implementation:

- How does the Email Subscription box get checked? Is it done by a staff person, via a Web-to-Lead Form, or both?
- If your organization uses leads, then you'll need to implement the same solution above on the Lead object.
- Do you want subscribers to be excluded from receiving your organization's other emails (such as a monthly newsletter) until they've made it all the way through the automated welcome stream? If so, then you'll need to implement a way to exclude them. One way to do this would be to add a final time-dependent action that updates a field, such as an additional checkbox.
- You may want to set access permissions on the Email Subscription Begins field so that it can't be edited.
- What if the subscriber wants to opt out midway through the welcome stream? Is your Salesforce administrator able to remove them from the workflow queue quickly and easily?
- Have you set things up properly so that people won't receive a second series of welcome emails? One approach would be to add a final time-dependent action that updates a field, such as an additional checkbox, that indicates that they've already received the welcome stream. Then, add an additional criterion to your workflow rule so that it only fires if that checkbox is unchecked.