Nurturing + Automation Planning Worksheet

Segment Name

Segment Conditions
Which characteristics / behaviors are typical of this segment?

Segment Goal
What is the ultimate goal for this segment?

Email Steps
What kind of targeted content do you want to email to this segment?

Website Content
What targeted content or calls to action should this segment see on our website?

Monitoring
What website actions or social media terms do you want to monitor for this segment?