

# Customer Lifecycle Email Planning Worksheets

Ready to level up your SaaS email game? Let's get started! Print out these worksheets and fill them out in any order (it's best to revisit your properties and events after you plan campaigns). Please keep these worksheets as a reference for the implementation stage.

Product name

Product URL

Brief product description

Today's date

## Brainstorming Questions

Who is your target user (ideal customer)?

What primary goal does the user want to achieve using your product?

What are the steps on their way to success? Which of them require the most hand-holding?

1	
2	
3	
4	
5	
6	
7	
8	

What assistance and resources can you offer in your messages?

- |  |   |
|--|---|
| <input type="checkbox"/> Quick start guide           | <input type="checkbox"/> Free strategy / technical call |
| <input type="checkbox"/> Knowledge base articles     | <input type="checkbox"/> Concierge onboarding           |
| <input type="checkbox"/> Blog posts                  | <input type="checkbox"/> Extended trial                 |
| <input type="checkbox"/> Explainer videos / webinars | <input type="checkbox"/> Upgrade discount               |
| <input type="checkbox"/> Templates / worksheets      | <input type="checkbox"/> Annual billing discount        |

What features do you need to promote to your users after they become paying customers?

--

How can you deliver more value to customers after they've been with you for a while?

--



# Events

**Events** have a timestamp and can be found in the user timeline. Events can trigger a campaign when they happen. Events can also have properties that qualify them more specifically. Custom events depend on your product, e.g. `project_created`, `notification_sent`, `comment_received`.

- `trial_expired`
- `payment_succeeded`
- `payment_failed`
- `plan_upgraded`
- `plan_downgraded`
- `subscription_cancelled`

Event name

Description


# Segments

**Segments** are user groups that update dynamically. It's a reliable way to store your conditions separately and reuse them for multiple campaigns. Segments are also great for understanding the structure of your user base. Within campaigns, your trigger will sound like "joined a segment" or "left a segment." You can find some segment examples below.

Segment name	Segment conditions
Trialing Users	billing_state = trial (start sending Basic Onboarding campaign)
Trial Ending Soon	billing_state = trial and trial_ends_at is between today and 2 days from now (start sending Trial Expiring campaign)
Paying Users	billing_state = active (start sending Advanced Features campaign)
Advanced Users	billing_state = active and projects > 50 (use your "success metrics" properties here)
Failed Payments	billing_state = past_due (start sending Failed Payment Recovery campaign)
Incomplete Signups	billing_state = missing_card (start sending Signup Abandonment campaign)

Segment name

Segment conditions

Segment name	Segment conditions

# Snippets

**Snippets** are custom bits of text that can be reused across all your messages, campaigns, and broadcasts. You can find some snippet examples below.

Snippet name	Snippet tag	Content
Intro	{{ snippets.intro }}	Dear {{ user.first_name   capitalize   default: "friend" }},
Signature	{{ snippets.signature }}	Regards, Maria from Sparkle.io.

Campaign #

Campaigns are automated sets of messages starting with a trigger. Print out as many campaign worksheets as you need. Also grab our templates for inspiration: <https://docs.userlist.com/article/16-campaign-templates>

Campaign name

What are you planning to achieve using this campaign?

## 1. Trigger

When will you start sending this campaign? Select one of the possible trigger types:

- User creates an account
- Free trial expires
- User becomes a paying customer (subscription\_status = active)
- User cancels an account (subscription\_status = cancelled)
- Event happens for the first time / every time
- Event happens X times (over a certain period of time / ever)
- Properties match a certain condition
- User joins / leaves a segment

Describe your trigger in detail

What properties and events do you need for this trigger?



## 2. Messages

Time delay  
(days/hours/  
none)

Send to all users in the  
campaign, or apply  
additional conditions?

What's the message about? Plan your  
message subject/body


## 3. Exit Condition (Optional)

Should the campaign stop if something happens? E.g. stop promoting a paid plan if the user signs up for it.

--

# Individual Message

Print as many of these as necessary if you need more writing space for each message.

Belongs to campaign

Order #

Time delay (days/hours/none)

--	--	--

Send to all users in the campaign, or apply additional conditions?

--

Channel

Email

In-app message

Message subject

--

Message body

--