CourseMints

GUIDE

Marketing Automation Blueprint

Scale Without Burnout

SELF-PACED PDF COURSE

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Scale Without Burnout

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How to Use This Guide

If your marketing runs on memory, sticky notes and late evenings, automation can give you hours back every week. It can confirm bookings while you sleep, remind a customer that their renewal is due, tell you the moment a hot lead fills in a form, and assemble Monday's numbers before you have had coffee. What it cannot do is replace judgment, relationships or a clear offer. Automating a confused process just produces confusion faster.

This guide is written for small teams: a solo founder, a two-person shop, a five-person agency. It shows you how to decide what to automate, map your customer journey, set up a simple CRM, build the email automations that matter, score and route leads, schedule social posts, report without spreadsheets eating your Fridays, and choose tools you can leave if you need to.

An honest word about "autopilot"

Automation reduces repetitive work; it does not remove work. Every automation needs a little setup, some testing and regular checks, because tools update, offers change and things break quietly. The aim of this guide is a system where a few hours of building and a short weekly check replace many hours of manual repetition, without turning your brand into a robot.

What you will learn

- How to decide what to automate, and what must stay human.
- How to map your customer journey and find the moments where automation helps most.
- CRM basics: fields, lifecycle stages, tags and data hygiene.
- The mechanics of email automation: triggers, delays, branches, suppression, deliverability and consent.
- Lead scoring and handoffs for a small team.

- Social media scheduling without spammy shortcuts.
- Automated reporting that leads to decisions.
- How to choose tools without getting locked in.
- How to avoid over-automation, and a 30-day rollout plan with a maintenance routine.

What this guide does not cover

- **Writing welcome and sales email sequences**, offers and monetization: see *Build Your Email Monetization System in 7 Days*.
- **Creating the free offer** that brings subscribers in: see *Lead Magnet Mastery*.
- **Designing the pages** where people sign up or buy: see *Ultimate Landing Page Conversion Handbook*.

This guide covers the system underneath those: the data, the triggers, the routing, the reporting and the guardrails.

How to get the most from it

1. **Read Chapters 1 to 3 before building anything.** Deciding what to automate, mapping the journey and getting your data right prevent most of the expensive mistakes.
2. **Start with one automation, not ten.** Build it, test it, watch it for two weeks, then add the next.
3. **Do the exercises on paper first.** An automation that cannot be described in plain sentences on paper will not work in software.
4. **Use the 30-day rollout in the final chapter** as your schedule.

> TIP
>
> ### About the examples and tools
>
> The people and businesses in the example boxes are fictional composites written to show the methods in action; they are not real clients. Real tools are named only to describe them, never as endorsements, and features and prices change often, so read any tool detail as “at the time of writing”. Notes on email and privacy law are general information, not legal advice.

CHAPTER 1

What to Automate, and What Not To

01

The first question is not “Which tool?” It is “Which tasks?” Small teams that start with a tool usually end up automating whatever the tool makes easy, rather than what costs them the most time or the most customers.

The anatomy of an automation

Every marketing automation, in any tool, is built from the same five parts:

1. **Trigger:** the event that starts it. A form is submitted, a purchase is made, a date arrives, a tag is added, a contact is inactive for 60 days.
2. **Conditions:** the filters that decide who continues. Only new customers, only people in Canada, only leads who chose “agency” in the form.
3. **Actions:** what happens. Send an email, create a task, update a field, post a message to your team chat, add a row to a spreadsheet.
4. **Waits:** the pauses between actions. Wait one day, wait until Tuesday at 9 am, wait until the order is delivered.
5. **Exit or goal:** when the automation stops. The person buys, books, replies, unsubscribes or reaches the end.

If you can write a task in this shape (“When X happens, if Y is true, do Z, then wait, then do W, and stop if V”), it can probably be automated. If you cannot, it probably needs a human.

Good candidates and poor candidates

Automate	Keep human
Repetitive tasks you do the same way every time	Tasks that need judgment about this particular person
Time-sensitive steps (confirmations, reminders)	Complaints, refunds and anything emotional
Moving data between tools	Negotiation, pricing exceptions, partnerships
Internal alerts (“new lead”, “form broken”)	Rare tasks you do a few times a year
Regular reports	Relationship moments with your best customers

Fix the process before you automate it

Automation copies a process exactly, including its flaws. Before you build anything, do the task manually and deliberately five to ten times, write down every step, and remove the steps that add nothing. Then automate the cleaned-up version. A rule worth remembering: automate a process that works, never one you are still figuring out.

Is it worth it? A quick calculation

1. Estimate the minutes the task takes each time, and how many times a year it happens.
2. Multiply to get the hours a year it costs you now.
3. Estimate the hours to build and test the automation, plus some maintenance time each year.
4. Compare. A task that takes 2 minutes, 10 times a day, on 250 working days, costs about 83 hours a year; an automation that takes a day to build and an hour a month to check pays for itself quickly. A 30-minute task you do twice a year probably does not.

Time is not the only benefit. Some automations are worth building even when they save little time, because they prevent costly mistakes (a missed follow-up, a wrong invoice) or because speed matters to the customer (an instant booking confirmation).

Common mistakes

- **Automating because you can.** If nobody would notice the automation missing, question whether it should exist.
- **Starting with the most complex idea.** Start with a simple, high-volume task that is easy to test.
- **Automating relationships.** A “personal” check-in sent by software to every customer on day 30 is not personal, and customers can tell.
- **Forgetting the exit.** An automation without a clear stop condition keeps emailing people who have already bought, booked or left.

EXAMPLE

Priya’s task log

Priya runs a two-person online store selling pottery supplies. For one week she logged every repetitive marketing and admin task. The biggest were: copying new orders into a spreadsheet for her supplier (about 40 minutes a day), answering “Where is my order?” emails (about 30 minutes a day), and manually emailing customers to ask for reviews (about an hour a week, often forgotten). She also noticed that she never followed up with people who abandoned their carts, because there was no time.

She ranked them by hours saved and by customer impact. Order syncing and shipping updates came first; the review request came second; cart follow-up third. Her weekly newsletter stayed manual on purpose: it was the one place customers heard her voice.

EXERCISE

Task inventory

For one week, log every repetitive marketing or admin task you do. Then fill in the table.

Task	Times per week	Minutes each	Same steps every time?	Needs judgment?	Automate, simplify or keep?