ResultsAiX.com

AIX TRAINING GUIDE 6 OF 15 · FREE

The Email Automations Playbook
10 Ready-To-Copy Automations

How ResultsAiX Mailer automations work, the tagging method behind every email, and ten complete automations with steps, timings, tags, subject lines and sample emails.

Kevin Fahey · ResultsAiX.com

An email automation is an email series that runs by itself. Somebody joins your list, buys your product or clicks a link, and the right emails reach them at the right time, every day, whether you are at your desk or asleep.

Most of the money I make from email comes from automations I built once and then left running for years. A good welcome series, a launch sequence and a buyer onboarding flow will do more for your business than a hundred one-off broadcasts, because they work on every new person, forever.

This guide shows you exactly how automations work inside ResultsAiX Mailer, the tagging method I use on every single email, and then ten complete automations you can copy step by step. Every screenshot is a real ResultsAiX Mailer screen, shown with our example business, Brightline Coaching.

What you will have by the end of this guide

- A clear understanding of triggers, waits, tags, if/else branches and exit rules
- My tagging method, so every open and every click teaches you something
- Ten ready-to-copy automations with steps, timings, tags, subject lines and sample emails
- A 14-day plan to have your core automations built, tested and running

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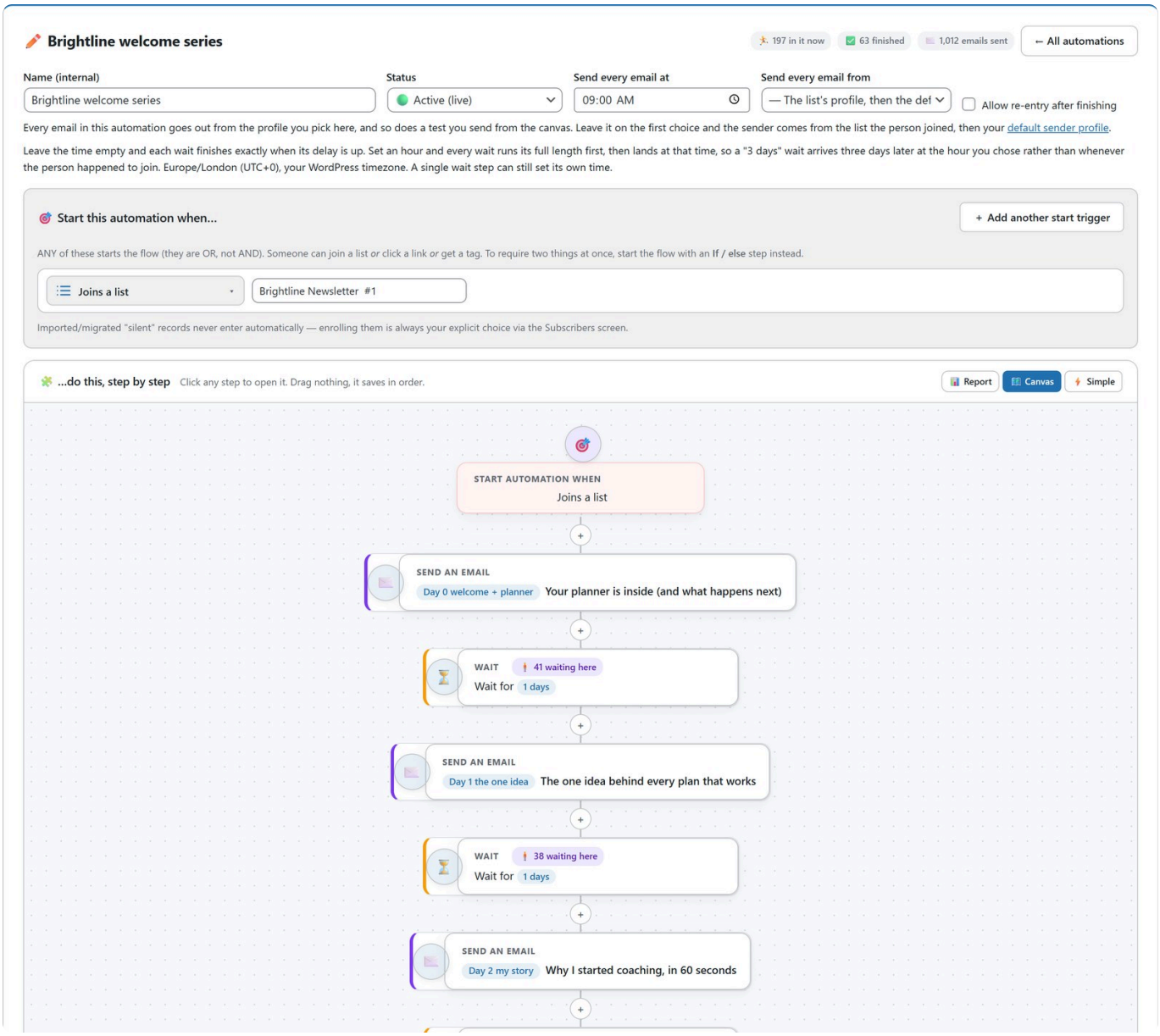
PART 1

How An Automation Works

Every automation in ResultsAiX Mailer has the same simple shape. Something happens (the trigger), the person moves down your steps one at a time (emails, waits, tags and decisions), and they finish at the end, or leave early the moment they reach your goal.



You will find automations in your WordPress admin under **AiX Mailer**, then **Emails**, then **Automations**. The list shows every flow with how many people ever entered, how many are inside right now, how many finished and how many emails it has sent.



A live welcome series on the automation canvas.

The Canvas

Each automation opens on a canvas that reads from top to bottom. The trigger sits at the top, every step sits below it in order, and if/else branches split into a green YES side and a red NO side. Click any step to open it. While an automation is live, each wait shows how many people are sitting at it right now, so you can see your flow working.

Three Settings That Shape Every Automation

Setting	What It Does
Status	**Draft** (nobody enters), **Active** (live) or **Paused**, which holds everyone exactly where they stand until you switch it back on.
Send every email at	Set an hour, such as 09:00, and every wait runs its full length and then lands at that time. A "3 days" wait arrives three days later at 9 AM, whenever the person joined.
Allow re-entry after finishing	Each person goes through an automation once. Tick this when someone may go through again, for example a monthly offer.

There is also **Send every email from**, where you pick one of your sender profiles for the whole automation, so every email and every test goes out from the name and address you choose.

PART 2

The Building Blocks

Here is every building block, with its exact name as you see it in the Mailer. You do not need all of them on day one. Read them once, then come back to this part whenever you build something new.

Triggers: The Front Door

The trigger decides who enters and when. An automation can have more than one: press **Add Another Start Trigger** and any one of them starts the flow.

Trigger	Use It For
Joins a list	Welcome series and lead magnet delivery. On a double opt-in list it starts the moment they confirm.
Confirms their subscription	Starting a flow when someone clicks the confirmation link, on one list or any list.

Gets a tag	The most flexible trigger of all: launches, webinar follow-ups, survey answers, anything another tool tags.
Loses a tag	Ending one track and starting the next.
Submits a form	Any of your capture forms, or one in particular.
Makes a purchase	Buyer onboarding, upsells and review requests, for any order or one product. It appears once your sales are connected on the Integrations tab.
Opens an email	Following up the people who showed interest. Any email, one broadcast, or an email from another automation.
Clicks a link in an email	Interest follow-ups and "clicked but did not buy". Narrow it to one email, one link, or both.
Their score crosses a number	Rewarding your most engaged readers. It fires once each time they cross it.
Was last seen on a page of your site	"Reached the pricing page" follow-ups, from WP Conversion Tracker AI. Checked once a day.
Finishes another automation	Chaining flows: when one ends, the next begins.
A number of days after they joined	Check-ins and join anniversaries. Checked once a day; day 0 is the day they were added.
Their email bounces / Unsubscribes	Keeping your records tidy, such as a note to yourself. An unsubscribe trigger never sends them marketing email.
Manually enrolled only	Flows you start yourself from the Subscribers screen, such as a warm-up for an older list.

Steps: What Happens Next

Between any two steps, the small plus button inserts a new step. These are all eleven:

Step	What It Does
Send an email	The full editor with merge codes such as {{first_name|there}}. Your branding and the unsubscribe footer are added for you.
Wait	A duration from minutes to weeks, or wait until a time of day in your site timezone.
If / else	Splits the flow into YES and NO branches, each with its own steps. Both paths carry on with whatever follows.
Add a tag / Remove a tag	Labels people as they move, so other automations and broadcasts can find them.
Add to a list / Remove from a list	Moves people between lists automatically.
Notify me	A plain email to you, or any address, with the subscriber's details and your note. Perfect when a hot lead clicks.
Call a webhook	Posts the subscriber's details to any URL, for your own scripts and other tools.
Start another automation	Starts them on another flow from its first step.
End here	Stops the journey early on a branch. The last step of a flow ends it anyway.

If / Else: The Questions You Can Ask

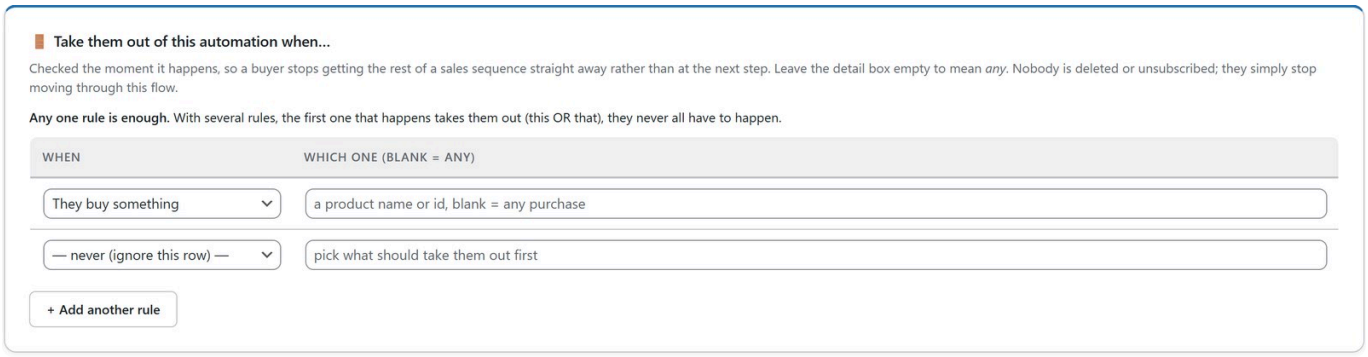
Group	The Person...
Tags and lists	has the tag... / is on the list...
Buying	has bought anything / has bought this product... / has spent more than...

Engagement	opened an email in the last... / clicked an email in the last... / clicked a link containing... / engagement score is at least...
Automations	is in this other automation... / is in ANY other automation / has finished this automation...
Where they are	is in the country...

Exit Rules: Your Goal

Every automation has a section called **Take them out of this automation when...**. This is your goal. Add a rule for **They buy something**, **A tag is added to them**, **They join a list** or **They click a link**, and the person leaves the moment it happens. Leave the detail box empty to mean "any", or fill in a product, a tag, a list or part of a link.

An exit rule is checked the instant the event happens, so a buyer stops receiving the rest of a sales sequence straight away. Nobody is unsubscribed or removed from a list. They simply finish that one automation, and the report records why.



Your goal: a purchase takes them out straight away.

> **Tip**
>
> Every automation that sells something gets an exit rule for the purchase. Every automation that invites people somewhere gets an exit rule for the click. It is the single setting that makes your email feel personal.

See ResultsAiX Mailer →

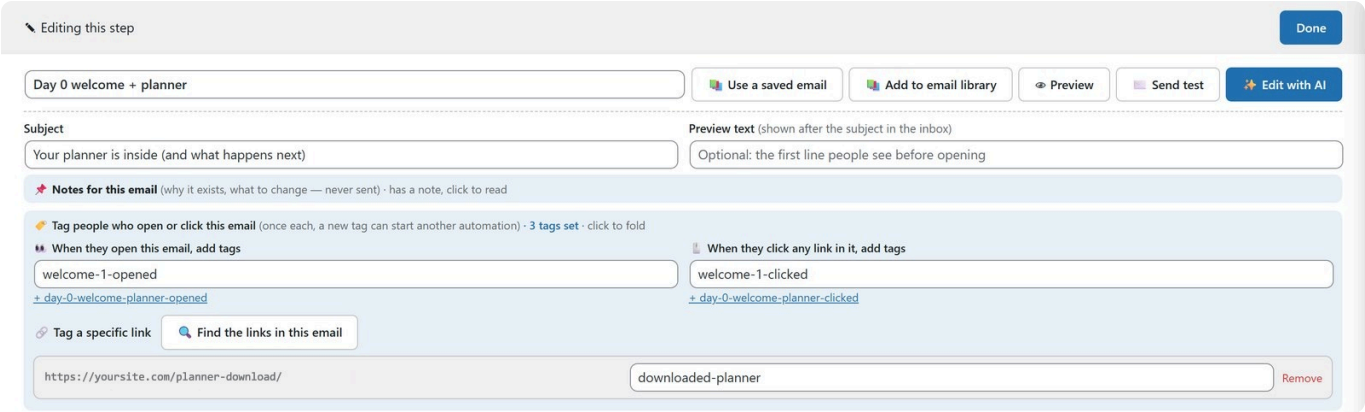
PART 3

My Tagging Method

This is the part most people skip, and it is the part that makes the money. I tag every open, every click and every link in every email I send. After a few weeks your list tells you exactly who is interested in what, and every tag can start another automation by itself.

Open any email step and you will find **Tag people who open or click this email**. It has three boxes:

Box	What I Put In It
When they open this email, add tags	The email's name plus "opened", for example **welcome-1-opened**. The button beside the box fills it in for you.
When they click any link in it, add tags	The email's name plus "clicked", for example **welcome-1-clicked**.
Per-link tags	Press **Find the links in this email** and give each link that matters its own tag, such as **wants-planner** or **clicked-workshop**.



Tag every open, every click and every link.

Each tag is added once per person, however many times they open or click, so your data stays clean. Up to five tags fit in each box, separated by commas. Broadcasts have the same three boxes in their Tagging panel, so the method works on every email you send.

A Naming System That Stays Readable

Tag Type	Pattern	Example
Opened an email	series-number-opened	launch-3-opened
Clicked an email	series-number-clicked	launch-3-clicked
Interest in a topic	wants-topic	wants-traffic, wants-pricing
Interest in an offer	clicked-offer	clicked-workshop
Where they joined	source-place	source-blog-popup
Where they are in your world	status	welcomed, onboarded, vip

Track The Link As Well As The Click

Tags tell you WHO clicked. A tracking link from WP Conversion Tracker AI tells you what the click was WORTH. Give every placement its own sub ID, for example your offer link with /welcome-5 on the end for email five of the welcome series, and the Sub ID Breakdown shows the clicks, leads, sales and revenue that came from each email, down to the subscribers who clicked and bought. Per-link tags keep working with tracking links and with personal links that carry merge codes.

See WP Conversion Tracker AI →

How tags and automations work together

Tags added by opens, clicks and links can start any automation that uses the **Gets a tag** trigger. Tags added by an automation's own Add a tag step label people without starting other flows, so two automations can never chase each other in a loop.

PART 4

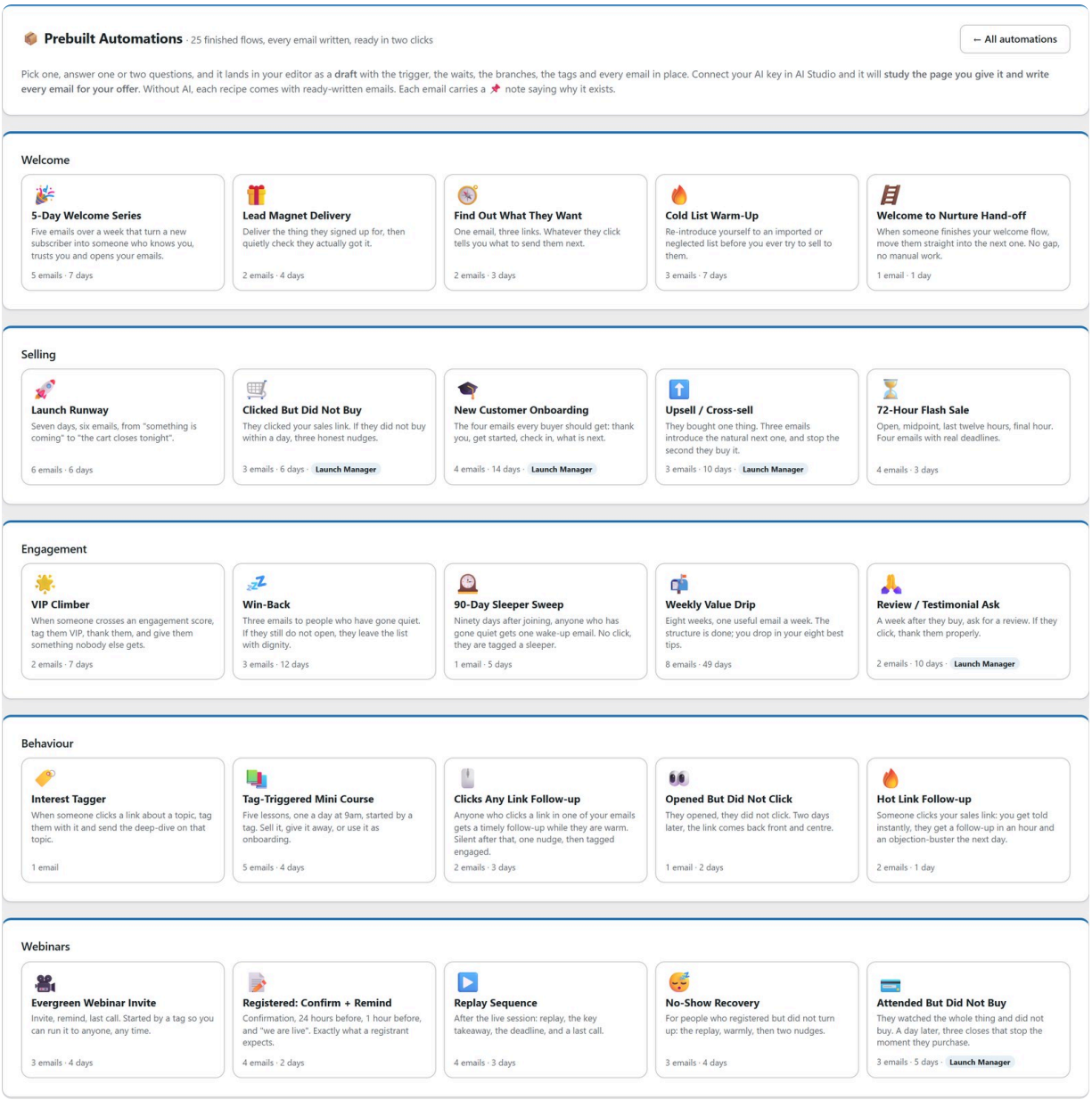
25 Prebuilt Automations And The AI

You do not have to build anything from a blank canvas. Under **Emails** you will find **25 Prebuilt Automations**: finished flows with the trigger, the waits, the branches, the tags and every email already written. Pick one, answer one or two questions, and it lands in your editor as a draft.



▶ **Watch the video**

ResultsAiX Mailer: Build A Complete Automation With AI In 30 Seconds



25 finished automations, ready in two clicks.

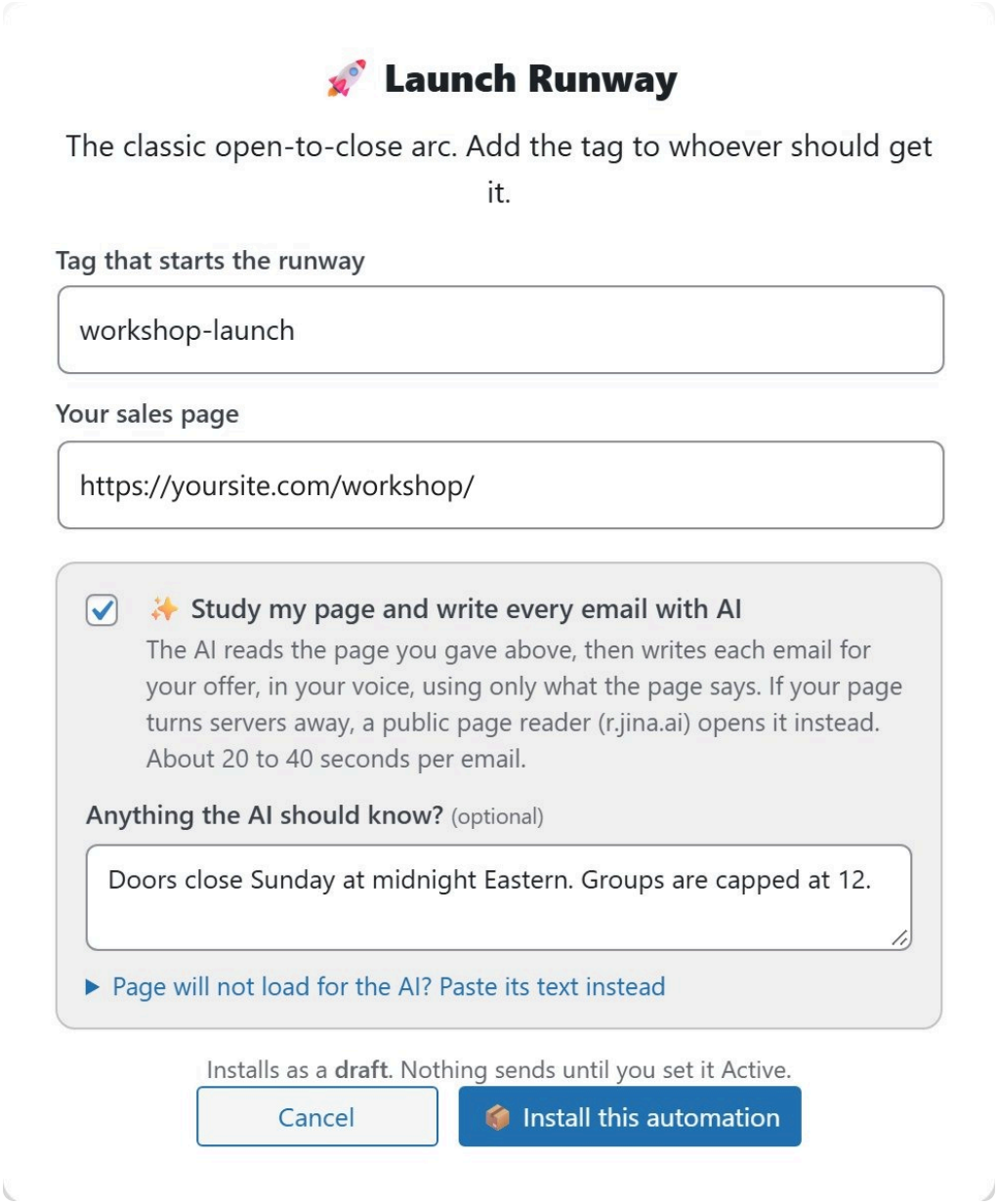
Row	The Prebuilt Automations
Welcome	5-Day Welcome Series, Lead Magnet Delivery, Find Out What They Want, Cold List Warm-Up, Welcome to Nurture Hand-off
Selling	Launch Runway, Clicked But Did Not Buy, New Customer Onboarding, Upsell / Cross-sell, 72-Hour Flash Sale
Engagement	VIP Climber, Win-Back, 90-Day Sleeper Sweep, Weekly Value Drip, Review / Testimonial Ask

Behaviour	Interest Tagger, Tag-Triggered Mini Course, Clicks Any Link Follow-up, Opened But Did Not Click, Hot Link Follow-up
Webinars	Evergreen Webinar Invite, Registered: Confirm + Remind, Replay Sequence, No-Show Recovery, Attended But Did Not Buy

Every email in a prebuilt automation carries a pinned note explaining why it exists and what to change, so you learn the thinking as you edit. The ones that use sales data, such as Clicked But Did Not Buy, switch on as soon as your sales are connected on the Integrations tab.

The AI That Studies Your Sales Page

This is my favourite feature in the whole Mailer. With your AI key connected, the install box shows **Study my page and write every email with AI**. Give it your sales page address and the AI reads the page, works out what you sell, who it is for, the promise and the proof, and then writes every email in the automation for your offer, in your voice, using only what the page says.



The AI studies your sales page and writes every email.

1. Open **25 Prebuilt Automations** and click a tile, for example **Launch Runway**.
2. Answer the questions: the tag that starts it and your sales page address.
3. Keep **Study my page and write every email with AI** ticked, and add anything the AI should know in the optional box, such as your deadline.
4. Click **Install this automation**. The AI writes one email at a time, about 20 to 40 seconds each, and shows you every one as it goes.
5. Open the automation, read every email, put your own touches in, and set it Active when you are

happy.

If your page is behind a security service, open it in a new tab, copy the text and use **Paste its text instead**. The AI carries on from there.

Let The AI Write Your Next Launch

Give ResultsAiX Mailer your sales page and it writes every email of a finished automation for your offer, in your voice.

See ResultsAiX Mailer →

Two More Ways The AI Helps

- **Train Your AI.** Paste in your best emails, up to 150 of them, and press **Learn My Voice**. From then on every email the AI writes sounds like you.
- **The AI Helper.** The button in the corner of the Mailer. Ask it for "a five day follow up series for new buyers" and it writes every email and creates the automation, with the waits and the trigger set, always as a draft for you to read first.

Inside any email step you also have **Use A Saved Email** (your library, including broadcasts you already sent, with their real open rates), **Save To Library** and **Edit With AI**, which rewrites an email in place: "make it shorter", "add a P.S.", "make it friendlier".

PART 5

Build Your First One In 15 Minutes

Here is the whole routine, using a welcome series as the example. Every other automation in this guide is built the same way.

1. Go to **AiX Mailer**, then **Emails**, then **25 Prebuilt Automations**, and click **5-Day Welcome Series**. (Or click **New automation (blank)** to start from nothing.)
2. Pick the list that starts it and the page the last email should send people to, then install it.

3. Give it a clear internal name, such as "Brightline welcome series", and set **Send every email at** to 09:00.
4. Open each email. Name it (for example "Day 1 the one idea"), rewrite the first email fully in your own words, and lightly edit the rest.
5. Add your tags to every email: opened, clicked, and a tag on each link that matters.
6. Under **Take them out of this automation when...**, add **They buy something** if the series leads to an offer.
7. Press **Send test** on each email and read it on your phone.
8. Set the status to **Active** and press **Save automation**.

Your changes save themselves every few seconds as a draft, and only go live when you press Save automation. That means you can edit a running automation safely, and people already inside keep following the published version until you publish the new one.

> **After 15 minutes**
>
> Every new subscriber now gets a warm, personal welcome over seven days, every open and click is tagged, and you never have to think about it again.

PART 6

The Playbook: 10 Automations

Here are the ten automations I would build for any business, in the order I would build them. Each one shows the trigger, every step with its timing, the tags, sample subject lines and a short sample email. The example business is Brightline Coaching, run by Sarah, who helps coaches plan their content. Swap in your own offer and words.

Timings are counted from the step before. With **Send every email at** set to 09:00, each email lands at 9 AM on that day.

1. The Welcome Series

Trigger: Joins a list (your main list). **Goal:** They buy something. **Prebuilt:** 5-Day Welcome Series.

Step	When	What
1	Straight away	Email: welcome, deliver what they asked for, set expectations
2	Wait 1 day	Email: the one idea behind everything you teach
3	Wait 1 day	Email: your story, in about 60 seconds
4	Wait 2 days	Email: a 10-minute win they can use today
5	Wait 3 days	Email: where to go from here, one clear next step
6	Straight away	Add a tag: **welcomed**

Tags: welcome-1-opened to welcome-5-opened, welcome-1-clicked to welcome-5-clicked, plus a link tag on your next step, such as **clicked-start-here**.

Subject lines: "Your planner is inside (and what happens next)" · "The one idea behind every plan that works" · "Why I started coaching, in 60 seconds" · "A 10-minute win for this week" · "Where to go from here"

Sample email 1

Hi {{first_name|there}},

You are in. Here is your Weekly Content Planner: [download the planner]

Over the next week I will send you a few short emails. Each one gives you something you can use straight away, and none of them take more than two minutes to read.

One small favour: reply and tell me what you coach. I read every reply, and it helps me send you the right things.

Talk tomorrow,
Sarah

Tip

Asking for a reply in your first email is one of the best things you can do. Replies tell inbox providers that people want your mail, and they tell you what your readers need.

2. Lead Magnet Delivery

Trigger: Joins a list (the list for that free gift). **Prebuilt:** Lead Magnet Delivery.

Step	When	What
1	Straight away	Email: "Here is your download", with the download link tagged **downloaded-planner**
2	Wait 2 days	If / else: clicked a link containing "planner-download" in the last 2 days
3 YES	Straight away	Add a tag: **downloaded**
3 NO	Straight away	Email: "Did you get it?" with the link again
4 NO	Wait 2 days	If / else again: YES adds **downloaded**, NO adds **never-downloaded**

Subject lines: "Here is your planner" · "Did you get it?" · "Your planner, one more time"

Sample email 2 (the NO branch)

Hi {{first_name|there}},

I sent your Weekly Content Planner on Monday and wanted to make sure it reached you. Here it is again: [download the planner]

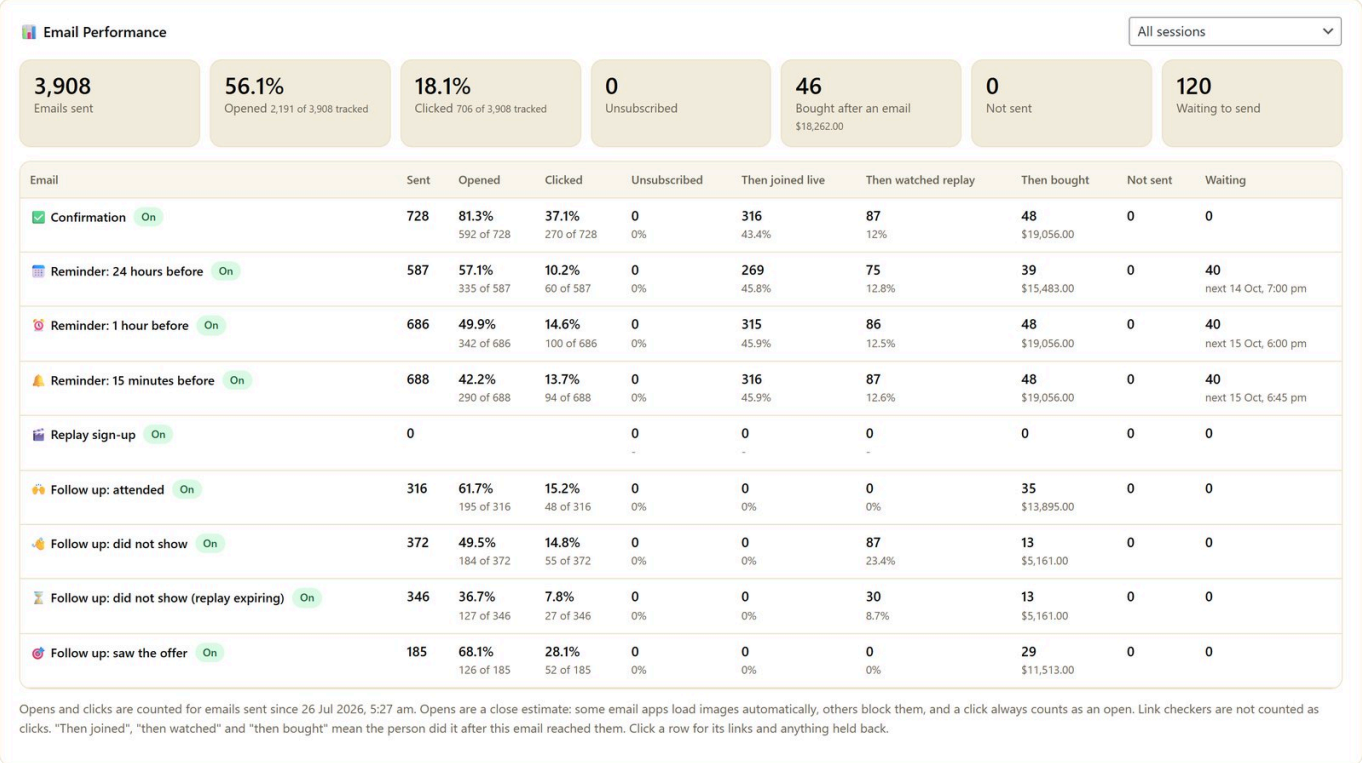
Print page one and fill in just the top box this week. That one box is where most of my clients start.

Sarah

Everyone ends tagged **downloaded** or **never-downloaded**, so you know who used your gift. Run the welcome series alongside it on your main list, or chain them with the Welcome to Nurture Hand-off.

3. Webinar Registration, Reminders And Replay

If you run your webinars with ResultsAiX Webinars, the webinar sends its own confirmation and reminders at 24 hours, 1 hour and 15 minutes before the start, from its Emails tab. Switch on **Tag by behaviour** on its ResultsAiX Mailer connection and it writes tags into the Mailer for you: **Webinar name - Attended**, **- No show**, **- Saw the offer**, **- Clicked the offer** and **- Watched the replay**. The Mailer automations then take over the follow-up.



Email Performance — All sessions

3,908 Emails sent	56.1% Opened 2,191 of 3,908 tracked	18.1% Clicked 706 of 3,908 tracked	0 Unsubscribed	46 Bought after an email $18,262.00	0 Not sent	120 Waiting to send

Email	Sent	Opened	Clicked	Unsubscribed	Then joined live	Then watched replay	Then bought	Not sent	Waiting
Confirmation On	728	81.3% 592 of 728	37.1% 270 of 728	0 0%	316 43.4%	87 12%	48 $19,056.00	0	0
Reminder: 24 hours before On	587	57.1% 335 of 587	10.2% 60 of 587	0 0%	269 45.8%	75 12.8%	39 $15,483.00	0	40 next 14 Oct, 7:00 pm
Reminder: 1 hour before On	686	49.9% 342 of 686	14.6% 100 of 686	0 0%	315 45.9%	86 12.5%	48 $19,056.00	0	40 next 15 Oct, 6:00 pm
Reminder: 15 minutes before On	688	42.2% 290 of 688	13.7% 94 of 688	0 0%	316 45.9%	87 12.6%	48 $19,056.00	0	40 next 15 Oct, 6:45 pm
Replay sign-up On	0			0 -	0 -	0 -	0	0	0
Follow up: attended On	316	61.7% 195 of 316	15.2% 48 of 316	0 0%	0 0%	0 0%	35 $13,895.00	0	0
Follow up: did not show On	372	49.5% 184 of 372	14.8% 55 of 372	0 0%	0 0%	87 23.4%	13 $5,161.00	0	0
Follow up: did not show (replay expiring) On	346	36.7% 127 of 346	7.8% 27 of 346	0 0%	0 0%	30 8.7%	13 $5,161.00	0	0
Follow up: saw the offer On	185	68.1% 126 of 185	28.1% 52 of 185	0 0%	0 0%	0 0%	29 $11,513.00	0	0

Opens and clicks are counted for emails sent since 26 Jul 2026, 5:27 am. Opens are a close estimate: some email apps load images automatically, others block them, and a click always counts as an open. Link checkers are not counted as clicks. "Then joined", "then watched" and "then bought" mean the person did it after this email reached them. Click a row for its links and anything held back.

Webinar reminders and follow-ups, with their results.

Automation A, the no-shows: Trigger: Gets a tag **90-Day Client Plan - No show**. Prebuilt: No-Show Recovery. Exit rule: A tag is added, **90-Day Client Plan - Watched the replay**.

Step	When	What
1	Straight away	Email: "We missed you, here is the replay"
2	Wait 2 days	If / else: clicked an email in the last 2 days. YES: tag **watched-replay**, End here

3 NO	Straight away	Email: "20 minutes, when you have them" (the best part, with the time stamp)
4 NO	Wait 2 days	If clicked, tag **watched-replay**. Otherwise email: "Replay comes down tomorrow" and tag **noshow-unrecovered**

Automation B, attended but did not buy: Trigger: Gets a tag **90-Day Client Plan - Attended**. Prebuilt: Attended But Did Not Buy. Exit rule: They buy something.

Step	When	What
1	Wait 1 day	If / else: has bought this product. YES: End here
2 NO	Straight away	Email: "You saw the whole thing", the main idea and the offer
3 NO	Wait 2 days	If bought, End here. Otherwise email: "What changes when you have it", a client story
4 NO	Wait 2 days	If bought, End here. Otherwise email: "Closing the training offer" and tag **attended-not-bought**

The prebuilt **Replay Sequence** does the same job for attendees who want to watch again: four emails over three days with a real deadline.

Sample email (replay, step 1)

Hi {{first_name|there}},

The 90-Day Client Plan training went live yesterday, and I saved you a seat on the replay: [watch the replay]

The part most coaches tell me they needed is at minute 18, where I map out a full quarter of content on one page.

The replay is up for the next few days.

Sarah

Running your webinar on another platform? Use the prebuilt **Registered: Confirm + Remind** automation, started by the tag your webinar tool adds when someone registers. Put the person's details on every registration link in your emails, for example **?email={{email}}&first_name={{first_name}}**, and ResultsAiX Webinars arrives with the form already filled in.

See ResultsAiX Webinars →

4. The Product Launch

Trigger: Gets a tag (for example **workshop-launch**). **Goal:** They buy something (the workshop). **Prebuilt:** Launch Runway, with the AI studying your sales page.

Step	When	What
1	Straight away	Email: something is coming (the problem, a hint of the answer)
2	Wait 1 day	Email: here is what it is (the offer, who it is for)
3	Wait 2 days	Email: doors are open (the link, the bonuses)
4	Wait 2 days	Email: the question everyone is asking
5	Wait 1 day	Email: closing tonight
6	Wait 8 hours	Email: final hours, then add a tag **launch-complete**

Tags: launch-1-opened to launch-6-opened, launch-1-clicked to launch-6-clicked, and **clicked-workshop** on every sales page link. Use a different WP Conversion Tracker AI sub ID on the sales link in each email so you can see which email sold the most.

Subject lines: "Something is coming on Monday" · "Here is what I have been building" · "Doors are open" · "Is it right for you? (the honest answer)" · "Closing tonight" · "Final hours"

Sample email 3

Hi {{first_name|there}},

The Offer Builder Workshop is open: [see the workshop]

Four weeks, small groups, and you leave with one offer you can describe in a sentence and sell with confidence.

Groups are capped at twelve, so if you want a seat, this is the week.

Sarah

To start the launch, tag the people who should get it. On the Subscribers screen, filter (for example "opened in the last 90 days, not a buyer"), tick **Select All Matching** and add the tag. Everyone tagged starts the runway that minute.

5. Buyer Onboarding

Trigger: Makes a purchase (one product). **Prebuilt:** New Customer Onboarding, then Review / Testimonial Ask.

Step	When	What
1	Straight away	Email: thank you, and here is where to start (the access link)
2	Wait 1 day	Email: the part most people skip (the first quick win)
3	Wait 2 days	Email: how is it going? (invite a reply)
4	Wait 11 days	Email: what comes next (your next product or community)
5	Straight away	Add a tag: **onboarded**

Subject lines: "You are in. Start here" · "The 10 minutes that make the workshop work" · "How is it going, {{first_name|there}}?" · "What comes next"

Sample email 1

Hi {{first_name|there}},

Thank you for joining the Offer Builder Workshop. Your first lesson is ready here: [start lesson one]

Do lesson one before our first call. It takes twenty minutes and it makes everything after it easier.

Any question at all, just reply. I am here.

Sarah

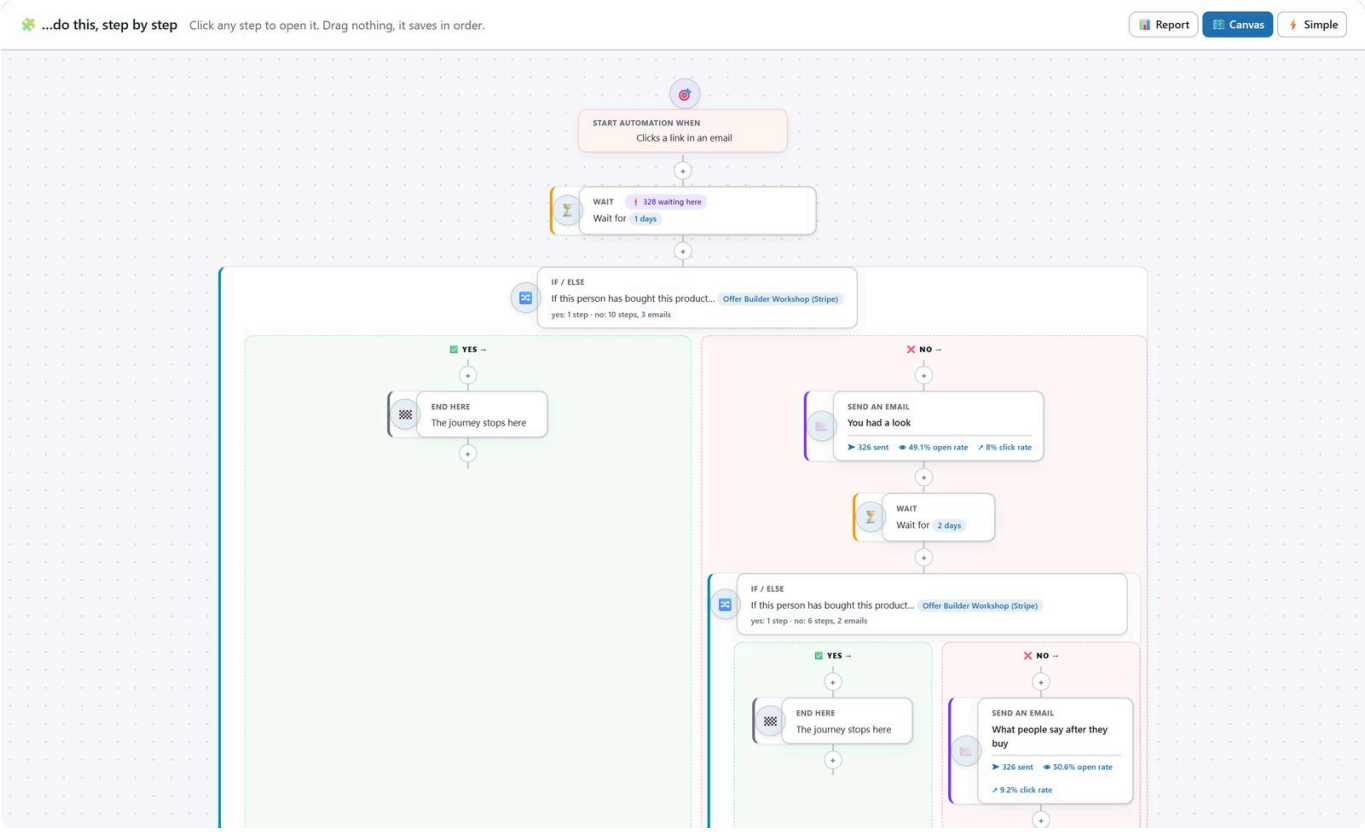
Then add the **Review / Testimonial Ask** prebuilt on the same purchase: it waits seven days, asks for a short review, tags **reviewer** or **no-review**, and thanks the people who leave one. Point the link at your ResultsAiX Testimonials form and the best reviews go straight onto your sales page.

See ResultsAiX Testimonials →

6. Clicked But Did Not Buy

Trigger: Clicks a link in an email, with links containing your sales page address. **Goal:** They buy something. **Prebuilt:** Clicked But Did Not Buy.

Step	When	What
1	Wait 1 day	If / else: has bought this product. YES: End here
2 NO	Straight away	Email: "You had a look" (answer the main question)
3 NO	Wait 2 days	If bought, End here. Otherwise email: "What people say after they buy"
4 NO	Wait 3 days	If bought, End here. Otherwise email: "Last note about this", then add a tag **did-not-buy**



Clicked but did not buy, with live results.

Sample email

Hi {{first_name|there}},

I saw you had a look at the Offer Builder Workshop yesterday. The question I hear most is "will this work for my kind of coaching?"

Holly is a virtual assistant, Owen is a video editor, and both built their offer in week one. If you want to see how: [read their stories]

Sarah

This is usually the highest earning automation on any list, because everyone in it has already raised their hand. Pair it with the **Hot Link Follow-up** prebuilt, which sends you a **Notify me** email the moment someone clicks your most important link.

7. Re-Engagement (Win-Back)

Trigger: Gets a tag (for example **winback-nov**). **Prebuilt:** Win-Back, or the 90-Day Sleeper Sweep to sort your list every day by itself.

Step	When	What
1	Straight away	Email: "Still want these?" with one link to click
2	Wait 4 days	If / else: clicked an email in the last 4 days. YES: tag **reactivated**, remove **winback-nov**, End here
3 NO	Straight away	Email: "Here is what you have missed" (your best three pieces)
4 NO	Wait 5 days	If clicked, tag **reactivated**. Otherwise email: "Should I keep sending these?"
5 NO	Wait 3 days	If clicked, tag **reactivated**. Otherwise remove from the list and tag **lost**

Subject lines: "Still want these, {{first_name|there}}?" · "The three things you missed" · "Should I keep sending these?"

> **Sample email 1**
>
> Hi {{first_name|there}},
>
> It has been a while since you opened one of my emails, and that is fine. Inboxes get busy.
>
> If you still want my weekly content tips, click here and I will know you are still in: [yes, keep them coming]
>
> Sarah

To fill it, find your quiet subscribers on the Subscribers screen (for example "no open in 90 days") and tag them. People who come back are tagged **reactivated**, and your list stays full of people who read. A list like that is exactly what inbox providers reward, which Guide 4 covers in detail.

8. The Join Anniversary

Trigger: A number of days after they joined, set to 365. It is checked once a day and reaches every subscriber on their first anniversary.

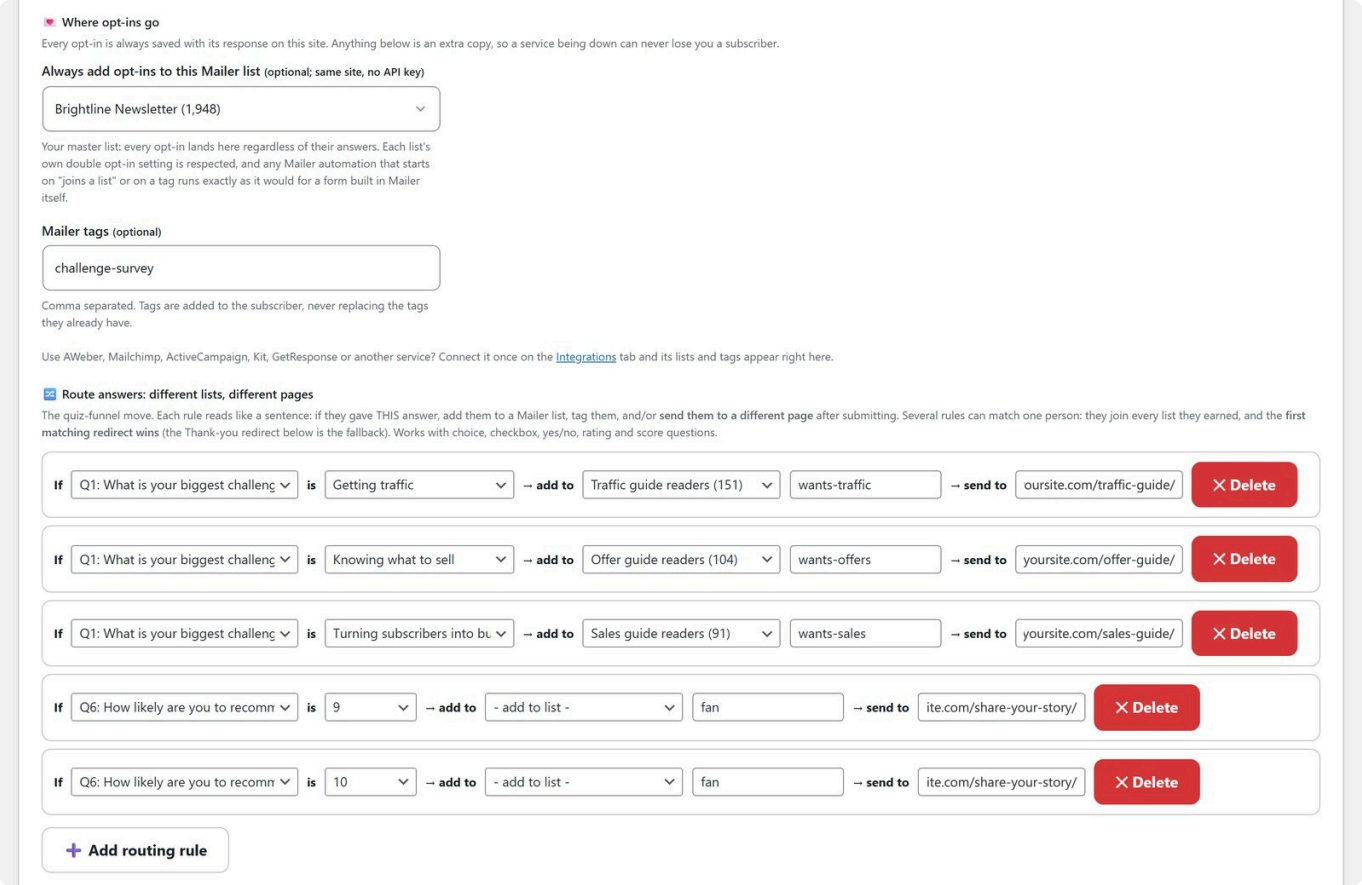
Step	When	What
1	Straight away	Email: "One year together" with a thank-you gift
2	Straight away	Add a tag: **anniversary-1**

> **Sample email**
>
> Hi {{first_name|there}},
>
> A year ago today you joined my list. Thank you for reading, replying and sticking with me.
>
> As a small thank you, here is the template pack I normally keep for clients: [get the templates]
>
> Sarah

Make a second copy with 30 days for a "how is it going?" check-in, and one with 90 days for a "your best three posts" round-up.

9. Survey Follow-Up

Trigger: Gets a tag (added by ResultsAiX Surveys). In your survey's **Route answers to different lists** rules, each answer adds its own tag, for example **wants-traffic**, **wants-offers** or **wants-sales**. Build one short automation per tag.



Each survey answer adds its own tag.

Step	When	What
1	Wait 1 hour	Email: "Thanks for telling me", the best free resource on their answer
2	Wait 2 days	Email: a client story about the same challenge
3	Wait 2 days	Email: the offer that solves it, link tagged **clicked-offer-traffic**

Sample email 1

Hi {{first_name|there}},

Thank you for doing my survey. You said getting traffic is your biggest challenge right now, so here is the guide I wrote for exactly that: [read the traffic guide]

Start with step two. It is the one my clients see results from in the first week.

Sarah

Everyone gets an email about the thing they told you they want. That is as personal as email gets, and it is all automatic.

See ResultsAiX Surveys →

10. The VIP Climber

Trigger: Their score crosses a number (reaches 50). **Prebuilt:** VIP Climber.

Step	When	What
1	Straight away	Add a tag: **vip**
2	Straight away	Email: "You are one of my most engaged readers", with a bonus
3	Wait 7 days	Email: "One question, since you read everything"

Sample email

Hi {{first_name|there}},

You open and click more of my emails than almost anyone, so thank you. Here is something I do not send to everyone: [your early access]

Sarah

Your VIPs give you your best feedback, your first sales and your best testimonials. Treat them like it.

Every Automation, Every Tool, One Key

The ResultsAiX Bundle gives you the Mailer, Webinars, Surveys, Testimonials, WP Conversion Tracker AI and every other ResultsAiX plugin on one licence key.

See The ResultsAiX Bundle →

The Ten At A Glance

Automation	Trigger	Ends With The Tag
Welcome series	Joins a list	welcomed
Lead magnet delivery	Joins a list	downloaded / never-downloaded
Webinar follow-up	Gets a tag (from Webinars)	watched-replay / attended-not-bought
Product launch	Gets a tag	launch-complete
Buyer onboarding	Makes a purchase	onboarded
Clicked but did not buy	Clicks a link in an email	did-not-buy
Re-engagement	Gets a tag	reactivated / lost
Join anniversary	A number of days after they joined	anniversary-1
Survey follow-up	Gets a tag (from Surveys)	clicked-offer-topic
VIP climber	Their score crosses a number	vip

PART 7

Testing, Going Live And Reading Results

Before You Switch It On

- [ ] Every email has a name, a subject and your own words in the first email
- [ ] Every email has its open, click and link tags
- [ ] The goal is set under Take them out of this automation when...
- [ ] Send every email at is set to a time your readers are awake
- [ ] You pressed Send test on every email and read them on your phone

Send test sends the email through the same path a real send uses, with your own details in the merge codes. Nothing is saved and nobody on your list is emailed.

Bringing Existing Subscribers In

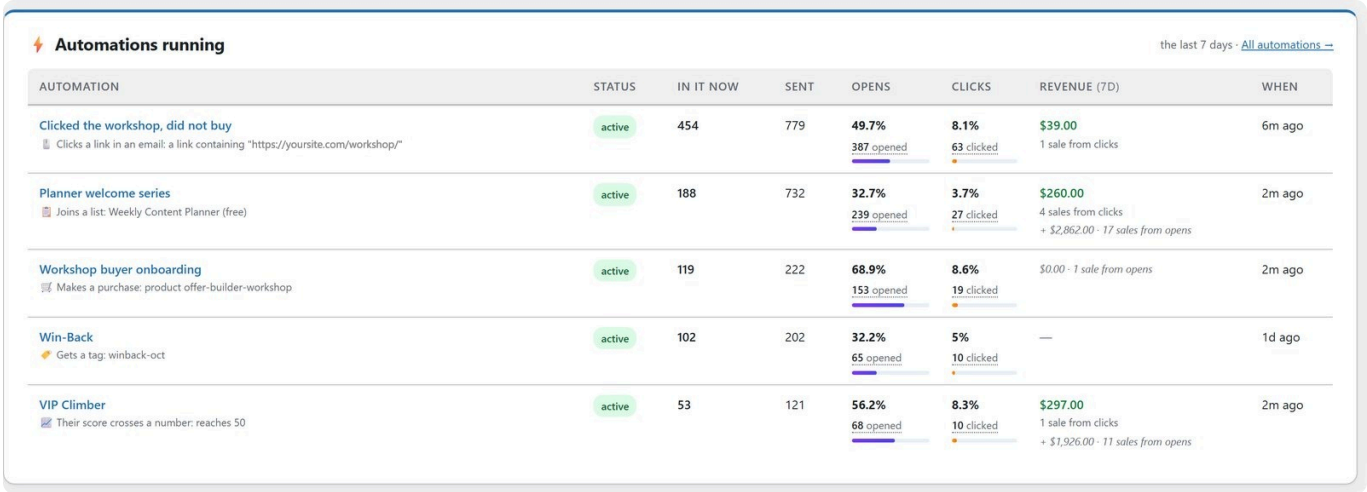
New people enter by themselves. People already on your list join only when you choose: on the Subscribers screen, tick them (or filter and use **Select All Matching**) and choose **Enroll In Automation**. Imported contacts never enter an automation by themselves, so moving a list across is always calm and under your control.

Keeping Broadcasts And Automations In Step

Open any subscriber and you will see **Automations this person is in**: each flow, the exact step they are on and when their next email is due. When you send a broadcast, the **In an automation** audience filter lets you leave out anyone in an automation right now, so a promotion never lands in the middle of someone's welcome series.

The Automation Report

Every automation has a report with one row per email, in the order the flow runs: sent, opens, clicks, unsubscribes, revenue and the people waiting for it. Click any count to see exactly who opened or clicked. The Mailer dashboard also shows every automation running, with the people in it now, opens, clicks and revenue for the last 7 days.



Every automation's results at a glance.

How I improve an automation

Once a month I open the report and find the email where opens hold up but clicks drop. That is the one I rewrite first, usually with a shorter email and one clear link. Small changes to a running automation pay you back on every person who goes through it from then on.

PART 8

Your 14-Day Automation Plan

Two automations a few days apart is a pace anyone can keep. By day 14 you have the five automations that do most of the work in any email business.

DAYS 1 TO 3

Foundations

- Connect your AI key and train your voice with your 10 best emails
- Set Send every email at to 09:00 as your habit
- Install the 5-Day Welcome Series and make email 1 yours
- Tag every email, test, set Active

DAYS 4 TO 7

Deliver And Learn

- Install Lead Magnet Delivery for your free gift
- Add per-link tags to every link that matters
- Install Interest Tagger for your two main topics
- Enrol last month's subscribers in the welcome series

DAYS 8 TO 10

Sell

- Install Clicked But Did Not Buy for your main offer
- Add an exit rule for the purchase
- Create a WP Conversion Tracker AI sub ID for each email
- Install New Customer Onboarding for buyers

DAYS 11 TO 14

Grow And Keep

- Install VIP Climber and the 90-Day Sleeper Sweep
- Set the In an automation filter on your next broadcast
- Plan your first launch with Launch Runway and the AI
- Read every automation report and rewrite one email

By day 14 you will have

A welcome series, lead magnet delivery, a follow-up for everyone who clicks your offer, buyer onboarding and a list that sorts itself by interest and engagement. Every new subscriber from now on gets the right email at the right time, and you see exactly which email made each sale.

PART 9

Questions People Ask

How many automations should I have?

Start with two: a welcome series and lead magnet delivery. Add one at a time from the playbook as your business grows. Automations are unlimited, as are subscribers and emails.

Can one person be in several automations at once?

Yes. Each automation runs on its own. Use the If / else question "is in ANY other automation" or the In an automation filter on broadcasts when you want to keep things calm for someone mid-series.

Can I edit an automation while people are in it?

Yes. Your edits save as a draft, and people inside keep following the published version until you press Save automation. Pause holds everyone in place if you want to make a bigger change.

Do I need the AI to use automations?

No. All 25 prebuilt automations come with ready-written emails. The AI makes them about your offer and in your voice, using your own key from Claude, OpenAI or Gemini.

What is the difference between a tag and a list?

A list is a group people join, usually from a form. A tag is a label that says something about them: what they clicked, bought or told you. I use a few lists and a lot of tags.

How do I start a launch for only some of my subscribers?

Filter them on the Subscribers screen, add the launch tag to everyone matching, and the Gets a tag trigger starts the automation for each of them straight away.

PART 10

What To Read Next

Automations are only as good as the list they run on. Guide 7 shows you every way to grow that list with ResultsAiX, and Guide 8 shows you how to build the funnels your automations send people to.

1 Getting Started With ResultsAiX →

2 The Complete SMTP Service Guide →

3 Setting Up SMTP2GO From Start To Finish →

4 Email Deliverability: Reach The Inbox →

5 Moving Your Email List To The AiX Mailer →

6 Email Automations Playbook *(you are here)*

7 How To Grow Your Email List With ResultsAiX →

8 How To Build Sales Funnels, Start To Finish →

9 How To Move Your Membership To ResultsAiX →

10 Running Customer Support With AI →

11 Launching A Product With Affiliates And JV Partners →

12 ResultsAiX For 6 And 7 Figure Marketers →

13 WP Conversion Tracker: Track Every Click And Every Sale →

14 WP Sync: Connect All Your Tools Without A Monthly Automation Bill →

15 Automated Webinars That Sell →

Your First Step, Today

Open 25 Prebuilt Automations tonight and install the 5-Day Welcome Series. Rewrite the first email in your own words, add your open and click tags, send yourself a test and switch it on. From tomorrow, every new subscriber gets a proper welcome from you, without you lifting a finger.

Start Your First Automation Tonight

ResultsAiX Mailer runs on your own WordPress site with unlimited subscribers, 25 prebuilt automations and the AI that writes them for your offer.

Get ResultsAiX Mailer →

Keep Going

All 15 AiX Training Guides are free on the ResultsAiX blog, each with its own PDF.

Docs: resultsaix.com/docs · Training videos: resultsaix.com/training

ResultsAiX.com

by Kevin Fahey