

5-Email Nurture Sequence Planner

Plan the goal and timing before you design.

Related week: Week 7 | Related SOP: Plan a 5-email nurture | Estimated use time: 45-60 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this planner to define the goal, audience, timing, CTA, stop conditions, and workflow connection for a 5-email nurture before opening the email builder.

Campaign Foundation

Planning item	Decision
Campaign goal	
Audience	
Exclusions	
Consent/source status	
Workflow entry trigger	
Primary conversion goal	
Stop condition	
Reply owner	

5-Email Sequence Map

Email	Purpose	Timing	Subject idea	Primary CTA	Stop/branch note
1	Welcome or confirmation	Immediate			
2	Education	1 day later			
3	Problem awareness	2 days later			
4	Option or solution explanation	3 days later			
5	Clear next step	4-7 days later			

Pre-Send Checklist

- ☐ Each email has one main idea
- ☐ Each email has one primary CTA
- ☐ Footer and unsubscribe are present where needed
- ☐ Reply-to inbox is monitored
- ☐ All links work on mobile
- ☐ Stop conditions are tested before launch

Performance Review

Metric	Notes or action
Delivery rate	
Bounce rate	
Clicks	
Replies	
Bookings/conversions	
Unsubscribes	
Complaints	
Contacts stuck in workflow	

Related Training and SOPs

Related training: Week 7 - Email HTML, Campaigns, and Deliverability

Related SOPs: Plan a 5-email nurture; Build a safe first workflow; Plan reusable custom values; Manage inbox hygiene