

# Behavior-Based 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

How do you think behavior-based email will benefit your SaaS business?

1

2

3

Today's date

# General User Information: Properties

**Properties (user data)** only represent the current state of the user — you can't see what happened in the past. Properties can typically be found in the user profile, and are the most reliable way to store important information about the user. Properties can trigger a campaign when they change value.

- email
- first\_name
- last\_name
- signed\_up\_at
- company
- account\_role (owner, manager, guest, etc)

Property name	Description and possible values

# General User Information: 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.

Event name	Description

# Payment Information: Properties

These properties help trigger payment-related campaigns.

- trial\_expires\_at
- plan
- monthly\_spend
- ltv
- subscription\_status (trial, active, cancelled)
- next\_billing\_on
- billing\_interval (month, year)

Property name

Description and possible values

Property name	Description and possible values

# Payment Information: Events

- trial\_expired
- payment\_succeeded
- payment\_failed
- plan\_upgraded
- plan\_downgraded
- subscription\_cancelled

Event name

Description


# User Activity: Properties

Shows the **current state of things** depending on your product, e.g. projects\_active. Helps to define active/inactive users (how much value the user is receiving from the app right now). Also consider including properties that indicate **total value received** over user's lifetime (total messages sent, etc).

Properties can also indicate what **settings** the user has added or customized depending on your product, e.g. templates, custom\_domains. You can send the values themselves, or merely indicators that things have been accomplished. Such properties help to define the onboarding progress.

Property name	Description and possible values



# 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."

Segment name

Segment conditions




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.io/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:

- Created an account (signed up for a free trial)
- Trial expires
- Converted (signed up for a paid plan)
- Cancelled an account
- Something was done for the first time (property changes from 0 to 1, or event happening for the first time)
- User achieves a certain state (matches conditions or enters a segment)
- User has done something X times (ever, or over a certain period)
- User has not done something over a certain period

Describe your trigger in detail

What properties and events do you need to track?

## 2. Messages

Print additional copies of this page if you need a larger number of messages.

Time delay  
(days/hours/  
none)

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

What properties and  
events do you need  
to track?

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.

What properties and events do you need to track?

# 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?

--

What properties and events do you need to track?

--

Message subject

--

Message body

--