**Automation Goals Checklist**

Before you start planning any automation it is important to identify a few things first, developing goals before you start is a surefire way to obtain great results from automation!!

See our example table below and then fill out your own goals and targets:

| **Automated Workflow Goals** | |
| --- | --- |
| **Automation Purpose** | LeadGen |
| **Funnel stage** | TOFu |
| **Lists Details**  **List category** | Add a list/s here [list name]  Warm List (previous openers) |
| **Persona** | Xyz manager and xyz CEO |
| **Segments** | UK, XYZ industries |
| **Overarching sales goals & time period** | £75,000 - over 3 months |
| **These automation sales goals** | £30,000 |
| **Time before refresh automation** | 3 months |
| **What is an “MQL”:**  **Destination of MQL:** | Score 15 or download an asset  Sales cadence \_\_\_\_\_\_\_\_\_\_\_\_  Sales pipeline \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Automated Workflow Targets** | |
| **No added to automation** | 15,000 |
| **Opens expected** | 15 % [check your industry average [here](https://docs.google.com/document/d/1XuSR4E3DcLmvOwUlHs0xqF8214vyzQBRddy5sC9Skd0/edit?usp=sharing) for warm lists]  225 Opens |
| **Clicks from opens predicted** | 20 %  45 Clicks |
| **Marketing Qualified leads expected from overall list** | 1% overall  150 |
| **Sales Qualified leads** | 10% MQL  15 |
| **Results** | |
| **MQLs** |  |
| **SQLs** |  |
| **Sales** |  |