Unlocking the Power of Automation Triggers in coReel

Automation · https://coreel.ai/help/unlocking-the-power-of-automation-triggers-in-myvideo-email/

Automation triggers let you turn recipient behavior into the next best follow-up automatically. Instead of guessing when to follow up, your system responds based on what the prospect actually does.

Why This Matters

With trigger-based automation, you can:

- Follow up faster
- Personalize timing and message
- Reduce manual task load
- Improve reply and meeting rates

The Core Engagement Signals

For a sales follow-up video email, these are your key trigger points:

1. Email opened or not opened
2. Link/snippet clicked or not clicked
3. Video watched (none/partial/full)
4. CTA clicked or not clicked
5. Reply received or not received

Each signal can trigger a different path in your CRM automation.

Example Automation Playbook: Sales Follow-Up Video

Stage 1: After Send (0–24 hours)

If not opened

- Trigger: No open after 24 hours
- Action:
  - Send a new subject line variation
  - Add task: “Manual nudge call/text”
  - Tag: No Open - First Attempt

If opened but not clicked

- Trigger: Opened, no click after 24 hours
- Action:
  - Send short text-only follow-up
  - Reframe value proposition in 1–2 lines
  - Tag: Opened - No Click

If clicked but no video watch

- Trigger: Clicked, no watch
- Action:
  - Send “quick summary” email with 2 bullet takeaways
  - Ask a low-friction question
  - Tag: Clicked - No Watch

Stage 2: Video Engagement (24–72 hours)

If watched, but didn't watch all of the video

- Trigger: Video watch
- Action:
  - Send a shorter replacement video (20–30 sec)
  - Lead with strongest value point immediately
  - Tag: Low Watch

If watched 100%

- Trigger: Video completed
- Action:
  - Immediate “ready to move forward?” message
  - Route to owner/rep for fast personal follow-up
  - Tag: Video Complete

Stage 3: CTA Behavior

If CTA clicked

- Trigger: CTA clicked
- Action:
  - Mark as high intent
  - Move lifecycle stage forward
  - Create immediate follow-up task
  - Tag: CTA Clicked

If CTA not clicked (after high watch)

- Trigger: High watch + no CTA click after 24h
- Action:
  - Send alternate CTA (lower friction)
  - Example: “Want me to send a 3-point plan instead?”
  - Tag: High Watch - No CTA

Stage 4: Reply Behavior

If replied

- Trigger: Reply received
- Action:
  - Stop nurture sequence
  - Assign owner follow-up immediately
  - Set status to active conversation
  - Tag: Replied

If no reply after multiple touches

- Trigger: No reply after X days/steps
- Action:
  - Enter long-term nurture sequence
  - Lower follow-up frequency
  - Rotate message angle
  - Tag: Nurture - Long Term

Recommended Trigger Priority

When multiple signals happen, prioritize in this order:

1. Reply
2. CTA click
3. High video watch
4. Click
5. Open
6. No engagement

This prevents conflicting automations and keeps outreach human.

Practical Guardrails

- Use delays to avoid over-messaging
- Stop sequence on reply or meeting booked
- Keep one clear goal per automation branch
- Review conversion rates monthly and refine thresholds

Bottom Line

Automation triggers let you run smarter sales follow-up:
the right message, to the right person, at the right time, based on real behavior.