



How a U.S. B2B SaaS Company Automated 75% of Recurring Email Campaigns with 360 Mass Mailer



Industry

B2B SaaS



Company Size

Not Disclosed



Region

United States



Featured Solution

360 Mass Mailer

The Customer

The customer is a U.S.-based B2B SaaS company that relies on Salesforce to manage its lead pipeline, customer lifecycle, and ongoing marketing communication. Recurring emails, including onboarding sequences, renewal reminders, monthly newsletters, and re-engagement campaigns, made up a significant share of the marketing team's workload. As campaign volume grew, maintaining consistent recurring communication became increasingly difficult to manage efficiently.

Problem Statement

Recurring campaigns had to be restarted for each cycle, even when their content, audience criteria, and cadence remained largely unchanged. This made routine email execution dependent on repeated human intervention and increased the risk of inconsistent campaign timing. The team needed to automate recurring email campaigns within Salesforce while keeping its existing CRM data and workflows intact.



The Challenge

Onboarding, renewal, and newsletter campaigns followed recurring schedules but required repeated intervention	Campaign timing depended on marketers remembering when each send was due	Audience criteria had to be reapplied across recurring campaigns
Multi-step follow-ups could not be triggered automatically from a single Salesforce event	Campaign engagement data was not centralized enough to easily compare recurring campaign performance	The team wanted to automate recurring communication without adding another marketing platform

The Solution

360 Mass Mailer moved recurring email execution into automated Salesforce workflows, allowing campaigns to run based on predefined schedules and record-level criteria.

- Built **Drip Email Campaigns** for multi-step onboarding and renewal sequences, with each follow-up triggered automatically
- Set up **Email Schedules** for daily and monthly newsletters, reminders, and other recurring communications
- Used **Flow-based automation** to trigger emails when Leads and Contacts met defined Salesforce criteria
- Created reusable Salesforce and SendGrid templates to standardize recurring campaign content
- Used Salesforce list views and reports to maintain current recipient segments for each send
- Centralized opens, clicks, bounces, and unsubscribes through **Email History** on the related Lead or Contact records

The Outcome

The marketing team automated 75% of its recurring email campaigns using Drip Email Campaigns, scheduled sends, and Flow-based triggers. Newsletters and reminders now run according to predefined schedules, while onboarding and renewal follow-ups are triggered when a Lead or Contact meets the required criteria. Reusable templates also shortened campaign preparation, and Salesforce-based segmentation reduced the need to rebuild recipient lists for each cycle. Campaign engagement remained accessible from Salesforce, allowing the team to evaluate recurring sends without switching between systems. Campaigns requiring custom decisions or one-time changes remained under manual control.

The Impact

75% of recurring email campaigns automated

67% reduction in recurring campaign setup time across onboarding, renewal, and newsletter sequences

34% reduction in manual campaign effort through scheduled sends, drip campaigns, and reusable templates

41% increase in email engagement through improved audience segmentation and campaign execution

2x increase in email campaign ROI based on higher engagement and response rates

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