A Brief Field Guide to Triggered Campaigns

Confirmation emails! …
Shopping cart abandonment offers! …
Content offers based on past behavior! …

The cacophony of email marketing best-practice declarations about what you should be doing with triggered campaigns has reached a deafening volume. Indeed, triggered campaigns represent a great opportunity because, in responding to a customer/prospect action (or inaction), they should be more relevant than the typical batch-and-blast email sent to a mass population. They may even be more relevant than communications driven by explicit preferences definition because they are based on actual behavior rather than on abstract assessments of what would or would not be of interest.

That being said, triggered campaigns today are a bit like the all-you-can-eat smorgasbord buffet: there are so many options and they all seem appealing, but going after everything can be bad for your health. Triggered campaigns, like any marketing tactic, should emerge out of a strategic need, not be pursued because technology makes it possible to do so and "everyone" says you should. To help email marketers understand, think through, and prioritize their triggered campaign options, EMI has created the following Field Guide that lays out the key options for campaigns and ties them back to strategic issues and business scenarios.

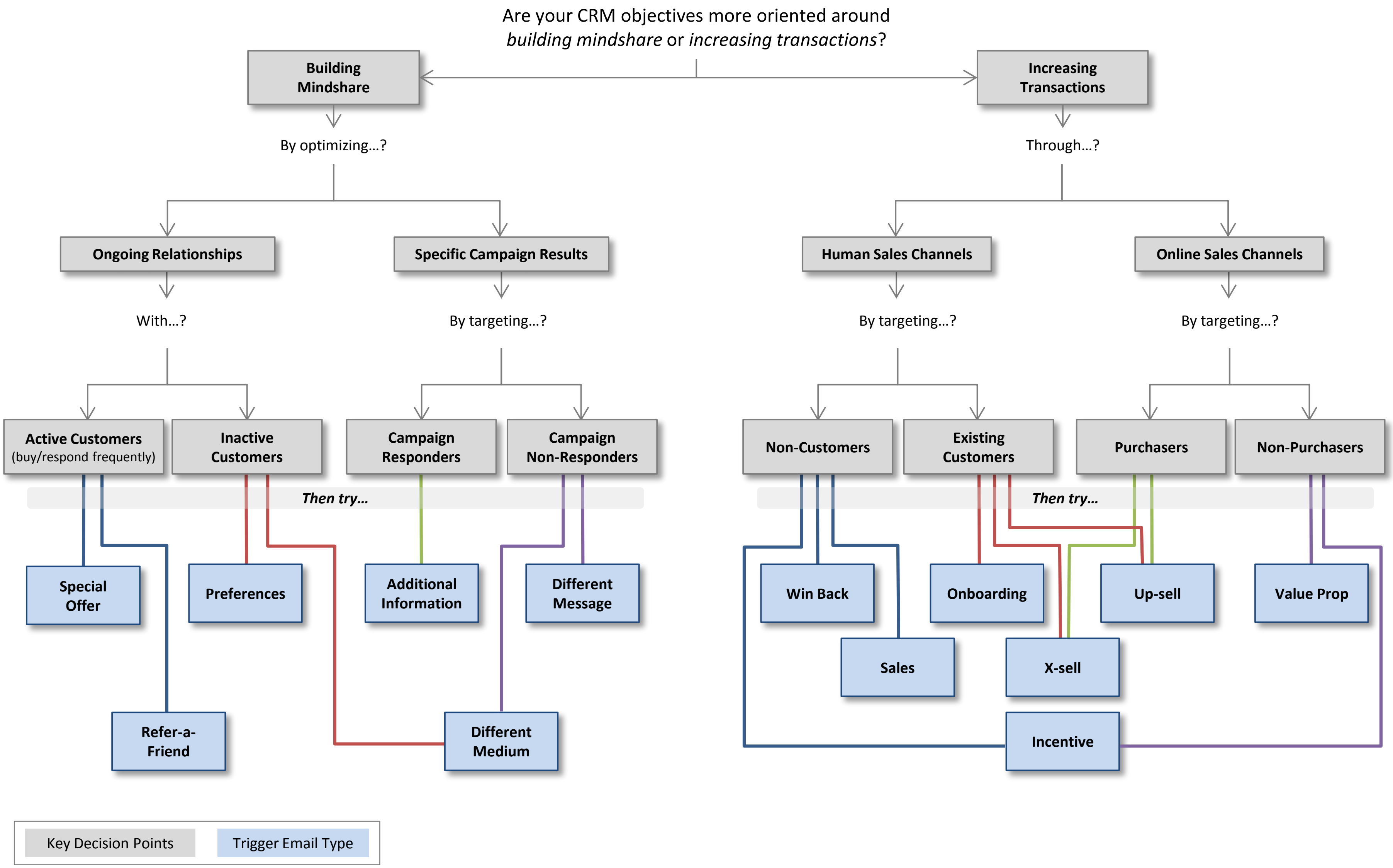
This Field Guide offers two points of entry to help you identify the right triggered campaign for your business. One point of entry, or paradigm, is strategic issues; the other is customer relationship management objectives. For the former, we identify two fundamental strategic issues that can be addressed through the use of triggered campaigns: driving engagement and maximizing average lifetime value of the customer (LVOC). For the latter, there are likewise two objectives: increasing mindshare and increasing transactions.

Approaching triggered campaigns from either of these paradigms leads you to another set of bifurcations as follows:

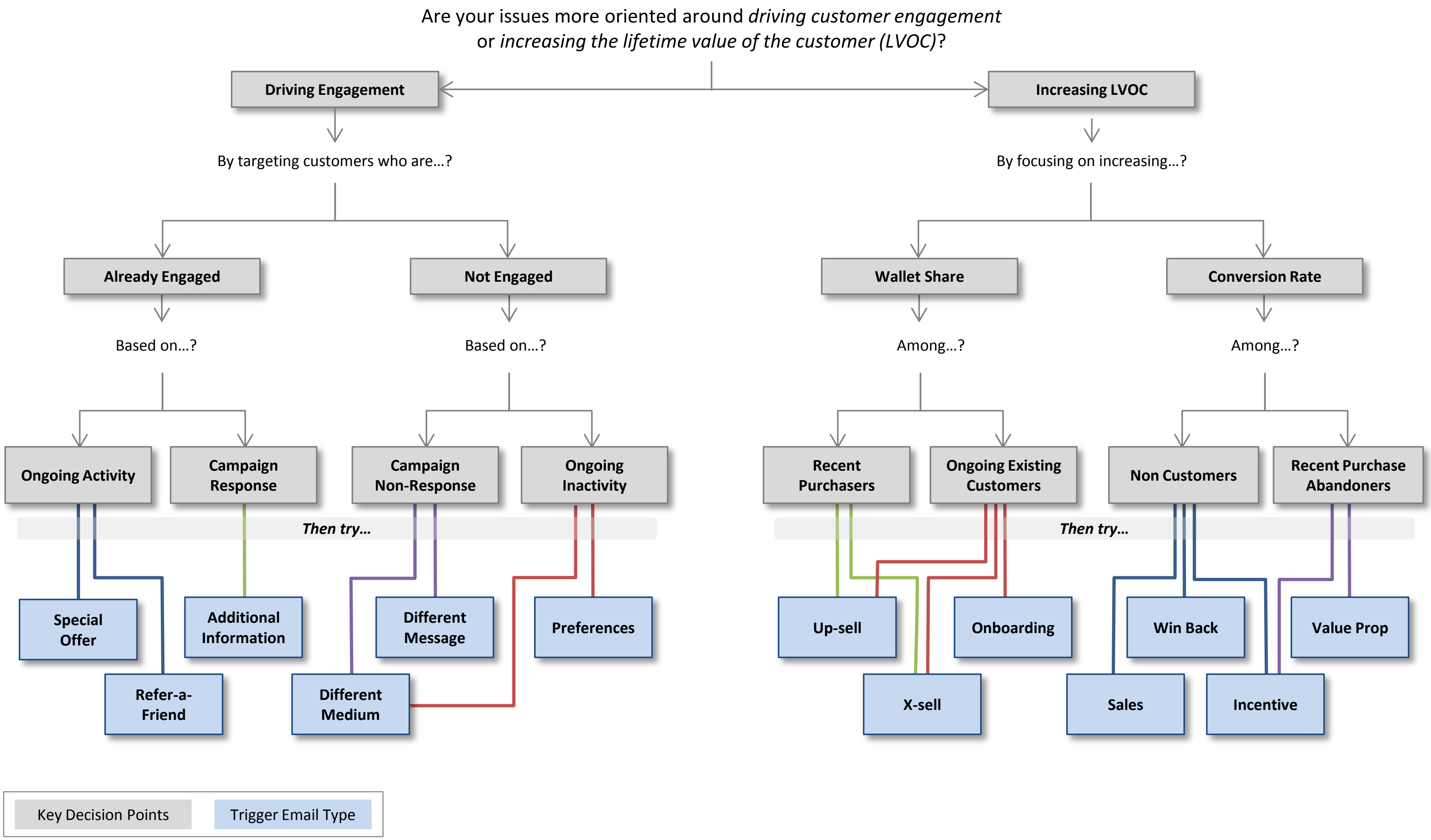
- For engagement, the question is whether the key concern is increasing loyalty among those already engaged or increasing the population of those minimally engaged.
- For LVOC, the question is whether the primary need is to increase the conversion rate or to increase wallet share.
- For mindshare, the key question is whether the frame of reference is a specific campaign or ongoing.
- Finally, for transaction, the key question is whether purchases are executed solely online or with at least some human sales involvement.

These two directions and bifurcations then lead you to a set of options for campaigns that can deliver an impact either by building upon and reinforcing a positive action or by counteracting a negative action (or a lack of action).

Before starting a CRM-oriented triggered campaign, ask yourself…



Before starting a triggered campaign to address strategic issues, ask yourself…



Descriptions of Triggered Campaigns

Refer-a-Friend

Description

The Refer-a-Friend trigger campaign leverages the strength of positive existing customer relationships to grow the base of engaged customers/contacts by taking advantage of the power of word-of-mouth.

The trigger for this campaign is based on an activity threshold within a defined, limited period of time – showing intensity of advocacy.

Key Attributes

- *Offer multiple channels:* Provide options to make recommendations via email as well as the primary social media channels (Facebook, Twitter, Pinterest, LinkedIn)
- *Make it simple:* In all cases, provide easy-to-understand language and pre-populated links that recipients can edit
- *Don't abuse the relationship:* Create trigger override logic so that the same contact isn't targeted by this campaign more frequently than every six months (a year is better)

Special Offer

Description

The Special Offer trigger campaign is used to reinforce the strength of the customer relationship with advocates by rewarding them for their loyalty.

Like Refer-a-Friend, this campaign should be triggered based on passing an activity threshold within a defined, limited period of time – i.e., one that demonstrates intensity of advocacy.

Key Attributes

- *Make it special:* If you're going to offer something to your most loyal customers, you had better show them the love. If the offer feels like a throw-away, it will do more harm than good.
- *Special does not equal expensive:* Sometimes the best offers aren't those that cost the most but rather those that can't otherwise be obtained. An autographed book, exclusive access to subject matter experts and/or content can be extremely powerful rewards.
- *Shout it out:* While it's great to reward your loyal customers, you also want to use this as a carrot for those who aren't in that boat today. Make it easy for your special offer recipients to share news of their rewards by giving them pre-populated social media sharing options.

Additional Information

Description

The Additional Information campaign seeks to turn a positive response to a single campaign – e.g., a download from a web site, a click on an email – into a deeper relationship.

Triggered when a target takes a recorded, unquestionably positive action, the Additional Information campaign builds on the initial action to provide more depth, more breadth and/or more advanced information.

Key Attributes

- *ABR – always be relevant* – Like the Cross-sell/Up-sell campaign, if the follow-up that is triggered by an action fails the relevancy test, sending it could be more damaging than not sending it at all.
- *Time is of the essence:* For this campaign more than most, timeliness is vital to success. The closer in time to the initial action the triggered follow-up is sent, the more likely the recipient will still have the topic in mind and be open to responding.
- *Don't be Big Brother:* While most web and email users today are savvy enough to understand that their actions are being recorded, most will still find it creepy for that fact to be called out to them. The timeliness and relevance of content will have sufficient impact on their own without calling attention to them.

Different Medium/Message – Campaign

Description

The Different Medium/Message campaign targets those who didn't respond to previous campaign with a very simple precept: what was sent before didn't work.

With this in mind, the triggered follow-up campaign should differ from the initial campaign in at least one of three elements:

- Time of day/day of week (e.g., Tuesday)
- Message (e.g., new offer, new value proposition)
- Medium (e.g., direct mail vs. email)

Key Attributes

- *Really make it different:* If you send a follow-up email on the same day at the same time of day as an initial email to which someone didn't respond, you had better do more than change a few words.
- *Lower your expectations:* By definition, you are reaching out to a – at least somewhat – non-responsive audience. In light of this, you shouldn't expect response rates to approach those of typical communications to a broader audience.
- *Test, but think portfolio:* Some alternative approaches may work better than others, but it's likely that no one alternative will work well all the time. Try multiple alternatives rather than completely writing off one approach on the basis of one bad test result.

Different Medium/Message – Relationship

Description

Like its cousin campaign targeting campaign non-respondents, the core principle of the Different Medium/Message-Relationship campaign is that what you've been doing hasn't been working.

In this case, however, the not working has stretched across a longer period of time and multiple campaigns. Because the trigger is an extended, defined period of total non-response, the change in approach needs to represent a more significant break with the past.

Key Attributes

- *Make things different, lower your expectations, and think in terms of portfolios:* These are all attributes of the DM/DM-Relationship campaign, but in all cases, add "more". Because the audience is hardcore non-responders, you have to work harder, expect less, and try more things.
- *Don't forget frequency:* Sometimes, recipients simply tune you out because you send them too much. Try sending a weekly or monthly newsletter instead of multiple emails every week.
- *Past could be prologue:* Try to find groups of contacts that, at one time, responded similarly and target them with a message or via a medium to which they had responded in the past.

Preferences

Description

While giving customers and prospects the opportunity to define their communication preferences can be effective at any point in the customer lifecycle, the Preferences campaign is valuable for resuscitating dormant relationships.

In this context, the campaign should be triggered by a prolonged period of non-responsiveness and should be viewed as a kind of "last ditch" effort to drive re-engagement by allowing the respondents to define explicitly what they want with respect to content, medium, and timing.

Key Attributes

- *Beware what you ask:* If you don't want to send someone content via direct mail, don't offer them that choice. Enabling preferences and not fulfilling them is worse than not asking at all.
- *Make your question heard:* If someone hasn't responded to email in many months, asking them via email to define their preferences is unlikely to get a response. Try multiple media to ensure your message gets through.
- *Give examples:* Whether in the outbound communication or on the landing page, provide examples and descriptions of what you send, and how and when you send it. You're targeting people who don't respond, so it's likely that they're not familiar with the different types of messages they could receive.

Incentive

Description

The Incentive campaign is the classic offer-driven campaign that seeks to compel purchase by sweetening the deal.

Typical scenarios that would trigger this kind of campaign would be a prospect no longer responding to sales outreach, shopping cart abandonment, or cancellation of a subscription or maintenance contract.

Key Attributes

- *Test, test, and test again:* If you're ever going to test, this is place to do it because you should always be seeking out the optimal balance between what you give away and what you gain in return.
- *One size doesn't fit all:* More than most triggered campaigns, the Incentive campaign could differ significantly depending on the situation; what works to get a Fortune 500 company to purchase millions of dollars of equipment isn't going to be the same as what gets an online shopper to buy shoes.
- *Watch out for frequent non-buyers:* The biggest risk with triggered Incentive campaigns is that prospective buyers will deliberately not make a purchase in order to get the discount/incentive. In practice this happens less than marketers fear, but be sure to monitor for anyone who is receiving this triggered campaign with great frequency.

Sales Funnel

Description

Sales Funnel triggered campaigns support the sales force's efforts by targeting prospects at specific points in the purchase decision making process with messages designed to get the prospect "over the hump" and on to the next stage in the funnel (e.g., from "Suspect" to "Qualified" or from "Qualified" to "Proposal").

These campaigns should be triggered when a prospect has exceeded a defined amount of time in a given sales opportunity stage.

Key Attributes

- *Make it personal:* The message should ideally come from the sales rep working the opportunity and should reference something about the prospect's situation. The email should *seem* like it was sent by the sales rep with knowledge of the prospect, even if it was sent by marketing automation software.
- *Make it real:* Don't rely on canned platitudes and generalizations about why anyone – everyone! – should purchase. Do some research with sales and with customers to understand why prospects get hung up at various points in the decision making process, then use that knowledge to tailor messaging specifically addressing those issues.
- *Make it simple:* Prospects don't want to read novels, especially ones (theoretically) sent by their sales person. Keep the copy short and focus the CTA on contacting the sales rep.

Win Back

Description

The Win Back campaign targets those who were once customers and aims to compel them to return.

The trigger for this campaign will differ depending on the customer decision-making process:

- If there is a standard contract period, the campaign should be timed to coincide with the likely end of the competing contract.
- If switching costs are high, you may need to send multiple pulses to maintain engagement and hope for dissatisfaction.
- If switching is easy, proceed without delay.

Key Attributes

- *Be judicious:* Not all customers are worth saving, so invest in winning back those who are and leave those who are not to your competitors. In the execution, don't overdo it. Don't jump immediately to significant discounts or unprofitable offers – doing so just trains the customer that it's beneficial to leave and come back.
- *Ask for feedback:* When appropriate to the situation, the first element of a Win Back campaign should be asking the customer why they left. This intelligence can both help shape your win back messaging and give you valuable insight into how to increase retention.
- *Stay positive:* Throughout the campaign, messaging must not be argumentative or overly critical of the competition. You won't make customers feel guilty or sheepish; it just turns them off.

Onboarding

Description

Onboarding trigger campaigns are the foundation upon which future revenue from existing customers is typically built. Targeting those who have just made a first purchase or who have just been converted to a customer or client, the Onboarding campaign reaffirms the customer's decision of choosing your company, the value of becoming a customer and prepares the audience for future, ongoing communications.

Key Attributes

- *Never be selling:* Onboarding is the time for creating a connection with the company and brand, not for overt selling. If you start to sell and that sales message isn't well received, you can lose the customer's attention for the rest of the onboarding process, maybe permanently.
- *Broaden exposure:* While an onboarding campaign is not the time to sell more products/services, it is the time to make sure that your new customers understand all the elements of your value proposition and all the ways you can help them. If your competitive advantage is high quality products, tell them about your quality control processes; if service is a differentiator, highlight all of the ways you serve customers better than your competitors.
- *Emphasize interaction:* To road to future purchases is paved with engagement. Make sure that your onboarding campaign highlights all the ways to interact with your company, both online and offline.

Cross-Sell / Up-Sell

Description

The easiest sale is usually the one made to an existing, satisfied customer. The Cross-Sell/Up-Sell campaign targets existing customers either immediately after an initial purchase (e.g., in the purchase confirmation) or after an affirmation of satisfaction (e.g., a positive survey response) to drive additional purchases.

Key Attributes

- *Relevance above all:* Like the Additional Information campaign, making the follow-up offer relevant is vital. If you achieve relevance but don't drive additional purchases, you will have more opportunities; if you fail on relevance, you won't be trusted again.
- *Time it right:* In some situations, offering "you might also be interested in..." options in a purchase confirmation or immediately following a purchase is the best time to strike; but if there's a risk that the buyer will be turned off by the quick sales push – e.g., if satisfaction is likely to only come with time and experience using the product or service – it's best to hold off until you know the customer is happy.
- *Make the case:* Even if the additional products or services seem relevant without explanation, provide one. Demonstrate to the recipient why the additional products or services are a logical next step either in copy or, even better, through customer testimonials/ case studies.

Value Proposition

Description

Commonly known as "what you try before you offer an incentive," the Value Proposition campaign targets non-purchasers with a reminder of the benefits of the product they decided not to buy. Like the Incentive campaign, this campaign is triggered by online, unequivocal non-purchase actions like shopping cart or form abandonment.

Key Attributes

- *Boast away:* Using words to overcome buyer hesitation in an online purchase is not easy, so this isn't the time for modesty. Provide a clear contrast as to why you are better than the competition, offer glowing testimonials – whatever is most striking and most likely to move the non-purchaser to action.
- *Think speed and power:* Your best bet is to get the message out quickly and have it speak softly but carry a big stick. While you need to make your case forcefully, you can't make your case verbosely because online purchasers don't want to curl up with your message to analyze the pros and cons of their purchase.
- *Test for the best:* The only way to figure out for sure which verbal weapon will be your most effective is to test.

About the Author

Anthony Nygren is Vice President at EMI Strategic Marketing.

About EMI

For more than 20 years, EMI has been working with technology, telecom and financial services leaders to drive revenue and profit through our clients' sales and service channels. Our blending of industry expertise, strategic insights, and results-oriented programs has helped companies achieve greater growth and increased customer loyalty.

To learn more about what EMI can do for your company, call 617-224-1101 or visit us on the web at emiboston.com.