

# 10

Lifecycle Email  
Campaigns Every  
Brand Needs

Your go-to guide to  
crafting better email  
marketing campaigns  
for every lifecycle stage:  
**activation, nurture** and  
**reactivation.**

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# The Must-Haves of Email Marketing

Marketing has advanced in lockstep with technology, and it's incumbent upon us marketers to take advantage of that. But, as the saying goes, the more things change...

All the multi-channel, personalized, SEO, insert-other-buzzwords-here efforts in the world still share the same goal as the birth of print marketing: establishing a stronger connection between your brand and your audience.

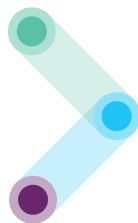
The *what* hasn't changed—the *how* has. And that's where this guide comes in.

“Hey, what about mobile marketing?” you probably didn't actually ask yourself (but maybe are now that it's been brought up). There's a guide for that, too: [10 Mobile Marketing Campaigns Every Brand Needs](#).

## THE THREE PHASES OF THE CUSTOMER LIFECYCLE

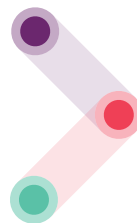
### ACTIVATION

Initial stage of the lifecycle where companies seek to **activate** consumer attention and interest



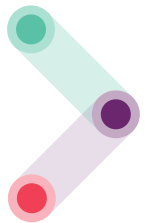
### NURTURE

Ongoing lifecycle stage where companies **nurture** and engage consumers to strengthen relationships



### REACTIVATION

Re-engagement stage of the lifecycle where companies **reactivate** customer engagement to drive retention and loyalty



+ CONVERSION



# First Phase: Activation

This is the part where you grab your audience's attention and keep it long enough so they get to know you, your brand and what you can offer them. And the best way to do that is to start at the beginning...

## 1. Welcome Emails: The First Impression

A welcome email does more than introduce your brand—it's your first, and biggest, chance to turn a connection into a relationship.

A good welcome email will do more than ensure your emails make it to their inbox instead of their junk folder (but that matters, too); they create four key pillars of customer loyalty: familiarity, appreciation, engagement and trust.

### Essential Ingredients

#### 1. Welcome, introduce and establish identity

The junk mail crackdown is on! Welcome campaigns need to clearly establish brand and sender identity to ensure successful delivery (i.e., visible, recognizable "From" and email domain names).

#### 2. Confirm actions and manage expectations

Make sure you're telling subscribers how and why they came to be on your list, that they've successfully completed the action, and what's in store for them next.

### BY THE NUMBERS



**50% average open rate—**  
approx. 86% more effective  
than other marketing emails



**13% more revenue** seen  
by merchants that send  
welcome series vs. a single  
outreach message

### 3. Orient and guide

Forging relationships is your primary objective, so evoking positive emotions will go a long way toward creating attachment and loyalty.

### 4. Prioritize key next steps

If you need a new subscriber to do something to establish the relationship, hand-hold them through the process and plan for additional emails to support that.



Image courtesy of Really Good Emails

#### IN THE WILD: Bombas Welcome Email

#### Why it works:

- ✓ Bold, simple headline
- ✓ Compelling offer
- ✓ Orients user to buying options

## Icing on the Cake

### 1. Personalize and dynamically customize content

Dynamically customize welcome emails to match what you know about the recipient (e.g., name, age, gender, geography, etc.) to boost attention and increase conversion rates.

### 2. Create context-sensitive versions

Deploy unique, distinct messages based on the source of the signup or mode of email address acquisition.

### 3. Design with a cross-channel mindset

Your initial email can be extended to social media using Custom Audiences in Facebook and Instagram, helping you target them with ads that reiterate your welcome campaign messages.

Once you've got their attention, you have a very limited amount of time to keep it. Maintain your momentum by implementing a strong onboarding series...

## 2. Onboarding Series: Have (and Keep) Them at "Hello"

Your welcome campaign is just the start. To solidify channel engagement, grow customer loyalty, and prompt first or repeat purchases, you need to follow this up with an onboarding series.

### Essential Ingredients

#### 1. Orient your newcomers

The broader your array of products and services, the more orientation your newcomers will need. Give your series the space it needs to inform and connect with your audience—and include a capstone message at the end of each email to sum everything up.

#### 2. Build cross-channel connections

An omni-connected subscriber, user, or customer is more valuable than one limited to a single channel (say, just email or only Twitter), because if you lose a connection on one channel, it doesn't spell the end of the relationship.

#### THE TRICK IS...

Each message of your onboarding campaign should have a specific objective, whether that be downloading a mobile app, adding items to a wish list, or simply setting up a sales call.



### 3. Enable behavioral profiling

Use recipient behavior to guide your sending and targeting decisions. This is called “behavioral profiling”—allowing your email subscribers to show you what resonates with them, through their opens, clicks and conversions.

### 4. Gather self-reported data

Volunteered, self-reported data is even more powerful than behavioral profiling. You ask what your customer wants, they tell you, you deliver, they feel validated and a connection is strengthened (this is called a positive mirroring effect).

### 5. Include a bounceback or first-purchase offer

This shouldn't be your standard deal or discount, but something more enticing—and capitalizes on the chance to get your customer to make follow-up purchases.

## Onboarding: Sequences for Success

### Option A: Editorial Cadence

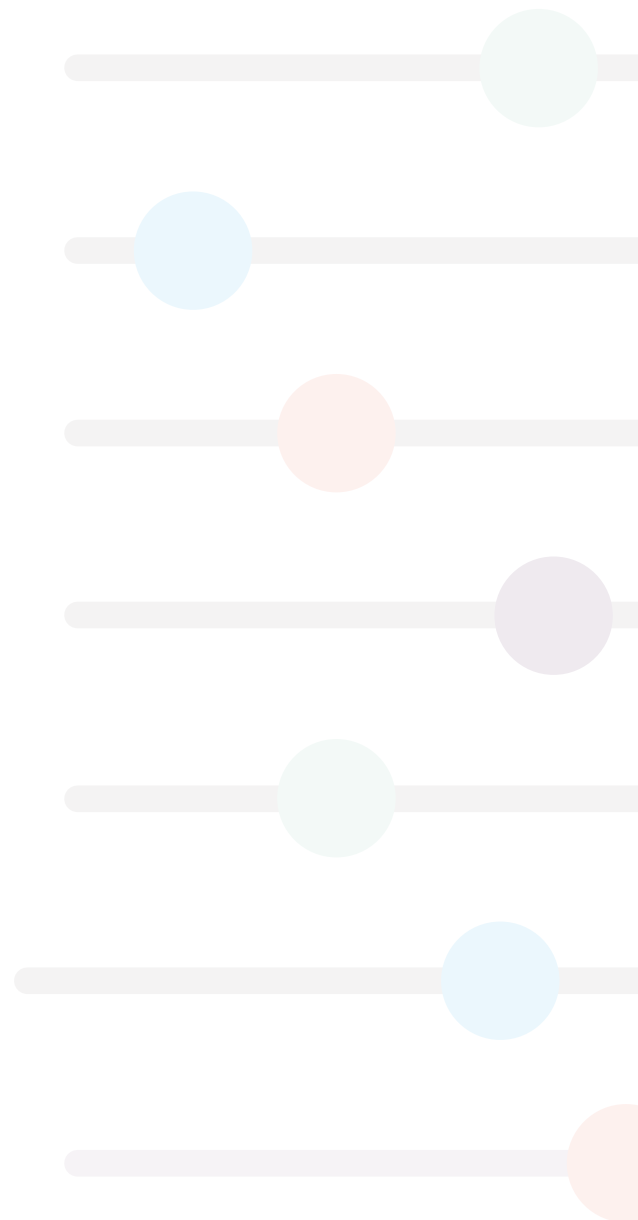
Structure your series based on the content itself so there is an editorial flow. This is a particularly good strategy for brands that are more complex and have a lot to communicate.

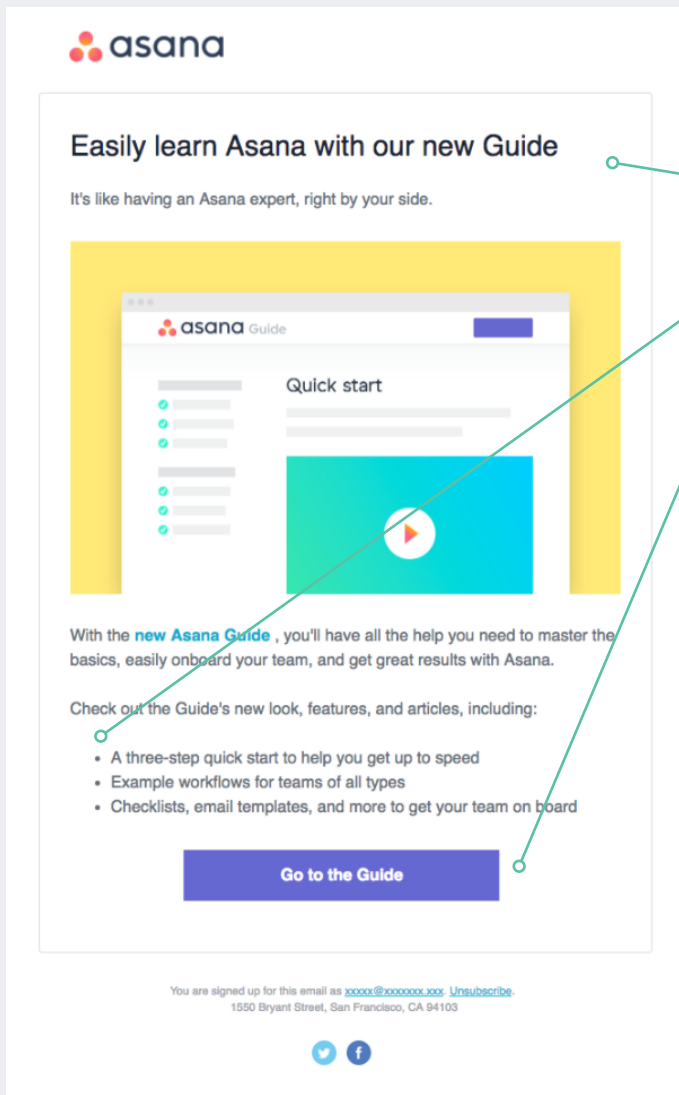
### Option B: Training/Usage Cadence

Walk new users through the steps of getting started, understanding product features, and how to get help.

### Option C: Essential Ingredients Cadence

Front-load your series with messages serving your most important goals—and be sure to wrap up with a high-value offer to entice that first or repeat purchase.





**IN THE WILD:**

**Asana's Onboarding Series**

**Why it works:**

- ✓ Easy-to-navigate visual navigation so readers follow your messaging hierarchy
- ✓ Succinct, digestible next steps for the reader
- ✓ Clear call-to-action

You're probably already brainstorming new activation campaigns that maximizes this advice—but the process of turning new clients into brand loyalists is just getting started. The next phase, "Nurture," is where you have the opportunity to strengthen and deepen your relationships with your customers.





# Second Phase: Nurture

The ongoing lifecycle stage where you consistently engage consumers to strengthen your relationships. These messages can get deployed based on time and—even better—behavior.

## 3. Customer Milestones: A 21st-Century Approach

It's time to move beyond only paying attention to your customers' birthdays and anniversaries. For today's brands to get the ROI they desire, you have to understand the basics of how individuals form their identity—and be ready to take advantage of that data.

### Essential Ingredients

#### 1. Celebrate milestones

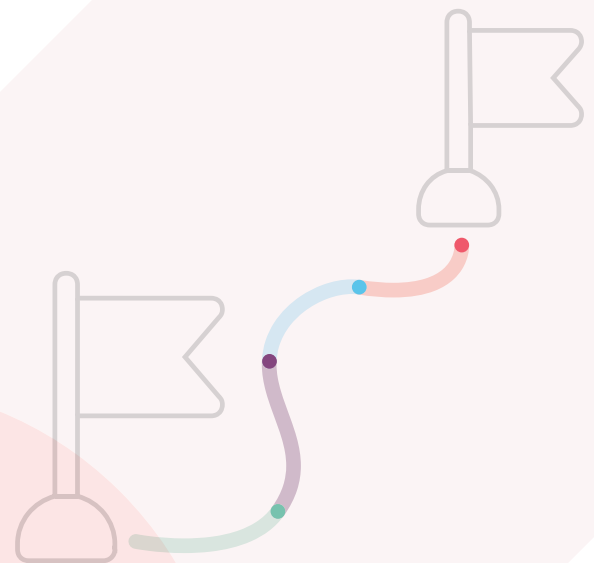
One popular way to celebrate milestones is through a loyalty/rewards program, which can help you identify what exactly your customers like to celebrate.

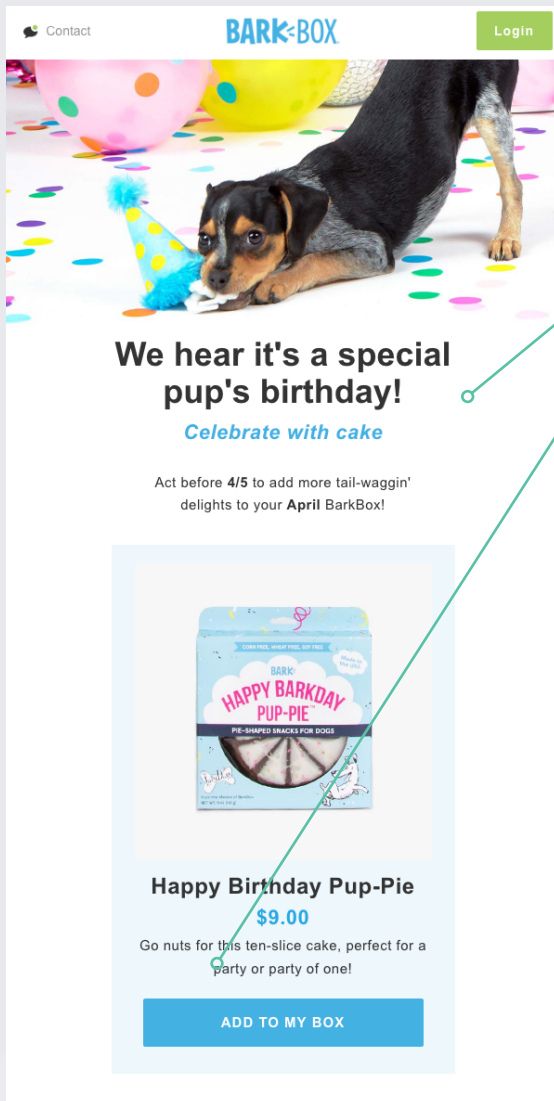
#### 2. Gather data to support those milestones

To get really good at automating and customizing your messaging, you need to collect (and use!) relevant customer data—both via self-volunteered feedback and user behavior tracking.

#### 3. Offer something relevant

For maximum impact, gifts should be meaningful and unexpected, as well as customized for that client.



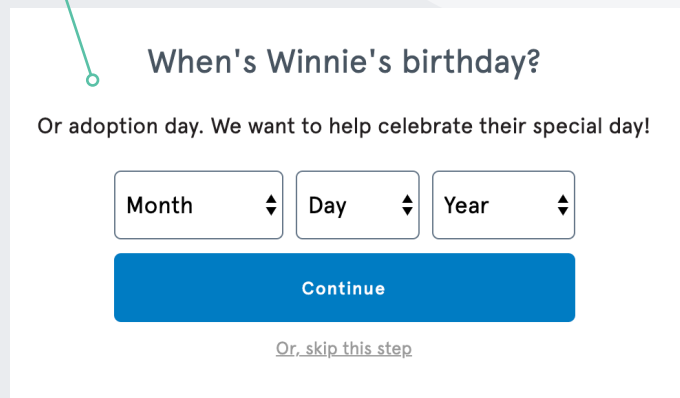


BarkBox sends emails to customers on their dog's birthday or adoption day with a special add-on offer.

### IN THE WILD: BarkBox's Customer Milestones Campaign

#### Why it works:

- ✓ The offer is customized, meaningful and unexpected
- ✓ Clear call-to-action to receive upsell offer
- ✓ Customers are prompted to provide birthday or adoption day data



Customers are prompted to provide birthday or adoption day data.

The psychology is clear: The most effective milestones are the ones that affirm a customer's identity. To discover everything there is to learn about that identity, your best option is to go to the source.

## 4. Surveys & Feedback: The Voice of the Customer (and How to Hear It)

Consumers are inundated by various brand surveys these days, so it's more critical than ever to stand out—and to get those consumers to take time out of their days to share their feedback.

### Essential Ingredients

#### 1. A question to answer

Don't assume that surveys need to be long—sometimes a single question is all it takes to learn how effective a brand process or product is. You can also automate feedback by incorporating questions into your help desk software.

#### 2. An irresistible offer

The most popular survey compensation is a gift card. The reward doesn't have to be money, of course (popular alternatives include a free trial, discounts, and swag), but it does have to be enticing enough for customers to spend their time on your survey.

#### 3. Something to measure

The two most common ways to measure how your consumers are feeling are:

**Net Promoter Score (NPS)** – Measures the likelihood a customer will recommend your brand, on a scale of 1-100

**Promoters (90-100):** loyal and enthusiastic fans

**Passives (60-89):** satisfied, but not necessarily loyal, customers

**Detractors (1-59):** unhappy customers, and loudly so

**Likert Scales** – Asks respondents to rank their level of agreement on a series of statements provided by your brand

### Icing on the Cake

#### 1. Personalized notes

Know what works for your brand and customers. If you ship a physical product, for example, including a handwritten note to ask for feedback is a nice touch that shows effort and time on your part, making it easier for someone to imagine giving you that same time and effort back.

## 2. Recognition and rewards

Show off your customer service as you solicit feedback by allowing customers to select a reward of their choosing.

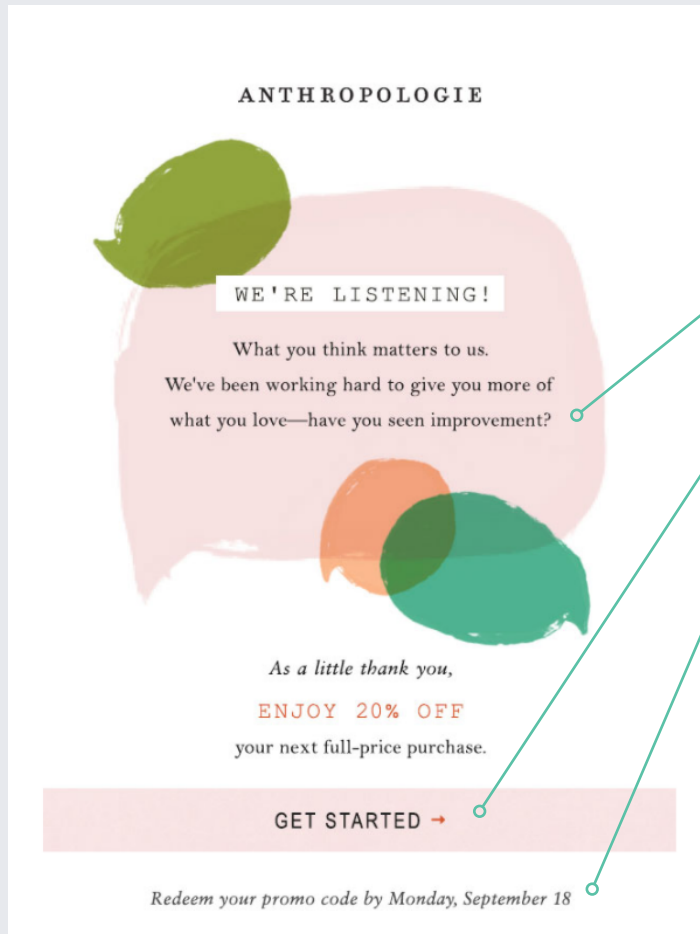


Image courtesy of Really Good Emails

### IN THE WILD:

#### Anthropologie's Request for Feedback

#### Why it works:

- ✓ The ask is direct and simple: "have you seen improvement?"
- ✓ Includes desirable offer in exchange for customer taking a survey
- ✓ Provides sense of urgency with offer expiration

Now that you've gotten to know your customer and what connects them to your brand, it's time to turn their brand loyalty to the next level: brand advocacy.

## 5. Referrals & Advocacy: Your Street Team

Advocacy is when your best customers recommend and refer your brand to new prospective customers (typically their family and friends, but also includes anyone reading one of their reviews or comments).

### Essential Ingredients

#### 1. Be clear, honest and transparent

Lower any resistance or hesitation to your referral program by being upfront about the entire process and shepherding your advocates through it. A message series—a gateway email followed by a reminder (or two), a thank you, and finally a confirmation—can help.

#### 2. Know what motivates action

A good incentive will provide a desirable reward for existing customers while also casting them in a positive light by granting an often-more-lucrative incentive to the new customers they refer you to.

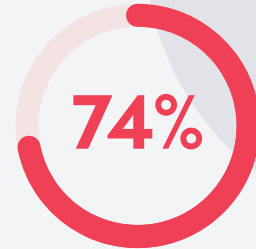
#### 3. Reward customers for referrals

It's simply the easiest and most surefire way to move them into action. Period.

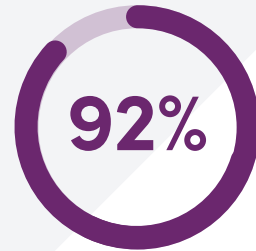
#### 4. Enable and track the process

Some of today's top programs use dynamically generated links and codes unique to each customer, making it easy for those brands to track customer actions across channels, including referral redemptions.

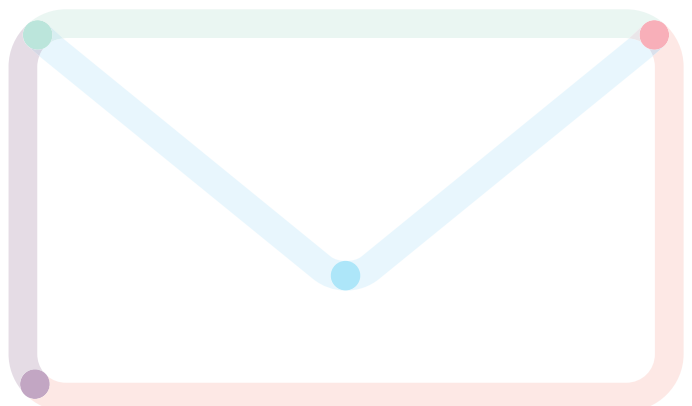
### BY THE NUMBERS

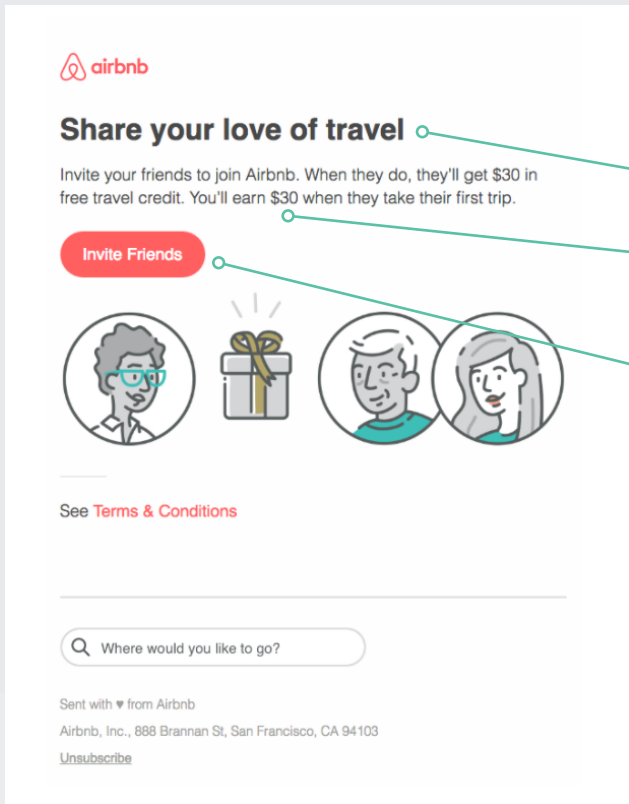


**74% of consumers** cite word-of-mouth as a key influencer in purchasing decisions



**92% of people ages 18-34** seek recommendations from friends and family before making a purchase





**IN THE WILD:**

**Airbnb's Refer-a-Friend Email**

**Why it works:**

- ✓ The messaging clearly spells out how the referral program works
- ✓ The reward for the referred customer is strong, making the original customer feel good about sharing their love of travel
- ✓ The call-to-action is made clear, concise and obvious to the eye

We've talked about how to turn customer attention to loyalty and advocacy—the stuff of marketers' dreams! But what happens when something goes wrong? Read on to discover how to maintain customer relationships during times of crisis.

## 6. Emergency & Crisis: Keep Calm and Market On

Emergencies and crises are, generally, not a great thing for your brand. But they are also an opportunity: to offer new products and services; to rethink operational procedures; and to remind past, present and future customers why they should trust your brand with their business.

### Essential Ingredients

#### 1. A primary message

Critical for all campaigns, but especially so for emergencies—when things are rapidly changing, a primary message can serve as your North Star of sorts to keep you on track (or show you that it's time to pivot). It's also important to remember that recipients are skimming, so you need to prioritize what information is most important for them to know.

#### 2. An appropriate call to action

Typical marketing CTAs like “Shop Now” can come off as insensitive during an emergency or a crisis, especially if your brand doesn't mention the situation at hand and how it affects your customer.

#### 3. The right audience

It's always a good idea to [personalize your campaigns](#). But it's even more important during an emergency or a crisis so your [brand comes across as not only empathetic](#), but mindful: There's a chance not everyone on your list is impacted or will need to take action, so don't bombard them with unnecessary (and/or nerve-wracking) information.

#### 4. Supporting data

According to [crisis communications expert Doug Levy](#), you need three convincing details to make your primary message believable. Using facts or data points adds legitimacy to your message without emotions attached to the emergency or crisis.

#### SPEAK THE SAME LANGUAGE

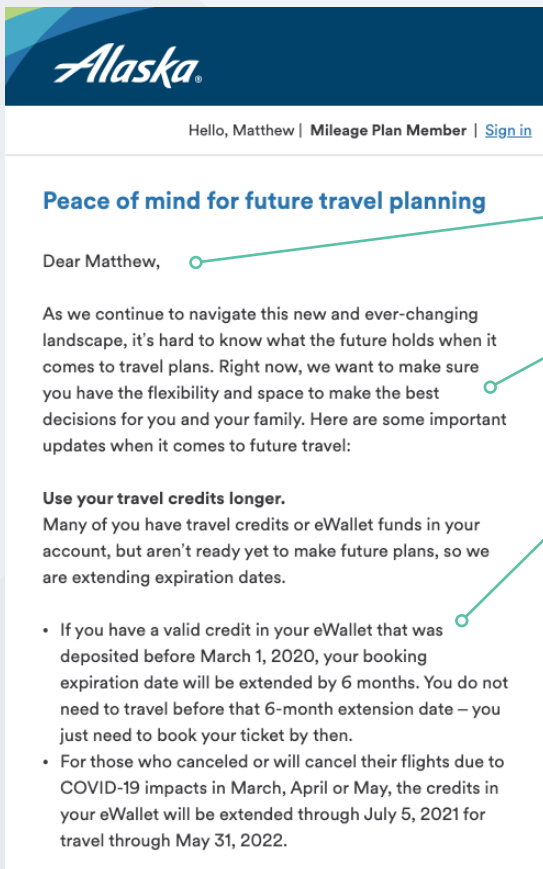
**Emergency:** Any incident, whether natural, technological, or human-caused, that requires responsive action to protect life or property (e.g., natural disasters, oil spills, a plane crash).

**Crisis:** Anything that could negatively influence your business's reputation or bottom line (e.g., product recalls, PR snafu, a government investigation).



## 5. A trustworthy spokesperson

When your brand is deciding who should “send” or be the spokesperson for your campaign, it ultimately comes down to who your recipients trust the most. Levy states, “People are much more likely to trust a person they know or have seen before. If there is no personal relationship, trust can be earned by a person who demonstrates that they give accurate information and have empathy for the audience.”



### IN THE WILD:

#### Alaska Airlines COVID-19 Email

##### Why it works:

- ✓ Email is personalized to the recipient
- ✓ The empathetic language in the first paragraph strikes a sensitive tone
- ✓ Limited the audience to customers who had existing travel credits

It bears repeating: it's more cost-effective to retain customers than acquire new ones. Once you've put in the work to gain a customer, make that work pay off with engaging reactivation campaigns.





# Third Phase: Reactivation

This phase encompasses all efforts to drive customer retention and loyalty, including re-engagement. You've put in too much work with your customers to quit now, and the efforts you make in this phase can set your customer relationships up for a successful future.

## 7. Upsell & Cross-Sell: Maximize Your Brand's Potential

While you can (and should) add upsell and cross-sell opportunities to marketing assets like product pages and checkout flows, you can (and should) also add them to email campaigns.

### Essential Ingredients

#### 1. Order and shipping confirmations

When a customer buys or subscribes from you, the goal is (obviously) for them to do it again. Why not make that as easy as possible by adding a cross-sell or upsell to your order and shipping confirmations?

#### 2. Freemium to premium

It might seem too aggressive to hit customers with a cross-sell or upsell right off the bat, but for many brands—especially those that have freemium vs. premium subscriptions—a purchase is the natural next step after a trial signup. This is also often a time when a customer may be at their most curious about your brand.

Two other critical reactivation initiatives—abandonment and re-engagement campaigns—are a bit meatier, and have earned their own sections below.

#### SPEAK THE SAME LANGUAGE


An **upsell** is when you prompt or entice customers into buying a similar, but higher-end product than the one they're currently using or considering.

A **cross-sell** is when you encourage customers to buy complementary or related items to a product they've purchased or downloaded.



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by Tony Robbins

**"Indistractable: How to Control Your Attention and Choose Your Life"**  
by Nir Eyal

**IN THE WILD:**

**Amazon Kindle Cross-Sell Email**

**Why it works:**

- ✓ Welcome language comes first so offer feels more genuine
- ✓ Relevant cross-sells based on the initial purchase
- ✓ Guides the user on what to do next

Upselling and cross-selling are effective because they meet consumers where they are, and mirrors online shopping behavior they're already comfortable with. Being mindful of your customers' online shopping behavior is critical to your success—especially when customers don't buy from you right away (spoiler alert: most don't).

## 8. Abandonment Campaigns: Don't Let Your Customers Forget About You

It's a painful truth that [over 70% of online shoppers](#) abandon their carts at checkout—and that number is only growing. And it isn't just carts that shoppers can virtually walk away from: browsing, filling out forms, page bouncing and social media engagement can all be abandoned by your customer...

...but you can also get them back.

### Essential Ingredients

#### 1. Timing is everything

Online shopping can happen at any time—if you wait too long to send an abandonment email, a customer may have already completed their purchase elsewhere. But you also need to know your sales cycle. Businesses with long sales cycles, like those in real estate, auto and insurance, may need regularly released abandonment emails to keep their brand top-of-mind.

#### 2. Location, location, location

Meet your customers where they are. If they abandon their cart on a desktop or laptop, send an email; but if they abandon while scrolling your app, send a mobile push notification. And don't forget direct mail—a particularly effective tool for longer sales cycles that also hits customers where they are: home.

#### 3. Metrics matter

Identify and define the metrics your abandonment campaign will track to determine success. Key metrics include delivery rate, open rate, click-through rate, conversion rate, revenue earned per abandoned cart and total revenue earned.

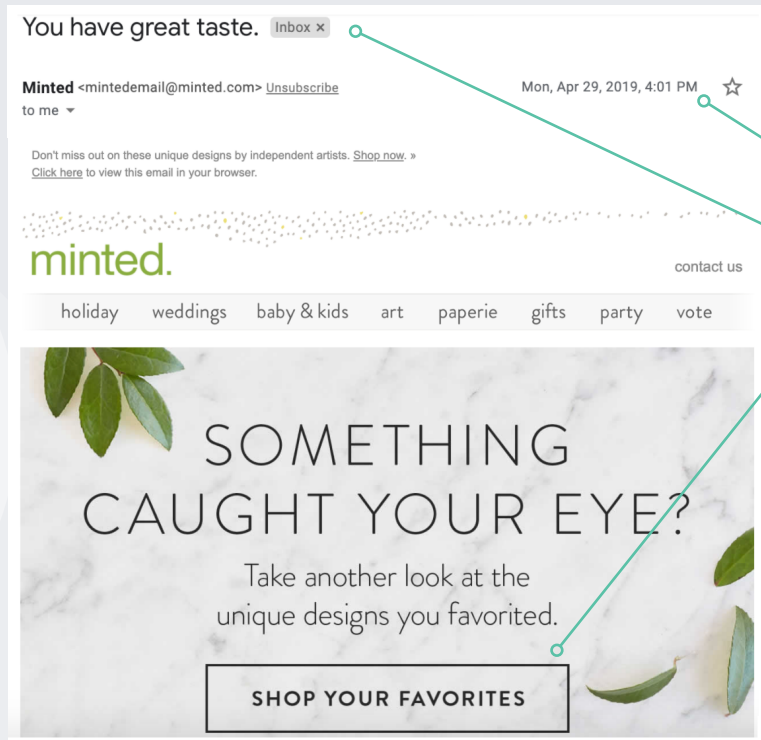
#### BY THE NUMBERS



[10+% conversion rate](#) for cart abandonment emails



[69% higher revenue](#) from three cart abandonment emails than a single email



**IN THE WILD:**  
**Minted's Abandonment Email**

**Why it works:**

- ✓ Deployed within 24 hours of favoriting item
- ✓ Strong, enticing subject line
- ✓ Clear, immediate call-to-action

Abandonment campaigns can reel customers back in for a purchase, but they don't address the long game of maintaining customer loyalty. That's where re-engagement campaigns come in...

## 9. Reactivation & Re-Engagement: The Second (or Third, or Fourth) Chance

Only about 3% of most people are ready to buy “right now.” But further research has shown that 6-7% of your customers are “open to the idea of buying.” You can take advantage of that with reactivation campaigns, reminding inactive subscribers on your list of your brand and, hopefully, persuading them to take action.

### 3 Types of Reactivation Campaigns

#### 1. Free-to-trial

The classic: where a customer decides to offer up some information about themselves in exchange for a free limited-time offer.

#### 2. Trial-to-paid

Once a user has committed to a trial, the real sales process begins. These trials can often range from 7-90 days, so your brand doesn't have a lot of time to convert a user into a loyal customer.

#### 3. Win-back

Thoughtful reactivation campaigns can win back customers who have churned, whether that be out of disinterest, budget concerns or simply forgetting to renew.

#### REACTIVATION BEST PRACTICES

- Remind the recipient of why they signed up
- Spark curiosity
- Introduce new concepts

Source: [Really Good Emails](#)



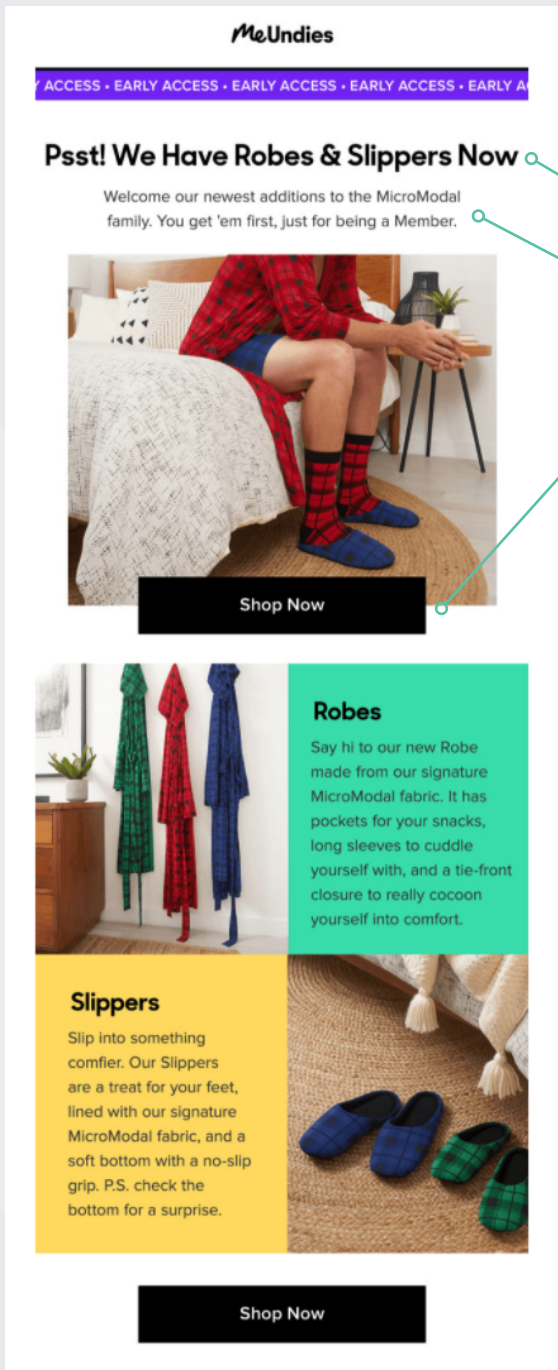


Image courtesy of Really Good Emails

**IN THE WILD:**  
**MeUndies Reactivation Campaign**

**Why it works:**

- ✓ Introduces new products (and reason for reaching out)
- ✓ Reminds reader of the perks of membership
- ✓ Clear, immediate call-to-action

You've been on an incredible journey with your customer: you piqued their interest, kept them engaged enough to interact, weathered a PR nightmare of some stripe, and have brought customers back to your brand. What's next?

## 10. Loyalty: The End Goal

While it's true that marketing never really stops, it's also true that when it comes to building brand advocacy, "loyalty" is the end goal. And once you achieve this level of loyalty from a customer, it requires a different level of thinking and messaging to keep them there.

### Essential Ingredients

#### 1. Enticing offers

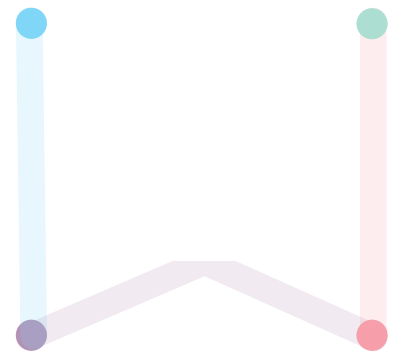
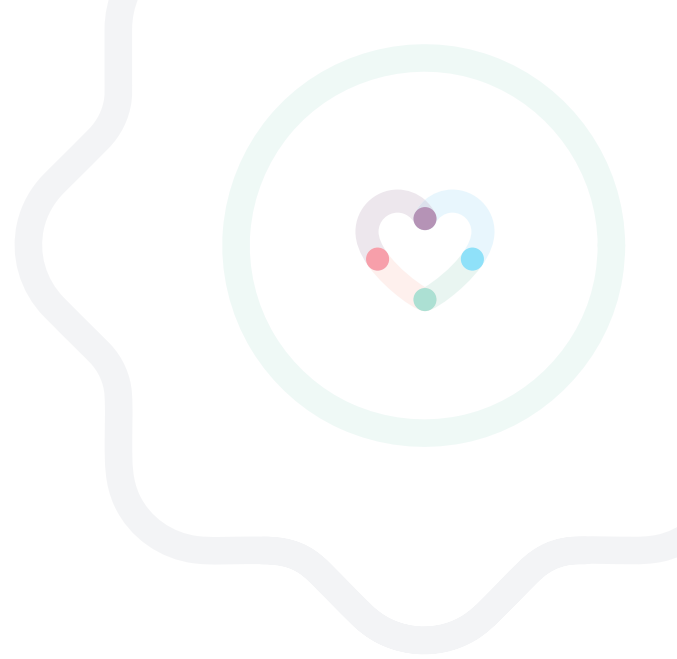
It bears repeating: your loyalty rewards offer has to be worth the customer's time and energy, and it needs to make them feel good about deepening their engagement with your brand.

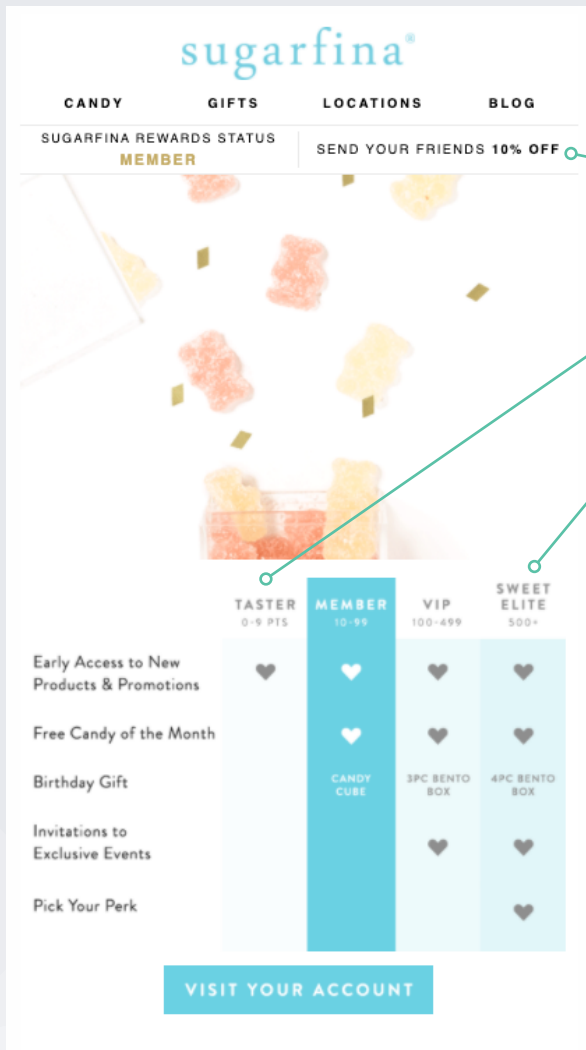
#### 2. Tailored messaging based on loyalty level

Your superstar, platinum customer of ten years should feel like they have their own customer service rep, while a newly minted bronze member needs to feel encouraged to keep going.

#### 3. Something shareable

With [74% of consumers](#) citing word-of-mouth as a key influencer in purchasing decisions, make it easy for your loyal customers to advocate for your brand. You can also help navigate what your customers like by soliciting testimonials, feedback, or participating in beta programs.





**IN THE WILD:**

**Sugarfina's Rewards Email**

**Why it works:**

- ✔ Includes a referral discount to encourage advocacy
- ✔ Defines a set number of points between 0 and 500+
- ✔ Clear depiction of the rewards at each tier

Now that you have the best practices for these ten lifecycle email campaigns, how are you going to put this knowledge into practice?





# About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility. Leading brands, like Zillow, SeatGeek and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.



## Data Flexibility at Your Fingertips

Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.



## Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.



## Agile Iteration & Optimization

Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.



## Customer Journey Mapping

Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable,  
please request a demo.

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