

A Cheat Sheet for Behavioral Marketing Triggers

Marketers inherently understand why the outdated strategy of sending a mass email at 9 a.m. on Tuesdays doesn't cut it anymore: the traditional campaign calendar is proof that while you may be speaking to your audience, you're not actually listening.

Our customers are constantly giving us signals about what they want, need, and are interested in buying. And it's our job to pay attention. Leading brands today are evolving toward moments-based marketing, using triggers to send hyper-personalized messages.

Triggered customer journeys drive 3x more revenue than batch-and-blast campaigns (DMA)

In this cheat sheet, we reveal the most valuable customer signals to track, the associated triggers to incite action, and the recommended response you can send. We even share which channels are best suited for these messages and top brands that are turning insights into impact.

For more resources, research, and tools for the era of moments-based marketing, visit endthecampaign.com.

Definitions

SIGNAL: The action taken by a customer that indicates a marketing effort is needed. These are key moments and behaviors that your marketing technology should automatically track and activate.

TRIGGER: The cue to set off the appropriate journey for the detected customer signal. Instead of mass-blasting your audience with irrelevant information, triggers automate personalized communications.

RESPONSE: The message you send to motivate desired customer behavior. The more individualized the response, the more likely your marketing will seize the moment and create a positive feedback loop.

3 Types of Triggers

There are many types of triggers you can utilize for moments-based marketing, but they tend to fit into one of these three categories:

1. **Engagement-based triggers** react to any action that a user takes with the communications you send, such as opens, clicks, complaints, and unsubscribes. In Iterable, these actions are referred to as system events.
2. **Purchase-based triggers** react to items that users buy and add to their shopping cart. In Iterable, these actions are called commerce events.
3. **Behavior-based triggers** are the most comprehensive, reacting to any action, either active or passive, related to a user. These include everything from searching for specific keywords to adding an item to a favorites list. In Iterable, these triggers are created using custom events.

The 9 Triggers You Need to Capture the Perfect Moments

Now that you know what triggers are and why they're so important for moments-based marketing, here are eight we recommend incorporating into your customer communications strategy.

1. Welcome New Subscribers

CUSTOMER SIGNAL

New website visitor signs up for your mailing list

JOURNEY TRIGGER

Detect completed form registration

MESSAGE RESPONSE

Send a friendly welcome message

BEST CHANNEL OPTIONS

Email to introduce the user to your other channels and request opt-ins

MOMENTS-BASED WIN

89%

Fender users who watch a tutorial video on their first day after a personalized welcome

2. Onboard App Users

New user downloads your mobile application

Detect completed app install

Start an educational onboarding sequence

In-app notifications to orient new users
Email to provide in-depth instructions

4X

Increase in **Calm's** revenue from optimized onboarding

3. Recover Abandoned Carts

Customer adds items to cart but doesn't complete checkout

Recognize abandoned cart after one hour

Send a personalized reminder with dynamic product info (easy to enable with **Iterable Catalog**)

Email to include product info
In-app and mobile push for added urgency

35%

Decrease in **Coinstat's** abandonment rates with cross-channel orchestration across email, in-app & push

4. Offer Cross-Sell Opportunities

The customer buys a product commonly paired with an accessory

Identify cross-sell opportunities based on purchase data

Send a post-purchase follow-up showcasing complementary products

Email with personalized recommendations
Mobile push for timely reminders

2X

Lift in **Omnia Fishing's** CTR with post-purchase email

5. Celebrate Customer Milestones

Customer reaches their 1-year anniversary and makes their 100th purchase

Recognize milestone events based on time or purchase data

Send a celebratory offer with exclusive rewards

In-app or web push to gamify the milestone in the customer's active environment
Email to celebrate the accomplishment
Direct mail to follow-up with a special offer

13%

More orders placed during **Jersey Mike's** annual customer appreciation event

6.
Reactivate
User Interest

CUSTOMER SIGNAL	JOURNEY TRIGGER	MESSAGE RESPONSE	BEST CHANNEL OPTIONS
The mobile app user hasn't opened the app in 14 days	Detect the drop-off in usage	Reactivate users with personalized messages that convey a sense of FOMO to motivate engagement	Email and mobile, like SMS and WhatsApp, to redirect the user to the app and reward activity

MOMENTS-BASED WIN

72%
Lift in converting inactive **Redfin** users to an active state

7.
Respond to
Feedback

Customer submits a negative review or survey response	Identify negative brand affinity	Automatically offer customer support outreach to resolve the issue	Email to connect the customer with the support team WhatsApp message for international users
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33%
Decrease in **RealSelf** opt-outs by using Iterable's AI-powered Brand Affinity

8.
Incentivize
Renewals or
Upgrades

The user's subscription or free trial is set to expire	Detect the appropriate time window before expiration	Send a series of reminders with dynamic offers to incentivize renewal or upgrade	Email to initiate renewal or upgrade Direct mail and SMS follow-ups based on engagement activity
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45%
Increase in **Madison Reed's** upgrade to subscription conversion rate with cross-channel experience

9.
Win Back
Churned
Customers

The customer cancels their annual or monthly subscription	Detect the unsubscribe or cancellation request	Acknowledge and respond to their reason for canceling with a personalized reactivation offer	Email with reactivation offer Mobile follow-ups via SMS, WhatsApp or mobile push to remind customer of subscription value before expiration
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30%
Increase in **Tractive's** reactivations by offering two free months in personalized winback communications

Marketing to the Moment

Your ability to pay close attention to customer signals is only as strong as your marketing technology. Now, thanks to AI, modern martech platforms can automate the entire process, from signal to trigger to individualized response.

Iterable takes triggers to a whole new level. Our AI agent **Nova** makes creating personalized, behavior-based customer journeys as easy as clicking send. Designed to be prescriptive, conversational, and goal-based, Nova helps you take the guesswork out of what your customers want and respond in real-time. **Get in touch** today to see what Nova can do for you.

Want a deeper dive into what it takes to deliver a truly seamless customer experience?
Download [The Marketer's Guide to Cross-Channel Success](#).

