Ready, Set, Send:
Marketing Automation & the Customer Lifecycle

PART 1: THE PRE-PURCHASE WORKOUT

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PART I: THE PRE-PURCHASE WORKOUT

Hey, you. Go run a marathon. Right now! What are you waiting for? Why didn't you run one yesterday? You should have crossed the finish line already, but you haven't even left your desk!

Relax. Take a breath. That anxiety-inducing demand probably sent your heart racing, but there's no need to panic. While your bosses may expect you to "get everything done yesterday," we know that building a successful email marketing program takes dedication, patience, training and a lot of stamina. That doesn't happen overnight, especially if your email program is a tad out of shape.

So, how do you balance these Olympic-sized demands when your email program has transformed from the aspirational new treadmill to a glorified clothes hanger? You have to start by identifying where your strengths lie and where your email program is weak and needs to feel the burn.

Let this four-part white paper series be the personal trainer that whips your triggered email program back into shape. We will explore some commonly overlooked problem areas and help you build an automated foundation that will engage customers, drive sales and build lasting relationships throughout the entire customer lifecycle.

Part I: The Pre-Purchase Workout

- Welcome Emails
- Product Page Abandonment

Part II: Shopping Cart-io

- Abandoned Cart Reminders

Part III: The Post-Purchase Workout

- Order Confirmations
- Shipping Confirmations
- Extended Post-Purchase Series

Part IV: The Overlooked Areas

- Reengagement Emails
- Service Emails

Each triggered message campaign is divided into sections to help you get warmed up, feel the burn and then cool down. We don't want to throw your back out, now do we?

Ready
Assess existing triggered emails and determine subscriber needs.

Set
Build the automated message

Send
Launch, gauge performance and make adjustments.

Let's get started with *Part I: The Pre-Purchase Workout.*

Welcome Series

A retail email program without a welcome email is about as common as a calorie-free cheesecake. The problem with most welcome emails is that once launched, they are quickly ignored by many marketers. That key moment of high engagement when a consumer shows enough interest to opt in to your emails can be quickly deflated by a weak, flabby welcome email.

Ready

First, review the performance of your existing welcome email strategy. Considering the inherent relevance and timing of the email, engagement should be high. Establish benchmarks for the performance of your welcome emails over the past year. Bear in mind that peak acquisition seasons will lead to a spike in new subscribers that may not necessarily translate to higher open, click and conversion rates. Contests and sweepstakes may help boost the size of your list, but many of the new subscribers may just want to win the big prize. The holiday season, or other high-traffic periods for your business, could result in above average list growth with much higher engagement. All of these factors will help you better anticipate the needs of new subscribers throughout the year and build a welcome strategy that can adjust to seasonality and aggressive list growth strategies.

Analyze your existing welcome message (or messages) from a high level and make a list of the messaging elements that are included. Identify components of your message, such as: a first-time purchase incentive, a complete-your-profile request or information about your social networking presence. Note any obvious gaps you might focus on during the "Set" portion of this triggered message coaching. Perhaps you know that your new customers want to know more about your exchange policies or shipping costs before making a purchase, yet there's no mention in the first email you send them.

Set

Now that you have taken the time to dust off your welcome message, it's time to get moving. The following building blocks will help you construct a more sophisticated welcome email campaign.

Design to Brand Standard

Pop Quiz: Can you describe your welcome email without peeking? While you may be able to abstractly describe the email, your memory is likely fuzzy when it comes to details such as:

- Which navigation options are featured?
- Is the logo up-to-date?
- Is there an offer and, if so, is it still functioning correctly?
- Is the "fine print" current?
- Does the unsubscribe link still work?
- Are the products featured (even in lifestyle shots) still available or on-trend?

Basically, your welcome email could be seriously outdated. Worse, you could be sending those enthusiastic new subscribers a plain-text email. (EEK!)

Take a moment to sign up for your email program with a new email address and evaluate your welcome message as if you were a consumer being introduced to your brand for the first time and excited to start shopping. *Does the welcome email work hard enough to keep the momentum going?* Every element of the welcome email should use your brand's voice, imagery and overall aesthetic to help propel the new subscriber along the customer lifecycle.

Set Expectations

It's so simple, yet many retailers easily overlook setting basic expectations for a new subscriber. Let them know how many emails to expect and how frequently those emails will arrive. Yes, letting them know about "exclusive deals" and "local events" is great, but you could quickly lose these blank-slate subscribers once they start receiving more emails than they expected when they signed up. Pair this frequency information with a link to adjust preferences to receive more or less frequent emails and this will ensure you and your newbie get off to a good start.

Build a Multi-Email Welcome Series

If you are only sending one welcome email, you are likely either not including enough information to truly connect with the new subscriber or the email is a cluttered barrage of information. You don't have to take a one-email-fits-all content approach. In fact, building a welcome series can target key areas of a subscriber's evolution from prospect to first-time purchaser and set the stage for long-term engagement.

Consider the following table a menu of options for your welcome email series. Select the themes and content of the emails that will resonate most with your new subscribers.

Email 1:	*Confirm*	Welcome Confirmation
Email 2:	*Educate*	Gift Reminders, Gift Cards, Wish Lists
Email 3:	*Promote*	Product Category Variation
Email 4:	*Expand*	Profile / Preference Building and Social Media Intro
Email 5:	*Engage*	Related Brands, Loyalty Programs
Email 6:	*Incent*	Next Purchase Coupon
Email 7:	*Share*	Videos, FAQs, Brand Story
Email 8:	*Exchange*	Share Your Story, Ratings and Reviews

Customize by Acquisition Source

There are probably several ways consumers can opt in to your email program: *homepage pop-overs, input forms on product pages, online checkout, in-store, mobile app, social networking sites, contests, etc.* No matter the method of opting in, consumers showed interest and signed up for your messaging. You should keep their acquisition source in mind when creating the subscription confirmation and first greeting. A consumer who opted-in during online checkout may have completed the order or abandoned after opting-in. Someone who signs up on a mobile device via text-to-join is not as far down the purchase path and should be welcomed in a way that speaks to the opt-in method and distance from completing an order.

Complete an audit of all acquisition sources and determine the needs of new subscribers from each source. Then, build welcome emails that properly introduce your brand and email program in a way that will facilitate continued engagement and keep the consumer marching along the path to purchase.

Send
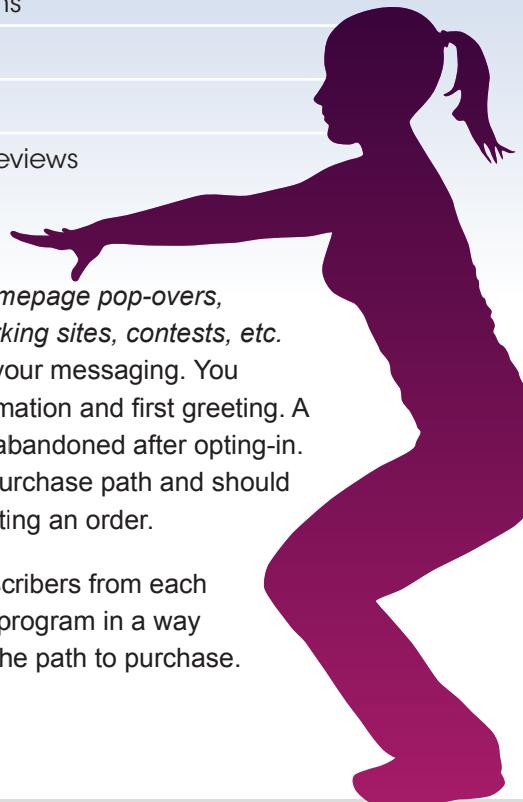
Timing is everything when it comes to your welcome strategy. The initial email should be triggered immediately after someone opts in; however, the timing of subsequent messages needs to be carefully mapped out, and certain data points associated with the new subscriber should shape the flow of the welcome series. For example, subscribers who opted in while making a purchase should not receive a first-time order offer in their welcome email while those who opted in on your homepage may need that incentive to kick-start some serious shopping. If the first-time purchase offer is not redeemed after a period of time, you can send a reminder email noting the expiration of the coupon.

As your welcome series progresses, leverage open, click and conversion metrics to steer new subscribers through the most relevant emails in the series. Non-openers of a *"Set Up a Wish List and Gift Reminders"* themed message could receive a follow-up email with an incentive to update this information. That, in turn, will give you more ways to market to them in the future. Most email marketing platforms give you the flexibility to modify these workflows and test and tweak open, click and conversion criteria, as well as message timing.

Even as your welcome message workout concludes, you must maintain the strength you have added to your onboarding campaign. Revisit the benchmarks you established while getting "Ready"– find ways to augment your successes and improve any strategies that may have underperformed. Build a production plan for your team that includes any anticipated shifts in subscriber acquisition so you are maximizing the first impression with your new subscribers.

Product Page Abandonment

With marketing automation tools becoming more accessible and user friendly for marketers, it's easier than ever to automate emails that were once technically complex to launch and even more challenging to modify. Integrations between email service providers and e-commerce platforms are more seamless and turnkey than in years past, allowing marketers to focus message strategies on key areas along the purchase path that were once out of reach.

Shopping cart abandonment strategies have long been a tool that marketers can leverage to regain potentially lost sales. Having the shopper so close to submitting an order before abandoning the cart gives the marketer a plethora of data to utilize for an abandoned cart reminder strategy. The perspective shifts for both the shopper and the marketer when it comes to product page abandonment campaigns.

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The shopper's intent to purchase is much lower when simply browsing a product page compared to when checking out in the shopping cart. Marketers have less data about the shopper and the reasons for abandoning a product page can vary beyond common cart abandonment causes such as shipping costs, order totals and general anxiety about completing the purchase. While the realm of product page abandonment strategies is clearly muddier than other triggered messages, there are ways marketers can build an automated email strategy that enhances the shopping experience for the abandoner and helps recoup the sale.

Ready

Start by analyzing the product page. If you have not overhauled product pages in a while, it's worth speaking with your e-commerce platform provider to see if there are ways to enhance the product page experience. Features such as product photo galleries, zoomed images, 360-degree views, streamlined size/color selection, product videos, ratings, reviews and social dialog should be evaluated to see if product page abandonment could be decreased.

Benchmark product page abandonment rates for the past year. Factors such as site redesigns, heavy gifting periods and new product releases can contribute to spikes in abandonment that you should closely monitor as you launch your product page abandonment email strategy.

While you should not directly correlate causes or rates for shopping cart abandonment to product page abandonment data, it is worth factoring these behaviors to see if there could be influencers on the product page that cause abandonment later in the purchase funnel. Perhaps a running total of the order on product pages could help decrease sticker-shock once the shopping cart page is viewed.

Set

Be prepared to test and fine tune your product page abandonment email content. Unlike a shopping cart abandonment email, product page abandonment emails represent a less defined, lower level of commitment period during the purchase decision process. While you may be able to use data such as a photo of the product, price and shipping costs, the inclusion of this data in the abandonment email could be seen as intrusive by some shoppers who were just window shopping on your site. Conversely, a product page abandonment email that is too vague could confuse the shopper and provide no incentive to return to your site to continue shopping.

Build emails that cover the spectrum from those with minimal detail that are more reminder-themed to more detailed messages that include product specifics. This exercise is not to find the one email that works best. Instead, this multi-themed email test will help you understand how customers respond, based on the level of information presented.

Test the inclusion of related products within the product category; alternate products from the same brand or gift guides that could help customers shopping for products they are not familiar with.

Send

Many consumers may visit your site to quickly compare your price to your competitor leading to higer bounce rates on product pages. While the purchase intent on your site is low, the shopper's interest in buying the product may be high. This makes the timing of your product page abandonment trigger vital to the success of the campaign. While you may have the ability to send the message as soon as the product page is abandoned, it may be worth allowing a bit of a gap between abandonment and the email trigger. Test various windows of time, such as 45 minutes or up to 12 hours, to see if there is a specific time that shopper segments prefer. The various email themes should be balanced against these time frames. You may determine, for example, that your most loyal, frequent shoppers prefer a detailed email three hours post-product page abandonment. Or that casual shoppers prefer less product information in the email but are more likely to purchase if the email is triggered 45 minutes after they leave the product page.

To avoid over-mailing product page abandoners, you should consider your overall promotional email cadence and any other triggers they may receive. Based on response to the product page abandonment email, you may choose to suppress a promotional email that would usually be sent around the same time frame. Additionally, if the shopper returns to your site and takes another step down the purchase path by carting a product, the product page abandonment email should not be sent, as it is no longer relevant to their stage in the shopping process.

Closely monitor unsubscription and spam complaint rates for these emails. If you notice an increase, try adjusting content, timing or frequency of the emails. Sending a product page abandonment email each time a shopper leaves a product page will likely not go over well. The goal should be to enhance the shopper's experience, not to saturate them with marketing messages. Another action to combat increased unsubscription and abuse complaints is to include a prominent call to action in the top of the email giving the recipient the option to no longer receive product page abandonment emails in the future. Not only will this help you to keep the customer, but you will also gain insight into the profile of the shopper who is not interested in receiving such triggers.

About Bronto

Bronto Software provides a cloud-based marketing platform for retailers to drive revenue through their email, mobile and social campaigns. The leading self-service email marketing provider to the Internet Retailer Top 1000, Bronto is used by top brands worldwide, including Armani Exchange, Timex, Samsonite and Gander Mountain. The company is headquartered in Durham, NC with offices in London and Sydney. For more information, visit bronto.com.