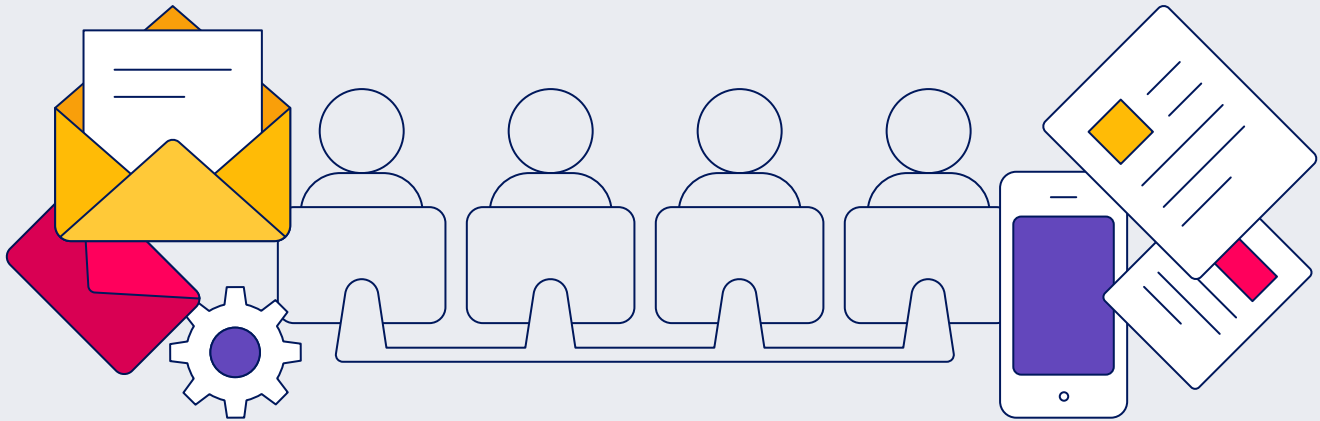


# Unboxing Must-Have Marketing Campaigns: Onboarding Series



In this ongoing series, we'll be “unboxing” must-have email campaigns vital to any successful marketing program.

We started with [Welcome Messages](#), so the next logical step is to focus on what comes next for new subscribers: Onboarding.

## Don't Assume You Have Them at Hello

Many brands send a welcome email to new subscribers or customers and stop there. But don't assume you “have them” at hello! By not following your welcome campaign with an onboarding series, you're missing a golden opportunity to solidify channel engagement, grow customer loyalty, and prompt first or repeat purchases.

Onboarding campaigns build on the strong foundation laid by your welcome campaign. In fact, brands which deploy a *Welcome Series* are essentially combining welcome and onboarding efforts into a single, multi-message campaign, and if this seamless transition from welcome to onboarding works for you, we highly endorse it.

Onboarding messages take the familiarity, appreciation, engagement and trust initiated in welcome messages to the next level, plus provide early response history and help you gather more data about your new subscribers. And as we know, the more data you have, the more personalized, customized and relevant your campaigns can be.



The verdict is in on the power of welcome and onboarding campaigns, which both fall under the category of triggered email made possible by marketing automation. According to Internet Retailer, merchants that send a welcome *series* see 13% more revenue than those sending a *single message*. Automated emails get 53% more conversion than stand-alone, broadcast campaigns, and open rates for automated email are 95% higher than for traditional messages.

Just as your welcome campaign should have stated goals and be intentionally designed to accomplish them, *each message of your onboarding campaign should have a specific objective*. Every email in the series you design has a unique job to do.

Keep reading to understand the five essential ingredients of all onboarding campaigns, as well as different approaches to message flow and cadence in this all-important email series.

## 5 Essential Ingredients for Amazing Onboarding Campaigns

### 1. Orient Newcomers

Ask yourself this question: is it safe to assume a new email subscriber or customer know their way around your brand? Your site? Your physical store? Probably not.

So, one of the first objectives of any good onboarding campaign is providing guidance and orientation to your world.

Just as you wouldn't assume a first-time visitor to a shopping mall, airport, or country to know the landscape, you shouldn't assume a new email subscriber knows yours. In fact, the broader your array of products and services, the wider the variety of benefits you offer, the more orientation your newcomers will need.

In those instances, longer onboarding series (5+ messages) are completely justifiable and useful because it takes at least that much messaging bandwidth to incrementally communicate a benefits roadmap in a way that's clear and logical.

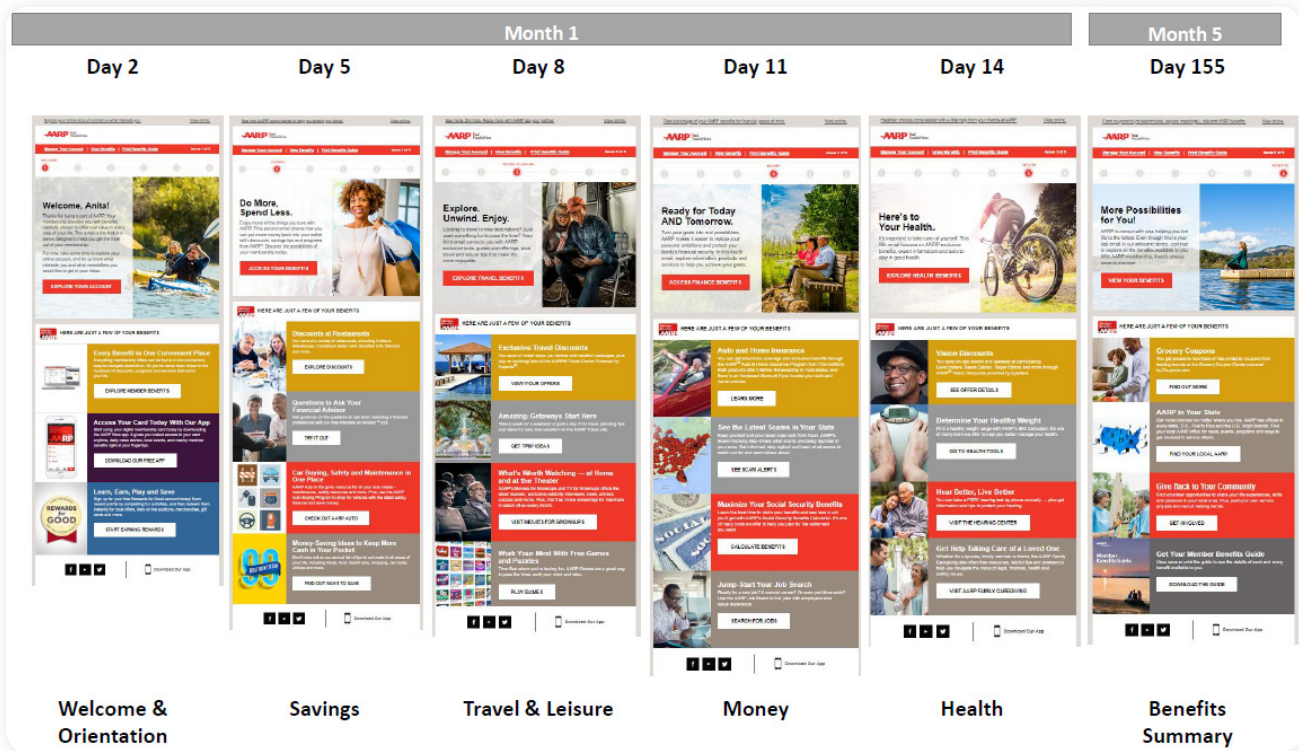
AARP is a perfect example of a brand that justifiably needs a longer onboarding series. The organization offers a broad and deep array of member benefits ranging from insurance to financial planning to travel to health and wellness, plus articles, videos and other content in each of these categories.

There's no way they could possibly cover all that ground in a single welcome message, and they need to ensure new members understand the full breadth of benefits and take advantage of them.



That’s why their 6-message onboarding series (sent after a new member welcome email deploys) takes its time detailing member benefits and content category-by-category, even following-up nearly six months later with a final message to make sure subscribers get all they need.

A brilliant move and a good reminder that **if your onboarding series is longer and content-heavy like this, you’ll want a capstone message at the end to sum things up.**



AARP Onboarding Series

## 2. Build Cross-Channel Connections

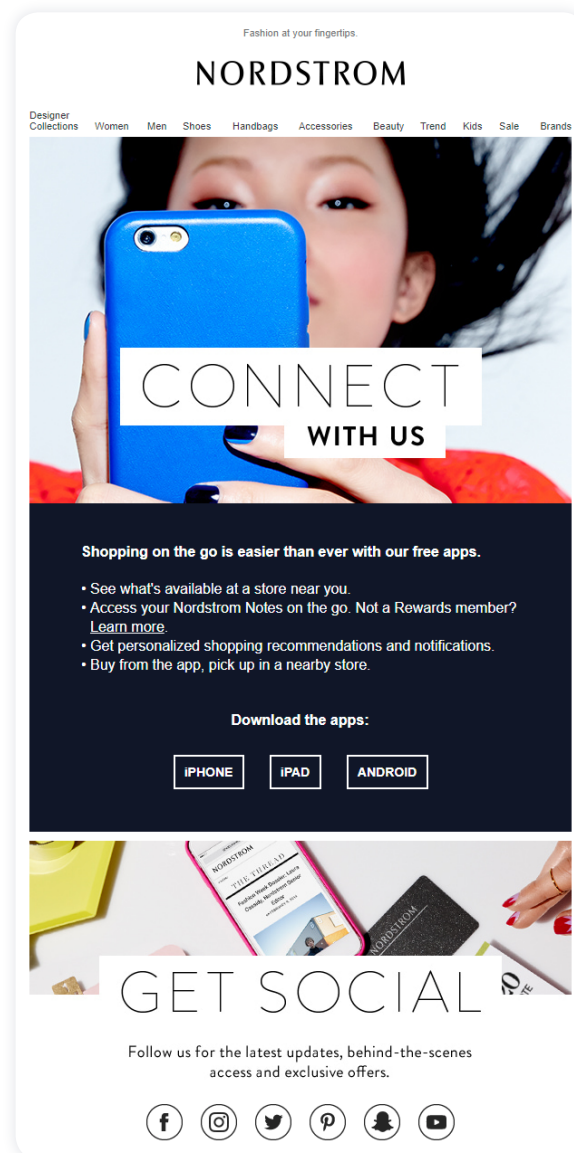
Your onboarding series is your up-front chance to establish connections in other digital channels. You’ve welcomed your new member to email—now invite them to connect in related channels, especially social and mobile.

If you acquired your new subscriber through the web, invite them to download your mobile app if you have one. Whether they came to you through mobile or web, invite them to connect on social media.

The following example from Nordstrom is an excellent illustration of inviting both mobile app download and social network connections.

In case you haven't heard it before, a multi-channel customer is always worth more than a single-channel customer (cross-channel merchants have known this for years, which is why they still send print catalogs despite having robust e-commerce sites and retail store footprints).

The same holds true online: an omni-connected subscriber, user or customer is more valuable than one limited to a single channel, because if you lose a connection in one channel, then it survives in the others.



Nordstrom's "Connect With Us" Cross-Channel Onboarding Email

### 3. Enable Behavioral Profiling

One of your onboarding campaign's superpowers is delivering an early-stage look at subscriber response behavior and preferences. Because of the multi-message nature of an onboarding series, it provides *multiple* opportunities for recipients to open, click-on, and convert from email, which means you'll rapidly get a look at the product/service/content categories each person is most interested in.

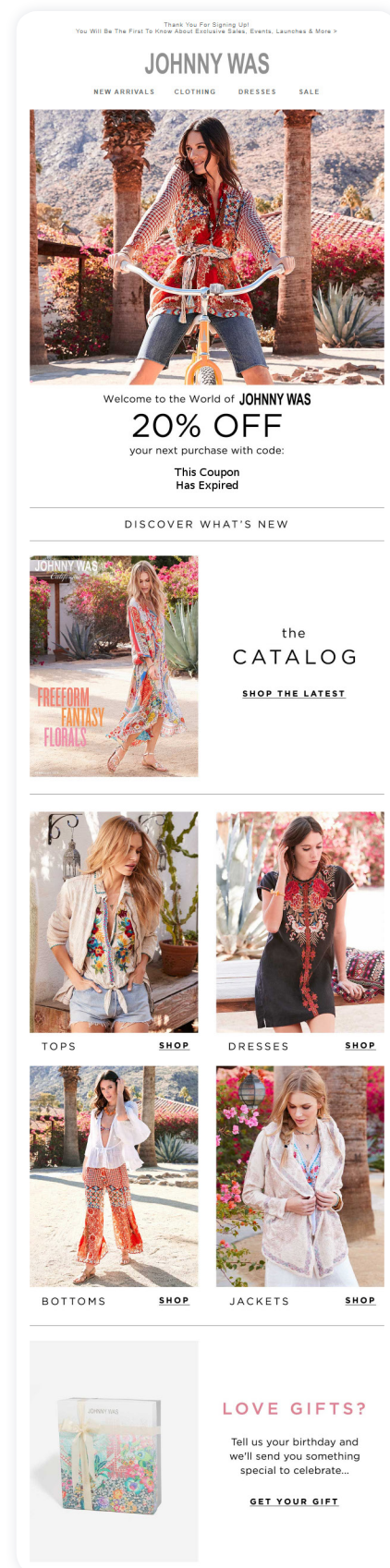
This, in turn, enables you to tailor future messages on a 1:1 basis, specifically to individual subscriber interests. It also enables automation so you can kick-off nurturing or drip series most closely aligned with their interests.

This practice is known as behavioral profiling—meaning you allow your email subscribers to show you through their open, click and conversion behavior what resonates with them. Use actual recipient behavior to guide your sending and targeting decisions as you go forward.

But, don't limit behavior tracking to just email opens and clicks! Be sure to track behavior all the way through to web and/or mobile site visits and even offline transactions.

Take a look at the following message from women's retail apparel brand **Johnny Was** (the second in their 3-part onboarding series). They offer four distinct product category areas to explore—Tops, Dresses, Jackets, and Bottoms—plus links for the catalog and for gifts.

They're likely using this data to discern subscriber preferences and patterns, which ensures, for example, that the next time they have a sale on dresses they can selectively target those who clicked on dress pages or better yet, bought a dress.



Johnny Was Onboarding Email With Product Categories

## 4. Gather Self-Reported Data

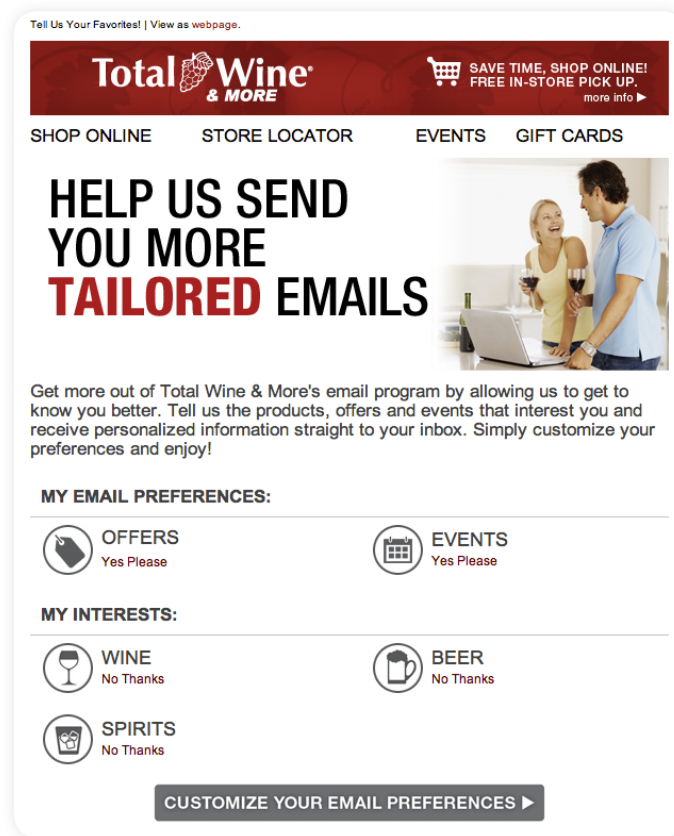
While behavioral profiling provides *inferred* data—a helpful directional indicator—what’s even more powerful is *voluntarily self-reported data* subscribers offer up on their own.

If you allow data gathering through a subscriber preferences or customer profile center, make sure one of your onboarding steps invites new subscribers to tell you more about themselves and what they like.

Psychologically, this leads to a positive *mirroring effect*: you ask what someone wants, they tell you, you deliver according to their request, and they feel validated and rewarded which makes them more receptive and trusting to ongoing offers and invitations to engage.

See how Total Wine & More does it in the second message of their new email subscriber onboarding series below?

This is exactly what we as marketers want, so **don’t miss the opportunity to proactively ask new subscribers to tell you their wants and needs** right from the get-go.



Total Wine & More “Personalize Your Preferences” Email

## 5. Include a Bounceback/First Purchase Offer

Naturally, if you've already bought from a site like eBags, their new subscriber welcome and onboarding messages aren't going to be aimed at getting you to make a first purchase (the common case when people sign up for email to get incentives or enter a sweepstakes, etc.), but they should capitalize on the chance to get you to make a follow-up purchase.

An onboarding series is the perfect opportunity to include either a bounceback or first purchase offer. If the new subscriber hasn't bought yet, then make sure your final message (or a creative block present in the template for the entire series) includes an intro offer inviting the first purchase.


If the new subscriber did buy, give them an offer to "bounce back" and buy again, but make it really worth their while. An effective bounceback offer is usually more lucrative than your typical customer acquisition offers and isn't the type of deal or discount you'd use every day.

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**eBags**  
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**eBags**  
Classic Packing Cubes - 6pc Sampler Set

**eBags**  
Hyper-Lite Packing Cubes - Super Packer 5pc Set

*eBags Bounceback Offer*

## Onboarding: Sequencing Approaches

Now that you know the five essential ingredients for an amazing onboarding series, you have a lot of decisions to make. The nature of your business should also inform what you include and your message cadence.

Here are three sequencing approaches to consider:

### ✓ Editorial (Content-focused) Cadence

Have a lot to communicate? Complicated business to understand? And you have a lot of content assets to leverage? Much like AARP, you might structure your onboarding series with an editorial flow.

Progress from one topic to the next, but set the stage up-front (managing expectations is important in any email series to ensure people stay with it until the end) so subscribers know what's coming and for how long.

### ✓ Training/Usage Cadence

A common approach used with mobile apps and in B2B, a training-focused onboarding cadence walks new users through getting started, understanding features, exploring capabilities, and explains how to get help in a step-by-step approach.

For example, banks and investment companies often need to walk newcomers through account set-up and different levels of online functionality like mobile banking, bill-pay or trading and forecasting tools. Dating and networking apps make sure users understand and explore all platform features, especially ones that are easily overlooked. SaaS and software providers provide online training and even webinars. If you have great educational content, then promote it in this cadence.

### ✓ Essential Ingredients Cadence

If neither of the above is necessary to get new subscribers fully on board, default to a cadence mirroring the above essential ingredients, making sure you have a clear goal for each message and track engagement throughout.

Front-load your series with messages serving your most important goals (cross-channel connections? Data gathering?) and be sure to wrap up with a high-value offer to entice that first or repeat purchase.

**Now that you know not to stop welcoming new subscribers with a single message, what are you inspired to include in your onboarding efforts?**



## 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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