

Unboxing Must-Have Marketing Campaigns: Customer Milestones



It's a [well-documented fact](#): Brands that send personalized birthday and anniversary emails generate more revenue than brands that only focus on mass-produced mailings.

However, this comes with a caveat: The research is over ten years old.

Ten years ago, there wasn't the [personalization technology](#) that we have today. In 2020, consumers expect more—meaning brands have to do more than send a celebratory message once a year to get the attention, revenue and loyalty they're looking for.

That's why for this edition of Unboxing Must-Have Marketing Campaigns, we're going to dive into a topic that brand marketers could use a new perspective on: customer milestones.

We'll cover:

- **Why customer milestones need to go beyond birthdays and anniversaries**
- **The three essential ingredients you need to build a stellar milestone campaign**
- **Advanced cross-channel tactics to give your messaging extra oomph**

Let's get started.

Why Brands Need to Do More Than Send a Birthday Message

Before we dive in, we want to define how we think about customer milestones at Iterable.

A customer milestone is an event that celebrates the customer's progress towards a goal they've set for themselves.

So **birthdays** celebrate a customer's progress towards living another year.

And **anniversaries** celebrate an additional year of a customer's patronage with a brand.

However, **birthdays and anniversaries only happen once a year**. If B2C marketers are only interacting with customers on their birthday or anniversary without any other personalized communications in the remaining 364 days, they probably aren't getting the ROI they're looking for.

In fact, brands can go further with milestones to get a customer's attention. But how?

How Identity Relates to Customer Milestones

If brands want to get the ROI they desire with a milestone campaign, they have to understand the basics of how individuals form their identity.

Identity, [according to psychologist Shahram Heshmat](#), "relates to [an individual's] basic values that dictate the choices we make [...] these choices reflect who we are and what we value."

An identity changes throughout an individual's lifetime, so while it might seem like a great idea to blast your list with a once-a-year birthday message, the individual might have already moved on from your brand, which can send your milestone email straight into the trash.

However, there's an opportunity here. In addition to birthdays and anniversaries, there are two types of customer milestones that can be celebrated.



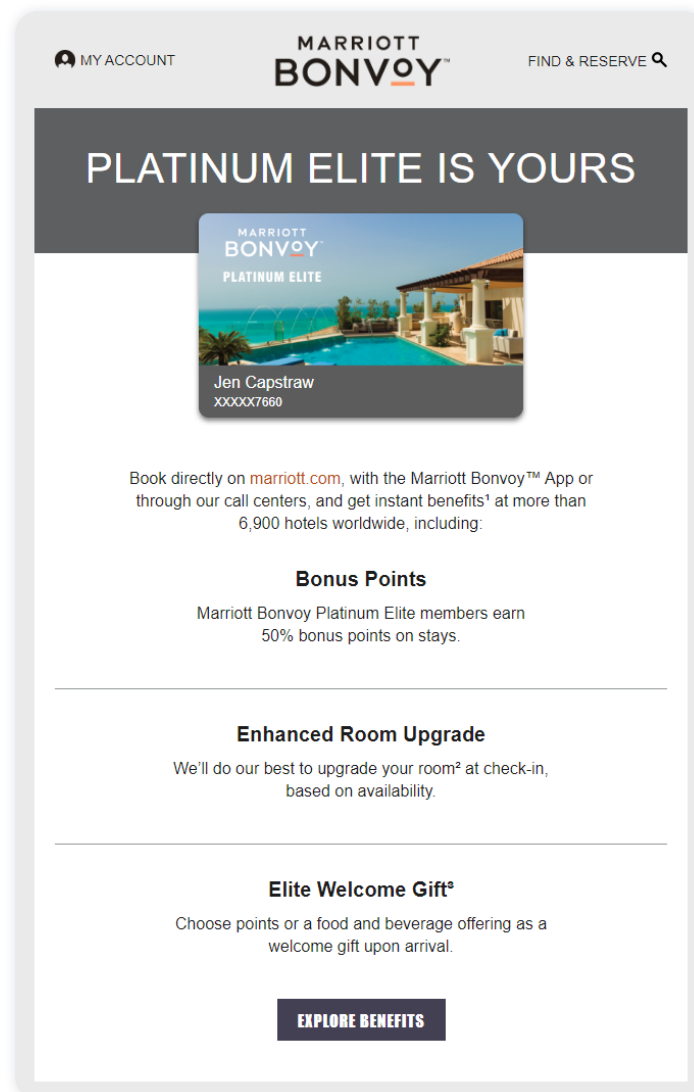
1. Through a Loyalty or Rewards Program

One way brands can celebrate customer milestones is through a loyalty or rewards program.

For instance, hotel chain Marriott already offers a loyalty program to frequent travelers. “Levels” are assigned based on an individual customer’s spending activity and the “milestone” is when a new level is reached.

Celebrating this milestone accomplishes a few things:

- **Affirms a customer’s elite status as it relates to Marriott**
- **Makes the customer feel good about their achievement**
- **Informs them of the new perks they receive as a result of their loyalty**



An email from hotel chain Marriott notifying a customer on their achievement of Platinum Elite.

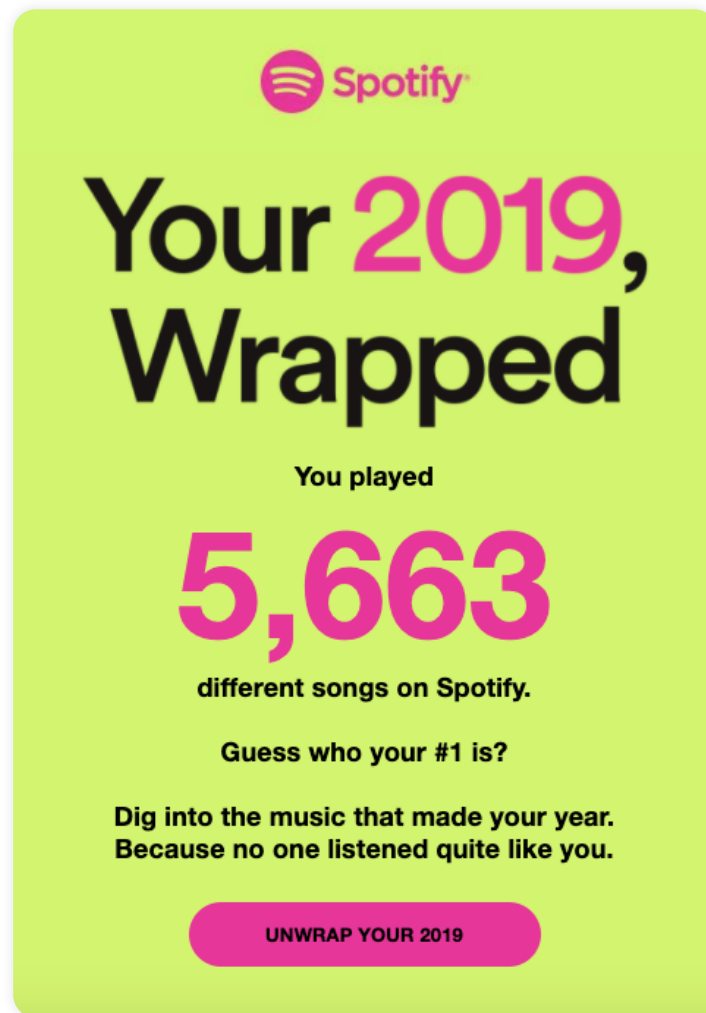
2. Activity Tracking

Another way brands can celebrate customer milestones is by compiling what a customer did over the course of a year.

So, for example, music streaming application Spotify analyzes each individual profile's listening habits for trends over the course of the year and creates new playlists for them.

The type of music someone listens to is incredibly personal, so this milestone email affirms the listener's taste in music, alerts the listener that there are customized playlists in their library, and (hopefully) gets them to continue streaming music.

Now that we have a few more examples on how brands can celebrate customer milestones beyond the birthday and anniversary, let's break down the three essential ingredients a marketer needs to have before they build a milestone campaign.



A milestone email from Spotify detailing a listener's top songs of 2019.

3 Essential Ingredients You Need to Build a Milestone Campaign

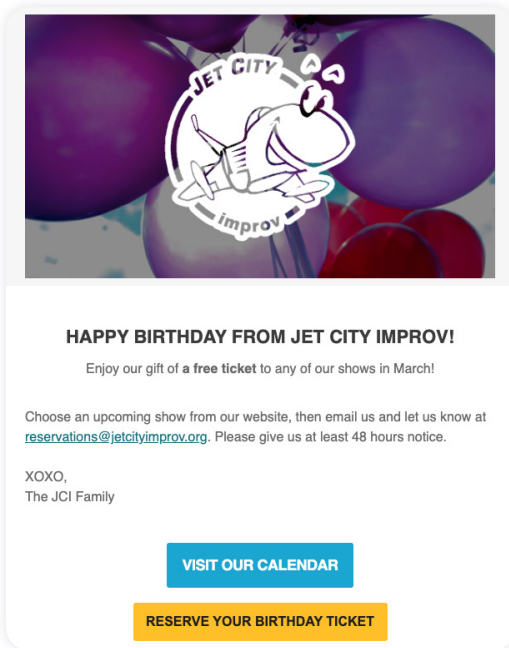
1. A Milestone to Celebrate

To build a milestone campaign, brands need to know exactly what customers like to celebrate.

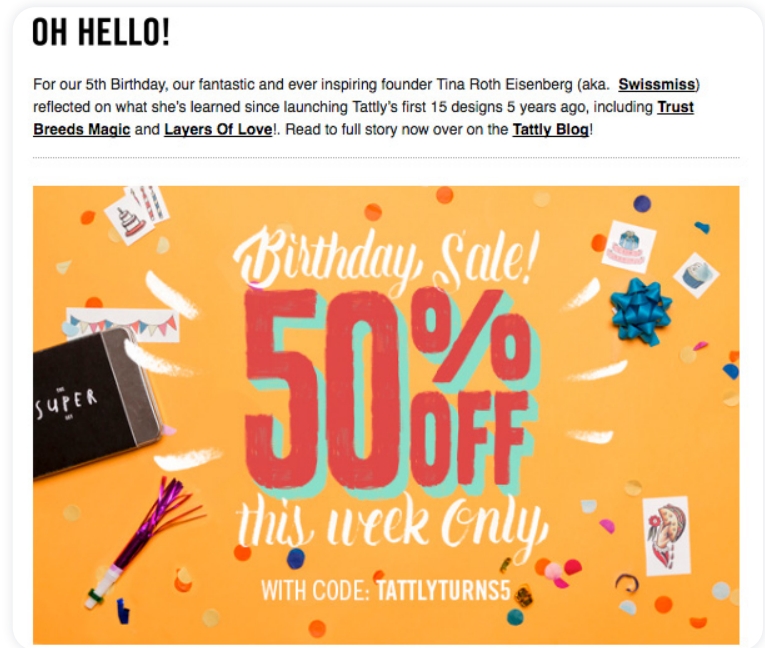
Luckily, you have lots of options to choose from.

Most people enjoy their birthday, so it's not too much of a stretch to send them an offer as a birthday gift, like this email from a Seattle-based improv comedy group.

But it doesn't even have to be the customer's birthday. It could be that a business milestone was reached, like this 5-year company "birthday" email from temporary tattoo retailer Tattly.



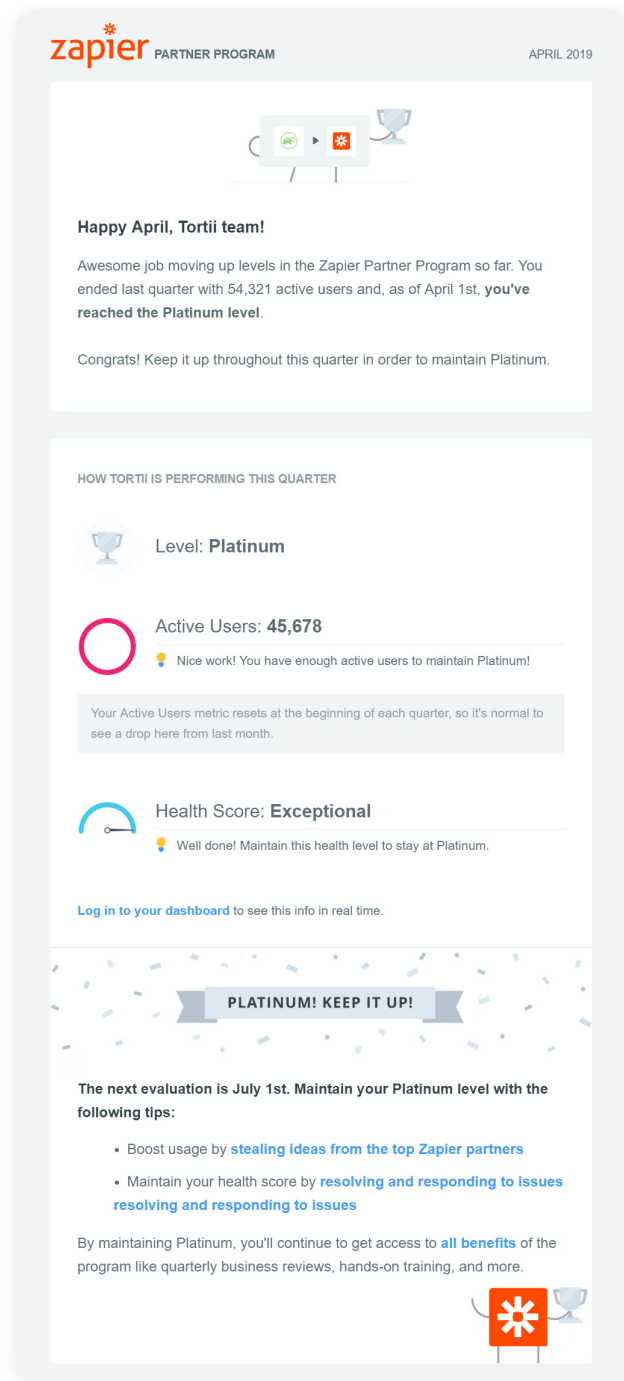
A Seattle-based improv group offers email subscribers a free ticket during their birthday month.



Tattly tempts their email subscribers with a 50% company birthday sale.

But if your brand chooses to track an activity, like software app Zapier does for their partner program, you'll have to establish what the "levels" look like—and decide what information to add or omit in your milestone email.

Once you choose the milestone your brand wants to focus on, you need to make sure you have the right data in place to support it.



A quarterly milestone email from Zapier's Partner Program.

2. Data to Support that Milestone

Next, [brands need data](#) to support celebrating that milestone.

While it may be enough for an individual to use Facebook or Google Calendar to manage their contact's birthdays, brands can have up to hundreds of millions of contacts in their databases.

Meaning? They have to get really good at automating some of their messaging, otherwise email teams would be swamped with sending birthday cards all the time.

To do this, **brands have to collect and store relevant customer data**. They can do it through one of two ways: **voluntarily or through tracking user behavior**.

An example of voluntary data is when brands offer birthday gifts in exchange for customer information, like this pop-up form and birthday email used by retailer Madewell.

✕

WANT INSIDER PERKS?

If you like birthday gifts, free personalization, free shipping and other fun stuff, become a Madewell Insider right now.

First Name Last Name

Email Address

Create a Password

Minimum 8 characters, including at least one uppercase letter, one lowercase letter and one number.

GET IN ON SOME REALLY GOOD EMAILS:

Women's Men's Both

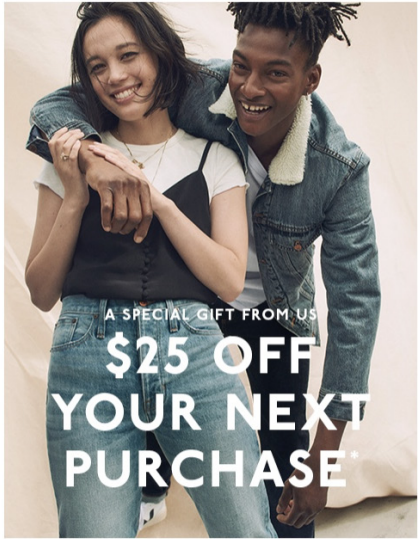
SIGN UP

To see how we may use your information, take a look at our [privacy policy](#).

Once Madewell.com visitors sign up with an email address and password, users are sent to an account settings page to insert their birth month and day.

MADEWELL
INSIDER

HAPPY BIRTHDAY TO YOU



A SPECIAL GIFT FROM US
\$25 OFF YOUR NEXT PURCHASE

Go ahead, *treat yourself*. Just present this email at the register in store or enter the below code at checkout online (but do it soon, the code expires at the end of the month).

ENTER
06B-D9QNVPHXS

START SHOPPING

A birthday email from retailer Madewell.

Alternatively, brands can collect data on a customer by looking at what they purchased or did on a website or app and generate a milestone that way.

For example, the New York Times collects data on what subscribers read and click in order to generate the following anniversary email.

Brands can't run a milestone campaign like Madewell's or the New York Times's without accurate data. If you're a marketer considering one for your brand, take the time to understand what sources of data you have access to before embarking on the email design process.



The New York Times sends an anniversary milestone email to each of their subscribers detailing what they read over the year.

3. A Relevant Offer

Wishing someone well on a milestone is a nice touch, but the best brands always include a gift for the customer on their special day.

However, this can backfire if the offer isn't personalized for the individual's preferences.

Luckily, [psychology research Robert Cialdini](#) has the solution. For maximum impact, gifts should be:

1. **Meaningful and unexpected**—as in, there needs to be an element of surprise. A good example is when a waiter at a restaurant brings out free dessert after dinner. It's a nice gesture to the customer (and most likely will result in a higher tip for the waiter).
2. **Customized**—as in, the benefit is based on their environment, likes and dislikes. So for instance, if someone buys their employee a Starbucks gift card and that employee doesn't drink coffee, the gift suddenly loses its meaning.

One brand that meets these two criteria is BarkBox, who celebrates their canine customers' birthday or adoption day with a fun email (and an offer to add a special treat to the regularly scheduled subscription box).

When's Winnie's birthday?

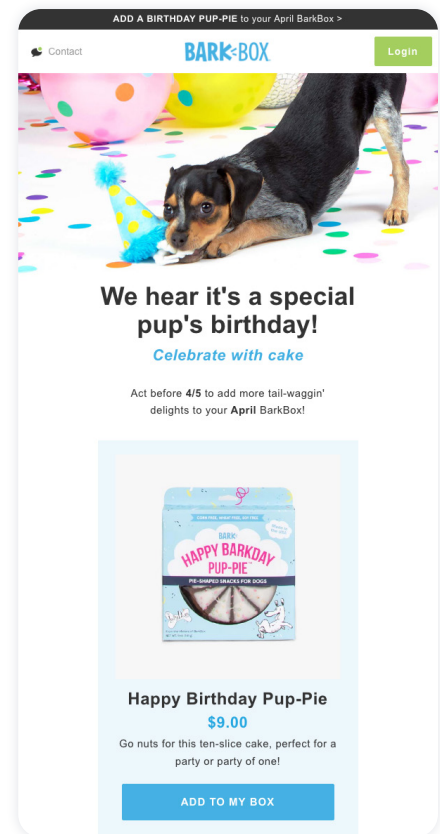
Or adoption day. We want to help celebrate their special day!

Month Day Year

[Continue](#)

[Or, skip this step](#)

When customers sign up for BarkBox, the intake form asks for their dog's birthday or adoption day.



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

Another brand that gives a relevant offer is cosmetics retailer Sephora. If customers are part of their Beauty Insider loyalty program, they get to add a free birthday gift to their next purchase and receive recommendations for additional products based on their astrology sign.

Sephora is well-known in the beauty industry for their [generous return policy](#), so offering a cosmetics mini-set as a birthday gift helps Sephora advertise new products—and allows their loyal clientele try new products before they purchase larger versions.



Sephora's birthday email to members of their Beauty Insider loyalty program.

Beyond Basics:

4 Advanced Cross-Channel Tactics for Milestone Campaigns

Once you've chosen a milestone, collected the data and nailed down the offer, you're all set to build a milestone email campaign. However, you may be wondering how you can enhance them with additional cross-channel messaging.

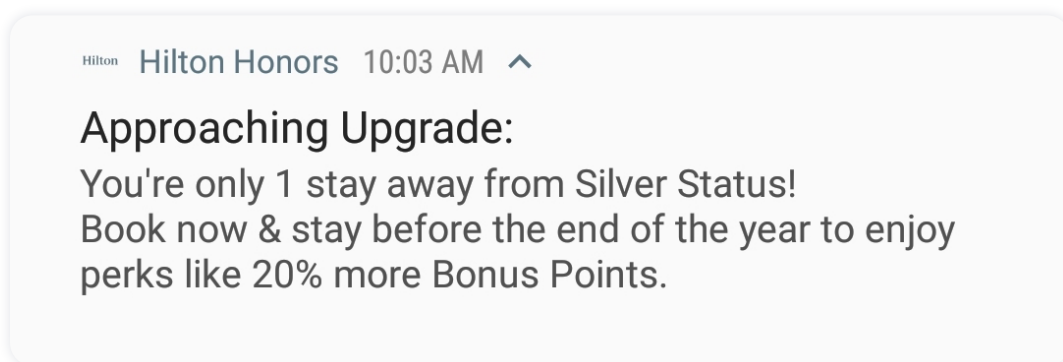
Here are a few ideas.

1. Mobile Push Notifications

Brands don't always need to send a milestone email to get their point across. Sometimes a short mobile push message is all it takes to celebrate a customer milestone, like the following example from Hilton.

This push notification does two things: reminds the customer of their current status and what they have to gain if they book one more trip.

Any points-savvy customer would take advantage of this, especially if it means a last-minute vacation at the end of the year.



A mobile push notification from the Hilton Honors program.

2. Retargeting

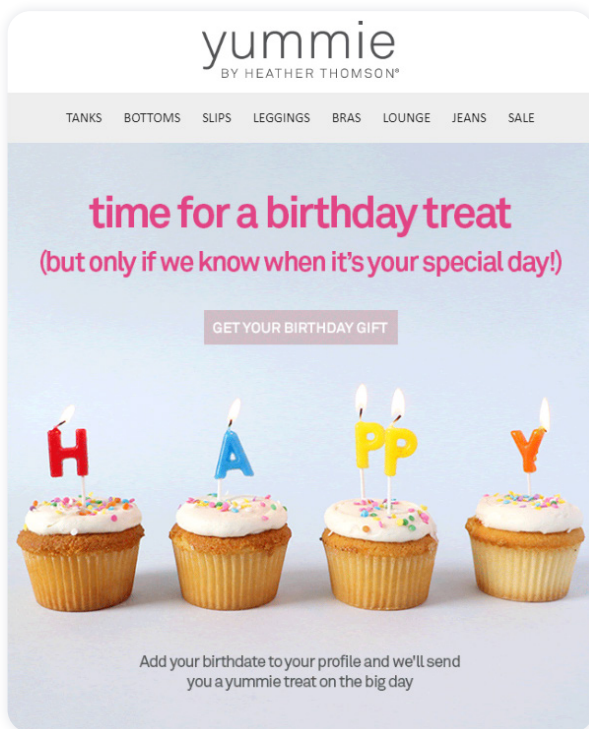
Sometimes the hardest part about sending a milestone campaign is getting the data, especially if it's voluntary.

Shapewear brand Yummie knows this, so they send customers an email asking for them to input their birth date in their profile.

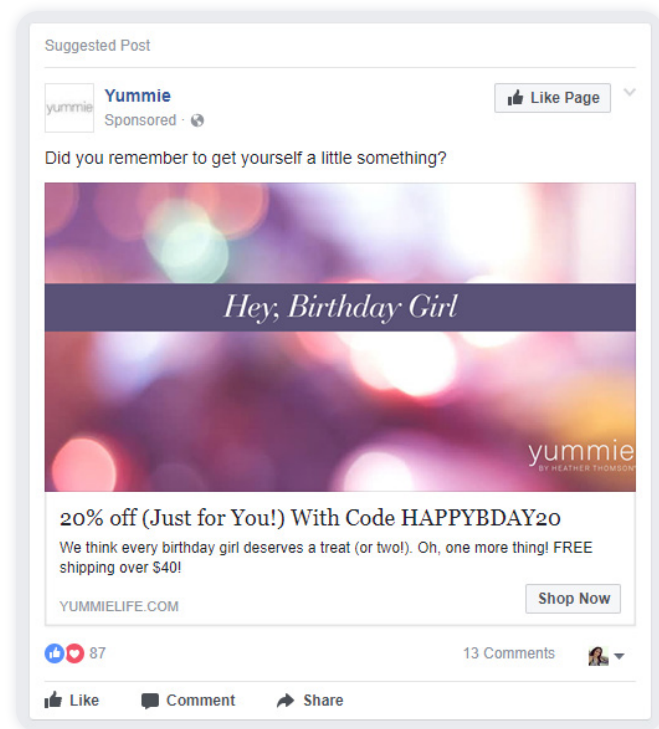
There's always the chance that a customer will ignore an email. But not all hope is lost.

Yummie tries one more time by utilizing Facebook ads to retarget the customer and remind them about their special birthday offer.

It's never easy figuring out how a brand can delight customers using Facebook ads and Yummie does so in a creative fashion that perfectly compliments their milestone email campaign.



Shapewear brand Yummie sends an email asking customers to add a birth date to their profile.



Yummie utilizes Facebook retargeting to remind customers to add a birth date to their profile.

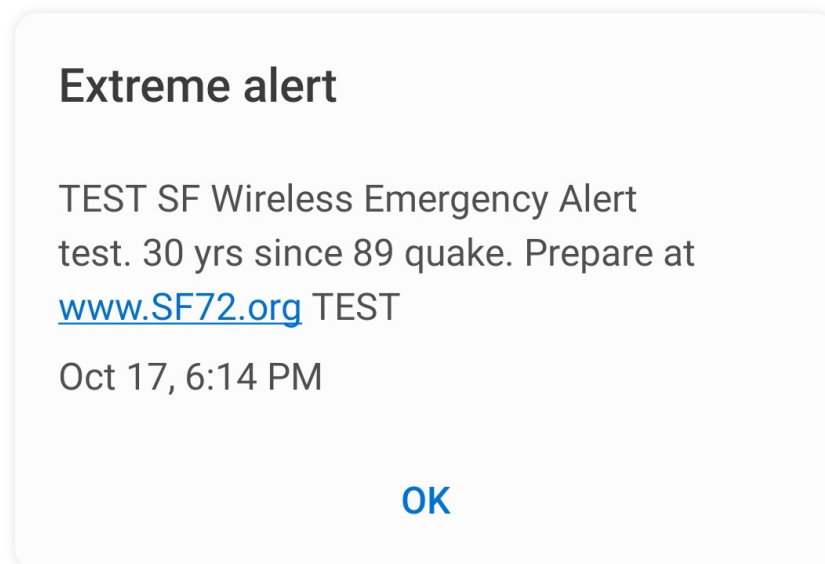
3. Text Messaging (SMS)

Though a lot of our examples cover milestones like birthdays, product anniversaries, and loyalty program status, remember that a milestone for a brand might be different than say, a milestone for a nonprofit.

Meaning organizations have even more liberty with how they define a “milestone.”

For instance, it’s been 30 years since the [1989 Loma Prieta earthquake](#)—a significant milestone for anyone who was located in the Bay Area when it happened. So for the 30th anniversary, the City of San Francisco got creative.

Even though it was just a test, it caught the attention of Iterable’s team—and hopefully prompted recipients to [check out the website for tips](#) on how to get prepared.



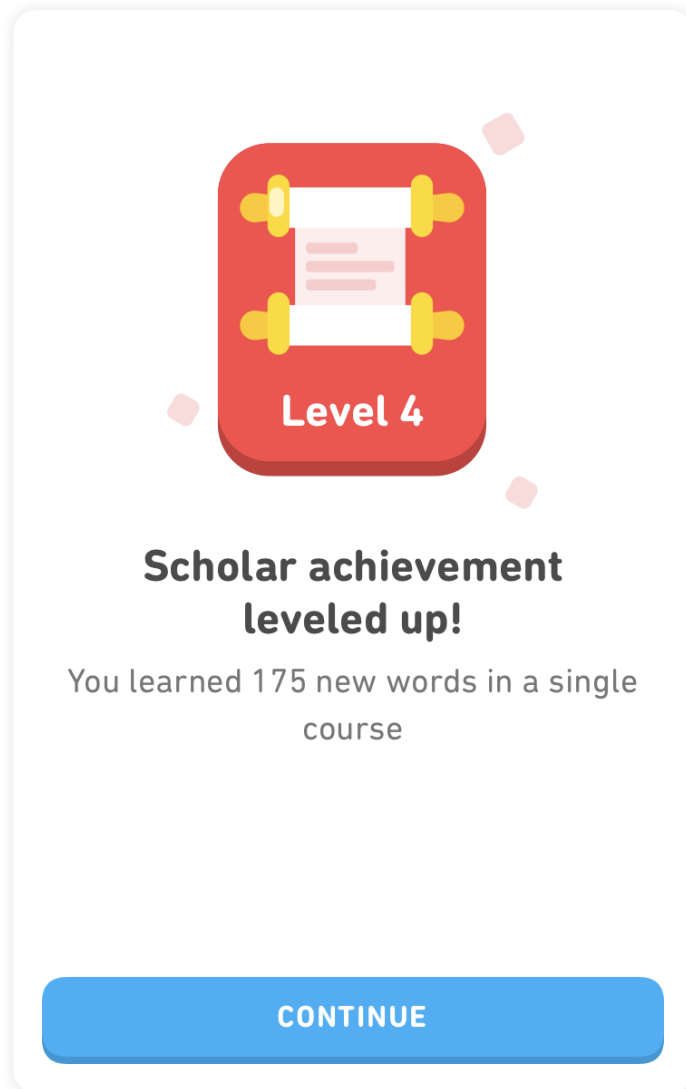
An SMS message from the City of San Francisco “celebrating” the 1989 Loma Prieta earthquake.

4. In-App Messages

If your brand has a mobile app, it may be useful to send celebratory messages to users while they are using it.

Take for instance, language education app Duolingo. After students finish a lesson (or three), they are sent a series of congratulatory messages for what they've accomplished.

The benefit of using in-app messaging is that students feel proud and continue to log into the app to do their lessons (and inevitably, get more congratulatory messages).



Duolingo celebrates a student's milestone of learning 175 new words.

A Quick Recap on Milestone Campaigns

Regardless of what your brand chooses for a milestone, remember these two things:

1. **It's important to celebrate your customers' victories throughout the year—not just during a birthday or anniversary.**
2. **The most effective milestones are the ones that affirm a customer's identity.**

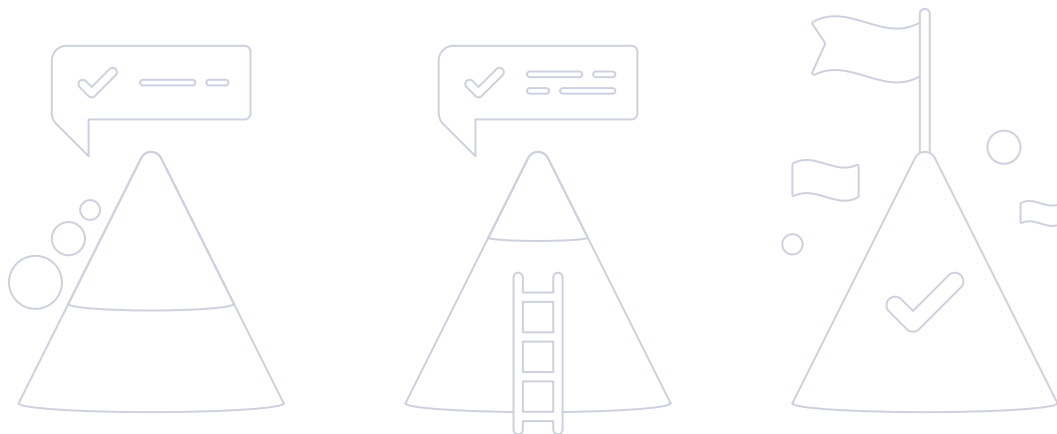
If you're just getting started with milestone campaigns, remember that you need these three essential ingredients for the best results:

- **A milestone to celebrate**
- **Data to support that milestone**
- **A relevant offer**

Once you master the essentials, you can get creative with these four advanced tactics:

- **Mobile push notifications**
- **Retargeting**
- **Text messaging (SMS)**
- **In-app messaging**

Now that you're an expert on how to build a milestone campaign, what are you going to do to stand out from the crowd?



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:

[REQUEST DEMO](#)

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