ITERABLE

Workflow Building

PERSONALIZATION PLAYBOOK

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You're reading the third part of Iterable's Pillars of Personalization Series, which covers four topics every growth marketer needs to understand to create empathetic and relevant messaging to customers.

Despite its aspirational name, marketing automation isn't always so automated.

According to the 2020 Litmus State of Email Workflows, most marketing teams spend up to two hours on each production element, for an average total of 2+ weeks to create *one single email*.

At Iterable, we believe there's a way to take back some time and spend it on the most valuable part of your email process: Creating personalized messages that resonate with your customers.

So for the third part of the *Pillars of Personalization* series, we're going to break down the components of building a **customer messaging workflow** in your email service provider (ESP).

Once you read this guide, you'll learn:

- **Why lifecycle maps don't always translate into your email service provider**

- **The four building blocks of a customer messaging workflow**

- **How a floral subscription business in the U.K. doubled its number of reactivations using a growth marketing platform like Iterable**

LET'S GET STARTED.
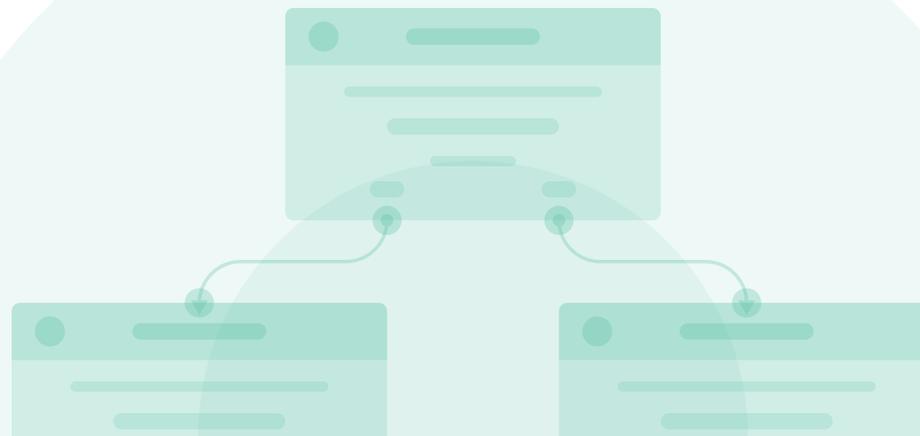
Why Lifecycle Maps Don't Always Translate Into Your Email Service Provider

Before we discuss the process of building a customer messaging workflow, let's review what was discussed in the second installment of our *Pillars of Personalization* series.

We discussed the importance of the brand lifecycle and how to enhance it through the perspective of a customer in four easy steps:

1. **Define the character.**
2. **Search for the conflict.**
3. **Position your brand as "the guide with a plan."**
4. **Call the customer to action.**

Assuming you went through a variation of the process we recommend, you should end up with lots of ideas for messages that will resonate with your customer journey.

However, your vision may not align with the email service provider (ESP) you're using. According to Garin Hobbs, director of deal strategy at Iterable:

Many ESP solutions, particularly legacy platforms, consider the lifecycle in an overly linear and sequential way, forcing customers down predetermined paths that often don't keep pace with the more dynamic and elastic human engagement patterns of the present.

In other words, when it's time to translate all of your imagined workflows into your email service provider (ESP), you may discover its technological limitations.

Growth marketing platforms like Iterable allow marketers to transfer their lifecycle maps directly into a messaging workflow. However, we know that not every marketing team has the resources or buy-in to change the tools in their stack right away.

It's essential to continually evaluate your marketing stack to give you the flexibility to build a messaging workflow that's individually tailored for each customer.

The Four Building Blocks of a Customer Messaging Workflow

Now that we understand that some ESPs have limitations to translating your workflow let's talk about what you can do when building a **customer messaging workflow**, which we define as the written communications between your brand and a customer.

There are four building blocks of a customer messaging workflow, which include:

1 Enter/Exit Criteria

2 Timing

3 Actions

4 Filters

To make it easy to follow along, we'll walk through a hypothetical example of a reactivation email workflow from Iterable customer **bloomon**, an online floral service based out of the United Kingdom.

Enter/Exit Criteria

The first building block is Enter/Exit criteria, which is how a user enters and leaves the customer messaging workflow in question.

Before we dig into the specifics, let's briefly recap the first installment of our *Pillars of Personalization* series on user segmentation. We covered the four steps of building and testing out your brand's perfect audience segment, which are:

1. **Reflect and visualize your ideal customer**
2. **Select your data points**
3. **Build and send a test campaign**
4. **Report progress weekly**

So assuming the bloomon team followed similar steps, they would discover that their perfect audience segment would consist of customers who have made a one-time purchase in the past—but have yet to sign up for a subscription plan to regularly receive flower arrangements.
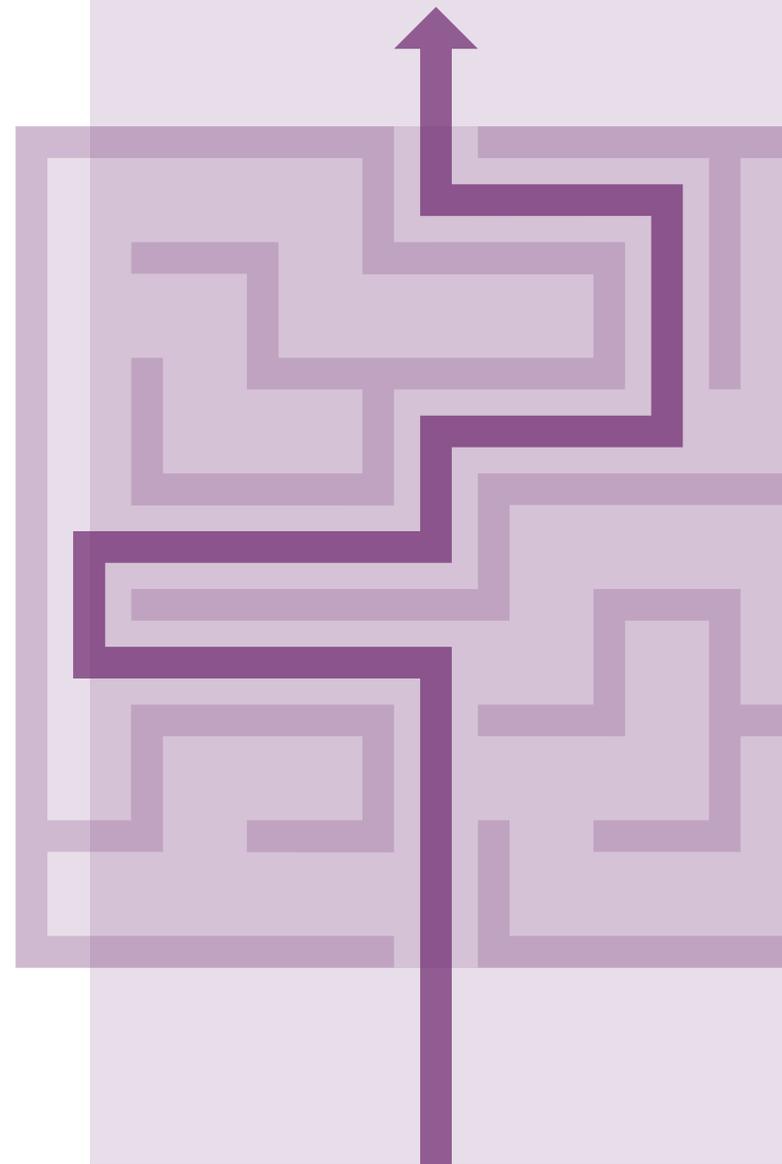
Since bloomon is using Iterable, the company can use a trigger in its reactivation workflow that only brings in users who:

- **Made a purchase but haven't returned in 90 days**

- **Opened or clicked on a promotional campaign**

- **Viewed the flower subscription page on bloomon's website**

However, no customer wants to receive reactivation emails forever. So it's just as important to determine when users will leave or exit the reactivation workflow. In this case, bloomon may set a trigger that removes users from the workflow when they:

- **Unsubscribe from promotional emails or the list altogether**

- **Fail to open the last five emails**

- **Have little to no activity on bloomon's website**

The number of workflow triggers can be endless, based on your ESP's ability to incorporate triggers from external data points, like adding an item to a shopping cart or making a purchase. But regardless of the tool, it's always a good idea to determine how users are going to enter and exit your messaging workflow.

Timing

You've heard ad nauseam that the "holy grail" of marketing is to send the right message to the right person at the right time, so it's no surprise then that the second building block of building a customer messaging workflow is Timing, which includes:

The Send Time of Messages

The Delay Between Messages
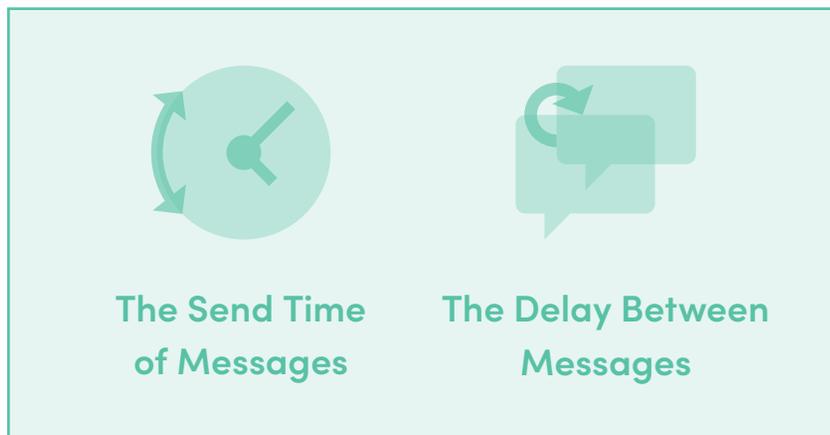
Let's break them down, one by one.
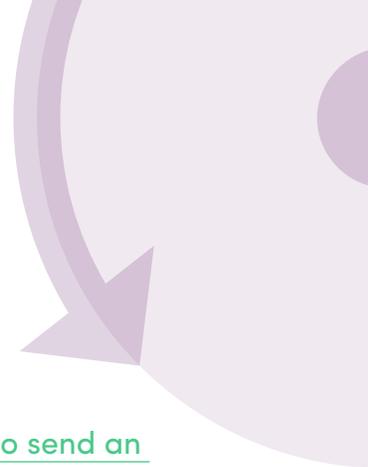
The Send Time of Messages

While it's tempting to rely on studies about the best times to send an email, no one knows the customer as they know themselves.

Some customers open their emails in the morning, while some read them late at night. Everyone has a preference and being able to personalize a message's timing could be the difference between an engaged customer and a churned user.

For example, we know that bloomon wants to reactivate customers who made a one-time purchase in the past. However, there's a high likelihood that a user in this particular audience segment would ignore these emails.

Instead of deciding on a time for everyone in this segment and hoping for the best, brands with a modern ESP can utilize a feature like Send Time Optimization, which looks at each customer's level of engagement within the workflow and selects the time based on past campaign performance and user behavior.

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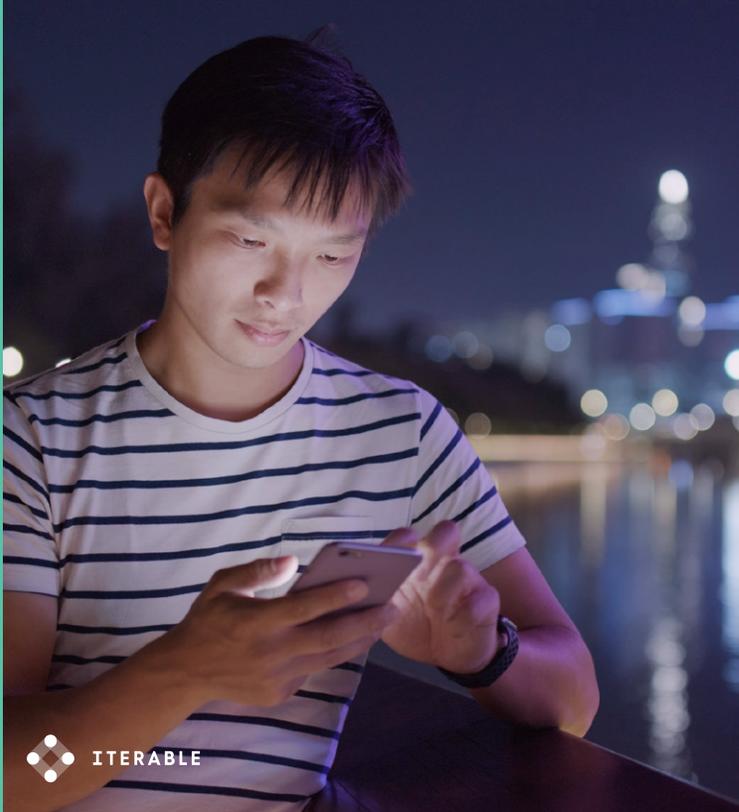
The Delay Between Messages

Another part of timing is the delay between messages in a workflow. Given that 74% of consumers are overwhelmed by the number of emails they receive, it's in a marketer's interest to intentionally space out the messages they send out.

However, there are also other considerations a brand has to make when mapping out its workflow regarding delays. So in the case of bloomon, a reactivation workflow may involve an incentive with an expiration date.

While the marketing team could rely on the standard delay of 72 hours between messages, bloomon may want to increase the number of emails sent to a customer. In this case, it's better to use a feature like delay using time from a property to increase messaging frequency, based on the limited amount of time to take advantage of the offer.

Now that we understand how to handle timing when building out your customer messaging workflow let's move on to the next building block.
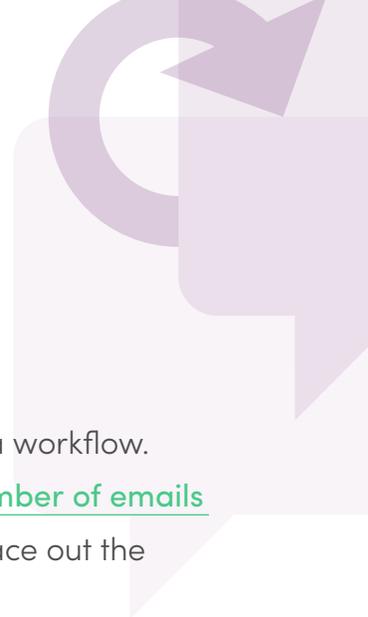
Actions

The third building block of building a customer messaging workflow is Actions. Actions are what is sent, revised, or edited within a message or user profile.

There are three types of actions, which include:

Send Actions

User Actions

Subscription Actions
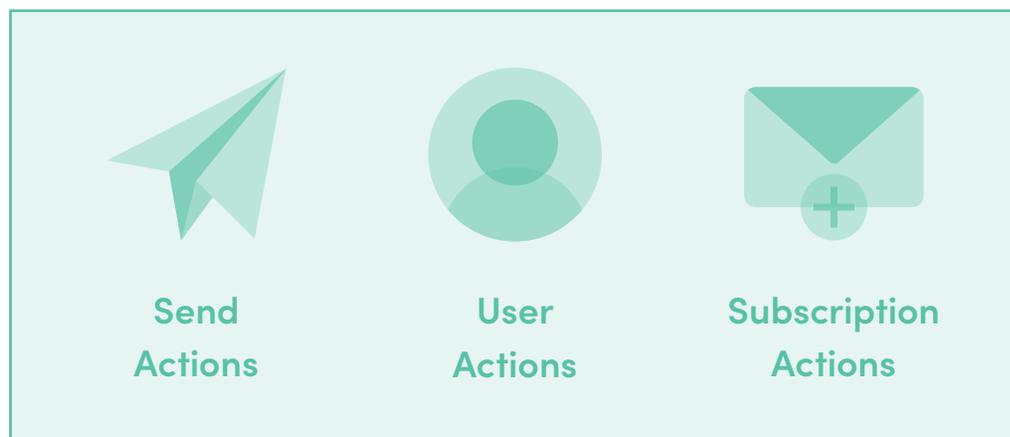
Let's go over each action type individually.

Send Actions

Send actions pertain to the channels you want to message your customer on. While many legacy ESPs enable email-only workflows, modern platforms like Iterable also allow marketers to integrate other channels, like in-app, push, SMS, and web push.

However, it's not as straightforward to integrate all of these mediums into a workflow. Our suggestion is to start with email first, and then start adding in the other channels when it makes sense for your customer's experience.

So in the case of bloomon's reactivation workflow, the audience segment in question is a group of users who are at risk of churning after a one-time purchase. While bloomon could use another channel to alert customers about their incentive offer, it may come across as intrusive. However, it may make sense for bloomon to send direct mail to these users.

User Actions

Another type of action to consider is how a user's information gets updated automatically based on your brand's messaging workflows. This includes how users are added and removed from lists, how their contact fields are changed, and updates to their customer profile.

This sounds simple in practice, but it can get complicated as your brand creates more workflows.

Expanding on our example above, say that a customer received bloomon's reactivation workflow and decides to take up its incentive offer for a free matching glass vase.

Based on this action, the individual customer's profile should be updated to reflect their recent purchase history, taken off the reactivation workflow, and added to a transactional workflow that alerts them via email and SMS about the delivery time of their flowers.

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Subscription Actions

The last Actions are related to subscriptions and how to add or remove a user from receiving further communications from your brand. While some lists are opt-in or opt-out, your brand may allow users to decide how often they want to receive messages from you or the types of messages they receive.

So, for instance, while bloomon has a chance of turning its at-risk users into active customers once again, the company also risks losing people who will unsubscribe if they do not wish to accept the incentive offer. But that's a good thing: An unsubscribe means the customer has already decided that your products and services aren't right for them.

However, it's users who don't open or engage with any of your emails that cause marketers to scratch their heads. So bloomon may simply move them to a newsletter workflow and hope that a user might make an order one day.

Suppose the team wanted to take it a step further. In that case, they could send an email offering the customer ways to modify their profile to receive email notifications when certain holidays or occasions are coming up.

Now that we've covered the three actions marketers can execute in a workflow, let's move on to the final building block.

Filters

The fourth building block of building a customer messaging workflow is Filters. Filters are how specific parts of a workflow decide which users moving onto the next step, depending on criteria that you designate.

There are three ways to filter users through a workflow, which are:

Fields Match

A/B Splits

Field Splits

We'll walk through each of the ways separately.
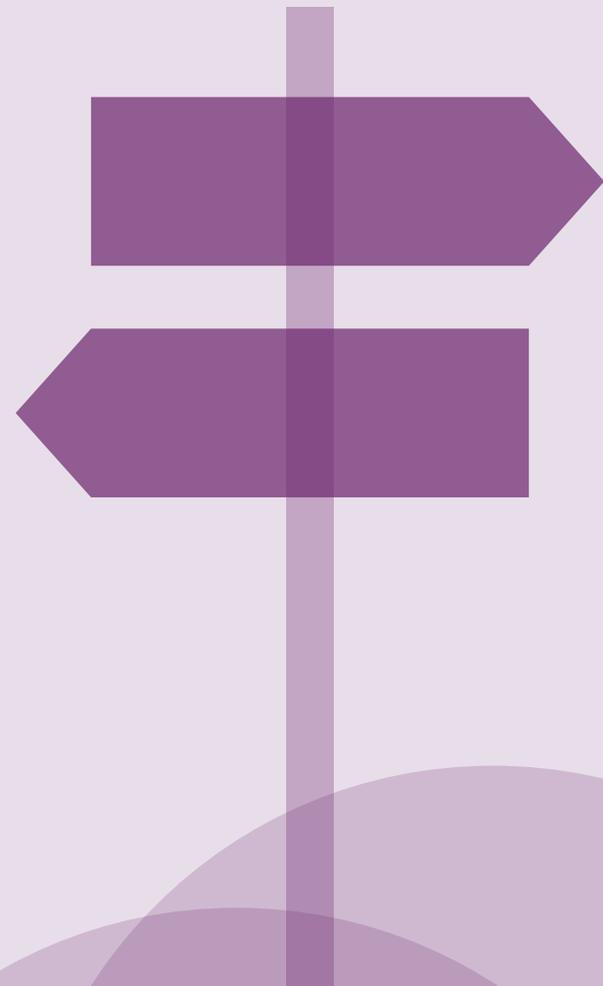
Fields Match

To explain how fields match work, let's assume a user with a bloomon account signed up to receive notifications about her grandmother's birthday in April. We'll call this user Sophia.

However, Sophia hasn't purchased from bloomon since January, which puts her in the at-risk category to trigger a reactivation workflow. Without Fields Match, she's likely to receive both campaigns independent of each other, which is confusing from a user experience perspective.

If bloomon used an attribute like Fields Match, then a filter can prioritize the notification workflow and hope that Sophia will use the reminder to make a purchase and take herself off the at-risk-of-churning category. If Sophia doesn't make an order due to the birthday notification, she can be placed into the reactivation workflow to see if an incentive will prompt her to make a purchase.

A/B Splits

Maybe your team can't decide on a design template or when a user should receive a particular workflow. While most marketing automation software allows for basic A/B testing of your workflows, Iterable in particular enables marketers to split their audience up to five ways.

However, we recommend most brands start with basics if they are new to using A/B splits. For instance, let's say bloomon struggles with open rates for their reactivation workflow—particularly their first incentive email. If we were marketers on their team, we'd analyze the data we have, decide whether it's timing or copy related, and then test and iterate on one variation.

Field Splits

Lastly, there are field splits to consider when you're building a workflow. A feature like this is essential if you're considering personalizing your messages based on specific attributes in a user's profile.

So, for example, let's say Sophia, our hypothetical bloomon customer, notes on her user profile that her favorite flower colors are white and purple. Armed with that information, the bloomon marketing team could personalize the image in her reactivation email workflow to reflect that information, based on the floral varieties they have in stock.

Reviving Any Fallen Petals With a Reactivation Workflow

Much like other subscription-based organizations, bloomon faced the challenge of customer retention. For many, flowers are often associated with one-off occasions rather than a sustained practice, and bloomon ran into troubles personalizing and automating their reactivation campaigns in their legacy system.

With Iterable in place, bloomon sought to revive any wilting customer relationships with new reactivation campaigns. Using Iterable's flexible data management and workflow builder capabilities, bloomon looks to the user profile to determine how to proceed based on the different possible reasons for churn.

By looking in Iterable at the behavioral data of each customer, bloomon is able to curate individual journeys. In crafting a cross-channel experience, bloomon can bring joy to every customer that needs a little brightness added to their days.

START WHEN
CUSTOMER CHURNS

Deactivation Confirmation Email

"We Miss You"
No incentive

Are they NL-NL? And not Atelier?

❌

✅

Atelier?

✅

❌

Leave the Flow

Free Gift
Glass vase or ceramic vase
NEW

Atelier-Focused
No incentive
NEW

Reminder About Free Gift

Still Inactive?

Didn't Open Any Incentivised Emails?

NEWSLETTERS

NEWSLETTERS
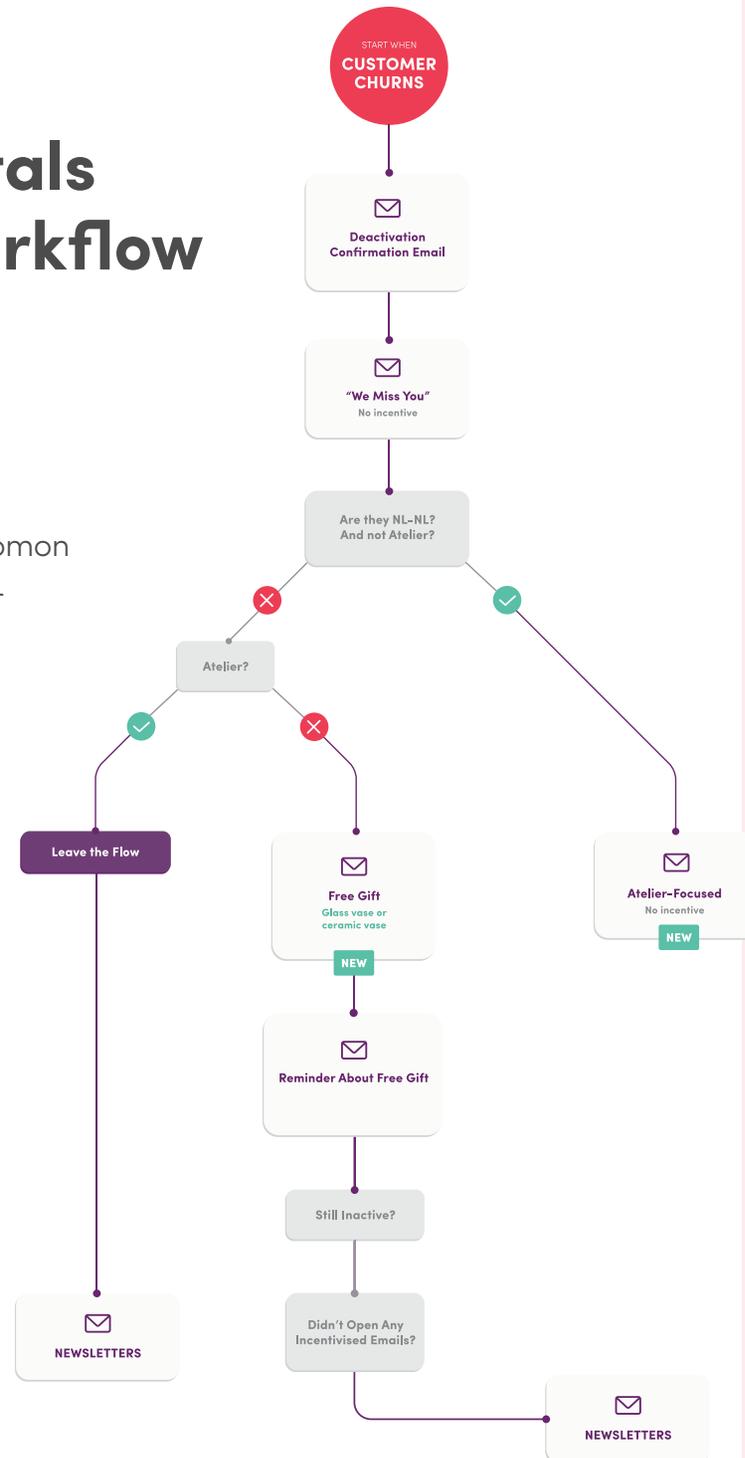
KEY RESULTS

Doubled
the number of reactivations coming from this workflow

300%
increase in conversions from first-touch personalized email

30-40%
of monthly reactivations come from this workflow

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Now, a Recap on Workflow Building

Marketing teams may have grandiose visions when building their lifecycle maps. However, vision doesn't always align with reality—especially if their marketing automation tool assumes the customer journey is linear and sequential.

Luckily, any marketer can utilize the four building blocks of building a customer messaging workflow. They are:

1. **Enter/Exit Criteria**
2. **Timing**
3. **Actions**
4. **Filters**

Using this framework ensures your brand engages with your audience in a dynamic and elastic way, regardless of the ESP you're using.

Now that you understand what it takes to build a customer messaging workflow, what will you create to capture your customers' hearts and minds?

Want to learn why Iterable was named a Leader in Marketing Automation, rated 4 stars or higher by 93% of users? Download the Fall 2020 G2 Grid® Report for Marketing Automation.

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

Trusted By:

box

fabfitfun

Fender

SeatGeek

STRAVA

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