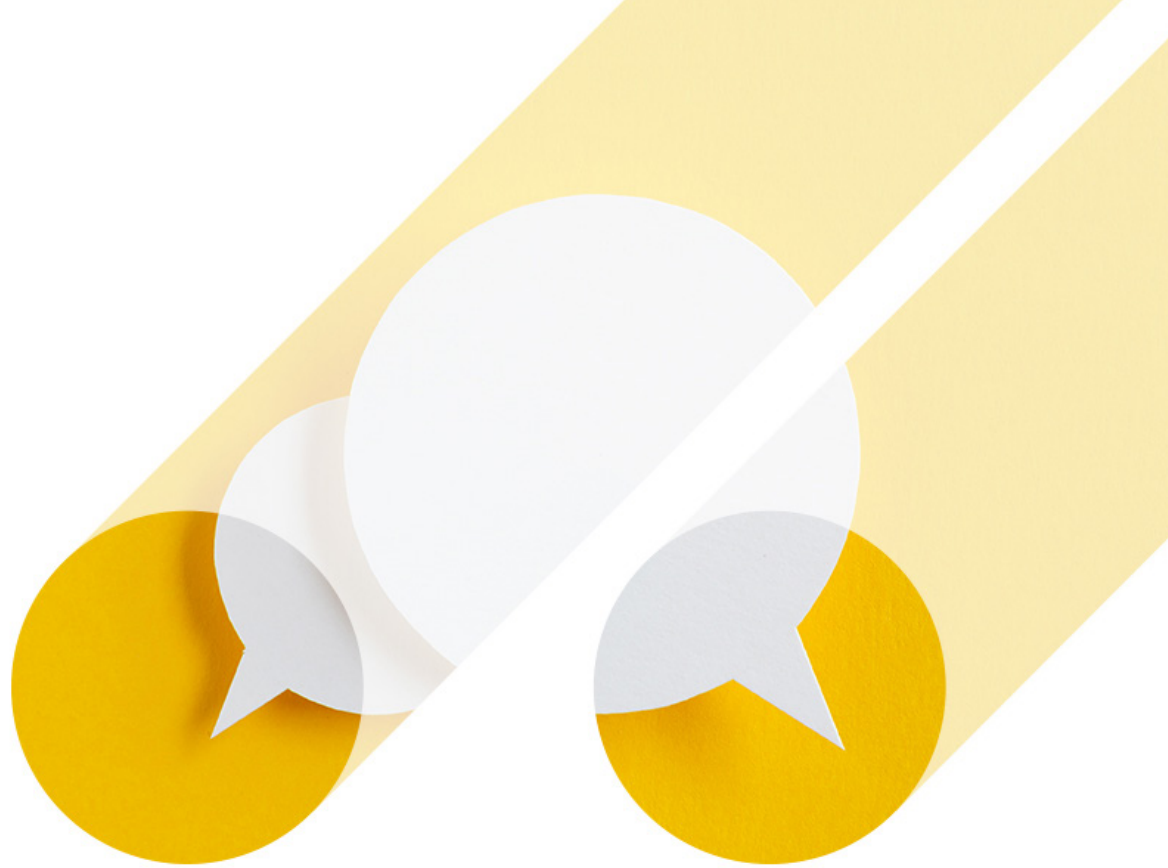


8 Must-Have Workflows for Every Marketing Team



Let's talk workflows

Workflows are designed to get your customer from A to B, depending on your brand's goals. A, for example, could be an email click and B could be a purchase. By building workflows through Iterable, you can trigger specific events to happen based on how a customer has interacted, and is interacting, with your brand.

With a well-designed workflow, customers won't be left thinking, "okay, what now?" There's always a clear next step automatically presented to the customer in a way that makes the most sense for that individual. And, because customers are directed to different workflows based on their unique actions, Iterable workflows are, by nature, personalized. [Personalization improves the overall customer experience](#), so a custom workflow can help improve customer retention and improve brand loyalty.



Setting the Right Goals

Workflows are only as good as the goals you set out to achieve. Without a clear, desired outcome, workflows can become vague, repetitive, and monotonous instead of personalized.

To get started, [Rebecca Chow, Senior Customer Success Manager](#) at Iterable, says, “I would recommend whiteboarding what the customer lifecycle should look like from your customer’s perspective from beginning to end, [an exercise] otherwise known as [lifecycle mapping](#).” From there, you can create the various workflows needed to guide customers through the lifecycle.

In this workflow lookbook we’re going to walk you through eight different examples of Iterable workflows, based on the variety of campaign goals our customers set out to accomplish:

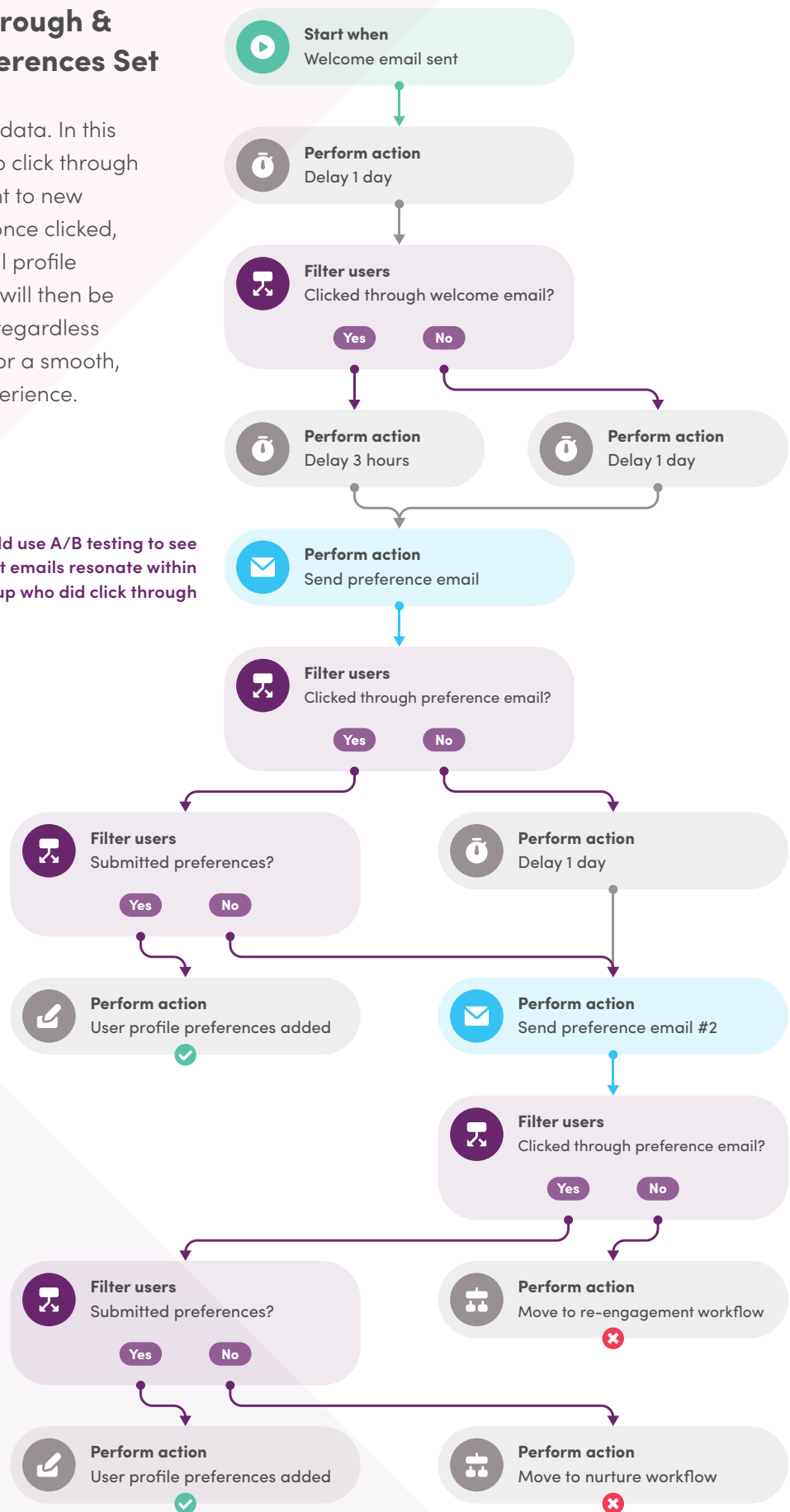
Campaign	Goal 1	Goal 2
Welcome/Onboarding	Welcome Email Clickthrough	Set Additional Profile Preferences
Welcome/Onboarding	App Download in Week 1	App Conversion in Week 1
Promotional	Promotional Email Clickthrough	Coupon Code Redemption
Nurture	Join the Loyalty Program	Conversion in Week 1 of Joining
Abandoned Cart	Abandoned Cart Email Clickthrough	Follow-Up Purchase of Abandoned Item
Abandoned Cart	Abandoned Cart In-App Message Opened	In-App Purchase of Item
Re-Engagement	Re-engagement Email Clickthrough	Coupon Code Redemption
Re-Engagement	Re-engagement Push Notification Opened	In-App Coupon Code Redemption

To get an in-depth look at each of the example workflows, we’ll show a sample of what each workflow may look like within Iterable and how additional features help support our customers’ numerous marketing goals.

Welcome Email Clickthrough & Additional Profile Preferences Set

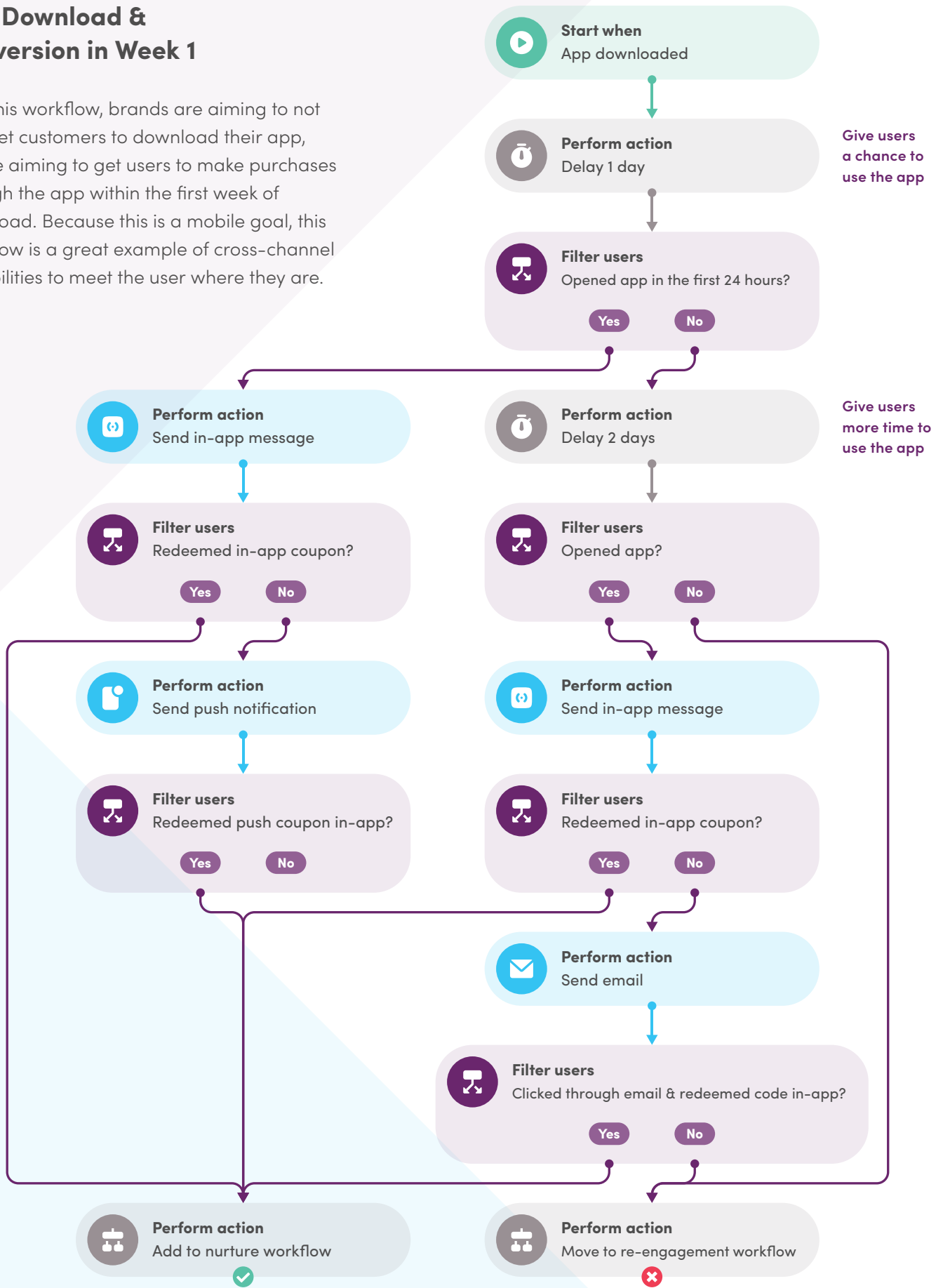
The goal: Get. That. [Zero-party](#) data. In this workflow, you want customers to click through your brand's welcome email sent to new customers or subscribers, and, once clicked, have the customer set additional profile preferences. These preferences will then be linked to their customer profile, regardless of marketing channel, to allow for a smooth, personalized cross-channel experience.

Here you could use A/B testing to see how different emails resonate within the group who did click through



App Download & Conversion in Week 1

With this workflow, brands are aiming to not only get customers to download their app, they're aiming to get users to make purchases through the app within the first week of download. Because this is a mobile goal, this workflow is a great example of cross-channel capabilities to meet the user where they are.



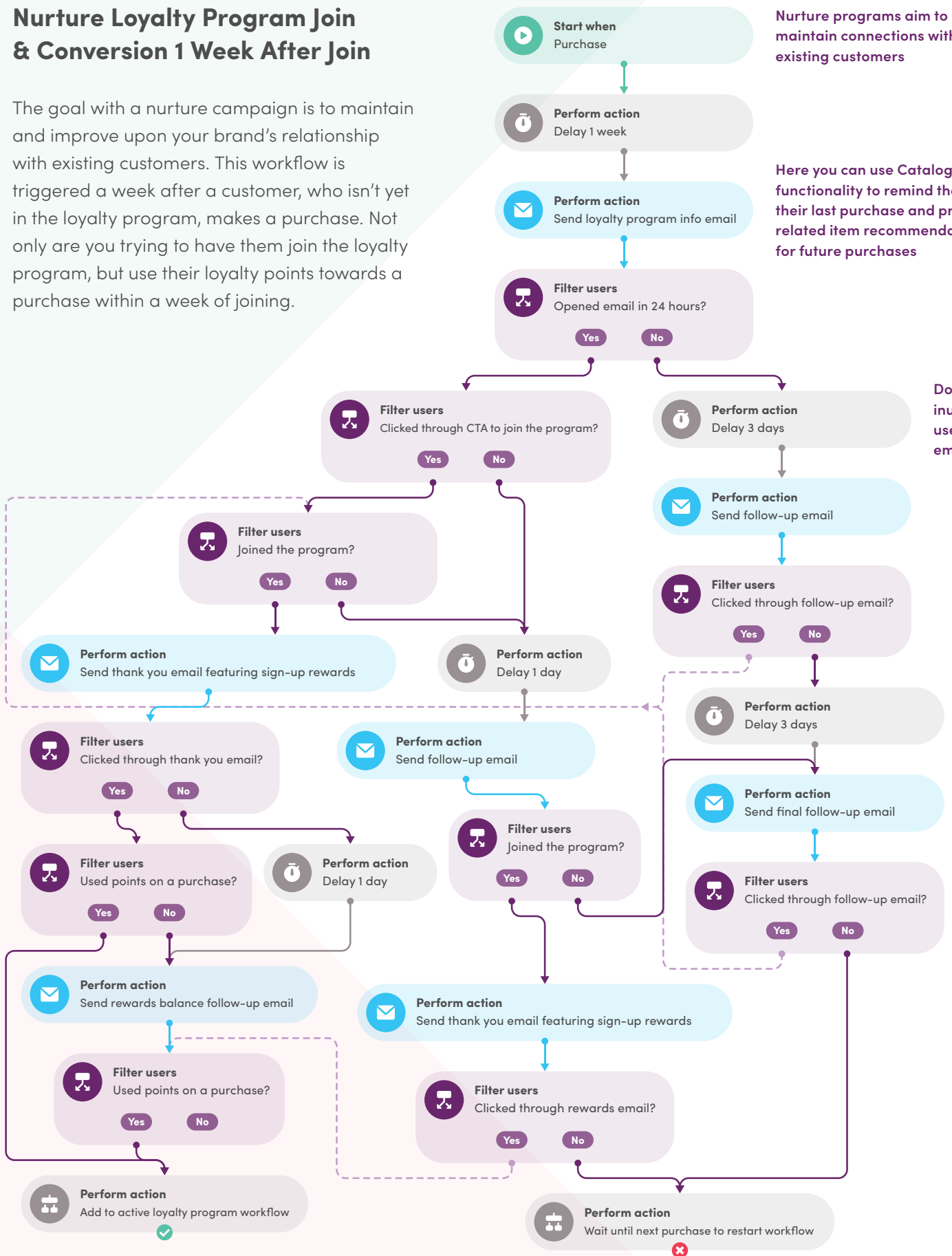
Nurture Loyalty Program Join & Conversion 1 Week After Join

The goal with a nurture campaign is to maintain and improve upon your brand's relationship with existing customers. This workflow is triggered a week after a customer, who isn't yet in the loyalty program, makes a purchase. Not only are you trying to have them join the loyalty program, but use their loyalty points towards a purchase within a week of joining.

Nurture programs aim to maintain connections with existing customers

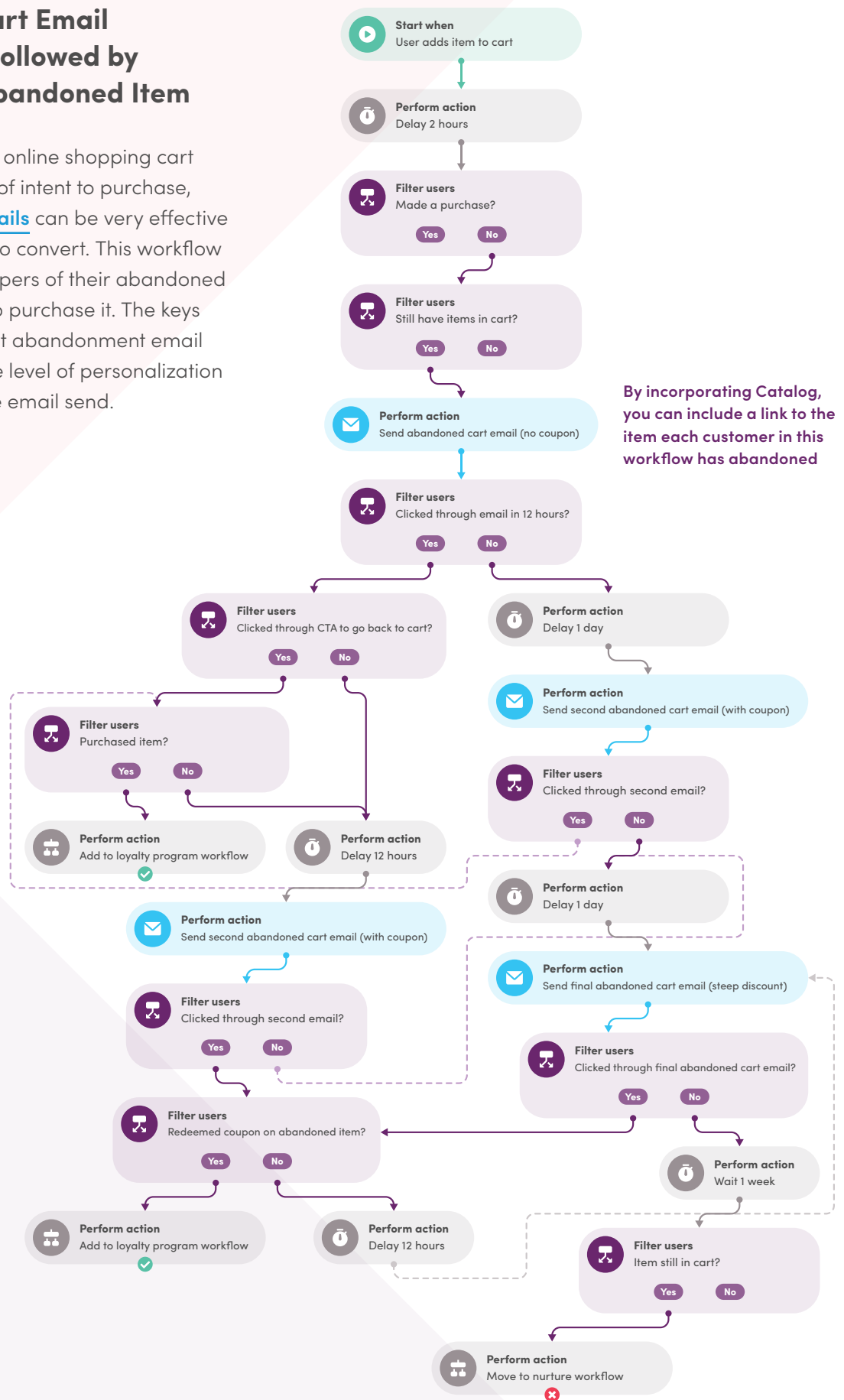
Here you can use Catalog functionality to remind them of their last purchase and provide related item recommendations for future purchases

Don't inundate users with emails



Abandoned Cart Email Clickthrough Followed by Purchase of Abandoned Item

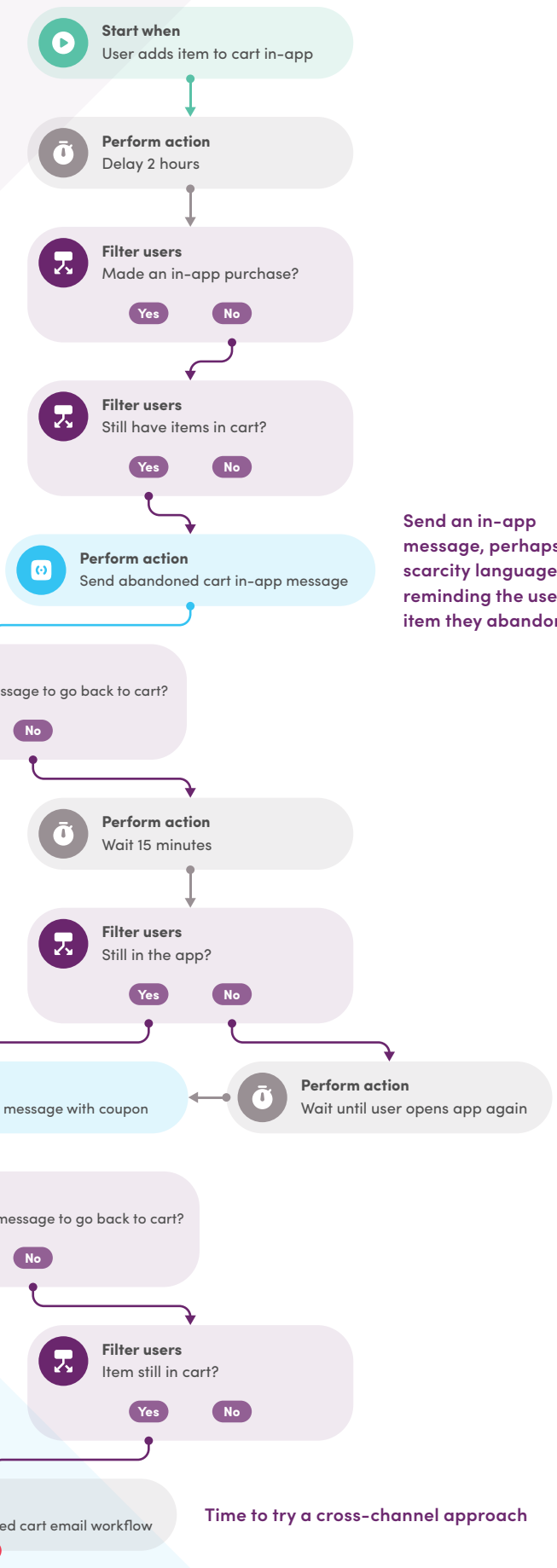
Because building an online shopping cart is a strong indicator of intent to purchase, [abandoned cart emails](#) can be very effective in getting shoppers to convert. This workflow aims to remind shoppers of their abandoned item and get them to purchase it. The keys to a well-crafted cart abandonment email campaign will be the level of personalization and the timing of the email send.



By incorporating Catalog, you can include a link to the item each customer in this workflow has abandoned

Abandoned Cart In-App Message Open Followed by In-App Purchase of Abandoned Item

Like the abandoned cart email workflow, this workflow aims to move users through the funnel. However, rather than using email and a website to convert customers, this workflow uses in-app messaging, assuming the shopper in this scenario added an item to their cart via your mobile application. Timing of in-app messages becomes crucial—you should aim to engage with users when they're in your app.

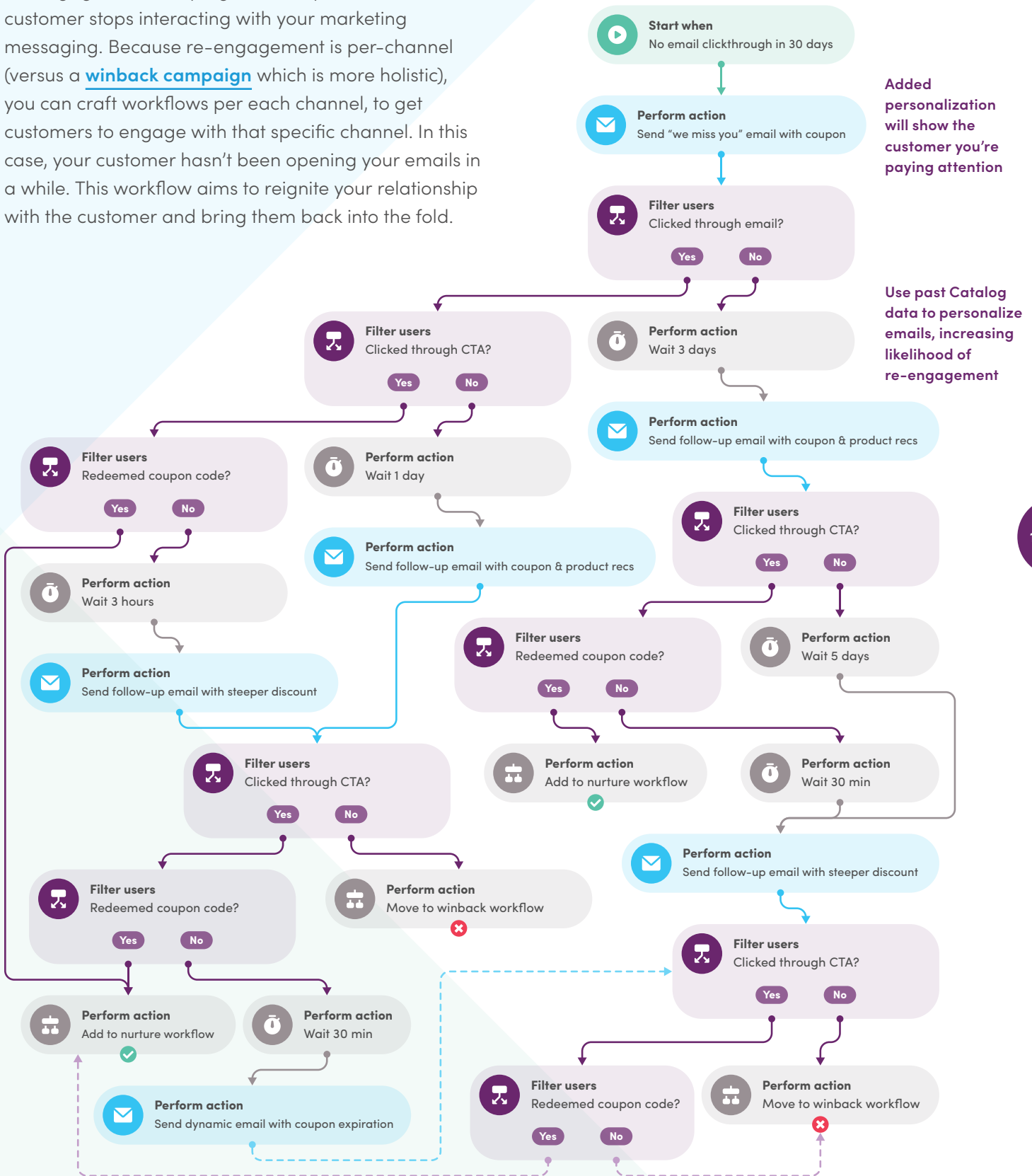


Send an in-app message, perhaps with scarcity language, reminding the user of the item they abandoned

Time to try a cross-channel approach

Re-Engagement Email Clickthrough & Coupon Code Redeemed

Re-engagement campaigns are helpful when a customer stops interacting with your marketing messaging. Because re-engagement is per-channel (versus a [winback campaign](#) which is more holistic), you can craft workflows per each channel, to get customers to engage with that specific channel. In this case, your customer hasn't been opening your emails in a while. This workflow aims to reignite your relationship with the customer and bring them back into the fold.



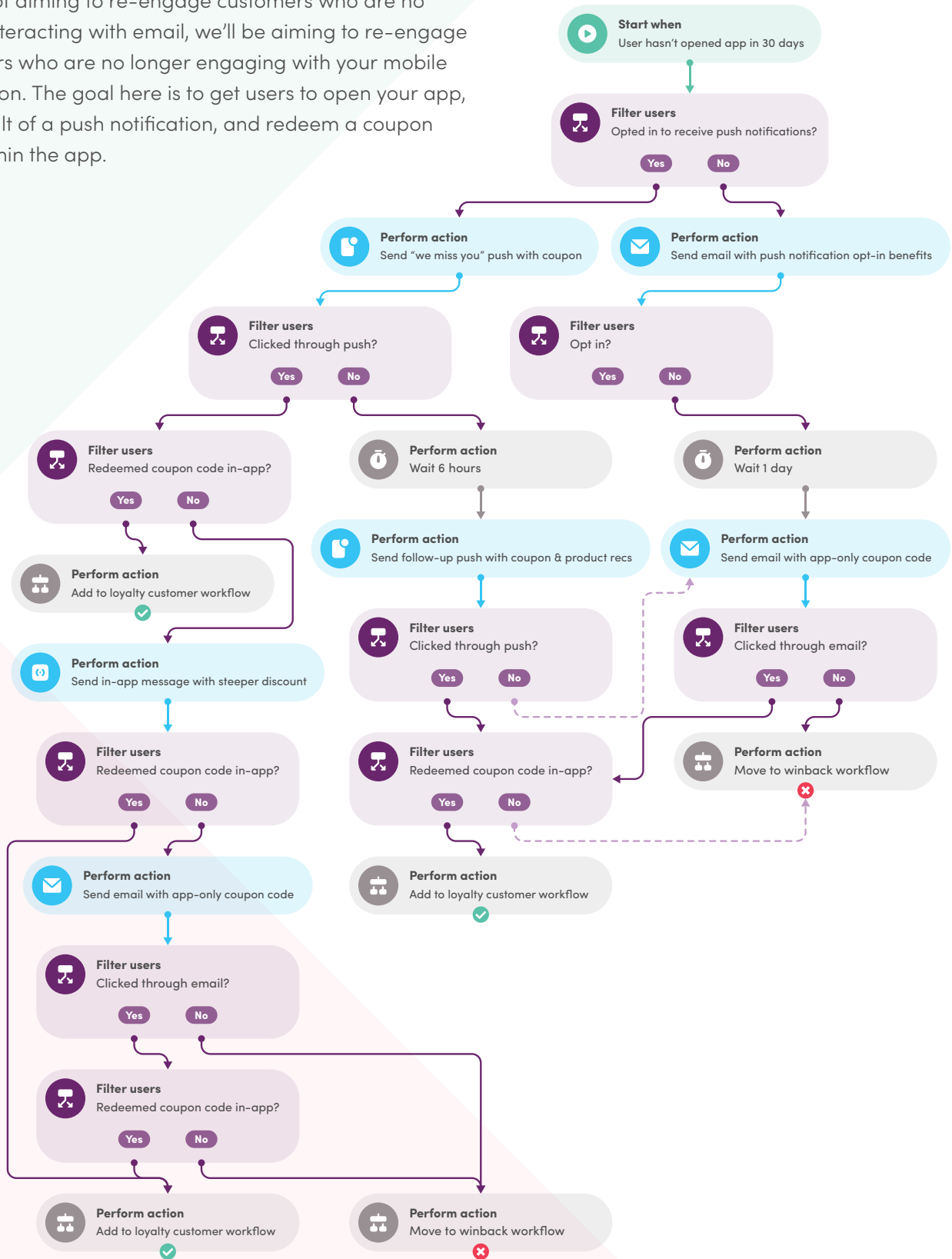
Added personalization will show the customer you're paying attention

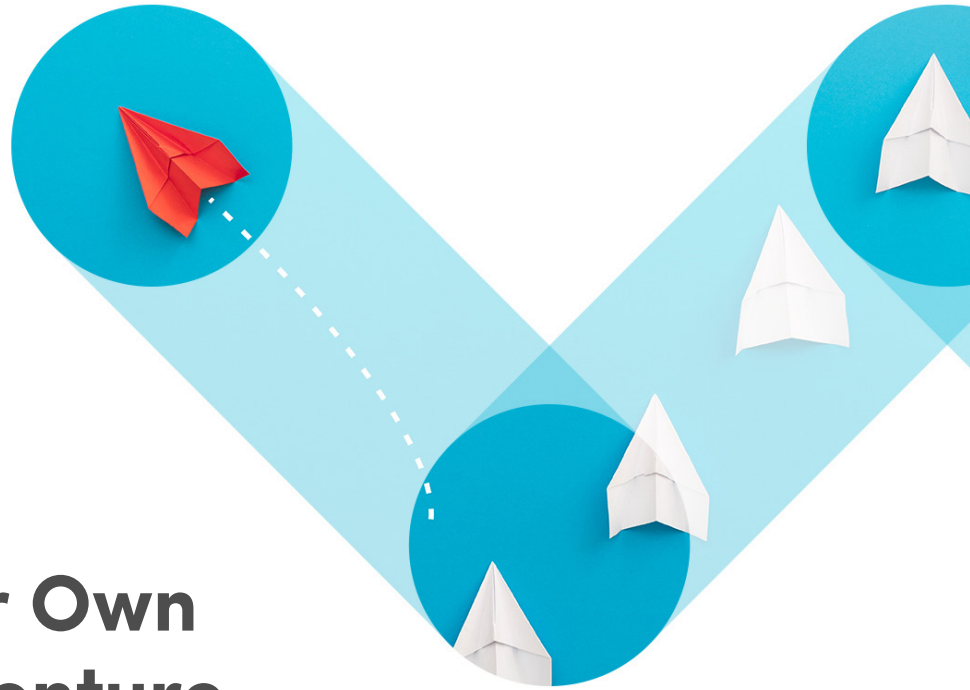
Use past Catalog data to personalize emails, increasing likelihood of re-engagement

By incorporating the dynamic content, you can send emails with countdown timers

Re-Engagement Push Notification Opened & In-App Coupon Code Redemption

In this re-engagement workflow, we'll focus on mobile. Instead of aiming to re-engage customers who are no longer interacting with email, we'll be aiming to re-engage customers who are no longer engaging with your mobile application. The goal here is to get users to open your app, as a result of a push notification, and redeem a coupon code within the app.





Choosing Your Own Workflow Adventure

Think of workflows kind of like a “Choose Your Own Adventure” (remember those?) for your customers. Each interaction will lead to a different customer experience. Workflows ensure that your customer is being guided through a journey that makes the most sense for them, taking each previous step into account. Plus, each workflow can talk to one another, moving users to different experiences depending on how they’re engaging with your brand.

One caveat: workflows can get complicated, so not all adventures will work seamlessly right off the bat. To find the right workflow fit, you need a deep understanding of your business use case, how your products and services impact your customers, and what your customers are looking for.

Luckily, you have the ability to create experiments, using A/B testing, to see how your workflows resonate with different customers. Nothing is set in stone. That’s the beauty of these workflows—they can be edited in real-time, allowing you to improve the outcome for customers if you learn something isn’t working correctly. Or, on the flipside, if you’re seeing a workflow variant performing incredibly well, you can route all future users through that workflow.

Workflows are flexible and provide insight into the most effective customer journeys, while collecting data along the way.

To learn more about Iterable’s workflow functionality, [schedule a demo](#) today.

About Iterable

Iterable is a cross-channel platform that powers unified customer experiences and empowers marketers to create, optimize, and measure relevant interactions and experiences customers love. Leading brands, like Zillow, DoorDash, Calm, Madison Reed, and Box, choose Iterable to power world-class customer experiences throughout the entire lifecycle. Visit [iterable.com](https://www.iterable.com) for more information.

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