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## **Email Trigger Campaign Guidebook**

### Introduction:

Marketers have less bandwidth and smaller budgets these days. But that doesn't mean that management has lowered expectations for revenue from marketing campaigns. With fewer resources than ever, how do good marketers find budget friendly ways to generate sales and reinforce brand messaging?

Trigger email programs can be the solution. With little investment in time or money, companies are strengthening customer relationships and increasing revenue through these automated programs.

In this guide, we will cover:

- a. The Benefits of Trigger Email Campaigns
- b. The Different Types of Automated Emails
- c. How to Start Using Trigger Emails for Marketing
- d. Resources For Setting Up Trigger Emails
- e. And a Bonus Checklist – Idea Starters for Your Trigger Email Arsenal

### Benefits of Email Automation Programs:

Imagine being able to time a marketing message so it meets your customer's needs without any effort on your part. Today's trigger-based marketing programs seize the moment by capturing just-in-time data and turning it into automated executable campaigns before the window of opportunity with customers and prospects begins to close.

Companies that engage in dynamic content trigger-based marketing programs are yielding as much as a 400 percent improvement in response rates over traditional email campaigns. They are matching their knowledge of customer behavior with trigger-based technology that allows them to strike while the iron is hot, all without busting the marketing budget.

Once set up, trigger email programs are set up to go automatically and don't require day to day management. They aren't subject to delays when resources are tight or other priorities come up. And trigger emails can complement broader programs like newsletters, special offers or acquisition programs.

Plus unlike campaign emails, trigger emails are facilitated by customer behavior. Each message responds to an event or customer initiated action and from the customer's perspective, the message received is more highly relevant. This targeting pays off in higher response and increased customer satisfaction.

### Types of Automated Email Programs:

While the term "trigger emails" usually means a whole program, these campaigns are usually built with a combination of types of automated email messages. It's helpful to understand the different types of automated email and their part in your programs:

## 1. Trigger Emails

A trigger email is defined as an automated email message that is sent in response to an event or “trigger”. This trigger can be a customer action or response, an event like a date or website update or a response to web analytics or web visit data. Trigger emails can have static content or have the content change based on targeting or defined business rules. Trigger emails are set up ahead of time and not sent manually through a promotional campaign. Trigger emails can be sent immediately, within minutes, days or weeks later or even be part of a “drip campaign” that sends an automated email series over a period of weeks or months.

## 2. Dynamic content emails

A dynamic content email is one where the content is varied based on customer behavior or customer data. These emails take advantage of knowledge of a specific customer gathered through account preferences, response data, web analytics, etc. with this information used to create highly individualized and targeted content. The use of dynamic content in trigger emails has been proven to increase order size, response and revenue.

## 3. Transactional Emails

Transactional emails are those that are automatically sent confirming a certain activity. Examples include reminders for appointments or events, renewal notices, order or shipping confirmations, confirmations of a profile update, etc. While it is important to keep these messages brief and useful, they are often used for brand reinforcement, promotional opportunities and trust recognition.

**SIDEBAR - A Special Note about Welcome Emails:**

Welcome emails are among the most important in the trigger email process and the most common use of trigger emails. Studies show that recipients who have been through a welcome program have an open rate on subsequent emails more than 40% higher than those who don't. Welcome emails are sent immediately after someone subscribes, places an order or registers with your company. Welcome emails set the first impression of the company, establish cadence and tone and set the customer's expectations, all of which give the company an advantage in the long term. Their use can significantly increase customer satisfaction, decrease opt out and increase order size. While it's a natural to think of a welcome email as only a first contact, they can also be employed at any new point in a relationship – when a customer signs up for an additional subscription, registers a previously unregistered account or reactivates after a period of time.

Welcome emails are ideal for automation because the communication is rote and the use of automation can save your company time, money and resources.

### Setting Up Trigger Emails – Where do you Start?

Today's most successful campaigns use triggers to automatically send email based on dynamic content or when customers take certain actions. This is done by establishing a set of business rules and criteria. Marketers decide the right message, the right customer and the right time and use the combination for highly effective programs.

While trigger campaigns are conceived by marketers, the direction of the contact and content is best held in the hands of the consumer. This may sound scary at first, but it is actually quite simple and easy to execute.

If your company is ready to get started, you need to develop a trigger email plan that defines what will be sent, to whom and when. The following are important factors when you develop your plan:

1. It is important to strategize what these communications can mean to your business and what kind of response you can expect to achieve. Don't look to trigger campaigns to reinvent your company – look at your company's strengths and capabilities to build a realistic program. Set the objectives of your program

on a broad level with goals such as increased revenue, decreased attrition or increased response to campaigns.

2. Inventory what is available in the way of both data and data resources to build a program. What segmentation, testing tools and web analytics are available for your company to choose offers, timing and audience? What information do you actually have on your customers? Before you decide that a birthday greeting is an ideal program, make sure you have that pertinent information on most of your customers.
3. Inventory all customer communication to determine if any current transactional or marketing emails can be put into an automated email system and combined with a marketing message. Then build buckets of possible trigger email content, classifying them into obvious or not so obvious opportunities.
4. No matter what you do, think customer first. Are the offers, timing and targeting right for your customer? If you're brainstorming ideas for trigger emails, consider a survey of your existing base or start a Twitter or Facebook thread to get feedback from customers on what kinds of trigger emails they would find useful.
5. Define the triggers to be used. Is it customer reported data? What kind of information can you ask? How about behavioral triggers like a new account being opened? Changes in spending or purchase habits? Also, determine if you can use your web analytics to set triggers. Having the ability to send abandoned shopping cart messages or use web visit data to personalize content can mean the development of highly effective campaigns.
6. Set frequency and recency rules and a contact cap. With a complex email follow up path, your customer could end up with too many emails or too many too close together. Review your concepts before you start to execute to ensure that if a customer follows a certain response path, the contact is reasonable. Is once a week enough to contact your customer? What if your customer responds to three offers – will they get three follow up emails?
7. However, no matter what you, validation of trigger emails is easy to achieve by reviewing response and ROI figures. Make sure you have a testing plan in place for each trigger and a plan to refine or eliminate any non-performers. Decide before the very first trigger email goes how you will measure, what testing you should put in place, and what your actions will be depending on the results.
8. Never trust automation completely. Although the idea behind trigger emails is that the programs are “set and go”, review the process regularly. Test the system to make sure it is still working. And revisit any trigger email programs if your marketing strategy, product offerings and other marketing factors change. It is very frustrating for the customer to get an outdated offer.

#### Resources for Trigger Emails:

If everyone had to custom program trigger programs, no one would do them. There just isn't enough knowledge or resources in a typical company. Luckily, many email solutions provide the ability to set up these programs and it's easy to get started. The challenge is finding a resource that will set up the level of sophistication you need while still be compatible with your systems.

Choose a robust email platform that enables you to set up trigger emails based on dynamic content and that offers a high level of personalization to create individualized, relevant customer communication. And pick one that offers a multi-touch communication over a variety of channels based on customer history and preference.

Ideally, once you have a list of the trigger emails that you would like, you should find a solution to implement them that:

- Is reliable and flexible to your company's needs.
- Can send out event based and dynamic emails without the need for consultants or programmers to set them up.
- Already has a welcome function built in to greet new subscribers as soon as they opt in, instantaneously providing a personalized email that thanks them for joining and providing pertinent information about your email program.
- Sends confirmations, reminders and follow-ups and additionally, has the capability to send out a satisfaction surveys after purchases, alert customers that their memberships are about to expire or acknowledge receipt responses on web forms.
- Notifies sales reps when subscribers respond to an offer and that lets employees know that individual customers need assistance, prefer specific products or clicked the "request demo" link.

- Customizes your transactional messages and adds offers and marketing messages to your purchase confirmations, invoices, shipping notifications and renewal reminders.
- Acknowledges birthdays, anniversaries and other special dates and sends well-wishes and special offers to individual subscribers based on dates in their demographic profiles.
- Lets your company decide why it should send an automated email and allows you to use more than one trigger to send them. For example, it allows you to send emails to users who joined the list after Jan. 1, 2009 and visited the "you're confirmed for a webinar" Web page.
- Lets your company decide when it should fire – either sending the email as soon as a user meets the criteria or for a set period of time afterward: for example, send the webinar reminder message seven days after signup.
- Connects to back-end systems with detailed customer data, and sends the right message to the right subscriber in real time.

#### Conclusion:

A trigger email program puts the power in your hands to send your customer the right message at the precise moment they are most likely to act on it. These programs use information already available to you to increase the return on email programs without putting more pressure on already strained marketing resources or budgets. Taking the time to strategically plan and set a trigger email program means an automated marketing process down the line that doesn't require being managed on a day to day basis. Don't miss the opportunity to add trigger emails to your marketing mix.