

Use Triggered Email Messages to Engage Customers and Keep Them:
Profiling, Relevancy, and Timing Deliver
One-to-One Marketing



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It is by now widely understood that sending relevant content to the right person at the right time maximizes response rates and minimizes unsubscribes. Simple to say, but not so simple to achieve without automated technology.

Use of event triggered messaging (ETM) or automatic triggered emails can have a direct impact on bottom line cost reduction and top line growth. And with Forrester Research predicting spending on email marketing to grow at a compound annual rate of 11 percent, to reach \$2 billion by 2014, email marketing automation is something every business should be embracing in order to maintain a competitive foothold in the market. Forrester added that unless email marketers increase message relevancy they will waste millions of dollars on messages and campaigns that are destined to be deleted or wind up in junk folders.

More and more email marketers are moving toward a triggered email strategy tied to subscriber behavior, such as subscription signups, renewals, event registration, purchases, and shopping cart abandonment, to name just some of the uses for triggered messages.

Listrak, an innovator in the email marketing industry and the email service partner to companies like The Islands of the Bahamas, Hitachi, and Motorola, has published the following white paper to explain what event triggered messaging is and provide examples of how organizations can automate specific campaigns to increase the relevancy of their messages.

Proof that ETM Works

Insurance company Allstate shared their results using triggered messaging at the 2009 MarketingSherpa Email Summit. John Heidrich and Joe Nettum from Allstate described how their team was moving toward a triggered email strategy tied to major customer events, such as policy purchases, renewals, claims filing and payments.

MarketingSherpa reported, "They compared results from a campaign to encourage customers to sign up for an online account service system. One set of messages was sent batch-style to the entire list, and another set was sent to new customers, triggered by policy purchases:

- Open rates for the triggered email messages increased 84 percent over the batch messages.
- Click-through rates for the triggered email messages increased 32 percent."

Clearly, triggered messages produce results. Allstate's triggered campaigns boasted a 42 percent open rate compared to a 20 percent open rate for standard campaigns.

Automated triggered message campaigns or conversations are making it much easier and faster for businesses to deliver relevant messages and to engage subscribers from the moment they connect with a business. ETM enables businesses to automate customer engagement and manage increasingly sophisticated email campaigns - thereby maximizing demand for products and services while reducing the number of person hours involved.

Best of all user friendly, affordable, fully-featured event triggered messaging solutions are now within reach of all businesses, leaving few excuses or reasons for those email marketers still tied to their batch and blast methods, or struggling to manually track and orchestrate one-to-one marketing strategies.

Uses for Triggered Messages

Individual businesses, like Allstate, have unique events that tie to their specific industry and type of business, such as claims filing. For an e-tailer this might equate with a product return. For a B2B company lead generation and nurturing leads through the marketing and sales cycle may be top of mind.

Whatever the case, event triggered messaging provides total flexibility to decide what messages you will send in response to a subscriber initiated event or action, and to which subscribers or customers you will send that particular message or string of messages in an automated conversation.

At its simplest, ETM technology allows you to set and automatically schedule a follow-up action based on an action or inaction by a recipient or customer. For example a message may be triggered by someone making a purchase on your web site or by someone clicking on a specific link. In this case an external event triggers an automated response.

Alternately an event could be triggered by an initial email message from you – sent out to your list or a segment of your list. As an example, you may decide to target all those people on your list who downloaded a specific whitepaper, setting up a conversation thread that automatically feeds out other published whitepapers and webinars on the same topic, as long as the subscriber continues to read or download the documents. If the recipient stops reading the information, they can be automatically terminated from the conversation so they don't receive those emails any longer.

ETM systems are extremely flexible. Messages can be programmed to launch when a visitor fills out or abandons a form on your site, or after a visitor views a particular Web page a specific number of times (use ETM to see if they didn't find what they were looking for. Do they need more information to make a decision? Will a 10 percent

discount code convert them from a browser to a buyer?), or when a visitor abandons a shopping cart (use ETM to find out why they bailed. Was the cost of shipping too high? Will delivery take too long? What will it take to get them to complete a purchase?).

The only limitation with ETM is your imagination as to what messages can be sent and at which point.

Marketers can respond easily to customers' profiled characteristics, provide information, make offers, and drive them in whatever direction they choose (say, a specific page on a Web site, or to a local bricks and mortar location).

A number of ETM systems also allow you to set up notification emails to sales and marketing for example, letting them know as each contact or subscriber passes through different points of a triggered conversation. Knowing in real time whether a prospect or customer is interested, or not, is valuable knowledge and can be the starting point for an in-person or over the phone conversation.

From Simple Autoresponder Messages to Multi-Path Conversations

Event triggered messages range from very simple, one step autoresponder messages such as a welcome message that is triggered by a new signup, through a birthday or anniversary triggered message that contains a timing component linked to an actual date, to a more complex triggered message series or conversation that uses profiling and dynamic content to create highly specific multi-path messages to different segments of a list, or an advanced ETM campaign to re-engage customers or prospects who have abandoned a shopping cart or a form for example.

The following list outlines a number of uses and scenarios where triggered email conversations can be used. Keep in mind that a new conversation may be triggered from almost any customer touch point:

- External factors – website forms, shopping cart abandonment, customer service, offsite events, etc.
- Messages – email activity (opens, clicks, unsubscribe, etc.), address change, etc.
- List – subscribe or unsubscribe, profile update, etc.
- Link – specific link in email message

Types of ETM Campaigns:

Autoresponder
Behavioral Triggered (Message Open, Read, or Click)
Sales Funnel/Lead nurturing
E-Course / Educational Series
Birthday / Anniversary Conversation
Reservation Confirmation
Whitepaper / Literature Funnel
Site Registration / Welcome Conversation
Returns
Shipping Notice
Credit Card Expiration Notice
Promoting conferences and events - Pre-Event/ Post Event, including integrating offline event data
Cross-Sell/ Upsell
Replenishment and subscription campaigns
Abandonment or Re-engagement Programs - including but not limited to Shopping cart abandonment, forms abandonment, link and click abandonment, web page abandonment
Shipping Confirmation
New content alert- ETM as RSS – when you load new info on your web site or blog, etc.
Membership and product renewal campaigns

Triggered Messaging — How it Works

In addition to knowing the purposes for which you can use event triggered messaging, it is helpful to understand at least in general terms how event triggered emails or conversations actually work. We'll address both as we walk through the following examples, from simple autoresponder to advanced profile-driven, multi-path event triggered conversations.

The following examples are from Listrak Conductor™, Listrak's new event triggered messaging system. With Listrak Conductor you plot your conversations, whiteboard style, on a simple interface that lets you see each path from start to

finish. Conversations are made up of five key steps – trigger, message, wait, GoTo, and terminate. The trigger step is what kicks off the conversation. The message step is the email that is sent out in response to the trigger. Every message needs a wait step attached to it to give recipients time to read and respond to the message. The built-in wait step gives the system a place to hold recipients in the conversation until the next step is triggered. The GoTo step gives you an easy way to send recipients to another part of the conversation automatically, based on their profiles or actions. And, finally, the terminate step ends the conversation.

Here are some examples:

Simple Autoresponder:

Example: Email Subscription

- Recipient subscribes online
- Welcome message is deployed
- Because no action is needed from subscriber, conversation is terminated



This simple conversation could easily be expanded to further engage the subscriber. For example, your welcome or confirmation message can include a link for further information or content. Based on the recipient's response you can take him or her in multiple directions. You'll see this in action when we talk about multi-path conversations below.

Birthday, Anniversary or Reminder Triggered Message:

Example: Birthday Coupon

- Recipient subscribes to restaurant list online and enters birthday info
- One week before the birthday, the system sends out a “happy birthday” email and a coupon for a free appetizer
- Conversation cycles back into a wait step as no other actions are needed
- Next year, one week before the birthday, the restaurant sends another “happy birthday” email with a coupon for 20% off the entire bill
- Conversation cycles back into wait step to wait for the following year
- Conversation is terminated when the person unsubscribes from the lists or chooses to stop receiving birthday emails



Advanced Multi-Path Event Triggered Email Conversation: Using profiling and dynamic content in conjunction with ETM enables email marketers to get even more targeted and granular with their message threads. Most sophisticated ETM systems integrate Web Site analytics and customer behavioral profiling data to create dynamic content, allowing you to deliver high-value engagement campaigns.

In Listrak Conductor, for example, you can set up a profile filter inside a Goto step. When contacts match the filter, they move to the point in the conversation the Goto button is pointing to. If not, they will continue on and pass through the next step. By setting up a number of steps in a row, each with a set profile filters, you can get even more granular with your segmentation.

The graphic below shows an example of a multi-link message. In this example we'll imagine the initial trigger event was a click that occurred in an email that was sent to the entire list.

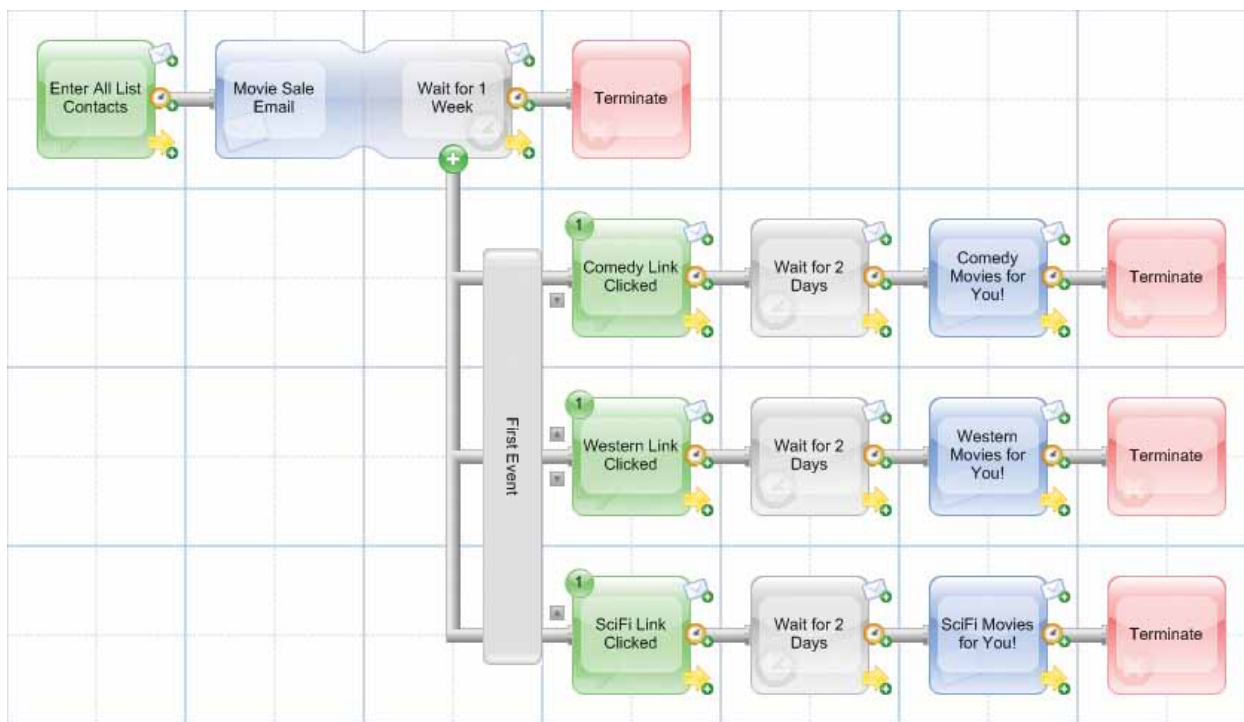
Example: Multi-Path Email

- The organization sends out an email to its entire list announcing a sale on DVDs in the comedy, western, and Sci-Fi categories.
- Recipients have one week to click on one of the links in the message. If no action is taken, the recipients are terminated from the conversation.
- If the recipient clicks one of the links (comedy, western, or Sci-Fi), another email is sent with more information on DVDs in that genre.
- Because no further action is needed, the conversation is terminated.

To ensure a recipient only receives one follow up email even if they click on more than one link, you can set the priority dictating which click you will respond to (first click, last click, specific link, etc).

If you wanted to continue the conversation after that point you could easily extend the conversation thread on the fly. The final terminate step allows contacts to exit the conversation. If any contact unsubscribes from your list at any point, they are automatically removed from any automated conversation they may be in at that time.

Segmenting your subscriber lists and providing relevant dynamic content based on subscriber's actual behaviors and indicated interest, is easily within reach using ETM.



ETM gives you the ability to segment and automatically build dynamic conversations based on demographics, purchase history, life-cycle, last open, last read and much more, instantly increasing relevancy and increasing your response rate, and new conversations may be triggered from almost any customer touch point.

Using Event Triggered Messaging to automate your customer conversations not only enhances your campaign performance and customer relationships, it is also reduces staff time previously spent on manual processing and involved programming. That's a powerful message in today's challenging economy.

To schedule a demo of Listrak Conductor, or to learn more about how event triggered messaging can enhance your email marketing campaigns, [contact us](#) today.

About Listrak

Listrak is a leading provider of hosted email marketing software, allowing permission-based marketers to manage, send, track and grow their email marketing investment. We deliver email marketing intelligence through our intuitive web-based application. Leading marketers have come to rely on this intelligence to better manage email in their multi-channel marketing mix.

Listrak software helps companies, agencies and associations better manage customer relations in their marketing campaigns. Its web-enabled interface helps marketers engage their customers using an advanced profiling and personalization engine. Listrak's world-class support and professional services assist clients with enterprise integration. Its clients include L'Oreal, Motorola, Jeep, PR Newswire, The Islands of the Bahamas, and the Pennsylvania Department of Health.

To learn more about the many ways Listrak can strengthen your email marketing campaigns, or to sign up for a 20-minute web-based tour, visit www.listrak.com.