



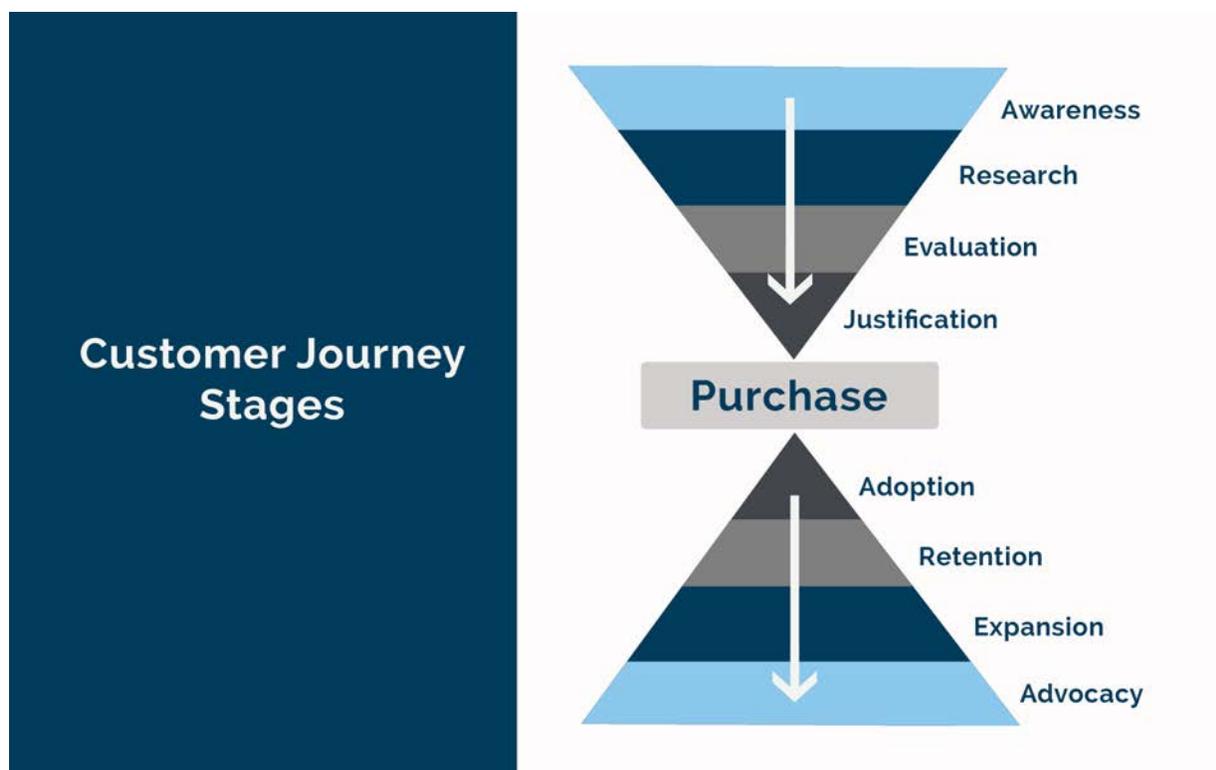
Optimize the Customer Journey:

How to Leverage Marketing Automation for Improved Engagement, Retention, and Growth

For marketers invested in growing their company's marketing ROI, a solid customer engagement and retention strategy is just as important as lead acquisition. With top-performing companies being [50% more likely](#) to optimize the customer experience, the evidence demonstrates that investing time, effort, and resources into your current customers can positively impact your bottom line.

In simpler terms, customer journey optimization after you close a deal is just as valuable when it comes to improving your overall marketing ROI because nurturing your customers after their initial purchase can lead to additional opportunities in the future. Your current customers have already demonstrated they trust your brand and what you have to offer, so you can confidently approach and offer them new products or services as their needs grow.

It costs far more to land a net new customer than it does to nurture and retain an existing customer, and focusing on current customers will help alleviate the need to replace lost revenue in the future. By removing this roadblock, you'll save both your marketing and sales teams' time and resources.

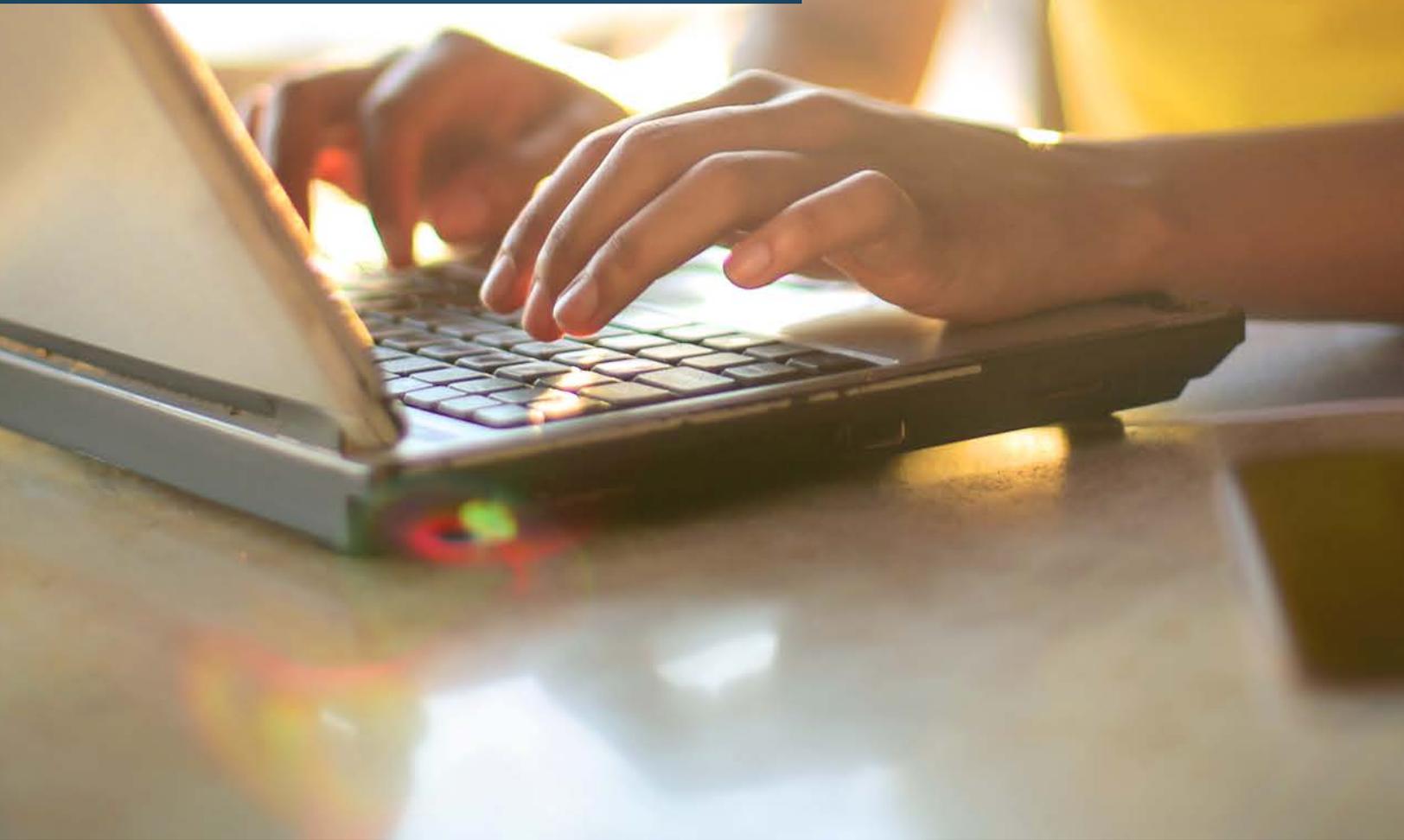


Source: CustomerJourneyMarketer.com

However, maintaining a high level of customer satisfaction is easier said than done. Effective customer marketing strategies help customers successfully adopt your product and reassure them that you are able to keep up with their evolving interests and mitigate their pain points. In addition, you should aim to cultivate loyalty among your customers to the extent they are willing and eager to advocate your organization among their peers.

Accomplishing all this may seem like a handful, especially for us marketers struggling to keep our heads above water. Thankfully, marketing automation streamlines and simplifies customer marketing and retention. In fact, [50% of companies](#) recently said they plan to increase their budget to include marketing automation, and according to Harvard Business Review, CMOs were planning to spend [12% of their company's revenue](#) on marketing technologies in 2018.

Aligning customer marketing and marketing automation strategies can be challenging, especially if you're just starting to familiarize yourself with each of these concepts. This eBook is meant to guide you through key components of a successful customer marketing retention strategy and offer you tips on how to leverage marketing automation to maximize the impact of these efforts. Keep reading to learn how you can leverage marketing automation for improved customer engagement, retention, and growth.





1. Create an Enjoyable Onboarding Experience

According to a [Marketing Sherpa Customer Satisfaction Survey](#), customer satisfaction is highly influenced by a company's ability to demonstrate a customer-first approach. This study revealed that 18% of satisfied customers noted that a business prioritized their needs, while 35% of unsatisfied customers said that a company failed to do so. Ensuring your customers fall into the satisfied bucket involves making customers feel they are a priority from the onset of the engagement.

A customer onboarding program can help establish a customer-first approach early in the customer journey. An effective onboarding program should not start and end with an invoice but should instead consist of multiple efforts aimed at ensuring your customers are able to fully familiarize themselves with your product or service. Your role as a marketer is to equip customers with the knowledge and access to resources that will enable them to see results, stay satisfied with your product or service, and reassure them that you have their best interests in mind.

Without the right tools, new customer onboarding can be tedious. Marketing automation makes it possible to automate otherwise manual processes and provides high-touch, personalized outreach to customers. Marketing automation platforms, such as Act-On, enable you to enter new customers into an automated email program focused on onboarding. After your sales team closes a deal, new customers will receive a sequence of emails at various intervals with content, tutorials, and other resources that will enable them to learn how to use your product/service and leverage it to its fullest.

Act-On's Senior Customer Marketing Manager Sarah Moore points out that part of having a customer-first methodology involves your business making customers feel as if you're there to help them succeed at every step of the way. Sarah takes this approach at Act-On, where she is responsible for driving customer engagement:

"At Act-On, our customer onboarding process starts with an initial thank you email that provides customers with important information and resources to give them a head start on the path to success. We make sure our customers can access Act-On University for training courses and documentation, and our Customer Community where they can get to really know our platform, and interact with others who are going through the same experience. As one of the steps in the program, we send a physical thank you gift for the customer's marketing team to thank them for their business and welcome them to the Act-On customer community."

An effective new customer onboarding automated program should include steps for follow up based on a customer's behavior and progress through the onboarding process.

Since you can expect many of your current customers to upgrade or make a new purchase from you in the future, it is also important to have an onboarding process in place for these instances. Just like you did in your initial onboarding, provide customers with tools and resources that will help them to fully reap the benefits of this new purchase. After every additional purchase, you should send automated confirmations and educational messaging that ensures optimal usage of the new product or service.

Your onboarding process serves as a foundation for an enjoyable and successful customer experience, so it shouldn't be overlooked as an integral part of your customer marketing and retention strategy. Ensuring your customers are satisfied from the beginning will save you time and money that would have been otherwise needed to put out future fires.

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SARAH MOORE

Senior Customer Marketing Manager,
Act-On

2. Leverage Marketing Automation to Keep Customers Engaged

Your interaction with new customers doesn't begin and end with the onboarding process. Instead, a successful customer marketing strategy requires you to continuously keep customers engaged with your brand, and that's where many companies fall short. In fact, a study by [Accenture](#) shows that nearly 80% of companies spend less than 30% of their resources and efforts on content and messaging aimed at customer retention. That's a huge miss if you consider the time and resources you'll invest in replacing these customers should they decide to abandon you for a competitor.

Setting up a customer newsletter is a great way to keep your customers in the loop by feeding them relevant content that will inspire loyalty and further pique their interest in your brand. Newsletters are especially effective because they allow you to test different forms of content and topics. The right marketing automation platform can provide you with the data and insights that you need to consistently improve your newsletter content and customer engagement.

Further, marketing automation platforms enable you to easily segment customers based on their interests and behaviors and develop different automated programs to address what's most relevant for any given segment. For example, credit union [TruStone](#) leverages Act-On's marketing automation platform to improve customer engagement by appealing to their personal financial needs and goals. Instead of sending mass emails to all their customers, TruStone uses segmentation to provide timely and relevant messages on company updates, financial education, and product solutions. This approach has enabled TruStone to achieve open rates of 83.3% on highly-segmented emails and 68.8% on nurturing emails.

However, great content and consistent communication is only a piece of the customer engagement puzzle. When

it comes to motivating customers to continue engaging with your brand, nothing beats meeting with them in person, which is made easier with marketing automation segmentation. You can use your marketing automation platform in combination with your CRM to group customers based on location and send invites to nearby events hosted by your company or partner brands.

Most of your existing customers spend a great deal of time online, so social media plays a major role in retention and engagement. While posting to Facebook, LinkedIn, or Instagram multiple times a day may be the last thing on your mind when you have a busy schedule, automating your social media efforts eliminates this barrier. Tools such as Act-On's [advanced social media module](#) allow you to plan posts far in advance and measure their interaction to keep customers engaged without having to pause your day.

As with many of your other marketing efforts, there is not a one-size-fits-all strategy to keep customers engaged. Thankfully, marketing automation can empower you to easily launch various efforts - such as email, landing pages, and social media - to effectively target and capture the attention of your diverse customer base.

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ACT-ON SUCCESS STORY

TruStone uses marketing automation to improve how they communicate with their customers.

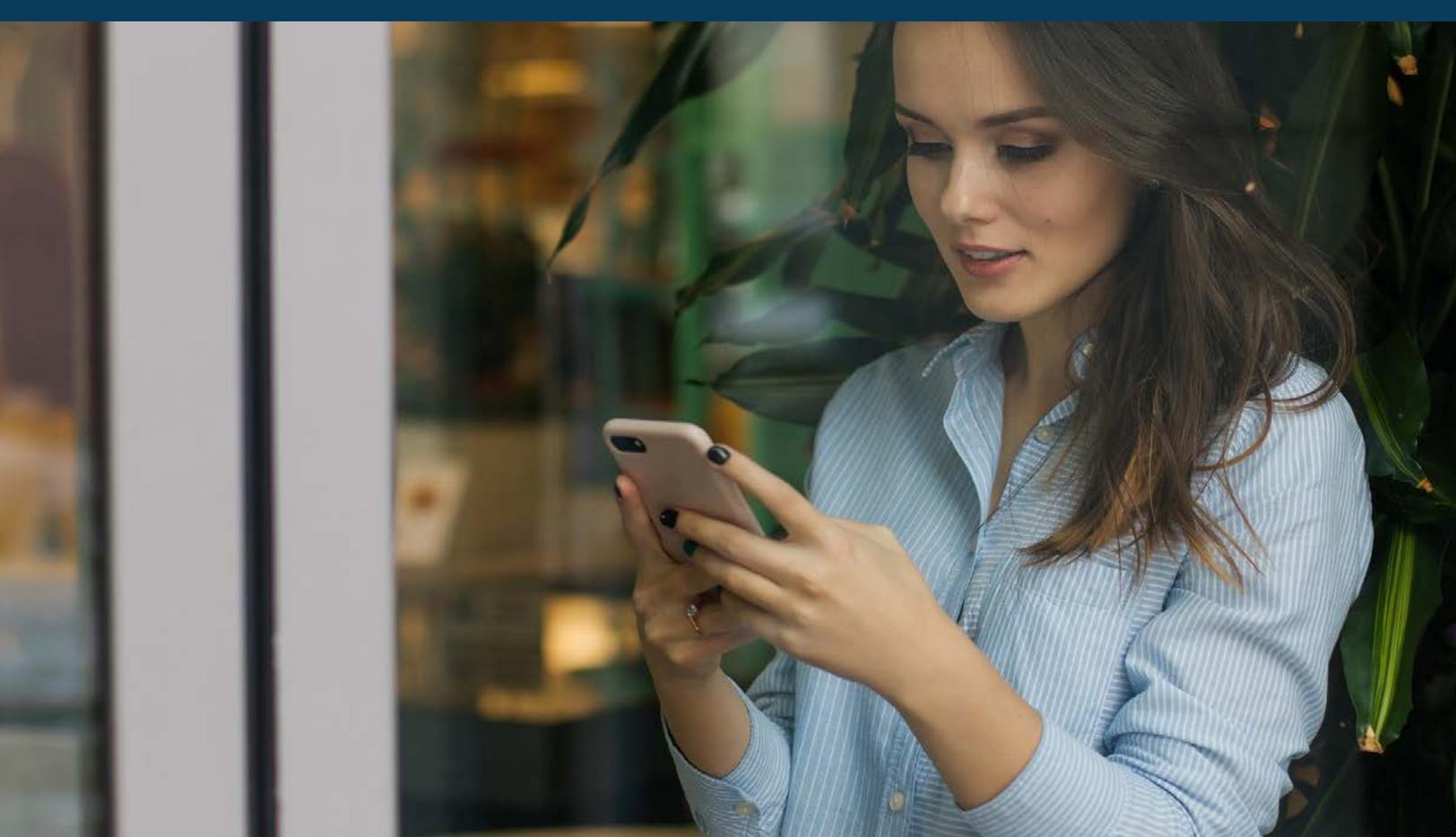
Before implementing marketing automation, TruStone Financial was using another platform to run email campaigns. However, the credit union was struggling to engage with current customers and wanted a solution that would enable them to provide their audience with more personalized communication. Implementing Act-On's marketing automation platform has enabled TruStone to do just that and improve engagement across the board. The credit union has been able to achieve open rates of 83.3% on highly-segmented emails and an average open rate of 68.8% on nurturing emails.

"Act-On helps us better serve our members so that we can offer timely and relevant messages on company updates, financial education and product solutions. We are now better able to send the right message at the right time to the right members."

STEVE STEEN

Chief Business Officer

[Read the Success Story](#)



3. Keep Customers Informed with Critical Customer Communications

While most of us have a customer-centric approach when it comes to innovating our products or services, we can't assume our customers know that. If your customers go months without hearing from you, you can't assume they know you have something in the works to make their lives easier. If the pain points they're experiencing are drastically impacting their everyday lives, this lack of communication may influence them to go to a competitor.

Getting customers to read critical communications can be tricky. However, marketing automation platforms help

ensure that the majority of your customers engage with your content and receive important notifications. Try A/B testing subject lines, and use your platform to send the same message to a group that has not engaged with your initial email to ensure all customers have received this information. You can use the results of your A/B testing to guide your approach for similar messaging in the future.

Keeping customers in the loop regarding any critical communication — such as product and company updates, scheduled maintenance, new features, and/or services — is key to ensuring customers that you have their best interests in mind and can go a long way toward differentiating you from your competitors. In fact, according to a study by Marketing Sherpa, [77% of customers](#) in the U.S. don't believe companies employ a customer-first approach. Therefore, taking an extra step to inform your customers of important and relevant information and remind them that they come first when developing your business will improve their perception of your brand.

4. Implement Customer Scoring to Gain Visibility into Customer Behavior and Take Action When Needed

While many of us are familiar with lead scoring, customer scoring is a less familiar practice that can give your customer account reps the visibility they need to step in when necessary, helping you ensure your customers stay happy. In addition, scoring customers can help you determine the health of your accounts and empower your team to more accurately forecast renewals when reviewing your organization's annual budget.

Customer scoring works by using your marketing automation platform in combination with your CRM to assign points to customers based on their behavior. You can assign positive points for actions such as providing positive feedback, email engagement, and how often they use your product or service. Similarly, consider assigning negative points to actions such as submitting a complaint ticket, negative feedback, and low usage of products and services (which could indicate they're ready to ditch you for a competitor).

Continuously monitoring the health of your current customer accounts will enable you to quickly step in and take action when needed. This keeps customers happy and prevents you from having to take more drastic and expensive measures to retain them in the future.

5. Nurture Customers Based on Their Current Sentiment

Scoring, along with segmentation, opens the door for more personalized marketing efforts, which can yield great results for your organization. In fact, [a study by McKinsey](#) found that personalized marketing yields 5-8x ROI and can result in a 10% increase in sales. This plays out similarly for current customers as it does for your leads.

Segmentation and ongoing nurturing efforts are important for each of your customer segments. Sarah Moore recommends segmenting your customers into the following buckets: advocates/promoters, neutrals, and detractors. "Your next step is to put each of these customer segments into an automated email program that nurtures them by providing content and resources relevant to their current sentiment."

As with your leads, never assume the customer journey will be identical for each individual, and that's where personalization comes into play. Grouping customers based on factors such as pain points and level of satisfaction allows you to provide them with relevant content to help them progress to the next phase of the customer journey. For example, for customers in your detractor pool, your marketing efforts should be personalized to address and alleviate their pain points so they feel more comfortable with your product or service. Once they've reached that stage, you can enter them into another program and so on.

Nurturing your current customers is an important part of your engagement and retention strategy and should be an ongoing effort. Marketing to current customers based on their sentiment allows you to keep happy customers happy and nurse those accounts that are not doing so well back to health.

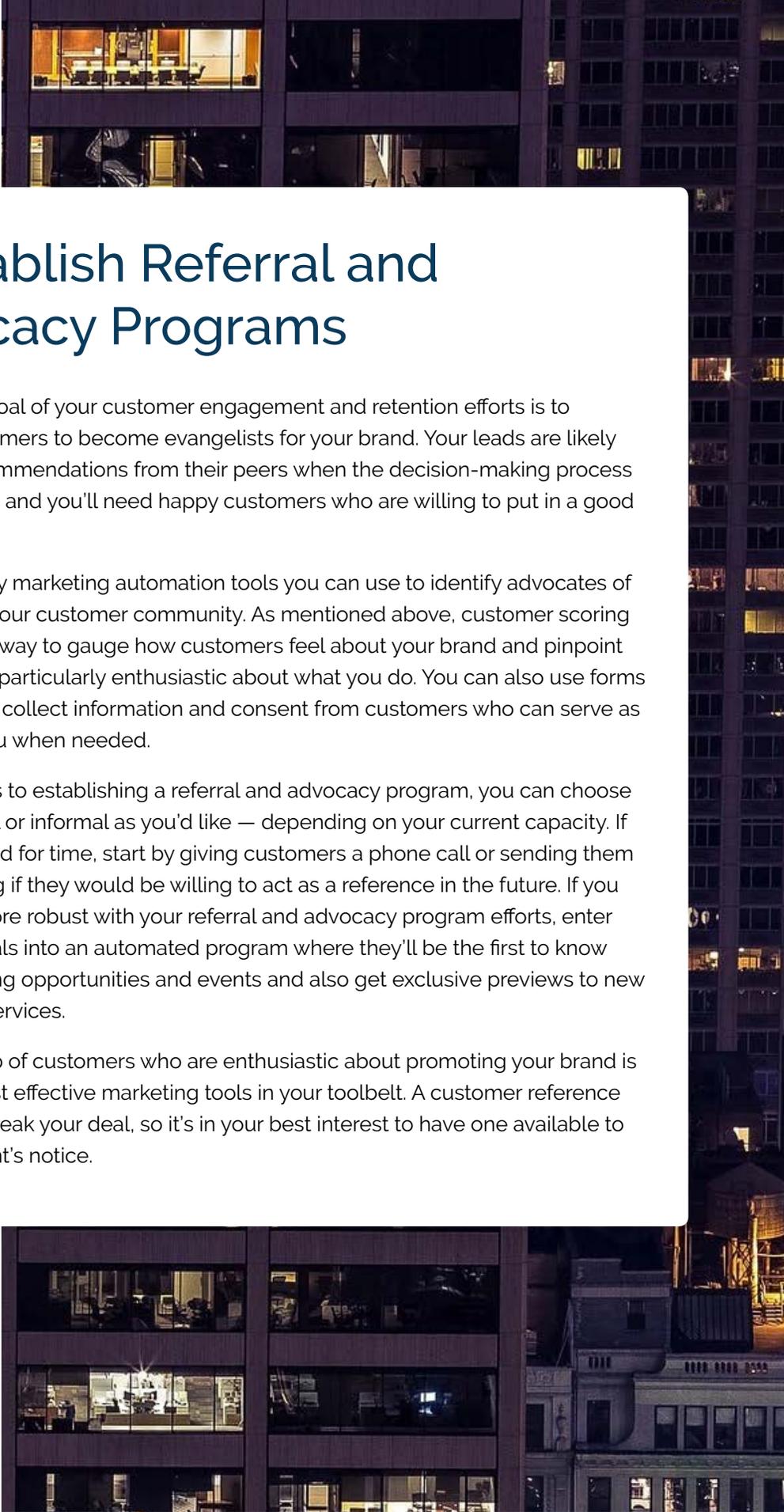
6. Match Current Customers with New Products and Services

There are many ways you can leverage segmentation besides the method previously mentioned. Another strategy you should employ to keep customers happy is segmenting your contacts based on products or services you think they can benefit from. By taking this extra step to educate your customer, you open the door for your sales team to step in at the right time and offer them upsell and cross-sell opportunities.

Sarah Moore notes that marketers should think about this process the same way they do when they nurture and pass on qualified leads to sales. "Think of your current customers the same way you think of prospects and leads. By segmenting customers who are not using a new feature or product, you can guide them to information explaining how this solution can alleviate current challenges and help them succeed. In doing so, you are getting very personalized about what customers are currently utilizing and what you think they should utilize for optimal success."

If you're not yet convinced that this method is essential to your customer marketing strategy, keep in mind that customers want you to be one step ahead of them when it comes to identifying products or services that will make their lives easier. In fact, Marketing Sherpa's Customer Satisfaction Research Study found that [37% of satisfied customers](#) believed that a company helped them make the best decision to fit their needs. Therefore, your role as a marketer is to provide customers with resources to make informed decisions that match their goals.





7. Establish Referral and Advocacy Programs

The ultimate goal of your customer engagement and retention efforts is to motivate customers to become evangelists for your brand. Your leads are likely to rely on recommendations from their peers when the decision-making process comes around, and you'll need happy customers who are willing to put in a good word for you.

There are many marketing automation tools you can use to identify advocates of your brand in your customer community. As mentioned above, customer scoring is an excellent way to gauge how customers feel about your brand and pinpoint those who are particularly enthusiastic about what you do. You can also use forms and surveys to collect information and consent from customers who can serve as referrals for you when needed.

When it comes to establishing a referral and advocacy program, you can choose to be as formal or informal as you'd like — depending on your current capacity. If you're crunched for time, start by giving customers a phone call or sending them an email asking if they would be willing to act as a reference in the future. If you want to get more robust with your referral and advocacy program efforts, enter these individuals into an automated program where they'll be the first to know about upcoming opportunities and events and also get exclusive previews to new features and services.

Having a group of customers who are enthusiastic about promoting your brand is one of the most effective marketing tools in your toolbox. A customer reference can make or break your deal, so it's in your best interest to have one available to go at a moment's notice.

Conclusion

A happy customer base can lead to a multitude of opportunities, but nurturing a relationship with your consumers and keeping them satisfied also takes effort on your part. Thankfully, marketing automation can save you time and eliminate the stress of implementing a successful customer marketing and retention strategy, while equipping you with the tools you need to maximize your marketing ROI.

The main reason marketing automation is effective is that it removes much of the manual labor required for tasks such as segmentation, sending emails, and keeping up with your social media efforts. In addition, it enables you to improve the personalization of your overall marketing efforts, reminding your customers that you understand their pain points, offer solutions to alleviate them, and employ a customer-centric approach.

If you would like to learn more about how you can leverage marketing automation to improve your customer engagement or overall marketing efforts, we invite you to visit our website at [Act-On.com](https://www.act-on.com) or schedule time to [talk to an expert](#).