



Next-Level Growth and Customer Retention Strategies.

A practical roadmap.

A QUICK KEY



Time Savers



Further Reading or Assumed
Knowledge Base



Pro Tip

Foreword:

Who will benefit from this document?

Keep reading if you are:

- A company that struggles with multifaceted growth or retention issues
- A company about to hire a retention marketing person, and in need of a clear roadmap
- A company that struggles with email fatigue or list burn
- A company that is looking to transition and improve their growth and retention efforts to include next-level strategies such as those leveraging Ai and Machine learning
- An early-stage company looking to build the correct centralized data foundation for long term success
- A company in need of a retention overhaul
- A company that wants to put next-level customer success infrastructure at the heart of what they do.

Customer success strategies and retention strategies are growth strategies. They are pivotal to overall company success and profitability.

This document is a practical guide, designed to give the hands-on practitioner's actionable tasks that move from foundational to advanced techniques to achieve success.

Self-perpetuating growth loops, machine learning-driven insights, Ai decision making, and automated marketing are just a few of the ideas that will be discussed herein.

Let's get started.

Table of contents

Foreword	3
What does retention success mean?	5
Breaking the paid acquisition obsession	6
The hierarchy of retention needs	12
How to achieve retention success.	13
Foundational architectural elements	14
Retention showstoppers	16
The 360° Retention Audit	17
Short and long term fixes	26
Data gaps	27
Closing the data gaps	28
Enrichment	29
Customer information type and value	33
Marcom medium/ relevance/ value	34
Insights	38
Predictions	40
Next-level retention improvement loops	42
Automation	44

What does retention success mean?

A powerful and effective retention ecosystem leverages all available, pertinent data to communicate to each customer in a way that maximizes trust, goodwill, and lifetime value. It listens and acts appropriately, removing customer friction so that it's easy to interact with your company. It anticipates the customer's needs with proactive solutions in an automated, scalable way.

If this seems very far away, fear not, as this action plan will walk you through the building blocks to help achieve this goal.

Now, if you're reading this thinking, "I have a retention problem," retention is just a symptom of another issue. Still, this action plan will help you uncover the root cause of the issue and arm you with the best possible tools to address the actual problem.

Retention success is company success; it requires excellence across all areas of operations.

Marketing is like a game of catch. You can throw balls into the air, but it only becomes a game of catch when you have someone on the other side to catch the ball and throw it back. Spending money on acquisition marketing before you have robust retention infrastructure in place is the equivalent of throwing money in the air.

Retention success as defined in the broad sense of customer success is more important than paid acquisition but often lives in its shadow in terms of focus, tools, and company resources. Breaking the paid acquisition obsession is a key first step to attacking retention issues.



Perform a quick gut check. Count the number of employees you have working on acquisition vs retention, is it balanced?

Breaking the paid acquisition obsession

Many companies develop a paid acquisition bias as they seek to grow. The common justifications are:

- Acquisition growth is a fast short-term fix.
- Acquisition marketing is somewhat predictable in terms of ROI.
- Customer acquisition is less unwieldy to manage as it's typically before the customer has experienced the product.
- Managers are incentivized by growth as defined by new customers.
- The company has a "one-time sale" mentality and doesn't create recurring revenue opportunities.
- The company is more concerned with market share than profitability.
- The company is under stakeholder pressure to create hyper growth.

The paid acquisition obsession can be countered by showing how retention strategies create: 1) More profit and 2) Overall company success.



If retention and customer success is adequately prioritized in your company then skip to page 11

A new customer brings immediate cash and, at least in our example, a profit contribution; however, a second or third sale to an existing customer creates dramatically more profit. See our simple example:

	1st Purchase	2nd Purchase	3rd Purchase
Selling Price	\$80	\$80	\$80
Gross Margin	50%	50%	50%
CAC	\$25		
Profit	\$15	\$55	\$95
Cumulative Profit			
Total new customers needed to beat profit from repeat purchase.		4	7

Companies exist to create profit, and long term valuations will always depend on profit. While short-term investment fueled goals might put a premium on growth or market share, investors’ appetites and focus invariably fluctuate with the economy, there is no substitute for profitability.



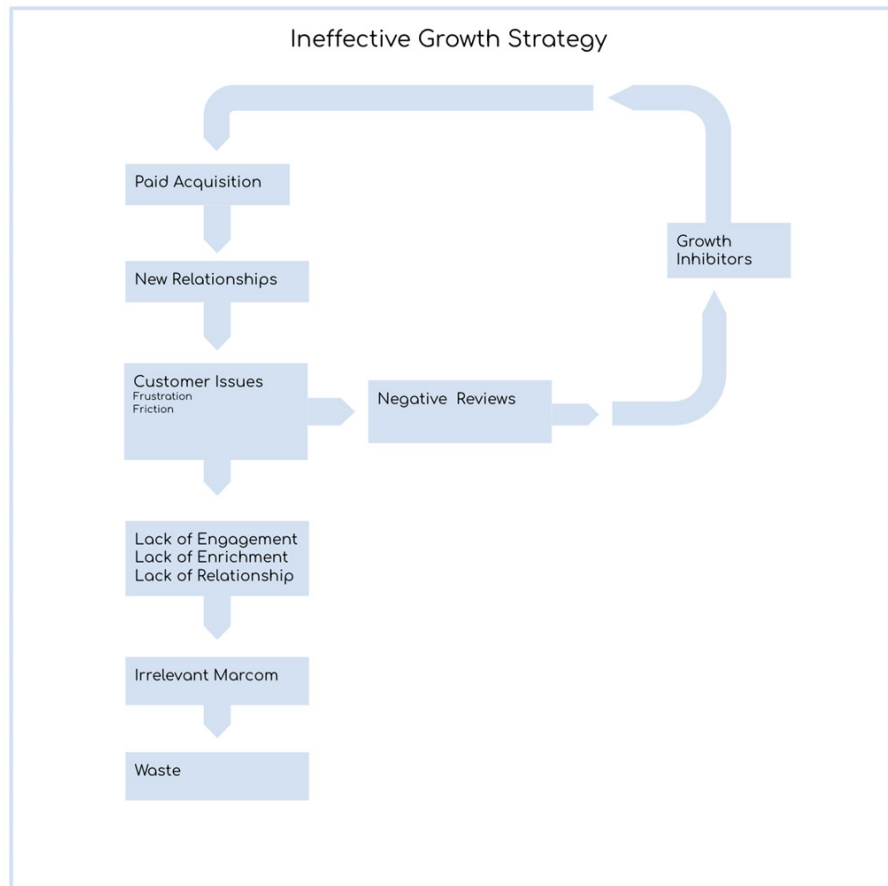
Run the actual acquisition and retention math for your company with your unit economics and CAC. Know the profit generated from each type of repeat purchase

Customer acquisition costs are increasing. The speed of this increase is affected by competition, growth velocity, and market saturation. In highly competitive media markets, sometimes the rates are so high that the initial CAC isn't profitable. Without world-class retention, these companies will not survive.

Company survival requires delivering at least basic customer success, but only delighted customers engage in viral advocacy. Without an adequate focus on improving customer success, not only will you lose out on the viral upside, the fallout from negative reviews and negative social posts will render your acquisition ineffective. However, positive social-proof and viral advocacy will act as rocket fuel to your acquisition strategies, creating a virtuous circle of growth (a growth loop).

Retention strategies are growth strategies.

Let us briefly examine what happens when paid acquisition is the main focus, at the expense of an adequate focus on customer success and retention.



The negative fallout from bad reviews and the underdeveloped customer relationships will lead to massive inefficiency, growth problems, and rampant waste. An over-dependence on paid acquisition is not a recipe for long term success.

Now let's examine how retention success and customer success create self-feeding growth loops, how they act as force multipliers to your acquisition efforts.



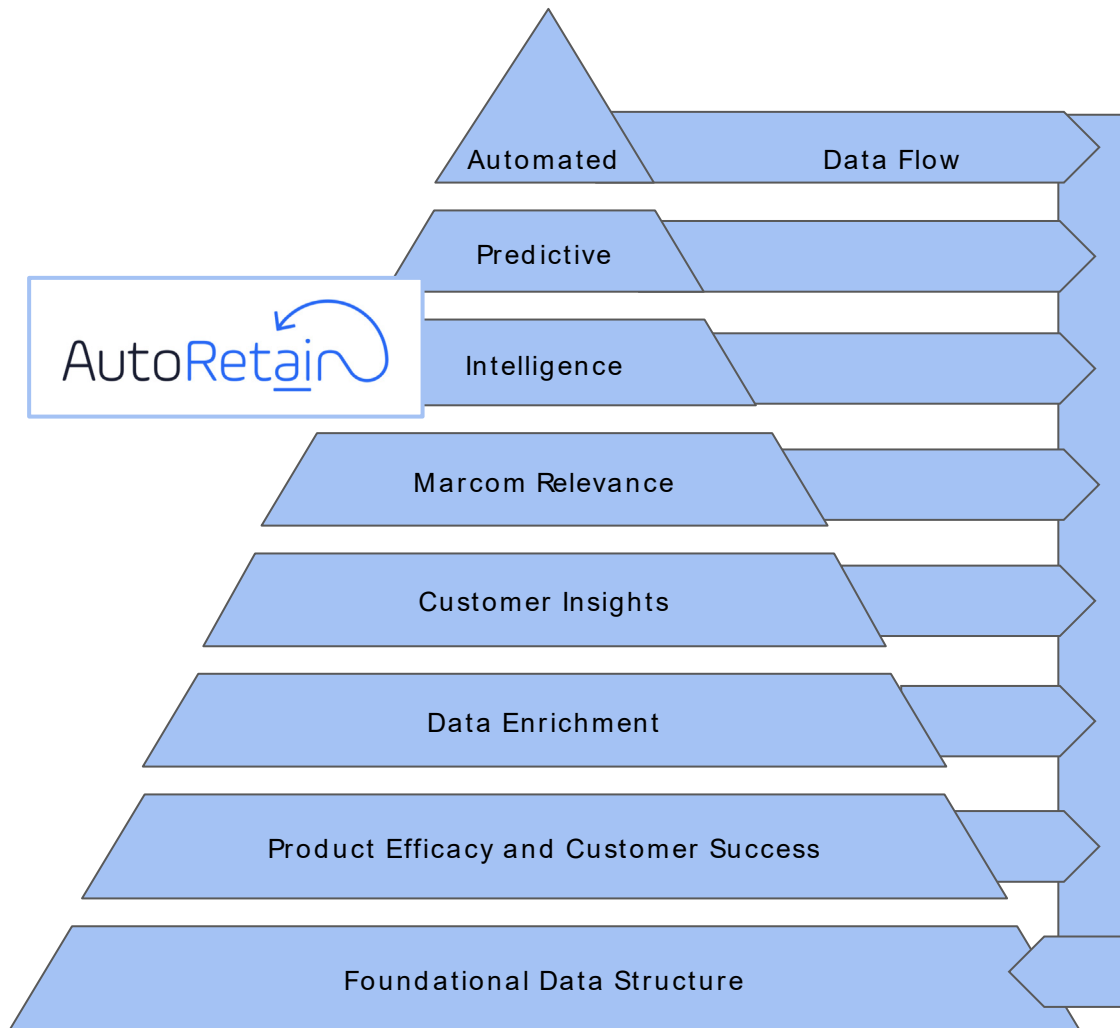
When a customer's actions, such as writing a review or providing feedback, make it easier for the organization to acquire new customers or improve their current product offering, this is called a growth loop.

Growth loops are self-perpetuating systems of continuous improvement.

Each step in an effective growth system creates an enhanced opportunity for monetization and learning.

Retention issues are more multifaceted than paid acquisition. That is for sure, but the roadmap we will expound upon will help prioritize an attack plan, leading to greater customer success, growth, and profitability.

The hierarchy of retention needs



If your data architecture is correctly structured with attributes tied to the user account skip to page 17

How to achieve retention success.



It's not necessary to build out robust foundational data architecture before MVP for the sake of staying lean. However, learning from your MVP cohorts will be compromised without this in place. Data architecture, growth loops, and continuous improvement processes should be "sketched out" at the pre MVP stage so you can start the build-out process upon MVP success.



Lean Startup. JTBD Theory, Agile Development, Growth loops.

From the hierarchy of retention needs, you see that the foundational data architecture is the first step, the repository for all data. The sooner this step is in place, the better. The foundational data system is often referred to as a CDP "Customer Data Platform," and this definition works, providing it encompasses logistics, product data, and pre-customer data as well. Let's look at some must-have elements

Foundational Architecture Elements

The Data Lake

A repository of structured and unstructured data including customer data, product data, operations data, financial data, logistics data, acquisition data, traffic data, marketing campaign data, etc



If in doubt as the value of the data, store it anyway.

The Centralized Customer Table

All attributes of the customer's characteristics, behaviors, and metadata keyed against each customer record.

Machine readability

This is a necessary step for ML and Ai applications and requires data prep and data transformation processes.

Event based architecture

Operations and customer interactions need to feed events that can be connected to the data platform through API's

Data Reporting Export and Visualization platform

Cloud based.

This foundational architecture provides the framework for data driven strategies. The most important application of all this data is the analysis and optimization of factors that affect customer conversion and customer success. Understanding your customer and improving the customer experience is ongoing work which becomes increasingly more complex with time.



Each company dept KPIs dashboard should feed an overall executive management KPI dashboard.

Retention Showstoppers

Lean business planning and agile systems of continuous improvement take consumer data and constantly iterate and optimize the product towards success. This “move fast and improve as we go” mentality works providing you don’t have one of these 3 show stoppers.

Retention efforts will fail if:

1. The need isn’t real - the customer isn’t willing to pay to solve their pain.
2. Your product solution doesn’t fit the need.
3. There is a ubiquitous, more affordable, better choice.

One way to understand your current level of customer success and to double check the effectiveness of your data platform is to perform a 360° retention audit.

The 360° Retention Audit.

The purpose of the audit:

1. Ensure the data platform has adequate data to define and manage customer success.
2. To build out dashboards and KPI's for each area of operation that directly affects customer success.
3. To uncover areas of customer friction, customer diss/satisfaction and to understand the interdepartmental issues.
4. To identify customer data gaps
5. To help prioritize a retention focus optimization plan.



Want to skip over the details of the audit for now
and come back to it later? Skip to page 26

The 360° Retention Audit.

Overall Factors

1. Known retention issues for initiating audit in order of perceived priority?
2. Strengths and weaknesses affecting retention?
3. The current core KPI's used to manage retention?
4. Organisational bias /acquisition/ retention / other?
5. What is the core product differentiator?
6. Rate your effectiveness of keeping your brand promise?

Product Factors

1. Is the product single use or replenishment?
2. What is your top 1st purchase?
3. What is your top 2nd purchase or add on?
4. Is your product seasonal?
5. What are the most important sales attributes of your product?
6. How would you rate your customer value?
7. How well is your product reviewed currently by customers?
8. How could the product offering be improved currently?
9. How enriched are your product descriptions?

Competitive Environment

1. What is your current market share position relative to the competition?
2. Who are the key competitors and what aspects do they compete on?
3. How would you honestly rate your product compared to competitive offerings?
4. How would you rate your pricing compared to competitive offerings?
5. What is your current market share position relative to the competition?

Customer Data

1. Are you currently collecting post purchase consumer insights?
2. Are you currently collection post purchase product feedback?
3. Do you conduct rebuttal quizzes in the sales funnel?
4. How well do you operationalize customer feedback?
5. Do you currently use a CDP or centralized customer householded database?
6. How well are you able to report and extract data from your platform?
7. How effectively can customer data be shared and operationalized internally or externally?
8. What systems currently connect to your customer database?
9. How accurate is your LTV reporting?
10. How easy is it for your to analyze LTV and slice it into unique cohorts?
11. How do you currently segment and classify your customers?
12. What customer behaviors are collected?
13. Do you maintain long term "holdout groups" in order to measure longitudinal lift?
14. Do you have an events based architecture? If so how complete is it?
15. Have you performed customer journey mapping?
16. Do you collect NPS?
17. How well would you rate the organisation at anticipating future customer needs?
18. How well do you think the company treats different customers differently?
19. What missing information about your customers would help your retention efforts?

Operations and Logistics

1. How would you rate the availability of your products?
2. What operations are in-house vs outsourced?
3. How would you rate your supply chain logistics?
4. How do you rate the effectiveness of your suppliers products?
5. What are the main operational KPI's that drive your business?
6. What are the main operational areas of customer friction?
7. How effective are your fiscal controls and communication strategies?

Customers Success

1. How is Customer Success team structured currently?
2. What are the KPI's that drive Customer service?
3. How adequate are your CS early warning signals?
4. What is the ratio of CS agents to customers?
5. What is the ratio of CS tickets to customers?
6. What are the primary ways customers can solve their CS related issues themselves?
7. How would you rate your CS?
8. What tools do you use to maintain CS quality?
9. What is the current returns ratio for your product?
10. How are your CS agents incentivized / goalled / managed?

Marketing Factors - Loyalty Program

1. Do you currently have a customer loyalty program? If so describe.
2. What is the participation rate in the customer loyalty program?
3. What KPI's do you use to measure customer loyalty?

Referral Program

1. Do you currently have a customer referral program? If so describe.
2. What is the level of participation in the referral program?
3. What KPI's do you use to manage customer referrals?

Marcom

1. How effective are your pre and post-purchase communication testing strategies?
2. What KPI's do you use to measure your re-marketing efforts?
3. What advanced ESP features are you currently taking advantage of?
4. How could your remarketing be improved?
5. Are you currently engaged in SMS / push marketing?
6. Which SMS partner are you currently working with?
7. Are you currently engaged in Post purchase Direct Mail?
8. Are you currently digitally retargeting to past purchasers?
9. How effective are your retargeting efforts?
10. What KPI's do you use to optimize your retargeting efforts?

Packaging (Assuming it is a physical product)

1. How would you rate your packaging and inbox experience?
2. What packaging and in-package retention strategies are in place?
3. What KPI's do you use to test and optimize your packaging and in package strategies?

Community

1. Have you engaged in community building?
2. What KPI's do you use around your community efforts?
3. How do you manage communication inside of the community?

Acquisition and Sales

1. How effective are your acquisition efforts at qualifying the customer?
2. What does your acquisition/sales process look like?
3. What are your main sources of traffic?
4. What KPI's do you use to manage your acquisition programs?

Final Questions

1. Do you predict CFV by traffic source?
2. What third-party tools help you manage customer retention?
3. How do organizational limitations inhibit retention currently?
4. What major factors affecting retention have been omitted from this report?
5. What are your current and immediate retention goals?
6. What missing information about your customers would help your retention efforts?
7. How well do you think the organization understands the current retention challenges?
8. How well do you think the company focuses, prioritizes, and addresses customer satisfaction issues?
9. How well do you think the company treats different customers differently?
10. How well do you think the company communicates and plans effective customer retention strategies?

Unable to Answer Questions?

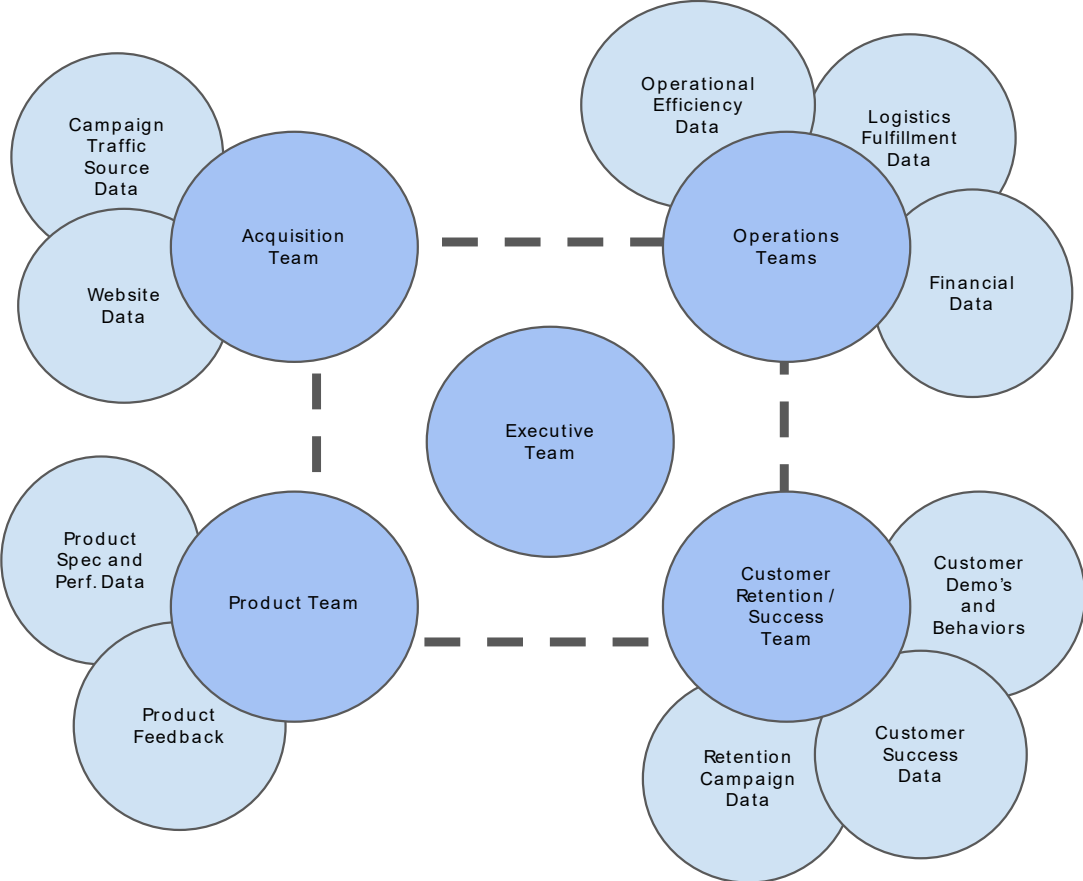
If you are unable to answer questions in the audit or are missing the KPI's to manage an area, then gathering this data and putting these systems in place is an important remedial step.

The audit will help illuminate if the organization runs on KPI's and facts or assumptions. Before operationalizing the data make sure the data is valid through a process of "gut check" then "cross-check".

It will become clear if the information is readily accessible to operational teams during the audit process if its shared transparently, organized and practical.

Retention success is company success, and it requires the organization to unite against a common goal. If KPI's aren't clear or data stuck in departmental silos, then creating a system to share and collaborate is critical.

Effective data structures are centralized and transparent.



Short term fixes and Long term fixes

The audit will illuminate opportunities to improve retention. The next step is how to prioritize the opportunities into a structured plan, a great technique is to rank each issue by M.I.C.E.

M - Multi departmental issue or singular? Subtract the number of departments needed to fix the issue from 10. (higher numbers are best)

I - Impact? Rank 1 to 10 the impact you think this factor will have on retention.

C- Confidence - Rank 1-10 how confident you are that your current resources can enact a successful fix.

E - Rank 1-10 how small, quick, and easy you think the factor is to fix, large, flow hard things receive a low score.

The most important and impactful short term fixes will be those that remove customer friction and make it easier and quicker work with your company. Low customer effort is an important indicator of customer loyalty, and the customers' time is of utmost premium.

High Impact but otherwise low ranking factors typically fall into the top priorities for long term fixes.

A natural starting point for long-term fixes is to work on closing the data gaps.



Be sure to measure a benchmark KPI before and after. Always A/B test major changes. If you're concerned about long-term effects maintain a holdout group that is not exposed to the new strategy.

What is a data gap?

A key question from the audit:

“What missing information about your customers would help your retention efforts?”

Understanding your customer demographics, such as age and gender, are a good basic step, but layering on behaviors creates a much more impactful picture and is far more indicative of your user’s current state.

Ask yourself, Is there a core qualifying question that really helps shape your “ideal type” customer?

The only way to truly know this is to ask the question, gather the event data, and then understand the LTV from customers with different responses. Shining a light on what you don’t know about your customers (your data gaps) is a great step to improving retention.

Closing the Data Gaps.

Often, to get people to convert, we miss out on important qualifying data that signify the customer's value. The answer to one particular question can often lead to dramatically different LTV's from customer cohorts. Answering this question is key to improving your customer segmentation.

Data gaps require a plan to gather the data and close the gap. If your data is fragmented in different systems, you'll need to centralize and structure the data to make it useful and ideally machine-readable.

Having information in disparate systems makes it impossible to build the critical tools and frameworks you need to get the most out of your customers. Assuming the data is genuinely missing, then the next step is data enrichment.



Make sure to consult with a data scientist regarding the taxonomy and machine readability of your enriched data structures



SEO, Product Feeds

Data Enrichment.

Enriched data is an essential step to understand your customers truly. Customers' choices are rarely simple, and as marketers, we spend a lot of time creating differentiation, leading to highly nuanced customer behavior.

The main opportunities for retention data enrichment fall into these four categories:

1. Operational - creating more detail and understanding the steps and processes to generate efficiency optimizations.
2. Customer Classifiers such as demographics
3. Customer Behavior.
4. Product details - The granular product spec and performance details.

Data Enrichment: Taxonomy.

Taxonomy refers to the way of describing a thing. The more detailed and complete the taxonomy, the more nuanced behavior you'll be able to unlock. However, the process of creating and populating deeply detailed product taxonomies is still mainly a manual process.

Typically the more data available to the customer regarding the product, the more purchase confidence they will exhibit. Another side benefit of storing detailed taxonomy in the product meta description is that it can help with SEO.



Typical Under Enriched Product Description

SKU:	23221
Category:	Dress
Color:	Navy
Pattern:	Checked
Brand Name:	Polly
Product Name:	Mesu
Size	M



Enriched Product Description

SKU:	23221
Category:	Dress
Color1:	Dark Navy
Color2:	Blue
Color3:	White
Pattern:	Checked
Brand Name:	Polly
Brand Feedback Score:	4.53
Product Feedback Score:	4.95
Return Ratio	6%
Product Name:	Mesu
Neck Type:	Collar
Arms Type:	Full
Length	Medium
Wrist Type	Cuff
Belt Inc	Yes
Accessorized	No
Model	1233
Shot Type	Standard
Shown With 1	1 23222
Shown With 2	2 48332
Material 1	1 Cotton
Material	2 Polyester
Size	Size M
Fit	Blended Size
Fit Model Notes	M/L
	Loose
	TRUE

Data Enrichment Techniques.

The main techniques for data enrichment are:

1. API
2. Event-based architecture
3. Survey
4. Machine Vision
5. Manual Data Entry

API

If the data exists and can be made available to you from other systems or applications, then pulling that data in through an API is a relatively easy way to enrich your data. A developer familiar with API scripts can help assess the compatibility and potential work involved (middleware) in getting the systems to communicate.

Event-Based Architecture.

A correctly structured site will mean your customer's interactions will trigger a critical insight into the user's behavior and state of mind.

With event-based architecture, it's possible to understand your customer's journey in great detail. Knowing your customer's recent actions with your company (along with any expressed feedback) is vital in knowing your customer's state.

A customer state segment is a combination of exhibited behavior and demographics and is the basis for treating different customers differently.

Survey

The main techniques for data enrichment are:

Surveys come in many forms and are a central component in forming deep customer relationships. A great survey aims to extract and deliver maximum value in exchange for the user's time.

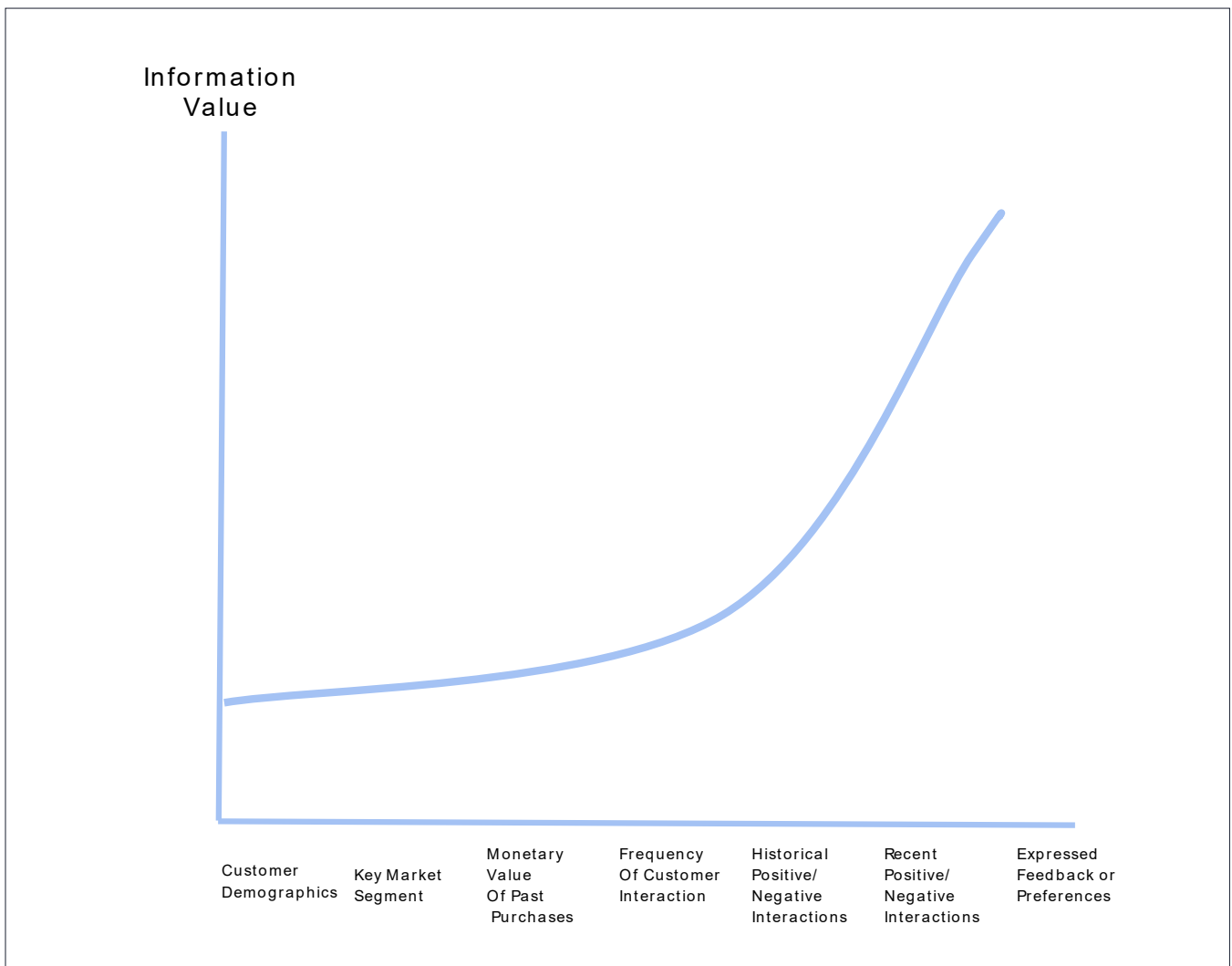
Every interaction with your customer is an opportunity to learn and serve your customers a little better, improving your product and company in the process. This idea replaces the traditional thinking of funnels with loops of continuous improvement.

Machine Vision and Manual Data Entry

A combination of machine vision and manual data entry can be used to help add details and attributes to products. This is an exciting and rapidly developing area of applied ML and Ai. At the time of writing this there is still a considerable human quality control requirement for machine vision systems.

A properly enriched dataset will enable the marketer to improve Marcom's relevance and deliver new insights. Different types of data create different levels of personalization value.

- Customer Demographics
- Key Market Segments
- Observed Customer Behavior
- Monetary Value of Purchases
- Frequency of customer interaction
- Historical interactions
- Recent customer interaction
- Expressed Feedback / Preferences



Marcom Medium / Relevance / Value.

Understanding your customer's state and properly segmenting your messages is key to showing your customers you know them and care. There is no alternative to building a lasting relationship with your customers. If you're not relevant, then you're burning your list and the acquisition dollars used to acquire those customers.

Many companies fail at their retention marketing efforts by burning their lists with irrelevant, low-value email blasts.

Message Score

Before you hit send, a good practice is to develop a subjective message score as an internal barometer as to what the potential impact of sending the message will be. Your scorecard score is your honest assessment of the message contents. The message medium, relevance, and value all play into the message score.

Subjective Message Value Scorecard

+1 Message Value	-1 Message Value
<ul style="list-style-type: none"> • Low Intrusion Message Medium • Low Effort to Consume information • User Controls Message Frequency 	<ul style="list-style-type: none"> • High Intrusion send frequency • High Effort to Consume information • No Control of information sent • Message is Opt Out • Low Relevance
+2 Message Value	-2 Message Value
<ul style="list-style-type: none"> • High Perceived Value of Content • High Personal Relevance • Message was Opt In 	<ul style="list-style-type: none"> • High Intrusion of Message Medium • Low perceived Value of content • No personal relevance.

For Example
 Website Content
 Banner Retargeting
 Email
 Direct Mail
 Push / TEXT SMS

Zero Intrusion
 Low Intrusion
 High intrusion
 High intrusion
 Very High
 Intrusion



The Elements of Value by
 Eric Almquist Et Al - Sept 2016 HBR

Message Goodwill Score.

This is the cumulative value score of the messages you have sent to that customer. Priming your list and setting a great first impression is critical. If your first few messages are irrelevant you will rarely get a second chance and effectively rendering that relationship as dead.

Message goodwill degrades very quickly, and maintaining your customer message goodwill is very much a game of “what have you done for me lately?”. The job of building goodwill doesn’t end at the purchase; that’s where it starts. An excellent opportunity to create goodwill is to reinforce the brand immediately after purchase with a series of messages focused on creating positive brand affinity.

Balancing high-value content before being promotional and not overly aggressive in terms of frequency and medium is a significant way to maintain message goodwill and your list’s overall health.

Increasing segmentation creates an operational overhead, but this cost can be mitigated by understanding each piece of user data’s lift and leveraging behaviorally triggered automated campaigns.

Some examples of great automated BT campaigns which improve retention are:

- Welcome series
- Product engagement series
- Product feedback
- Feedback response
- Winback
- Cart abandon disposition
- CS follow up
- Complimentary product upsells
- Community Impact / Brand reinforcement
- Value added non promotional content
- Churn remediation series

Insights.

After enriching your understanding of the customer and their user state, the next step is to unlock insights regarding your customer's behavior to anticipate and relate to their needs more accurately.

Knowing the preceding events for different customers in different states before the action will help you recognize the antecedent actions. Looking at customer journeys and then correlating triggers or events that are likely to result in an action will help you proactively retain customers.

Recognizing the early warning signs of a relationship going south and taking decisive remedial actions will help proactively prevent brand switching.



Visualize your customer's journey in a Sankey diagram. The further upstream you work, the easier it is to direct customers' flow before their path becomes set.

Insights are typically backward looking, and help illuminate the triggers and activities that lead up to the ultimate action you're observing. Machine learning can be beneficial here in siphoning through the vast amount of attribute data you have on your customers and products to hone in on the series of initial triggers that result in the action. Once you understand the backward-looking insight, you can apply it going forward.

Let's take an obvious example.

Subscription company A.

35% of customers who gave negative feedback canceled their subscription.

80% of customers who gave two consecutive negative feedback canceled their subscription.

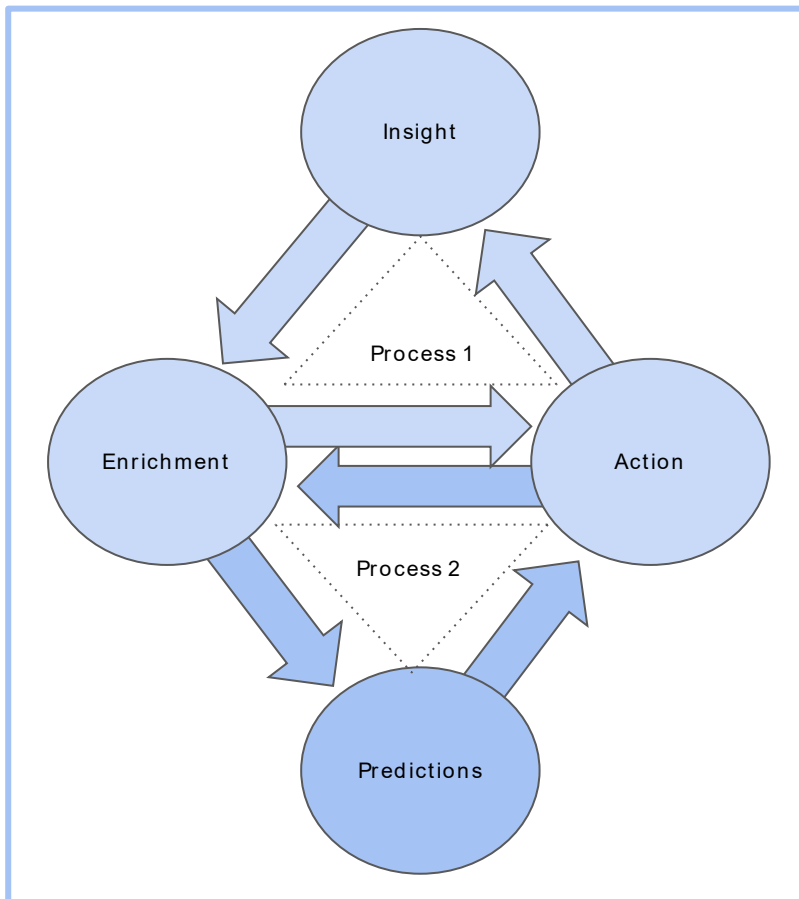
By the second consecutive negative feedback, cancellation is imminent, so radical win back strategies might be warranted to salvage the relationship and brand equity.

Insights mapped against the customer journey are very useful at gauging the effectiveness of your current retention efforts. Suppose loyalty programs, referral programs, save-a-sale strategies, or winbacks are significant. In that case, this should be evident by analyzing the lift generated from these programs vs. holdout groups or customers not exposed to such programs.



Loyalty programs are not easy to switch out. Thus loyalty or referral programs need to be tested against holdout groups before being implemented.

Predictions.



Predictions take what you understand about your customer's actions and predict the probability of a future event. These can be incredibly useful at maintaining a customer relationship and salvaging goodwill before the customer becomes too disenchanted.

Predictions are also a great way to anticipate the customers' needs and help you provide outstanding service.

Predictions can help you course-correct, for instance, you could predict a marketing campaigns LTV based on your enriched understanding of the customer and their actions and adjust spend without having to wait out the time it takes to realize the customer LTV fully.

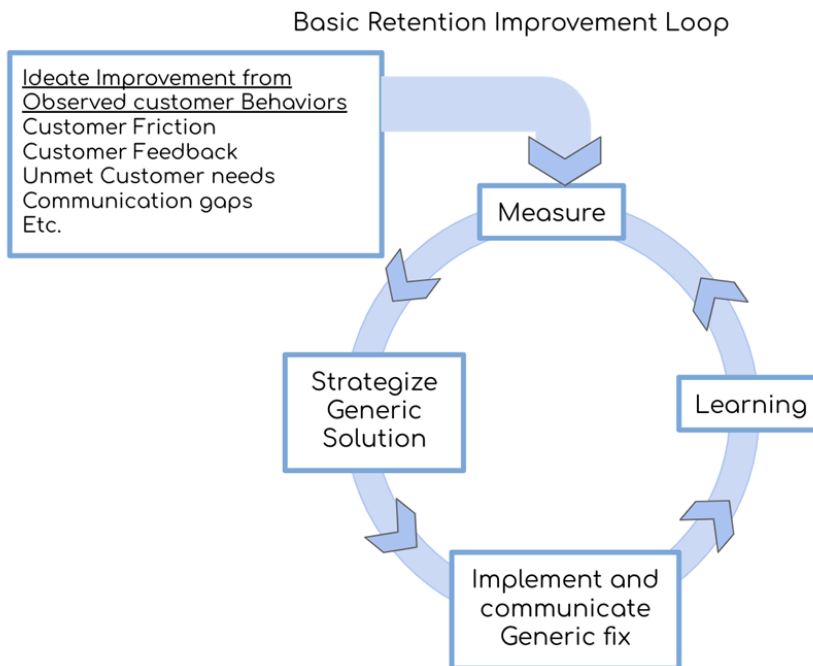
Useful Retention Focussed Predictions.

- Customer Future Value - Predict the future value of a customer cohort and lean into the strong ones.
-
- Churn Prediction - Predict the likelihood a customer will cancel their subscription and proactively save them.
-
- Product Recommendations - Predict the product most likely to satisfy the customer.
-
- Upsell Recommendations - Predict the upsell given the product they are considering.
-
- Replenishment Prediction - Predict when the customer's supply of your product is likely to expire and anticipate that.
-
- Upgrade Prediction - Predict the useful life of your product and proactively suggest a replacement.
-
- Conversion Potential - Predict the likelihood a trial customer will convert to a paying customer.

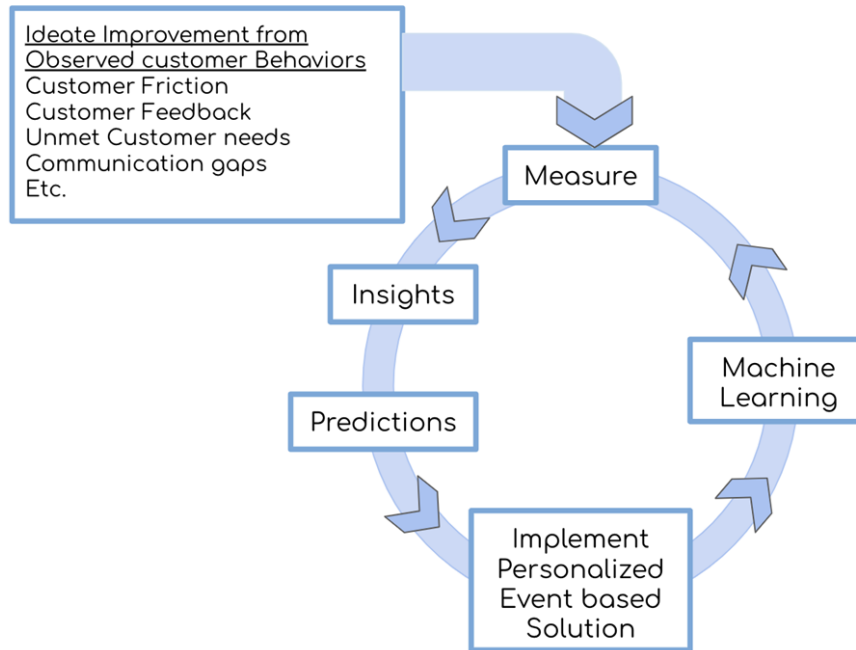
Next-level retention improvement loops.

When using these predictive analytical tools, a great starting point is to approach them from a customer value and customer effort perspective. Predicting the customers' needs and then removing the effort involved in interacting with your company is key to creating customer loyalty.

Moving from a one size fits all program to a personalized events-based retention program will significantly increase your retention programs' effectiveness while making your customers feel understood.



Next-Level Retention Improvement Loop



Next-level retention strategies leverage

ML and Ai to predict customer needs, communicate with relevance, reduce customer effort, and maximize trust and lifetime value. They create efficiency by offering targeted solutions to customers based on their specific needs vs. generic programs. They “listen” and “act” appropriately, enhancing customer success and goodwill, always communicating with relevance in a method suited for the message. They require messages to be programmed out and tailored for specific audiences as defined by their actions.

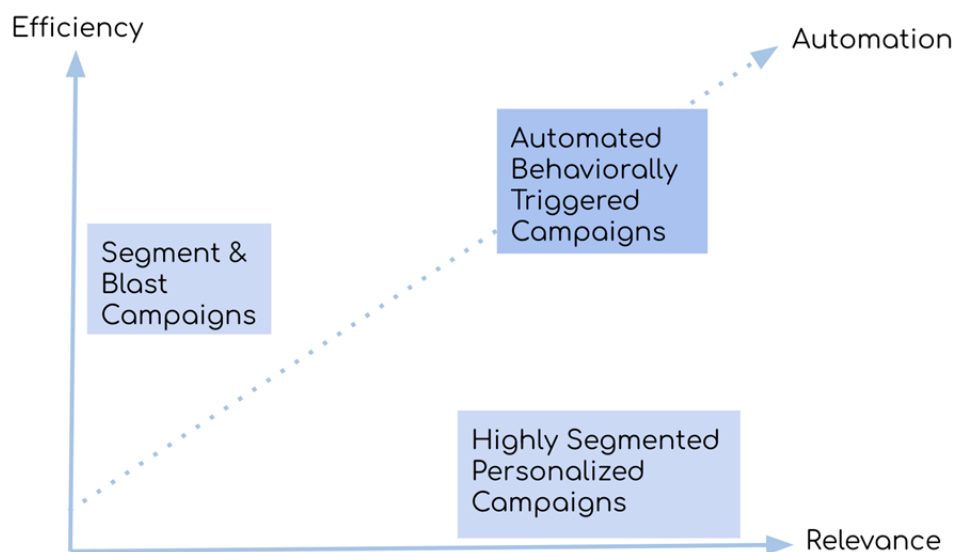
Automation.

Programmed automated marketing responses typically take longer to set up than the traditional “generic blast” type retention communications. However, they provide a much greater return on effort than the conventional communications.

Automating your communication efforts allows retention marketing managers to move from the constant cycle of campaign production to more strategic and efficient use of their time.

Automated behaviourally triggered campaigns result in a more permanent solution that can be optimized and improved over time. When coupled with predictions, they allow the retention marketer to move from reactive to proactive solutions.

Automation must keep pace with personalization if Marcom is to be both relevant and efficient.



In Conclusion

Once you've implemented highly personalized behaviorally triggered automated campaigns leveraging AI and ML, you're truly next-level in your retention marketing efforts. These techniques represent the most incredible level of operational efficiency that's currently available using today's technologies.

Achieving this goal requires foundational steps to be put in place, all of which deliver significant operational value along the way.

The core idea behind all this technology is rooted in the practical and old-fashioned principles of good customer service, implemented in a scalable and efficient way using the technology of today:

3 eternal customer service laws:

1. Keep your promises (as a brand)
2. Make my life easier
3. Hear me, and treat me like a person (not a number)

Allowing these principles to guide your customer retention efforts will keep your strategies and efforts grounded and effective.

Thank you.

If this document has been relevant and useful, please share some Autoretain love on your linkedin profile.

We at Autoretain are standing by to help with any issues relating to your retention strategy.

Got a question?

Visit: www.autoretain.com/question

We wish you the best of luck in implementing your next-level marketing initiatives.

AutoRetain