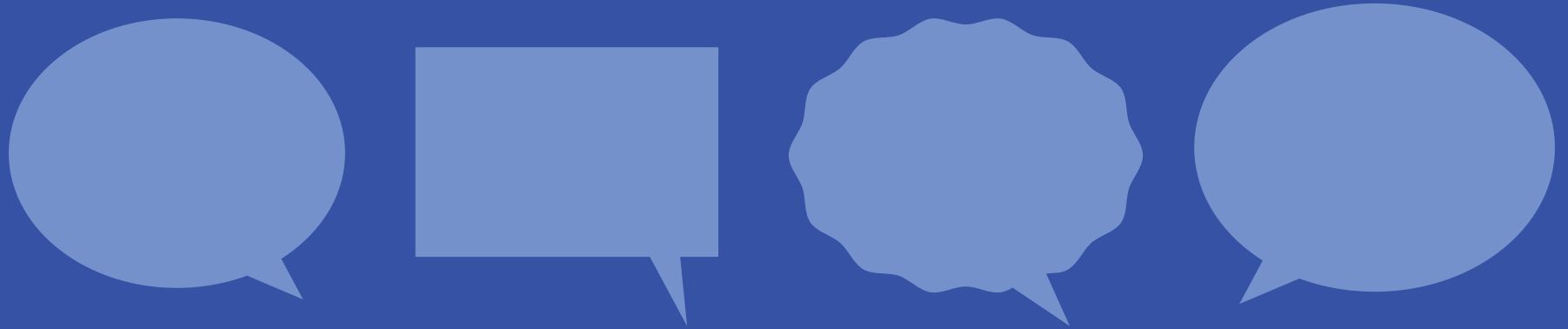
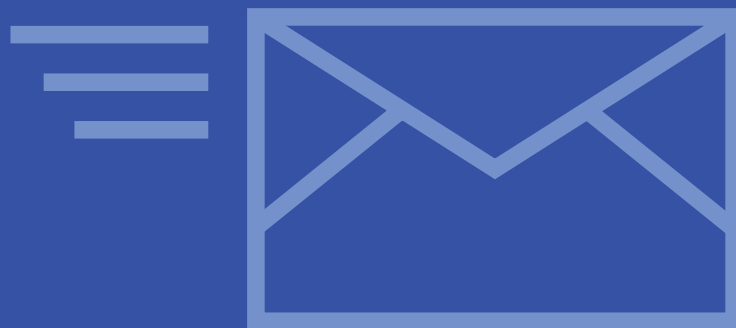




HOW YOUR MESSAGING ACCELERATES THE CUSTOMER LIFECYCLE





Customer loyalty isn't
built by a bunch of
automated messages.
It's built by real
experiences between a
user and a brand.

To get those real experiences, your messaging has to feel tailored to each individual user—who they are, how they use your product, and where they are in the customer lifecycle. Using behavioral data and marketing automation, you can craft really engaging messages that are specific in timing and in content to each user, all at scale.

With the right systems in place, your customers will even feel like they have a [1:1 relationship with you](#)

Data and automation can help you understand signs of intent with your customers so that you can engage them in effective, persuasive ways at scale. How you communicate with people makes a huge difference in whether they go back and use your product to experience value, or make faster progress in the customer lifecycle than they would on their own.

HERE'S HOW TO GET STARTED.

1

Activate Customers with Smarter Onboarding

The default expectation, these days, is that the relationship between Big Company and Little Customer is not 1:1. That's why it's actually **really easy** to connect to people by exceeding their low expectations, starting with onboarding. The way you roll out the welcome mat for new users in these first few points of communication will define the rest of your relationship. If you want a 1:1 relationship with users, you need to start fostering that in the very first interactions you have with them.

The messaging you send needs to provide users with context about what your product can do, and how they can learn the ropes. It needs to set your customers up for long-term success. It makes all the difference between a loyal customer who sticks around and the ones that don't.

In order for the messaging to feel personal and relevant to that specific user, it has to be tied to what actions they've taken within your product. By automating your onboarding messaging and attaching it to behavioral cues, you'll be able to keep a 1:1 relationship at scale from the very first message.

In order for the messaging to feel personal and relevant to that specific user, it has to be tied to what actions they've taken within your product.

Activate Customers with Smarter Onboarding: Tailor Your Welcome Emails

Personalization needs to begin from the first lifecycle email you send, but it's not enough to just stick your customer's first name in the subject line and call it a day. You need to go deeper.

Clearbit does a great job of this. They wanted their welcome email to encourage people to start using the product right away, but since customers have different use cases for the product, there wasn't a single email that would do the trick. So they tailored their welcome emails to different buyer personas.

Developers get a sample of Clearbit's Enrichment API that shows them how they can start using it.

Marketers using Clearbit, on the other hand, get an email that shows them how to use the exact same API, but without any code.

By tailoring their emails to the person reading them, they're much more likely to make a connection to the reader.

Hi Abhimanyu,

Have you checked out our Enrichment API yet? All you need to do is send an email address, and it will return rich data about that person and the company where she or he works. Here's what it looks like:

```
1 curl https://person.clearbit.com/v1/people/email/alex@clearbit.com \
2 -u c9e4c9d7b42eba3230ab20103ce36ee1:
3
4 {
5   "name": {
6     "fullName": "Alex MacCaw",
7     "givenName": "Alex",
8     "familyName": "MacCaw"
9   },
10  "location": "San Francisco",
11  "bio": "O'Reilly author, software engineer.",
12  "site": "http://alexmaccaw.com",
13  "facebook": {
14    "handle": "amaccaw"
15  },
16  "twitter": {
17    "handle": "maccaw",
18    "followers": 14993,
19  }
20  // ...
```

Here are three ways you can get value from this today:

1. [Integrate it with Slack](#) and pipe the fully enriched profile of every sign-up directly into your Slack channel as a real-time feed.
2. Set up lead qualification so that when someone signs up from a potentially key customer, your sales team can pick them up instantly.

Hi Tasnimul,

I wanted to show you a few ways you can start using Clearbit without building any technical integration. For some customers these solutions are sufficient on their own, and for others they are a great way to kick the tires before committing to an API integration.

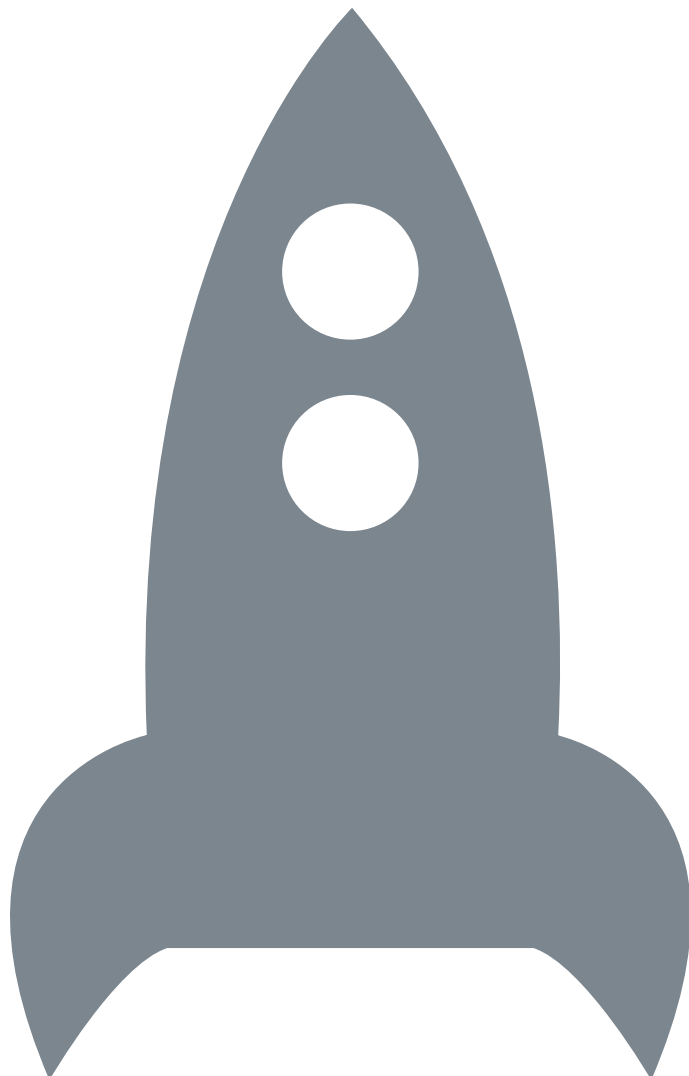
We actually put together a whole blog post about this specific thing:

[How to use Clearbit's APIs without writing code](#)

Here are a few direct links to ways you can get started without writing code:

- [Salesforce](#): always have the latest and most detailed information about your leads and accounts.
- [Slack](#): pipe the fully enriched profile of every sign-up directly into your Slack channel as a real-time feed
- [Google Sheets](#): Automated lead-gen and research directly in Google Sheets

If you have any questions about the Enrichment API or Clearbit, don't hesitate to reach out to me directly.



Activate Customers with Smarter Onboarding: Use an Event-Triggered Onboarding Flow

Onboarding is about coaching your new users into becoming power users. One tried-and-true method is to send a drip email campaign that teaches users about different features, and nudges them to explore and try the features out.

But if you send that same drip email campaign to everyone, you're sure to alienate people from your product. If you send several emails telling users to try installing the native app and a lot of them already did, you're just going to look like you don't care about those people. **Your 1:1 relationship is totally blown.**

That's why event-triggered onboarding is so powerful. By developing an event-triggered onboarding flow with Customer.io, StatusPage.io increased their trial to paid conversion rate by 2.4x.

Users will feel like
you understand how
they're using your
app, which makes the
relationship feel 1:1.

StatusPage.io mapped out what they wanted onboarding to look like, and sent the following emails, depending on what actions users took (or didn't take) within the product:

- ☒ **DAY 2 and then DAY 30 if no action**:**
Nudge to add StatusPage.io activity to team chat
- ☒ **DAY 3 and then DAY 45 if no action**:**
Nudge to set up metrics
- ☒ **DAY 5 and then DAY 60 if no action**:**
Nudge to set up third-party infrastructure component status
- ☒ **DAY 12 and then DAY 75 if no action**:**
Nudge to create an incident template
- ☒ **DAY 16 and then DAY 90 if no action**:**
Nudge to create a component group to organize page

Each of these pairings is conditional. The first one will send automatically, but the second one only happens if users didn't take the suggested action. The incident template campaign, for example, sends on day 12 but only on day 75 if users haven't entered the segment "has created a template."

Users will feel like you understand how they're using your app, which makes the relationship feel 1:1.

Activate Customers with Smarter Onboarding: Send them a Welcome Postcard

One great way to establish a 1:1 relationship during onboarding is to send a postcard that's triggered by user behavior, like signing up for your product.

Lob can send a physical postcard to your new customers to welcome them. And with Customer.io Actions, you can add this (and many other) kinds of communication into your messaging. With Customer.io's **[new Action for Lob](#)**, you can add postcards into the mix by easily set up a recurring trigger so that new customers get a welcome aboard postcard from you.

It feels even more personal than email, which means you can build fundamentally human connections at scale via data and behavioral marketing.

TEST ENVIRONMENT

Getting Started? Search for postcards, letters, etc...

psc_c64e05217214363f

What a fancy postcard

Test Postcard Completed:



Hi John, Thanks for being our customer!

THE CUSTOMER.IO GANG
921 SW WASHINGTON ST SUITE 820
PORTLAND, OREGON 97205

POSTAGE
INDICIA

JOHN ALLISON
921 SW WASHINGTON ST #820
PORTLAND, OR 97205

VIEW POSTCARD

RECIPIENT	SENDER
John Allison 921 SW Washington St #820 Portland, Oregon 97205 United States adr_a4d7cea97026fe83	The Customer.io Gang 921 SW Washington St Suite 820 Portland, Oregon 97205 United States adr_1beddfde39c35ce

EVENT	ZIP	DATE
Scan data will appear here for a Live postcard.		

2

Boost Retention with the Right Behavioral Nudges

Acquiring customers is only half the battle. The real challenge is keeping them. As Brian Balfour, founder of Reforge and former VP of Growth at HubSpot says, “Growth is good but retention is 4ever.” In order to see healthy retention numbers, you can’t forget about your users after onboarding. You need to create a long-term relationship with your users.

You need to keep nurturing the relationship so that customers want to keep working with you, upgrade their plan, and recommend you to their friends. Your messaging is one of the most powerful tools in your arsenal to build this kind of deep, long-term relationship.

In order to see healthy retention numbers, you can’t forget about your users after onboarding.



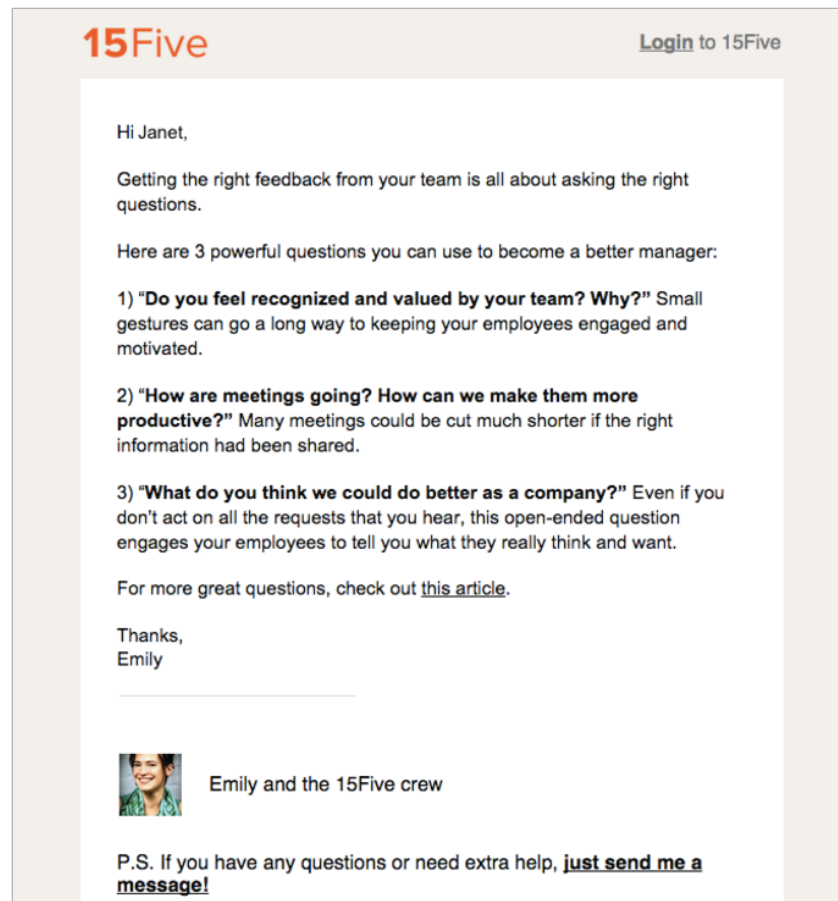
Boost Retention with the Right Behavioral Nudges: Reactivate Users with Drip Email

A lot of marketers assume that trial leads who lose interest and never converted are gone for good. But they're missing out on a massive potential source of revenue.

Launch an email drip campaign to reactivate these users. Since they took the time to download and actually use your product, they've proven that they're interested—they just need more 1:1 nurturing. 15Five did this by launching a re-engagement campaign with their lost free trial users.

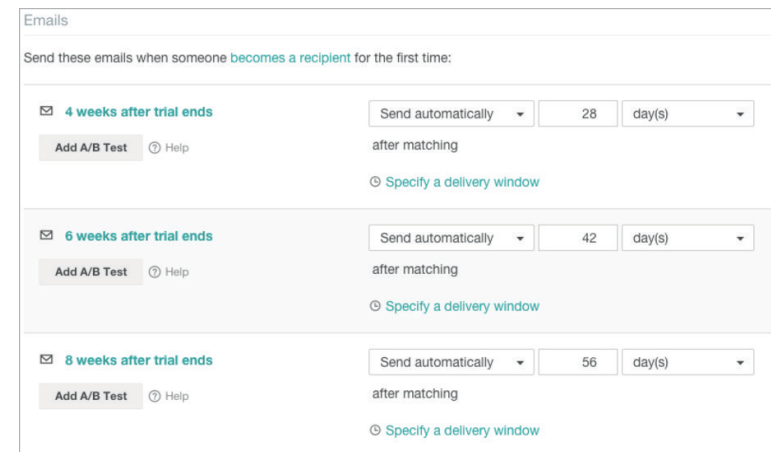
As Luke Ryan, Director of Growth at 15Five told us, “A lot of 15Five trial [users] were not ready to integrate the product into their teams, but that's not to say they aren't interested in becoming better managers or leaders. Providing this group of people with helpful content around that theme is a useful way to stay in touch until they are ready to take on 15Five.”

Luke created a drip email campaign with a series of five emails over a 4-to-12 week window that provided educational content to teach people how to become better managers and leaders, like this one.



Since user took the time
to download or sign up—
and actually use your
product—they've proven
that they're interested

If customers matched the criteria, they received an email from Customer Success Manager Emily Diaz, which meant it felt personal but still scaled.

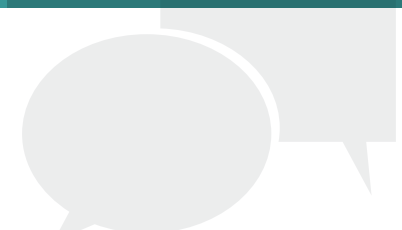


Emails

Send these emails when someone [becomes a recipient](#) for the first time:

 4 weeks after trial ends Add A/B Test Help	Send automatically 28 day(s) after matching Specify a delivery window
 6 weeks after trial ends Add A/B Test Help	Send automatically 42 day(s) after matching Specify a delivery window
 8 weeks after trial ends Add A/B Test Help	Send automatically 56 day(s) after matching Specify a delivery window

As Luke noted, Emily actually received a bunch of personal responses from people clicking on the “send me a message!” CTA, including specific questions that the customer success team could answer, driving even further value for the customer. Even though they weren’t customers, they’re back on the path to reactivation, since they had made a deeper connection.



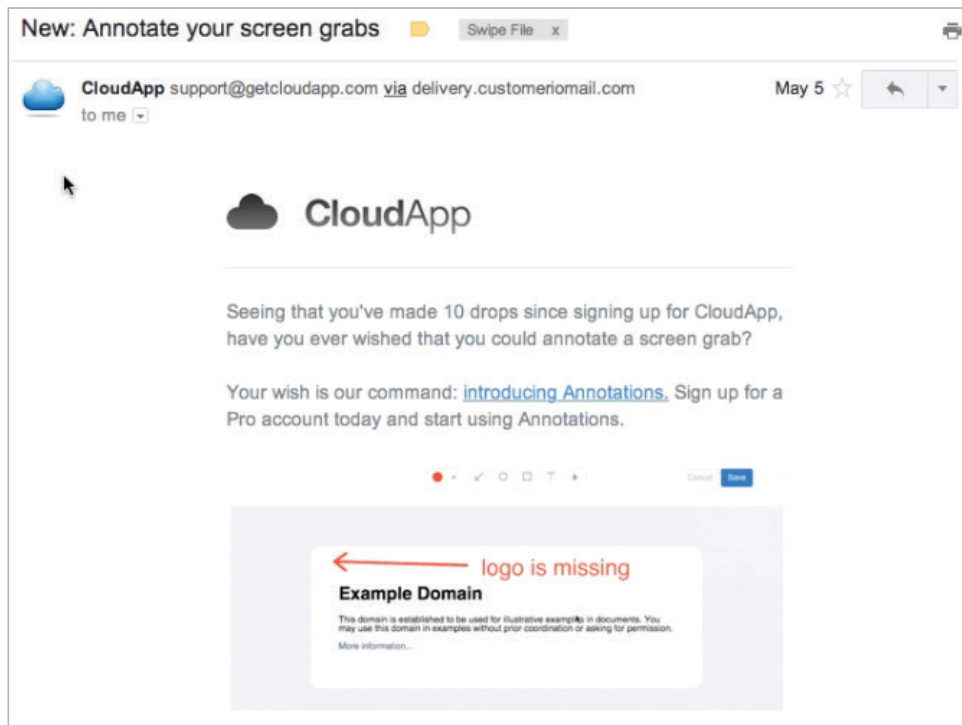
Boost Retention with the Right Behavioral Nudges: Send customer-specific Product Updates

Another common retention technique is to teach users about product updates. It seems only logical that if users left because you didn't have a certain feature, they might regain interest when you can offer it to them, or that all your users want to learn about everything they can do within your product.

But a lot of marketers make the mistake of spamming their entire email list every time they update their product. Yes, you're excited about that new feature you've been working on rolling out for months. But not all your users will be, and spamming them is a sure-fire way to get people clicking the "unsubscribe" button.

Instead, use event-based behavior to determine which customers will actually use the new feature, and then only email that subset. CloudApp does that really well in this email, where they only send it to users who have made 10 drops since signing up.

Since they understand that these users might be interested in the new feature, the content of this messaging is likely to apply to them.





There are a number of Customer.io Actions that can prompt your Customer Success team to reach out at exactly the time they need to. Here are some to get you started:

- ▶ **Create a Help Scout ticket** when customers reply to your emails. It minimizes the steps for them, and makes sure that nothing slips through the cracks.
- ▶ Send an **NPS survey with Delighted** or **Promoter.io** two weeks after a user made an account



Boost Retention with the Right Behavioral Nudges: Loop In Customer Success for At-Risk Customers

Even when operating a 1:1 marketing relationship at scale using technology, sometimes it's best to get a real human involved—especially when the stakes are high. There are some things that just can't be automated 100% of the time, which is where departments like Customer Success, support, and sales come in.

Even if you can't automate that transaction, you can automate the handoff. With Customer Success, for example, it's important to reach out to customers before they churn. But if you're not speaking to everyone regularly, it can be hard to know when to reach out.



By automating the handoff, your Customer Success team can reach out with surgical precision at exactly the right time, before someone churns.

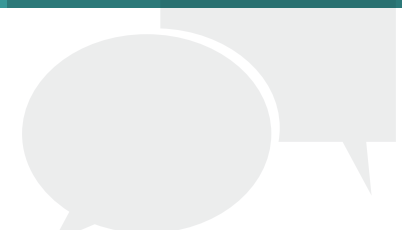
3

Optimize Your Messaging to Improve Conversions

In order to see higher conversions through your lifecycle emails, you need to be able to track exactly when people are converting, and why. This gives you the ability to truly nail your messaging for one of the most important stages of the customer lifecycle: conversion.

Ask someone to pay for your product too early, too late, or with the wrong kind of messaging, and you might undo all the hard work you've done in building up a 1:1 relationship.

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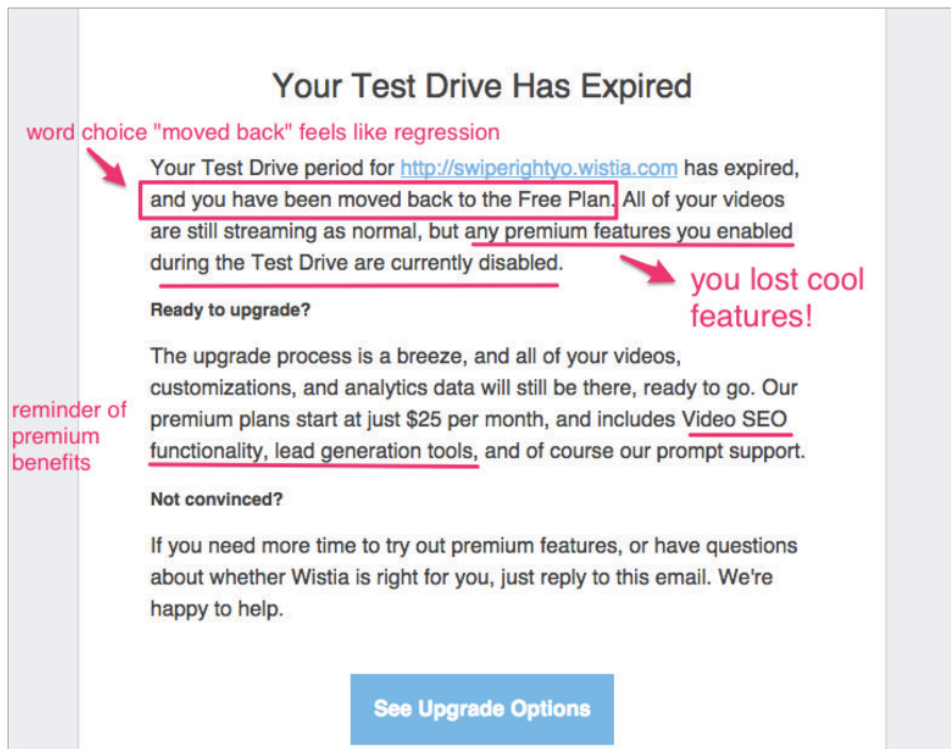
Optimize Your Messaging to Improve Conversions: Send Great Conversion Emails

The way you prompt a conversion is incredibly important, which is why you need to write great copy in your conversion messaging, whether it's a push notification to tell someone their free trial has expired, or an email asking them to upgrade.

The way you deliver information matters—a lot. When asking someone to make a choice (upgrade or let the plan slip), and you want them to choose upgrade, you need to be as concrete as possible.



This email from Wistia does a great job of exactly that. It's super specific about all the benefits users get out of using the product, and what they'll lose if they don't upgrade now.



If you need a bit of help writing your own, check out our [templates for how to write upgrade emails](#).



Hi Colin Nederkoorn,

This is a friendly reminder that your mention quota has been exceeded.

In case you do not want to wait 29 days until its renewal, you can always **increase your quota** or **invite friends** to get 100 extra FREE mentions per month!

Invite friends

Increase your quota

2 choices for how to convert

Optimize Your Messaging to Improve Conversions: Usage-based push to convert

Sometimes, a conversion point happens sooner than the end of a trial. The social monitoring tool [Mention](#) gives all free trial users a quota of how many mentions they get per month.

Once they've reached that quota, they automatically receive an email from Mention telling them that they won't be able to use the tool anymore, for another 29 days, unless they take action *now*.

Note that they offer not just one but two simple ways to increase your quota — upgrade to a paid plan or invite new users. By using concrete copy, like Wistia's upgrade email, they tell users exactly what they need to do to keep using this awesome tool that they've demonstrated interest in.

Your messaging needs to strike while the iron is hot. Event and behavior tracking lets you time messaging with surgical precision at exactly these moments. Your active users—the ones who have hit their monthly quota and are clearly receiving value—will be surprised that the trial ran out, and eager to take action now.



Here's how you can use Customer.io Actions to automate the handoff between behavioral messaging and your actual team members:

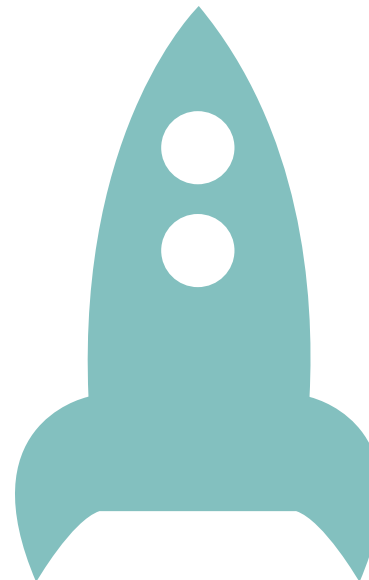
- ▶ Add a lead to Close.io after capturing someone's email address. That way, the sales team can track them from the very beginning, and reach out when they need to.
- ▶ Set up a Slack notification to ping your sales team when a user downloads marketing materials. If your research indicates that downloading this one whitepaper often means someone is ready to buy, then your sales team can strike while the iron is hot.



Optimize Your Messaging to Improve Conversions: Get Sales Involved

Like with customer support, it's important to get a person involved in some scenarios, but only at the exact right time. Unlike automated messaging, your sales team can reach out and provide the personal touch that it takes to get conversions out of some companies.

Your sales team can talk to customers on the phone, listen to their pain points, and connect them with concrete use cases or case studies that might help them convert. But if it's coming at the wrong time, a touch from a sales person will just feel annoying.



MAKE YOUR MESSAGING ABOUT THE CUSTOMER

WE ALL HAVE LIMITED ATTENTION SP...SQUIRREL!!

In order to make your message feel relatable, it has to be tailored to that user's experience with your product.

It can be hard to remember that when it comes to your customers. Sure, you spend time thinking about your product all day. Conversations about the new feature rollout are second nature to you, and you love teaching people how to explore the UI. It seems only natural, you assume, that your customers would like it too.

But for your customers, all this exciting messaging about your product oftentimes just feels like noise.

In order to make your message feel relatable, it has to be tailored to *that user's* experience with your product. How does this message relate to them, specifically? Why should they care about this email you're sending?

That's why tracking behavior and sending data-triggered messages is so powerful. By automatically relating your messaging to how a user has experienced your product, your message feels tailored, relevant, and interesting. It's much more likely to cut through the noise and be worth their attention, which is crucial to building a long-term relationship.