

OPTIMIZE THE CUSTOMER JOURNEY

Top-performing companies are

50% MORE LIKELY

to optimize the customer experience through effective **engagement, retention, and advocacy** campaigns.

HERE'S HOW THEY DO IT

STEP 01: Create an Enjoyable Onboarding Experience

Develop a customer-first approach so your customers feel like they are a priority from the onset.



of **satisfied** customers note that a business prioritized their needs



of **unsatisfied** customers said a company failed to prioritize their needs

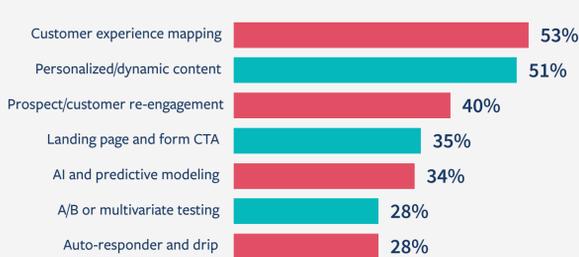
Enter new customers into an onboarding email program with links to informative and educational content like **eBooks, podcasts, and videos**.

STEP 02: Engage Customers with Marketing Automation

Use marketing automation to launch various marketing tactics — including **email, gated landing pages, and social media** campaigns.

64% OF MARKETERS list email automation as their most utilized marketing techniques

most effective marketing automation tactics



Segment your customers based on their interests and behaviors, and then send relevant content to those respective audience segments.

STEP 03: Deliver Critical Communications

Keep customers in the loop regarding critical communications, such as **product and company updates, scheduled maintenance, and new features**.



of companies believe customer retention is the biggest marketing automation benefit



of companies spend less than a third of their resources on content aimed at customer retention

Taking the time to inform customers of important and relevant information will improve their perception of your brand.

STEP 04: Develop Customer Scoring

Similar to lead scoring, customer scoring helps you ensure customers stay happy and helps you act upon your cross-sell and up-sell strategies.

POSITIVE ACTIONS

great feedback, email engagement, content downloads, frequent product or service usage

NEGATIVE ACTIONS

poor feedback, complaint tickets, negative reviews, little or no product or service usage

Scoring customers based on their behavior will prevent you from having to take more drastic and expensive measures to retain them in the future.

STEP 05: Nurture Existing Customers

Segment your customers into three distinct buckets (**Advocates, Neutrals, and Detractors**) and provide content that aligns with their sentiment.

personalized marketing can yield up to

5-8x ROI

personalized marketing can result in a

10% INCREASE IN SALES

Nurture unhappy accounts back to health with highly personalized nurture email campaigns based on their interests and level of satisfaction with your brand.

STEP 06: Match Customers with New Products and Services

Segment existing customers based on products or services they can benefit from.



likelihood of selling to **new prospects**



likelihood of selling to **existing customers**

Guide your customers to information explaining how new solutions can solve their current challenges and help them succeed.

STEP 07: Establish Referral and Advocacy Programs

All customer engagement tactics should ultimately motivate customers to become **evangelists** for your brand.

- 1 identify advocates based on lead scoring and surveys
- 2 call or email promising contacts asking if they will provide a positive reference
- 3 create automated email programs about upcoming opportunities, events, features, and services

A customer reference can make or break your deal, so it's in your best interest to have one available at a moment's notice.

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