

# Customer Journey Inspiration Guide





Marketers are always looking to increase efficiency – it's just part of our DNA.

And by the same token, we want to create personalized experiences for our customers, too.

The solution? Automated customer journeys.

While newsletters and one-off email campaigns will always have a place in your email marketing strategy, customer journeys are worth prioritizing. They enable you to send emails automatically based on triggers you define.

The perfect customer journey tracks the path your customer takes as they interact with your business; from encountering your brand for the very first time to engaging with your communications and beyond.

Customer journeys and marketing automation go hand in hand to ease your buyers' transition through the funnel, increasing engagement and building deeper relationships along the way.

*Let's dive in.*



# Types of Marketing Automation

In marketing strategy, the two most common types of email automation are drip campaigns and triggered campaigns.

**DRIP CAMPAIGNS** consist of a series of pre-scheduled emails sent to subscribers over a specific period of time.

## Characteristics:

- **Scheduled:** Emails are sent at predetermined intervals, regardless of recipient behavior.
- **Fixed sequence:** The sequence and content of emails are planned in advance.
- **Consistent:** The messages follow a logical progression, guiding recipients through a funnel.

## Popular Use Cases:

- **Welcome series**
- **Onboarding**
- **Product education**

Example: A new subscriber receives a welcome email immediately upon signing up, a follow-up with an introduction to your products 2 days later, and a discount offer one week later.

**TRIGGERED CAMPAIGNS** consist of automated emails sent in response to specific actions taken by the recipient.

## Characteristics:

- **Behavior-based:** Emails are triggered by recipient actions such as clicks, purchases, or website visits.
- **Dynamic timing:** The timing of emails depends on when the triggering action occurs.
- **Highly personalized:** The content is tailored based on the recipient's actions or behaviors, allowing for a higher degree of personalization.

## Popular Use Cases:

- **Abandoned cart reminders**
- **Post-purchase follow-up**
- **Re-engagement series**
- **Personalized recommendations**

Example: A customer abandons their shopping cart and receives an email reminder about the item left behind a few hours later, followed by a discount offer if they still haven't purchased it after three days.

You can use both types of marketing automation in tandem to bolster the impact of your email campaigns.

# The Benefits of Automated Customer Journeys, *at a glance*



## Improved Customer Experiences

You're able to tailor interactions based on the customer life cycle stages, preferences, and behaviors, leading to more timely, relevant messages.



## Higher Conversion Rates

By delivering the right message to the right person at the right time, you'll separate yourself from the one-size-fits-all offers of some competitors – a recipe for better engagement.



## Increased Retention & Loyalty

With campaigns that continue to deliver relevant messages after the initial purchase, you'll be able to maintain engagement to foster long-term relationships and repeat business.



## Cost & Time Savings

By identifying the most impactful touch points for your business, you'll be able to allocate resources more efficiently. And with automation on your side, you can say goodbye to the time-suck of manual email sends, too.



# Setting Up Your Customer Journey

Okay, so customer journeys are promising. Heck, you might even be using them in some capacity right now. But what's the best way to go about setting them up?

Here's the process, broken down into five steps.

## 1. Define your goal

Take a step back and consider your overarching goal. Are you looking to convert new subscribers into customers? Build anticipation for an upcoming product launch? Raise brand awareness?

The answers to these questions will help inform your email design and copywriting strategy. And knowing them ahead of time will help you identify KPIs, too.

## 2. Assess your data

How rich is your customer data? Are you working with just names and email addresses, or do you have birthdates, past purchase history, and customer-identified interests, too?

As you learn more about your customers, your opportunities to create more personalized messaging sequences will increase. But don't fret if you're light on data. There are simple strategies you can begin implementing today to enrich your insights.

These include:

- **More thorough subscribe forms:** The first touch is a great opportunity to learn more about your subscribers. Consider going beyond the standard form fields and asking about interests, preferences, and motivations. The answers to these sorts of questions will yield valuable customer data.
- **Surveys, polls, and quizzes:** Better subscribe forms will be useful for new subscribers, but they won't do much for existing ones. This is where interactive experiences, like customer surveys, come into play. Keep them short, sweet, and intuitive for best results.

Need some extra insight into the art of creating a customer survey? Check out our free guide [here](#).

### 3. Define the triggers and rules

With a clear goal for your automated emails and the right data to power them, the next step is to define the trigger(s) and rule(s).

Triggers refer to the criteria that start the automated journey, while rules define what happens during the journey. For example, if your goal is to make each subscriber feel special on their birthday, the trigger might be “anniversary of a date” and the rule might be “send an email containing a discount” on that date.

### 4. Define the content and offers

Bearing in mind the goal you set in step one, it’s time to think through the content and offers you want to send in your automated emails.

If you’re trying to convert new subscribers into customers through a welcome email, then you may want to include content that thanks them for subscribing and offers them a discount on their first purchase.

If you’re trying to remind recipients to book an appointment or service, then you’ll want to include content that makes it clear to them why they need to book, and a clear call-to-action button to make said booking.

### 5. Build your journey in your email marketing platform

At this point, you’re ready to begin building out your journey!

The technical process will vary from platform to platform, but beware: not all providers will allow you to create seamless journeys. If you find yourself in that camp, just reach out to **Marigold** – we have the technology and services you need to automate your email journeys (and a whole lot more, too).

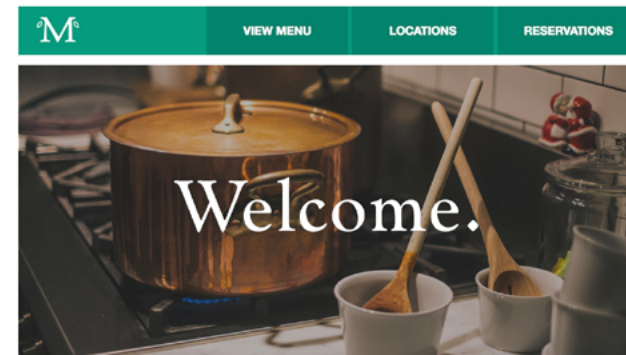




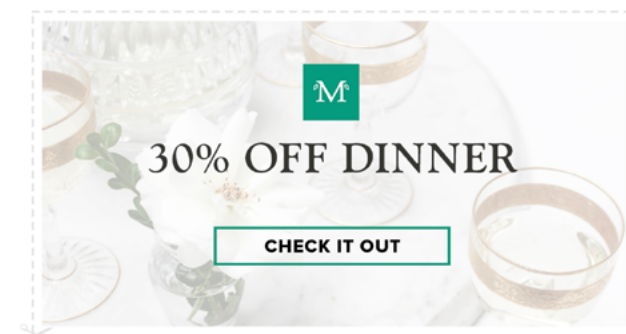
# Customer Journey *Ideas*

## Welcome Series:

A sequence of emails sent to new subscribers to introduce them to your brand, products, or values. This series often includes a thank you email, an introduction to your products/services, and sometimes a special offer.



Welcome, you've been added to our mailing list and will now be among the first to hear about new menus, big events and special offers. As a special treat, enjoy **30% off** your next dinner in our restaurant. Make sure and download our coupon below. Thanks, we hope you enjoy!



Button

Don't miss out on this amazing offer!



## Onboarding Series

Similar to the welcome series but more focused on helping new customers get started with your product or service. It may include tutorials, tips, or guidance to ensure they know how to use what they've purchased.

COCO CAFÉ

WELCOME TO COCO REWARDS!



**Treat Yourself**  
& earn points doing it!

Let's get you started earning Coco rewards. The first step is downloading our mobile app. From there, easily order ahead, choose your payment by entering your payment information, or using pre loaded money from your account.

Your points will quickly add up to some tasty rewards! Earn things like free drinks, free pastries, and birthday treats.



**Pay with cash, credit, or debit cards\***  
1 star per \$1 spent

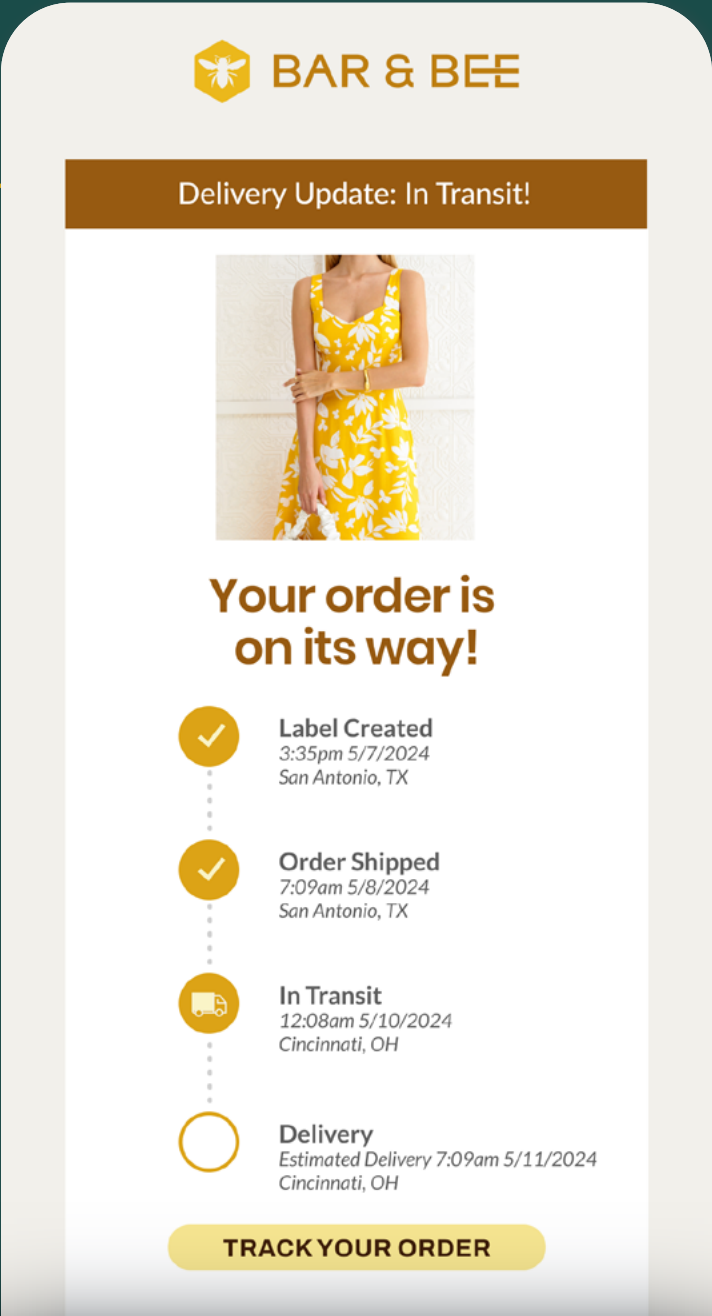
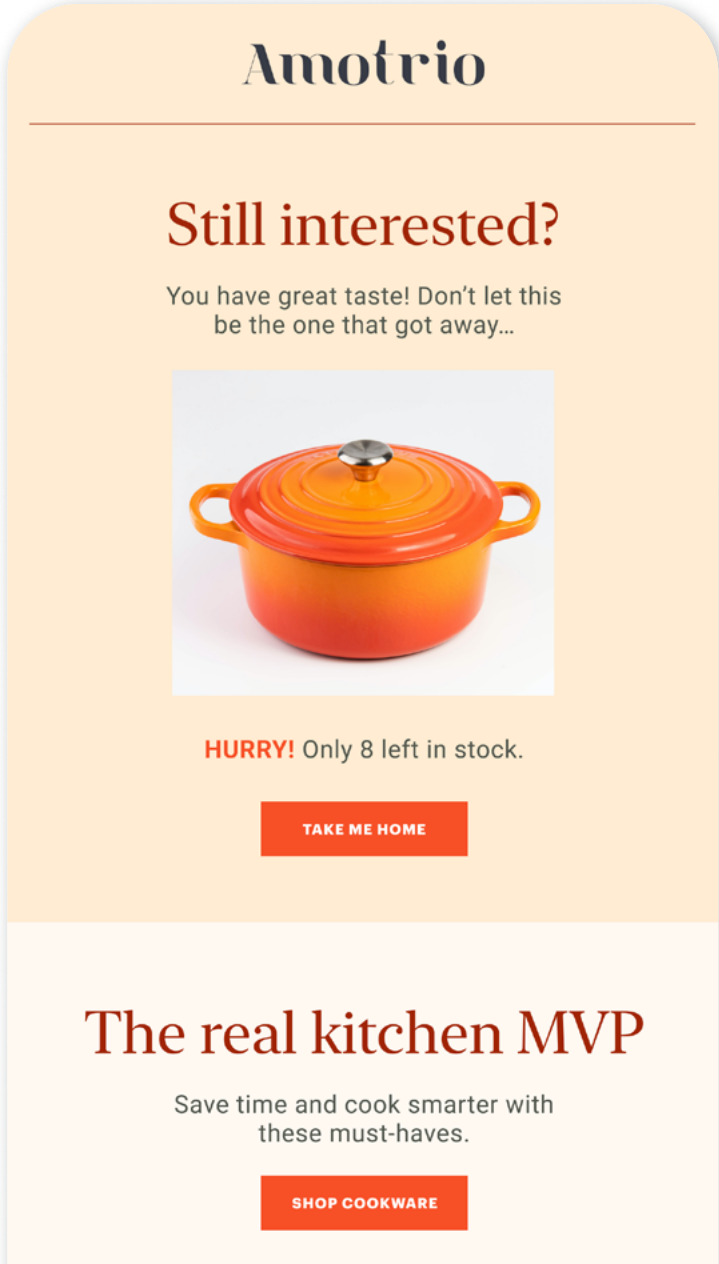


**Pay with cash, credit, or debit cards\***  
1 star per \$1 spent

**GET STARTED →**

# Abandoned Cart Recovery

Emails sent to customers who have added items to their cart but didn't complete the purchase. These emails typically include reminders, product images, and sometimes incentives like discounts or free shipping to encourage completion.



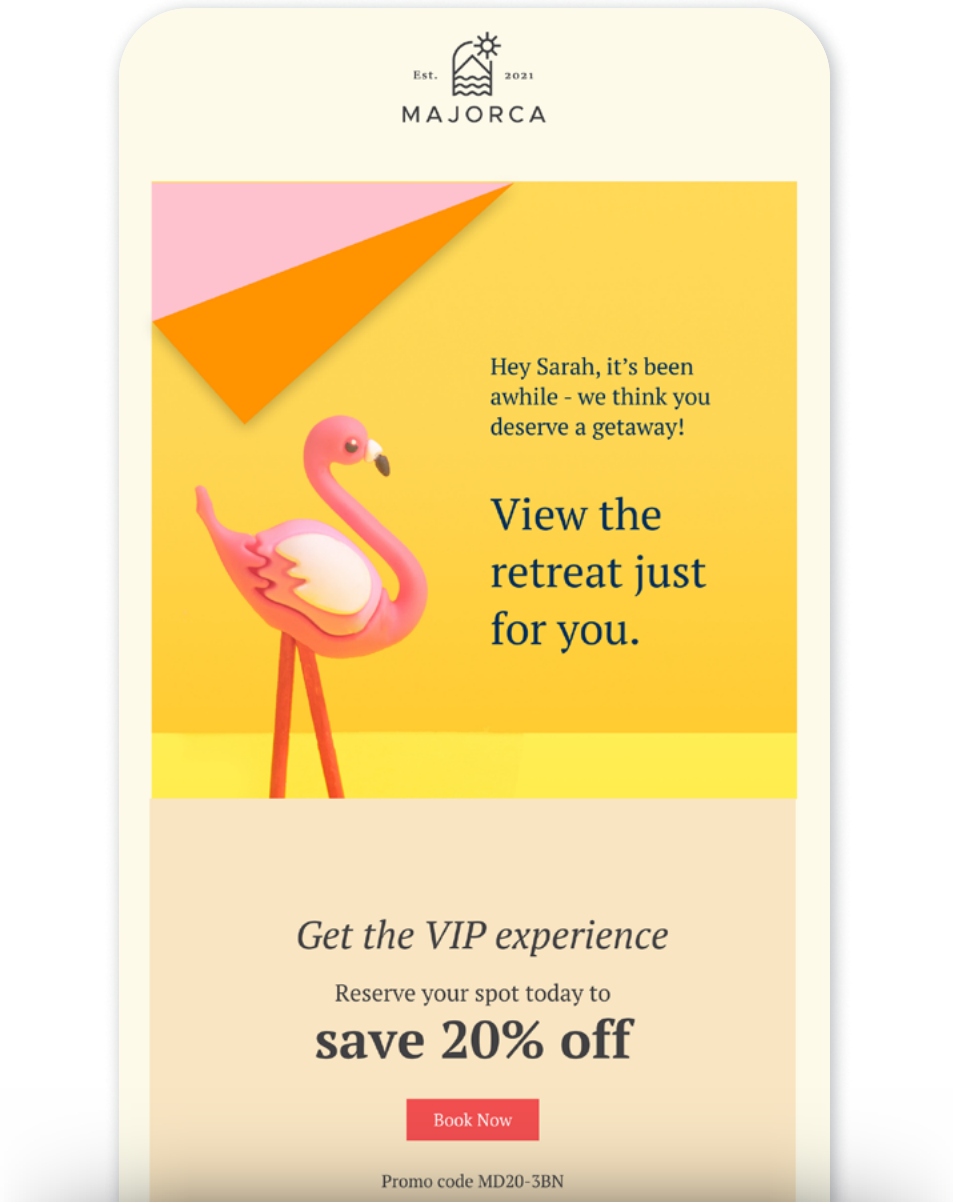
# Post-Purchase Series

A follow-up sequence sent after a customer makes a purchase. It often includes order updates, product recommendations, and requests for reviews or feedback.



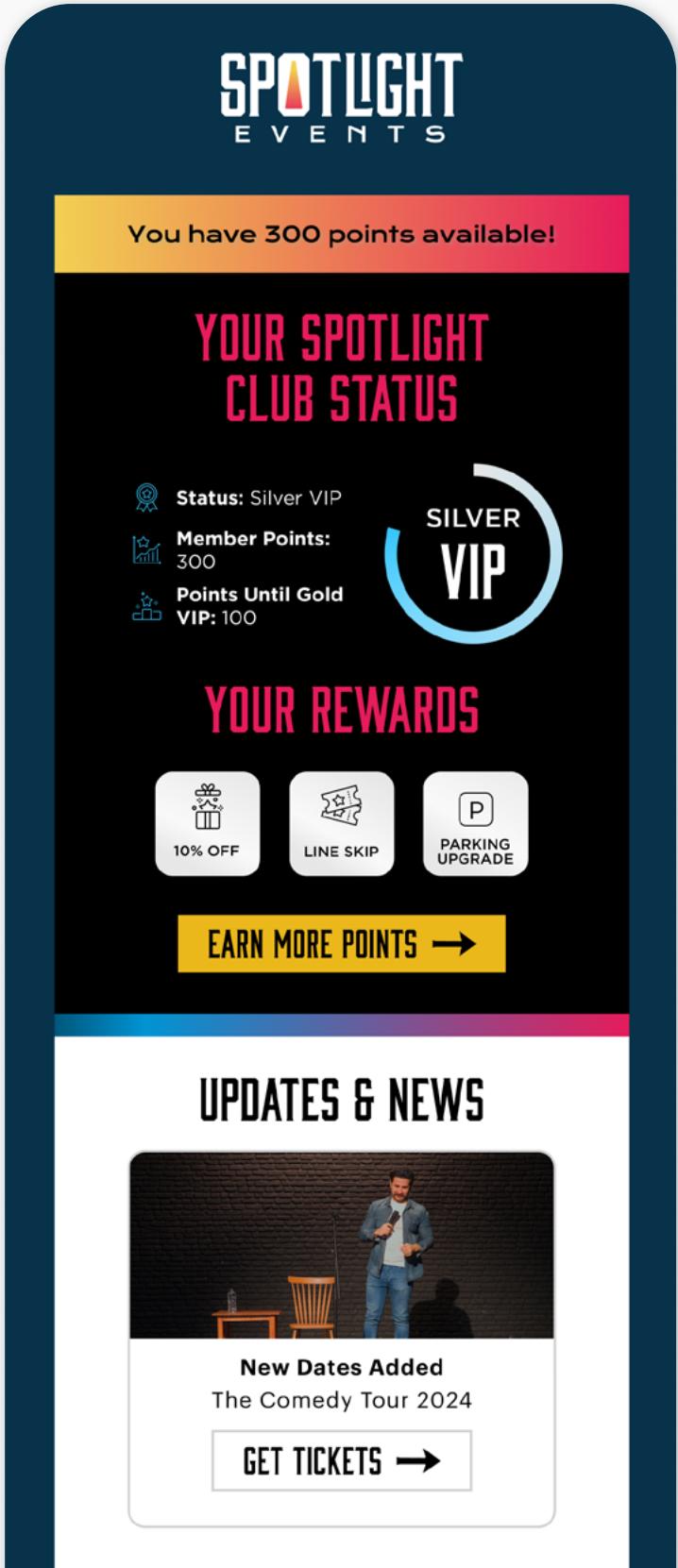
### Re-Engagement Series

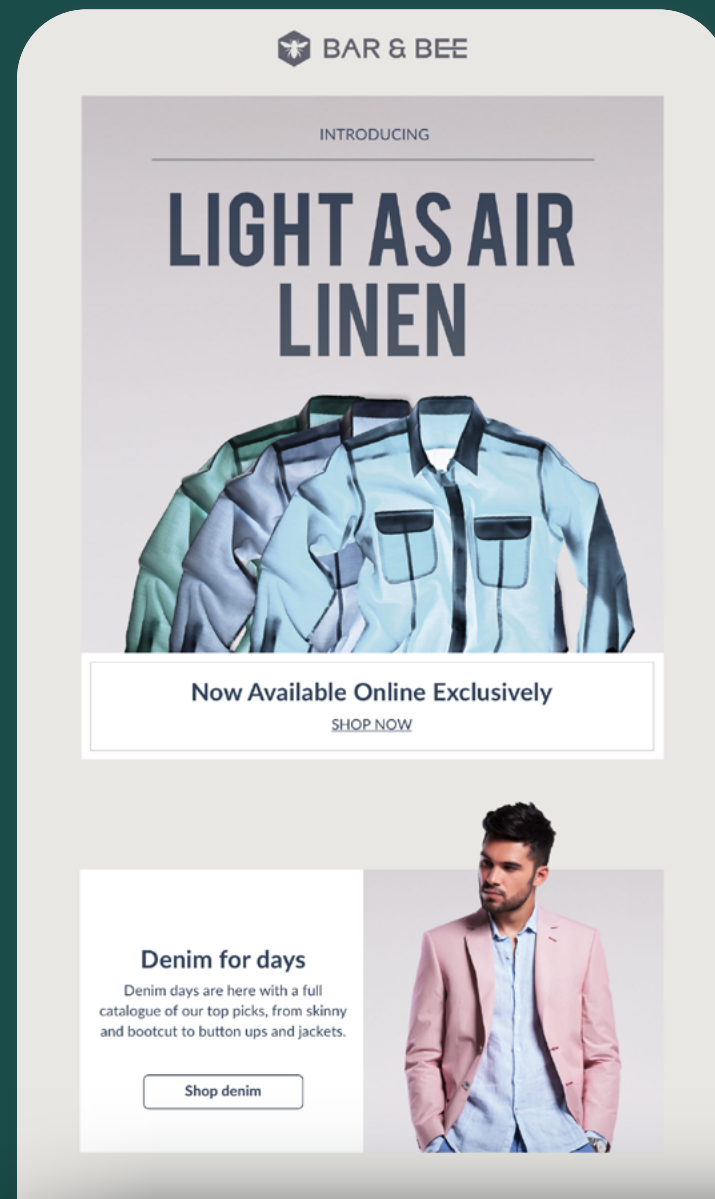
Targeted at inactive subscribers or customers who haven’t interacted with your brand for a while. These emails can offer special deals, updates on new products, or personalized content to re-capture their interest.



### Loyalty Program Updates

Emails that update customers on their loyalty points, progression toward new tiers, and exclusive offers. They encourage continued engagement and spending by highlighting the benefits of staying loyal to your brand.



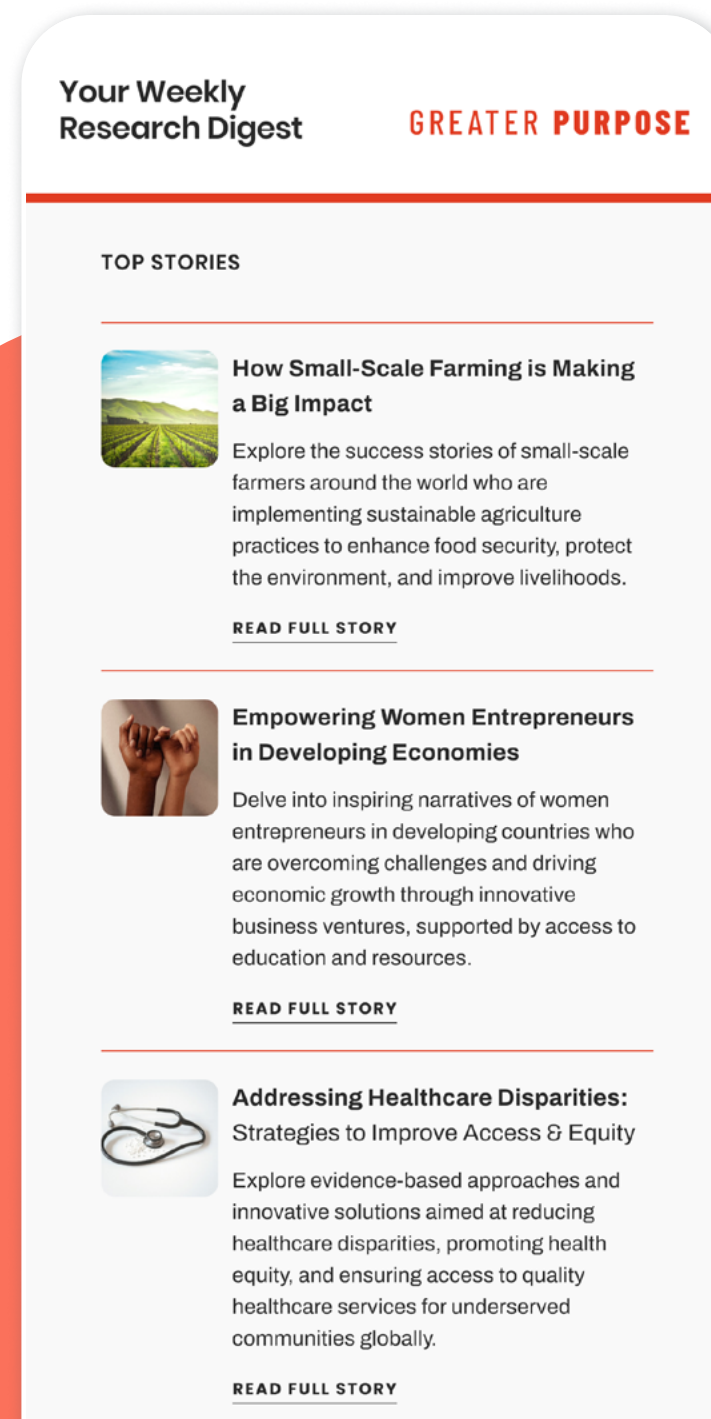


## Promotional Campaigns

Regular emails featuring sales, special offers, or new product launches. These are designed to drive immediate sales and keep customers informed about your latest offerings.

## Educational Content

Emails that provide value through informative and educational content related to your industry or products. This could include articles, how-to guides, industry news, and other relevant information to keep your audience engaged and informed.







## Birthday/Anniversary Emails

Personalized emails sent to celebrate a customer’s birthday or their anniversary with your brand. These often include special discounts or gifts as a token of appreciation.

## Seasonal or Event-Based

Emails tailored to specific holidays, seasons, or events. These are designed to capitalize on timely themes and drive engagement.



# Wrap Up

Automated customer journeys are a must-have for time and resource savings – and to effectively deliver personalization at scale.

Fortunately, you're in the right place. Whether you already have the ideas for customer journeys and just need a solution to action them, or you need strategic support from A-Z in your marketing campaigns, Marigold has the technology and teams to match.

*Let's talk!*





# Where *relationships* take root.

Marigold's approach to Relationship Marketing stands alone in a world of one-size-fits-all marketing technology companies. Our solutions are designed for your specific size, industry, and maturity, giving you the technology and expertise you need to grow the relationships that grow your business, from customer acquisition to engagement to loyalty. And, with a team of strategists that provide insights into what's working, what's not, and what's changing in your industry, you're able to maximize ROI every step of the way.

Great marketing isn't just about conversion, but true connection. Learn why 40,000 businesses around the world trust Marigold to be the firm foundation they need to help relationships take root.

Find out more at [MeetMarigold.com](https://meetmarigold.com)

