

Email Marketing Automation How-to Guide: Using Trigger Programs to Rally Response Rates, Generate Sales and Strengthen Your Brand

Marketers have less bandwidth and smaller budgets to work with these days. But that doesn't mean that management has lowered expectations for revenue from marketing campaigns. With fewer resources than ever, how do successful marketers find budget friendly ways to generate sales and reinforce brand messaging?

Automated email programs like trigger campaigns can be the solution. With little investment in time or money, companies can strengthen customer relationships and increase revenue through such programs.

In this guide, we will cover:

- The different types of automated email programs
- The benefits of trigger email campaigns
- How to start using trigger email for marketing
- Resources for setting up trigger email
- Plus, check out our Bonus Checklist: Idea Starters for Your Trigger Email Arsenal

Types of Automated Email Programs

While the term "trigger email" usually means a whole program, these campaigns are normally built with a combination of types of automated email messages. It's helpful to understand the different types of automated email and their role in your programs:

1. Trigger Email

A trigger email is defined as an automated email message that is sent in response to an event or "trigger". This trigger can be a customer action or response, an event like a date, a Website update or a response to Web analytics or Web visit data. Trig-

ger email can have static content or changeable content based on targeting or defined business rules. Trigger email messages are set up ahead of time and are not sent manually through a promotional campaign. They can be sent immediately, within minutes, days or weeks out or even as part of a "drip campaign" that sends an automated email series over a period of weeks or months.

2. Dynamic Content Email

A dynamic content email is one in which the content is varied based on customer behavior or customer data. These email messages take advantage of knowledge of a specific customer gathered through account preferences, response data, or Web analytics, and they are used to create highly individualized and targeted content. The use of dynamic content in trigger email has been proven to increase order size, response and revenue because these types of emails are more relevant to the recipient.

3. Transactional Email

Transactional email is sent automatically to confirm a certain activity. Examples include reminders for appointments or events, renewal notices, order or shipping confirmations or confirmations of a profile update. While it is important to keep these messages brief and informative, they are often used for brand reinforcement, promotional opportunities and trust recognition.

4. Welcome Email

Welcome email is the most common type of trigger email and ranks among the most important steps in the trigger email process. Studies show that recipients engaged through a Welcome Program have an open rate on subsequent email

that is more than 40 percent higher than those who haven't received welcome email. Plus, the use of welcome email can significantly increase customer satisfaction, decrease opt-out rates and increase order size.

Welcome email messages are sent immediately after someone subscribes, places an order or registers with your company. They establish the first impression of your company and your customers' expectations and set the cadence and tone of your campaign – all of which give your company an advantage in the long term. While it makes sense to think of a welcome email only as a first point of contact, welcome email can also be employed at any new milestone in a relationship, such as when a customer signs up for an additional subscription, registers a previously unregistered account or reactivates after a period of time.

Welcome email is ideal for automation because the messages and delivery are pre-determined, saving your company time, money and manpower.

Benefits of Trigger Email Campaigns

Imagine being able to time a marketing message to coincide with your customers' needs – without any effort on your part. Today's trigger-based marketing programs seize the moment by capturing just-in-time data and turning it into automated, executable campaigns while the window of opportunity with customers and prospects is wide open.

Companies that engage in trigger-based marketing programs are yielding as much as a 400 percent improvement in response rates over traditional [email campaigns](#). They are matching their knowledge of customer behavior with trigger-based technology that allows them to strike while the iron is hot, all without busting the marketing budget.

Once set up, trigger email programs work automatically and don't require day-to-day management. They aren't subject to delays when resources are tight or other priorities come up. And trigger email can complement broader communications like newsletters, special offers or acquisition programs.

Plus, unlike campaign email, trigger email is facilitated by customer behavior. Each message is sent in response to an event or customer-initiated action. So from the customers' perspective, the messages they receive are highly relevant. This targeting pays off in higher response rates and increased customer satisfaction.

Setting Up Trigger Email – Where Do You Start?

Today's most successful marketing campaigns use triggers to automatically send email based customer behavior. This is done by establishing a set of business rules and criteria. Marketers decide the right message, the right customer and the right time and use the combination for highly effective programs.

While trigger campaigns are conceived by marketers, the direction of the contact and content is best held in the hands of the consumer. This may sound scary at first, but it is actually quite simple and easy to execute.

The first step is to develop a trigger email plan that defines what will be sent, to whom and when. Consider these important factors:

1. Strategize what these communications can mean to your business and what kind of response you can expect to achieve. Don't look to trigger campaigns to reinvent your company – look at your company's strengths and capabilities to build a realistic program. Set the objectives of your program on a broad level with goals such as increased revenue, decreased attrition or increased response to campaigns.
2. Determine what data and data resources are available to build a program. What segmentation, testing tools and Web analytics are available to guide your company in determining offers, timing and audience? What information do you actually have about customers' preferences and behavior? Before you decide that a birthday greeting is the basis for an ideal program, make sure you have that pertinent information on most of your customers.
3. Inventory all customer communication to determine if

any current transactional or marketing email messages can be combined and put into a trigger email program. Then define and develop categories of possible trigger email content and classify by obvious or less obvious opportunities.

4. Think about your recipients first. Are the offers, timing and targeting right for your recipients? If you're brainstorming ideas for trigger email messages, consider conducting a survey of your existing subscriber base or start a Twitter or Facebook thread to get feedback from your audience on what kinds of trigger email they would find useful.

5. Define the triggers to be used. Is it customer reported data? How about behavioral triggers like opening a new account or a change in spending or purchase habits? Also, determine if you can use your Web analytics to set triggers. Having the ability to send "abandoned shopping cart" messages or use Web visit data to personalize content can mean the development of highly effective trigger campaigns.

6. Set frequency and recency rules and a contact cap. With a complex email follow-up path, you could be sending too many emails or sending emails too frequently to your subscribers. Before you start to execute, ensure that if a recipient follows a certain response path, the contact is reasonable. Is once a week often enough to contact them? What if your subscribers respond to three offers – will they get three follow-up email messages? Thinking this through at the development stage is one way to assure the success of your trigger program before it deploys.

7. Review response and ROI figures to optimize your trigger email program. Make sure you have a testing plan in place for each trigger and a plan to refine or eliminate any non-performers. Decide before the very first trigger email goes out how you will measure, what testing you should put in place and what your actions will be depending on the results.

8. Automate then validate. Although the idea behind trigger email is that the programs are "set and go", review the process regularly. Test the system to make sure it is still working. And revisit any trigger email programs if your marketing strategy, product offerings or other marketing factors change. It is very frustrating for the customer to get an outdated offer, or to

follow a "path" that leads to nowhere.

Resources for Trigger Email

If trigger campaigns required custom programming, no one would do them. Companies typically just don't have that level of expertise or available resources. Luckily, many email solutions provide the ability to set up these programs, and it's easy to get started. The challenge is finding a resource that will set up the level of sophistication you need while still maintaining compatibility with your systems.

Choose a robust email platform that enables you to set up trigger email and offers a high level of personalization to create individualized, relevant customer communication. Ideally this would include rich behavioral tracking across multiple channels such as subscriber preferences. It's also paramount to include historical behavior of customers and prospects such as frequency of purchase, items purchased, cart abandonment and visits to your Website.

Once you have a list of the trigger email that you would like to send, you should be able to implement it through a solution that offers the following capabilities:

- Reliable and flexible to address your company's needs
- Set up and send out event-based and dynamic email messages without the need for programmers
- Includes a built-in welcome function that instantaneously greets new subscribers as soon as they opt in with a personalized email that thanks them for joining and provides pertinent information about your email program
- Sends confirmations, reminders and follow-up email and can send out satisfaction surveys after purchases, alert customers that their memberships are about to expire or acknowledge receipt responses on Web forms
- Notifies sales reps when subscribers respond to an offer and lets other applicable staff know that individual customer needs assistance, prefers specific products or clicked the "request demo" link

- Customizes your transactional messages and adds offers and marketing messages to your purchase confirmations, invoices, shipping notifications and renewal reminders
- Acknowledges birthdays, anniversaries and other special dates and sends well-wishes and special offers to individual subscribers based on dates in their demographic profiles
- Allows your company to decide why it should send an automated email and lets you use more than one trigger to send it – for example, allows you to send email to subscribers who joined the list after January 1, 2009, and visited a Webinar confirmation page on your Website
- Lets your company decide when an automated email should fire, either sending the email as soon as a subscriber meets the criteria or at a set time afterward, such as sending a Webinar reminder message seven days after sign-up
- Connects to back-end systems with detailed customer data and sends the right message to the right subscriber in real time

Conclusion

A trigger email program gives you the power to send your customers the right message at the precise moment they are most likely to act on it. Trigger programs use information already available to you to increase rate of return without putting more pressure on already strained marketing resources or budgets. Taking the time to strategically plan and set up a trigger email program ultimately results in an automated process that doesn't require day-to-day management and adds much more value to your marketing mix.

About Lyris

Lyris, Inc. was the first online marketing solution provider with the vision to integrate email with diverse online marketing channels. Our depth of experience and technology

enables clients to benefit from the synergies between these channels, resulting in more efficient and effective marketing organizations.

Lyris HQ is the all-in-one online marketing solution that integrates email marketing with search, social, and mobile channels, enhanced by embedded Deliverability and Web analytics. This unique solution grows with the needs of online marketers and provides actionable insights to help make intelligent decisions and improve results. [Click here](#) to request a demonstration.

The Lyris Full Services solution allows you to outsource your email marketing and Web analytics to industry experts who can review your goals, assess your needs and fast-start you on your way to healthy return on investment. Contact Lyris [Customer Service & Support](#) to initiate a free, no-obligation discussion.

Bonus Checklist: Idea Starters for Your Trigger Email Arsenal

- Abandon Shopping Cart email** – These campaigns more than double the number of orders and the order size. Send an email announcing a special offer, free shipping or other sweetener to encourage someone to come back and complete their purchase. Refine these email messages by testing different offers and timing. While one may theorize that the sooner an email is sent, the better, many companies have found that timing the trigger email to go out as long as 24 or 48 hours later is actually more effective.
- Win-back programs** – Set up trigger email messages that include incentives for those who haven't purchased or visited your Website for a while. Start with those who haven't purchased in the last three months, six months and a year. Use their purchase history to determine the right offer and then use dynamic content to easily deploy email to a wide variety of audiences.
- Satisfaction survey email** – Send trigger email with a satisfaction survey after the first purchase and on a metered schedule after that. Consider offering a discount or prize for those who take the survey.
- Cross-sell email** – Use trigger email to cross sell from other products, particularly from lower performing products to best sellers. Set up a trigger email whenever someone either buys or looks at a product on your site that isn't one of your top 10. The email should promote a special offer on your strongest product – and hopefully convert a visitor into a customer and a larger sale.
- Add an email “punch card” for purchases** – Set up a program to keep track of the number purchases by unique customers. When a customer has purchased 10 times, give them a free gift or discount coupon. Use a trigger email series to let them know how many punches they have made and to promote special offers or products to encourage them to add another punch to their card.
- Customer service trigger email** – For those who have contacted customer service, trigger a follow-up email asking if their concern was addressed and providing contact information in case they are still having issues.
- Internal notifications** – While not a customer-facing application, don't be afraid to use the trigger email functionality to communicate with your sales or customer service teams. For instance, you can set up email alerts so a sales rep can follow up to make sure all is well if a customer reviews particular content on your Website or goes to a customer service page. Or, send email alerts to your PR team for follow up when reporters visit your press room.
- Seasonal trigger email** – If you sell sports-related products, set up triggers before championship matches to promote logo merchandise. For health care or beauty products, set up triggers to automatically remind customers to order more allergy medicine or sunscreen when cold and flu season rolls around again. Use holidays or seasons as triggers, segmented by purchase history to create trigger email messages for products and offers that are relevant to your subscribers.
- Service reminder triggers** – If your company provides a service – tire rotation, software upgrades, dental check-ups, furnace filter replacements, etc. – send reminders to come in or call to set the next appointment or to take advantage of special offers.
- Milestone email** – Offer your customers a discount or gift on their birthday, anniversary or other special day. If you market to businesses, send an offer on start-up anniversaries or on the first day a business started working with your company.
- Reactivation email** – If customers have not purchased or clicked through an email in more than six months, their likelihood of purchasing in the future is low. A reactivation email can promote new targeted offers or a general discounts to get that customer to purchase from you again.

- **Drip email programs** – These are regularly-scheduled email messages that go out with offers or include additional content along with offers, recipes or tips. Again, use subscriber preferences of historical behavior to determine the right offers and tips for your audience.

- **Email alerts** – Encourage your customers to modify their profiles to set up alerts when new products are in stock, when their favorites go on sale or to receive alerts when new content is uploaded to your Website. These are great because they are truly customer-initiated.