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The Growth Marketing Conference

Hands Off The Wheel:
Automating Your Customer Experience

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Lifecycle Marketing Manager, Opendoor

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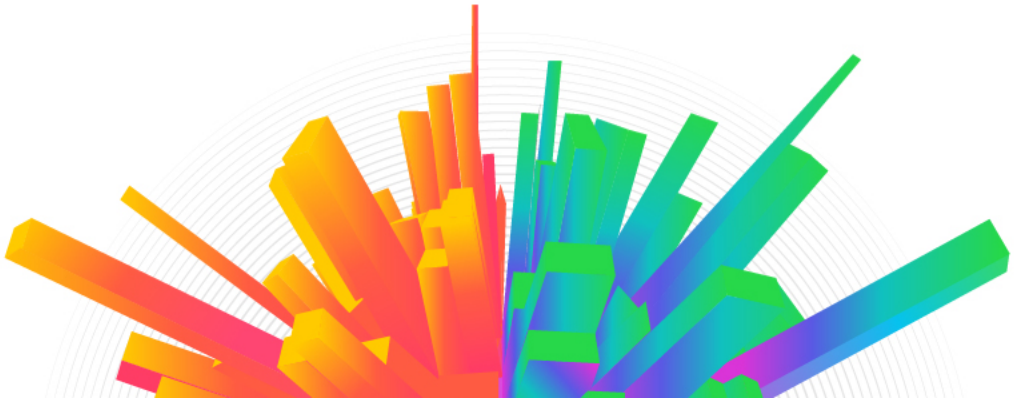
Opendoor

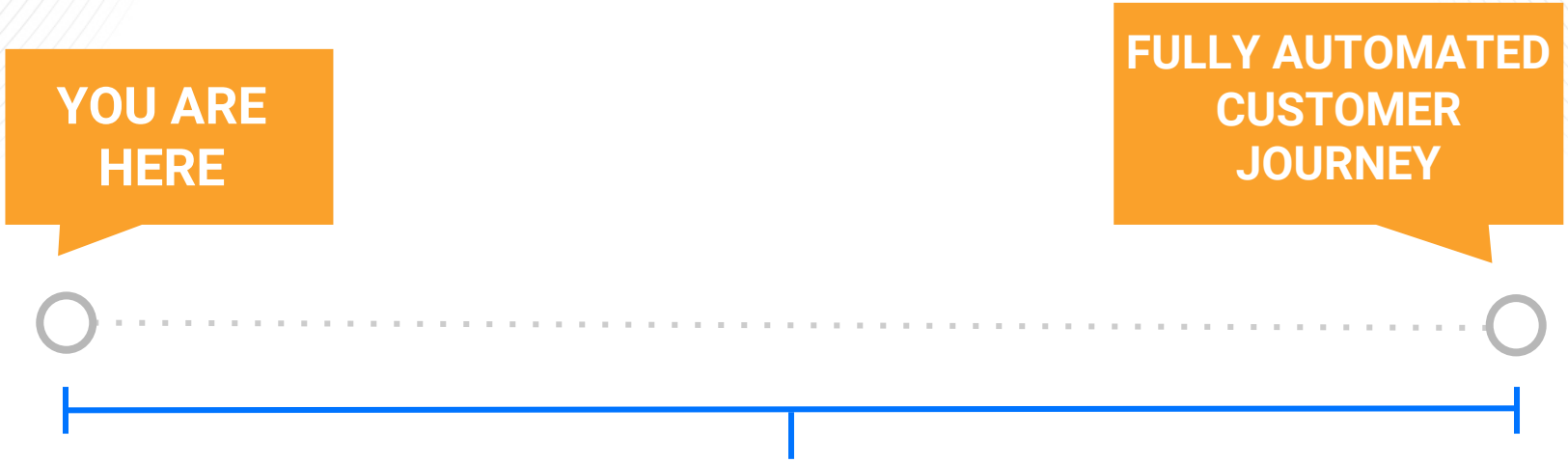
Presented by: iterable

Automate your customer journey to benefit...

1. Your customers
2. Your company
3. You

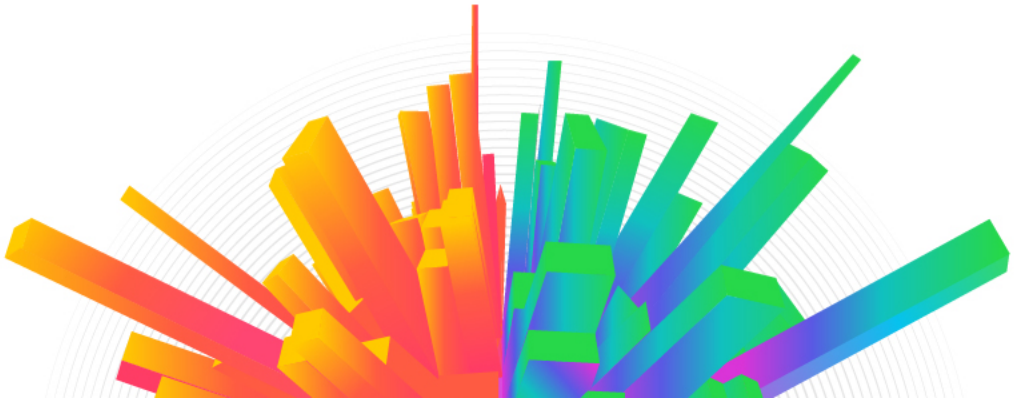


Here To There



Mindsets

1. Holistic
2. Multi-channel
3. Rooted in respect



Holistic

Think about the entire customer journey

Multi-Channel

Go beyond email

Rooted in respect

Choose what’s best for the customer

Mindsets

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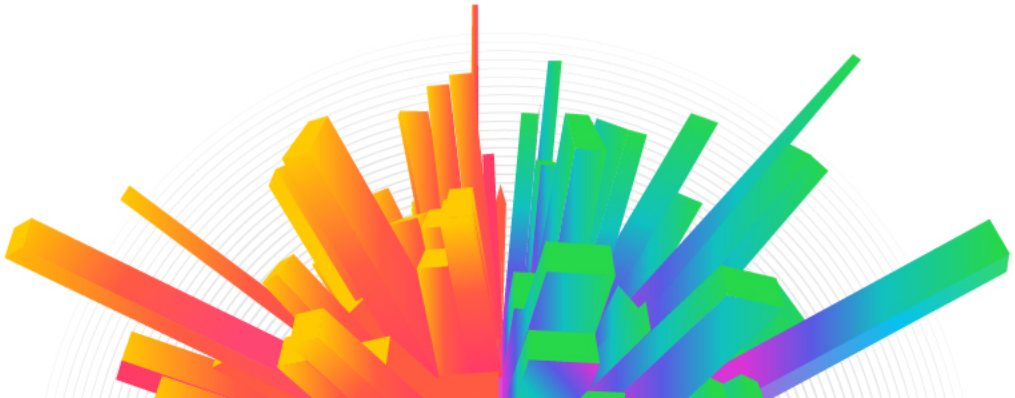
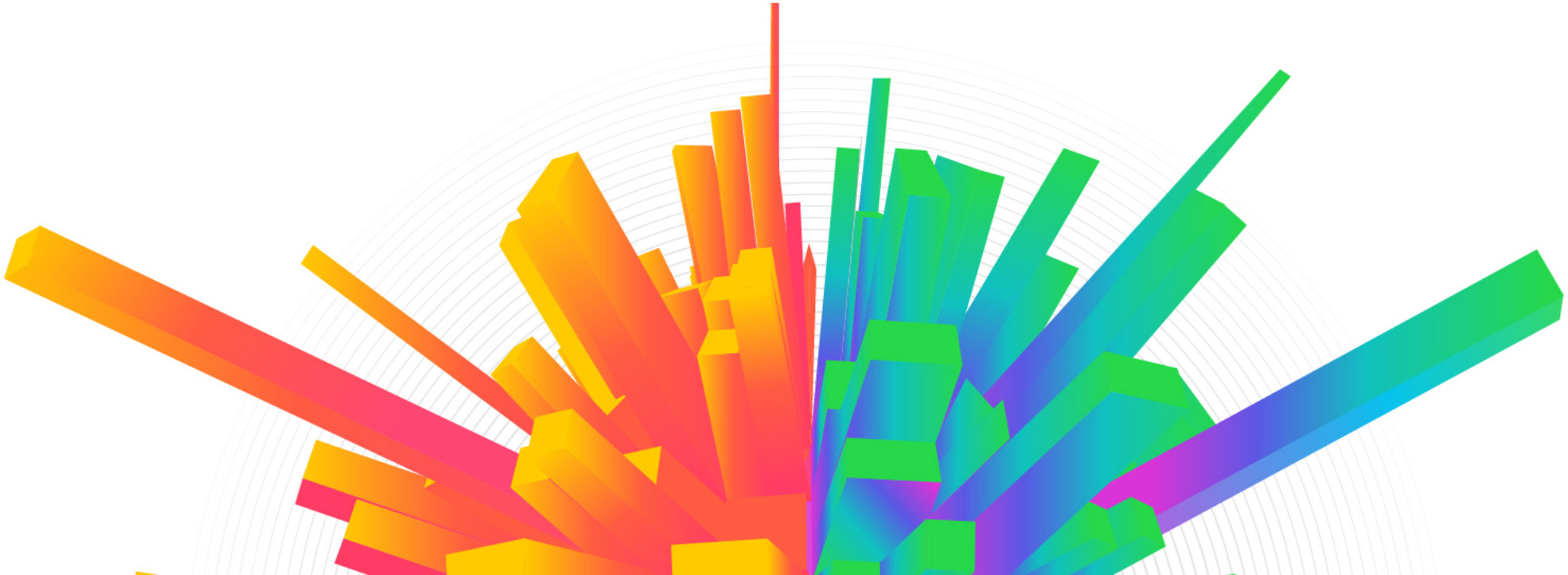


The process summed up

Your customers are on a journey. Your job as a lifecycle marketer is to understand that journey, create a remarkable experience across multiple channels, and automate it.

Step 1

Define the key events in the customer journey



Introducing

The Customer Journey Framework

Stranger

"I have no idea who you are"

Lead

"I'm interested in buying. Maybe now, but probably later"

Customer

"I bought"

Repeat customer

"I'm happy, I'll buy again"

Promoter

"I love this company. I'm gonna tell my friends about it"

Define Customer Journey Events

Stranger

Gives you their email.

Lead

Buys your product or service.

Customer

Buys again. Upgrades. Renews.

Repeat customer

Refers their friends.

Promoter

More Detailed Customer Journey Events

Stranger → **Lead** → **Customer** → **Repeat customer** → **Promoter**

Strangers become leads via organic and paid channels. They opt-in, download content, or attend an event.

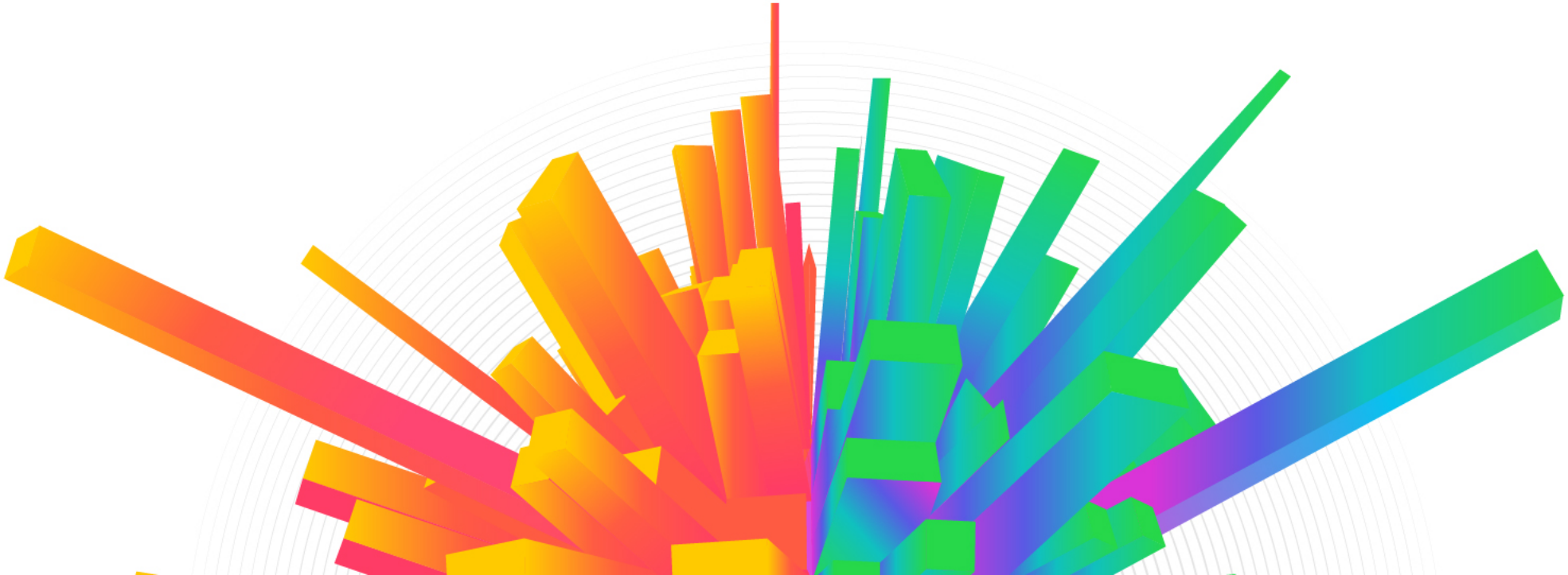
Leads become customers by making their first purchase, or buying a subscription.

Customers become repeat customers by making a second purchase or keeping their subscription.

Repeat customers become promoters by referring their friends or writing a five-star review.

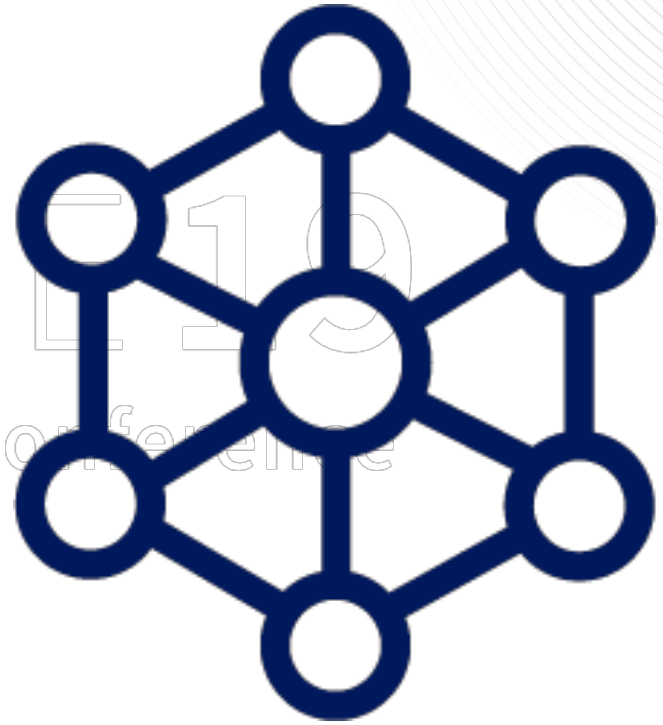
Step 2

Choose the relevant channels for each event



Channels to consider

- Email
- Push notifications
- Text messages
- Phone calls
- In-person interactions
- Direct mail
- Gifts
- Chat
- Retargeting
- Social



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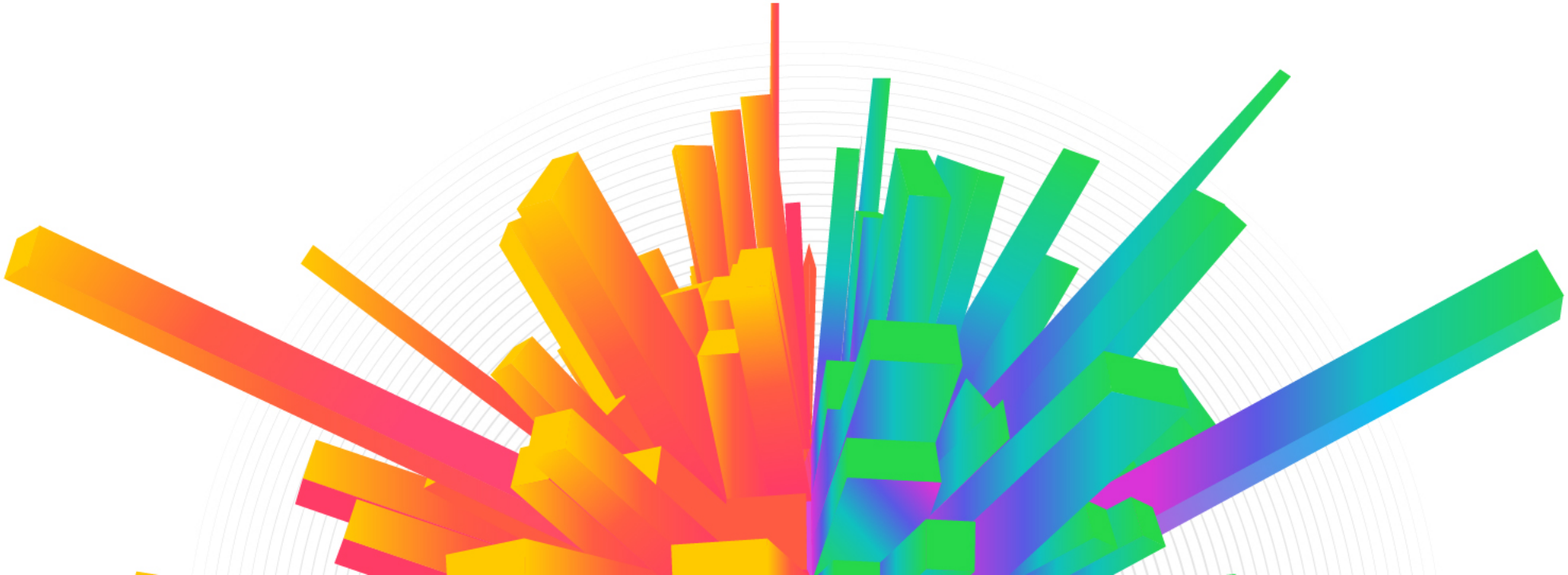
	In-person	Email	Push	Text	Phone	Mail	Gift	Chat
Downloads lookbook		X						
Browses product page		X	X					X
Visits in-person store	X							
Downloads the app, signs up with their email		X						
Downloads the app, doesn't give email			X					
Calls customer support					X			
Joins rewards program		X		X				
Abandons cart		X	X			X		
Makes their first purchase		X						
Completes third purchase		X						
Finishes tenth purchase							X	

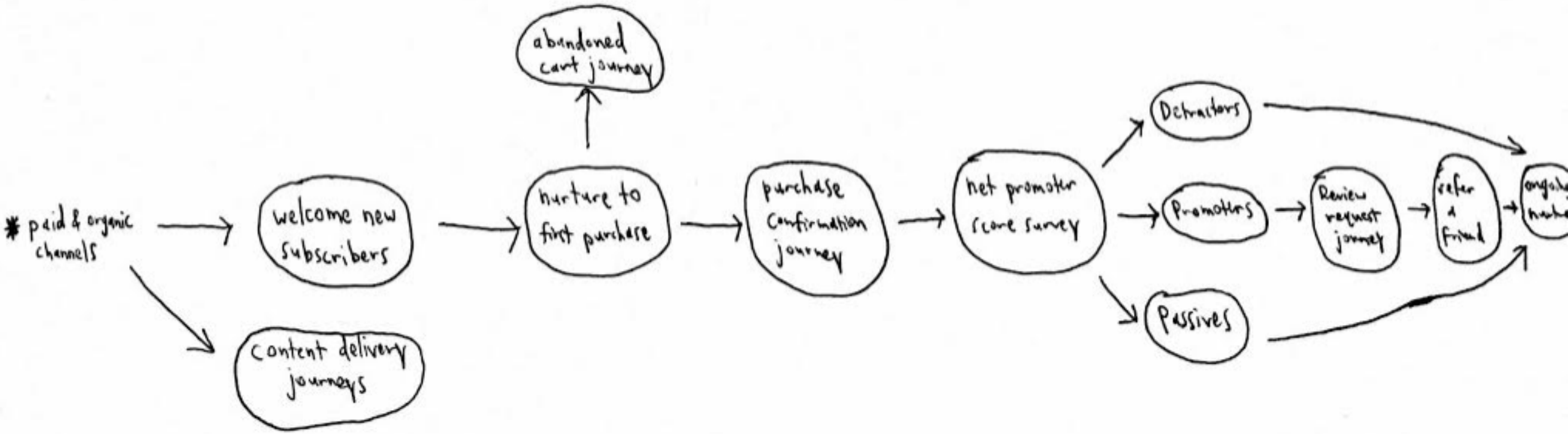
Think multi-channel

Step 3

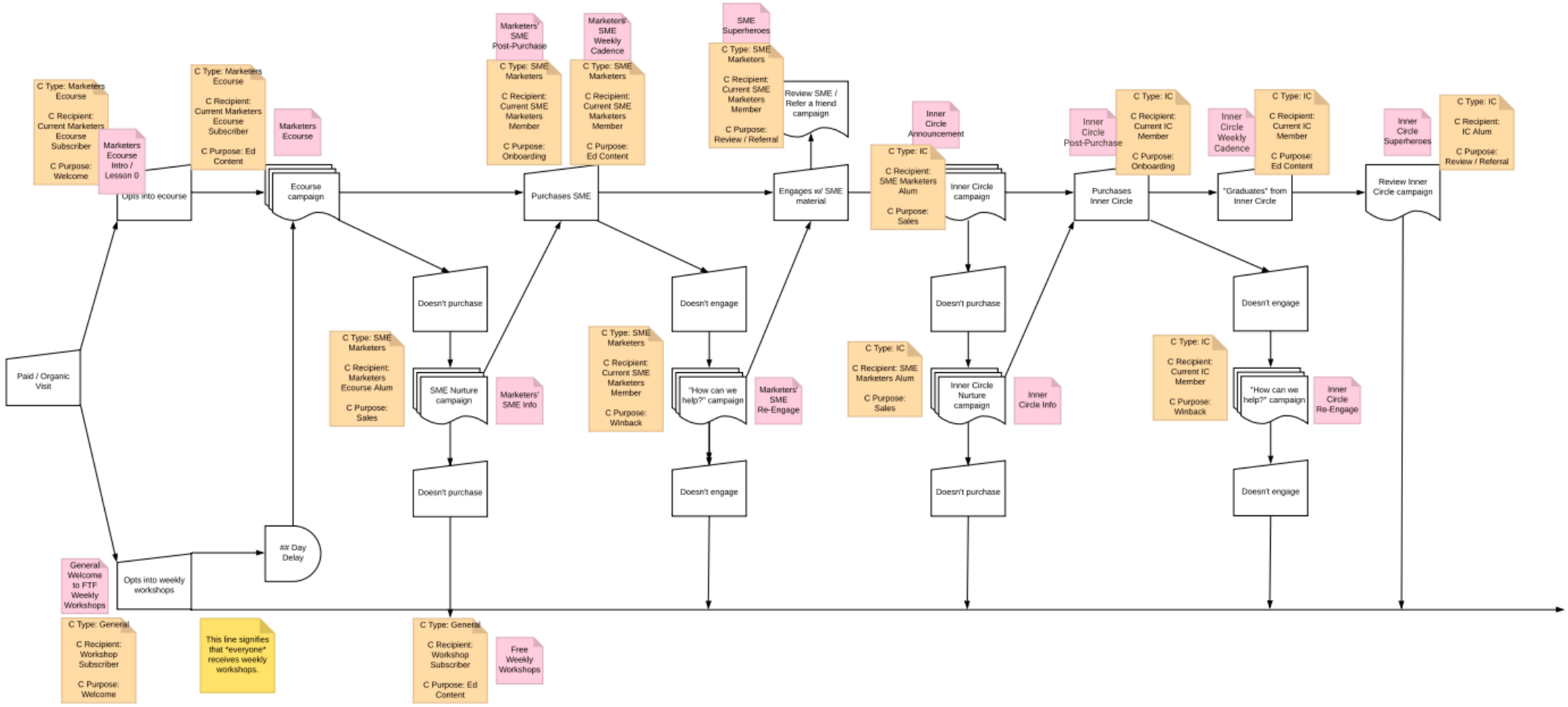
Create an automation blueprint showing the whole experience



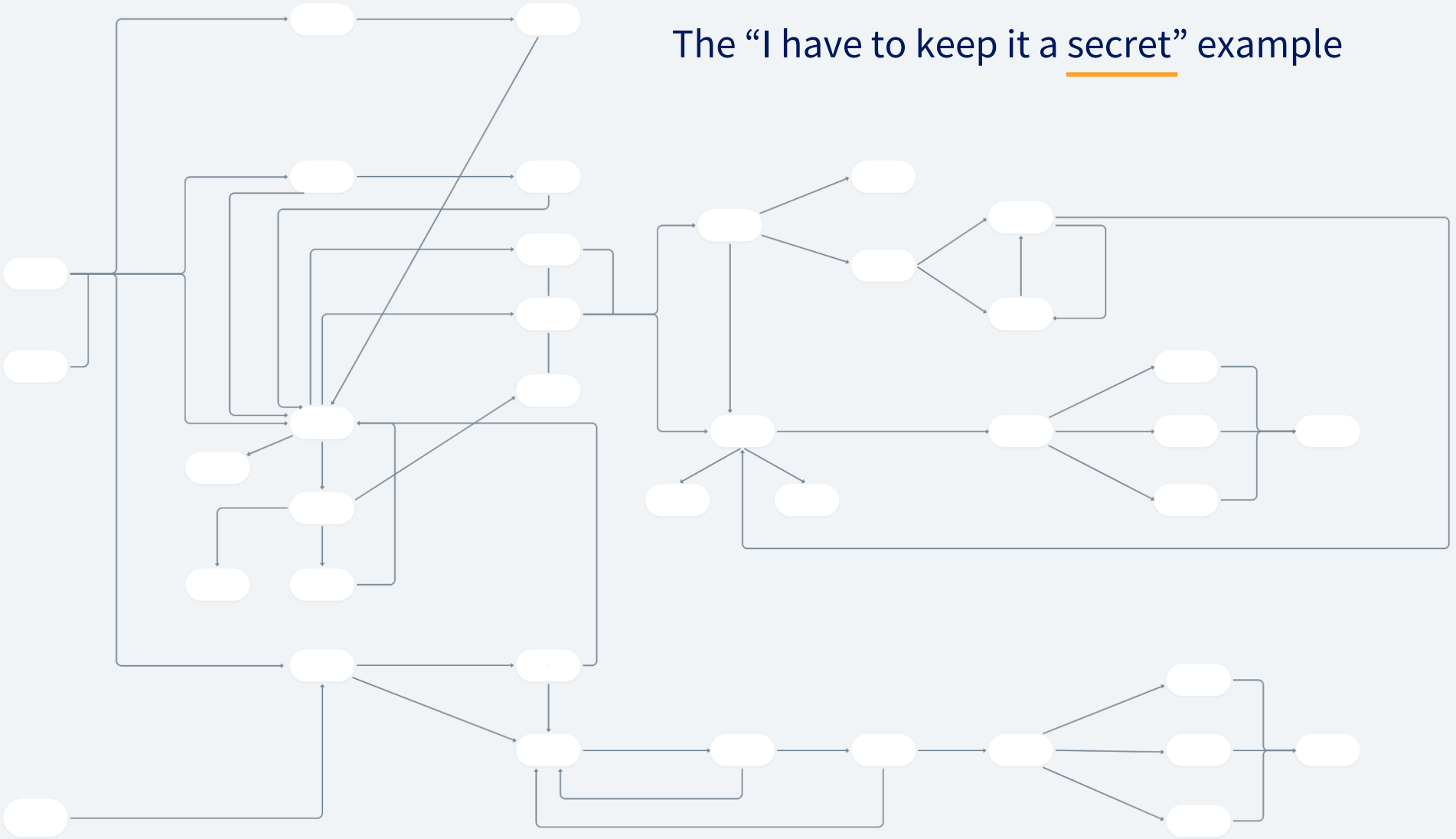
Back of the napkin example



Fleshed Out Example



The “I have to keep it a secret” example



The 7 automations every business needs

1. Follow up with new leads
2. Nurture leads into customers
3. Onboard new customers
4. Turn first-time buyers into repeat buyers
5. Woo repeat buyers into promoters
6. Reengage stale leads
7. Win back lost customers

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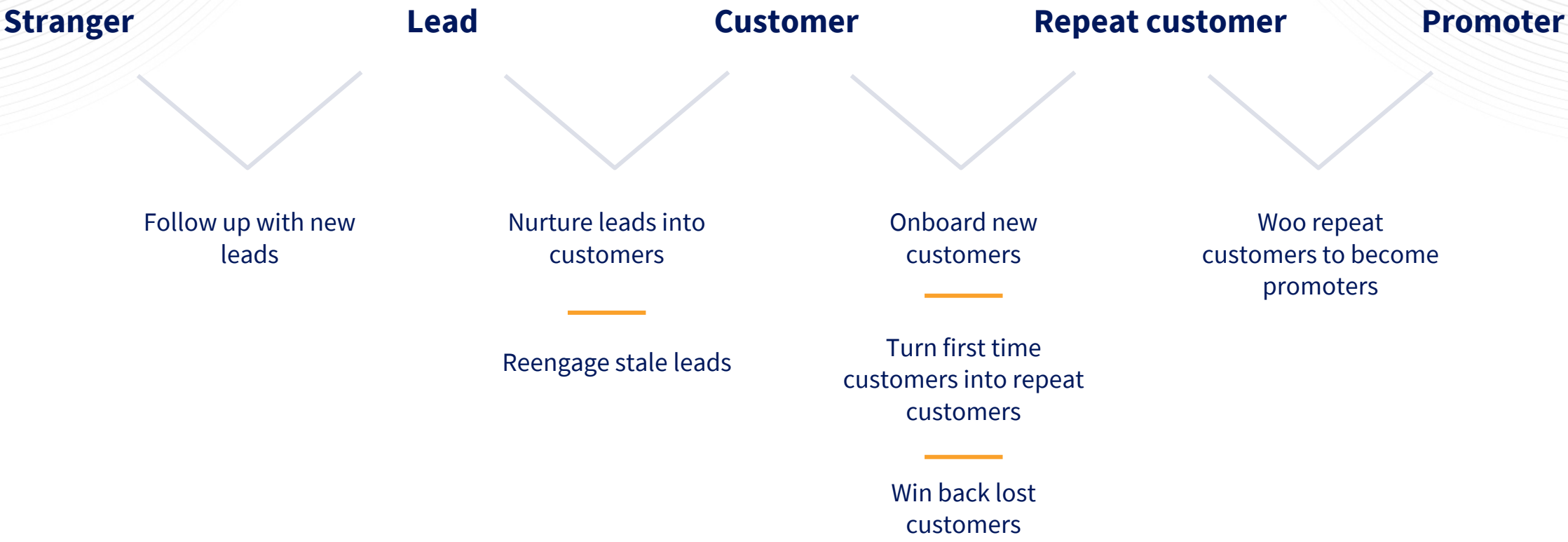
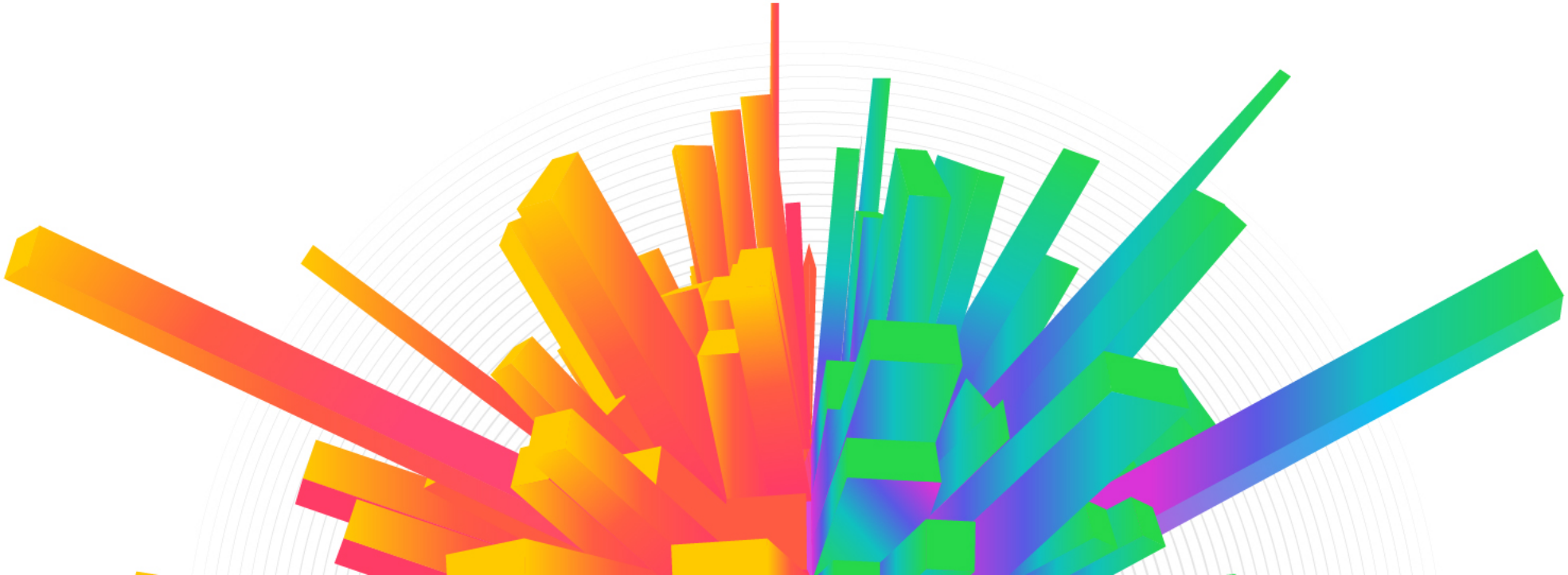
The 7 Automations Map To The Customer Journey

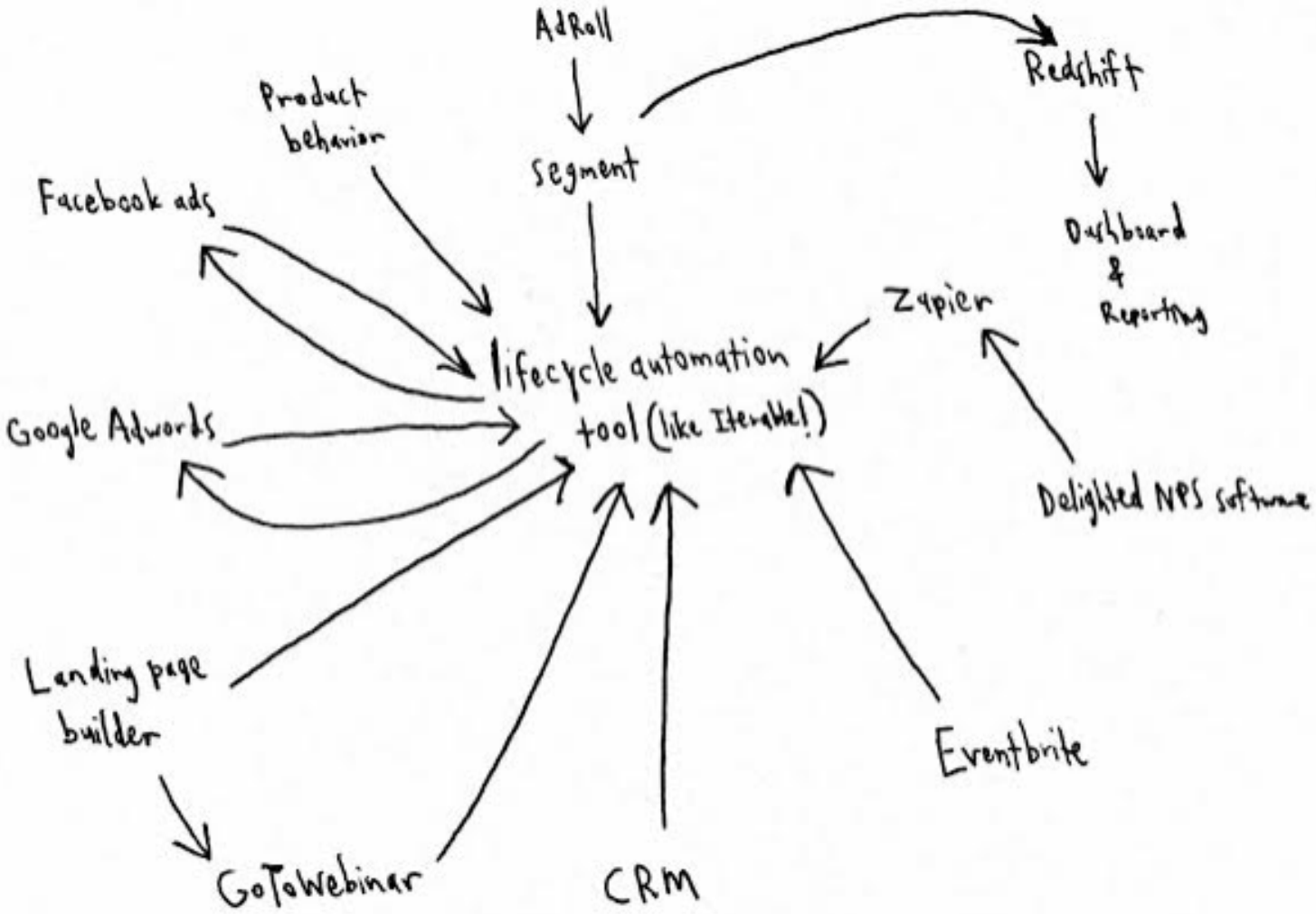


Step 4

Stitch together your marketing tool stack

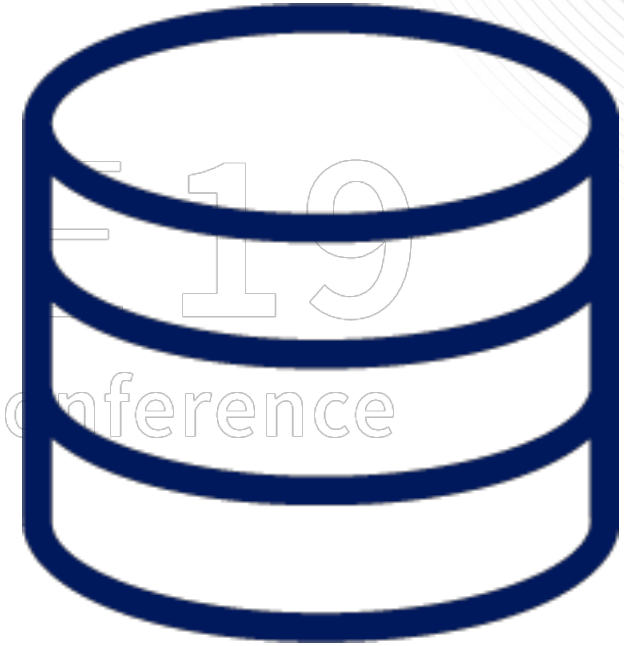


Tool stack example



Types of data living in your tool stack

- Demographic
- Engagement
- CRM



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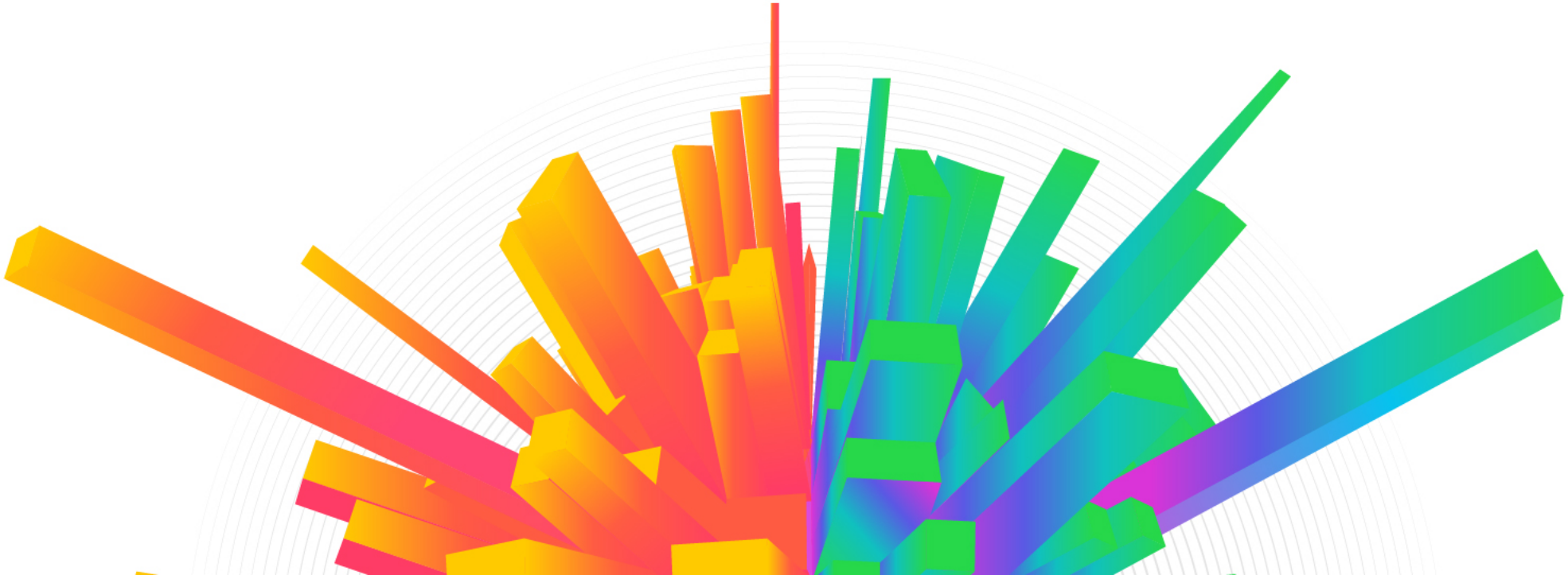
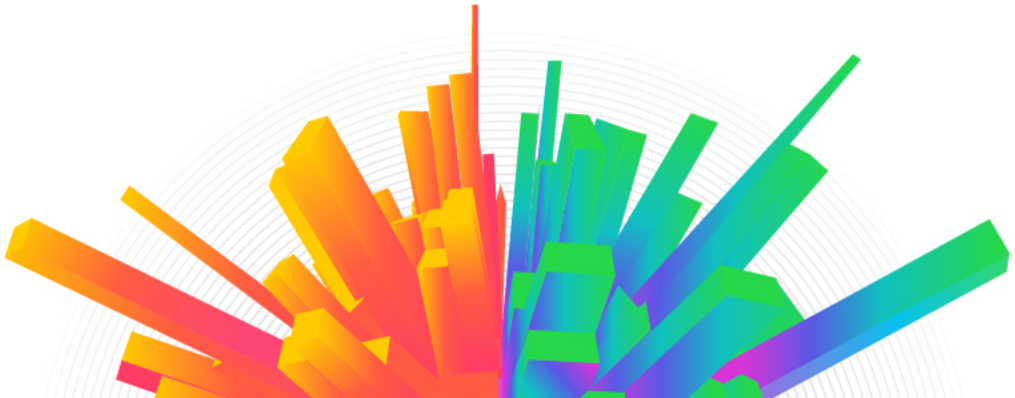
Step 5

Prioritize the blueprint based on company goals



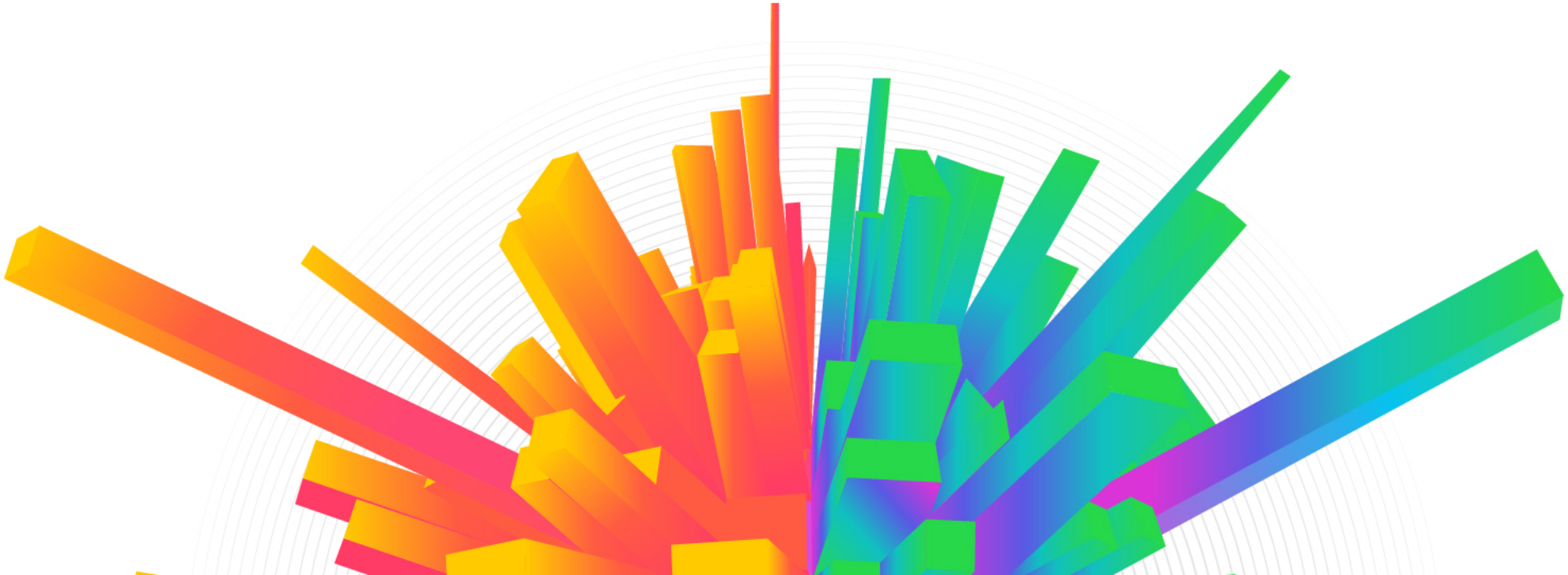
Buckets

1. New
2. Refresh
3. Experiments



Step 6

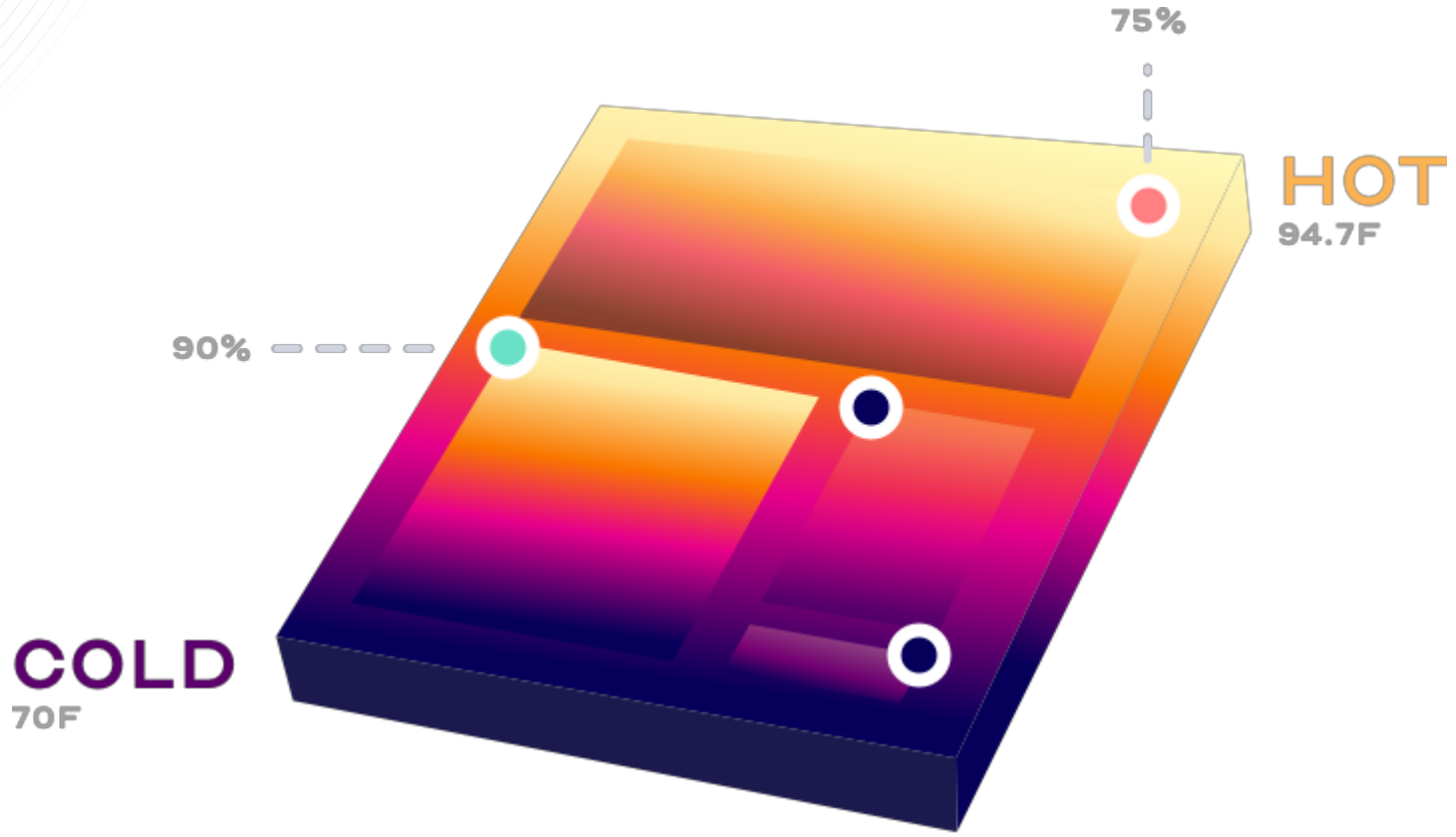
Build each automation one-by-one, then rinse & repeat



Rule of thumb

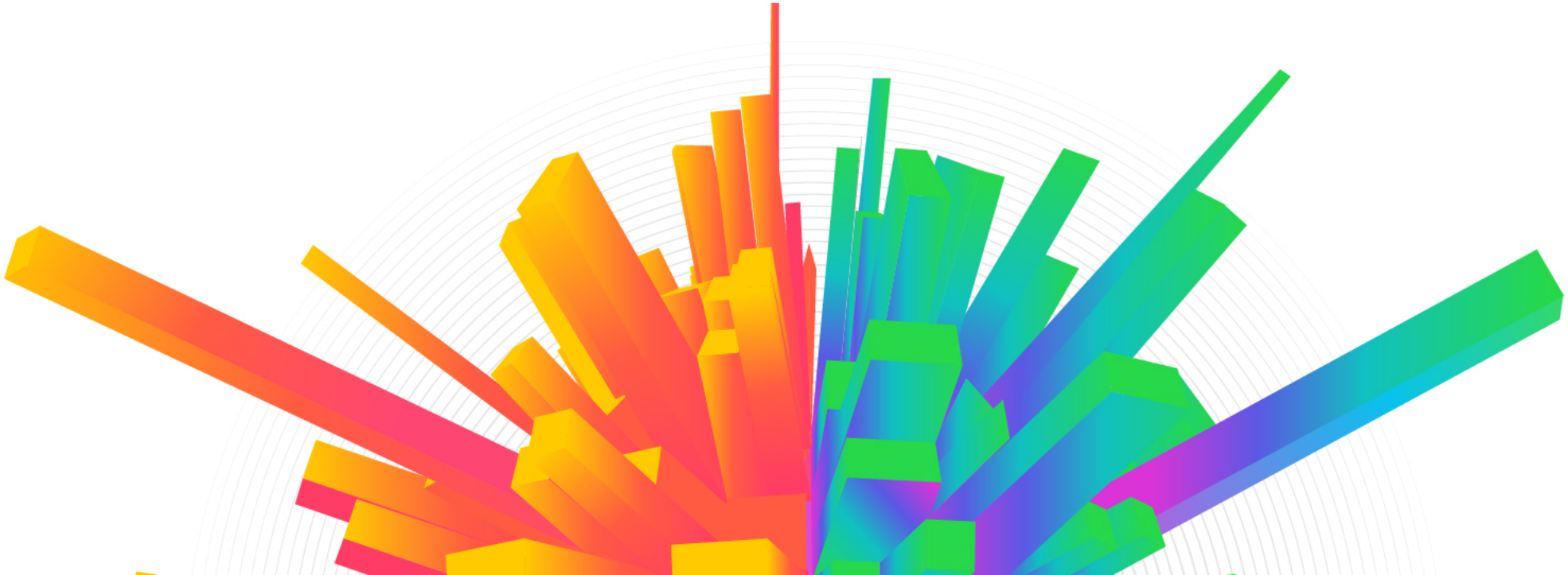
Make the best possible automation you can at this moment in time

Use heatmaps to make content decisions



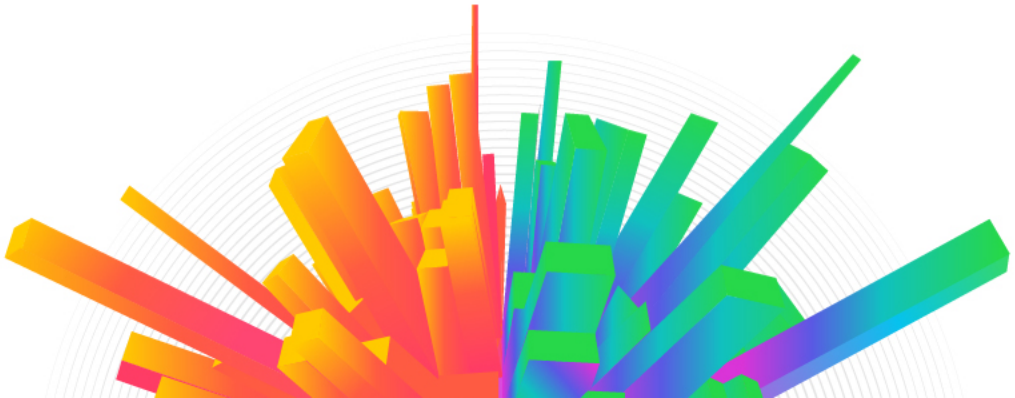
Step 7

Launch, learn, and test



Analytics layers

1. Program
2. Automation
3. Message



The 7 Steps To Automate Your Customer Experience

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5. Prioritize the blueprint based on company goals
6. Build each automation one-by-one, then rinse & repeat
7. Launch, learn, and test

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Thanks!

Hit me up anytime with questions, I'm happy to help.
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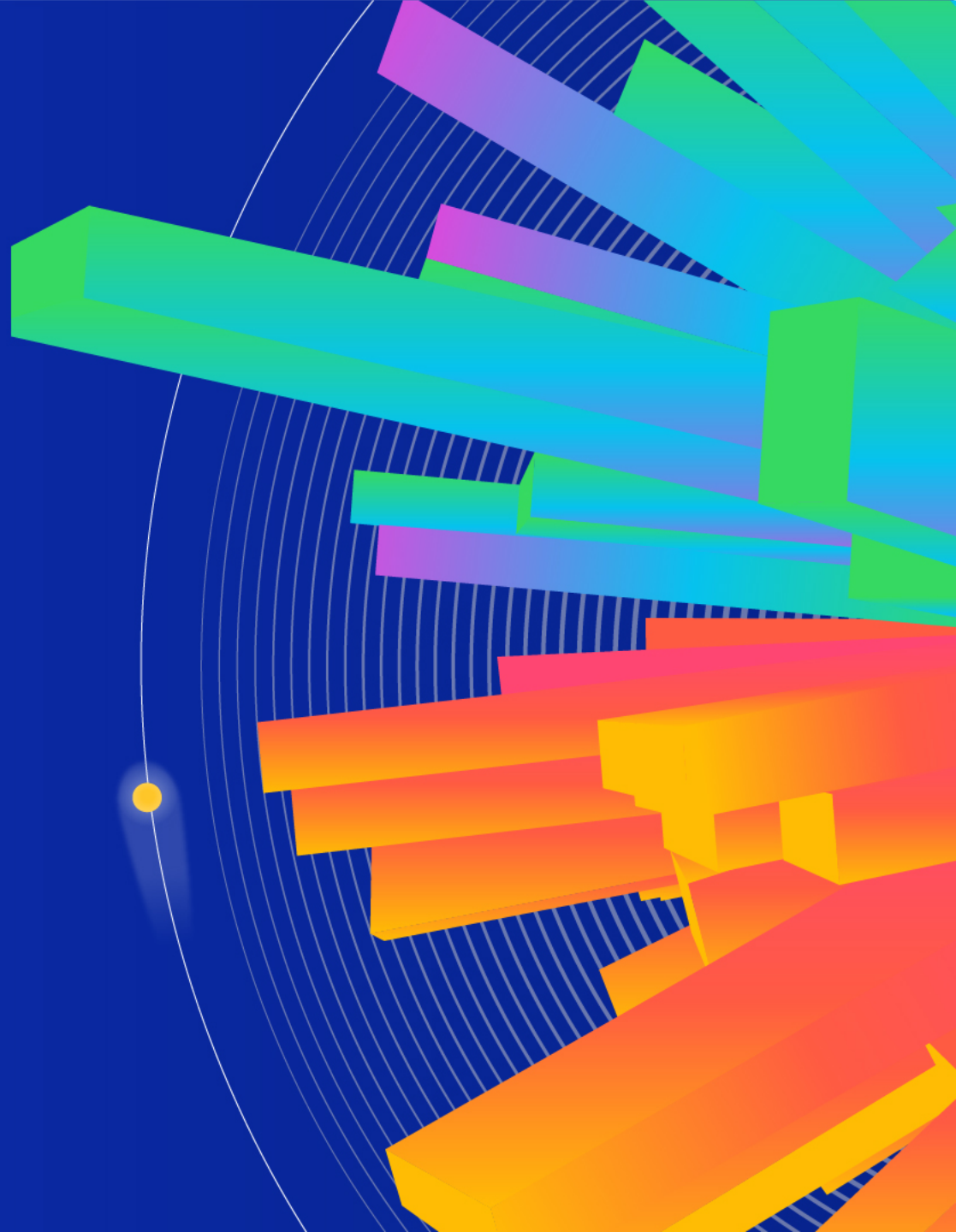

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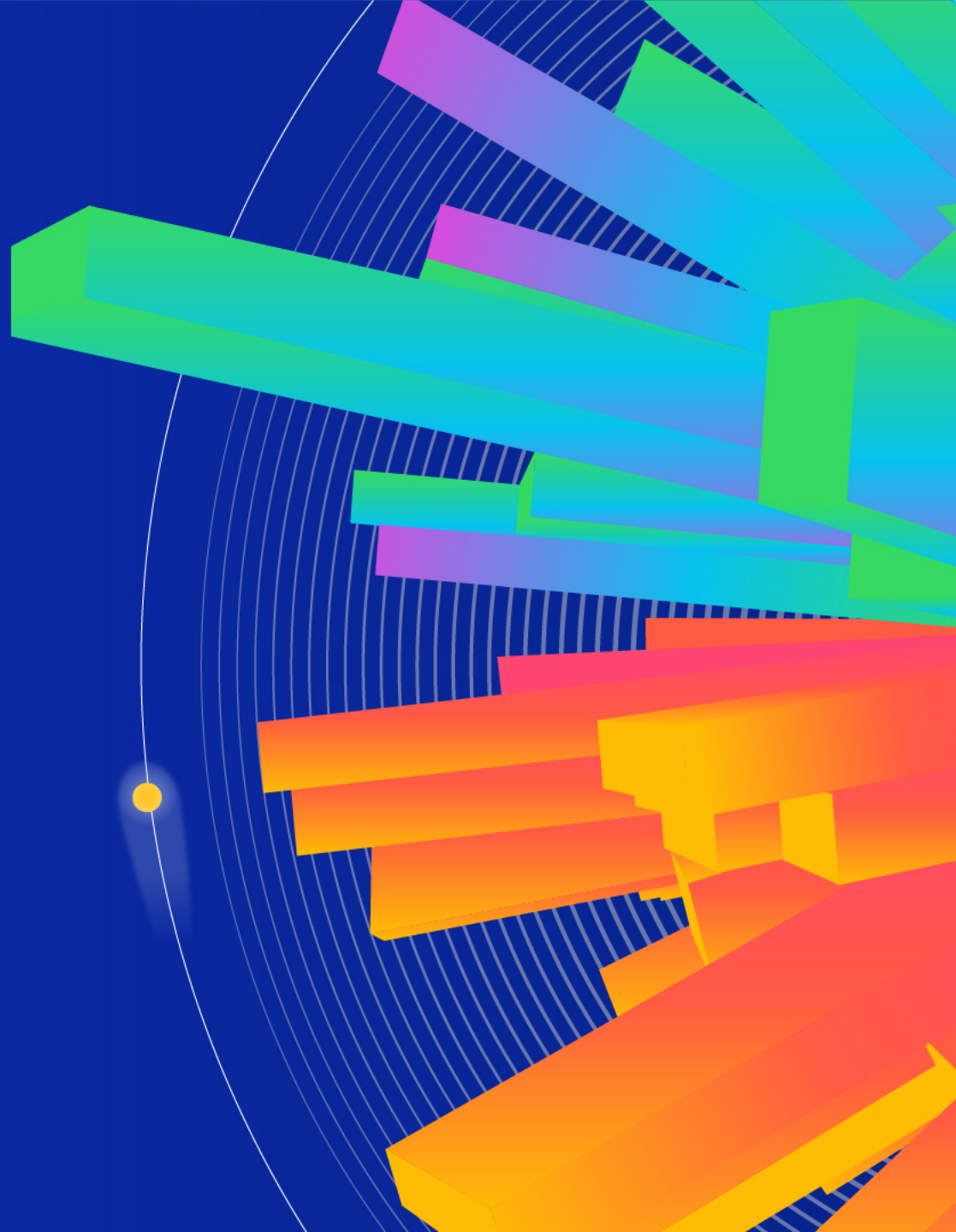
Q&A



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