



The anatomy of a successful customer engagement journey

A bulletproof guide to engaging your customers

Did you know on average 80% of customers don't return to a business, even if they have joined a database?

Whether your business has a customer database or a full-blown loyalty program, the key is to define your customer engagement strategy and execute it well for every customer.

This guide is designed to help you plan for the different stages and ensure that you can engage your customers across their life cycle with your business.

There are four parts to a successful customer journey:

- ✓ **Welcome and onboard**
- ✓ **Surprise and delight**
- ✓ **Engage**
- ✓ **Retain**

Each of these stages is relevant to the individual behaviour of customers. The timing in which you react to those behaviours can be the difference between an engaged, inactive or even confused customer.

WELCOME AND ONBOARD

There are two key objectives:

1. Ensure the customer understands the value of why they have joined your database or loyalty program
2. Get them back quickly.

Send a single message or a series of messages introducing them to member benefits, different facets of your business and even getting initial feedback on a purchase or visit.

Securing a second visit is essential to weave your business into the new customers' habits, transforming them from one-timer into a regular. Whether you are a gym, retailer, restaurant or cafe, you want to capitalise on the fact that your customer has given you their details by showing them value and care as soon as possible.

Common tactics to get that second visit include bounceback offers with a short redemption period, running a refer-a-friend campaign or even a gift with their next purchase. Consider testing to understand what offer delivers the best response.



SURPRISE AND DELIGHT

Now you have gotten your new customer into the habit of shopping with you, it's time to consider your 'surprise and delight' tactics.

These are the added benefits of membership and are all about acknowledging the relationship between you and your customer. Whether it's an automated 'every ten visits gets a free coffee', or a random prize draw rewarding members every month. This is the phase of your relationship that can consolidate your customer's behaviour.

Reward consistency

Look after your regulars, they are the customers you can depend on during good and bad times. They have invested in your business both financially, with regular visits, and mentally, through keeping you top of mind. Be wary of being tokenistic in the reward, perception of value is key here rather than necessarily a dollar value because this customer is being rewarded for their continued loyalty.

Acknowledge tenure

Sports clubs have utilised this forever as a tactic to build long-term commitment and often make the length of membership a tangible reward with special badges, membership cards and, of course, member benefits.

Think that's not relevant for your business? Think again. If you have a customer that has been on your database, and ideally shopping or visiting regularly, it's a special relationship and deserves acknowledgement. Think about how that's relevant in your business and ensure that you have a communications plan around it. Even if you just have an acknowledgement each year on the anniversary of sign-up to say thanks, this can help you stay connected to your customer. This is especially valuable where a high-value customer may only visit once or twice a year.

One of the reasons that a different member card can assist here is so that staff can immediately identify a VIP customer and perhaps add a little extra service or value to the visit.

The key to 'surprise and delight' is rewarding customers for their consistency and value, so other creative ways to reward might be priority access to sales for retailers, tasting events to test new menu items for restaurants, or even bonus free items with a purchase.



The key to 'surprise and delight' is rewarding customers for their consistency and value...

ENGAGE

Constant communication and engagement is critical throughout the relationship with your customer.

Remember to always be relevant to what your customer is interested in, not just what product or service you need to move. Consider what phase of the journey the customer is in and, if you have the ability, it's worth communicating to separate segments differently. If you know who your best customers are, then speaking to them in a different voice that acknowledges their value is another way to add to the relationship.

When considering your engagement plans, remember that customer behaviour changes. In some categories, such as retail, there are several reasons a customer might interact with your brand. For example, if you are a liquor retailer and your customer is a regular purchaser of domestic beer but on occasion they buy craft beer, or even switch to wine. This is likely a function of shopping for a different occasion. The same can happen in your restaurant. Customers might be regular takeaway coffee customers but now and again they book a table for a large group to celebrate with friends.

This is important to consider when designing your engagement journey, so you don't keep serving up the same content or specials to customers. You never know when you might be able to increase your share of their wallet.

Plan your engagement communications around key events, seasons or occasions but leave yourself room to be spontaneous and respond to market conditions and new opportunities. If your business is affected by weather, have your communications ready to be triggered to take advantage, for example, a hot summer day to sell more ice cream.



RETAIN

No matter how great your business is, customers are busy and some will potentially disengage, altering their purchase or visitation behaviour.

Some of the reasons for this may not be in your control, but planning for this inevitability will help reduce the impact.

Knowing when a customer is disengaged and in the 'retain phase' is critical, and very difficult to do without having systems in place that automatically monitor behaviour. Investigate how your communications or CRM partners can assist you in knowing and acting when customer behaviour changes and then plan your communications accordingly. Consider how much you would invest to get a good customer back and use that as your incentive to get them back on track. It's also important to find the balance between trying to reconnect and pestering your customers so they unsubscribe.

Some other things to consider in a successful customer engagement plan include:



Acknowledging your customers birthday



Celebrating the birthday or opening day of your business in a way that benefits your customers



Setting-up regular communications to remind customers of other services that might be relevant to them; think functions in hospitality, or personal training at a gym.

The key to a successful customer engagement strategy is **planning, data** and **relevance**.

Planning what you need to communicate to customers at different stages of your relationship is critical, tailor it to their profile and behaviour. To do this you will need data that is constantly updated based on the actual visits or spend of your members and customers.

Get in touch today to learn how we can help you engage with your customers and drive business.

Email hello@impactdata.com.au or visit our website www.impactdata.com.au



For further enquiries, get in touch:

[**hello@impactdata.com.au**](mailto:hello@impactdata.com.au)

Login to Talkbox

Login to HeadOffice



AUS

Level 1, 428 Little Bourke Street,
Melbourne 3000

Phone: **03 9827 7790**

Email: [**hello@impactdata.com.au**](mailto:hello@impactdata.com.au)

[**www.impactdata.com.au**](http://www.impactdata.com.au)

UK

Regus Blythe Valley Park,
Central Boulevard, Solihull B90 8AG

Phone: **0121 647 7113**

Email: [**hello@impactdata.co.uk**](mailto:hello@impactdata.co.uk)

[**www.impactdata.co.uk**](http://www.impactdata.co.uk)