

THE DATES THAT MATTER

Automated Messages 'Dates that Matter'



TalkBox
by Impact Data

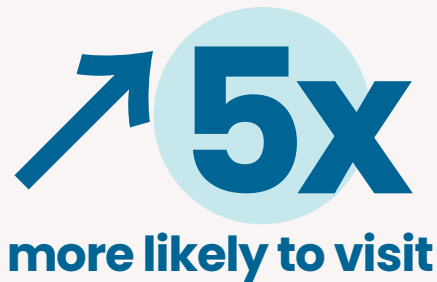
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TalkBox Automated Messages That Matter Automated Data-Driven Series



when customers receive behavioural-triggered messages sent by TalkBox

Hands-free communications that deliver

TalkBox by Impact Data partners with thousands of clients across the world to help deliver more visits, more often. By using the data that's already in their platforms like membership, loyalty, reservation and point of sale, we trigger communications that drive customers back to the business.

We have spent years refining 'The Messages That Matter' series to help our clients **turn first-time customers into loyal regulars**. The communications are broken into 2 different series: **the Basic** and the Automated Data Driven, which depend on the type of data that you connect to TalkBox. This Automated Series is about using the behavioural data we capture from your systems like **POS, loyalty, booking**, etc. to understand where a customer is on their journey with your business and send the right message, at the right time, with the right call to action to get the next visit.

When it comes to getting the most value from your TalkBox account, Automated Messages have to be front and centre. When customers receive behaviour-triggered messages sent by TalkBox, they are 5x more likely to visit.

THE DATES THAT MATTER

When your TalkBox account is connected to one or more of our **Data Partners**, your account will be set up with the automated messages that align to your data, and each day your TalkBox account will be updated to ensure it's always marketing ready and provides a single view of your customer.

Read on to learn the automated, data-driven messages that matter to help you drive more visits, more often.

What we are covering

We start with the 'Dates that Matter' to drive your messages. Then we break the messages into two categories: date-triggered and loyalty/membership communications.



Guide to *The Dates That Matter*



Understanding the key dates that drive automated messages in TalkBox helps you to understand how to use them in your customer engagement strategy.

The Dates That Matter are:



CREATION DATE

The date a contact is added to TalkBox



REGISTRATION DATE

This will depend on your connection partner, but it's the date the contact was added to your connected database. If your relationship with TalkBox comes later than the start date of your engagement or loyalty program, this date will be key to ensuring older customers are still engaged and well prepared to suddenly start receiving communications, especially if you have been quiet on email and SMS for a while.



FIRST VISIT DATE

The first date TalkBox has observed a transaction. If this is blank, it may mean that the contact has never identified themselves in a transaction, or they haven't had any transactions in the period that TalkBox has data for. This may need special attention from a communications and operational perspective. Is it easy for your customers to identify themselves in a transaction? Are your staff consistently asking customers to scan their member card? Have you taken the friction away with a digital loyalty card, but they don't have one yet?

Guide to *The Dates That Matter*



LAST VISIT DATE

The last date we observed the contact transacting with your business directly



EXPECTED NEXT VISIT DATE

When a contact in your database has had 3 or more visits, TalkBox uses our machine learning algorithm to predict the next date that the customer is expected to visit. We use the expected next visit date to send reactivation messages to get customers back when they are trending away. This can be more informative than a last visit date, which assumes all customers have the same visitation profile.



NEXT BOOKING DATE

Depending on the type of connection you have, you may have the details of an upcoming booking. This can be used to send communications about your business to prepare the customer for their visit



RENEWAL/SUBSCRIPTION RENEWAL DATE

If your connection is for a membership program, TalkBox presents the date your contact is set to renew. This date can be used to send early renewal communications, offers and reactivation deals for those who have missed their renewal date



DATE OF BIRTH

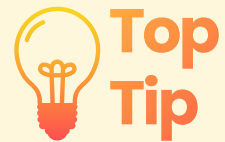
where TalkBox is aware of the DOB, it can send a range of communications about a contact's birthday. From function bookings to specials for their big day or even catering suggestions, birthday communications are a key driver of visits

Guide to *Formula Fields*



TalkBox can also calculate dates with our Formula Fields function. Some examples of using Formula Fields to create a new date and trigger messages include:

- ☐ ___ weeks to your Milestone Birthday
To advertise your functions or catering
- ☐ ___ days or weeks to Mother's Day, Christmas, etc.
Build excitement for big retail occasions
- ☐ ___ years you have been a member (Anniversary)
To trigger thank you messages and recognition of your relationship
- ☐ ___ points/stamps to your next loyalty reward
If that is a fixed reward point



**Top
Tip**

These dates can also be used as Merge Fields in your communication to add another layer of personalisation.

Guide to *The Date-Triggered Messages That Matter*



WELCOME SERIES

although also part of our Basic series, the welcome message can be further enhanced when your TalkBox account is connected to a data partner. From adding key loyalty information, such as points balance, to sending a series of TalkBox vouchers to help customers explore different parts of your menu, a welcome series can build strong relationships.



REVISIT MESSAGES

these are sent in the early stages of the relationship to get new customers to return. The key is to build your business into a habit by understanding the likely visitation patterns of customers and triggering messages accordingly. For example, if your business is a cafe or gym, it's important to get customers back within the first week, compared to a fine dining restaurant, where it's unlikely you would see the customer more than a few times a year. We can easily adjust the interval at which the messages are triggered to align with an optimal visitation pattern.



RETAIN MESSAGES

The first date TalkBox has observed a transaction. If this is blank, it may mean that the contact has never identified themselves in a transaction, or they haven't had any transactions in the period that TalkBox has data for. This may need special attention from a communications and operational perspective. Is it easy for your customers to identify themselves in a transaction? Are your staff consistently asking customers to scan their member card? Have you taken the friction away with a digital loyalty card, but they don't have one yet?

These Retain messages effectively act as a loop to catch your customers if they fall out of the expected next visit pattern; regardless of how many visits they have had, they will get a prompt at the intervals you have set up.

The date-triggered message series is all about you creating a personalised experience for each of your customers and works in conjunction with your broader engagement and promotional communications to drive more visits, more often.

Guide to *Loyalty & Membership Messages That Matter*



If your TalkBox account is connected to a loyalty or membership program, we can use a combination of analysis, dates, and loyalty fields to create a comprehensive loyalty engagement strategy that will help deliver a return on your loyalty investment.

[> READ OUR BLOG ON CREATING LOYALTY MESSAGES WITH IMPACT](#)



WELCOME TO PROGRAM

when a TalkBox account is created, we often have a high percentage of customers who have not been engaging with the program and don't have any visits recorded. We have also observed in some programs that new customers join up after their first transaction, so we don't get visibility of their behaviour. A Welcome To Program is a great way to remind new customers about the value of your loyalty program, and remind them how to engage. It's also helpful to remind existing customers that they are members and show their card or identify themselves in the transaction. This message is actually sent as a recurring message on a quarterly basis, only targeting those without a visit.



MILESTONE VISIT MESSAGES

whether triggered simply by the number of visits or a loyalty metric from your data connection, these communications help to keep your customers engaged with your brand and acknowledge how important they are to your business. They can help to move your members quickly through your loyalty rewards program.



MEMBER NURTURING

when you have other data sources such as booking data or even a newsletter sign-up on your website, TalkBox can detect that a contact has not yet become a member and send them an invitation to join. This is a great message to include a strong sign-up offer.

Guide to *Loyalty & Membership Messages That Matter*



SUBS/MEMBERSHIP RENEWAL

if TalkBox is aware of the renewal date of your members, we will set up automated messages to ensure customers renew. We have seen strong success with an early renewal offer that's redeemed on-premise to drive renewals and a visit! We don't just have one message to ensure your important renewals happen. TalkBox can set up a series of communications that are designed to maximise your renewals.



HIGH POINTS EARNERS/NO REDEMPTIONS

if your loyalty connection provides details to TalkBox of Points Balance and/or Lifetime Points Redeemed, we can set up messages targeting those critical segments. High Points Earners are targeted to ensure they redeem and stay engaged, and those who have never redeemed are reminded how to actually redeem their points.



LOYALTY ACTION

in some cases, TalkBox can be made aware of a loyalty action by our connected partner. For example, the member has hit a milestone, and their reward has been issued. When TalkBox is notified of this action, we send a message to let the customer know. We have seen a significant increase in the redemption of these loyalty offers with the Loyalty Action communications.



LOYALTY STATEMENT

whether as a standalone message or built into your email template, the loyalty statement is a valuable way to keep your members informed of their progress with your program. Consider if you have points or tiers, creating a [Formula Field](#) to show customers how close they are to the next reward.

TalkBox creates marketing-ready data every day. This means that there are a number of other automations that can be delivered based on your data connection and loyalty or membership program objectives.

Read our Best Practice Guide for TalkBox

GET THE FREE GUIDE >



Read our Messages That Matter Guide

GET THE FREE GUIDE >

For more information:

If you would like assistance using the visits fields and activating automated communications please contact our support team.

Get in touch >

Support Centre >



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