

Are you contemplating taking on behavioral targeting and optimizing customer touch points through triggered email messaging? Take a step back before tackling this animal. While building messaging programs and triggering these from disparate business events is pretty baseline for ecommerce sites, the sheer magnitude of building these programs can be cumbersome to many. Many email teams struggle to achieve baseline reporting on campaign work, now add a layer of messaging that is customized to a 1:1 interaction, potentially customized with variable content and you have the making of a very difficult program to report and manage over time.

I firmly believe this is why most companies haven't evolved past text messaging for opt in messaging, confirmation messages and reminder notices.

Here is my view of triggered messaging and how I categorize these:

The Functional Trigger: All site, membership and notices are considered functional triggers. There is a finite functional reason to communication, it may be a double opt-in notice, a password notification, profile updates, or site side updates. This could be a credit card expire notice, shipping notice, or customer service response. Anything that is driven from a system based on a user's interaction with one or more systems. In many cases this could be a welcome message for new customers or a series of messages, which offer functional value to the consumer in the form of information and education in a functional manner.

The Membership Trigger: This is probably a bad term as it can mean so many things to people, but I define a membership trigger as an event message designed to facilitate a new membership, old membership and/or renewal. Typically this is driven from timed business events tied to a membership status. This could be your monthly statement delivery, or special programs driven based on loyalty factor; like length of customer status or value.

Specialized Trigger: This is a wild card, but I throw these triggers into this category as they are quite specialized to the individual. A message is triggered based on a key date or profile characteristics of the customer. This could take the form of a birthday reminder, anniversary reminder, wedding reminder, notices of other's birthdays. This has really taken off in the social networking space with so many managing much of their social profiles online. The trigger is this profile event and status.

Transactional Trigger: Exactly as it sounds. There is a transactional event and can take the form of a shopping cart abandonment notice, or simply reminder notices of purchased items. This can often resemble the functional triggers, but the design is to facilitate a commerce event not simply to notify of such.

Sales Cycle Trigger: We see this in the lead generation field all the time. I call this lead incubation. These are triggered messages keyed off of product interest and an interaction with a sales system (call center, web or sales consultant). It can take the form as follow-up messages, product notifications, and information requests. What makes this so vital is the timing and tying the messaging relevance to the rest of the sales process and customer need state.

Event Trigger: While each of these are event triggers, what I mean here is a physical event. This could take the form of a monthly webinar, live seminars, or other public events. To systemize this means you are in control of your marketing programs and ahead of the curve. Most are adhoc communications, but a few and proud have institutionalized this to a smooth process of pre-event, reminder, event facilitation, event follow-up and then triggers into a e-sales cycle.

Behavioral Trigger: The perfect world of matching behaviors, purchase, action and profile based events and tying customized communications to these events. It takes a bold marketer to take this on, since the shear magnitude of managing this and the changing variables, on-the-fly promotions and changing dynamics of your business can make this a full-time job and harder to understand the return on the effort.

Making decisions on what to customize, what to do in step one and how often to refresh content, business rules and reporting are the keys to making this work. Triggered messaging and reporting should be reviewed in detail monthly and quarterly. Templates should be setup to support rapid on the fly changes and the APIs you use shouldn't be so customized that you can't review, monitor and change these regularly. So if you decide to take this on, be sure to write your own program business rules for how you'll manage this and what hypothesis you hope to drive as a result.

While there are many other contextual reasons to trigger a message, if you can find a baseline to implement a few of these, you'll find it has incremental value to the rest of your email programs. Test it and see what the lift is to your email marketing program after adding this to your tool kit. Customers do appreciate good messaging, creative thought and timing that is appropriate.

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