

moengage

# Omnichannel Retail Strategies in the Era of Connected Experiences

Get your customer engagement on track by employing these strategies, frameworks, and multi-channel workflows.



Omnichannel retail trends



Customer Journeys



Engagement workflows



Campaign frameworks

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# Introduction

You may have read in the news about several retailers having to shut shop in 2020. A whopping [11,000 fashion stores](#) closed business in the US alone. Analysts predict that over [100,000 stores will disappear by 2025](#). The pandemic is just the proverbial final nail on the coffin. Retailers were already facing challenges due to growing competition from e-commerce companies. This trend is not exclusive to the US; retailers across the globe are witnessing the disruption.

The only way to thrive in this environment is to take a connected retailing approach (omnichannel engagement). This is because customer behavior has been changing rapidly. Shopping today is no more about browsing and buying from online websites or entering a store and making a purchase. Hence, retailers cannot remain pure online or offline players. They have to be present in all the places where their customers shop and integrate all the customer touchpoints to create a connected experience. Some customers may prefer to research online and buy at the physical store, while others may browse through the products in the store and buy online. Some may even prefer 'click-and-collect' - buy products online and collect them from a physical store. Retailers have to be prepared for all kinds of customer journeys. They have to rethink their engagement and communication strategies to acquire, engage and retain customers in this context. In the process, they must ensure that every touchpoint delivers a consistent, convenient and continuous experience to the customer.

Here's a visual representation of how a connected omnichannel retail experience should look like:



According to an IDC research, omnichannel experience can improve the customer's lifetime value (LTV) by [30%](#) and customer retention by [90%](#) as compared to a single or siloed channel approach. Clearly, a connected experience is no longer a choice. It is necessary for the future of your business. So, let's get started on this exciting journey.

# What is a connected experience?



Gartner [defines](#) a connected experience as one which provides a customer-centric experience based on how customers shop without any channel limitations. A connected experience would give customers more choice to:

- Select the channel to buy products – buy from a shop or website or even social media.
- Select their preferred mode of payment – pay at the store or pay when the product is delivered at home, or use buy now, pay later option.
- Select their preferred mode of delivery – order online and pick up at the store or buy at the shop and get the products delivered at home.

The objective of a connected experience is to provide a unified and consistent experience to customers throughout their journey no matter what channel, device or touchpoint they choose. You will have to stitch all your online and offline touchpoints together if you want to transform customers of your brick and mortar stores into digital customers and ensure that there is no friction in their shopping experience.

## How can you create this kind of unified experience, and what can you do to transform your brick and mortar customers into digital ones?

These are the topics that we will cover in this ebook along with action-oriented campaigns, real-life examples and testimonials from some popular retail brands. This ebook will help you understand current retail trends, top strategies utilized by some of the top retail brands, benefits of having an [omnichannel retailing approach](#) and marketing frameworks with workflow templates to make your retail customer engagement easier. Let's now dive straight into insightful, action-oriented insights that will assist you in your retail marketing efforts.

○ What is a connected experience?



## *Connected retail success story #1:*

Sephora has been championing the immersive shopping experience by connecting its physical stores to its online app. The brand has linked extensive information from all its physical stores and leveraged it online by allowing customers to scan and search. Using the Sephora app, customers can scan products to access online reviews and product ratings.

The brand has harnessed the immense customer data that it has accumulated over the years to offer the most exceptional connected experience. In fact, the brand constantly monitors best performing engagement channels to understand customers' most preferred touchpoints. Acting on this information has helped Sephora boost its digital sales.

# SEPHORA

# Current omnichannel retail trends



The first step, before you start creating an omnichannel marketing strategy, is to know the trends dominating the retail industry. This will help you determine what channels to target while designing your strategy. Let's look at a few omnichannel retail trends that you can implement in your existing marketing mix to reach your customers.

**Please note:** These trends are based on the average buyer's behavior. If your target customer or demography is very specific, we recommend that you closely monitor their shopping behavior and then reach out to them on their preferred channels.

Also, be aware that customer shopping behavior is constantly evolving. For example, who knew a decade ago that retailers could send push notifications to customers to alert them about upcoming sales instead of sending them a flyer with the daily newspaper? So, keep yourself updated about latest practices to ensure that you are not missing that one big touchpoint that has the potential for high conversions.



## 1. Focus on social channels

Given the increasing purchasing power of millennials and Gen Z, you will have to focus your strategies considerably on them. Both [millennials and Gen Z spend the most on products they find on Snapchat and Instagram](#). So, if these are your target customers, you need build your presence on social channels. From hosting live videos, uploading product videos, creating topical posts and adding a 'shop now' button below all the posts, you can leverage social media platforms in many ways. You can also collaborate with micro-influencers related to your industry to create awareness about your brand.

Creating quizzes, contests and other promotional activities is a great way to encourage customers to engage with your posts. Whatever you implement, ensure that it is integrated with the existing strategy seamlessly and does not negatively impact the customer's shopping experience.



## 2. Add more touchpoints

Unlike earlier, when there were just two touchpoints – offline and online - the current times demand more. You can no longer predict your customer's journey. They can research online and buy from the store or see a product in the store and research and buy online from the website. Although the click-and-collect model, i.e., buying online and picking up from the store, has emerged as a preferred mode of shopping, the pandemic revealed customers' inclination towards curbside pickup. In this form of shopping, customers need not travel all the way to the retail outlet to pick up the product. They can place an order online and pick it up from their local store at a convenient time. According to a survey, [67%](#) of respondents said they would prefer curbside pick up even after the pandemic ends. Cost effectiveness, smooth experience, convenience and flexibility are some basic expectations that customers have from retailers. Look for ways to make shopping seamless and convenient by adding and integrating more touchpoints.

## ○ Current omnichannel retail trends



### 3. Bridge gaps with immersive experiences

If online shopping offers convenience, offline stores can offer immersive experiences to customers. In 2017, Sephora, a makeup retailer, launched an AR-based virtual artist service called the [New Sephora Experience](#). The virtual artist helps the customer experiment with different beauty products and offers [personalized recommendations](#) through an iPad or a connected mirror. Once the customer is satisfied with their final look, they can upload the makeover on Beauty Board – Sephora’s social media platform. You can use AR and VR technologies in your store to create an immersive experience and increase customer engagement. You can also provide additional in-store features. For instance, Starbucks offers Spotify integration that identifies artists and songs being played in the store along with providing personalized food and beverage recommendations based on the customer’s order history. This gives the customer an incentive to try the Starbucks app. Find ways to bridge the gap between different touchpoints so that you can provide both seamless experience and convenience to your customers.



### 4. Focus on building a long-term relationship

Millennials and Gen Z prefer to shop with brands they have an affinity for. If you want to improve customer lifetime value (LTV), i.e., if you want to retain your customer for a long time, you need to build a lasting relationship with them. Loyalty rewards are one way of doing this. Take Starbucks, for instance. 48% of smartphone users said that the Starbucks mobile app is their favorite restaurant app as it always rewards them when they use the app to pay. Younger customers love loyalty points so much that they [willingly provide additional data to get extra rewards](#). Find out ways to retain your existing customers. After all, customer [retention](#) is more cost effective and less resource-intensive than acquiring new customers. The best part is that happy customers recommend brands they love, and people love buying brands endorsed by family and friends. Customer loyalty is one way to acquire more customers organically.

*To learn tactics about increasing customer LTV, [read our blog.](#)*



# Why do you need a connected experience?



## 1. Recognizes user behavior across multiple channels

The success of your brand is based on the experience of your customers across multiple channels. To build a superior and consistent experience, you have to understand how your customers behave online and offline, their buying preferences, the kind of events that trigger purchases etc. The offline and online data can be used together to [get the whole picture](#) of the shopper's profile. Connected experiences work best to get these insights. If online analytics captures critical data such as behavioral and purchasing patterns of the user, in-store analytics can help in capturing data such as the neighborhood that customers prefer to visit the most. These insights can be consolidated to determine the right offers on the right products to trigger conversions.

## 2. Magnifies user activity to grow micro-conversions

A customer rarely buys a product during the first visit to the website. You need to create small 'aha' moments to gently nudge them towards a purchase. That's where micro-conversions come in. These are smaller conversions where you get a customer to follow you on social media, add a product to the cart, add an out-of-stock product to the wishlist etc. Micro-conversions will help you build a long-term relationship of trust and loyalty with your customer. Connected experience can be useful in growing micro-conversions and also helps increase user activity by sending emails or personalized push notifications when the product is in stock, leading to macro conversion or the actual purchase of a product.

○ Why do you need a connected experience?

### 3. Highlights critical user moments to lower drop-offs

Imagine walking in an aisle inside a shop. You find an interesting product but there is no one around to answer your questions about the product. You wait for some time for the store staff to show up and finally leave without purchasing that product. The shop lost a critical moment to convert you. These unplanned moments are critical because the shopper is in the consideration stage. If you do not leverage this stage to your advantage, you will lose conversions. Instead of just knowing how customers behave online or offline in silos, focus on thinking of them as a whole. As an HBR-AS report stated, [73% of searches happened offline](#) and just 16% on the phone before a product is purchased. With connected experiences, you can integrate the offline and online channels and create a single-view inventory so that your customers can buy anything, anywhere without any hurdle. It is this approach that led Target's customers to spend 3x more on average than those who shopped from a single channel.

### 4. Allows relevant, personalized communication across channels

It is no secret that customers prefer a personalized experience and communication across all channels. However, retailers forget that personalization involves much more than adding the first name in the [push notification](#) or [email](#). If you want to make your communication relevant and personalized across all channels, you have to carefully analyze all the touchpoints throughout the buyer's journey. The good part about connected experiences is that all the data from different channels are available in a single place. So, your team can easily access past and real-time data about the customer and use this to personalize the communication.



### 5. Boosts customer LTV with loyalty programs

Do you know that even a [5% increase in customer loyalty can increase the average profit per customer](#) by 25% to 100%? If you want to boost customer lifetime value, you need to create winning loyalty programs to retain them. However, restricting the loyalty program to online or offline could significantly limit the customer's buying experience. Customers should be able to use their loyalty rewards on any of their preferred channels without any hassle. The connected experience makes this possible. You can include value-additions such as integrating easy payment options or awarding more points on purchasing from the app or a store to [boost engagement](#).

○ Why do you need a connected experience?



## *Connected retail success story #2:*

Stitch Fix, a personal styling service in the US, has been vocal about its customer retention and growing customer LTV. While it is common for retail stores to offer discounts or assign loyalty points, Stitch Fix has been able to retain more than 40% of its customers in the last 12 months without a loyalty program.

Stitch Fix has created this LTV magic by allowing existing customers to sign-up for 'Direct-Buy' that allows them to buy a single item without having to purchase their usual 'Fix' box. This Direct-Buy was an instant hit as the brand was able to provide customers with a sense of ownership of buying their own piece of clothing while offering fashion recommendations based on historical data.



**STITCH FIX**

# How to build a connected customer journey?



Before you start implementing a connected customer journey, you need to have a clear blueprint of how to implement it and assess your preparedness. A one-size-fits-all approach could fail. You will have to build your connected experience strategy based on where you lie in the preparedness journey and gradually move towards the next stage. Connected experience strategy can be divided into three stages – crawl stage, walk stage and run stage. Let us see what you can achieve in each of these stages.

○ How to build a connected customer journey?



### Crawl

#### What happens?

Crawl is the most basic stage, but it is also the critical one because you begin to build the foundation of connected customer journeys. The channels will be disjointed at this stage.

#### Action items

Until you understand what works well for your customers, we recommend that you keep the strategy as simple as possible.

- You could begin with understanding the typical user events. These could be a customer visiting the website, searching for specific products, viewing products, comparing with other products, adding the product to the wishlist, adding the product to the cart etc.

Once you identify the trigger, focus on sending messages to drive action.

Your messages could overlap across different channels. It is fine if they are not completely personalized. The key objective in this stage is to initiate communication with your customer.



### Walk

Once you identify the triggers and get your messaging right, you can focus on connecting the dots across channels to create a connected experience.

#### Here's an illustrative process that you can follow in this stage:

- Start with creating separate clusters of messaging to acquire, engage and retain your customers across each channel.
- Determine what action you want your customer to take and select an appropriate trigger to complete that action.
- Have an alternate plan ready. Even if the customer does not proceed through the lifecycle as planned, find ways to deliver value, and retain them throughout their journey.



### Run

So, you have aced the crawl and walk stages? Now it's time to sharpen your connected experience strategy to build a long-term relationship with the customer. This is the stage where you also use customer insights to hyper-personalize their experience.

#### Here are some action items that you can follow in this stage:

- Leverage data points to trigger personalized campaigns for your customers.
- Considering that you have reached this stage, you might have already created the best experience for your customer. They are likely to engage with your brand for a long time. This could be an ideal moment to introduce a loyalty program.
- Remember to collect feedback through post-purchase surveys to improve the brand's reputation.

### Examples



#### Crawl

When a customer follows you on social media, you can send them a personal message to thank them for following your handle and share a link with information about your website. The objective is to initiate a conversation with the customer.



#### Walk

Here are some examples to start creating connected experiences:

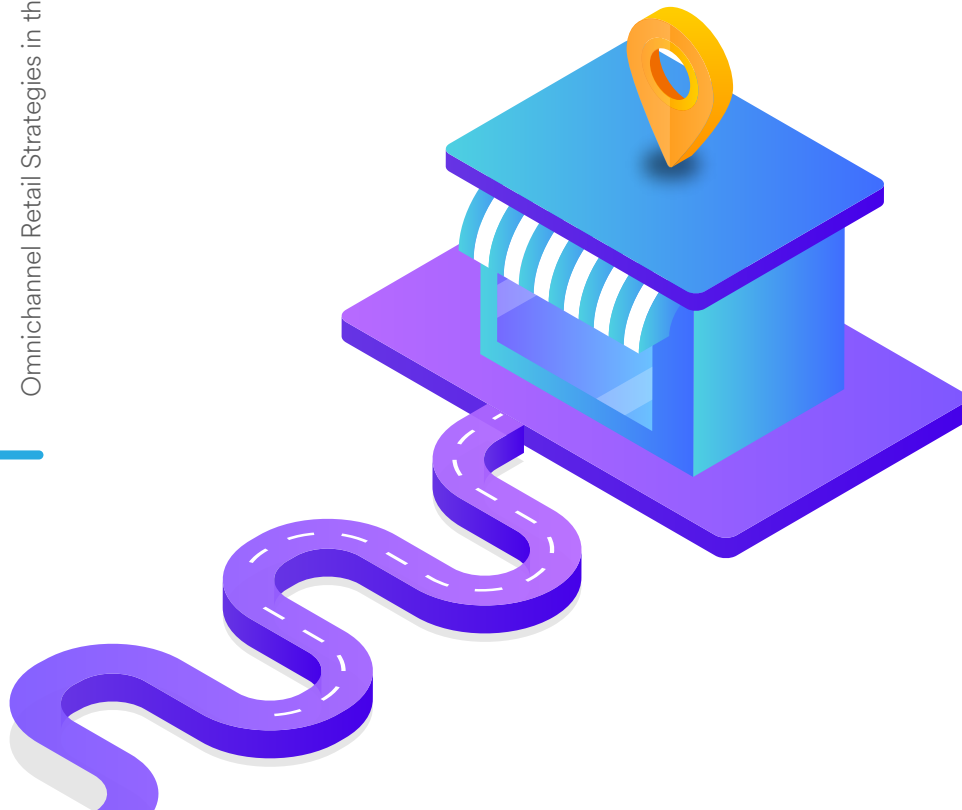
- If your objective is to acquire new customers, your customer journey steps should include creating awareness about your brand on channels such as social media, attracting the customer to visit your website, giving them a new member discount etc. to complete the first transaction.
- If the customer has abandoned the cart, you could trigger a message through email or push notification to remind them to complete the checkout process.
- For customers who are likely to churn, you can work on a fresh marketing campaign to encourage them to engage with your brand again.



#### Run

Here are some ways to take your omnichannel retail marketing to the next level:

- You can trigger a focused campaign in a specific country for special occasions and send personalized communication to inform your customers.
- You can trigger special offers and incentives based on customers' past purchases or activity to build loyalty.
- You could also offer special promotional discounts that your customer can avail at a nearby store. These special benefits can go a long way in building a long-term relationship with your customer.



- How to build a connected customer journey?



### *Connected retail success story #3:*

Sainsbury's, the second largest chain of supermarkets in the UK, recently executed a 'single-minded' digital marketing strategy to create a more connected customer experience. The main focus of the brand is to consolidate user data across multiple channels and offer a relevant, dynamic and highly connected engagement and experience.

The brand's three-point approach for this strategy is to **segment -> target -> engage**. First, the team segments users based geography; next, they create targeted product tiers based on pricing to ensure they map value-conscious buyers to the right products; and lastly, Sainsbury's utilizes a dynamic engagement approach across channels by sending personalized messaging at the optimum time.

# Sainsbury's

# Best practices to use engagement workflows?



Once you know how to [build a connected customer journey](#) and the stage you are in, the next step is execution using engagement workflows. It is very crucial that you have engagement workflows mapped across your customer journey, i.e., from micro-conversions (link clicks/page visits) to macro conversions (purchase).

Remember, you need to carry out a series of activities to engage customers throughout their journey – right from the time they register on your app or website to the time they add items to a wishlist or complete a purchase. However, the journey doesn't end here. You have to repeat the process for each new or existing user, every time they become active on your app or website..

Before we deep-dive into creating campaign frameworks and engagement workflows, let us look at the top four best practices for creating engagement workflows:

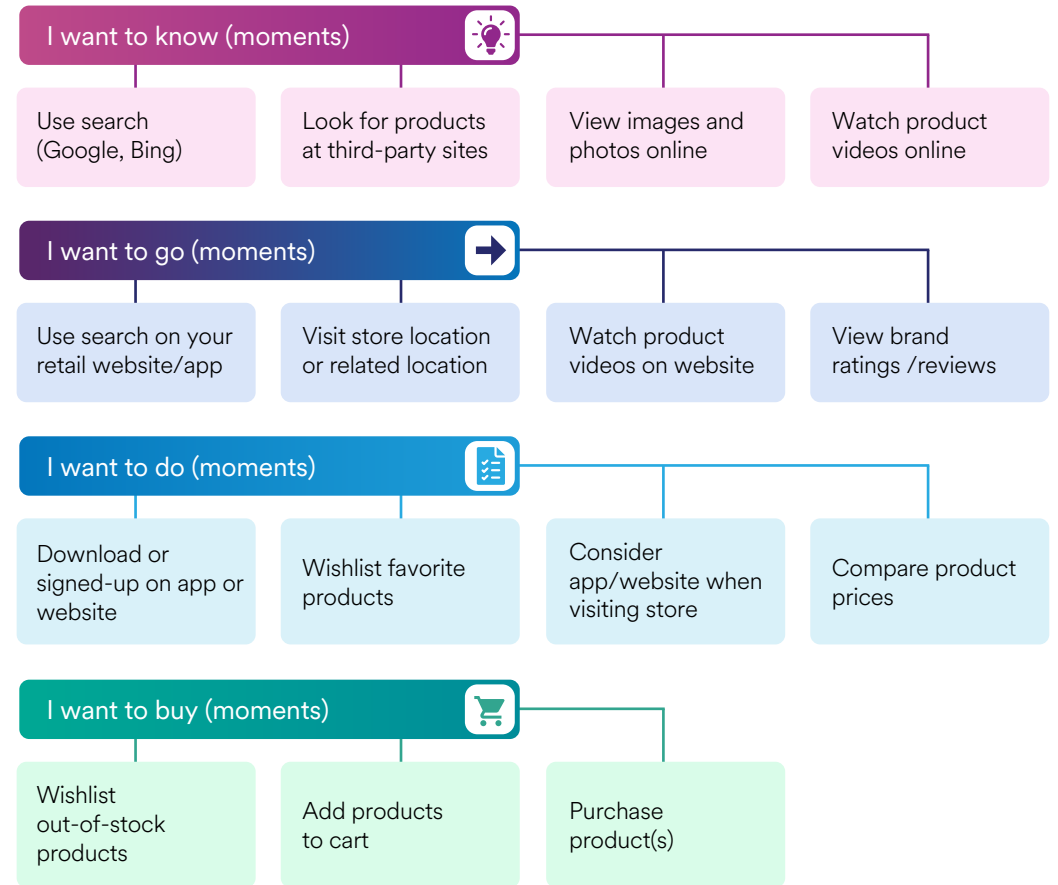


## Best practices to use engagement workflows?

### 1. Analyzing micro-moments to create connected journeys

Customers don't usually decide to buy a product at the first glance. A purchase is preceded by several micro-moments (or mini actions/events). These intent-rich moments can completely turn around the purchase decision. A typical retail brand, selling any product, will notice that customers who have these moments move on to become macro conversions (purchase). So how do you figure out these micro-moments?

It's not difficult - every action that customers take from the time they either download your app or land on your website is a micro-moment. Here's a quick look at how micro-moments leading to macro moments look like:



Analyzing these micro-moments will help you understand where and what your customers are doing before purchasing a product. Analyze the moments that matter to your bigger goal, i.e., purchase. Understand the multiple channels accessed in those moments and see how you can make them work in tandem for better engagement. Use these moments to create a connected purchase journey for your customers.

- Best practices to use engagement workflows?



## *Connected retail success story #4:*

Lifestyle, India's leading multi brand fashion chain with over 80 stores across 44 cities, observed more than 1 million app installs but their current active user base on the app was only 15K. This dormant user behavior was affecting overall conversions and ROI on the app. The brand's marketing team resolved to implement a purchase funnel based engagement strategy focusing on micro-moments.

The team first analyzed user drop-offs at each stage of pre-purchase moments. Using this analysis, they were able to determine the stages where users were dropping off from the app. Additionally, the team utilized MoEngage's RFM analysis tool to identify the target audience to focus on — price-sensitive, loyal or lost customers. Finally, they triggered smart communication across multiple channels such as email, push notification and SMS based on funnel stages urging relevant users to complete the purchase within a day's time. This micro-moment campaign helped Lifestyle to improve conversion time to 15 minutes from the earlier 14 hours to as long as 2 days.

The Lifestyle logo, featuring the word "lifestyle" in a white, lowercase, sans-serif font. The letter "i" has a small orange and red dot above it. The logo is positioned on a white arrow-shaped background that points towards the right, set against a blue background.

- Best practices to use engagement workflows?

## 2. Segmenting by tags, events and actions

Once you understand the micro-moments, it's time to utilize them to organize your customer journey. Having a solid [segmentation](#) strategy for your customer base will not only help you engage with them at the right moment but will also allow you to hyper-personalize your communication.

The core problem that segmentation solves is clustering customers with the same traits (events or actions) together. This eventually allows you to customize how you engage customers based on their particular purchase journey. Till a couple of years ago, the basic segmentation parameters used were:

- **First purchase customers**
- **Cart abandoned customers**
- **High or low-purchase intent customers**
- **Loyal customers**

But customers' buying patterns have changed over time and their purchase journey has turned hyper-sensitive. The best way out of this maze of evolving buying patterns is to analyze micro-moments and segment customers accordingly. All the actions created by customers on your app, website or physical store should be considered.

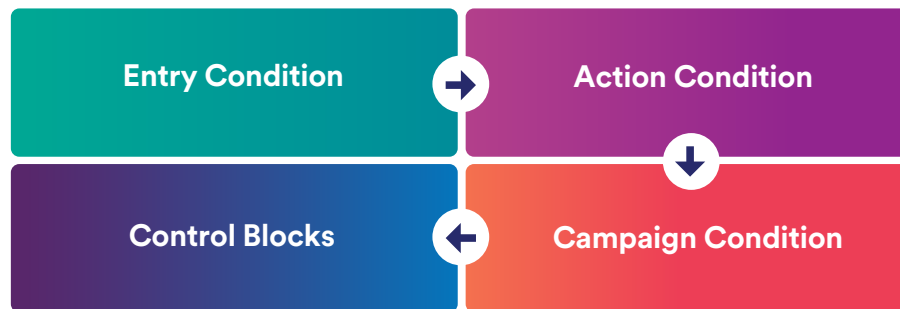
This can also be easily simplified by converting all your customer actions into specific events which then can be tagged as a parameter for segmentation. For example, if your customer searched for a particular brand then that will be your category search event/tag and all the customers who searched for the same category added to the same segment. Here are some typical actions, events and tags found for any retail customer:

Action	Event/Tag
 When a user logs in on app/website	 app-open site-open
 When a user enters your physical store	 store-activity store-location-search
 When a user completes personal profile	 profile-created
 When a user searches for product(s)	 item-search
 When a user views product(s)	 item-view
 When a user views category(s)	 category-view
 When a user views offer/promotion	 promotion-view
 When a user selects item	 item-select
 When a user adds any product to cart	 add-to-cart
 When a user removes item from cart	 remove-from-cart
 When a user adds shipping information	 add-shipping-info
 When a user adds payment information	 add-payment-info
 When a user adds an item to a wishlist	 item-wishlist
 When a user begins checkout	 item-checkout
 When a user abandons cart	 cart-abandon

### 3. Creating workflows by deploying user event and activity conditions

Once you have the micro-conversions on the basis of which you segment customers under different events and tags, the next step is to create campaign workflows to map your engagement and [conversion journey](#). Now, most retail brands use automation platforms to create these workflows. These automation platforms usually offer basic workflows on engagement, conversion and retention.

What you need to focus on is customizing these workflows to map the entire customer lifecycle based on user actions. The four important elements to be included to ensure that you create a more logical and personalized journey are:



These four elements will help you map a more relevant journey and optimize it based on where a user is in the purchase cycle. User events and activity conditions will both allow you to be present whenever the user shows a purchase intent. Also, this approach will enable you to optimize your engagement by providing more consistent, relevant and personalized communication.



**Entry condition** - defines who gets added into the workflow journey and when.



**Action condition** - determines the action to be taken when the user enters the workflow.



**Campaign condition** - evaluates micro-actions of a user such as replied to an [SMS](#), opened email, clicked on notification etc.



**Control blocks** - controls the workflow by adding time lags or connecting the current stage to any other stage.

- Best practices to use engagement workflows?



## *Connected retail success story #5:*

Tokopedia, founded in 2009, is a unicorn company and Indonesia's largest online marketplace with a user base of 75 million+ active users. The mandate for the team was to improve first month user retention through an integrated customer onboarding strategy. To reduce churn, Tokopedia automated their user onboarding, where users get to experience the brand for the first time. Tokopedia identified the various steps leading from new user onboarding to brand discovery and delivered the right message at the right time at every stage to eliminate possible choke points and reduce ambiguity for the user. The result? 60% improvement in the first-month user retention and 20% uplift in the first conversion transactions by new users.



- Best practices to use engagement workflows?

#### 4. Setting touchpoints using suitable channels

Analyzing micro-moments



Segmenting using actions, events and tags



Condition-based event workflows



The final thing to keep in mind is the channels utilized by your customers. As a retail brand, you need to focus on channels that best suit your audience instead of communicating everything, everywhere. The purpose of a connected experience is to be present where your target customers go. The channels will be different for different customers. For example, a customer in the age group of 45 to 64 might be influenced by celebrity endorsement for a product. An individual between the ages of 16 to 24 may not find this appealing and would rather trust a friend's recommendation. Sometimes, your target customers will research products online before buying at a store. Hence, select channels based on what your target customer uses.

Once you have established the channels that you want to be present in, ensure that you set the right touchpoints for your customers. Using engagement workflows, you can craft unique messages for each channel and deliver a consistent experience to customers based on purchase journey stage and channel activity.



# Easy-to-use campaign frameworks and workflows with examples

Your customers are constantly switching channels. So, your focus should be on creating engagement workflows that can easily trigger communication based on their behavior and preferences. Even when they hop from device to device and online to in-person and back again, ensure that all your channels are working in-sync and communicate accordingly.

A recent BCG survey of global executives states that 90% of marketers are now using Artificial Intelligence to optimize the customer journey, transform how they engage consumers and deliver the most rewarding experience. Improving customer experience can go a long way in supercharging channel performance and fueling revenue growth and profit. This is why you need to focus on:

micro-moments

user events and

user activity conditions



Engagement workflows help you map all this and more. They allow you to implement different engagement strategies at every stage of the customer journey in a logical and seamless way. They also help you stay prepared for all types of actions that a customer can take in the process of purchasing a product. Moreover, engagement workflows enable you to engage with your leads continuously, move them through the funnel and eventually convert them and boost conversions. An engagement workflow will help you fix gaps in the process of moving customers from one stage of the journey to another and ensure that they complete the intended action, such as purchasing a product, smoothly.

Instead of following each customer throughout their journey and engaging them with several one-off messages, you can create robust flows that work according to predefined logic. As we learned earlier, this logic is based on the user's micro-moments, events created and app activity. Using workflows, you can put all the activities in each stage of the customer journey on autopilot while offering personalized engagement.

- Easy-to-use campaign frameworks and workflows with examples



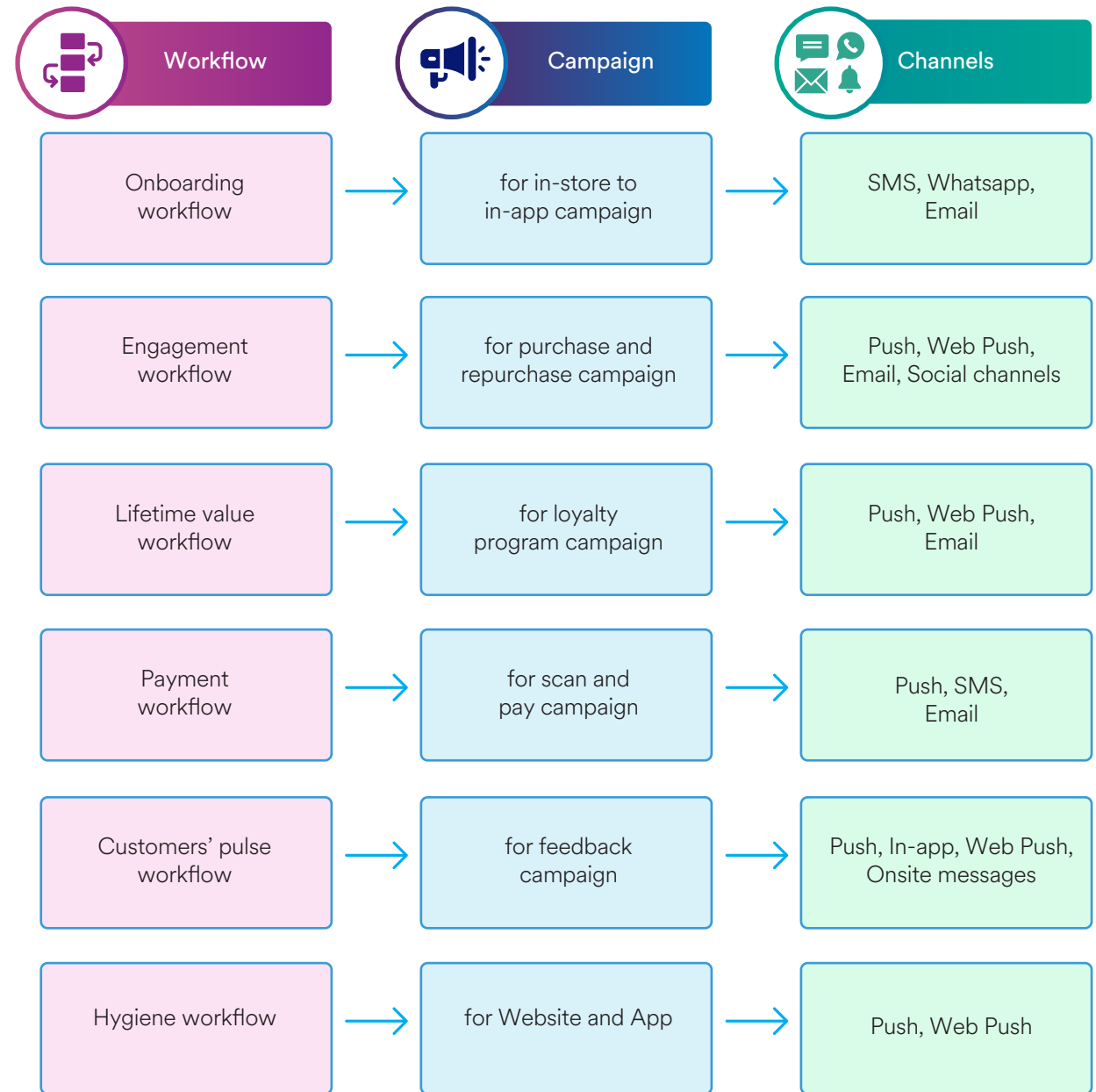
## *Connected retail success story #6:*

6thStreet.com, the e-commerce arm of The Apparel Group, registered a significant growth in sales during the 2018 Black Friday season. This growing volume indicated a shift in consumer behavior. To deliver 10x growth, the team needed to understand this shift as well as the consumer journey, likes, preferences and buying patterns. They had to engage consumers with personalized communication at every touchpoint. 6thStreet's team carried out consumer profiling and based on their lifecycle stage, preferences and behavior, engaged consumers with personalized messages across multiple channels such as email, SMS, Facebook ads and push notifications. The result? 2x improvement in first-time purchase rates and 4x growth in business contribution.

6THSTREET.COM



In this section, we'll focus on six fundamental workflows that will help any retail/e-commerce brand to map customer journeys across multiple funnel stages. Interestingly, these workflows will also help your brand to determine the accurate channels for engagement.



- Easy-to-use campaign frameworks and workflows with examples

# Campaign 1: Onboarding framework and workflow

[In-store to in-app campaign using SMS,  
WhatsApp and email channels]

## Specification:

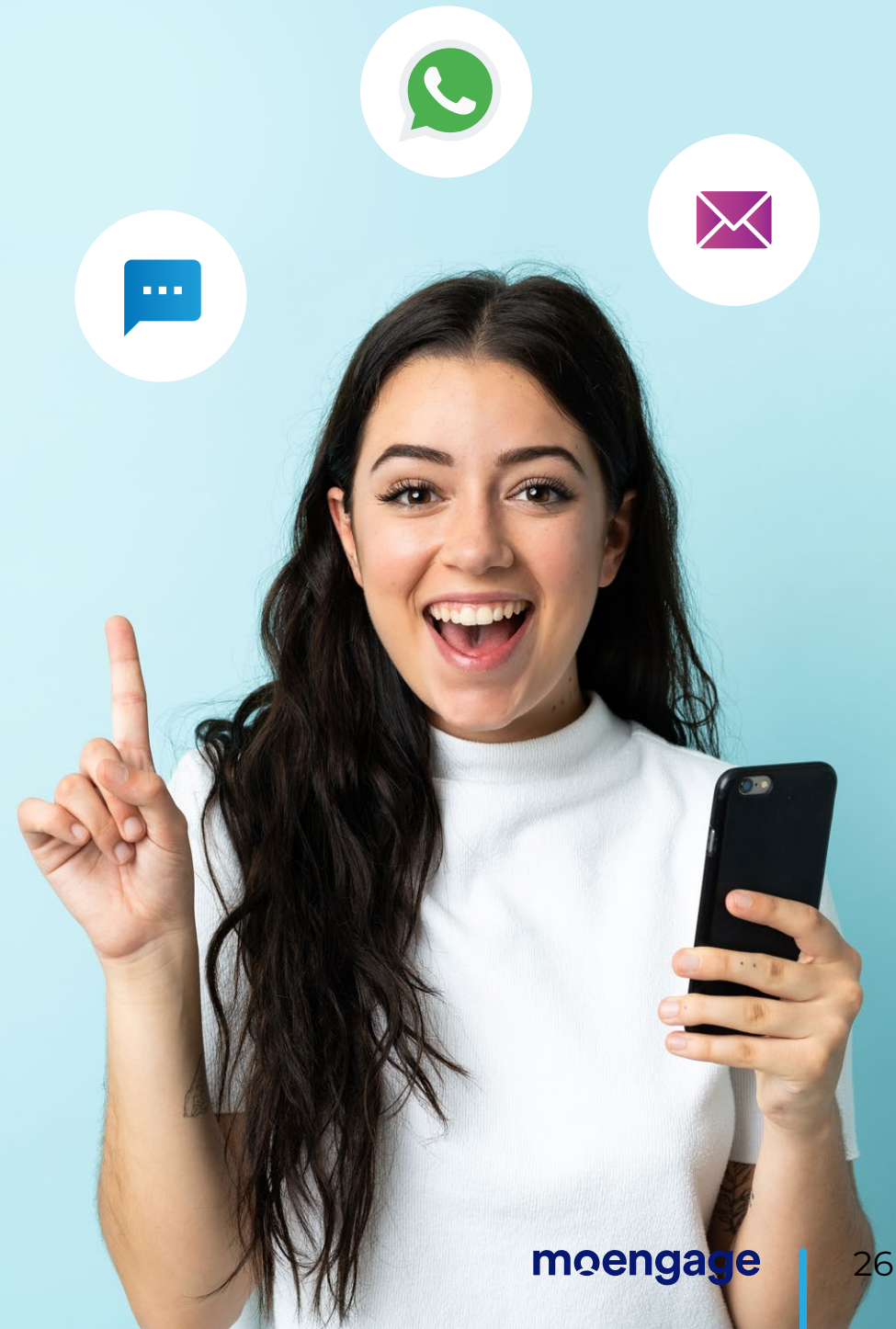
If you are managing a brand that has footfall in the physical store, use this campaign to provide a seamless and quick shopping experience. Even if there is no footfall, the campaign provides a more agile way to shop.

## Focus:

To get users to download/sign-up for the mobile app or register on the website.

## User types:








- Existing or loyal users who shop from your store more than once a month.
- Abandoned users who drop off mid-way through a purchase (reasons--bad experience, confusing aisles, long check-out queues etc.).
- New users who desire ease in their shopping experience.

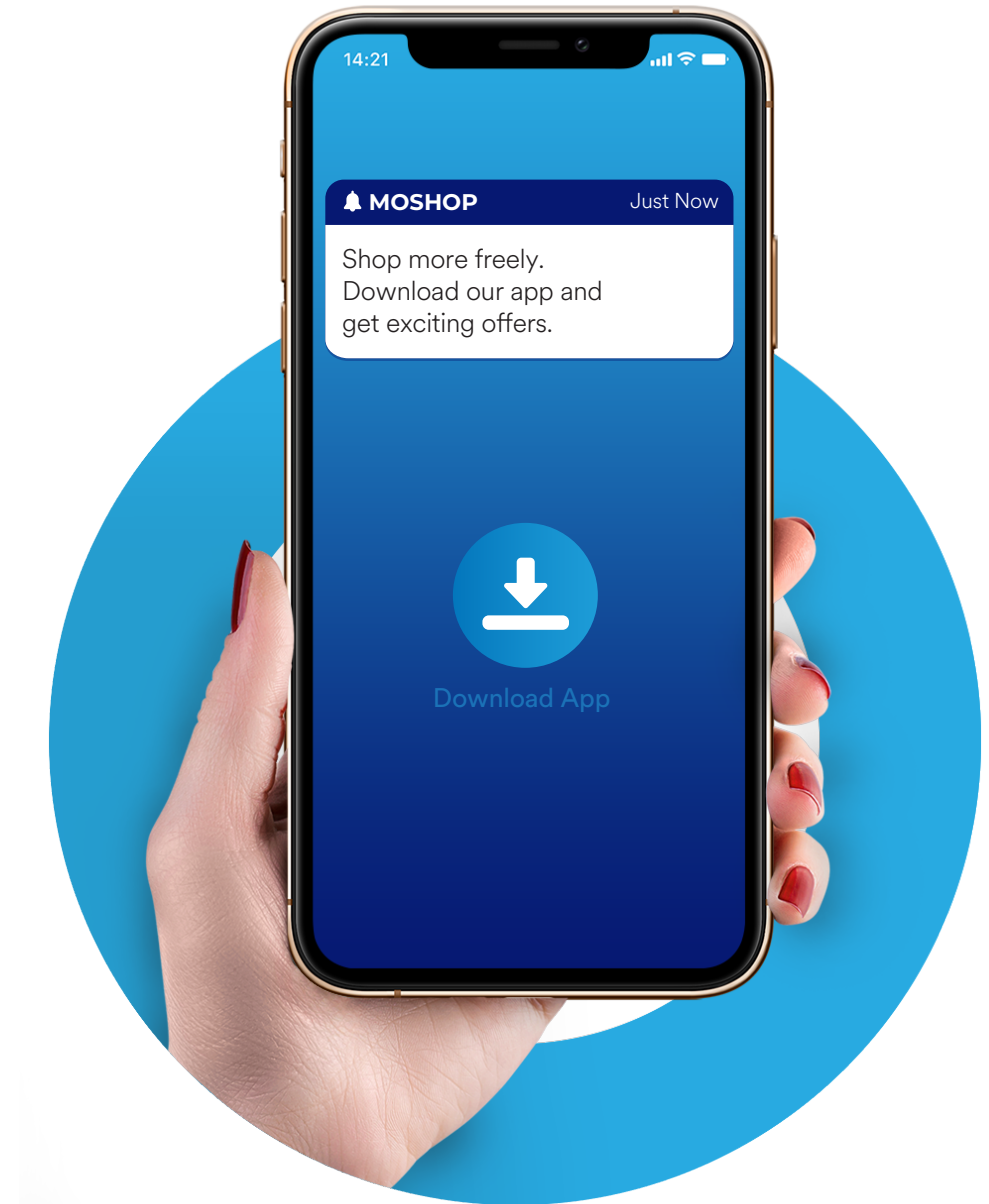


- Easy-to-use campaign frameworks and workflows with examples

## Onboarding framework






a. Existing or loyal users who shop from your store more than once a month.

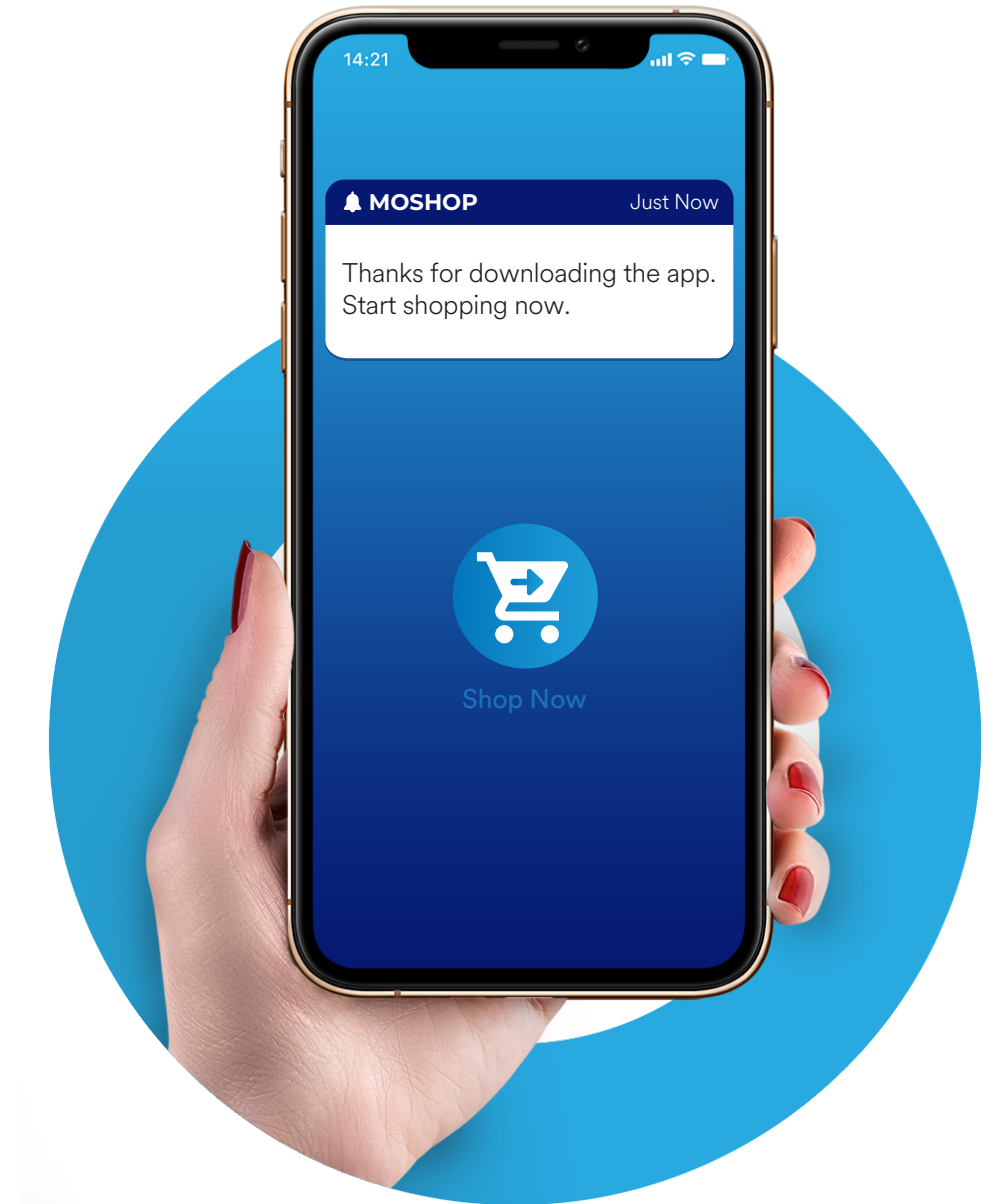
 Campaign rationale	→	Drive website sign-up or app downloads (can also use QR codes around the store).
 Communication intent	→	Promote ease in shopping using the website or app.
 Channels	→	SMS and WhatsApp.
 Trigger periodicity	→	30 minutes, 1 hour, 3 hours, 1 day, 3 days and 5 days.
 Primary conversion goal	→	App download and sign-up complete.
 Secondary conversion goal	→	Profile created.
 MoEngage features implemented	→	Create onboarding flows with customer <a href="#">journey orchestration</a> .



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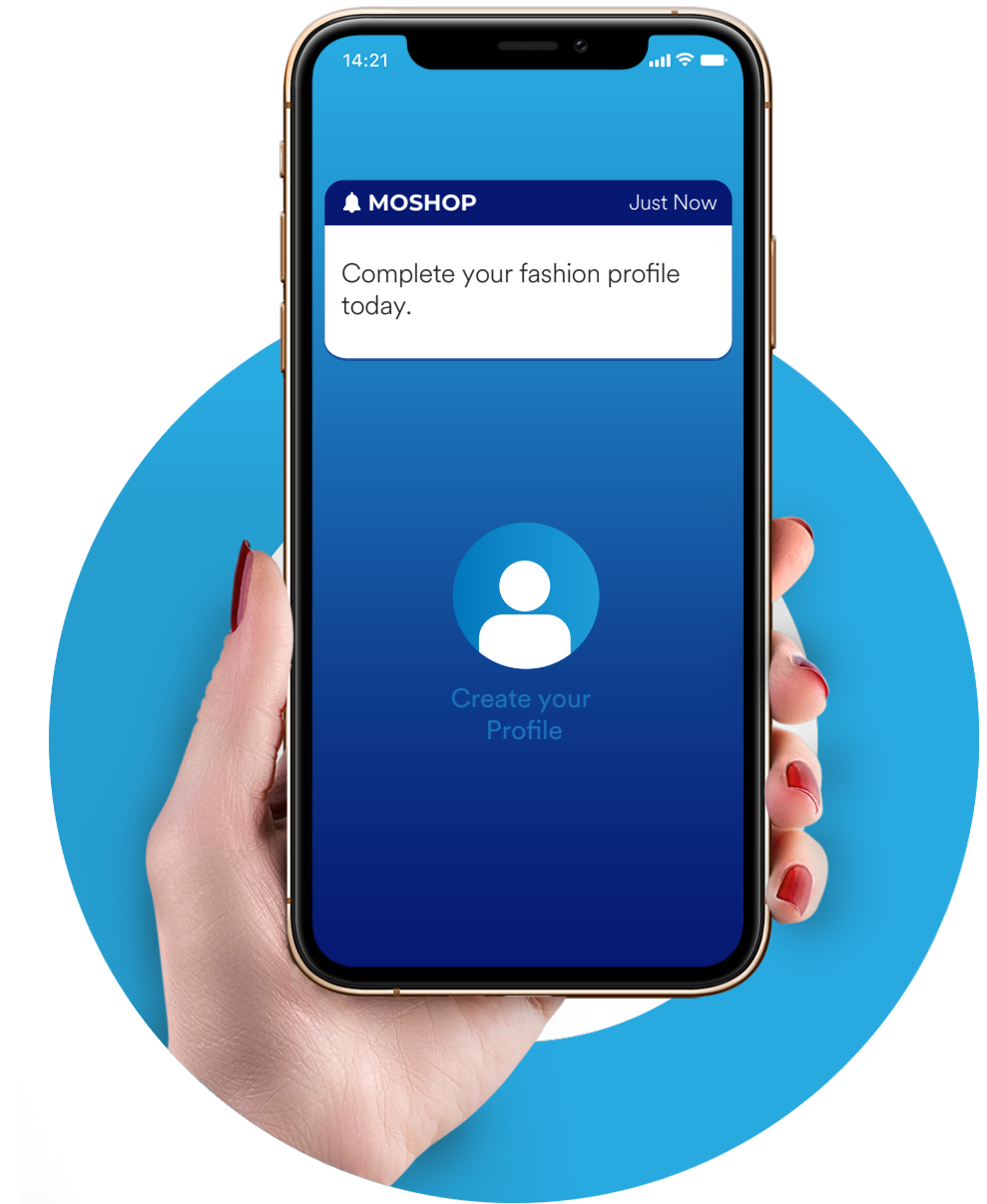
## b. Abandoned users who drop off mid-way through a purchase.

 Campaign rationale	→	Urge users to purchase the same product(s) using the website or app.
 Communication intent	→	Promote ease in shopping using the website or app.
 Channels	→	SMS and WhatsApp.
 Trigger periodicity	→	30 minutes, 3 hours, 1 day and 3 days.
 Primary conversion goal	→	App download and sign-up complete.
 Secondary conversion goal	→	Abandoned purchase completed.
 MoEngage features implemented	→	Understand where and why users drop off with <a href="#">User Path Analysis</a> .

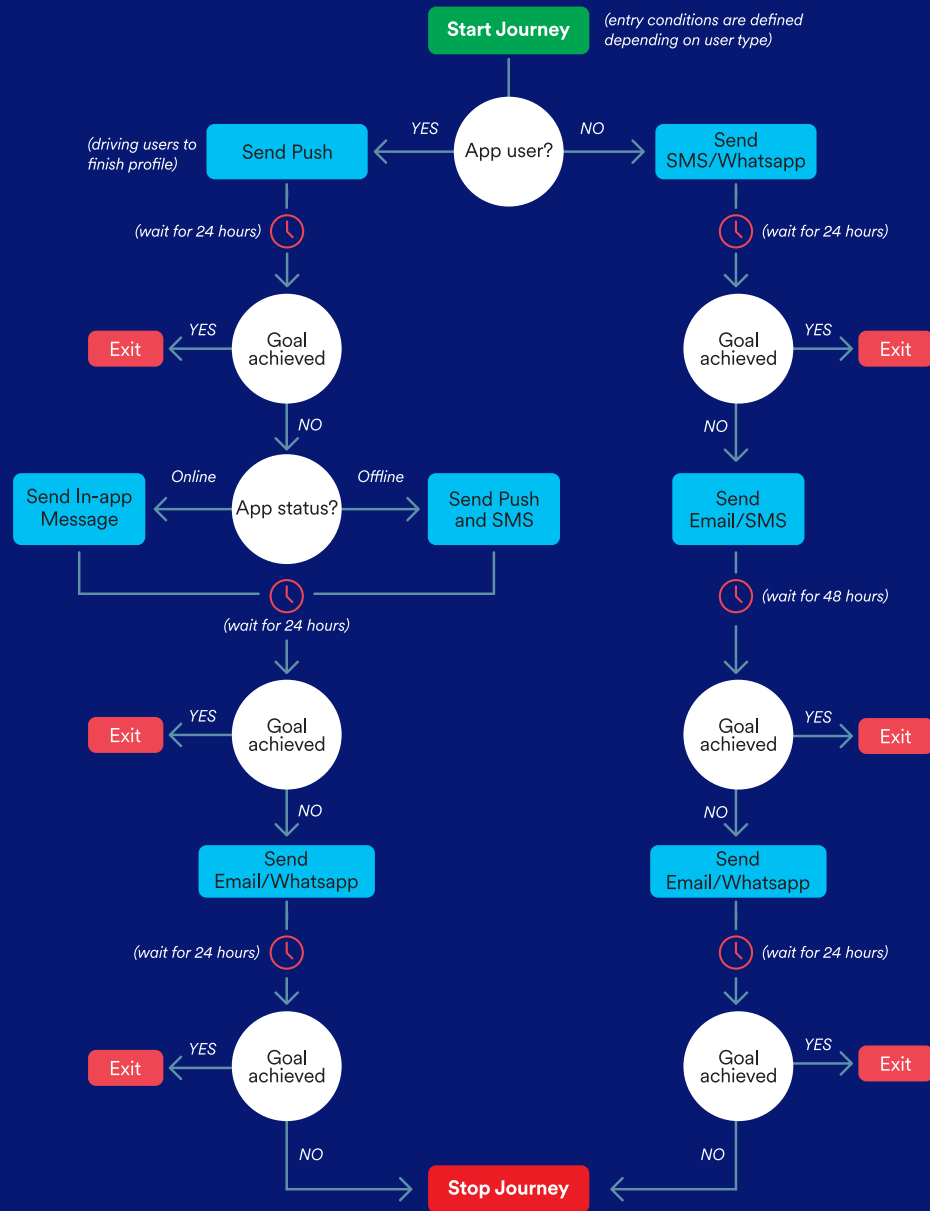


### c. New users who desire ease in their shopping experience.

 Campaign rationale	→	Drive website sign-up or app downloads (can also use QR codes around the store).
 Communication intent	→	Promote the benefits of using the website or app.
 Channels	→	SMS and WhatsApp.
 Trigger periodicity	→	30 minutes, 1 hour, 3 hours, 1 day, 3 days and 5 days.
 Primary conversion goal	→	App download and sign-up complete.
 Secondary conversion goal	→	Profile created.
 MoEngage features implemented	→	Analyze how customers navigate and interact with your brand with <a href="#">Segments</a> .



# Onboarding workflow



“  
 Being relevant to the customer is the most important aspect of combating churn for your business. If a customer has bought a sofa, there is no way we can offer them to buy a sofa again. If we give irrelevant offers, customers will tend to churn. Identifying the patterns created by customers leaving or uninstalling our products can also prevent churn from occurring. Before these patterns repeat themselves with other customers, we must take the necessary precautions before it occurs.  
 ”

**Arie Wisnu Pradono**  
 CMO, Fabelio

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## Campaign 2: Engagement framework and workflow

[Purchase and repurchase campaign using push, web push and email channels]

### Specification:

For brands that want to ensure that their shoppers are engaged and come back to the app/website to buy products; also applicable to brands that have a strategy to improve app and website engagement using personalized messaging.

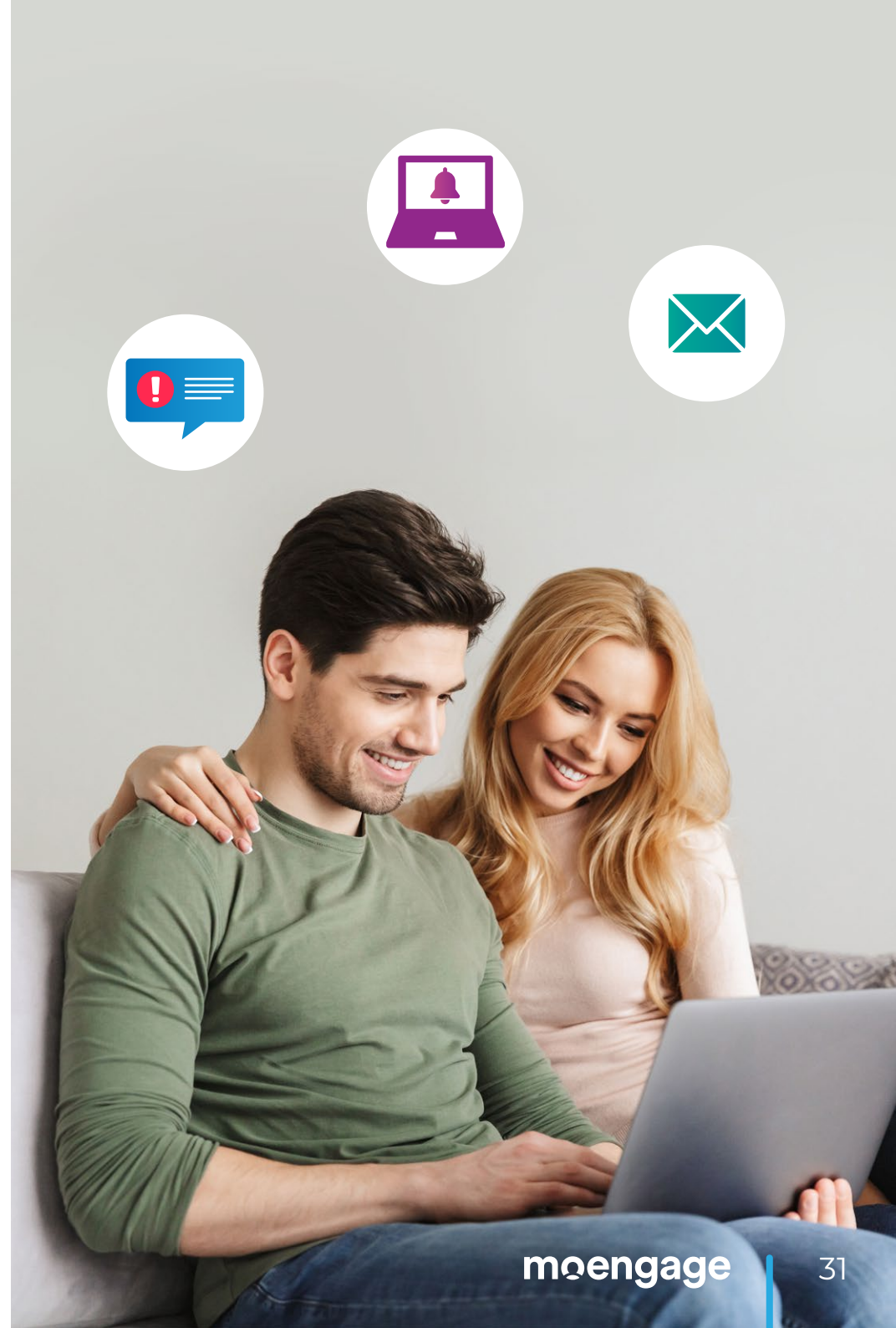
### Focus:

To bring users (active and inactive) to the app/website while ensuring they make a first-time purchase or continue to make purchases.

### User types:

- Active users who browsed or created a wishlist but didn't purchase; or completed first purchase but didn't come back.
- Abandoned users who dropped off during purchase.
- Inactive users who have stopped using the app.

Back to all Campaigns

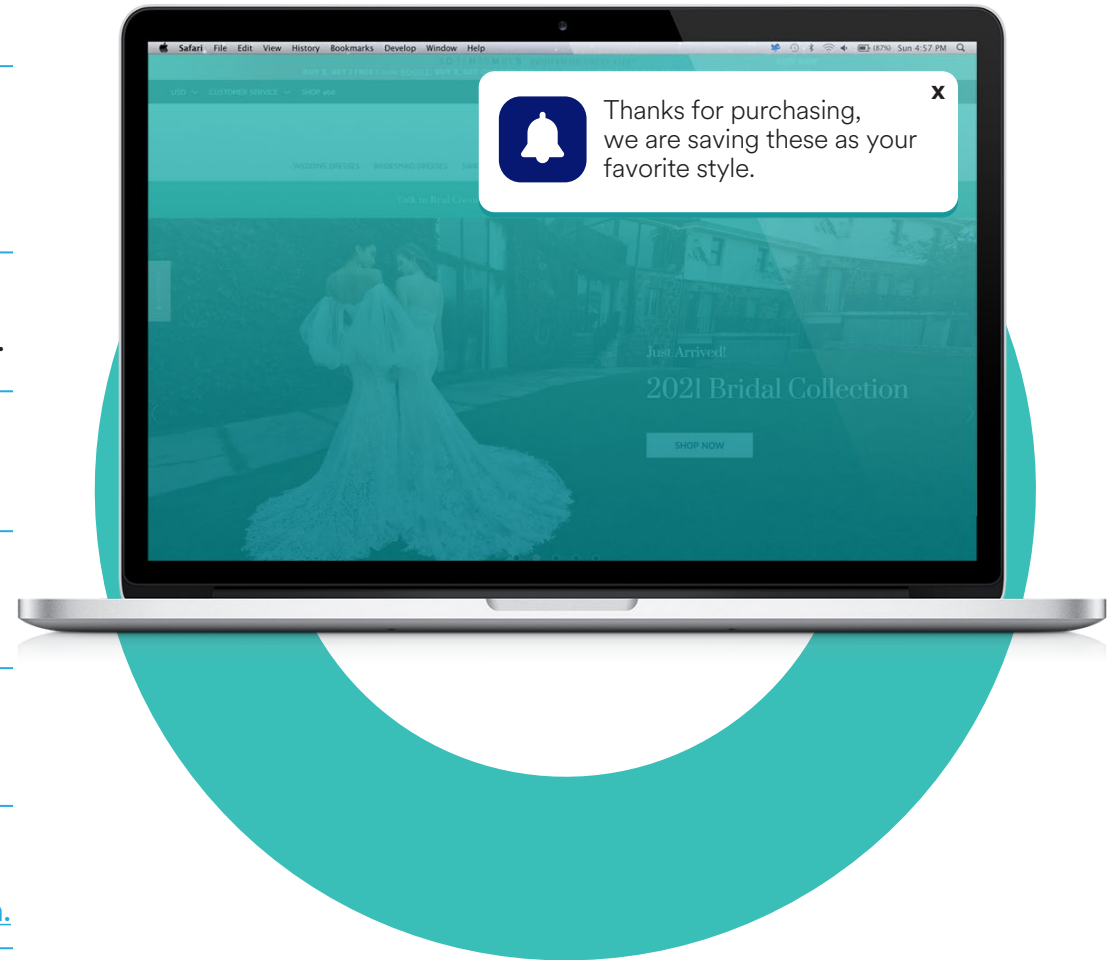


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## Engagement framework

a. Active users who browsed or created a wishlist but didn't buy.

	Workflow entry condition	→	Users who completed first purchase or browsed products.
	Communication intent	→	<ol style="list-style-type: none"> <li>1. Endorse users' favorite brands to drive purchase.</li> <li>2. Offer look-book to drive repeat purchase.</li> </ol>
	Channels	→	Push, email or web push (in case a user is on the website).
	Trigger periodicity	→	1 day, 3 days, 5 days, 7 days and 9 days.
	Primary conversion goal	→	At least one product purchase.
	Secondary conversion goal	→	More than one product purchase.
	MoEngage features implemented	→	Recommend the right items to bring your users back with the <a href="#">MoEngage-Pique integration</a> .

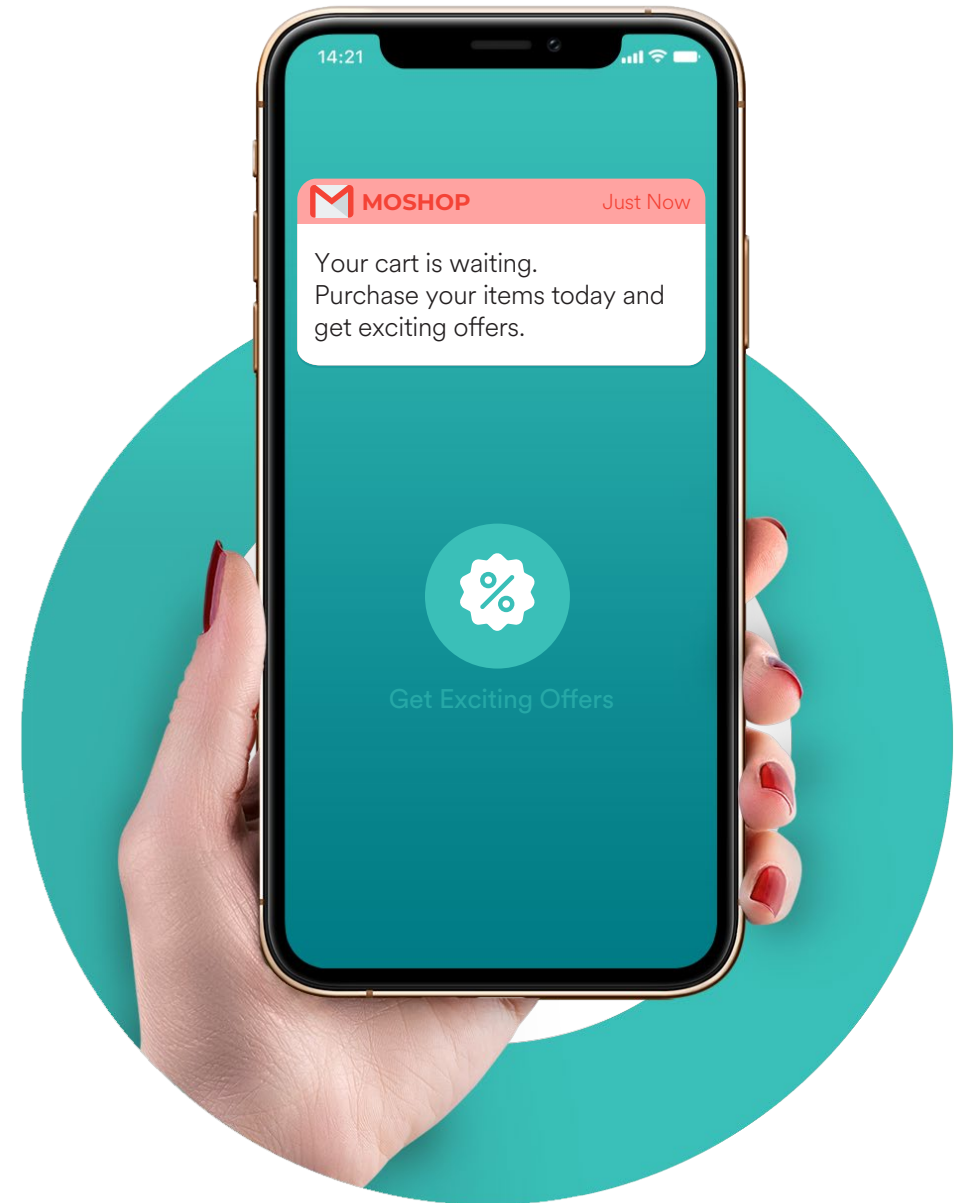




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## b. Abandoned users who drop-off during a purchase.

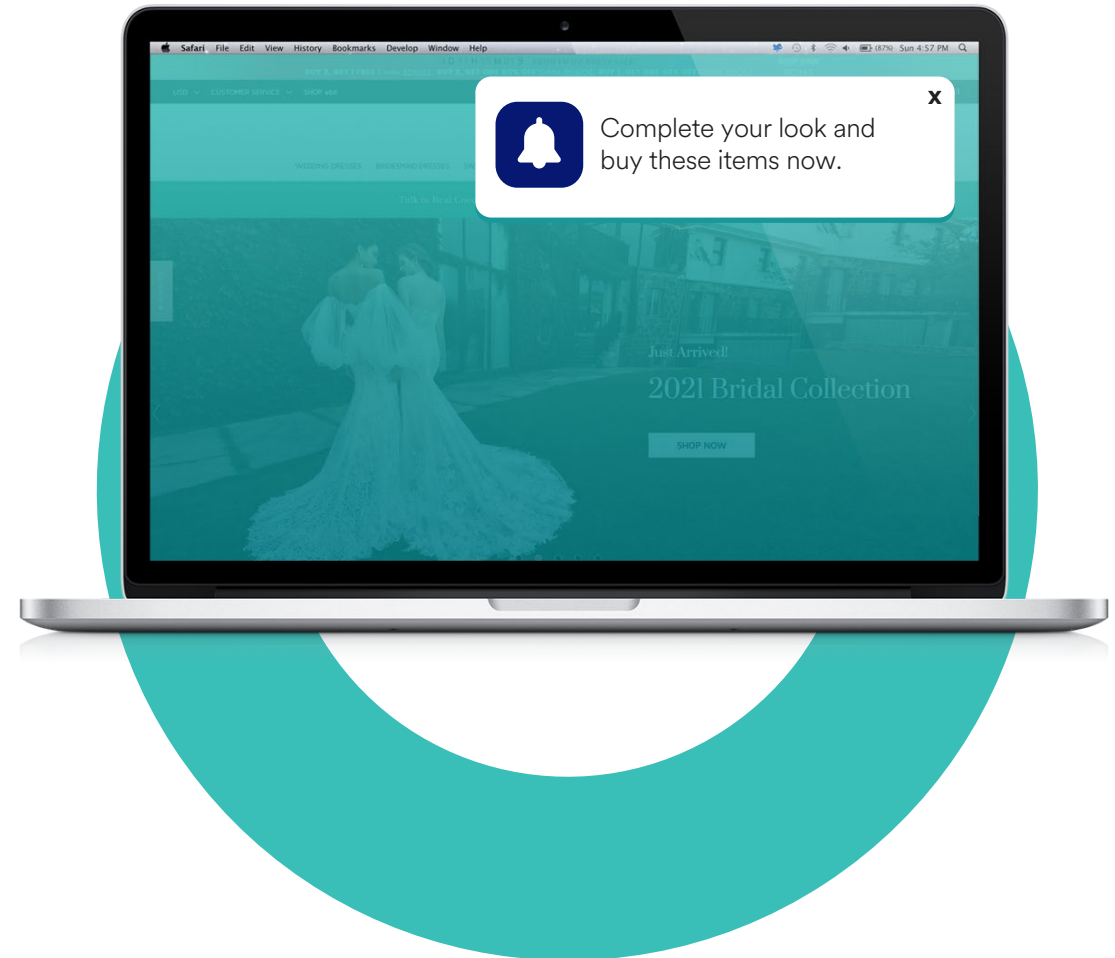
 Workflow entry condition	→	Users who abandoned their cart.
 Communication intent	→	Send a reminder to drive purchase using discounts or limited offers.
 Channels	→	Push, email or web push (in case a user is on the website).
 Trigger periodicity	→	1 day, 3 days, 5 days, 7 days and 9 days.
 Primary conversion goal	→	Complete abandoned purchase.
 Secondary conversion goal	→	Make a second purchase.
 MoEngage features implemented	→	Create custom segments and turn cart abandonments around with <a href="#">Segments</a> .



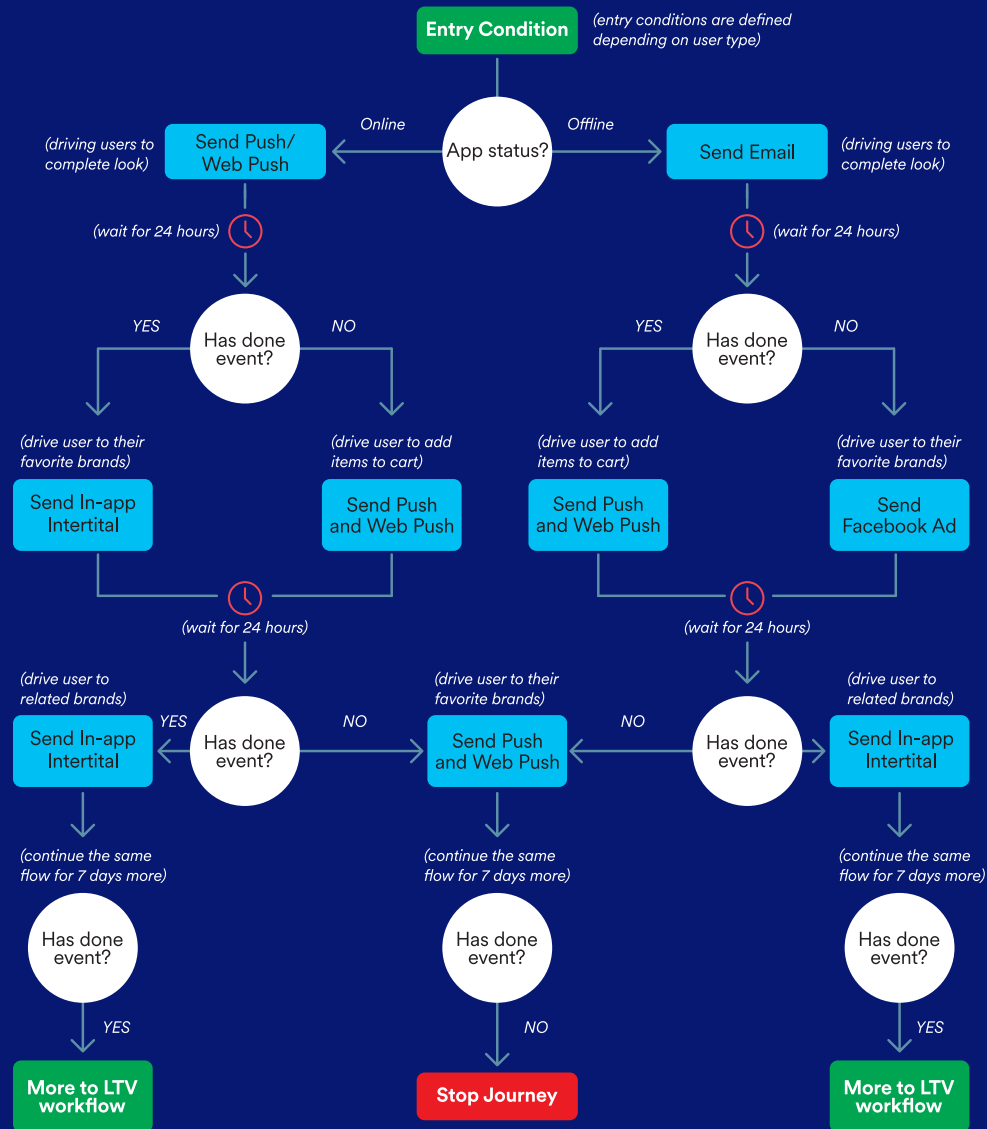
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### c. Inactive users who have stopped using the app.

	Workflow entry condition	→	Users who signed up but never used the app again.
	Communication intent	→	Send a reminder to drive purchase using discounts or limited offers.
	Channels	→	Push, email or web push (in case the user is on the website).
	Trigger periodicity	→	1 day, 3 days, 5 days, 7 days and 9 days.
	Primary conversion goal	→	Complete first purchase.
	Secondary conversion goal	→	Make a second purchase.
	MoEngage features implemented	→	Send users the right communication to bring them back with <a href="#">Mobile Push</a> .



# Engagement workflow



“  
 The bridal industry is very unique. Conversion time lag is very long, usually about six months. With the workflows, we can create several flows for dozens of campaigns with different trigger conditions to map the customer journey and keep them active on different channels, including SMS, email, push and Facebook retargeting ads. Using MoEngage, we can add as many customer attributes and custom events as we like to customer profiles, then filter customers for various campaigns and offers. We also conduct numerous A/B/C tests to help with personalization attributes in the flow, which has become a powerful tool for us.  
 ”

**James Chen**  
 Operations Director, Cocomelody

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## Campaign 3: Lifetime value workflow

[Loyalty program campaign using push, web push and email channels]

### Specification:

For brands that want to improve the lifetime value (LTV) of their loyal customers by offering merit-based, coin-based or purchase-based programs.

### Focus:

To bring loyal and active users to the app/website and ensure that they utilize their loyalty program benefits by purchasing products from other categories.

### User types:

- Loyal users who have purchased more than two products.
- Active users who finished the first purchase but didn't make another one.
- Inactive users who have stopped using the app.

◀◀ Back to all Campaigns

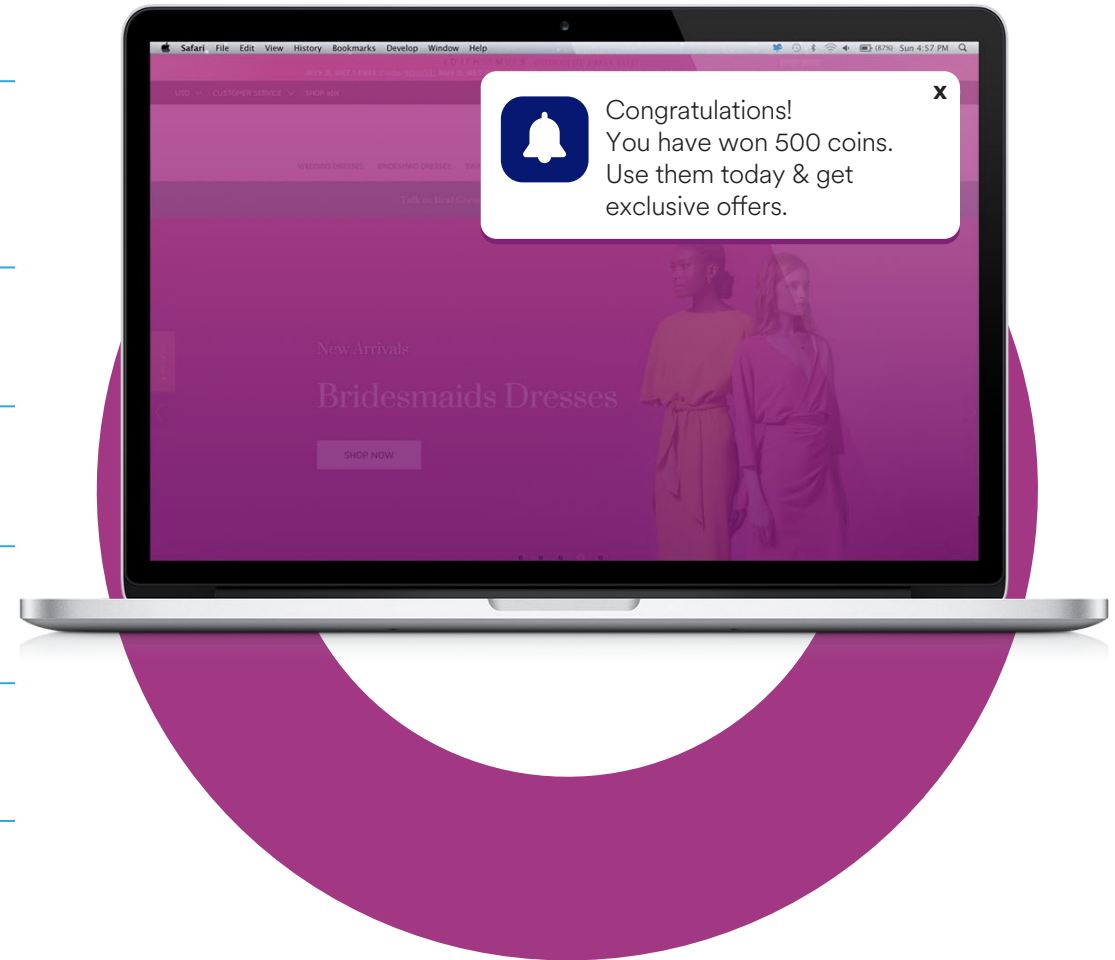


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## Lifetime value framework








### a. Loyal users who have purchased more than two products.

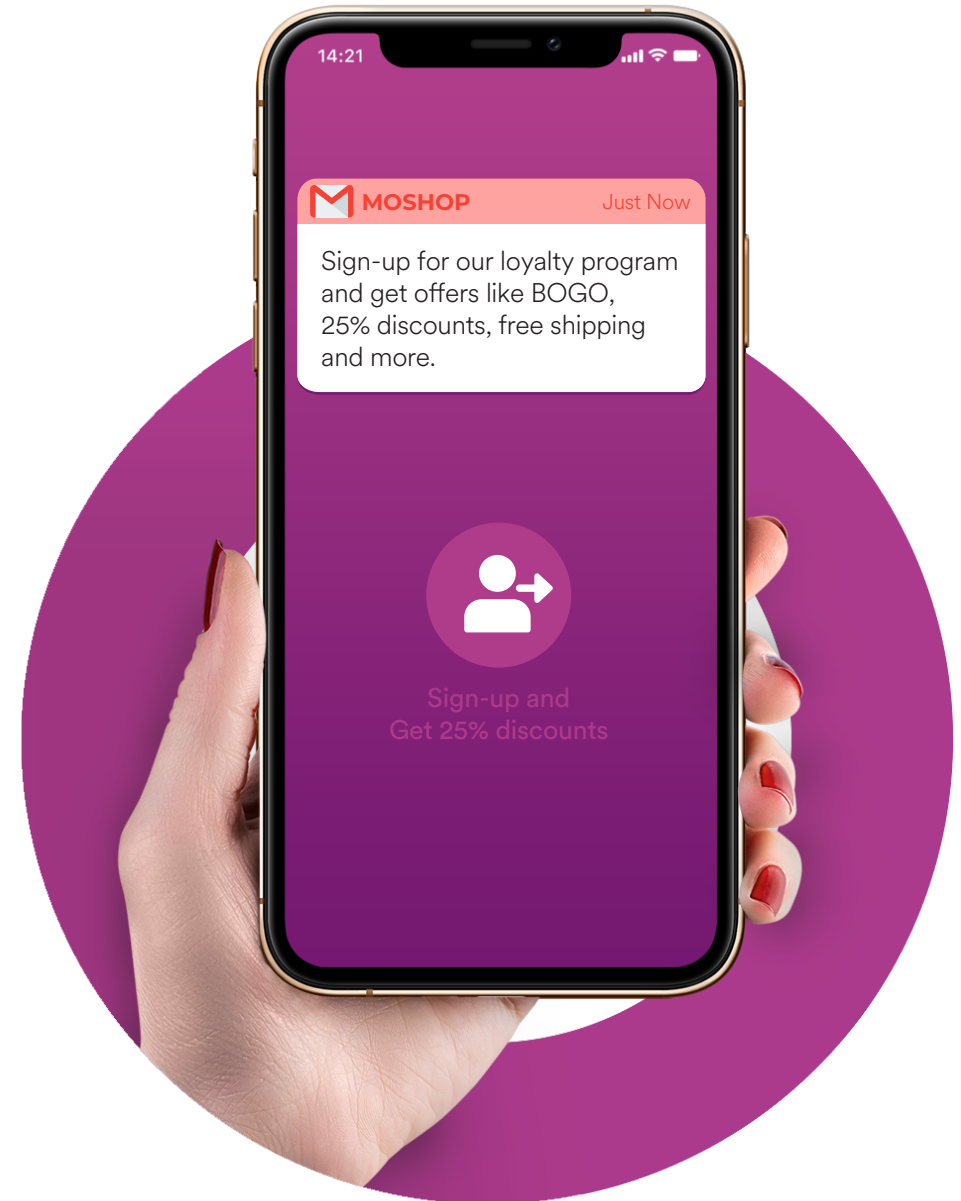
 Workflow entry condition	→	Users who have made more than two purchases.
 Communication intent	→	Drive users to sign up for the loyalty program (collect coins/points to get more discounts).
 Channels	→	Push, email and web push.
 Trigger periodicity	→	14 days.
 Primary conversion goal	→	Loyalty program sign up complete.
 Secondary conversion goal	→	Spent loyalty coins/points.
 MoEngage features implemented	→	Create <a href="#">predictive segments</a> that highlight your most loyal customers.



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**b. Active users who completed their first purchase but didn't make another one.**

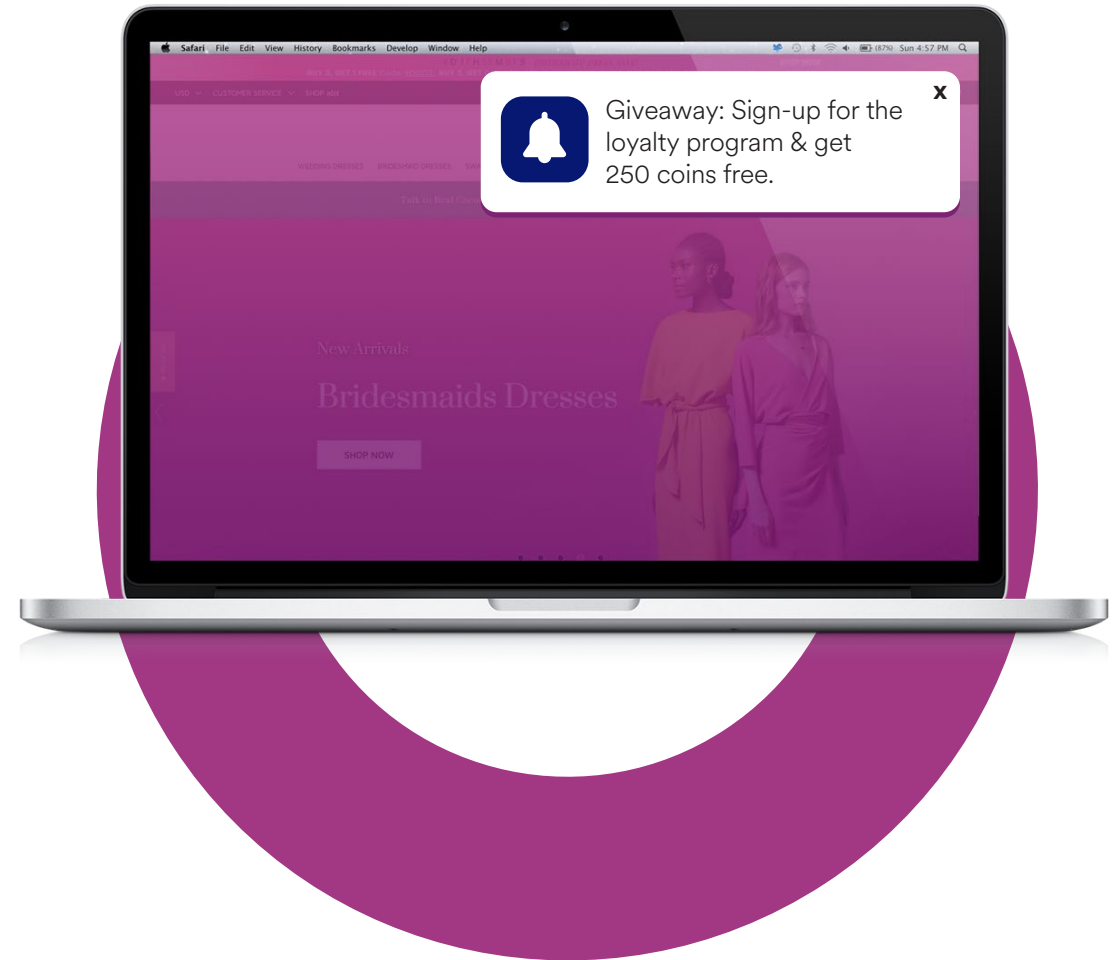
 Workflow entry condition	→	Users who completed the first purchase but never made another one.
 Communication intent	→	Drive users to sign-up for the loyalty program to get more discounts.
 Channels	→	Push, email and web push.
 Trigger periodicity	→	14 days.
 Primary conversion goal	→	Loyalty program sign-up complete.
 Secondary conversion goal	→	Purchase product(s) using loyalty coins/points.
 MoEngage features implemented	→	Send the right <a href="#">emails</a> and incentivize users to buy another product.



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### c. Inactive users who have stopped using the app.

	Workflow entry condition	→	Users who stopped using the app.
	Communication intent	→	Drive users to sign up for the loyalty program to get more discounts.
	Channels	→	Push, email and web push.
	Trigger periodicity	→	14 days.
	Primary conversion goal	→	Loyalty program sign up complete.
	Secondary conversion goal	→	Purchase a product using loyalty coins/points.
	MoEngage features implemented	→	Leverage <a href="#">predictive segmentation</a> to isolate churn risks and lost customers.







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## Campaign 4: Payment workflow

[Scan and pay campaign using push and SMS channels]

### Specification:

For brands that want to improve their in-store experience by offering a more seamless payment gateway using the app.

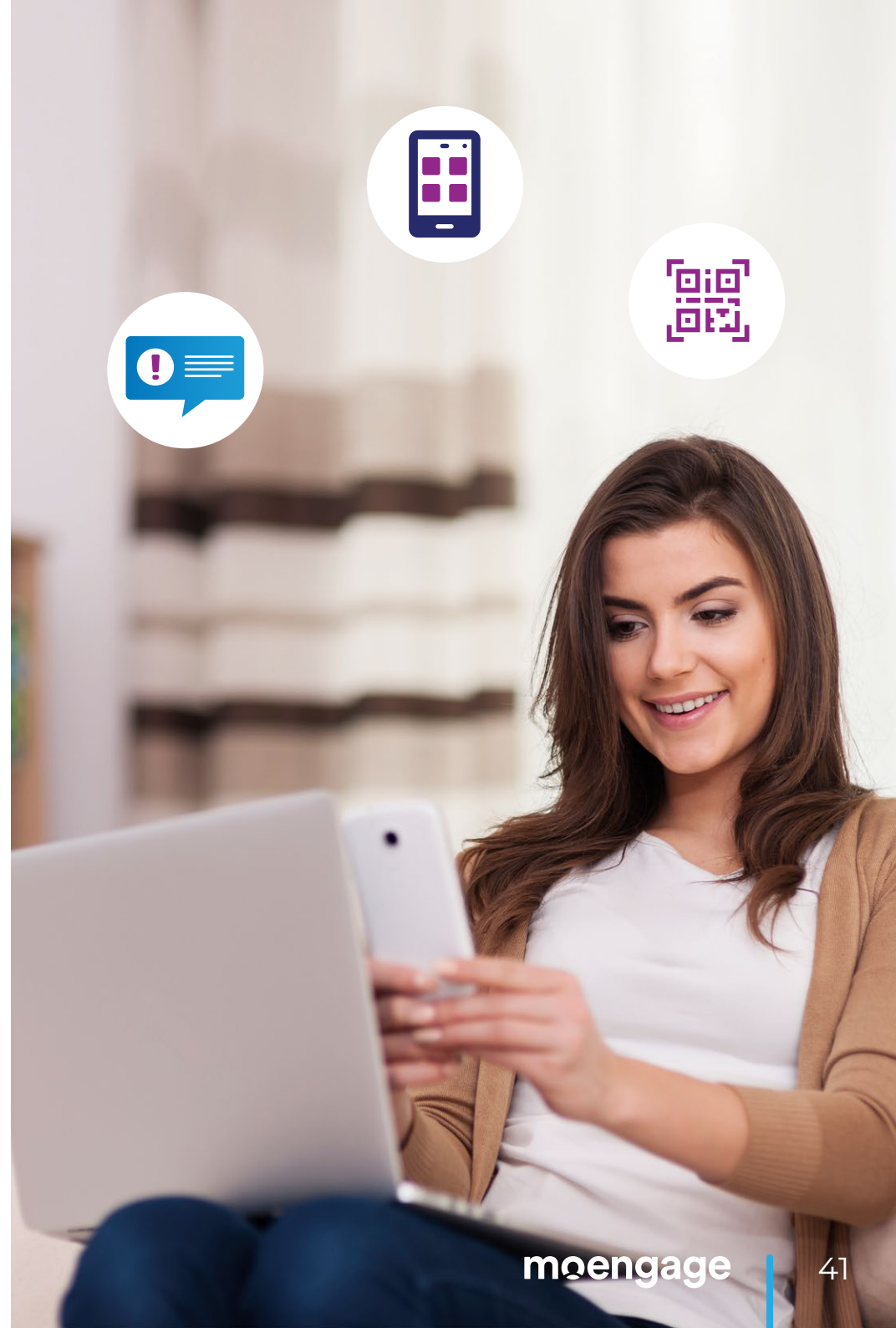
### Focus:

To bring in-store users to download the app and use it to scan product(s) as well as pay for purchases. Also, users with the app can be encouraged to utilize the same for purchasing and paying.

### User types:

- In-store users looking for ease in shopping experience.

◀◀ Back to all Campaigns

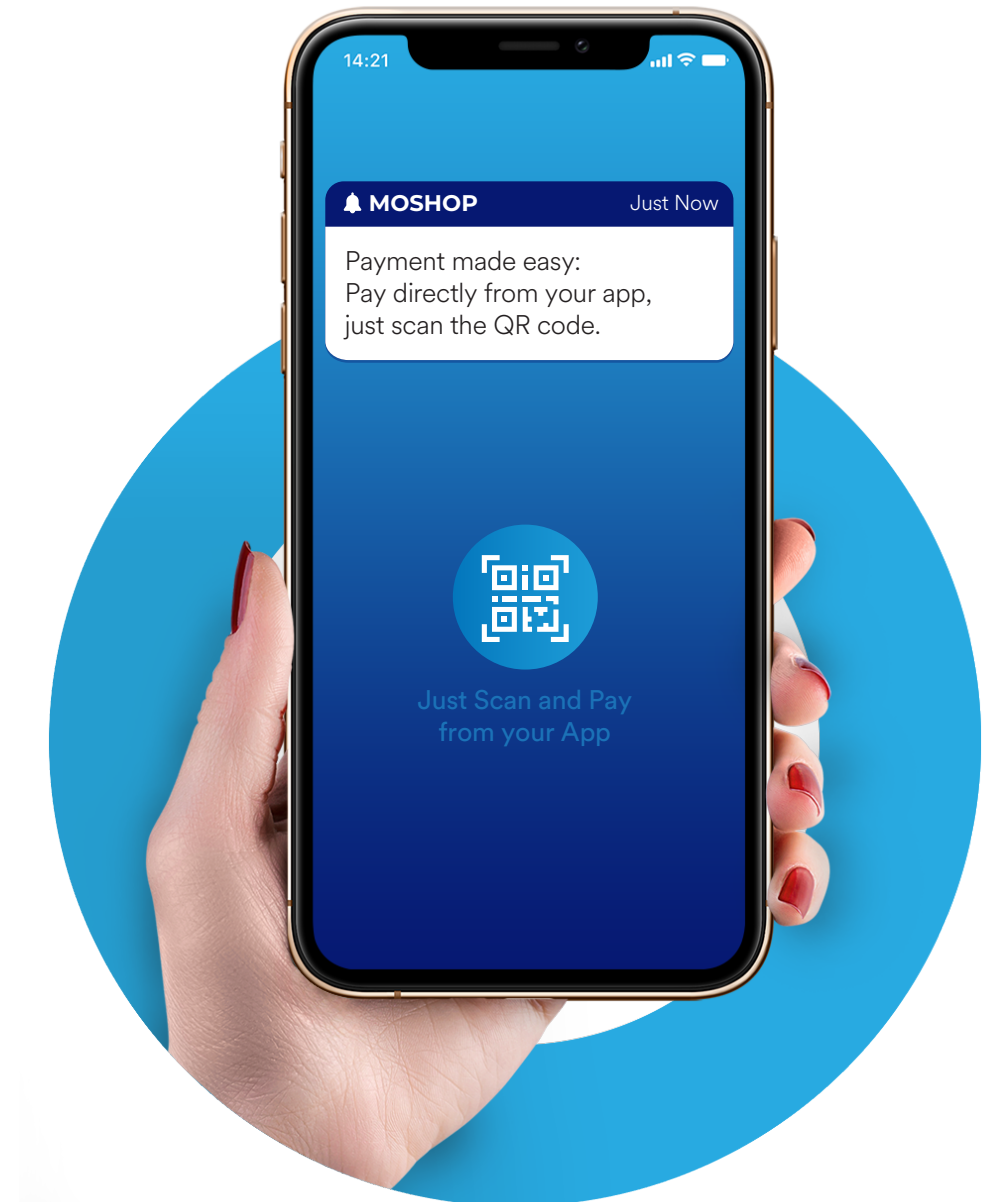


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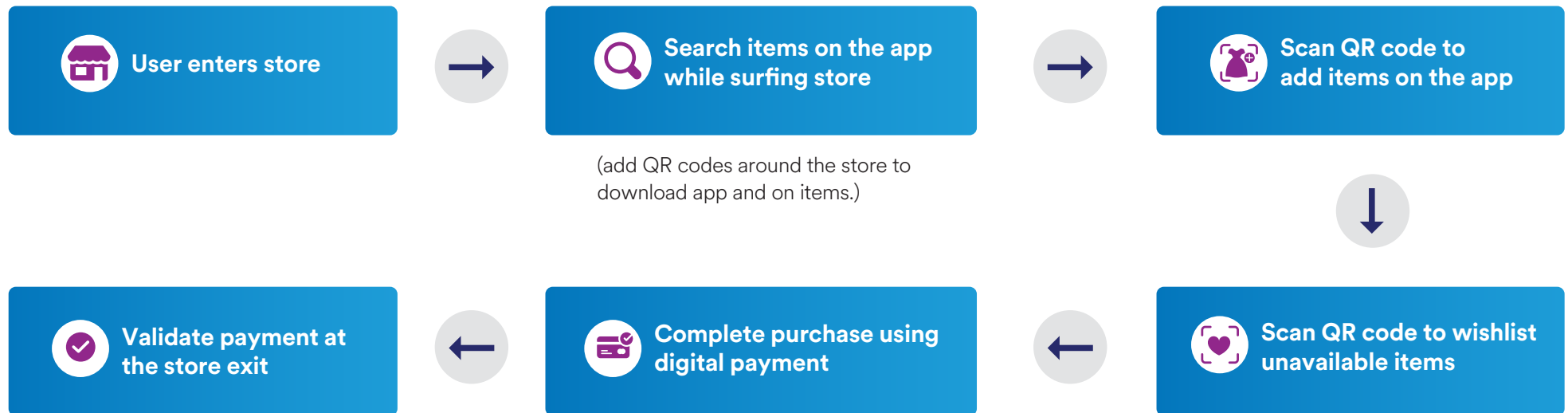
## Payment framework

### a. In-store users looking for ease in shopping experience.

	Campaign rationale	→	Users who are shopping in-store.
	Communication intent	→	Drive users to scan QR code to add products into the cart and proceed directly to make an online payment using the app.
	Channels	→	Push and SMS.
	Trigger periodicity	→	1 minute, 5 minutes, 10 minutes and 30 minutes.
	Primary conversion goal	→	Payment completed through app while in-store.
	Secondary conversion goal	→	Added products to wishlist using QR code.
	MoEngage features implemented	→	Deliver discount coupons as soon as your users enter a store with <a href="#">Geofencing</a> .



## Payment workflow



- Easy-to-use campaign frameworks and workflows with examples

## Campaign 5: Customers' pulse workflow

[Feedback campaign using push and web push channels]

### Specification:

For brands that want to improve their overall experience (in-store, in-app, website and social channels) by utilizing a feedback form.

### Focus:

To drive users to provide feedback on their experience across channels.

### User types:

- Active users who made one or more purchases.
- Abandoned users who dropped off in the middle of a purchase.

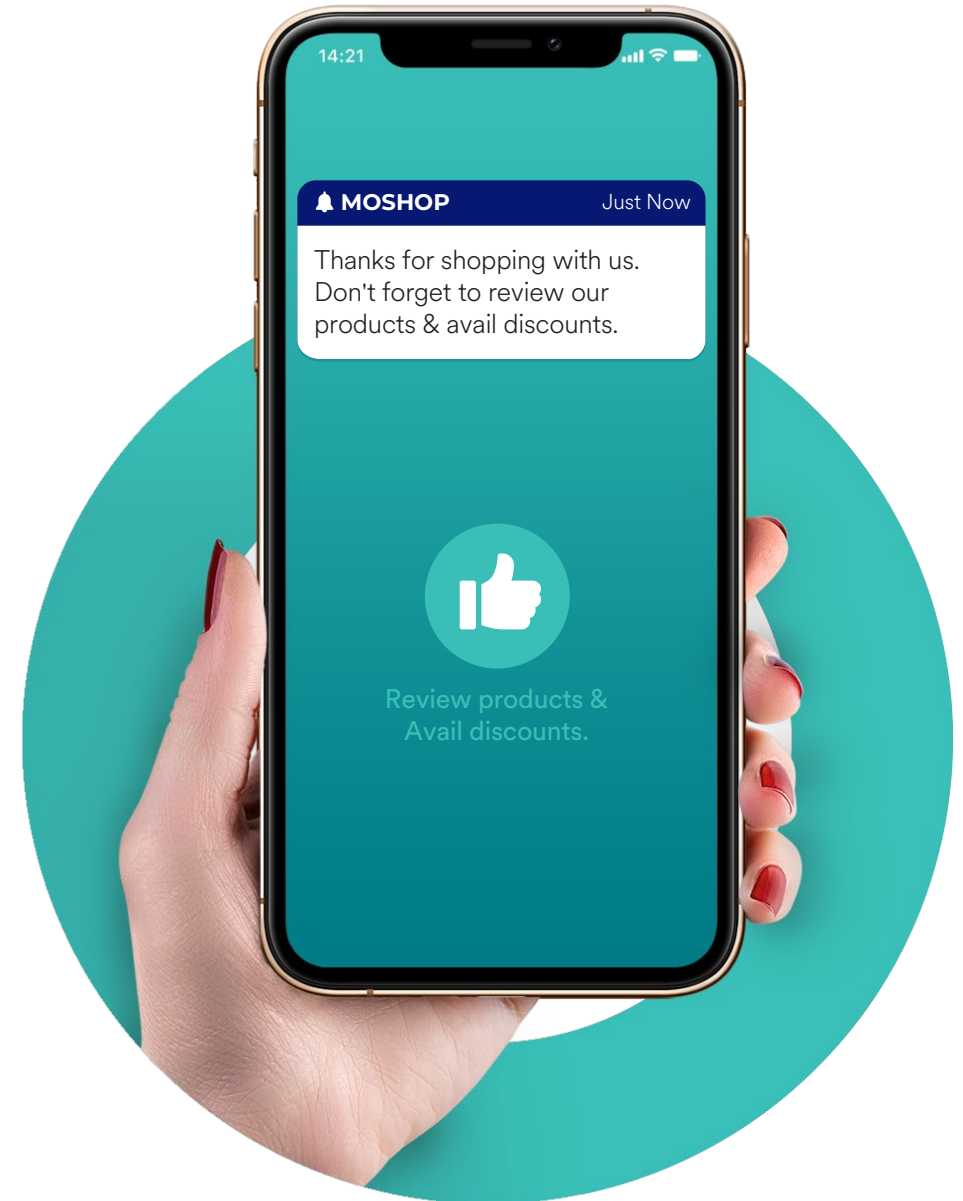
Back to all Campaigns



## Customer pulse framework








### a. Active users who made one or more purchases.

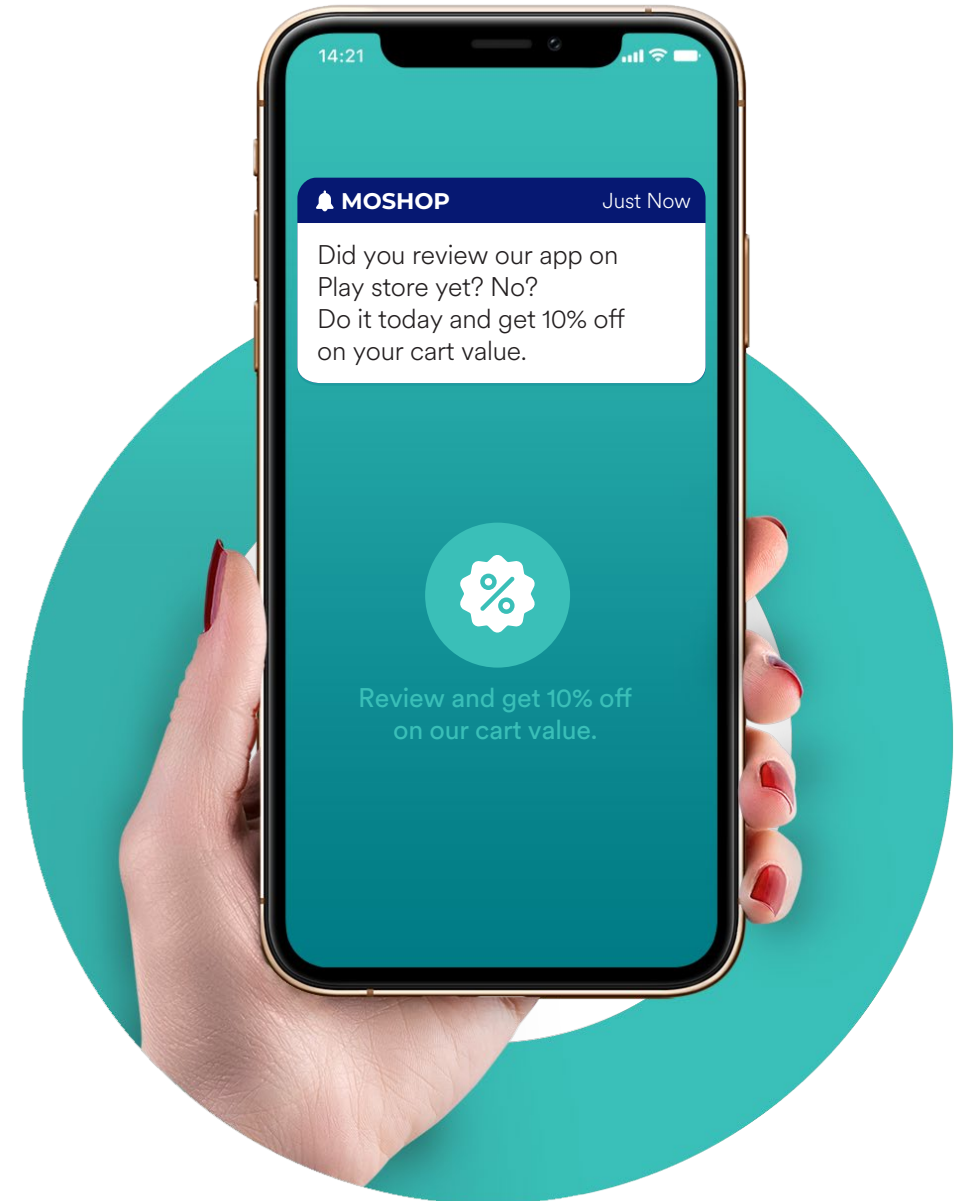
	Workflow entry condition	→	Users who have made at least one purchase.
	Communication intent	→	Encourage users to provide feedback on their app/website experience, purchase funnel and overall product inventory.
	Channels	→	Push, email and web push.
	Trigger periodicity	→	5 days.
	Primary conversion goal	→	Feedback form submitted.
	Secondary conversion goal	→	Google Play store and iOS App store review.
	MoEngage features implemented	→	Encourage your most loyal users to become brand advocates with triggered <a href="#">web push</a> notifications.



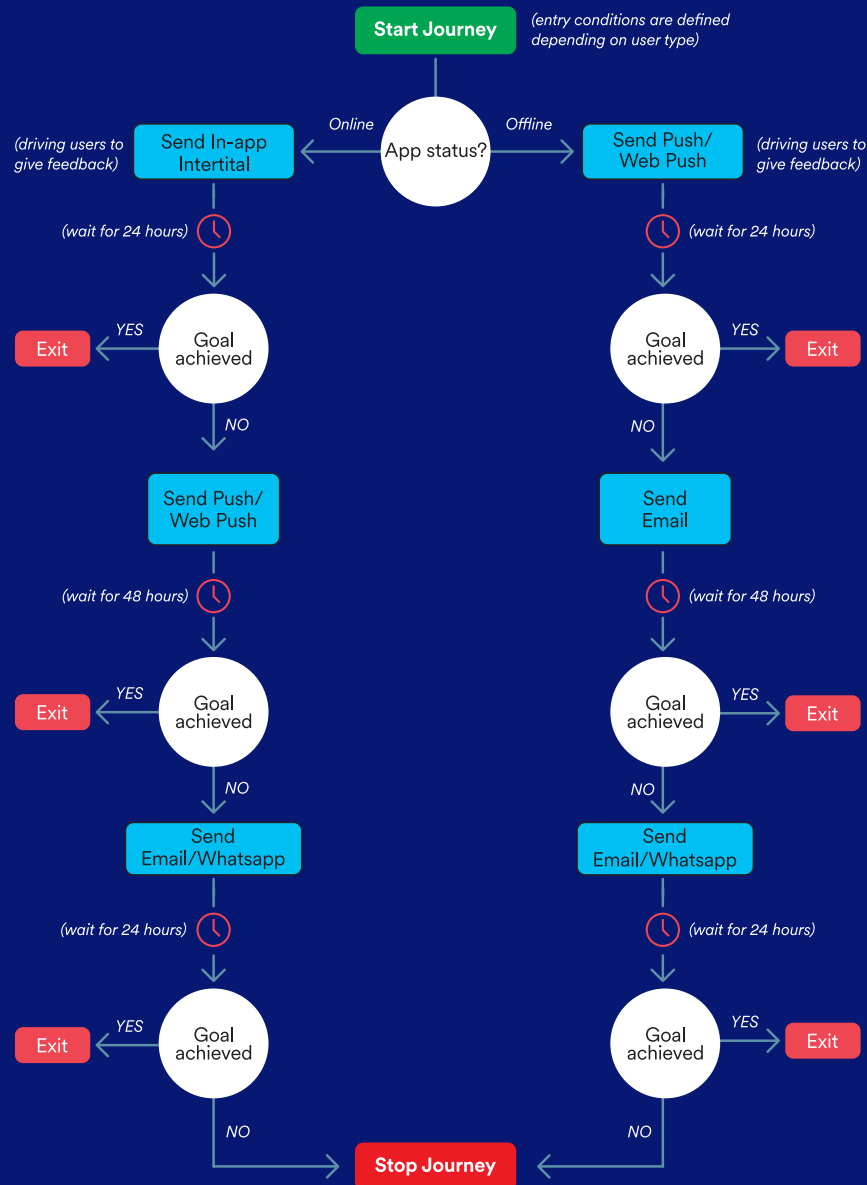
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## b. Abandoned users who dropped off in the middle of a purchase.

	Workflow entry condition	→	Users who abandoned their cart.
	Communication intent	→	Encourage users to provide feedback on purchase funnel, reason for dropping off and overall app/website experience.
	Channels	→	Push, email and web push.
	Trigger periodicity	→	5 days.
	Primary conversion goal	→	Feedback form submitted.
	Secondary conversion goal	→	Bring users back to the website/app.
	MoEngage features implemented	→	Turn cart abandonments around with a timely <a href="#">email</a> .



# Customer pulse workflow



“Knowing your customer is the best way to have a great journey with them. One of the best ways to do this is to analyze their behavior across channels - app and website is a must. Also important is to understand conversion/drop-off with the help of user paths to get more insights. Once you know the gaps, you can easily personalize engagement. We utilize MoEngage platform to do this, which is helping us to increase our mobile app engagement. The platform simplifies many complications, enabling us to achieve our goal. We are able to improve our app's performance in the most effective way.”

**Linda Valentin**  
General Marketing, Alfamart

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## Campaign 6: Hygiene workflow

[Using website and app channels]

### Specification:

For brands that want to clean up and refine their website and app to enhance digital experience.

### Focus:

To remove friction and broken pages from the website and app.

### User types:

- In-app pages (product and category pages).
- Website pages (inner pages and product pages).

◀◀ Back to all Campaigns









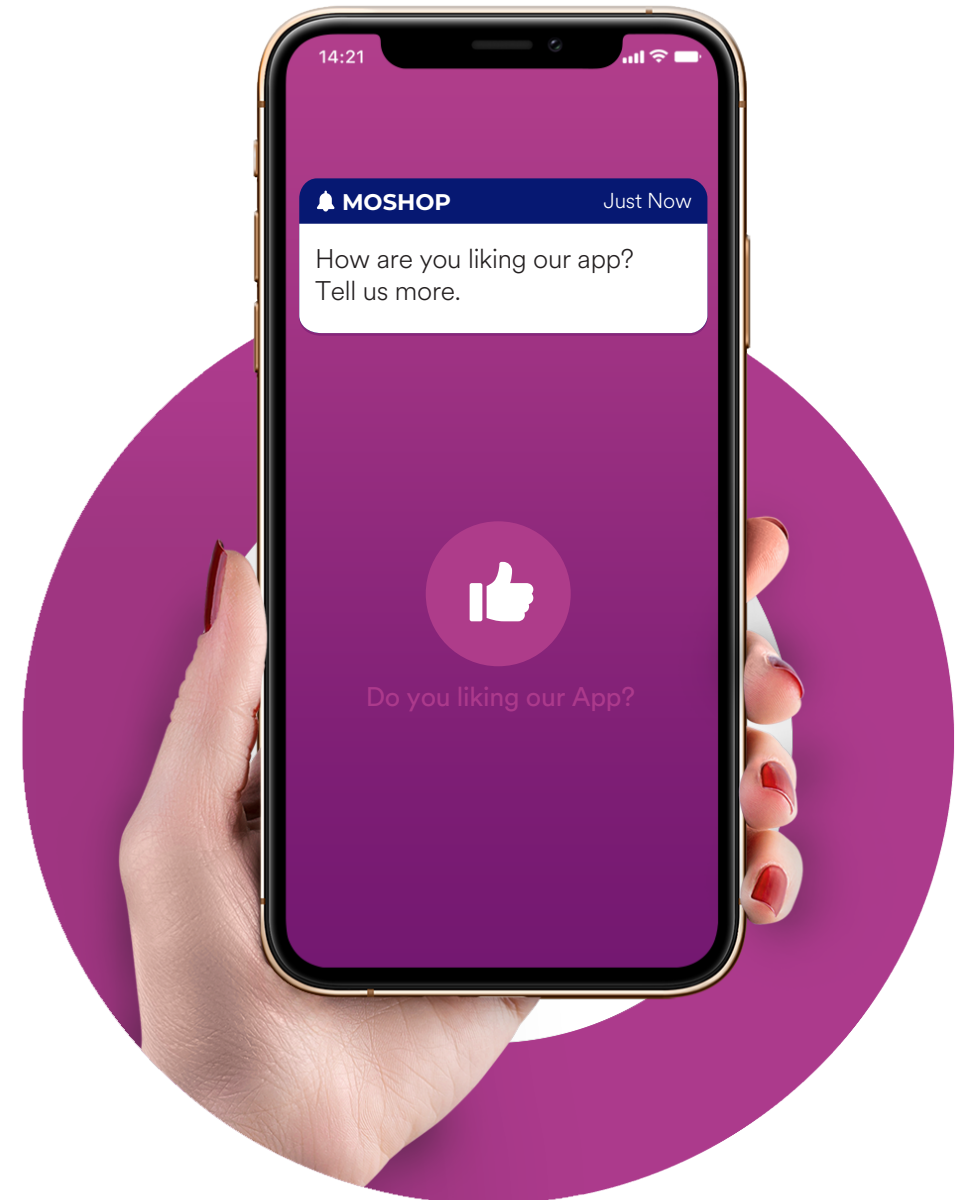


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## Hygiene framework






### a. In-app pages (product and category pages).

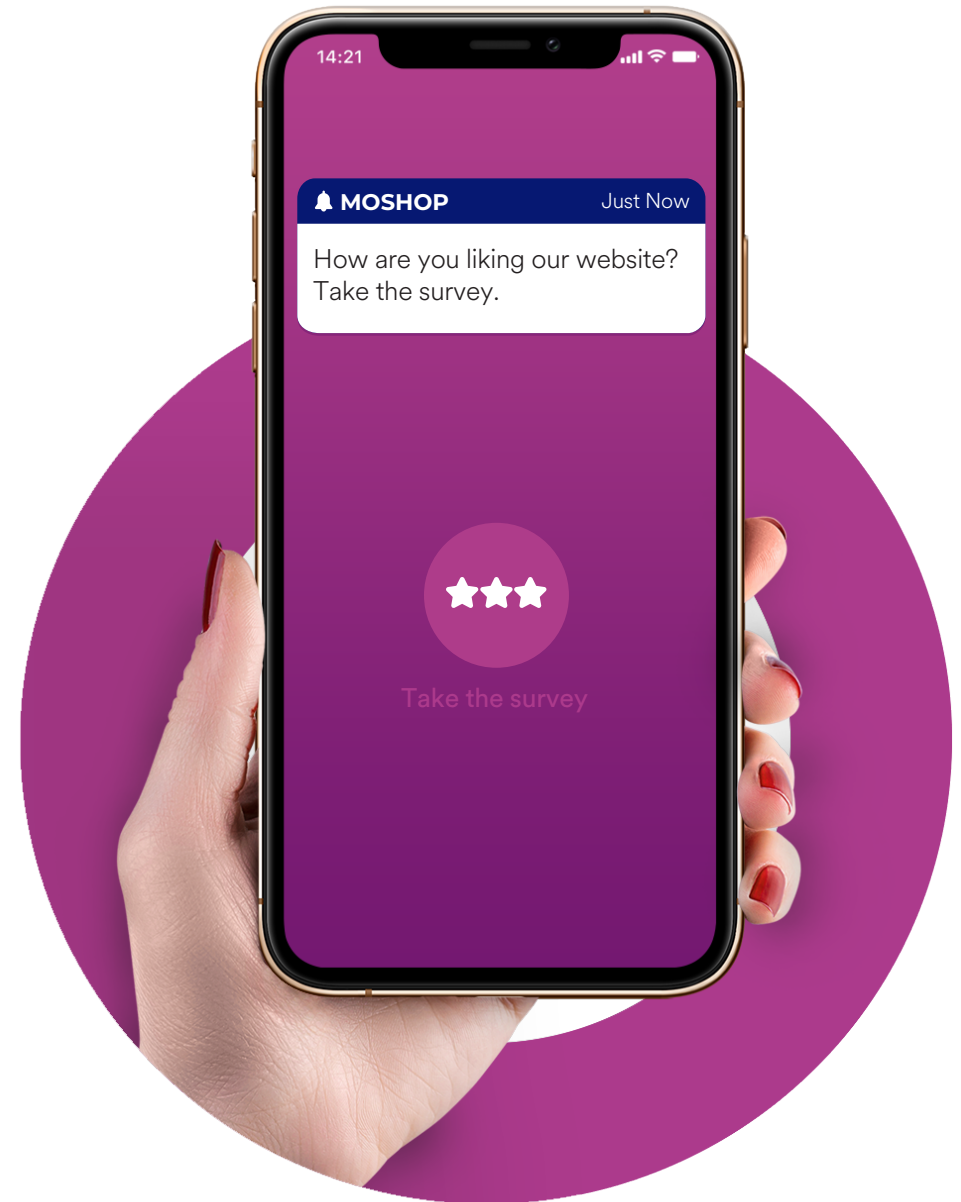
	Campaign rationale	→	Enhance app experience by removing friction and broken pages. Fix app bottlenecks.
	Channels	→	App (in-app).
	Checks	→	Remove funnel leaks. Optimize app load time. Fix broken pages (product and category). Optimize app experience using simple UI/UX.
	Primary conversion goal	→	Enhance app experience.
	Secondary conversion goal	→	Eradicate unwanted drop-offs due to poor experience.
	MoEngage features implemented	→	Understand the user journey taken by your customers with <a href="#">User Path Analysis</a> .



○ Easy-to-use campaign frameworks and workflows with examples

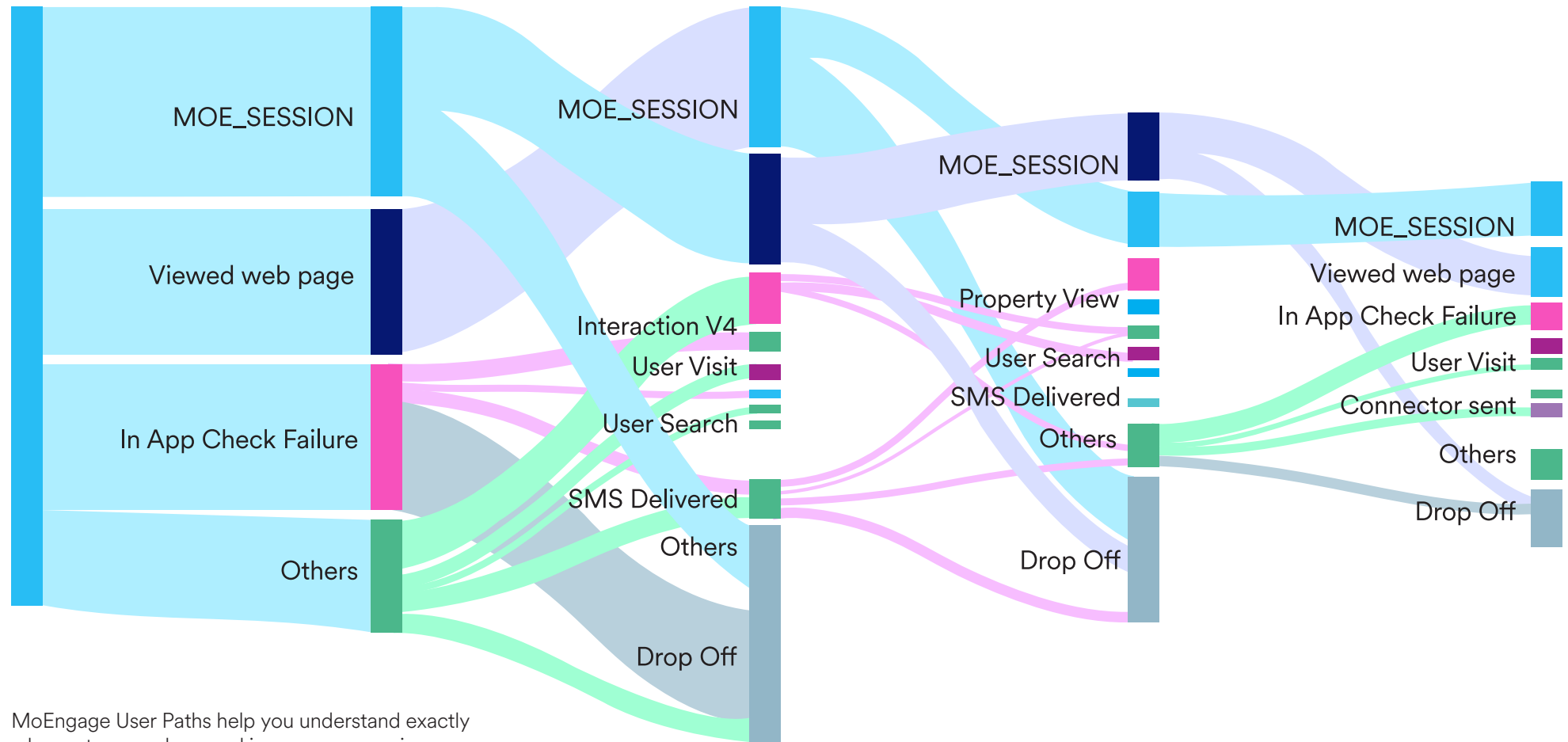
## b. Website pages (inner pages and product pages).

	Campaign rationale	→	Enhance website experience by removing friction and broken pages. Fix website bottlenecks.
	Channels	→	Website
	Checks	→	Remove funnel leaks. Enhance website load time. Optimize slow-loading pages. Fix broken pages (product and category). Remove/redirect 404/error pages.
	Primary conversion goal	→	Enhance website experience.
	Secondary conversion goal	→	Eradicate unwanted drop-offs due to poor experience.
	MoEngage features implemented	→	Isolate user journey bottlenecks and drop-offs with <a href="#">User Path Analysis</a> .



## Hygiene workflow

App/Site opened



MoEngage User Paths help you understand exactly why customers churn and improve conversion

## Things to remember



Now that you have learned how to create workflows for the different stages that your customers might be in, it's time to implement. But before you start, here are some important things that you must remember:



### 1. Set KPIs and goals based on workflow rationale

No two customers are alike. If one is in the onboarding stage, another could be in the retention stage. Hence, you need to set different Key Performance Indicators (KPIs) and goals for each workflow. For example, your goal for onboarding customers could be to increase first-purchase transactions. On the other hand, your goal in the engagement phase could be to nudge customers to purchase again. The goal for the customer advocacy workflow could be to collect more feedback from customers. Based on the intent of your workflow, create SMART goals. Also, ensure that the KPIs are aligned with your business goals and are measurable. Some examples of KPIs that you can set include number of first-time transactions, in-app purchases, customer churn within 30-60-90 days etc. By setting KPIs and goals, you can plan your workflows better.

## ○ Things to remember



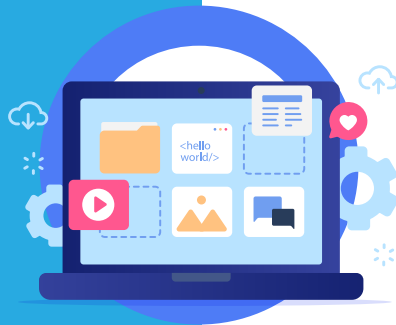
### 2. Run A/B tests

Not sure what messaging or offer would work best for your customer? Run an A/B test. With A/B testing, you can test different content, timing and channels that would resonate with your customer. To do this, first build parallel messaging paths in your workflows and split your segmented audience for testing. You can then track each group's performance to determine what worked better and accordingly optimize your workflow to achieve your goals. Running A/B tests will save you time and effort on creating multiple automation workflows and [remove all guesswork](#) from your marketing campaign.



### 3. Delegate to team members

Although the marketing workflows automate processes, you will have to delegate some functions to team members to improve the campaign's outcome. For example, you can assign different team members to monitor different campaigns and give you actionable insights on how to improve goal achievement. Delegating tasks will increase accountability and transparency within the team. When team members know exactly what they need to focus on, there is less confusion and more clarity about how to achieve the outcome of the campaign.



### 4. Revise workflows with a similar rationale

Remember to review your campaigns periodically – weekly, monthly and quarterly to measure their performance. Sometimes, customer needs may change during the process of implementing the workflow. You can revise your workflows to integrate any new insights that you might have gained that could improve the outcome of your campaigns. You can also do an A/B test to know if a campaign performs well before implementing the workflow completely. However, ensure that the revised workflow does not disrupt the customer experience in any way. It should be hassle-free and frictionless.

## About moengage

MoEngage is an intelligent customer engagement platform, built for the user-obsessed marketer. With AI-powered customer journey orchestration, personalization capabilities, and in-built analytics, MoEngage enables hyper-personalization at scale across mobile, email, web, SMS, and messaging channels. Fortune 500 brands and Enterprises across 35+ countries such as Deutsche Telekom, Samsung, Ally Financial, Vodafone, and McAfee along with internet-first brands such as Flipkart, Ola, OYO, Bigbasket, and Tokopedia use MoEngage to orchestrate efficient customer engagement.

The recent Gartner Magic Quadrant 2020 named MoEngage as the Leader under Mobile Marketing Platforms. Also, MoEngage has been identified as a Strong Performer in Forrester Wave Mobile Engagement Automation 2020 report.

[Read More About MoEngage's Analytics](#) ▶ [Here](#)



## What To Read Next:

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**HOW-TO GUIDE**  
Connected Retail Marketing - Moving Users from In-store to **In-app Purchase**



**1. How-to Guide**  
Connected Retail Marketing - Moving Users from In-store to In-app Purchases

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**Push Notification Delivery Prediction Framework**

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**2. Boost User Engagement by Maximizing Push Notification Delivery Rates**

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**DEFINITIVE BUYER'S GUIDE TO CUSTOMER ENGAGEMENT PLATFORM**  
VOLUME 1



**3. Definitive Buyer's Guide to Customer Engagement Platform**

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We hope you found this eBook interesting, knowledgeable and actionable. If you feel that you've learned something of value, don't forget to share it with everyone who might find it helpful.

For any questions related to the e-book, please reach out to

[content@moengage.com](mailto:content@moengage.com)