

HUMANITY IN ACTION

What Customer Engagement Is, Why It Matters,
And What You Need to Know

braze

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Introduction to Modern Customer Engagement

Humans are complicated. Customer engagement shouldn't be. We understand just how difficult the struggle for customers' attention can be. According to a Harvard Business School (HBS) paper on the economics of customer attention span, **marketing acquisition costs have skyrocketed by as much as 900% over the last 20 years**. And how have brands responded to these diminishing returns? Often by throwing more money at advertising and promotions in an effort to gain additional customers. This isn't efficient or sustainable...and it isn't the only option.

For long-term customer engagement success, you have to look beyond the science of numbers. Numbers drive marketing: They dictate budgets, suggest approaches, and help us identify success. But successful brand outreach to customers requires as much the art of empathy as the science of ROI. There has to be an element of real, human connection with the people who are your customers. Something that lets them know you aren't just a faceless company trying to pry open their wallets—that you are aware of their concerns and needs, and are actively working to engage with them on a personal level.

We call that something “brand humanity,” and it isn't just a philosophy or a pie-in-the-sky ideal—it's a proven strategy for long-term customer engagement success.

Put simply, the more human your interactions with your customers feel to them, the more successful those interactions will be. It turns out that customers care about efforts to personalize messaging and respond to specific concerns. They are more likely to interact with your brand if they perceive it to be helpful, friendly, and considerate. They appreciate being spoken to in a way that feels natural.

At Braze, we are focused every day on helping brands achieve results by improving their communication and better engaging their customers. We know what kinds of messages resonate and which are likely to fall flat, and we have some pretty compelling data from our own systems to back up the powerful idea of brand humanity. Like how conversational, **cross-channel messaging can increase engagement by up to 9x**.

But to prove this to ourselves and our customers, we decided to test the importance of brand humanity objectively. So we formed a hypothesis: Brands that communicate with customers in a way that feels human will achieve higher customer affinity and engagement that will lead to improved business results. Then we commissioned Forrester Consulting to conduct a study to interrogate this hypothesis—a study we call the Braze Brand Humanity Index. In this study, we asked 3,000+ consumers around the world to tell us about their recent experience with a brand—and whether or not the interaction felt human. As part of the exercise, participants detailed what qualities (called emotional attributes in the study) and what types of actions (functional attributes) made these interactions feel human.

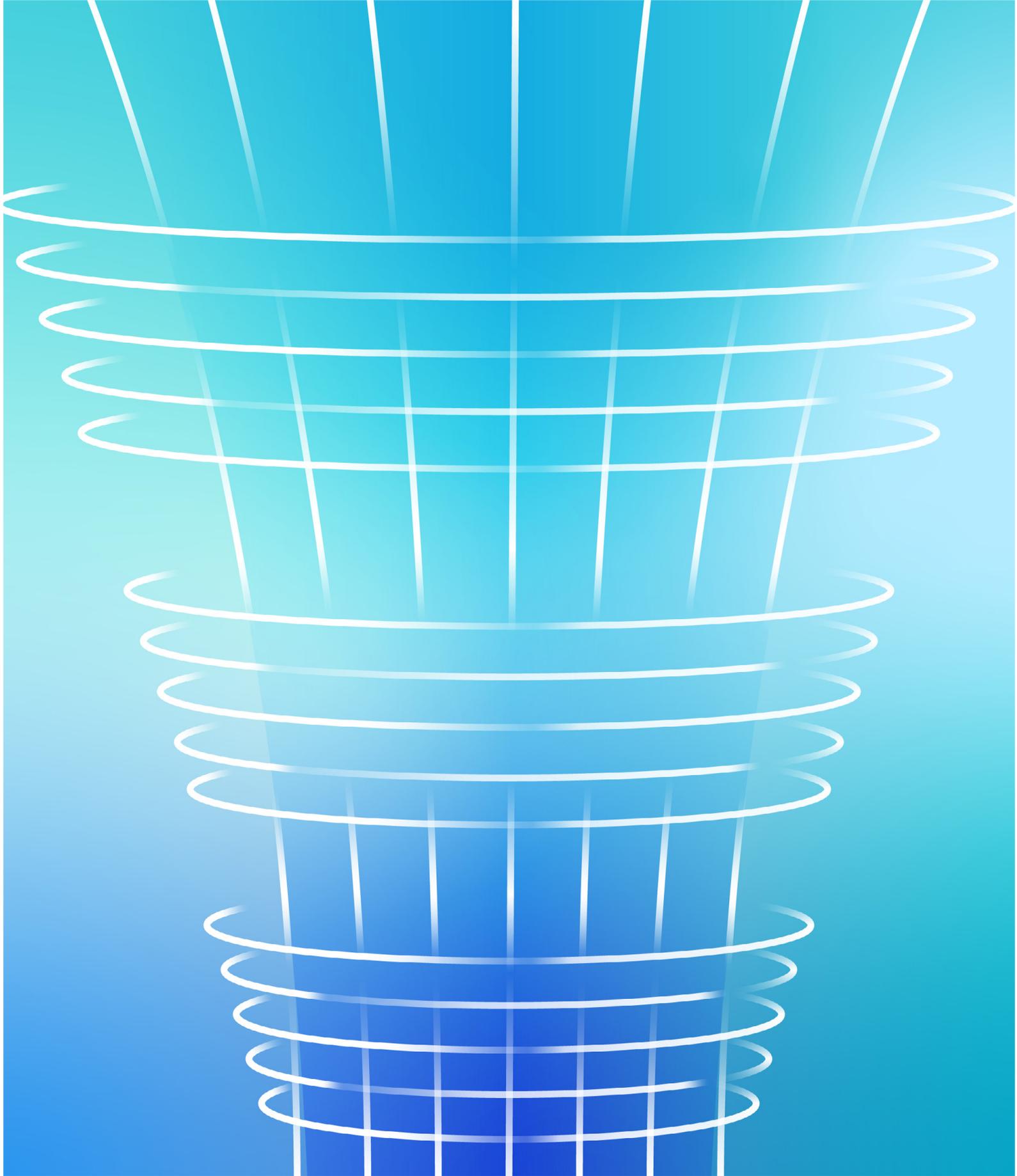
The results affirmed what our experiences told us: Consumers respond better when brands display human qualities. But the devil's in the details. There seems to be a perception among brand marketers, for example, that companies need to be “quirky,” “fun,” or “amusing” to resonate with customers—maybe because that kind of marketing is more fun to produce. But it isn't borne out by the research: In fact, these attributes were among the weakest predictors of customer engagement in the study.

In this eBook, we'll introduce you to brand humanity and the best practices for long-term customer engagement across multiple touchpoints. We'll encourage you to listen closely to your customers, and strive to understand their personal context before taking action. We'll demonstrate what works and what doesn't at every stage in the marketing funnel, backed up by statistics and specific brand initiatives. We'll show you how to test your brand's performance and monitor the key performance indicators that matter. And we'll show how your brand can provide value with every interaction, be welcomed instead of resisted, and build long-term, high-value relationships through more meaningful human connections.

Are you ready? Then let's go!



To help you get the most out of this eBook, we're going to clearly define the basic terms and concepts of modern marketing, so we're all on the same page as we help you optimize your approach. If you feel like you have a firm grasp of the basics, feel free to skip ahead. There's also a glossary of terms at the end, in case you come across an unfamiliar word or concept.



Marketing 101— What You Need To Know

Marketing can be thought of as the process of acquiring new customers through targeted outreach and then engaging and retaining them over the long term. There are a lot of ways to make that happen, and the specifics can differ from industry to industry or even brand to brand. But as a general observation, far too many companies spend the bulk of their time, money, and effort on the first step (acquisition), and end up neglecting the second (engagement and retention). It's expensive to keep acquiring first-time customers—it's much more efficient to keep the ones you've already won over and encourage them to make additional purchases.

To keep customers engaged over a long period of time, brands can take advantage of technology to build strong, sustainable relationships with each customer right from the start. Then, marketers can leverage information about those customers and their behavior to sustain and grow those bonds over time. Brands that understand this will focus on genuine two-way relationship building: That is, asking customers what they want, listening to their feedback, and delivering against those expectations.

The Marketing Funnel

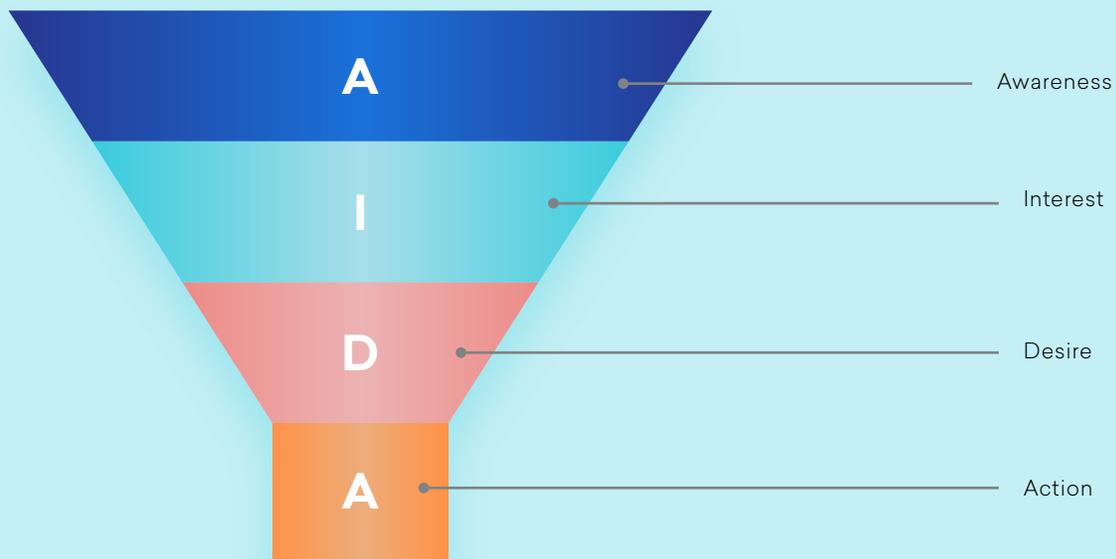
Building productive long-term relationships with your customers is all about understanding their needs and using that understanding to serve them better.

To do that, you need three things:

1. Accurate, real-time customer data that fuels that understanding
2. Technology that allows you to use that data to orchestrate ongoing engagement with customers
3. Internal teams who can work together to make that engagement happen and to assess and optimize your efforts over time

So how do brands use data, technology, and teamwork to build out a best-in-class customer engagement strategy? It's all about customer lifecycle management, a way to characterize the stages of the long-term relationship a brand builds with its customers.

In 1898, an early advertising pioneer named [E. St. Elmo Lewis](#) set down a concept that forever changed how brands thought of their relationship to customers. His “AIDA” model—popularly depicted as a funnel, or upside-down pyramid—gave brands a way to chart their customer’s progression toward a purchase (or other conversion) across four distinct stages:



The top of the funnel is the early stage of a consumer relationship, when a potential customer first becomes aware of the brand. There are typically many more people here than at the bottom, because not every potential customer who becomes aware of, say, Johnson's Widgets will be interested in learning more; even fewer will ultimately decide they want to purchase them, and fewer still will actually make that purchase. Many of today’s brands still use this funnel in thinking about the process of obtaining

customers, leading to a multiphase approach where they first seek to reach a wide potential audience, then guide the curious on through the funnel.

The AIDA model has evolved over the years, and for the purposes of this eBook we will refer to today's four key stages using the following terms: acquisition, engagement, retention, and loyalty/evangelism. Your marketing team's specific objectives may focus on growth at one, some, or all stages of the funnel.

The main difference between now and St. Elmo's heyday is that today's marketers, armed with data and technology, can focus on growing audiences with much more precision and efficiency. Thanks to modern tools for tracking and targeting, and an ever-expanding array of channels to reach audiences, building a successful funnel can be done much more efficiently and with a lot less guesswork than ever before.

6 Rules for Maintaining the Marketing Funnel

It's expected that the number of people who become aware of your brand will end up being larger than the number who can be persuaded to make a purchase or build a long-term relationship with your company. But small shifts in the flow from one stage of the funnel to the next can affect individual's salaries, the fate of teams, and even a company's overall future.

In this case, one way to see stronger results is by getting more folks flowing from each stage of the funnel to the next. To make that happen, it's smart to look closely at potential ways to increase conversions over time via conversion rate optimization (CRO).

The Fundamentals of CRO

1. Ask questions

Why are people dropping off? What improvements can be made in your efforts to move people through the funnel—from each stage to the next?

- From acquisition to engagement?
- From engagement to retention?
- From retention to loyalty and evangelism?

Don't be afraid to ask questions that might seem basic or self-explanatory; often, if you find yourself wondering about something, there's a reason.

2. Set up reports to monitor your efforts

Finding answers to the questions you come up with in step one requires having data in place to track and analyze. Some experts claiming to offer CRO strategies skip steps one and two and dive straight into specific tactics. But tactics are only useful if you can measure their impact. For starters, you need to understand your baseline—where you are currently, what's working, and what's not.

3. Create hypotheses and test them

Maybe you have a hunch that Facebook is generating higher quality leads for your business than other paid social channels and that changing your acquisition strategy may help more people move through the funnel to engagement. By asking questions in step one and having the reporting in place thanks to step two, you can now formalize your hypothesis and—for instance—assess the impact of Facebook versus Twitter and other paid social ads on overall retention rates.

4. Measure the results

Does shifting ad spend from Twitter to Facebook make a difference? Measuring the results at each funnel step is critical. Doing so could reveal that leads are transitioning from the acquisition to engagement phase at higher rates—but are they eventually churning at similar rates or are increasing numbers transitioning to loyal evangelists? The answer could have a big impact on the overall success of your marketing program.

5. Keep iterating at every step

Nothing in marketing is static. What is true right now may not be true next month or even next week. While it's important to think big picture, continuing to look at things at each step can help identify issues that may otherwise be overlooked.

6. Stop optimizing the bad

It can be tempting to skip some of these steps and jump into fixing mode before it's really clear what's broken. Even those with the best of intentions can get caught up. But it's a trap: To succeed over the long haul, you have to build on a strong foundation. Make sure you're being clear-eyed about what's working and what isn't. No company ever succeeded by doing the wrong thing better.

Marketing Key Performance Indicators (KPIs)

To track the success of your marketing efforts throughout your sales funnel, you'll want to keep track of key performance indicators, or KPIs. These easily calculated success metrics can help you understand your data at a glance so you can focus on the most important challenges first. Here are the KPIs you need to know (and how to calculate them).

Cost Per Acquisition (CPA)

To measure the CPA of a given campaign, total your costs for that campaign and divide by the conversions or acquisitions the campaign produced.

CPA = $\frac{\text{costs}}{\# \text{ of acquisitions or conversions you're tracking}}$

Example: If you spent \$25,000 on a Facebook campaign and acquired 50,000 new followers, the cost per acquisition was \$.50 ($\$25,000 \div 50,000$).

Customer Acquisition Costs (CAC)

While CPA looks at the tactical cost per acquired user (account sign-up, trial registration, email capture, etc.), CAC looks at the cost further down the funnel, or the cost of acquiring customers beyond a particular campaign.

CAC = $\frac{\text{total marketing and sales costs for a given time period}}{\# \text{ of new customers acquired during this time period}}$

Example: If those 50,000 new Facebook likes in the previous example led 1,200 new customers to make widget purchases, then the customer acquisition cost is $\$25,000 \div 1200 = \20.83 . Now you know it costs you \$20.83 to acquire a paying customer through Facebook outreach.

Lifetime Value (LTV) (Projected)

Lifetime value formulas help assess whether you're paying too much for—or getting a good deal on—your customers, given the value they bring to your company over the entire time they're a customer, which can be many years. If a customer's LTV isn't greater than the CPA it cost you to acquire them, you're in trouble.

Projected LTV = average value of a conversion × average # of conversions in a time frame × average customer lifetime

Example: If your average in-app purchase is \$10, and the average user makes 5 purchases a year, and the average customer stays with your company for 10 years, then your customers on average have a \$500 LTV ($\$10 \times 5 \times 10$).

Current LTV or Average Revenue Per User (ARPU)

You can also calculate the current LTV (the value up to this point in time, ignoring the future value of current customers) by simply dividing the total revenue of your product or service by the number of customers. This is also known as ARPU, or average revenue per user.

Average Revenue Per User (ARPU) or Current LTV = lifetime revenue of your product or service ÷ # of lifetime customers

Example: If your app has made \$2,000 from in-app purchases since launch and you've had 1,000 users in total, then you have a current LTV of \$2 per user, also known as a \$2 ARPU ($\$2000 \div 1000$).

Return on Investment (ROI)

This broad measurement estimates the value of an initiative relative to its cost, and can be an important business driver. To accurately measure ROI, it's important to capture the total costs of the investment (which can include hard-to-measure things like the value of executive time spent on the project) as well as the full value delivered by it. Make sure you align on a particular measure of return to focus on (e.g., revenue, gross profit, or net profit).

$$\text{ROI} = (\text{gain from investment} - \text{cost of investment}) \div \text{cost of investment}$$

Example: If a promotional email campaign cost \$20,000 to design, \$40,000 to send, and has \$20,000 in additional costs but raised \$100,000 in new revenue from new orders placed, the return would be .25, or a 25% return on that \$80,000 investment $(\$100,000 - \$80,000) \div \$80,000$.

Data Collection

Data is the building block of successful customer relationship management. Three kinds of data you should be compiling:

1. Demographics and personal information

Also known as attributes, they can be collected when a customer first creates an account, or can be sourced from click-to-install advertising campaigns (such as ones targeting certain age groups or locations). They can include Gender, Location, Age, Email Address, Device Type, Operating System, Lifetime Revenue, Number of Rewards Points, and Email Subscriber Status.

2. Interests

Depending on your company, you may ask your customers questions via a preference center or other feedback loop to gather intel about which content topics they care about or which products or services they're interested in. They can include items like Favorites (brands, shows, etc.), Preference Center Selections, Preferred Send Day or Time, and Preferred Messaging Channel.

3. Behaviors/events

Behavioral data means user engagement metrics for your apps, websites, and email lists. They can include items like Sessions, Last Used App or Site, First Used App or Site, Completed Registration, Last Item Purchased, Last Article Read, and Push Opt-In Status.

Data Management Technologies

These are tools that help you store, manage, and understand your data.

1. Application Programming Interfaces (APIs)

Think of APIs as a sort of catalog that lays out a selection of pre-determined operations and actions that can be carried out within a given system (for instance, a customer engagement platform or a loyalty solution). Because APIs make it possible to leverage other technologies' implementations, they can reduce the engineering support needed to carry out actions across multiple systems and support more consistent experiences for your customers. Here are some of the ways APIs support your data management needs and empower better customer experiences.



They can...

- **Help store and manage information at scale.** APIs process immense numbers of requests with speed, security, and proper functionality. This is key, since the amount of customer data any one business gathers, and the number of systems that depend on that data, typically continues to grow.
- **Power dynamic content.** Dynamic content is added to messages responsively: When a customer opens a push notification or reads an email, instead of canned messaging about your company's offerings you can share up-to-the-minute info about given products or services based on data drawn directly and automatically from an internal or

public API. You've probably seen this in action, like getting updates that reflect your own local weather or recommendations based on your recent browsing or shopping history.

- **Trigger behavior-based email, push notifications, and other messages.** If you use an API, you can send messaging based on information from one system (like customers' in-store purchases, or behavioral data tracked by your proprietary systems) via another system, such as a customer engagement platform, allowing for segmentation and customization.

APIs work with digital keys, which are unique codes, and if you only create one key and give it away to multiple employees, it can lead to security concerns—for example if a departing employee still has access to the key. Best practices call for creating multiple API keys with differing levels of permissions, giving team members only the level of access they need to do their work, and taking care to delete keys no longer in active use. But smart brands don't stop there. API keys were originally created for identification purposes, not to ensure security, so taking advantage of public key encryption or security measures is a must-do for companies that are serious about securing their APIs.

2. Webhooks

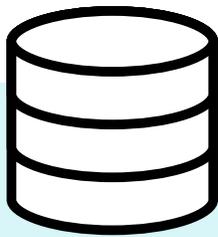
Think of webhooks as a tool built to support responsiveness when communicating between systems. While APIs carry out actions when instructed to, webhooks are designed to communicate with URLs associated with APIs and backend panels when an event occurs—triggering a relevant action or update in other systems in a timely manner. (For instance, you could use a webhook to your loyalty solution to trigger an update in a customers' loyal point balance when they book a hotel room in your app.) Here are some ways webhooks can support data management goals and customer engagement strategies.

Webhooks...

- **Enable powerful, event-based, real-time marketing automation**
With webhooks, marketers can set up and trigger event-based campaigns and updates as soon as actions take place. Marketers can use even non-app or non-website events to drive and influence their customers' brand experiences—as long as there's a specific action or behavior and a designated service or result set up. An example is sending discounts or credits to a user when they carry out particular actions.
- **Build connections**, especially where API integrations aren't workable or are too expensive.
- **Support customer outreach** via third-party communication platforms, like SMS and messaging apps like Facebook Messenger, Line, or Kik.
- **Require no engineering**, no pulling of lists, no tagging of additional information—just an initial setup of a webhook between the systems involved, enabling great customer experiences without draining internal resources.
- **Synchronize your systems** in terms of interpreting user actions across platforms. For instance, if someone unsubscribes from your emails, a webhook setup can let your other systems know, so it can update that user file accordingly.
- **Connect online and offline.** For companies with a big digital and real-world footprint, it can be hard to keep these two worlds aligned. Webhooks can connect digital information to automatically update the digital portion of offline activities, making it possible, for example, to automate the sending of targeted, segmented postcards via direct-mail services.
- **Operate in real-time.** Unlike APIs, which require an initial request or pull information from a database to function, webhooks can trigger action automatically whenever data or information updates.

3. Software Development Kits (SDKs)

A software development kit is a set of assets that make programmers' jobs a little easier. You can think of an SDK as a box of cake mix: It provides the basic ingredients you need for a standard cake—or in this case, to build or modify a mobile app—then lets you customize it with your own unique ingredients. For instance, if you're a hotel chain that wants to provide the local weather at each of your properties, you might utilize a weather SDK so programmers don't have to create that functionality from scratch for each location. Here are some of the main ways SDKs can help enhance your customers' experiences.



SDK



CUSTOM CODE



APPLICATION

SDKs...

- **Speed time to business value** by helping programmers accomplish more in less time.
- **Improve performance for your apps, websites, or other digital platforms** by making improvements possible that would otherwise be difficult or expensive to create in-house.
- **Require development work to integrate**, but are user-friendly and easy to work with.

For a real-life example, consider the Braze mobile SDK. This toolkit for programmers includes code examples, technical documentation, and packages that our customers' developers can use to customize their applications so they'll support tracking real-time user engagement data, and enable marketers using our platform to act on that data from

within the Braze dashboard. With the SDK in place, our customers can create audience segments and deliver timely, personalized customer outreach. Without an SDK, every Braze client would have to create all the infrastructure and tools for data processing, segmentation logic, delivery options, anonymous user handling, campaign analytics, and a lot more from scratch.

4. Data Export Streaming Tools

Most so-called “real-time data” isn't exactly that—it's data pulled recently, which was accurate as of a certain moment in time that's already passed. But data export streaming tools use unbounded data, truly real-time data that never stops updating. It's like the difference between a long-distance bus that waits for all the passengers (in this case, data) before leaving, versus a taxi stand where each car leaves based on the arrival of a new customer—that's unbounded or streaming data.

Recency of data is a critical element of the seamless customer experience, and the difference can matter in the context of a customer journey. Have you ever received a notice that an item in your cart just went on sale, for example, even though you made the purchase the day before? That's a pretty good sign that brand is using a batch-processing system instead of data export streaming tools.

Testing

Part of the magic of digital customer engagement is that it offers ample opportunities for testing hypotheses that can lead to incremental improvement. Comparing creative variants, different send times, alternate messaging, etc., provides insights and context about how your campaigns and variants affect user behavior. The process offers intel you can use to limit under- and over-messaging, to know which campaigns are moving the needle and should be continued or expanded, and to deliver experiences customers are more likely to engage with.

The two simplest types of testing you'll encounter are A/B and Multivariate testing. Here's what they're all about.

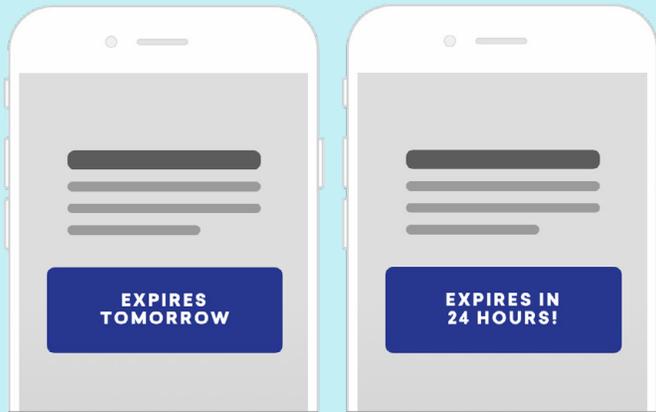
A/B Testing

A/B Testing

Test One Variable

What is A/B testing?

A/B testing is essentially trying two different approaches to the same campaign, often with slight variations (such as a different subject line, emojis rather than plain text, or different images) and whichever variant performs better in the test is used in the actual campaign. For example, a company might send an email out to 5% of its mailing list, with everyone receiving one of two different subject lines; whichever subject line led to a higher open rate in the test group becomes the subject line used for the remaining 95% of the list.

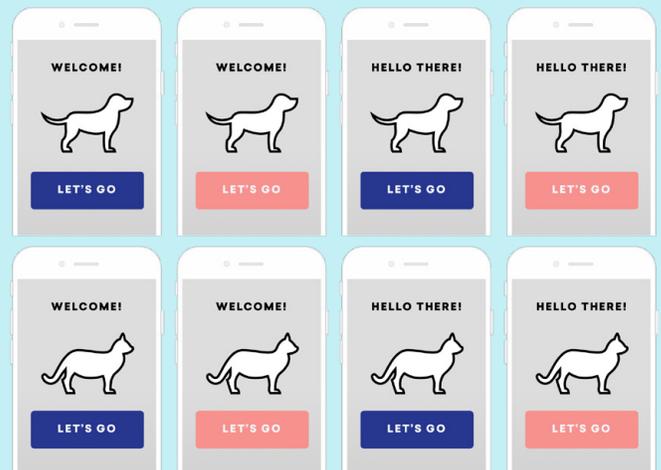


Multivariate Testing

Test Multiple Variables

What is Multivariate testing?

If A/B testing lets you see the effect of changing one element of your campaign, multivariate testing adds complexity by letting you test combinations of variables at once. Now an email might have two different subject lines, and two different send times (morning and mid-afternoon), and two different email headlines, for a total of 8 variations that can all be tested, quickly and automatically, with the winning combination used in the actual campaign.



- Create and execute quickly
- Deliver clear results that are easy for teams to immediately interpret and act upon
- Achieve statistical significance at a smaller sample size (relative to a multivariate test which requires more inputs)

Multivariate Testing

- Test more theories at the same time
- See the interaction between multiple variables within a campaign
- Get a more detailed picture about how various campaign elements impact performance

Data Privacy and Security

Privacy and security are critical issues when it comes to customer behavior and the data it generates. Rules and approaches can vary widely, and the details and legal consequences of breaking protocol can be daunting in highly regulated industries. Here are some of the key terms and concepts you should be familiar with:

Personally Identifiable Information (PII) / Personal Information / Personal Data

Internationally and in the U.S., there’s not one governing body or set of guidelines responsible defining Personally Identifiable Information, or PII—referred to as “personal information” or “personal data” outside the U.S.—but there are a few key players, noted below. Common examples of PII include Name, Address, Social Security Number, Date of Birth, and Demographic Information.

PII DEFINITION (SOC2)



Name



Address



Social Security Number



Date of Birth



Demographic Information



Health Data

System and Organization Controls (SOC)

The self-regulated System and Organization Controls (SOC) Report 2, created by the American Institute of CPAs (AICPA), offers parameters and advice for service organizations looking to managing customer data in accordance with five key “trust service principles”—availability, confidentiality, privacy, processing integrity, and security.

Health Insurance Portability and Accountability Act (HIPAA) / Protected Health Information (PHI)

For those in the highly regulated U.S. healthcare industry, you’ll need to understand and abide by HIPAA’s definition of PHI (protected health information, the patient’s version of PII) and requirements for compliance. Examples include Address, Social Security Number, Date of Birth, Demographic Information, Healthcare Provider/Medical Records, and Information Stored in Health Insurer’s Databases. According to HIPAA, PHI includes: “Past, present, or potential future physical or mental health information, including treatment and payments for healthcare, as well as any identifying information associated with this health information.” Failing to comply with HIPAA could cost your company up to \$1.5 million in fines. For a more serious offense, like failing to fix a known issue in their company’s systems, responsible individuals could face criminal charges and penalties of up to five years in prison.

EXAMPLES OF PHI (HIPAA)



Address



Social Security Number



Date of Birth



Demographic Information



Healthcare Provider Notes in Patient Medical Records



Medical Records, Lab Reports, Medical Bills



Conversations with Healthcare Providers



Patient Information Collected in Health Insurers’ Databases

General Data Protection Regulation (GDPR)

The E.U.'s General Data Protection Regulation (GDPR) has expanded the rights that so-called "data subjects" (i.e., people) in the European Union have regarding how their personal data is collected and used globally. GDPR spells out personal data as "any information related to a natural person, or Data Subject, that can be used to directly or indirectly identify the person." Examples of personal data covered by GDPR regulations include Name, Medical Information, Email Address, Banking Information, Social Media Posts, Photos, Computer IP Addresses, and Demographic Information. The GDPR compliance process will be different for every organization—depending on how personal data is being used. Failure to comply can cost an enterprise fines of up to 20 million euros or 4% of global revenue, whichever is higher.

While AdTech has enabled businesses looking to engage prospective customers and audiences beyond their owned channels by tapping into ad networks and exchanges, with GDPR that may no longer be a safe choice, because personal data is passed between parties multiple times throughout the process without explicit permissions—a serious no-no under GDPR. An alternative to campaigns that want to leverage third-party data that may or may not be GDPR-compliant is to use MarTech to collect first-party data on prospective and current customers (with explicit permissions) to support acquisition, engagement, retention, and retargeting campaigns on owned and paid channels. That way GDPR and consumers are respected.

PERSONAL DATA DEFINITION (GDPR)



Name



Medical Information



Date of Birth



Banking Information



Social Media Posts



Photo



Computer IP Address



Demographic Information

Customer Segmentation

When dealing with large and potentially diverse audiences, it's more effective and efficient to tactically divide and conquer—a practice known as customer segmentation—instead of engaging with all members of your customer base the same way. It's about compiling focused and specific data, defining subsets of your audience with similar attributes, preferences, or behaviors, who can be efficiently targeted with particular group-level strategies. Here's what you need to know.

What's a segment?

At its core, a segment is a group of users that share something in common. That something could be a particular location (Nebraska) or a particular age (between 18 and 34), or it could be something behavioral, like whether they clicked on the last email you sent. Marketers care about segmentation because it's one of the main ways they have to customize customers' experience to better fit their particular wants and needs. When a brand segments their audience, they're using the data they have at their disposal to identify groupings of users defined by shared factors, behaviors, or interests. By allowing marketing, growth, and engagement teams to specify that a given message should only go to people who live in Nebraska or customers who have made a purchase in the last month and have push notifications enabled, segmentation makes it possible to serve up individually relevant outreach even when you have an audience that numbers in the millions.

What's an example of a segment?

Let's say your company has 50,000 customers. That group can be divided into any number of subgroups, based on your goals, the information you have, and what your systems are capable of storing (or permitted to store, if regulations apply). An example of a useful segment might be “users who downloaded our app in the last month who haven't yet completed their profile,” since knowing that a given individual has failed to take a key step in the customer lifecycle can allow you to target them with messaging that will nudge them to take action.

What makes a segment dynamic?

A dynamic segment is a segment where the people contained within it are updated on an ongoing, real-time basis. Back in the day, marketing campaigns were built around static lists (think phone numbers, mailing addresses, etc.), which could lead to irrelevant, out-of-date outreach. With dynamic segmentation, users move from one segment to another as they take actions, evolve their preferences, or move along in their customer journey, supporting smarter, more effective marketing campaigns. In the example above, if the segment of "users who downloaded our app in the last month but haven't completed their profile" were a dynamic segment, those completing their profile would migrate out of this list automatically, and would not receive a follow-up email reminding them to complete this task.

How does one go about creating a segment?

Your customer engagement platform should allow you to build segments based upon criteria you define. Collecting data points like the ones below will give you options for combining them into useful segments.

- **Attributes:** Gender, Location, Age, Email Address, Device Type, Favorite TV Show, Lifetime Revenue, Number of Rewards Points, Email Subscriber
- **Events:** Sessions, Last Used App/Site, First Used App/Site, Completed Registration, Last Item Purchased, Last Article Read, Push Opt-in Status, Last Received Push/Email/Other Campaign, Campaigns Received

The building blocks of a modern marketing technology stack



Customer Engagement Platforms



Customer Data Platforms



Analytics Platforms



Data Warehouses



AdTech Platforms



Location Data Providers



Weather Data Providers



Recommendation Engines



Legacy Database Systems



Legacy Loyalty Program Software

The Marketing Technology Stack

Marketing technology is in constant motion, as new tools, techniques, and processes come online to help move the needle for customer engagement. The tech stack is the industry term for the efficient, layered, multi-vendor approach to marketing that produces the particular set of marketing tools that's right for an individual enterprise. Here are some of the layers common to a modern tech stack.

Major Stack Components

- **Customer engagement platforms:** These make it easier for teams to handle audience segmentation based on real-time behavior across channels, while leveraging automation, testing, and optimization based on campaign analytics.
- **Analytics tools:** These help marketers to gain insights from large volumes of data, and then take action on those insights with the help of other integrated tools.
- **Customer Data Platform (CDPs):** With CDPs, data stores aren't restricted to their original silos, but can flow in a managed, seamless way wherever they're needed across the organization.

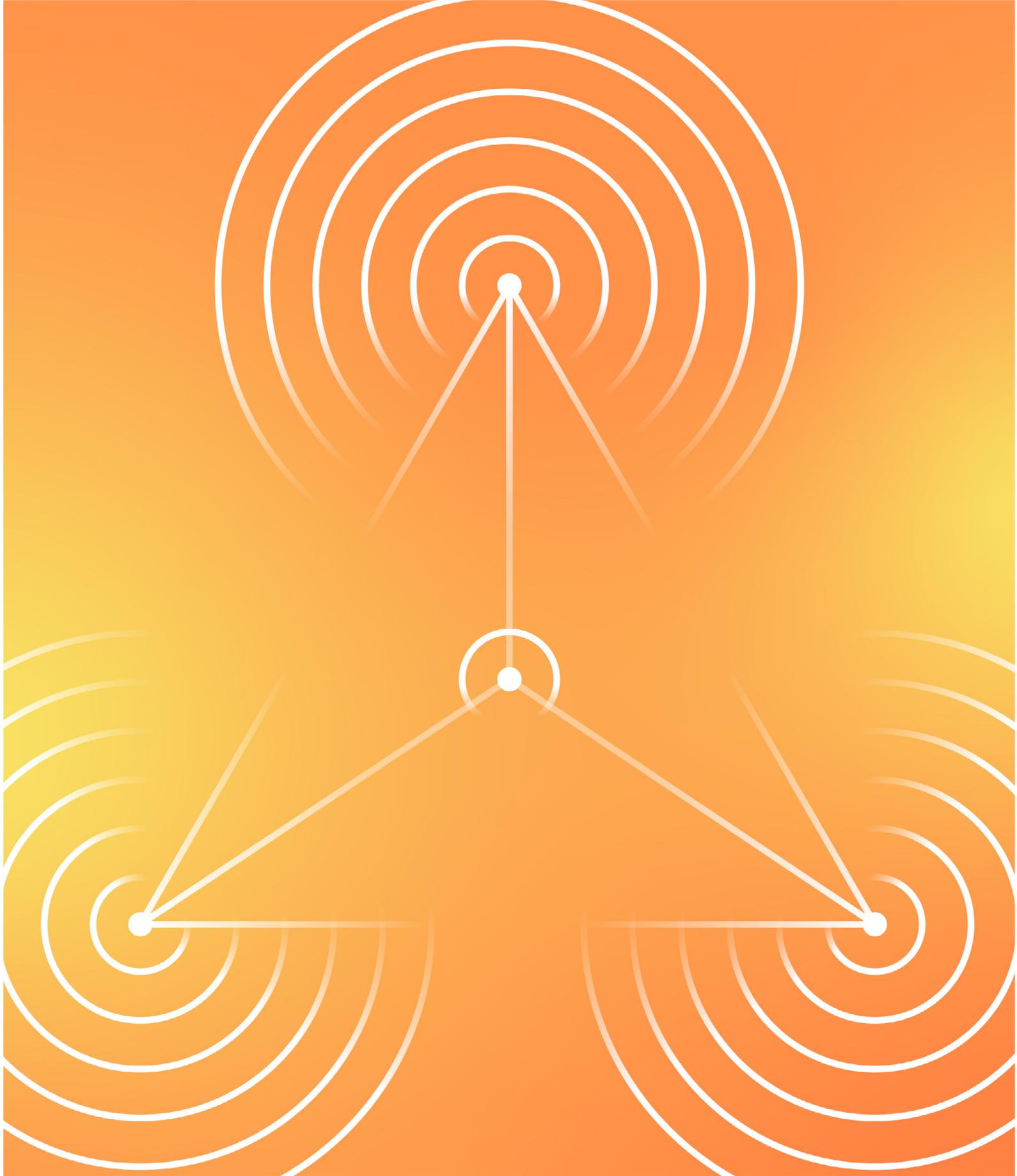
Other Technology Solutions

- Customer service platforms
- Data management platforms (DMPs)
- AdTech and ad retargeting tools
- Social media messaging and listening tools
- Conversion optimization tools
- Web content management systems (CMSs)
- Marketing calendar, organization, and task management tools
- Search engine optimization (SEO) and search engine marketing (SEM) tools
- Data enrichment tools, including location data providers
- Message translation tools
- Deep linking tools

Getting the Layers to Communicate

Having all these tools at our disposal is powerful, but only if they're organized in such a way that they can communicate with one another. The alternative is manual work for teams, which can introduce more opportunities for error and limit the potential to communicate effectively with your customers. When looking for marketing solutions, the ease of integration with the rest of your marketing stack, including vendor relationships with one another, is an increasingly critical consideration.

At Braze, for example, we enable our clients to integrate with a range of partners via direct integration, APIs, and webhooks. We know how important it is to get your tools online and communicating and your processes understood, so you can get quickly back to what's important: Running your business and building long-term relationships with your customers. [b](#)

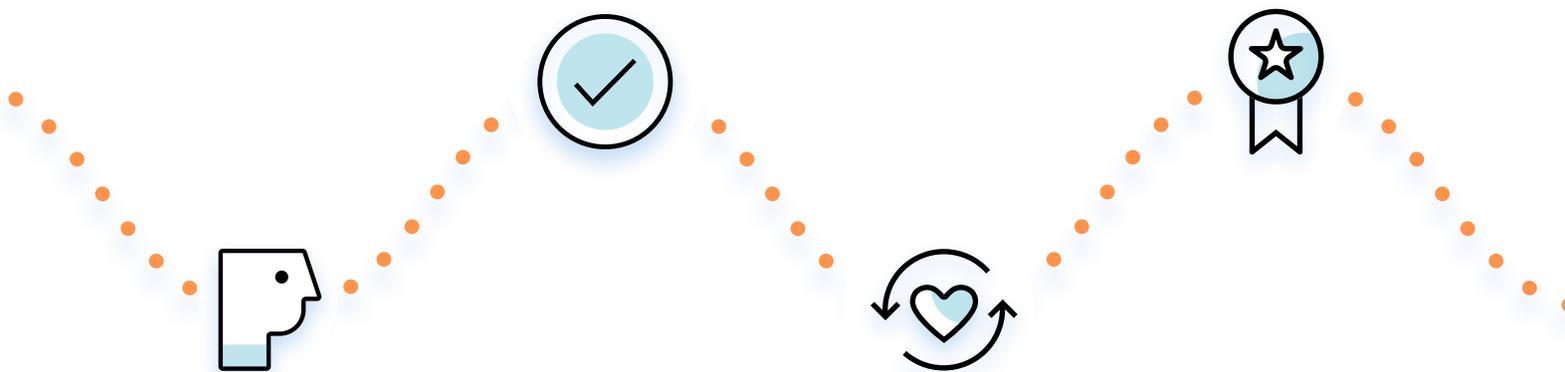


The What, Why, How of Modern Customer Acquisition

One of the many important takeaways from our Braze Brand Humanity Index is the fact that **31% of a company's brand humanity** comes from being perceived as personal and considerate. Giving potential customers the feeling that you really know them and can speak directly to them is a key starting point to any acquisition strategy.

Making that personal connection is increasingly difficult. Modern digital life—smartphones, computers, wearables, smart speakers, and new categories of connected devices in the Internet of Things (IoT)—have driven an explosion of user data, giving companies more information than ever before about who their customers are, what they care about, and how they're choosing to engage. But this revolution has also significantly expanded the number of ways available for brands to reach out to their audience.

All these brands using more channels across more platforms and devices have created a white noise effect. There's too much being thrown at the average consumer for them to engage with it all—there simply aren't enough hours in the day. To succeed, brands need to find ways to break through this fog of outreach, truly connect with the people in their target audience, and leverage those connections to build long-term, sustainable relationships. That's what an acquisition approach centered in brand humanity is all about.



Nine Acquisition Campaigns That Draw a Crowd

Acquisition campaigns focus on the brand awareness end of the funnel—gathering new customers and potential customers, and getting them to opt-in to receive your brand communications, by making sure they understand what your brand's all about. While other tactics focus on moving customers through the funnel toward deeper and deeper levels of engagement, this first stage is about drawing the right crowd to your funnel in the first place. So effective acquisition campaigns often work with partners, events, and other initiatives that may already be gathering the qualified audience you're looking for. Here are some examples.



1. Partner & Co-Marketing

Messaging campaigns that feature—or are in collaboration with—another brand.

Example: A new local microbrewery that partners with local pizzerias on a joint email campaign offering a free tasting for their customers.



2. Holiday & Cultural Tentpole

Messaging that piggybacks on the universal recognition factor of a holiday or pop culture moment.

Example: A hotel chain with a new theater offering showcasing it with promotions highlighting their series of Movie Nights timed to coincide with the run up to a major awards show.



3. Event Promotions

A campaign built around a specific event that's already gathering likely acquisition targets.

Example: Sponsoring a major pro football party tied to a championship game to raise awareness for your new sports betting service, delivering your messaging using advertisements, tickets, swag bags, signage, etc.



4. New Product or Program

Messaging that raises awareness of a valuable resource to a specific audience.

Example: A digital ad campaign across multiple home-renovation websites raising awareness of a new do-it-yourself home renovation app.



5. Contests

An engaging idea that invites customers to participate in a competition that relates somehow to your brand messaging.

Example: A national craft-supply chain that hosts an annual gingerbread-house competition at the holidays, with regional winning entries displayed in-store and on their website.



6. Alerts

Opt-in messaging that directly informs and encourages user activity, usually with a specific call to action.

Example: A new line of eco-friendly lawn mowers invites potential buyers to sign up on their website to get a text or email alert as soon as the new model's available.



7. Breaking News

Messaging that informs users of immediate changes or updates.

Example: The website for a weekly TV show can offer to alert fans via email one hour before the show starts each week, so they never miss an episode; fans sharing this alert adds new fans to the site's opt-in list.



8. Daily Briefing

Messaging that provides daily updates and information.

Example: A men's lifestyle brand that presents a curated daily email of useful cooking, mixology, and entertainment tips.



9. Newsletter

Messaging that includes regular updates on the latest news and updates on a particular topic.

Example: A pharmaceutical company that creates a patient support newsletter gathering patient stories and relevant medical information for people suffering from a particular illness and their caregivers.

The Most Effective Customer Acquisition Tactics

Whether your acquisition goal is building your email list, increasing your number of app downloads, or gaining new shoppers in store or online, it's important to achieve an efficient balance between paid and non-paid (or organic) audience growth. Organic methods, like optimizing for search and promoting in social media, tend to gather high quality users at a slower rate. Paid methods, like search engine marketing and display advertising, can bring in higher quantities of users quickly, though not all of them will engage with your brand.

Here are some helpful best practices around commonly used acquisition tactics.



SEO/Landing Page Optimization

Every web-based campaign should start by focusing on the low-hanging fruit of page optimization. If you're not sure if your landing pages or customer data capture forms are optimized, here are some key considerations:

- **Targeted Landing Page**

The landing page should be in line with your campaign objectives and match the messaging and creative used in the assets pointing to it. For example, if you're running an email campaign for existing subscribers giving them a \$5 off promotion, the landing page for the promotion should mirror the look of the email, so they know they're in the right place after clicking through, and should NOT include elements like an email subscription pop-up or data capture form—since the audience for this page has already subscribed.

- **Landing Page Design**

The landing page should be short, to the point, free of clutter, and device-optimized. Responsive design that automatically resizes and reorients each page around the specific user device—laptop, tablet, smartphone, etc.—is the standard today. (You can tell if a page is responsive by dragging the corner of the window on a laptop or desktop view of the website horizontally; as the window shrinks, a responsive-design site will reshuffle itself so it looks appealing at different sizes.) The landing page should deliver a “thank you” page and email confirmation after any transactions you complete (like downloading a coupon), and should enable users to easily share content they like.

- **Clear Call To Action**

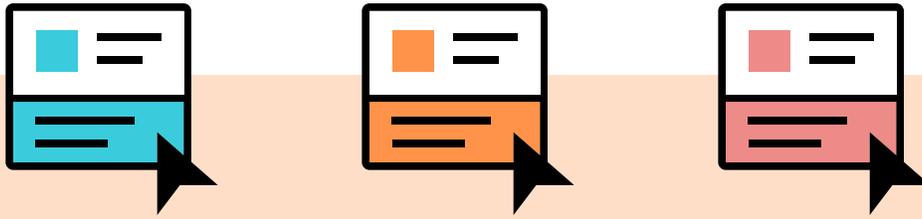
The call to action, or CTA (e.g., “Buy Now” or “Sign Up”) should be visible above the scroll, not buried at the bottom of the page, and shouldn't be positioned where it competes with other content on the page. Essentially, the moment you successfully convince a customer to take action, you want to facilitate that action easily and obviously, before they get distracted.

- **Search Engine Optimization (SEO)**

The more customers you can draw in via organic search, the less you have to spend on paid search and other forms of advertising. So instead of merely providing content you hope your potential customers will want, consider a long-term strategy focused on first discovering the exact keywords and key terms people who might be interested in your products or services are actively searching for, then designing your site to deliver specifically on those keywords and key terms. Each separate landing page can and should be a part of an overarching link-building strategy to raise your profile in search engine results...and lower your cost per acquisition.

- **Page Load Speed**

Consistently test your page's load speeds (Google has a free tool here: <https://developers.google.com/speed/pagespeed/insights/>), and work with back-end resources to decrease load times whenever and wherever possible.



Digital Advertising

Paid outreach is a key part of the acquisition equation for most brands, and in today's mobile-first, digital-focused consumer landscape, that usually means a significant investment in digital advertising. Here are some tools and techniques that can help you make sure you're investing efficiently.

- **Demographic Targeting**

Common ad channels include paid search, paid social, and display/programmatic. If your highest lifetime value customers tend to be female, live within 10 miles of a certain ZIP code, and are aged 18-34, you can target this key demographic specifically, for example, and avoid paying to attract people less likely to convert or provide the same lifetime value.

- **Tracking**

User-behavior tracking, including tags and tracking pixels, can help you see how each advertising channel, creative variation, landing page, and target segment performs relative to the others, allowing you to refine variables to improve efficiency.

- **Testing**

An iterative approach that continually tests elements such as subject lines, headlines, primary messaging, CTAs, images, and overall design can deliver significantly stronger results. For example, a testing program might let you serve up two different versions of ad creative to a combined 10% of your target audience, then serve ads with the winning content to the other 90%.

- **Channel-Level CPA**

With proper tracking in place, you should be able to see what the cost per acquisition (CPA) is at the channel level, and then track the cost for later actions such as making a purchase or creating an account.

Some channels may send more signups at a lower cost, while others that send fewer signups at the acquisition level may influence more qualified people at a lower price later. This lets you compare and get a firmer grasp of your actual ROI across the board.



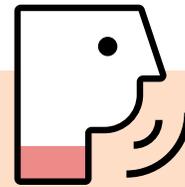
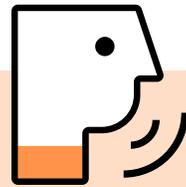
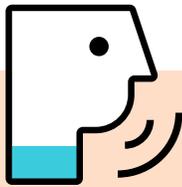
Content marketing

Leveraging content to better build a story around your company, educate current and potential customers, and increase organic customer acquisition can be a powerful approach to building out your customer base. But it's often neglected by brands, who can be overly focused on the siren song of large-scale ad buys. By creating and sharing out articles, blogs, videos, and other content targeted to your audience and in support of the keywords and phrases they're searching for, you can give current and prospective customers a better understanding of how your brand sees the world, and the value they can get from your brand.

Common content marketing channels include:

- Blogs
- Infographics
- Video content
- Social media and community content
- E-learning courses

Two further considerations: 1) Quality is really important. Are you creating self-serving content, or content your target audience will actually want to read, to be informed or amused? 2) Ease of use is important too. If the goal of content marketing is growth, you'll need to provide a pathway from your blog or email newsletter to the next step of conversion—whatever that may be—depending on your campaign objectives.



Word-of-mouth/referral/social sharing

There's a reason advertisers focus on word-of-mouth, referral, or social sharing. According to a [Nielsen report on trust in advertising](#), family and friends are the most trusted source of information about brands. And what better way to generate more prospective customers than by leveraging those loyal fans who already know, trust, and love your products or services?

Some of your brand's biggest fans may already be advocating for you, but you can make the process easier if you can give them the infrastructure to do so often and easily. (Think of ridesharing brands with their ubiquitous share-a-promo-code-with-a-friend campaigns.) One often underutilized resource is your own employees, who may be the best advocates for your company...if you ask them and provide them the means to do so.

The Dangers of Too Much Data

Is there such a thing as too much data? There is. Powerful digital tools have dramatically expanded the ability of enterprises to gather tremendous data sets covering anything and everything about their customers, the competition, the industry, and everything else. But data on its own is just a digital string of numbers. Data is easy, in a sense—interpreting that data and strategizing around it is the hard part. And gathering more data than

you need can overwhelm teams with formatting, indexing, and other busywork. Too much data can introduce a level of complexity that makes it challenging for marketing teams to parse out meaning and take action.

Beyond efficiency, there are other good reasons to stay focused in your data collection efforts, including privacy concerns. People are increasingly cautious about entering personal or business information online, with good reason. Just because they've opted in for something that requires them to divulge personal information—giving up their personal address so you can send them a package, for example—it doesn't mean they're authorizing you to hit them up with a seven-page questionnaire. Gathering every piece of information your company might possibly need at some later date might sound reasonable in the boardroom, but it runs counter to the idea of brand humanity, and it's liable to engender resentment and form abandonment.

Be strategic in your data capture data, not comprehensive. Focus on what your team needs to reach your customer engagement goals, and on data that can fuel actionable strategies.

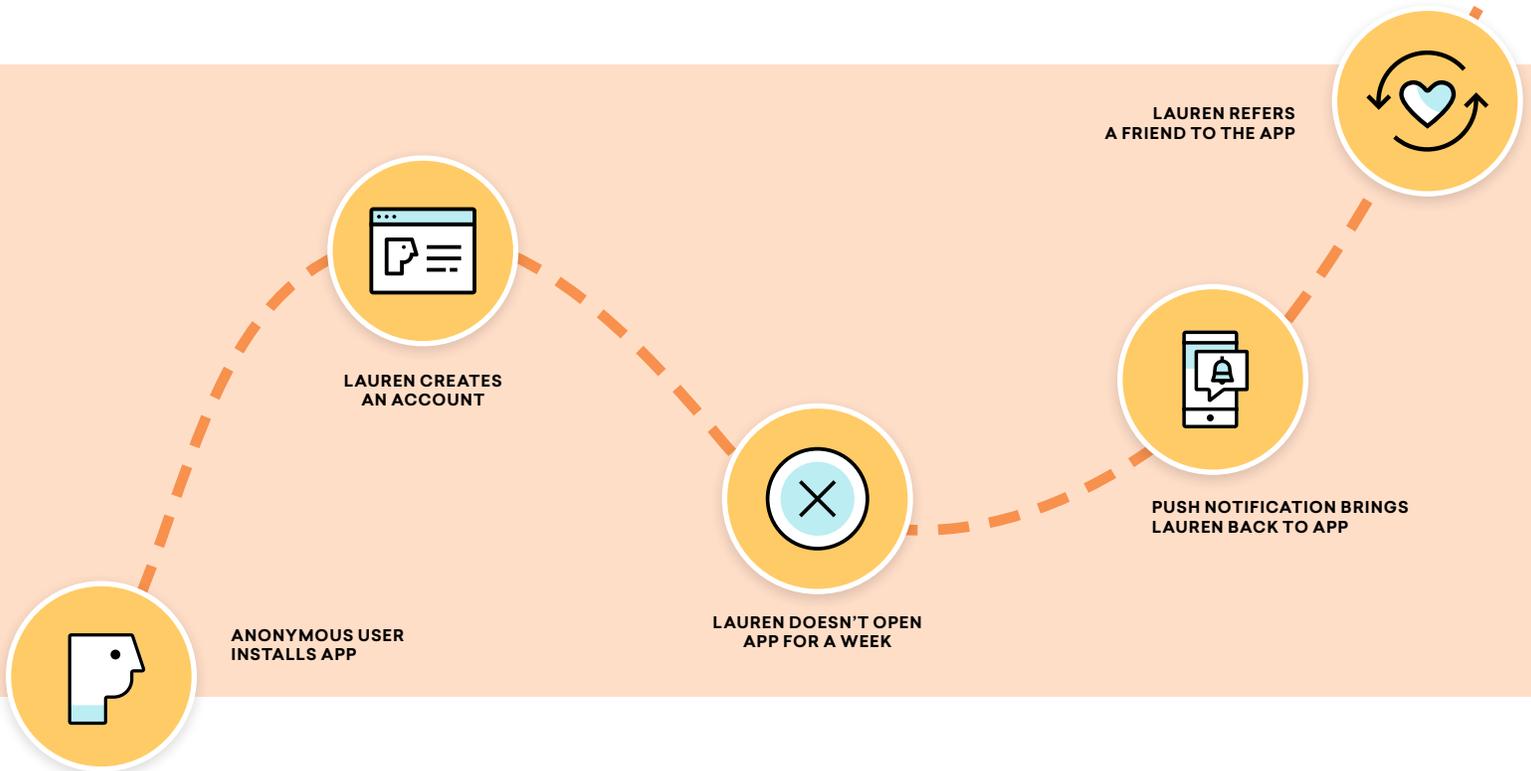
What level of data detail is enough? Enough to arm you to add value to your customer's experience at every step of their journey. If your team can set goals, identify the steps of the customer journey you'd like them to take, and use customer data around their attributes, preferences, and behaviors to enrich their experience each step of the way, you'll make your customers happy—and keep your teams productive and efficient.

Determining Your Data Needs

Brand humanity is about getting to know your customers as individuals so that you can take action on those relationships at scale. The process begins with gathering user data, which can be a challenge in a skeptical age. But if you define the data you need to collect strategically in relation to your overarching goals, it'll help you narrow your focus and improve your odds of success. Develop a mutually beneficial long-term relationship with your customers and they'll gradually let you know more about them, and you can build out productive user profiles over time.

Start by considering what actions you ultimately want your customer to take. Do you want them to make a purchase, send a message to a friend, sign a petition, or become a member? You'll need to work backward from there to determine the intermediary steps customers will need to take to complete that action. For example, before someone subscribes to your online service, they'll probably want to try it first to make sure it's right for them. And before they agree to try it, they might need to watch an enticing video that gives them reasons to believe.

These are called "customer journeys," a way of categorizing the ideal paths you'd like your brand's customers to take, and they can help you understand the data you'll need to gather to bring those ideal paths to life.



Let's say you have a streaming movie service, but many new customers are abandoning it or only using it once. Your goal is to guide new customers to consistently and frequently use the service. Your customer journey might look like this:

- Join the service
- Learn how to use the service successfully
- Become a repeat watcher

Guiding customers from step to step in that journey, at scale, depends on gathering user data that's specifically relevant to facilitating customer moves from one step to the next. From a data perspective, this means filling in those step-by-step user journey goals with checkpoints and targeted data needs. It might look something like this:

- **Join the service**

Data checkpoint: They supplied a name and email at registration.

Next goal: Guide them through an educational onboarding flow so they know how to use the service.

Data needed next: Do they log in and take initial steps before failing? Do they click on the online Help Guide?

Step-up strategies this data could support: For those who have logged in 2 or more times but haven't watched a video and haven't clicked on the Help Guide, send them a follow-up email with helpful instructions for logging in. Then look at how many of these targets convert.

- **Learn how to use the service successfully**

Data checkpoint: This registered user completed their first video

Next goal: Get them to try another video.

Data needed next: What day/time did they watch the video? Did they watch it at once or in two or more spans? What type of video was it?

Step-up strategies this data could support: Knowing even a little about this user's habits and preferences can help you target outreach more effectively, for example offering a two-for-one email that featured a movie in the same genre as the one they watched the first time.

- **Become a repeat watcher**

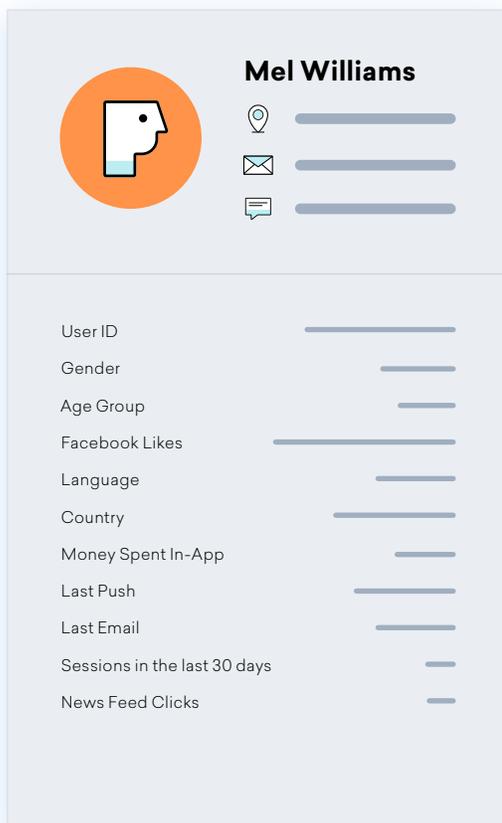
Checkpoint: 2nd verified video completion by registered user.

Success!

Gathering data can be a complex matter, with issues ranging from privacy concerns to encryption and storage to regulatory compliance. But if you start from the general principle of focusing squarely on the data you need to improve and extend the customer experience, you'll position your brand for long-term engagement success.

The Art Of the User Profile

Creating a central user profile for each customer is a long-term investment that will empower your marketing, growth, and engagement teams for years to come with real-time, accurate information about each member of your audience. Even if these profiles are sparse at the time of acquisition—some may contain nothing more than a name and an email address—you're laying the groundwork for what can grow over time into a powerful, 360°, cross-platform view of your customers.



This isn't just self-serving. For your customers, your thoughtful data capture can save them from inconvenient and clunky experiences like filling in duplicate information again and again, getting blitzed with irrelevant marketing campaigns, having to remember multiple logins, and other pain points. With a user profile, your brand can provide them with a personalized brand experience that closely fits their needs and preferences, an experience that's unified across their devices.

To do this, brands need a single repository for all relevant information about each individual, no matter what system or platform each data point originated from, so they can collect and compile that data into comprehensive user profiles that can drive targeting. For a brand with multiple points of entry, a single user's activity might initially be recorded in multiple places—on a website, using a smartphone app, visiting a trade show. But by enabling communication between their web, app, and IRL presences, brands can pull these behavioral instances together and unite them into one identity: A centralized user profile of each customer.

To get a true holistic view of your customers, you need a flexible profile setup that reliably compiles the information you already have and makes it easy or automatic to add more data, as well as data from new channels and devices you may not have originally

contemplated, like information from smart TVs or virtual assistants such as Amazon's Alexa or Google Assistant. Defining these flexible profiles and setting up a system that enables a flow of information in real time creates a digital representation of your customer base that is constantly enriching itself. Working with this data, you can group users based on demographic, preference, behavior, and engagement data from all sources, and improve your personalization and messaging, have a clearer picture of your users' journeys, and offer more engaging customer experiences.

The Do's and Don'ts Of Asking For Data

When it comes to collecting and using customer data, brand humanity means being sensitive to your audience's concerns and making it clear the information you're collecting is for their benefit—not just so you can sell them stuff. Here are the do's and don'ts.

DO...



...make it clear why you're asking for information. Explain how collecting and storing the info you're asking for will enhance their customer experience.

...ask for information at the right time. Establish an onboarding process that gathers information over time, continually communicating the value of each new request and asking only when the request is logical.

...offer a preference center (a web page or app section where customers can adjust their opt-ins and otherwise manage their experience). It lets customers personalize their preferences, and tell you what they actually want to hear about from your company.

DON'T...



...overwhelm customers by giving them too many options in the preference center. This is like the 20-page menu at the diner: It can lead to "analysis paralysis" and lower engagement.

...forget to invite them to update their preferences from time to time, via in-app messages, emails, or other channels, to remind customers you care about personalizing their experience.

...assume that someone who once opted in to hear from you is still engaged. Just because there's a preference center doesn't mean people are using it; they could easily be so unengaged they're not bothering to update their preferences.

Troubleshooting: When Acquisition Isn't Working

It may seem like growth managers and teams are must-haves that have always been around. The truth is, they are a relatively new phenomenon (thank Facebook for [pioneering the function just about a decade ago](#)), and are often still embedded in larger product or marketing teams. But there's a reason they've come into their own in recent years: When successful, growth teams are a driving force behind brands' overall business expansion and profitability.

When it comes to setting and executing growth strategy, there's no one playbook to follow in chasing after that coveted upward curve. And that's where problems can arise. Here are some of the most common trip ups, and how to address these potential pitfalls:

Top 6 customer acquisition mistakes

1. Not spending enough money

It can take time and some money to figure out which channels are working and how much it really costs to attract qualified leads—i.e., those who will convert and yield a return on your investment (ROI). Spending too little to attract qualified new users won't help keep costs down. After all, you get what you pay for.

2. Spending too much money

Of course, spending without specific goals in mind is also a trap to avoid. The holy grail is keeping customer acquisition costs (CAC) low while keeping return on ad spend (ROAS) or ROI high.

3. Investing in paid while neglecting organic strategies

Paid acquisition can help drive big bursts of sign-ups and, if budget is allotted over time, lead to a steady stream of new users coming in. But ignoring organic discovery channels, like SEO, is a bit like continuing to pay for produce when you have a vegetable garden out back. People with the intent to find products and services like yours are likely out there. They may be searching for companies like yours right now or discovering them from potentially untapped avenues like Twitter, YouTube, or influencer blogs.

4. **Wasting money on acquiring the “wrong” customers**

Some signs you’re throwing dollars at less than ideal candidates? People click on your ads but aren’t converting down the funnel. Or, if they are, they may be one-time buyers only there for a good deal or a quick free-trial binge. Stay away from spending on those who just aren’t in it for the long run.

5. **You’re baiting and switching**

Maybe it’s not intentional. The ads the creative team has thrown together are just so engaging. People are intrigued. They’re signing up. But then what? The ads and your product have nothing in common. People are churning. They signed up expecting one thing, but ended up with something else altogether.

6. **Forgetting to engage**

This can happen when different teams own discrete parts of the process—for instance, the growth team is responsible for acquiring users and engagement teams are meant to pick up the relationship from there. Whatever the reason, new sign-ups can get lost in the shuffle, keeping them from being properly educated and onboarded, and making it less likely they will find reasons to get into the habit of engaging with your brand and coming back regularly—so they don’t. Setting up nurture campaigns can help ensure that your newest audience members don’t fall through the cracks. 🕒



Self-Assessment: Is Your Website Optimized for Acquisition?

A successful acquisition campaign has a lot of moving parts, and when they move in a cohesive rhythm, customers are led from step to step in a natural, intuitive way that avoids jarring detours or flow-breaking dead ends. Using a website landing page as an example, below you'll find best practices to help you make sure you've fine-tuned each element of the experience for a harmonious, productive user journey that will improve acquisition. Can you answer "Yes" to these questions?

- Is the landing page targeted?**
 - The landing page should be aligned with overall brand messaging, structured around campaign objectives, and similar in design and tone to the assets pointing towards it.

- Is the landing page welcoming?**
 - The page should be short and free of clutter, optimized for a wide range of devices, and should deliver “Thank you” and email confirmation pages.

- Is your call to action enticing?**
 - Your CTAs—e.g., “Buy now” or “Sign up here”—are the most important real estate, and should be clear, simple, and easy to find as soon as the potential target is convinced to take the next step.

- Are you building trust at each stage?**
 - Including endorsements, testimonials, reviews, or certifications alongside company contact information, as well as clear explanations for the reasoning behind each point of data collection, will establish credibility and increase trust.

- Is the page optimized for search engines?**
 - If it's structured around important keywords, creates URLs and links in the ways search engines like, and is otherwise optimized for search engines, you're arming them to introduce you to potential customers the instant they start searching.

Are you continually testing and evolving?

- Testing out different headlines, primary messaging, images, data capture placement points, and even CTA button colors shouldn't be an afterthought—it should be an iterative process that improves your reach at every step of the way.

Is your advertising properly targeted?

- Wisely utilizing user profile information will make your spends efficient by keeping searches, paid social, and programmatic campaigns focused on those customers most likely to convert their interest into action.

Nothing is more frustrating to users than a website that feels aimless, confusing, and poorly designed. Using your larger brand goals and messaging as a guide, you can optimize each element to help ensure that more and more of those who make it to your landing page decide to stay awhile.



What Engagement Is, Why It Matters, and What You Need to Know

In the marketing funnel, the transition from the acquisition phase to the engagement phase is profound—it represents the transition from one-time, curious potential customers into a re-addressable audience. Engaged customers can be segmented strategically, addressed repeatedly and individually, messaged personally. And with brand humanity guiding your efforts, you can create an ongoing conversation with each customer that's productive for the enterprise and genuinely helpful and welcomed for the customer. Thoughtful communication like this can inspire an organic sense of brand loyalty that money literally can't buy.

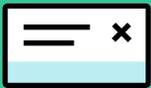
But customer journeys are rarely linear, and engagement won't be consistent across the different platforms and channels that make up your brand's overall presence. Customer engagement can swing from inactive to loyal and back again, depending on how you're communicating with them, how they feel about their experience, and factors out of your control, like competitive products and changing life situations. You may find that a given customer really loves your emails, but opts out of your push notifications, or reads your travel blog regularly but hasn't used your travel website to book a vacation in months. Keeping customers engaged is a complex, ongoing conversation.

Paying attention to your communication style and other details can really pay off in increasing engagement across your audience. It's generally easier to keep a customer engaged than to reengage a lapsed user, so focus your efforts on increasing engagement for downward-trending segments before they fall out of your sphere of control. By applying best practices, including those suggested by the Brand Humanity Index, you can put email, push notifications, in-app or in-browser messages, and other messaging channels to work keeping your customer base involved. Technology can

help you wisely segment, individually target, and personally customize your messages to ensure they're providing real value. Brand humanity can help you make your efforts dramatically more effective, as illustrated in this chapter.

Digital Channels: An Overview

Any one customer is likely to be present in many marketing channels, and customer engagement can take place on any one of them. Best practices suggest developing an optimal approach for each channel relevant to your audience. And that starts with thoroughly understanding those channels. Here are the major digital channels in wide use today, where your efforts can be easily fine-tuned, measured, and optimized.



Push notifications

Push notifications, typically short messages you receive on your smartphone or, more recently, in your browser or on a wearable device, allow brands to reach people wherever they are and during whatever they're doing. Perfect for brief, immediate calls to action, these "hot-now" messages have been blinking to life on screens since 2009, and with growing functionality like rich push and action buttons, it's becoming easier for brands to take a push strategy beyond simple, urgent communications and into richer, fuller, more interactive experiences. Because they're delivered in such a personal space—right between the text from Mom and the one from your boss—push notifications are best used sparingly, so your brand doesn't overstay its welcome.



Email

Email continues to remain central to the work and personal lives of many people, presenting an excellent opportunity for long-term engagement. Today this flexible channel can support messages long or short, visually rich or simple and spare, targeted broadly or individually personalized with dynamic content, and distributed optimally with tools like send-time optimization and exception events. These tactics

support stronger deliverability and provide a better customer experience. The challenge: Thanks to a plague of spam messages in the 1990s, email providers have become vigilant about ensuring that their users aren't overwhelmed with irrelevant or unwanted messages, forcing brands to be mindful about sending only to those who want to receive, or risk being blacklisted.



In-app/in-browser messages

An in-app or in-browser message is a message delivered exclusively to people currently engaging with your app or website. While this channel is currently a little underused, there's a lot of potential here—these messages can play an important role in supporting increased conversions, revenue, and customer engagement. In-app and in-browser messages are the perfect complement to email and push notifications: Those “outside” channels can do the heavy lifting beyond the app to re-engage customers, while in-app/in-browser messages can extend and expand the brand experience for users who actually return.



Short Message Service (SMS)

Texting's prime may have come and gone—according to data from Statista, [2011 was the year for peak texting](#), with 2.3 trillion messages sent in the U.S. alone. But since then, it's been on the decline, dropping to 1.6 trillion messages in 2016. But while SMS may not be the giant it once was, it can be a useful messaging channel under the right circumstances. Trying to reach users who don't have smartphones and can't receive push or download your app? Want to send an appointment reminder or confirmation, or update users on the status of a delivery or flight? Want to allow people who haven't given you their email address to reset their account password? For all these situations, SMS can be an effective way to communicate.



Content Cards

Content Cards are like a vivid, streaming inbox that the marketer controls, ideally informed by what the customer wants—picture the Facebook News Feed, but for your app or website. Like email, Content Cards are semi-permanent in nature, making it possible for a customer who didn't engage with a message in this channel to go back to it later if they change their mind. But while the recipient of each email you send decides what messages stay in their inbox and for how long, marketers can exercise direct control over Content Cards, making it easy to encourage customers to engage with your content.



Connected device notifications

Amazon's Alexa, Google Home, and other smart devices, personal assistants, and similar connected devices are quickly becoming a significant part of the consumer technology landscape. As they become ubiquitous in consumers' lives, the potential for using these devices to send notifications is growing as well. It is wise to be particularly careful and restrained when reaching out through these emerging channels, in part because customers are likely to be even more selective than usual about which brands they opt-in to hear from. As a marketer, you'll want to send messages that create specific, targeted value, so they're welcomed, not ignored or rejected.



Chatbots & "over-the-top" (OTT) business messaging

Should companies allow “bots” and other artificial-intelligence tools to speak for the brand? The equation is simple: If a bot can help you onboard and educate your customers at scale, solve your customers' problems faster, answer basic questions and free up customer service to handle more complex issues, or otherwise fuel customer engagement, it's worth considering. If not, just keep walking. If you need to engage users on Facebook Messenger, Line, or other [over-the-top \(OTT\) messaging platforms](#) (which are distinct from [OTT media platforms](#) like Netflix and Amazon Prime Video), it may make

more sense to leverage OTT business messaging, which allows brands to support automated, transactional one-to-one customer/brand interactions, usually at a lower cost than SMS text messaging.

Eleven Engagement Campaigns That Intrigue Customers

Engagement is the point in the funnel where communication switches from transactional to conversational—this is where your brand begins to lay out a proposal for a long-term relationship, and where some, but not all, of your one-time customers will become a re-addressable audience. Customer communication here needs to be finely calibrated, with the tenets of brand humanity firmly in hand, so the customer feels you take a genuine interest in their needs and concerns. Here are some examples of campaigns brands use to accomplish this.

1. Onboarding/Welcome Messages

This is a brief note that introduces your platform, and helpfully makes new customers aware of other services.

Example: A luxury auto brand sends a note that welcomes new buyers into the community, shares a "first oil change free" coupon, and invites them to visit a members-only blog.

2. New User Tutorials

Step-by-step walk-throughs that guide recent registrants through actions they need to take to access assets or services, with an emphasis on site navigation and platform engagement.

Example: A beachwear company with an app that lets you virtually try on bathing suits guides you through the process with in-app messaging.

3. Permissions Priming

Messaging that requests specific permissions from users, such as their preferred method of contact.

Example: An online education solution that offers emailed course results (in exchange for your email address), or text messages when a new class opens (in exchange for your phone number).

4. Recommendations

Messaging that points users, based on their previous activity, towards similar products or services.

Example: A hardware company that registers new barbecue grill purchasers, then sends a follow-up flyer to alert them to its charcoal, lighter fluid, and grill accessory offerings.

5. Voucher Offers

Purchase incentives, such as offers, coupons, discounts, or sales notices. Transactional in nature, but engaging when successfully presented as a helpful deal or an offer for insiders.

Example: A department store that sends a coupon for 20% off any one item on registrants' birthdays.

6. Cart Abandonment Notifications

Messaging sent when a user has added items to their cart without purchasing, or has otherwise left transactions incomplete.

Example: An online specialty goods store that sends a reminder email one, five, and thirty days after an e-commerce purchase was abandoned.

7. Favorites & Wishlists

Low-pressure invitations for customers to earmark items for possible later purchase.

Example: A gift shop that invites registrants to create a holiday wish list at a link that can be shared with family members.

8. Restock/Low Stock Warnings

Notices that helpfully inform a customer when an item they may have expressed interest in is running low.

Example: A wine and cheese shop sends a notice to its regulars that they're down to their last six cases of the in-demand merlot of the season.

9. Paywall Subscription Prompts

Invitations for occasional users to bypass access restrictions for protected content by signing up for a paid subscription.

Example: A global newspaper lets readers access the first 5 articles each month for free, but the sixth access attempt generates a popup blocker and a follow-up email with a subscription prompt.

10. Upsell/Upgrade Offers

Messaging that prompts users to up-level their commitment by moving, for example, from a free trial to a paid membership, or from a free ad-supported site to a paid, ad-free version.

Example: In-app messaging coaxes heavy users, during a commercial break, to skip the ads for a one-time fee in the app store.

11. Trial Offers

Invitations for customers to enjoy free trial periods for a product or service.

Example: A premium cable network offers potential subscribers a 30-day free trial, and uses that time to try to entice them into paid membership by leveraging Content Cards and other unobtrusive messaging channels.

Engagement KPIs You Should Be Tracking

Key performance indicators (KPIs) for engagement offer marketers a way to measure, on an ongoing basis, how well their brand is intriguing casual visitors and one-time-purchasers, and turning them into a returning audience of customers. Here's how to calculate these valuable data benchmarks.

Retention Rate

This metric shows what portion of customers you're retaining as a percentage of all customers; subtracting your retention rate from 100% gives you the percentage of customers you're losing, or your "churn" rate.

Retention Rate = $\frac{\text{\# of customers within a set period of time}}{\text{\# of people from that same cohort who were customers in a previously set time}} \times 100\%$.

Example: If 1000 people used your app in January, but just 200 of those same users also used the app in February, then your retention rate is $200/1000 \times 100\% =$ a retention rate of 20%

Daily Active Users (DAU)

This metric offers a deeper look into the makeup of your total users (a broad measure, including users of various activity levels) and helps you

understand how many truly engaged customers you have. Your daily active users number, or DAU, can be calculated for a specific day (say, yesterday's DAU), or averaged over a time frame of your choosing.

DAU = # of individual users who open your app or visit your website per day

Example: If you have about 1m monthly users in September, and a DAU of 100k, that means that you'd reach 1m different individuals in a month-long homepage campaign, or 100k different individuals on a daily campaign.

Monthly Active Users (MAU)

This metric measures monthly active users. Some brands will be more focused on DAU while others will prioritize MAU, depending on various considerations. For instance, no airline would expect to have most customers using their app on a daily basis, but a social network where most users only log once per month may be on the verge of collapse.

MAU = # of individuals who used your app or website in the last 30 days or in a given month

Example: If your stargazing app has been used 30,000 times by 15,000 people in the last 30 days, your MAU is 15,000.

Daily sessions per DAU

This metric gives you an idea of how often your active customers make use of your app or website. Popular social media platforms, for instance, might expect to see their active users opening the app for a couple sessions every day.

Daily Sessions per DAU = # of sessions in a day (or an average # of daily sessions over a timeframe) ÷ # of unique active users in a day (or an average DAU over a timeframe)

Example: If your e-commerce website has 12,000 average daily sessions, and 4,000 unique active users each day, your Daily Sessions per DAU metric is 3—meaning, your active daily users come on 3x every day.

Stickiness

Often used in a very fuzzy way to describe the degree to which a digital experience engages people, stickiness is a valuable metric that's

standardized in the following formula. First, divide DAU by MAU to get a percentage. The higher the percentage, the more often your users return. The closer your DAU is to your MAU, the higher the stickiness—or levels of consistent engagement.

$$\text{Stickiness} = \text{DAU} \div \text{MAU}$$

Example: If a company's German language app has 10,000 daily active users and 20,000 monthly active users, that represents $10,000 \div 20,000 \times 100\% = 50\%$ stickiness. If the same company's Chinese language app has 60,000 daily active users and 240,000 monthly active users, that represents $60,000/240,000 \times 100\% = 25\%$ stickiness. The Chinese app is larger, and arguably "more popular," but the German app is stickier—more engaging on an ongoing basis.

Effective Communication Starts with Strategic Scheduling

If you're clear with customers about how you intend to message and engage them, and take steps to communicate with them in thoughtful, responsive ways, you can see a huge, positive impact on engagement. But getting the timing and frequency of your communications right is vital to maintaining a natural cadence with customers that's consistent with the principles of brand humanity. We've all had the experience of an overeager brand that sent us too many irrelevant messages in too short a timeframe—a problem we dispensed with by opting out of that brand's messaging altogether.

Thankfully, getting your priming and timing right isn't rocket science. A good rule of thumb is to treat your brand's delivery timing like you'd treat the timing of your own personal communication. Be quick when responding, considerate when sending, helpful and personal in your approach. Don't communicate so much that you're annoying or so little that you're forgotten. A little brand humanity can go a long way toward making your recipients receptive to your messaging over the long haul.

Here are some different message delivery timing options, and how each can help you strategically connect with customers in a way that's welcomed, not resisted.

Time-based scheduling

Sending all list members a notification at the same time—correcting for time zones—can be a good approach for a wide range of communication, including regularly scheduled events (e.g., a daily email newsletter) and communication around real-world events (e.g., a push notification wishing customers Happy New Year at midnight on December 31st). But for most campaigns, this blunt, one-size-fits-all method of scheduling isn't the most effective method, because people's lives vary widely in ways that correspond very little to the time on their watches.

Action-based scheduling

Sending a customer a message after they've taken a trackable action is literally responding to customer behavior, helping to ensure that recipients will find your messaging more relevant and valuable than if it arrives out of the blue. The ideal is personalized, responsive communications that provide great follow-up experiences at convenient times based on the user's prior actions. Our research has found that this type of campaign delivery vastly outperforms simple time-based sending, creating a [331% lift in overall mobile push open rates](#) compared to campaigns with basic time-based delivery, a 250% increase for email open rates, a 346% increase for web push opens, and an incredible 888% increase in conversion rates.

Send-time optimized scheduling

When there isn't a trigger action to schedule messaging around, a brand can optimize engagement in other ways. Send-time optimization leverages machine learning to automatically send a given message during each recipient's unique high-engagement windows. This optimal send time is determined by analyzing past interactions in each channel, to narrow in on the time when the user has been most likely to engage in the past. According to our research, using this kind of delivery message boosts engagement [by an average of 25%](#).

API-triggered scheduling

This scheduling approach allows marketers to trigger messages not just based upon customer actions on their app or website, but also in connection to information on their own proprietary servers or systems, or from an external Application Programming Interface (API), like a weather-information or location-data platform. (Imagine triggering a push notification announcing the winner of a presidential election when your internal servers are updated with the final vote count from Ohio, instead of

having to email your mobile marketing manager to build out the message when the news comes in.) This type of campaign outpaces simple time-based scheduling by leaps and bounds, with a [681% lift in overall mobile push open rates](#), and an 897% increase in conversion rates.

Immediate-send scheduling

This scheduling approach allows brands to ensure ASAP delivery of a message in situations where the impact of a given piece of outreach will only decline with time, like breaking news, a product release, or a limited-time offer. The approach has limitations in terms of its ability to engage (it might arrive at high noon for some customers, and 4:00 in the morning for others), but when you need to get information to your customers as quickly as possible, there's no substitute.

braze **BRAND HUMANITY INDEX**

How to Engage: The Braze Brand Humanity Index

Understanding what you can about customers through consolidated user profiles, adjusting your messaging timing to be responsive and relevant, and being genuinely helpful and considerate are great ways to incorporate brand humanity into your customer outreach. But all that effort can fall flat if the tone of that communication sounds too corporate or salesy. Brands are not humans, and the humans who work for brands can find it difficult,

at times, to speak on behalf of a brand in a believable way. Here's where the magic of Braze's Brand Humanity Index really delivers, because what actually resonates with customers turns out to be quite different from what some marketers may think.

Judging from TV advertising, one might assume that the world's top brand marketers feel like brands need to be “quirky,” “fun,” or “amusing” to resonate. But a look at the [Braze Brand Humanity Index research](#) makes it clear that these characteristics are actually among the weakest predictors of brand connectivity.

For the study, we considered both emotional attributes and functional attributes.

For emotional attributes, participants selected from a list of 30 provided terms, like “helpful,” “friendly,” “thoughtful,” and “fun,” to describe the emotional side of a brand experience. In the first table, you can see the top nine emotional attributes chosen—the highest predictors of whether a brand was perceived as human-like. Forrester summarized these MVP emotional attributes as “supportive,” “authoritative,” and “helpful.”

Emotional Attributes most likely to drive perceptions of Brand Humanity	
Rank	Attribute
1	Responsive
2	Social
3	Friendly
4	Thoughtful
5	Helpful
6	Personable
7	Intelligent
8	Honest
9	Reassuring

For functional attributes, participants selected from a list of 18 provided thoughts and phrases, like “values my time and business” and “understands my likes and dislikes,” to describe their experience from a utility perspective. In the second table, you can see participants' top 10 choices, grouped into three categories: Natural Communication, Considerate Communication, and Personal Communication.

Functional attributes: Three categories		
Rank	Attributes	Category
1	Speaks like a regular person would	Natural Communication
2	Shows they value my time and business	Considerate
3	Communicates with me in the tone I want them to	Natural Communication
4	Is responsive to me when I need it	Considerate
5	Sends me clear, understandable messages	Natural Communication
6	Shows they understand what matters to me right now	Personal
7	Communicates with me at convenient times	Considerate
8	Communicates with me using preferred contact method	Considerate
9	Provides great recommendations	Personal
10	Understands my preferences, avoids what I don't like	Personal

From the attributes customers rated most likely to positively influence their perception of brand humanity, The study compiled four powerful "levers" that brands can actively utilize to most efficiently influence their audiences' perceptions of brand humanity.

- **The "Natural" lever**

In the minds of the customers we studied, 36% of a brand's perceived humanity stems from its ability to communicate like a regular person, in a tone that resonates, and in a style that's clear and easy to understand.

- **The "Emotional" lever**

33% of brand humanity comes from tapping into customers' emotions by being responsive, social, friendly, thoughtful, and helpful, from most important to least. While this was the second-strongest driver of consumer perception of brand humanity, it was the strongest driver of purchase intent and overall satisfaction.

- **The "Personal" and "Considerate" levers**

These two levers, taken together, comprise the remaining 31% of brand humanity perception. They describe a brand's ability to come across as knowing you personally and using that knowledge to take considerate action, for example conducting outreach only at times when, based on your interaction history, you will welcome the information and won't be annoyed at the interruption.

There's no question that brand humanity engages customers. What this groundbreaking Forrester study showed was specifically which aspects of brand humanity were most valuable in increasing and maintaining customer engagement over the long haul. By leveraging these specific, attribute-driven strategies, brands can engage their audiences effectively and efficiently.

Still traveling to `{{${location}}}`,
`{{${first_name}}}`?
Get `{{custom.attribute.$offer}}` off! 👉



[← Mailboxes](#) [Edit](#)
UponVoyage
Still traveling to **Boca Raton, Nicole?**
Get **15% off!** 👉

The Magic of Personalization

Personalization is a proven strategy for increasing customer engagement. Here are four cutting-edge techniques brands are using to leverage this powerful approach.

Liquid

Liquid is an open-source templating language, or syntax, that lets brands easily add personalized elements to contextualize their outreach, making it possible to address customers by name, reference brands they like, and give discounts based on their location. Our research has found that personalizing messages [using Liquid boosts push open rates by 225%](#).

Dynamic Content (a.k.a. Connected Content)

Dynamic content, powered by third-party APIs that update content in real time, keeps your customer-facing content fresh and up to the minute. By pulling in current information from a variety of public and private systems using dynamic content, you can supply customers with targeted, specific news and information they're likely to be interested in before they know to look for it. (For example, you could use a weather API to embed weather-alert content based on your users' geographic locations.)

Segmentation

Segmentation enables you to divide your audience into logical groups, and to customize content appropriate to each group, for a more relevant, and therefore more engaging, user experience. Segments can easily overlap (so one user can be a member of both "recent purchasers" and "Michigan-based customers"), and the strength of your segmentation efforts depends on the depth and quality of your data and the precision of your approach. For example, you might send a promotional message that's relevant only to your audience base in Michigan, and a related, but differently worded message to all recent purchasers—segmentation makes it possible for you to send both messages to their appropriate groups, while sending only one message, not both, to users who are members of both groups.

Machine Learning

While segmentation can help you shift away from one-size-fits-all marketing into deploying more relevant communication tailored to specific groups, savvy marketers are already using AI-based technology to go even further, and begin working toward the holy grail of unique, 1:1 brand-to-customer engagement experiences. They're leveraging the power of machine learning, an artificial intelligence (AI) technique where the system gradually improves itself with little or no human intervention, to personalize customer experiences at the individual level.



The Braze platform leverages machine learning as part of its Intelligence Suite: Braze's Intelligent Delivery feature makes it possible for brands to optimize send time at an individual level, using machine learning to automatically identify every unique user's message-engagement patterns and chart their high-engagement time periods.

A Closer Look at Connected Content

Connected Content, also known as Dynamic Content, allows brands to connect deeply with a consumer by personalizing messages according to their needs and interests, as derived from their unique user profile data. With Connected Content, brands can provide personal recommendations or other tailored information, showing customers content that reflects a deeper understanding of what matters to them.

When brands use Connected Content, we see, on average:

- An **85% increase in Android push open rates**.
- A 25% increase in conversion rates from email campaigns. One Braze client saw a **114% increase in conversion rates for emails** powered by Connected Content.
- A 37% increase in web messaging open rates.

Connected Content is driven by data obtained from a variety of sources, including: 1) recommendation engines, which offer up suggested next purchases based on individual and aggregate customer data; 2) localized weather data, which can be leveraged to offer weather-specific promotions that speak to your customers' in-the-moment, grab-your-umbrella experiences; and 3) proprietary data from internal servers that could enrich your overall messaging.

Delivery Method Matters

As part of our validation of the Brand Humanity Index study, Braze compared the impact that action-based scheduling and API-triggered scheduling had on open rates and conversions, relative to simple time-based delivery. We wanted to gain an understanding of the quantifiable impact that send type has on the perception of brand humanity in terms of reinforcing concepts like “this brand values my time and business,” “they understand what matters to me right now,” and “they communicate with me at convenient times,” among others.

Relative to a baseline of time-based delivery, we found that action-based and API-triggered messages produced the following results:

- **A 331% lift** in overall mobile push open rates in campaigns using action-based (event-triggered) delivery
- A 681% lift in campaigns using API-triggered delivery
- A 250% and a 346% increase, respectively, for email and web push campaigns using action-based scheduling
- An 888% increase in conversion rates in campaigns using action-based delivery
- An 897% increase in conversion rates in campaigns using API-triggered delivery

Customer Segmentation That Delivers

One-size-fits-all messaging blasts are a thing of the past—effective customer engagement, powered by brand humanity requires an approach that's organic and personalized, achieved when brands segment their audience and use modern tools to personalize their approach, analyzing available data to define shared characteristics, behaviors, or interests so they can tailor brand messaging accordingly.

What does that look like? Gaming company Dots tracked player behavior, segmenting their audience so they could individually target promotions and make adjustments according to engagement level. Together with deep-linking and purchase-event tracking, strategic segmentation enabled Dots to increase the odds that players receiving promotions would be interested in the offer, resulting in a better overall user experience for the players, a **25% boost in average lifetime value (LTV) among all users**, and a 33% increase in the app's total revenue.

Troubleshooting: When Engagement Is Failing

Monitoring your audience's engagement data can quickly show you when something's going wrong. Here are some key performance indicators (KPIs) that demonstrate low or falling engagement, and how to deal with them as part of your overall messaging strategy.

Negative KPI #1: Push notification opt-outs

Many users opt out of push notifications, but if your opt-out rate seems to be increasing, odds are they're receiving content or communication that doesn't resonate. Make sure you're keeping your messages short, and using personalization (first names, recent purchases, etc.), send-time optimization (to ensure that messages arrive during each customer's high-engagement window), and other engagement best practices like including images. Sharing incentives and including rich media can also help, as can using A/B or multivariate testing to find the optimal approach for each send.

Negative KPI #2: Email unsubscribe rate

Losing email subscribers has implications for overall engagement metrics, such as retention rate and lifetime value. The "normal" benchmark for the email unsubscribe rate is much lower than that for push notification opt-outs—just **0.3% per send on average**, varying by vertical. To address a higher unsubscribe rate, focus on 1) starting things off right with new subscribers, 2) sending fewer, better, more personalized emails to existing customers to limit their reasons to opt out, and 3) find ways to reconnect with those who have unsubscribed (with a "We want you back!" coupon, for example). Make sure you're using a double opt-in for new email subscribers, to ensure they truly want to receive your communication, by sending an immediate email prompting them to confirm their email subscription. Avoid growing your list through bulk solutions like "renting" email lists—bringing in low-quality lists can lead to high unsubscribes and damage your reputation with your email provider, and may even run afoul of anti-spam regulations.

Negative KPI #3: App uninstalls

Even if your app is wonderful, keeping customers using it can be incredibly hard: On average, **the number of people who uninstall a given app in the first month after download is 28%**, and that doesn't count the people who just stop using your app without actively uninstalling it. To address a high rate of app uninstalls, make sure your app provides concrete value and has unique features, versus being a simple reiteration of the site's content. Also, ensure that the app is optimized, and doesn't take too long to load, or tax smartphone batteries. The more trouble your app causes, the more likely your customers will question whether the experience is worth the cost.

Negative KPI #4: Low company or app ratings

Ratings and reviews are highly visible to new consumers. Put simply, higher-rated apps get more downloads, and low ratings can make new acquisition difficult and expensive. Commit to an ongoing program of product improvement, and consider making attempts to re-engage lapsed users after upgrades, before they become inactive or disgruntled users. Finally, preferentially nudge loyal users to rate or review products and services, by sending a follow-up email to frequent users only, for example, asking them to rate or re-comment your app. 📧



Self-Assessment: Are You Optimized For Cross-Channel?

Today's customers increasingly expect seamless interactions with brands across a wide range of devices and platforms. And serving that expectation has become a must for any company that cares about the health of its customer relationships. If you aren't speaking to consumers where they are, you're giving your competitors a major advantage—one that can significantly damage your prospects over the long haul. But recognizing the value of cross-channel engagement and being able to carry it out effectively are two very different things.

To successfully execute a cross-channel strategy, you need to get the right data, technology, and teams in sync. Here are the six key questions you should be asking yourself.

Are the key channels covered?

Every brand is going to have messaging channels that it leans on more than others. The key is not to become so reliant on a single channel that consumers who prefer to engage elsewhere feel left out. If your engagement efforts already include the major digital channels—like email and mobile push notifications—it's time to think about whether you're missing opportunities to effectively deploy other outreach options. Other notable options include:

- Web push notifications
- In-app and in-browser messaging
- In-app or in-browser Content Cards
- SMS
- Over-the-top (OTT) business messaging

Now, are you optimized for all the main channels above?

In an ideal world, your brand's key engagement and conversion metrics would be gaining positive traction across all channels. But maybe your email open rates are below industry benchmarks—or push notifications are resulting in higher than desired notification opt-outs. When one channel outshines (or underperforms) others, these deviations can reveal where there's room for improvement.

Does your customer preference center currently take all active channels into consideration?

It's great to have a preference center offer settings for email and push notifications (and if you don't already, you're working on that, aren't you?). But what about other channels your company uses to deploy customer-facing outreach, like SMS or web push? As your channels evolve, be sure to incorporate each one into the preference centers you provide to your audience.

Is cross-channel messaging even possible with the customer engagement technology at your disposal?

Brands can innovate and deliver brilliant experiences with stacks in place that provide a single view of data, analytics, and customer profiles—and a one-stop shop for engagement activities. Having to use multiple platforms and logins to send messages in different siloed channels makes things clunky for the teams behind the scenes and for the consumers on the other end, significantly increasing the chances that you're serving up broken or incoherent cross-channel experiences to your customer base.

Is the company org chart set up to create cohesion or barriers?

Tech may not be the only source of silos. When channels are owned by separate teams—take a web team that oversees web push, a mobile team running apps and mobile messaging, and an email team producing newsletters and drip campaigns, for instance—the end result can be messy for everyone involved. Colleagues may be armed with conflicting priorities and goals and unable to communicate effectively, leaving customers caught up in the confusion.

Do you have a strategy for considering the benefits of new channels as they arise?

As a rule, you want to add new channels when they complement your existing cross-channel strategy (for instance, adding in-app messages to your email and push strategies to encourage conversions once a user has reached your app) or to open up new audiences or messaging possibilities to your brand. Taking the time to be thoughtful—and not to jump on the bandwagon anytime an emerging technology arises—may be against some marketers' natural instincts, but it's important to have a plan for how and when to evaluate and incorporate new technologies and messaging channels into the mix.



Self-Assessment: Is Your Engagement Strategy Working?

The day-in, day-out work that it takes to keep engagement high and churn low often gets the short end of the stick when it comes to attention and investment—but it's essential to your company's long-term success. But how do you know if the work you're putting in is paying off? Ask yourself these five important questions.

- How are you doing compared to channel and industry benchmarks?**

It's great to see stats like open rates for your company and watch them climb over time, but that sort of historical data is only one part of the engagement picture. To get a more complete view, compare your numbers to overall benchmarks for a given channel or by industry. With [Braze Benchmarks](#), an interactive report powered by Braze, Snowflake, and Looker, marketers can keep tabs by pouring over performance data for things like email and push open rates by channel, operating system, and industry.
- Are your growth goals and engagement goals in sync?**

When companies focus on high volume growth at any cost, engagement can suffer. One way to track how well growth and engagement are working together is to look at customer acquisition costs (CAC) and lifetime value (LTV) hand in hand. In general, the ideal ratio of LTV to CAC should be 3:1, meaning the overall return of gaining customers should be three times greater than your initial spend on acquisition costs like advertising.
- Are you missing opportunities to connect with and meet the needs of early customers?**

Educational videos and onboarding instructions may work for some users, but others will drop off if they're not finding value from the get-go. That's why it's crucial to look at engagement metrics for cohorts of new customers in order to distinguish their experiences from longer-term users and to gain insights about how and where they may be encountering issues.

When you intervene, do your retention campaigns make a difference?

Abandoned shopping cart reminders and re-engagement campaigns for lapsing users have become so common that they may feel like tactics that simply have to be employed. But the reality is that any retention campaign is only worth deploying if it makes a difference for the customer receiving it and for your company's engagement goals. A winback campaign or abandoned-cart nudge that doesn't, in the end, result in more satisfied customers isn't worth sending just for the sake of it. Take a hard look at how this kind of outreach is performing and whether it's meeting your goals; if not, it may be time to take a fresh approach.

Do you have a “one-and-done” problem—or is your loyal/evangelist segment steadily growing?

While not every single one of your customers may become a loyal brand evangelist, nearly all consumers in general consider themselves faithful fans of at least one brand. According to a survey reported by [Marketing Land](#), 90% of respondents consider themselves “brand loyal.” So if you're seeing a lot of “one-and-done” customers who come in for a hot sale or temporary use of your service, the problem may not be with your customers—but with your approach to attracting and engaging them. So take a look at your segment of loyal customers and ask for feedback. Learning why they have come to love and trust your brand may help reinvigorate your strategy for other segments.



What Retention Really Means— And How to Make It Happen

In the retention stage of the marketing funnel, this is where you make sure that your engaged customers stay engaged, and you can only accomplish that through consistent, thoughtful communication. This requires big-picture thinking and a clear strategy focused around gradually increasing the level of personalization in communications, with brand humanity as your guide, so that your customers feel like they're part of a productive, long-term, mutually beneficial relationship.

Some customer advocates bristle at the industry's use of phrases like “retention marketing,” because it seems to signal a business-driven, bottom-line approach that focuses purely on not losing customers. That's not what we're suggesting. Rather, we recommend a retention strategy focused on finding ways to move beyond engagement to truly connect with, understand, appreciate, and ultimately serve your customers over the long term—using tone, frequency, content, and communication delivery methods that are consistent with the principles of brand humanity and tailored, to the greatest degree practicable, to the specific needs and habits of each customer.

The customers who nontrivially engage with your brand—set up an account with your company, start clicking through to links in your emails, make purchases, and other kinds of trackable conversion activities—are your core, and business success depends on retaining them over time. Mastering retention is about figuring out and leaning into what makes your customers come back, and rolling back activities that seem to be pushing them away. Your approach to turning your customer's initial engagement into a long-term relationship must be data-driven yet flexible, individual but scalable, and founded absolutely on the basic premise of making a human connection to them. Here's how it's done.

10 Retention Campaigns That Get Results

Here are some campaigns that successful brands use to develop the kind of individual, personal, long-term relationships that retain engaged customers long after their initial interaction.

1. Onboarding/welcome campaigns.

Educating new users on how to get the most out of your app or website is the first, best opportunity to help new customers understand your brand's long-term value proposition. **Welcome emails have the highest open rates of any email type—about 50%**—making them a powerful tool for turning new customers into long-term active users.

Example: A flower delivery company that welcomes new users with quick links for customizing their profile, adding likely recipients, and opting in for a calendar of push notifications to make sure they don't miss big events like Mother's Day or family birthdays.

2. Transactional campaigns.

Password reset reminders, order tracking updates, and other purely functional communications may not be particularly sexy, but these messages provide real immediate value to customers, encouraging future opens, clicks, and purchases and contributing to a general sense that your brand is helpful and considerate.

Example: A home appliance company that offers FAQ assistance and a customer-service link triggered when a customer begins but doesn't complete an explanatory video.

3. Promotional campaigns.

Sending targeted, personalized messages letting customers know that a product or service relevant to them is newly available makes it clear to those customers that you understand their desires and habits, and are actively working on their behalf—a critical component of a long-term brand-customer relationship.

Example: A concert-ticket venue that sends push reminders to customers whenever an artist they've clicked on before is scheduled to play within the next 30 days and within 100 miles of their location.

4. Activity messaging campaigns.

If your app or website has an active sharing community, automated campaigns that let users know when their friends have made a post, shared a picture, or carried out other key actions can provide a recurring set of compelling, personalized reasons to re-engage again and again.

Example: An online streaming music service that sends an in-app message every time the subscriber's friends post a new playlist.

5. Retargeting campaigns.

Retargeting lets brands follow up with customers across different messaging channels, allowing you to keep testing the waters with your outreach and providing a clearer picture of customer preferences.

Example: A home security company that retargets readers of its online blog with follow-up advertising in other channels, keeping track of which channels yield the most sales or continued interest.

6. Active customer campaigns.

Long-term retention is about making sure active customers keep you top of mind, for example by putting your app on their smartphone's home screen. Active customer campaigns build on initial engagement by offering exclusive discounts, loyalty rewards, and other incentives to convert good customers into recurring customers and keep their engagement streak going.

Example: An airline that offers special benefits or occasional upgrades to its frequent fliers based on their in-app engagement or purchase level.

7. Abandoned shopping cart campaigns.

More than two-thirds of digital shopping carts are abandoned before customers complete the check-out process, amounting to **\$4 trillion** in lost sales. Sending reminders or follow-up offers of discounts or customer-service assistance can help recoup potential sales and give customers a concrete reason to come back to your app or website.

Example: An online candy shop that sends abandoned-cart reminders may not reactivate all customers, but doing so sends a message to all that the brand's outreach is specific to them, and worth paying attention to.

8. Lapsing customer campaigns.

Using conversion data to segment customers who are beginning to disengage, these campaigns can send targeted messaging reminding them of the value of your brand, highlighting new features that may be of more use to them, or simply asking them what's going on and how you can improve.

Example: A dating service that targets currently inactive former "frequent daters" with a gentle email wondering whether they've found love or would like to try again.

9. Re-engagement campaigns.

Not every customer who stops using your app or visiting your website will come back, but careful targeting and well-designed re-engagement campaigns can bring your former "best customers" back online.

Example: An online university that reaches back out to those who successfully completed courses and then lapsed to try re-engaging them with related courses.

10. Re-permissioning campaigns.

Customers who've opted out of one or more of your communications channels, but are still reachable through another, can be targeted with channel-specific reasons to opt back in and deepen their connection to your brand.

Example: A small business accounting software service with a robust email list can re-engage recipients who've opted out of push notifications by offering a new service that sends alerts to their smartphones whenever quarterly tax payments are due.



Secret Sale! We're taking 60%, 75%, 90% off. And the only way to get these deals is by enabling push notifications.

Enable push notifications and you'll get a message in the next 24 hours with all the details.

TURN ON PUSH NOTIFICATIONS

Retention Strategies: The Basics

Retention is a long-term commitment to your customers. Whether you're walking new customers through your brand's full value proposition, sending tailored messaging that makes them feel like part of a community, providing reasons to deepen their engagement, or making sure they feel welcome every time they come back, retention communications are strengthened by brand humanity. Here are some of the basic strategies that will keep providing customers with reasons to stay engaged with your brand over the long haul.

Onboard new customers completely.

One of the biggest factors in whether a new user will be retained is their very first interaction. That's why it's important that your first messages effectively communicate your brand's value, so you don't lose customers before they're fully onboarded. These customers have already chosen to engage with your brand; a fuller description of your products and services, and how customers can benefit from them, can only strengthen your argument, and acts as a powerful incentive to more fully commit to exploring your brand's offerings.

Humbly ask customers for feedback.

Are you soliciting and analyzing customer feedback on an ongoing basis? Customers have opinions, and they don't always take the time to send clear signals about what they do and don't like about your brand experience unless they're prompted to do so. These communications not only offer an easy path to understanding customer pain points before it's too late, but express a humility that feels genuinely human and positive to customers.

Personalize your messaging.

According to McKinsey, personalization efforts leads to higher customer engagement and **can boost average revenue by 10–30%**. Your abilities will depend on your data and strategy: Personalization can mean optimizing delivery times around customer habits, leveraging customer information like first names or their unique purchase history in marketing campaigns, differentiating content or messaging toward different customer segments, offering customers the option of “favoriting” or sharing individual content choices or recommendations, and a lot more.

Use cross-channel outreach.

Too many brands send all their customer outreach through a single marketing channel. To reach your audience more effectively, communicate across multiple channels whenever you can, combining—for example—regular email outreach with important ad-hoc push messaging and opportunistic in-app messages.



Braze research has found that using cross-channel messaging can drive as much as **an 844% lift in engagement.**

Prime your audience.

Your ability to email and send push notifications to customers is limited by your ability to encourage them to opt in. And you'll never get a better opportunity to do this than in the beginning. For each messaging channel your brand supports, invest the time to make a powerful argument for customers to opt-in for messaging in that channel: For example, with exclusive channel-specific content or other benefits. Don't just ask them to opt in—make it hard NOT to.

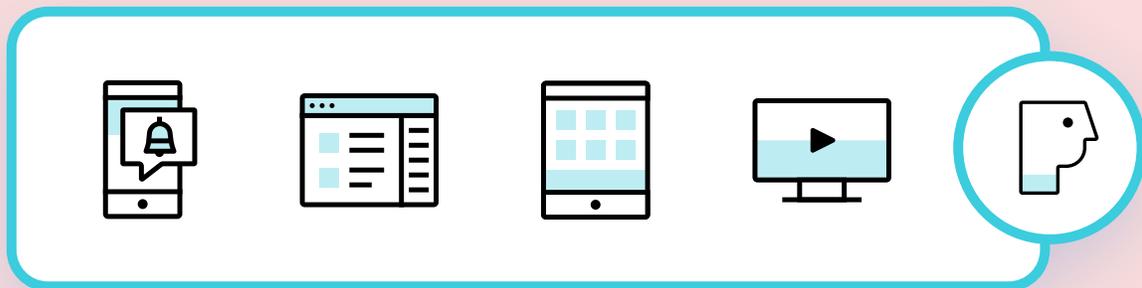
Experiment...always.

Marketing experiments like A/B testing or multivariate testing provide valuable clues regarding customer preferences. It's always easier to just send a campaign without trying variations, but that's a short-sighted way to look at marketing outreach: Cultivate the habit of always testing something unless there's a good reason not to, and you'll provide immediate efficiency benefits to the current campaign, and valuable data points for long-term retention goals.

Integrate data.

By comparing customer data across mobile, web, and physical outreach, you gain a 360-degree view of user preferences and behavior, and can then use those insights to provide a better customer experience.

Identifying customer segments who respond better to in-store promotions than to web messaging channels, for example (or at 5:00 PM vs 11:00 AM), makes it easier for you to engage them in their preferred channels and at preferred times and avoid bothering them in the others, increasing your odds of retaining each customer over the long haul.



Spread the Word: The Importance of Cross-Channel Marketing

Technology has opened up many channels for marketer/consumer communications. Customers are everywhere, and marketers who want to engage them need to take a holistic approach that optimizes their brand presence in each and every relevant channel. The modern customer journey isn't simple, and taking a cross-channel approach maximizes the opportunity to reach busy consumers wherever they are in their complicated lives.

The data supports this strategy. Looking at 300 million users globally, we measured the impact of cross-channel outreach on engagement, defined for the purposes of this analysis as the number of app opens logged by a given user who received some combination of email, push notifications, and in-app messages. [Here are the takeaways:](#)

- While each messaging channel performs differently, our analysis found that sending some kind of message was associated with higher levels of engagement, no matter which channel. Users who received messages via a single channel (either email, push, or in-app messages only) saw engagement that was 179% higher than users receiving no messages at all.
- When customers received outreach via two or more channels, their engagement jumped 166% higher than the single-channel rate, and 642% higher than customers receiving zero messages.
- Users who received the highest-performing cross-channel messaging mix from brands saw engagement rates as much as 844% higher than individuals who were sent no messages.

Communication in multiple channels is key to reaching all your customers. But leveraging multiple channels for the same customer can be a powerful force multiplier, helping turn occasional users into actively engaged, loyal customers. For most brands, that sort of shift has the potential to strengthen customer relationships, drive improvements in ROI, and help meet long-term enterprise goals.

Cross-Channel Strategy: The Fiverr Case Study

A few years ago, freelance marketplace Fiverr turned to Braze's customer journey management tool, Canvas, for help in redesigning their overall customer messaging strategy. Something wasn't clicking the way they needed it to, and they were willing to test and iterate as much as they needed to in order to optimize their communication and drive results.

Fiverr decided to start with their initial welcome offer to new customers, testing four variants, each with a unique approach to message timing, channel choice, and other strategic components. They were able to optimize all four of the variants they wanted to test using the tools available in Canvas, including:

- **Intelligent Delivery:** A send-time optimization tool that leverages machine learning to deliver messages during peak engagement time periods for each individual recipient throughout the day and week.
- **Exception Events:** This tool makes it possible to prevent messages from deploying in situations when they're no longer relevant—for instance, intercepting an abandoned cart notification from sending if a user completes the transaction before the message is sent.
- **Connected Content:** This technology lets companies dynamically add copy, images, and other content from public APIs and their own proprietary servers to messages in real time, ensuring responsive, relevant communications that won't appear dated.

For each campaign variant, Fiverr measured the total number of purchases, the purchase value, and the total revenue generated. They found that the best-performing campaign variant leveraged cross-channel messaging via mobile and web push notifications, in-browser and in-app messages, and email, producing an impressive:

- **8.8% increase** in the number of purchases made within three days
- 10.1% increase in average order value associated with those purchases
- 20.9% increase in revenue connected with that campaign variant

The bottom line: A strong cross-channel strategy coupled with a commitment to being as adaptable and flexible as possible can have a dramatic, quantifiable impact on a brand's communication effectiveness, driving increased revenue and other business goals.

Preference Center Management Empowers Customers (And Provides Data)

One of the most powerful ways to make customers feel more engaged is by giving them easy tools for customizing their own user experience. Customization and personalization that's directed in part by the customers themselves is more likely to increase the likelihood of future interaction. To that end, user profiles need to include more than just the information the brand wants to know—they should also include information about what the customers are comfortable sharing.

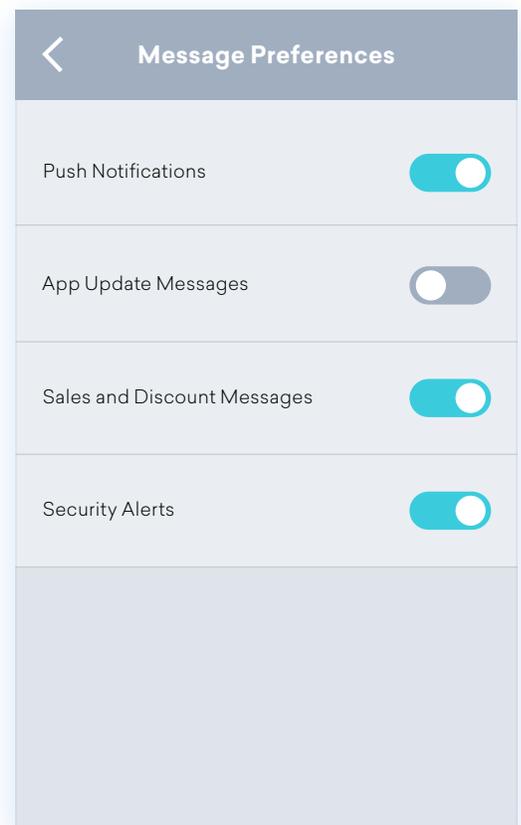
This is the world of customer preferences, and organized preference centers where customers can make their choices clear.

Increasingly, particularly in heavily regulated industries like pharmaceuticals and banking, mechanisms for understanding customer privacy preferences are required. But even if regulatory compliance concerns don't apply in your case, there are good brand-humanity reasons to give your customers ready tools to provide input on what they do and don't want to hear from your company—it's simply good corporate citizenship.

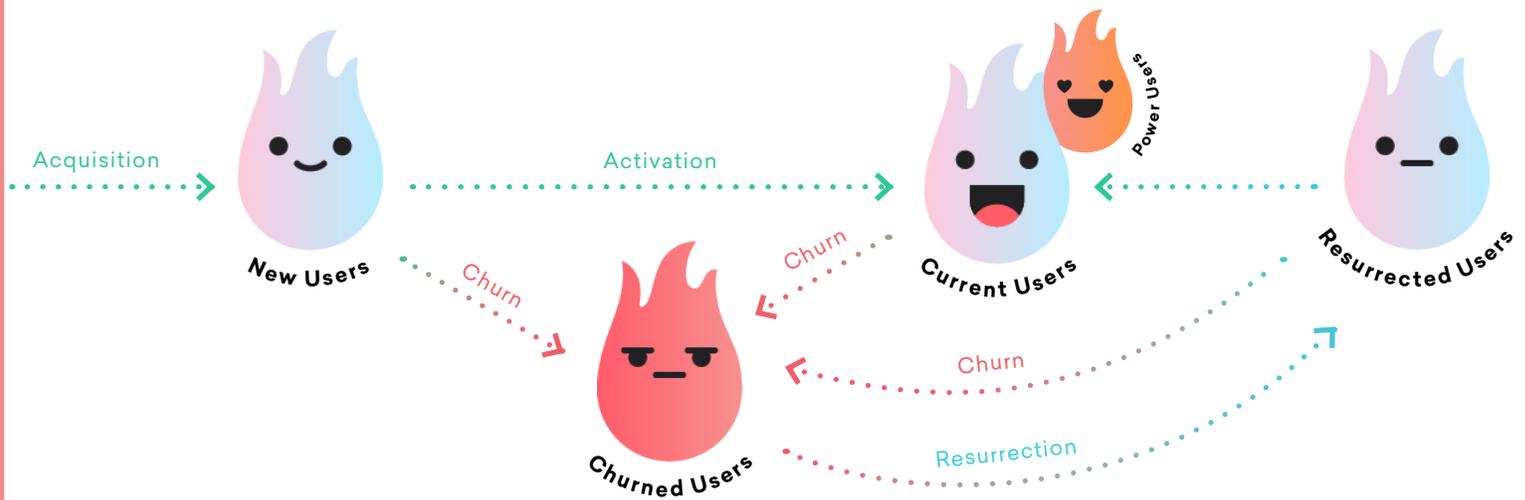
Brands who want to provide users with this level of control can do so by setting up a web page or section of their app, called a "preference center," where customers can manage their experience. To ensure user adoption, best practices suggest incorporating how to use the preference center into your user onboarding process.

Common preference center criteria include:

- Desired frequency of messaging (e.g., daily, weekly, monthly)



- Categories of content users want to receive messages about (e.g., promotions, breaking news, order status)
- Preferred message channels (e.g., email, text messages, push notifications)



Troubleshooting: Warning Signs of Churn (And How To Fix It)

It's long been common practice for companies to focus on winning back disengaged customers. Why? Because it's easier to sell to (or re-engage) people who have been customers in the past than to attract new prospects. But you don't need to wait for customers to actually churn before intervening.

After all, if you could see the signs that a relationship you cared about was on the brink of faltering, and you could do something about it before it progressed that far—wouldn't you try to fix things? Just like constant bickering and frequent blowups are the harbingers of impending bad romantic breakups, here are a few distress signals that drifting customers often send out before abandoning ship with brands.

They're going, going...

Be on the lookout when customers:

- No longer open push notifications or emails as often as they once did
- Make a habit of abandoning their shopping carts
- Let longer periods pass between the times they open your app, visit your website, use your services, visit you in person, or make purchases

The intervention: Was it something you said or did? It's time to dig into the data, do some testing, and figure out what's not working and why. Asking about your customers' preferences, requesting feedback, and checking in on how things are going are all simple, straightforward ways to gather more intel and make amends to users who might be on the brink.

...gone.

It may not be too late, but take note when people opt out of hearing from you on one or more channels, such as:

- Uninstalling your app
- Unsubscribing from emails
- Opting out of push notifications

The intervention: If you're not doing so already, it's time to build in a feedback loop and listen to what people are willing to share. For instance, when someone uninstalls an app, you can follow up via email to ask why. If someone opts out of push, but continues to use your app, you can check in via in-app messaging to learn how or why their preferences have changed. This cross-channel approach can help improve things for customers on the channels where they're still engaging and may potentially uncover larger trends or quality/relevance issues within certain channels. 🕒



Self-Assessment: Retention Practices

Some days, attempting to stem the tide of churn may feel as daunting as trying to save a sinking ship. Can you toss out life preservers—in this case, solutions—fast enough? Retention doesn't have to be reactive. Done right, it should be an ongoing practice, like learning to swim and making sure to do a few laps every day to keep things up.

Here are the six questions you should be able to answer to assess whether your company's retention strategy is built to effectively save disengaging customers—or if you're missing the boat on important parts of that work.

Are you collecting the right data?

You'll know you are if:

- You've defined your goals for data collection based on your industry's and your company's unique business needs (say, to be able to better convert free trial users to subscribers, or get people who start the account sign-up process to complete it within 24 hours).
- The information you're asking for and tracking is actionable (and ties back to your goals).
- You're gathering the three main types of data most brands keep tabs on:
 - Demographics and personal details
 - Interests
 - Behaviors and events

If you're collecting the right data, are you democratizing it?

If it's time-consuming for your customers to share their personal information with your brand when they first engage, consider what it's like to have to do it more than once: Frustrating (and unnecessary). That's why it's critical for companies with multiple customer-facing

platforms (apps, websites, email newsletters, in-person accounts, etc.) to leverage live customer profiles in order to make sure that important customer attributes and updates are available across all their customer-facing systems—in real time.

Do customers know what they're getting themselves into?

Imagine a scenario where one team is responsible for user acquisition messaging, another group owns onboarding, and yet a third department oversees engagement. Maybe you don't have to imagine this because that's the reality for your company and customers. If that's the case, having a clear picture of the end-to-end consumer journey is crucial to ensure there's continuity between what you're promising to deliver and what is actually presented to users throughout their experiences.

To get this right, make sure your onboarding flow is set up to demonstrate value and that customers are primed for outreach from you—i.e., they know what updates they'll be receiving and why they won't want to miss out, particularly for things like mobile and web push, where opt-out rates can be high.

Are you thinking about—and executing on—cross-channel outreach?

Customer preferences have always mattered but thanks to today's technology, brands can easily track them and act accordingly. When it comes to messaging channels, companies that take a single-channel approach risk alienating those who aren't fans of that particular channel—or failing to reach people who engage in multiple channels when and where they're active.

Which channels matter the most (and have the greatest impact) will vary based on your business model, but most companies operating today will want to consider the following when evaluating and establishing their messaging mix:

- Email
- Push notifications (mobile and web)
- In-app (and in-browser) messages
- Content Cards
- SMS
- Connected device notifications
- Chatbots and/or over-the-top (OTT) business messaging

There are many tools aimed at curbing churn. Are you using them all?

These key customer engagement tools can do a lot to help ensure your outreach is more relevant, valuable, and effective:

Personalization: Call your customers by name, and remember what really matters to them, like what membership status they've earned, what topics they're passionate about, what items they've browsed online, and more

Multivariate testing: Concoct winning combinations of the best messaging, color scheme, and calls to action by testing them out and refining them over time

Send-time optimization: Each message will arrive at the ideal time for engagement for each individual

Delivery method: How messages are timed and delivered can do a lot to boost the impact of your campaigns—and [Braze research](#) has found that action-based and API-triggered messages tend outperform basic time-based delivery

Deep linking: Guide people to the exact right spot and avoid losing them in a potential hunt-and-peck journey through your app or website

Is your content relevant, fresh, and meaningful?

When done right, welcome messages can be some of your top-performing campaigns. Activity messaging can give people a reason to keep coming back, sometimes every day (or even more often). Retooling these and other ongoing campaigns by segment and updating them using multivariate tests can help keep things attention-worthy.



Mastering Customer Loyalty and Advocacy

The ultimate goal of customer engagement is to turn a consumer, through careful management and trust-building, into a brand advocate. To guide them all the way from the casual interest of the acquisition phase, through the cautious intrigue of engagement, to the two-way helpful partnership of retention, and ultimately to the final phase: loyalty/advocacy.

Not every customer will make it this far, by a long shot. But those who do are worth investing in. They can move mountains for you, sharing and promoting your brand efforts like employees you don't have to pay, and adding a credible consumer voice to your marketing efforts.

Investing in growing and empowering your biggest fans—for example, by giving them access to early product launches, or hosting them at company events—can give your staunchest advocates a megaphone for trumpeting your brand values to their friends and followers. But loyalty is a two-edged sword. [Snapchat dropped \\$1.3 billion in value overnight](#) when a disapproving Kylie Jenner complained about its redesign to her 24.5 million followers. The more powerful your brand ambassadors are, the more important it is to keep them happy.

To succeed in the loyalty and advocacy phase, start by defining exactly what a “loyal” user is for you. Once you’re clear on what constitutes consistent engagement for your industry and your particular business model, you can then begin setting success benchmarks and tracking the growth of loyal users over time, defining campaigns around building loyalty and rewarding evangelism, incorporating the needs and desires of your brand ambassadors into your strategies, and deploying other tactics to keep your biggest fans deeply engaged, specially empowered, and eager to tell everybody they know.

Five Loyalty Campaigns They'll Tell Their Friends About

It's difficult to predict exactly which customers will become loyal and enthusiastic over time. But you can be reasonably sure some will if you're genuinely providing value. The key to developing evangelism is to watch for the spark, and coax it into a flame. Here are five examples of loyalty campaigns designed to kickstart active engagement, reward loyalty and advocacy, and build brand advocates over time.



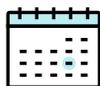
1. Reward Programs

Give loyal and frequent customers bonus gifts or access (discounts, free items, exclusive “first looks”). A great engine for coaxing casual fans into further investment into the brand.



2. Gamification Campaigns

Use gameplay dynamics to make rewards, discounts, special offers, and other goodies dependent upon accumulating points, levels, or other game elements.



3. Birthday/Anniversary Campaigns

Dip into your User Profile data, and package outreach around user birthdays or other notable life events, rewarding their continued participation in the brand activity (for example, with a 10% off Happy Birthday coupon).



4. App Updates

Updating your app, when coupled with careful communication, provides a great opportunity to re-engage with lapsed users, give casual users new reasons to increase their commitment, and create a quantum moment for current fans to share your app with friends and family. Watch the metrics, and you'll likely find some budding loyalists among the responders.



5. Milestone Messaging

Informing your users when their use activity has hit a significant stage (for example: \$200 in purchases) can help them know their investment is being noticed, and casts their continued involvement as a personal success. This kind of brand optimism can be infectious.

Encourage and Support Loyalty with Lifecycle Management

Like most marketers, we use the concept of the phased marketing funnel for convenience. But the driving concept behind brand humanity is making sure all of your communication with customers feels personal, human, and engaged. As customers move through the funnel, Customer Lifecycle Management is the process that makes their interactions seem less transactional and more like a fluid and evolving relationship with the brand. Customer Lifecycle Management is about being attentive and responsive to your users' needs as they evolve, keeping them progressing through every stage of your relationship all the way to brand loyalty and brand evangelism. Building strong, data-driven user profiles is key—communication that might be appropriately encouraging to a customer somewhere between retention and loyalty might seem irrelevant, bewildering, or simply annoying to a customer in a different phase.

Here are three key concepts to master around Customer Lifecycle Management:

Concept 1: Work hard to know what they know.

A thorough awareness of your customers' activity and engagement level is critical for effectively moving them along. Brands need to ensure that their customer engagement platform is communicating in real time with their loyalty program, to avoid mismatching messaging—a current loyalty program member for six months will bristle at continuing cheery email reminders to sign up for the program. Engagement platforms should support live customer profiles, which will update automatically when a customer joins a loyalty program, so the brand can use segmentation to target loyalty-sign-up messages exclusively to customers who haven't already joined.



Concept 2: Build their comfort by taking your time.

Always remember your customers are human, and subject to emotions like embarrassment, frustration, and irrational rage. Newcomers to your service or platform may be making it clear through their actions that they need additional onboarding help, but that doesn't mean that jumping in the instant they fail will be welcomed. Scheduling a helpful follow-up nudge to deploy at a certain later point can save you the embarrassment of overloading a new customer still hoping to master your platform. (At the other extreme, take too long to engage and your troubled customer might drop out completely. Optimize the ideal response window through testing.)

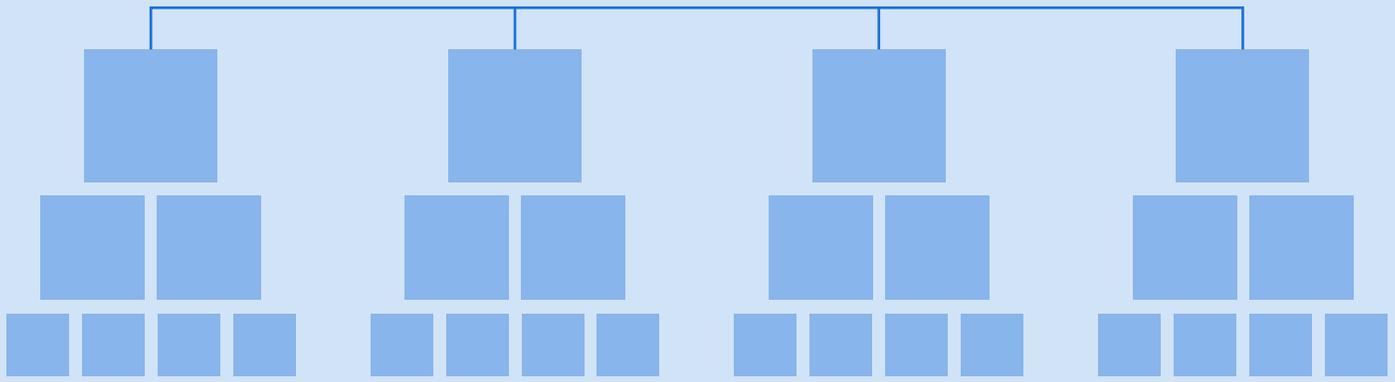
Concept 3: When the relationship stumbles, re-engage carefully.

A company can often re-engage lapsed or churning customers through "win-back" campaigns—an appeal to inactive customers that offers a new argument to come back and visit the company's store, website, or app. Some best practices for these include asking customers for feedback as to what went wrong, reminding them of your company's value proposition, and updating them on new changes or improvements that might change the equation for them. You can also offer incentives such as special offers or access, to lure former customers back. But be careful not to badger them: If incentives don't resonate with a given user, be willing to take no for an answer.

Tools for Managing Customer Journeys

Customer Lifecycle Management is a never-ending process of nurturing an increasingly productive consumer relationship. Customer journey tools make this long-term strategy possible, at scale, for the multiple teams (such as marketing, engagement, and growth, for instance) responsible for messaging and strategy across that lifecycle.

Customer journey tools make it easy to imagine, build, send, and optimize strategic campaigns, and they depend on a thorough understanding of timing, channels, user demographics, and larger brand goals. Starting from a clear picture can mean the difference between overwhelming your customers with a flood of disconnected messaging and reaching them with just the right outreach at just the right time in just the right channels—then measuring, adjusting, and iterating on the results for constant improvement.



Braze Canvas, for example, features the following Customer Journey Management Tools:

Visualization capabilities

These let brands monitor the different steps, stages, and messages involved in your customer outreach in a convenient, centralized location.

Branching workflows

These let you create dynamic messaging flows that correspond to a user's ongoing behavior, with branches that leverage real-time segmentation and personalization.

Testing tools

These tools enable head-to-head live testing of multiple variations of any given message across multiple parameters, such as channel choice, timing, triggers, and segments, to see what can be improved in every outreach.

Cross-channel support

These tools let you take full advantage of the efficiency improvement potential of multiple outreach channels—including email and push notifications—working in harmony.

Frequency caps

These limits keep you from inadvertently bombarding customers with too many messages (for example, sending multiple simultaneous promotional messages to a user who's in two or more of your send groups).

Keeping these user journey tools handy throughout your customer lifecycle will make all your efforts more efficient, from new user onboarding (e.g., visualizing the onboarding journey you want them to take, and testing against it), to discounting in-app purchases (e.g., using branching workflows to maximize purchase behavior), to shopping-cart abandonment (e.g., building and testing variations to determine the ideal time for a nudge).

How To Turn Loyal Fans Into Advocates

Loyal fans fill seats. Loyal *advocates* get their friends—and strangers—to fill stadiums. [Research](#) has found there's a specific value to the latter type of customer: Positive word of mouth from these folks can lift the purchase intent of others by 10% while negative feedback can reduce others' desire to buy by 11%.

Given this tremendous influence of advocates, engagement teams that are able to develop specific strategies for supporting brand evangelism—and successfully put them into practice—will have yet another opportunity to deliver results that make a difference to their company's bottom line. Here are some ideas to get started, or, if you're already on a roll, to take things to the next level.

Make sharing as easy as possible

Why are people still talking about an old-school email brand's growth hack—adding a tagline promoting its free email inbox to the signature of its [20,000 users'](#) outgoing emails—more than two decades later? The company jumped to one million users within half a year. That was enviable growth then and still is now. Part of that success story is because of how easy it was to share the service.

Inserting your brand growth goals and calls to action into your customers' conversations with others may be awkward, but companies that make it impossible to share their products and services aren't doing anyone any favors.

Give people a reason to talk about your brand

A more recent word-of-mouth campaign that went viral—on social media this time—in connection with the release of a high-profile biopic. The marketing team could have gone with a more traditional approach to promoting the movie, but they opted for a user-generated campaign where people could customize their own branded meme, putting the tools for generating buzz directly in the hands of fans. The strategy paid off: nine [million memes](#) were created and shared, [15K branded tweets](#) were shared per minute at the peak of the buzz, and the campaign was a number-one trending topic on Instagram, Facebook, and Twitter for two days.

Of course, not all companies have a Hollywood blockbuster budget to bankroll customer campaigns. And, frankly, it's not necessary. Active customer campaigns—ones sent as a reminder to check out new updates or celebrate milestones achieved, such as saving \$100 by referring friends—can give people a reason to engage and talk about what they've discovered or accomplished.

Don't treat fans like ordinary customers—because they're anything but

Loyal fans and brand advocates' wants and needs may vary, but one surefire way to make them feel undervalued and appreciated is to treat them like any other customer. A few ways to recognize their value include:

- Acknowledging their status and rewarding it
- Giving them a platform to share feedback, pilot new initiatives, test out beta services, participate in focus groups or market research, make friends, build a community, mentor new members, create testimonials, or participate in user-generated campaigns

What To Do When Your Tech Doesn't "Talk"

Your ability to deliver the targeted, personalized customer experiences that loyal users expect is dependent on your ability to test, iterate, and optimize every aspect of your communication strategy. That means making sure that your technology can support it—not just in terms of storage and power, but by enabling robust and reliable data collection, easy and democratic real-time information flow, secure communication and productive collaboration across teams (including remote or non-traditional teams), processes for processing customer feedback and preference updates, and many other elements.

In other words, your team needs to be supported by a modern tech stack composed of functional pieces that communicate well with each other. To determine whether your stack is up to speed, ask yourself these questions:

Are marketing and engineering on the same page?

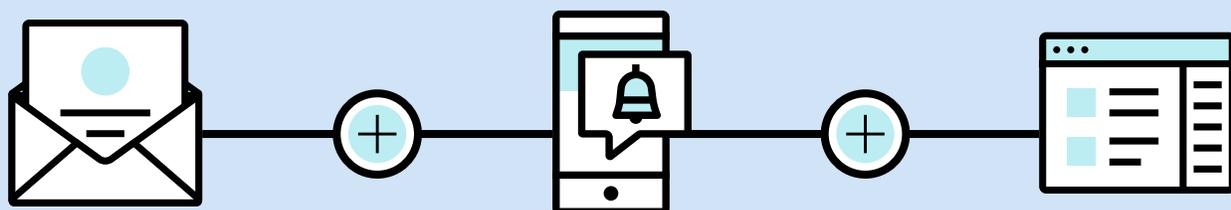
When putting a tech stack together, it's critical that marketing (what we need) and engineering (what we can provide) are in alignment. A mutual understanding of company goals and priorities, insights into the best tech available for each portion of the initiative, and resources available to tackle it all are best handled as a mutual conversation, held early and revisited as needs change. If your team has an existing stack that's not quite fitting the bill, pause and call the stakeholders together, rather than trying to requisition initiative-based solutions on an ad hoc basis.

Can your tech run independently?

When marketing strategies are dependent on engineering resources and other teams for day-to-day activities, your teams are limited in their ability to be instantly responsive to customer needs and wants. Being able to set up and run complex marketing campaigns without involving the engineering team at every step is vital for timing, responsiveness, and overall effectiveness.

Can your tech support campaign scaling?

Nothing cripples a timely marketing campaign faster than having to switch platforms when the scope of the original idea grows too large. That kind of disruption can set goals and objectives back irreparably, and be devastating to team morale.



Toppling Silos: Why a Holistic Approach Works Better

When your teams are operating in silos—an email team, a mobile team, and a web team operating separately from one another, let's say—it's tough to align on strategy and operate efficiently. Similarly, when user data isn't centralized and strategy isn't cohesive and single-minded, the fractured tactics can lead to disjointed customer experiences, repetitive or irrelevant messaging, and otherwise inconsistent brand experiences that can reduce brand loyalty and knock frustrated users right out of your funnel.

A better approach is to restructure your marketing organization so as to support a singular, holistic view of the customer across channels and across platforms. When your channel teams are working together, supporting and building centralized user data stores and aligning to overarching brand messaging strategies, it keeps the focus on the big picture: improving each user's overall experience, not just their channel-level experience.

- Imagine frequency capping, for example, that makes sure the same user doesn't get hit by two emails, two in-app messages, and two social-media ads in the same 1-hour period.
- Imagine being able to make use of intelligent automation tools to ensure customers receive messages via the channel their data indicates they're most likely to engage with.
- Imagine democratized data—an easily accessible, single source of truth about your users—that updates itself by experiencing the world as it happens, empowering teams across the organization to inform campaigns and product decisions in real time.

That's the ideal, but it can be hard to break down silos within an established organization. Your company's user data might, for example, be tightly controlled by a business intelligence team that others across the organization have to query for results, bogging down the ability to learn quickly from live campaigns. But if your BI team is the only team

with the tools and skill set to analyze the data, and the raw data wouldn't be actionable without their expertise, you might feel stuck with your inefficient process.

Consider bolstering your tech stack with tools that help your teams function better. Data visualization tools, for example, can help your teams understand information quickly without having to become data-analytics wizards, leaving your BI team free to work on more impactful projects. Employee management software can help employees track workflows, share goals, and give inline feedback to other team members. Task management tools enable easier cross-team collaboration and efficient project tracking. Advanced permissioning tools like the Braze Teams feature provide relevant parties with the quick, secure, specific access they need to do their jobs better.

Tools for helping you democratize data, create team clarity around strategic objectives, and improve transparency and collaboration across teams can be well worth the investment if they empower your company to achieve more effective customer lifecycle management.

Troubleshooting: Data Discrepancy

Your user behavioral data is only as precise as the settings that define it. Sometimes inconsistencies in those settings can arise that pollute your data and give you an inaccurate picture of who your brand's most impactful users are. If your numbers don't seem to be lining up, here are some potential culprits:

- **Conversion-rate discrepancies**

Conversions are incredibly valuable when assessing the return on investment of marketing initiatives, and great care must be taken when defining them. Even a simple idea like "How many users made it to our subscription page?" can have unexpected complications. When one user reaches the page twice, are we sure we're not inadvertently counting that as two conversions? It's usually worth running some tests before choosing which conversions to track, in order to ensure you're capturing what you think you are.

- **Lifetime-value discrepancies**

A customer's lifetime value (LTV) is a projection based on their value to date, and as such it can be calculated in several different ways. For example, you could choose to project a customer's value based on their spending to date, or you could predict they'll ultimately spend an amount equal to customers similar to them in other ways. When comparing LTV between two or more systems, make sure they're using the same calculation formula.

- **DAU/MAU discrepancies**

Daily Average Users (DAU) and Monthly Average Users (MAU) are commonly used representations of traffic. But things like time zones can affect DAU and MAU counts—for example, if different teams set one metric in EST and the other in PST. How a month is defined can also affect MAU counts, depending on whether the system is set up to calculate 30-day periods or the actual calendar months (which vary from 28 to 31 days). Check these measurements before you analyze results. [🔗](#)



Self-Assessment: Your 8-Point Checklist for Testing

Unsure whether your proposed testing is set up to optimize your campaign's effectiveness? Here are some best practices in place that can help you strategically design, prioritize, and assess any proposed testing approach.

1. Do you have a large enough sample size?

If your testing sample pool isn't large enough to indicate statistical significance you're only making semi-educated guesses. And if it's too large, it can drag out completion and remove too many users from the unsampled pool.

2. Are your test groups representative of the audience you're trying to get insights about?

For best results, your control and variant groups should share as many characteristics with your target audience as possible. If you're testing how late-night TV viewers will respond, don't send your test emails out at noon.

3. Are you truly randomizing your samples?

This is the best way to ensure, mathematically, that the test population is a good representation of the population you want to learn more about, so you don't get incorrect results that misinform strategy. For example, if you draw your test samples from people who respond positively to a pop-up on your website's homepage, you might unconsciously be tilting the results toward first-time visitors (since repeat visitors may be more likely to bypass the homepage and go straight to desired pages instead).

4. Have you mapped out your goals?

It's fun to test and discover, but all too easy to get stuck in the weeds of perpetual exploration. Prioritize goals and schedule your efforts around what's likely to deliver productive gains most quickly.

5. Have you developed an informed hypothesis?

For each proposed test, understand the problem you want to solve, then identify a conversion goal and a mechanism to achieve it. To make sure your logic is sound, express your strategy in the if/then format of a scientific hypothesis. For example, “If I add a ‘finish my purchase’ pop-up to my ecommerce site whenever the user has an abandoned cart, then 20% more people will follow through with the purchase process.”

6. Have you designed a well-targeted test?

Campaigns with too many variants may yield data that’s confusing, less actionable, and less reliable. Keep your test relentlessly focused around one or a few things you’re trying to determine—it’s usually better to run multiple simple tests with results you can count on than one that’s overly complicated and subject to interpretation. If your focus is on whether the value of your promotion is motivating people to make a purchase, for example, avoid introducing other potentially confounding variables like different subject lines.

7. Have you given yourself plenty of time to run the test?

Ideally, a nontrivial test should run for at least a week, to control for variations caused by different days of the week (for instance, weekdays versus weekend days), send times, and other factors. Longer test periods will usually better control for external factors, such as seasons, and holidays, and are more likely to yield statistically significant results. You may see a clear “winner” early on and be tempted to pause a test, but be careful—you may not have gathered enough data to control for variations or be statistically significant.

8. Did you analyze the results of your test?

Whether or not the results confirm your initial hypothesis, each test should deliver valuable information you can use to optimize marketing efforts going forward. (If your test came out with mixed results, don’t despair—redesign a new test and try again.) It’s important not to rest on your laurels: Keep testing other variants and further hypotheses to deliver more data and uncover further opportunities for improvement.

Achieving Statistical Significance

Remembering that you're testing specifically in order to apply the winning/preferential results to the greatest number of remaining individuals, your rule of thumb should be to test just enough users to generate statistically significant optimization decisions, so you can apply the winning strategy to the largest number of remaining customers. Generally speaking, you can achieve statistical significance with a smaller group if the results are more dramatic. So to decide between subject line A and B in an email campaign going to 10000 people, you could first test A vs B against 100 people. If A beats B by a large margin, release B to the remaining 9,900 people; if it's close, test another 500 people first.

Tips for Further Testing

Experiments don't prove theories—they support them. Ideally, you'd express your findings with some amount of confidence and some amount of uncertainty. And some of that uncertainty can often be reduced further with additional testing. For example:

- If the results are significantly different between your test and control groups, it might well be that your hypothesis was a success. But to reduce uncertainty and add confidence, analyze the data to make sure external factors weren't affecting your results.
- If the results for the control group and variant are similar, additional testing with a more refined hypothesis or different variants can help you produce findings that lead to actionable strategies.
- If the testing delivered mixed signals, for example Option A delivered higher open rates but lower CTR (click-through rate) than Option B, try rerunning as two simpler tests to parse out the true differences.

CONCLUSION

Brand Humanity—Putting The Human Connection First

The world is only getting more crowded, busy, and connected, with all kinds of distractions competing for consumers' limited attention. In this environment, brands that want to connect with customers need to work tirelessly to explore how emerging technologies can work together with their existing stack to help them continually improve customer experiences.

To succeed and thrive, brands need to build a genuinely productive partnership with their customers—one that plays out via a cross-channel, cross-platform, non-linear approach that reaches customers wherever they are, with the right messages and content at the right times, that incorporates customer feedback and preferences and advances a long-term relationship that's beneficial to both sides.

Brand humanity can make that happen.

Increasingly, customers are gravitating away from advertising and toward brand relationships founded on thoughtfulness, respect, and a deep understanding of their needs, preferences, and desires. Brands that can communicate their proposition like a genuinely helpful potential partner—rather than like a business with something to sell—will be welcomed instead of resisted.

Therefore, as you consider your enterprise strategy going forward, the question to ask is: How can new technology meet this emerging challenge, and help us engage with customers in a more “human” way than before?

This is a long-term commitment. You'll need to publish across multiple platforms, and send relevant messaging and content anywhere your customers and potential customers live. Build in a framework of data collection, user profiles, and segmentation, and leverage that data to provide valuable, intuitive, targeted, and personalized experiences to consumers.

Test and recalibrate your efforts relentlessly over time, gradually optimizing your messaging, targeting, timing, and methodology. First and foremost, add genuine user value at every turn, and make sure each new process or technology you leverage is easily understood, so as not to engender user frustration or abandonment.

The current explosion in data gathering is raising serious privacy concerns among individuals and regulatory bodies, and companies that don't want to risk consumer backlash are exploring smarter ways to listen closely to people's preferences and behavior in order to better understand their preferences. Enterprises that don't take the time to establish best practices for collecting, storing, and sharing data across systems in real time—including giving consumers the means to easily control their own communications preferences—won't be able to operate effectively in an increasingly protective and dubious world.

Brand humanity is a rock-solid guiding philosophy that ensures your efforts will build the kind of personalized experiences and helpful relationships today's consumer increasingly demands. We've explored how the principles of brand humanity can help you move beyond top-down messaging, insensitive data collection, and other forms of institutional thoughtlessness, and instead focus all your efforts on relentlessly improving and personalizing the customer experience that forges genuine human connection. If your brand can learn to treat customers as people, instead of data or wallets or transactions, you won't have to worry about breaking down consumer resistance—you'll be warmly welcomed as a partner, with a strong mutual relationship with each customer that built to the test of time. ⑤

Glossary

A/B Testing

A/B testing refers to the process of trying out two slightly different approaches to the same campaign, including slight changes to subject line copy, different images, or other small details. Whichever variant (A or B) performs better during a test can then be applied to the main campaign.

Action-Based Scheduling

When you trigger a response—such as an email message—to be sent to a customer after they've performed a trackable action like completing a purchase or filling out a profile.

Activity Messaging Campaign

When a company's app or website has an active sharing community, these are messages set to alert community members when someone they know has made a post, shared a photo, or carried out some other key action, in order to bolster engagement.

AIDA Model

Developed by advertising pioneer E. St. Elmo Lewis, the AIDA model refers to the four stages that a customer progresses through en route to a sale. It stands for "Awareness" (getting the customer to recognize your brand), "Interest" (enticing them to find out more about your brand), "Desire" (building excitement around your brand and products), and "Action" (making a purchase).

Analytics Tools

Part of what's known as the marketing tech stack, these tools help marketers gain usable insights from large volumes of data, so they understand what's happening and can potentially take action on that data through other integrated tools in the stack.

API-Triggered Scheduling

This allows marketers to schedule messages to be sent to users based on either external Application Programming Interface (API) data, such as weather

information or location-tracking data, or signals from a brand's internal proprietary systems (for instance, sending an email when a hotel customer reaches a new tier in an in-house loyalty program).

Application Programming Interfaces (APIs)

APIs are programs that allow different systems to communicate with one another, and can replace manual processes and allow data to flow between programs in real time. For example, allowing users to enter their own profile data (without the assistance of a customer representative) might utilize an API to store their inputs and send an automated 'Thanks for updating your profile!' response.

Brand ambassadors

Loyal fans and influencers who are rewarded by the brand with special access or other rewards, with an eye to empowering them to become official or semi-official advocates for the brand's products and services.

Brand Humanity

The process of making brand and customer interactions feel more "human" through language choice, mindful message scheduling, and other tools. The goal is to make customers, especially in the digital realm, feel as much like they are interacting with real people as possible through every step of their engagement.

Braze Brand Humanity Index (BHI)

A piece of commissioned research conducted by Forrester Consulting on behalf of Braze, during which over 3,000 people around the world were asked to describe their most recent brand interactions and evaluate them on a scale of how "human" each interaction felt.

Chatbots

An artificial intelligence (AI)-powered program created to answer basic customer questions, or to help

onboard new users, without needing a brand representative's assistance.

Connected Content (a.k.a. Dynamic Content)

A tool that allows marketers to dynamically add copy, images, and other content from public APIs and their own proprietary servers to messages—such as emails or push notifications—in real time.

Content Cards

A card is a single unit of content—presented in a visual manner—that allows users to interact with that content or functionality directly inside the context of wherever a user already is. Content Cards can be hosted on an app, website, or other digital platform, and are usually shown as a newsfeed-like content flow.

Cost Per Acquisition (CPA)

A key performance indicator (KPI), the CPA calculates the cost of an acquisition campaign against how many acquisitions the campaign produced. To determine the CPA, add up all the costs for the campaign, then divide the total by the number of conversions or acquisitions the campaign produced.

Cross-Channel Marketing

A holistic approach to marketing that puts content and messaging into multiple channels—email, in-app messages, etc.—for the same consumers; the combined effort will typically generate more engagement than single-channel marketing.

Customer Acquisition Costs (CAC)

Similar to Cost Per Acquisition, Customer Acquisition Costs (CAC) take into account a larger period of time beyond a set campaign in an attempt to determine how much money is being spent in total on reaching each customer. It is calculated by dividing the total marketing costs over a set time period (e.g., "year to date") by the number of customers acquired by those efforts during that time.

Customer Engagement Platform

A system set up for regular business communication between a company and its customers. Examples include email, mobile messaging, social media, and CRM (customer relationship management) platforms, or a solution designed to handle a mix of all these channels.

Customer Journeys

The ideal path a company would like its customers to take through its service offerings, from initial set-up and onboarding all the way through to customer loyalty and brand advocacy.

Customer Journey Management Tools

Tools used to imagine, build, send, and optimize strategic campaigns that guide customers through a desired trajectory across a company's platforms and services.

Cross-channel support: Tools that assist in linking and synchronizing multiple message systems, such as email plus push notifications, to avoid overlap, message spamming, or contradictory messaging.

Testing tools: Programs that enable live, head-to-head testing of messaging and delivery variants.

Visualization capabilities: Tools that allow brands to monitor different steps, stages, and messages involved in their customer outreach in a convenient, centralized location.

Customer Lifecycle Management

This term refers to the practice of being attentive and responsive to users' needs as they evolve through each stage of the business relationship. The goal is to use data and thoughtful interaction to foster long-term brand loyalty and evangelism.

Customer Service Platforms

Tools that provide customers access to advice, information, or walk-throughs, that allow customers to update information or preferences, and that

provide a process to reach a customer service representative when the supplied solutions aren't sufficient for their needs.

Daily Active Users (DAU)

This metric refers to the total number of individuals who open a company's app or visit their website on an average day.

Data Discrepancies

Variances in data that can occur if settings are not precisely or consistently aligned, and can be difficult to spot; if undiscovered, they can lead to data misunderstandings and unwarranted conclusions.

Engagement Campaigns

Marketing efforts geared around building a long-term relationship with a customer beyond the initial interest or transaction.

Exception Events

A program setting that prevents messages from deploying when they are no longer relevant. For example, intercepting a scheduled "abandoned cart" notification if a customer completes their purchase prior to send.

Frequency Capping

A way of monitoring messages sent out across different platforms to ensure that one customer doesn't get too many messages (via email, or push notifications, and social media ads, for example) in too short a timeframe.

General Data Protection Regulation (GDPR)

A law in the European Union that protects how personal data is collected and used globally. The GDPR defines personal data as "Any information related to a natural person, or Data Subject, that can be used to directly or indirectly identify the person." Examples of personal data covered by GDPR regulations include name, medical information, email addresses, banking information, social media posts, photos, IP addresses, and demographic information.

Health Insurance Portability and Accountability Act (HIPAA)

A U.S. law which regulates the usage of Protected Health Information (PHI), which includes addresses, Social Security numbers, dates of birth, demographic information, healthcare provider/medical records, and information stored by doctor's offices, hospitals, health insurers, and companies that work with PHI.

Immediate-Send Scheduling

An approach to scheduling where brands ensure the quick delivery of a message whose impact would otherwise decline with time, like breaking news, a product release, or a limited-time offer.

Key Performance Indicators (KPI)

Easily calculated baseline success metrics specifically chosen as representative of goals and objectives, compiled so as to easily track and measure the effectiveness or costs of a campaign, or to easily compare this campaign against others.

Levers (Natural, Emotions, Personal, and Considerate)

Four attributes of brand communication, deemed the most powerful and effective by the Braze Brand Humanity Index, that together seek to quantify the important human communications characteristics a brand or service displays to its customers.

Loyalty Campaigns

Campaigns and outreach methods employed with the goal of turning customers into brand enthusiasts and advocates over the long term.

Lifetime Value (LTV)

A metric that calculates the benefits provided by a customer (example: revenue from sales) over the entire timespan where they are a customer, which can be many years. If a customer's LTV is lower than the CPA (cost per acquisition) to bring them onboard, the brand has probably not received a good return on its investment.

Liquid

This refers to an open-source templating language, or syntax, that lets brands easily add personalized elements that contextualize their outreach, like addressing customers by name, referencing brands they like, and giving discounts based on their location.

Machine Learning

An artificial intelligence technique whereby a system uses feedback data to gradually improve itself, with little or no human intervention required.

Marketing Funnel

The term given to E. St. Elmo Lewis' AIDA model of customer progression—described as funnel-shaped because a comparatively large initial group gradually becomes smaller as some customers drop out of the engagement at each phase.

Monthly Active Users (MAU)

A metric that measures the number of users who engage with a company's website or app at least once over the course of an average month.

Multivariate Testing

A testing process that compares multiple variables within a single test, as compared to the simpler A/B testing that compares only two variables. Multivariate testing can deliver more complex results but can be trickier to set up correctly and often requires a larger dataset to get to statistically significant results.

Onboarding/Welcome Campaigns

Campaigns designed to be a point of entry that assists in introducing new customers or users to a brand's offerings.

Over-the-Top (OTT)**Business Messaging**

Instant messaging services or online chat provided by third parties as an alternative to texting are known as OTT messaging platforms. OTT business messaging involves brands using provided platforms, such as Facebook Messenger or Line, to reach and interact with customers active there.

Personally Identifiable Information (PII)

Information, carefully protected in some highly regulated industries, that can be used to specifically identify an individual user, such as name, addresses, Social Security numbers, dates of birth, demographic information, and health data.

Preference Center

A means provided by brands for customers to customize their personal user experience and define or limit brand communication in specific ways, including desired messaging frequency, types of content, and preferred messaging channels.

Re-Engagement Campaigns

A tactic for bringing back former customers who are no longer actively visiting a company's site or using its app, typically with special deals or incentives.

Re-Permissioning Campaigns

A tactic for convincing customers who've opted out of one or more of your company's communications channels—but are still reachable through another—to opt back in to the rejected channel.

Retargeting Campaigns

A tactic that allows brands to send follow-up communication to a customer across different messaging environments after that customer has indicated interest in one place, allowing brands to optimize their outreach approach.

Retention Rate

A metric that shows what portion of customers a company keeps, over a given timeframe, as a percentage of all customers they attract. Subtracting your retention rate from 100% gives the percentage of customers a brand is losing over that timeframe, also known as the brand's "churn rate."

Return on Investment (ROI)

A performance metric that seeks to compute the total value of an initiative relative to its total costs. To calculate ROI for a given initiative, divide the

sum of all its benefits (or return) by the sum of all costs, and express the result as a percentage or a ratio.

Segmentation

The practice of using compiled data to group users with similar attributes, preferences, or behaviors into more easily managed segments that can be targeted as groups.

Send-Time Optimized Scheduling

The process leveraging machine learning to automatically send messages during a customer's high-engagement window, after analyzing a user's past interactions.

SEO/Landing Page Optimization

The practice of ensuring a landing page is designed to be effective at drawing in relevant customers organically through search engines like Google. Good SEO techniques include best practices (such as short, uncluttered copy) and the inclusion of frequent mentions of the keywords that data shows a brand's customers employ when they search.

Software Development Kits (SDKs)

An SDK is a collection of all the basic assets a programmer would need to code a certain kind of software, code they can then customize and adjust for their company's or client's specific needs.

Statistical Significance

The best practice of producing reliable data-based conclusions by first ensuring that the results obtained from the data are statistically meaningful. Safeguards to ensure results are statistically significant include using a large enough sample size and allowing a long enough time window for testing. A random sampling of three NYC students in which all three happen to be male might lead to a false conclusion that all NYC students are male, because the sample size is not statistically significant.

Stickiness

The degree to which a digital experience engages customers and keeps them engaged.

Time-Based Scheduling

The practice of sending all users a notification at the same time (often correcting for time zones), usually around a real-world event such as an international holiday.

Transactional Campaigns

Communication events that provide immediate customer value and encourage future engagement, such as password-reset reminders and order-tracking updates.

User Profile

A small dataset in which a brand stores a single user's personal information, history of brand interactions, communication preferences, and other data. User profiles help characterize individuals so they can be segmented and targeted more effectively and efficiently.

Webhooks

A webhook (also called a web callback or HTTP push API) is a way for separate apps or platforms to communicate efficiently and provide one another with live data that can trigger automated productive brand action including customer communication.

Word of Mouth

An extremely valuable type of referral wherein trusted sources (such as a potential user's friends and family) are leveraged to create a positive impression of a brand or service.

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