



The New Rules of (Multi-Channel) Customer Engagement: Handbook for Growth Marketers





Table of Contents

- 1** What is driving the shift to customer-centric marketing? **Page 1 to 2**
- 2** The 5 new rules of engagement in a multi-channel world **Page 3 to 8**
- 3** Conclusions and takeaways **Page 9**



Section 1

What is driving the shift to customer-centric marketing?

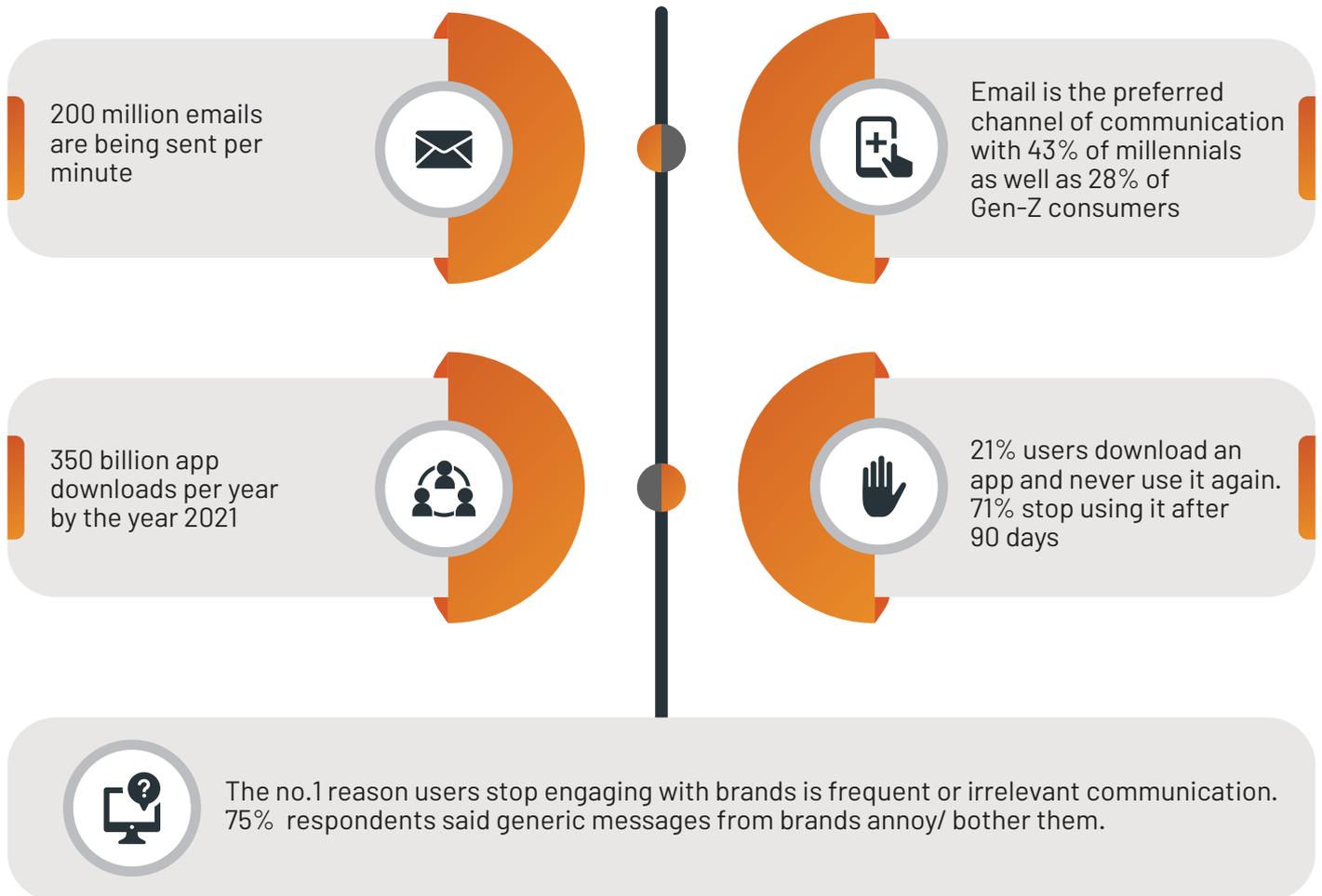
Customers today expect brands to deliver a balance of relevance, consistency and convenience at each stage of their journey, across the multiple channels and devices where they choose to engage. To meet this expectation and optimize customer lifetime value in a multi-channel world, growth marketers are shifting from the somewhat fragmented 'campaign to convert' approach to a more connected, sustained 'engage, convert & retain' approach.

Here are 3 characteristics of that shift:

- 1. From channel-centric to customer-centric approach:** instead of designing campaigns in silos, based on the channel (email, sms, display etc.), marketers are designing sustained contact with a customer based on their buyer journey, irrespective of the channel. They recognize that they don't have to be on all channels all the time - just when and where it suits the customer best. Prioritizing channels that matter most to customers in their unique journey drives both - sustained engagement and marketing efficiency.
- 2. From fragmented interactions to engaging in the 'moments that matter':** from rule-based campaigns, marketers are evolving to an increasingly dynamic, context-driven approach to deliver the right message at the right time, through the right channel. Engagements are increasingly based on specific trigger behaviour or events that occur at decisive 'moments' in the customer's journey.
- 3. From conversion to retention and customer lifetime value (CLV):** while campaign conversion is still an important metric, one-time conversion alone is insufficient to drive sustained revenue. They are adding metrics such as retention and lifetime value to their KPIs to measure the effectiveness of engagement that is able to move buyers forward in their journey.

Where this eBook can help

If you are a growth marketer starting your omni-channel engagement journey, this eBook will help highlight some critical considerations and real examples to approach the challenge more purposefully, and drive both - operating efficiencies and marketing effectiveness.



Omni-channel marketing is a challenge, but also an opportunity!

- 80 percent of respondents shop on their mobile phones
- 74 percent were 'excited' to receive notifications from retailers about offers/ sales
- Two-thirds of respondents said they open emails from brands they believed contained product deals or sales
- 46 percent of respondents said that they've bought a product because it was shown in an app or sent in an email
- About two-thirds of respondents that make \$150,000 or more annually plan to do most of their holiday shopping online this year

These findings are from a survey of over 1000 online shoppers in the United States in October 2019. Survey courtesy: Leanplum. [Read the full survey here.](#)



Section 2

The 5 New Rules of Engagement in a Multi-channel World

The staggering complexity of engaging customers across an array of channels, platforms and devices compels us to prioritize for optimal efficiency of course; but also to minimize the noise that assails customers at every step of their journey and drive engagement beyond the first conversion. As the findings of [this survey](#) show, more information does not necessarily mean more engagement.

Customer-centric multi-channel marketing is about relevance, effectiveness and efficiency. As you begin planning towards those objectives, keep these five new rules of engagement in mind to guide your journey.

The 5 New Rules of Engagement in a Multi-channel World

#1

Redefining Engagement:

Conversion is only the first step
Retention and sustained revenue are the real goal

#2

Revisiting Personalization:

Forget what it means to you, think about
what it means to your customers

#3

Activating Customer Data:

Empowering marketers to leverage data
independently

#4

Mastering The New Metrics:

Are you measuring true engagement?

#5

Going Multi-channel on Mobile:

Is your mobile strategy designed for engagement?

#1

Redefining Engagement:

Conversion is only the first step. Retention and sustained revenue are the real goal

Sustained revenue demands that brands engage and retain users with the goal of monetization and improved customer lifetime value (CLV). This holds true whether you market a B2B SaaS solution or run a dating app. While the first-time click, download or even transaction is hard enough amidst all the noise and clutter competing for customer attention, it does not necessarily reflect true engagement with the brand. Getting customers to commit to ongoing relationships via repeat purchases or signing up for paid subscriptions beyond the free trial is what drives sustained monetization, and is the true test of effective customer engagement.

The new rules of engagement require us to:

- Understand customer preferences and behavior to deliver relevant interactions in the moments that matter, through their life cycle
- Continuously test and fine-tune messages across audience segments, journey stage, timing, channels and devices
- Connect the dots between campaigns to deliver consistent experiences and engagement, with the goal of turning one-time users into regular customers

LOVOO	Global social networking app	
Challenge	Identify which campaigns and offers work best to convert, engage and retain subscribers from activation to retention and monetization	
Goals	<ul style="list-style-type: none">• Engage users to install app and complete the registration process• Convert registered users into subscribers at the end of the free trial period• Drive in-app purchases by engaging less active users	
Method	<ul style="list-style-type: none">• Test multiple channel, offer and campaign mixes to identify optimal offers and campaigns that convert• Use analytics to reveal how customers engage differently with campaigns and offers	
Outcomes	<ul style="list-style-type: none">• Subscriptions increased by double-digit percentage• Additional revenue from in-app purchases and country-specific campaigns• Won Google's Fan Favorite App in 2018 for its country-specific offers	

[Read the full case study here](#)

#2

Revisiting Personalization:

Forget what it means to you, think about what it means to your customers

Personalization is about delivering relevance to customers, especially in the decisive moments that matter. Does 'the moment' demand an offer, just information, or even no contact at all?

The right interaction at the right time is the kind of personalization that invites customers deeper into the relationship, with minimal effort. In this webinar about '[in-moment marketing](#)', Forrester analyst Thomas Husson calls it 'reducing the cognitive load' on the consumer and making it as easy as possible for them to make a favorable decision.

The new rules of engagement require us to:

- Reduce consumers' 'cognitive load' by understanding the context in which they want to interact with the brand. Personalization is about using data and insights to anticipate customer needs and predict what they're likely to be interested in at a particular moment, for the best outcome from that interaction
- Use rigorous testing and optimization to identify the right channels and right moments: understand how people react to specific push notifications, specific promotions, messaging at different times and devices, dynamic pricing plans etc.

AFTERPAY	A loan-free, tech-enabled 'buy now, pay later' platform for retail customers	
Challenge	<ul style="list-style-type: none">• Move new acquisitions to long-term relationships with onboarding and first purchase• Grow repeat purchase revenue with optimal customer engagement	
Goals	Drive revenue from engaged users	
Method	<ul style="list-style-type: none">• Harness data to better understand customers' needs and wants• Engage with them on mobile and web with timely, personalized experiences at scale	
Outcomes	<ul style="list-style-type: none">• Higher user activity led to higher ROI• Created more innovative interactions between Afterpay customers and the growing ecosystem of Afterpay-enabled merchants	

[Read the full case study here](#)

#3

Activating Customer Data: Empowering marketers to leverage data independently

Customer data management begins with collecting and creating a unified set of customer data from various sources, but this task is often managed by IT and doesn't bring marketers much closer to using that data in effective ways for customer-centric marketing. For that, marketers need to be empowered enough to:

- Easily and independently access customer data
- Surface insights from the data
- Activate that data to run orchestrated campaigns

Not only will this level of access to data and insights help marketers stay in control of customer engagement without over-dependence on IT, it also helps new use-cases emerge that present opportunities to build deeper engagement.

The new rules of engagement require us to:

- Create a data strategy where the systems of data unification, systems of insights (analytics) and systems of engagement (activation) are deeply integrated, and can be accessed independently by marketing
- Identify practical tools and platforms for marketing that can help do that natively, out of the box, for scale, agility and efficiency

COUNTABLE	Civic technology company powering political engagement with personalized content and action recommendations	
Challenge	Empower Countable to empower their users with purposeful civic engagement	
Goals	Enable personalized multi-channel engagement at scale	
Method	<ul style="list-style-type: none">• Test effectiveness of keyword placements, use of emojis, and rich push notifications to keep users coming back to the platform• Use A/B testing and analytics to identify optimal communication channels	
Outcomes	<ul style="list-style-type: none">• Countable's editorial team can now accurately evaluate which messages resonate with users and which don't• Enabled 36 million civic engagements with personal, meaningful and actionable engagement	

[Read the full case study here](#)

#4

Mastering The New Metrics: Are you measuring true engagement?

Since campaigns are no longer defined or confined by the channel alone, KPIs have moved beyond the traditional channel-specific metrics such as opens, clicks, etc. As growth marketers aim to create value through conversion, engagement and retention across multiple channels, they need a full view of what is working across the connected campaigns. This means surfacing impacts that matter in both - ongoing campaigns as well as interaction over the customers' lifetime.

The new rules of engagement require us to:

- Surface insights that help measure engagement metrics such as usage drops, conversions decline, user churn, app uninstalls, retention rate, optimal customer lifetime value etc.
- Manage trade-offs between competing priorities like short-term revenue goals and long-term engagement metrics
- Avoid a possible mismatch between expected outcomes and KPIs. One of the challenges with measuring engagement in a multi-channel campaign environment is a possible mismatch between expected strategic outcomes and tactical KPIs of each contact or campaign. For example, marketers may set out to impact customer experience with a customer-centric strategy, but their KPIs are still around traffic, downloads, installs; not engagement, retention or satisfaction.

TED	Nonprofit global community devoted to spreading ideas	
Challenge	<ul style="list-style-type: none">• Improve usage metrics such as engagement and frequency of use (of the mobile app)• Build a one-on-one relationship with each member of TED's digital audience	
Goals	Increase frequency of talk views via messaging on iOS and Android platforms	
Method	<ul style="list-style-type: none">• Develop curated messaging with notifications about relevant new content and weekly favorites• Build a locally relevant end-to-end app experience for its global audiences• Run additional thematic and time-based campaigns with ongoing A/B testing for optimization	
Outcomes	<ul style="list-style-type: none">• Higher relevance of notification content led to a 72% higher than average open rate• A reduced (lower than average) app uninstall rate• TED's editorial and product marketing team can now run sophisticated campaigns to increase key metrics, without relying on developers	

[Read the full case study here](#)

#5

Going Multi-channel on Mobile: Is your mobile strategy designed for engagement?

Customers - both B2B and B2C - are increasingly accessing more channels and doing more via their mobile. From messaging, social media, browsing, email or apps, mobile is fast becoming the growth-marketers' gateway to multi-channel marketing. Engaging customers on mobile may need a different approach because the notion of 'context' - which has changed marketing - may have its own nuances when it comes to addressing consumer behaviour on mobile. Being dynamic and contextual on mobile needs marketers to integrate elements of both - location and real-time - into the mix to make the most of the engagement opportunity offered by mobile.

The new rules of engagement require us to:

- Understand what our consumers' mobile journey is like. For example, a stat that tells us a majority of our prospects and customers use smartphones does not necessarily imply that we need to develop a mobile app. Email may still be the most used channel, albeit now accessed primarily via mobile.
- Ensure that messaging formats themselves are optimized for a mobile experience. For example - the way consumers engage with email over mobile may be different from the way they engage with it over the desktop or PC. Everything from the website browsing experience to video content needs to be designed - not just adapted - for true mobile engagement.

AppAnnie	AppAnnie delivers app data and insights for businesses to succeed in the global app economy	
Challenge	Introduce products changes with minimal adverse risk to existing user behaviour ('My Data Manager' app has over 11.5 million downloads) while quickly onboarding new users	
Goals	Run mobile A/B testing to minimize risk on product changes	
Method	<ul style="list-style-type: none">• Manage tests for a large existing user base with speed and flexibility• Get holistic view of user behaviour and responses• Measure against a wide variety of different metrics• Gather actionable data to make incremental improvements in each product iteration	
Outcomes	Statistically significant test outcomes that directly impact business outcomes	

[Read the full case study here](#)



Section 3

Conclusion and Takeaways

As shopping online and via mobile devices quickly becomes the new norm, personalized communication becomes even more crucial to brand success.

1. In the age of experience, marketers are seeking engagement beyond the first interaction and conversion. Growth marketers want to see these **engagements directly impact revenue** with strategies that effectively and efficiently convert users into paying subscribers or loyal customers.
2. **Personalization is all about relevance.** Consumers have a preference for when and how they would like to receive messages from retailers. It is imperative retailers communicate with their consumers regularly regarding topics that are useful to them and in the form that they are most comfortable engaging with, to ensure consumer satisfaction and retention.
3. An **easy-to-access and use data and insights system** empowers marketing to independently run customer engagement strategies with speed and agility. Marketers are seeking out-of-the box native systems that help activate the data to run dynamic and contextual campaigns. It is about owning customer engagement minus over-dependence on IT.
4. The complex multi-channel environment brings **complex new related and unrelated metrics** that marketers need to understand to get a holistic picture on how connected campaigns are performing in the context of not just conversion but sustained engagement.
5. **The smartphone is fast becoming the growth marketers' gateway to multi-channel marketing.** Customer engagement over mobile devices needs a different approach starting with a deep understanding of how customers respond to mobile marketing messages. New elements of 'context' such as location and real-time help to make the most of the engagement opportunity offered by mobile.



The average consumer has about 40 apps on their phones that they use, even though they download 80. There's a lot of opportunity for engagement, but it really requires a mind shift in terms of how consumers are actually engaging.

- Momchil Kyurkchiev, Co-founder, Leanplum



About MarTech Advisor

MarTech Advisor is a leading digital resource for unbiased news, in-depth research, expert views and perspectives on the constantly evolving marketing technology space. MarTech Advisor facilitates the modern-marketers' digital transformation journey and helps them succeed. Our community of over a million professionals includes highly engaged thought leaders, marketing experts, and practitioners looking to create business impact with martech. MarTech Advisor is a part of Ziff Davis B2B, one of the fastest-growing online business and technology media companies in the world.

About Leanplum

Leanplum, the leading multi-channel engagement platform helps forward-looking brands like Zynga and Tesco meet the real-time needs of their customers. By transforming data into an understanding of users' needs and wants, our platform delivers unified experiences that are timely, tested and relevant – building customer loyalty that fuels business growth.

Founded in San Francisco, Leanplum has offices across North America, Europe and Asia, and has received more than \$98 million in funding from leading Silicon Valley venture capital firms. Leanplum has also been recognized as Fortune's Best Companies to Work For and Entrepreneur's Best Entrepreneurial Companies in America. Download the media kit and learn more at www.leanplum.com.

