Ready-to-Use **Omnichannel Marketing** Workflows To Grow Conversions

Use omnichannel workflows to put your customer engagement on autopilot and accelerate growth

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What are
Marketing Automation Workflows?

In the world of technology, where your competitor is just a click away, winning a customer is only one part of the battle

won. There is a lot more you need to do to in order keep them on your platform. Engaging customers throughout their journey means executing different activities right from onboarding new users to engaging existing customers to leverage them for referrals.

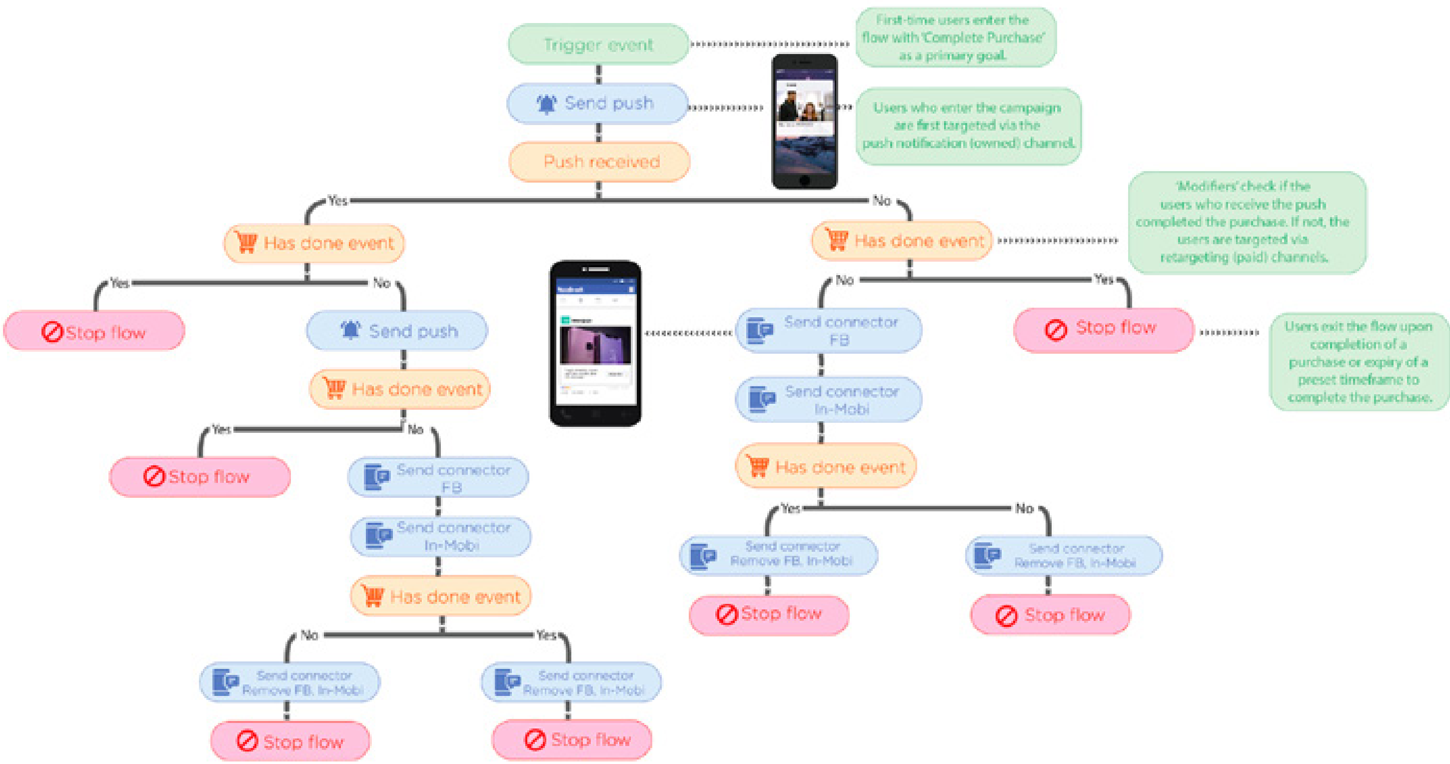
Throughout the customer journey, you'll need to perform certain activities in order to onboard, engage, and retain your customers. You can either individually execute each activity for every new customer or put them on autopilot. Marketing Automation Workflows help you with the latter.

Instead of following each customer throughout their journey and engaging them with several one-off messages, you can create robust flows that work according to predefined logic. This creates a self-sustaining customer engagement engine.

We have put down together this eBook to show how you can use workflows to automate your customer journey activities.

We'll focus on four stages of the customer journey:

Onboarding	Engagement	Retention	Loyalty
Transition the customer past the initial attraction.	Begin to hook the customer in.	Attract and delight your new customers.	Convert customers into brand advocates.



Why Do You **Need Workflows?**

To understand this, let us give you an example of Tokopedia.

Tokopedia is one of Indonesia's largest online marketplaces with a user base of over 75 million active users. Tokopedia used to have a high rate of user churn, with nearly 60% of the users uninstalling the app within the first month. They decided to improve the first-month user retention by using an integrated customer onboarding strategy.

They identified the various steps in user onboarding to deliver the right message at the right time and to reduce ambiguity.

Tokopedia created a series of integrated cross-channel campaigns that targeted users with messages across owned and paid channels such as Push, Email, SMS and Ad-retargeting. Tokopedia was able to improve first-month user retention by a whopping 60% and increase the first-purchase rate by up to 20%.

All Tokopedia needed to do was visualize how they could leverage various touchpoints in customer onboarding to engage and retain the customers. Imagine the amount of time and money that marketers at Tokopedia would have to put in had they done these activities manually. That's the advantage of using a workflow. It simplifies the marketing operations for the marketers.

Workflows also offer several other benefits that include:

MINIMIZE USER ATTRITION AND IMPROVING CUSTOMER LTV: As in the case of Tokopedia, marketers were able to identify the touchpoints that they could use to deliver the right message at the right time. This helped them to engage the customer and minimize first-month attrition by 60%. Besides reducing user attrition, you can also use workflows to improve customer LTV by engaging and re-engaging with customers at every stage of the customer journey. Fave, an award-winning deals and discounts platform, used automated workflows not just to drive first purchases, but also re-engage with those who completed a purchase using push notifications. The result was a 2X increase in LTV.

SAVE TIME AND COST: With the help of a workflow, you can put all the activities in each stage of the customer journey on autopilot. This will save your time to focus on strategic initiatives and creative activities. Putting your activities on autopilot also reduces the cost incurred due to human errors and lengthier time to market.

OFFER CONSISTENT EXPERIENCE ACROSS CHANNELS: According to the Interactive Advertising Bureau (IAB), **90% of consumers show high purchase intent** when they receive a consistent experience across different channels. However, research reveals that nearly half of the retailers face challenges visualizing data in a centralized way. This can make it difficult to create a consistent experience across channels. With workflows, you can craft unique offers and messages for each channel, and deliver a consistent experience to the users. Take Kredivo, for instance. This Indonesian fintech company used workflows to send customized offers and messages to users via emails and push notifications. The relevant messaging and the consistent experience helped Kredivo to increase their conversions by 40% within ten months.

DELIGHT YOUR CUSTOMERS: The great Warren Buffet once said, "It takes 20 years to build a reputation, and five minutes to ruin it." A happy customer will be the one who will boost your reputation and get you more customers. So, use this opportunity wisely to delight your customer at every stage. Use workflows to ensure that your customer has a positive experience not just during conversion but also during onboarding, retention, and the exit stage.

How To
Build Workflows?

Now that we have introduced workflows and their key benefits let's get down to doing some actual work. In this section, we'll talk about building automation workflows using a marketing automation platform. While creating a new Flow, you first need to set a goal. We've included it right after the name to keep you focused on the desired outcome.

Pro Tip

Before you start to create the actual Flow, draw it out on a whiteboard/chalkboard or a sheet of paper. It's not important how it looks but pay attention to the logical flow.

One Mo Tip

If you're a MoEngage customer, you can engage users across channels like push, email, SMS, and in-app. You can add campaigns for different channels and design the Flow to reach out to users based on their channel propensity.

Once you get to the Flow canvas, you can start putting together the building blocks for the flow.

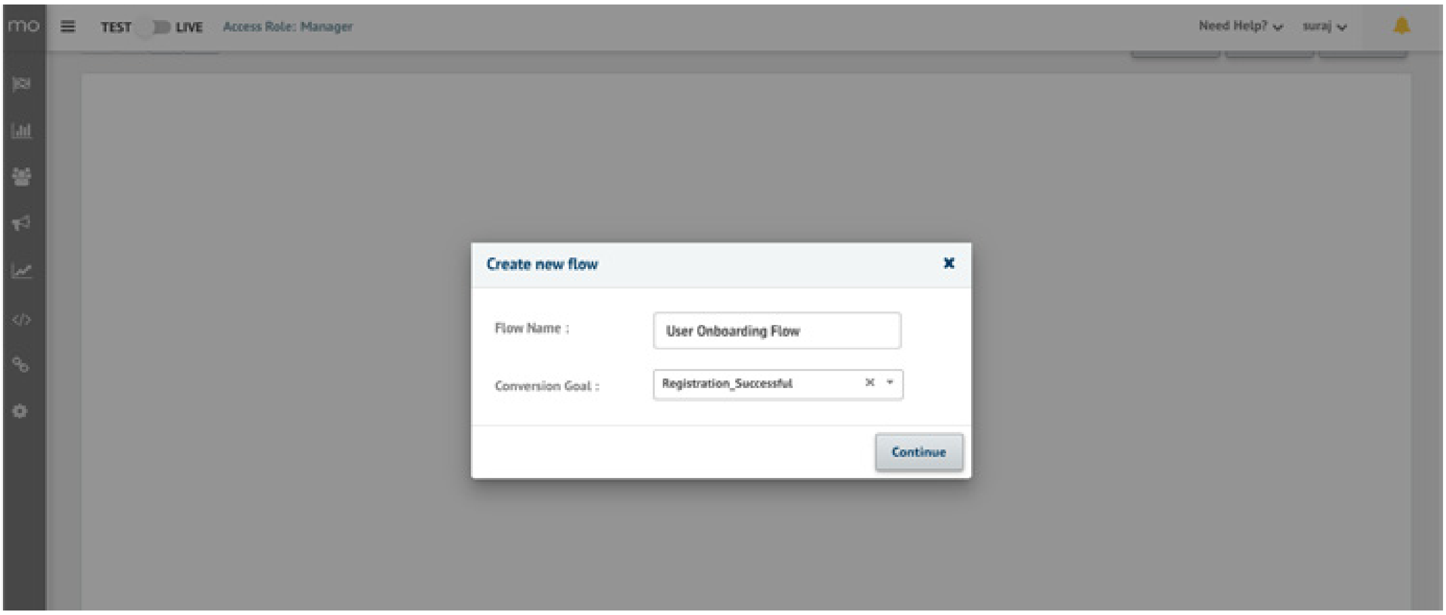
There are four stages to setting up workflows. They are:

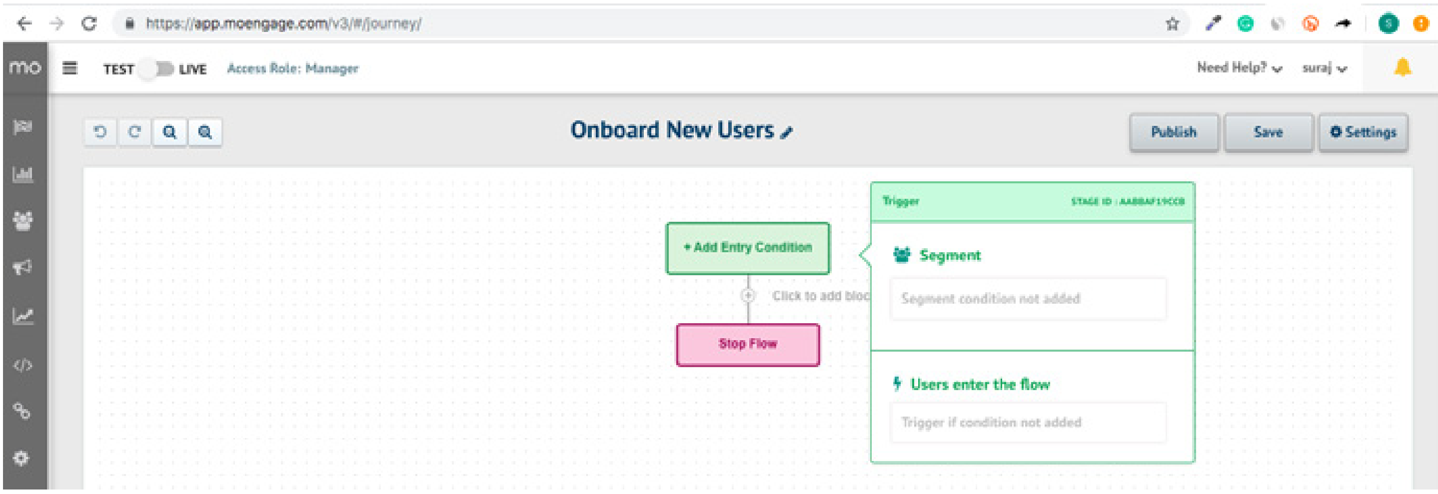
Entry Condition | **Actions** | **Campaign Conditions** | **Flow Controls**

Let's go over each one:

Entry Condition

The entry condition defines who gets added into the journey and when. This means that only users who satisfy the entry condi-tion will be allowed to enter the flow. You can segment the users based on user events or properties. For example, you can enter users who have "Last known city" as Chicago and have not executed "Made Purchase" in past 30 days, into the Flow 2 hours after they open the App again.





Note: Segments are refreshed at regular intervals. Hence a user may take up to 45 to 60 minutes to be correctly evaluated under segment condition.

Actions

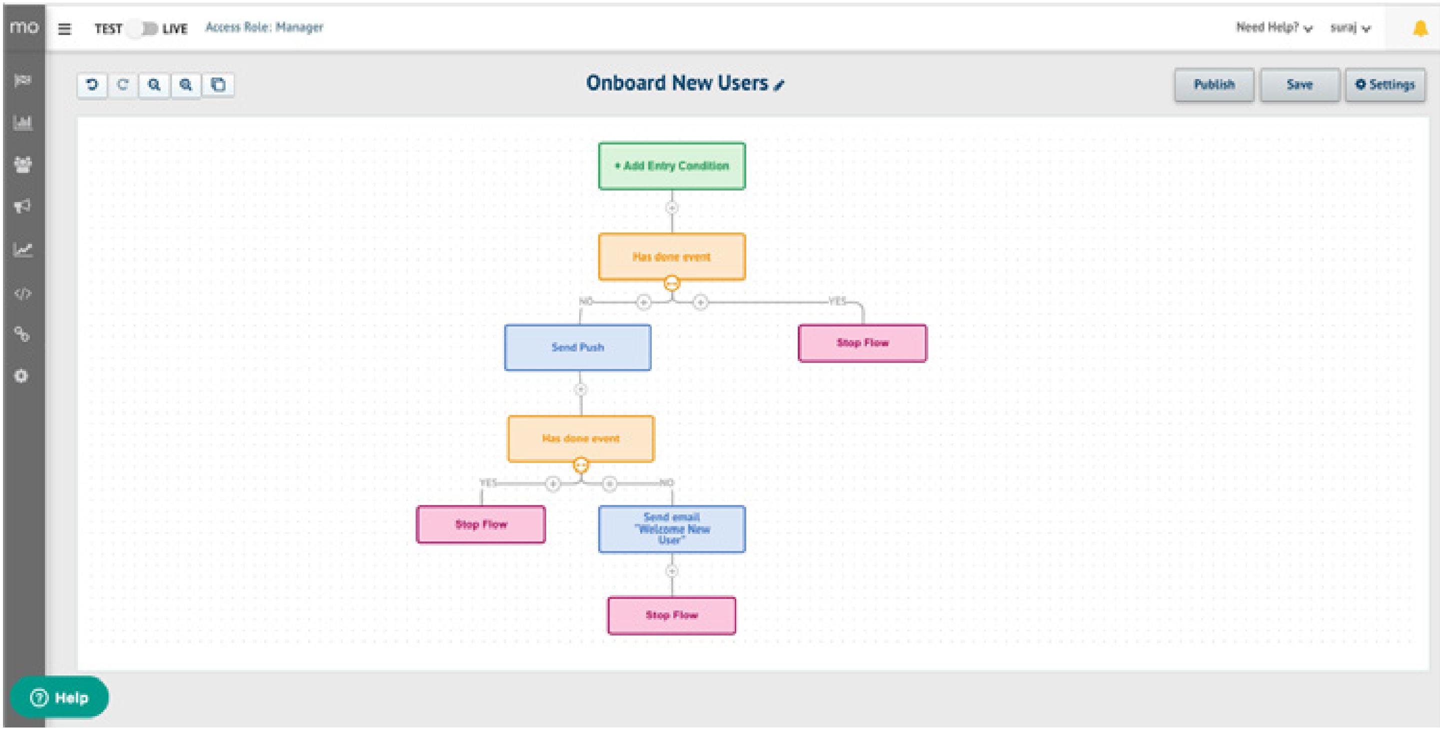
The next step is to determine the action to be taken when the user enters the flow

Send Push: Marketers can send personalized push notifications to the users based on user attributes. They can also import the message from an existing campaign using the campaign ID.

Send Email: Marketers can send emails to the user on their active email ID used for subscription. They can either personalize the email message based on user attributes or import it from an existing campaign using the campaign ID.

Send Connector: When a user comes to this stage, you can send a connector request as per user data to the chosen connector end-point.

Send SMS: An SMS is sent to the user as per the SMS settings when they enter this stage. You can personalize your SMS message using personalization. However, before you use SMS in your flows, ensure that you have configured the SMS settings.



Conditions

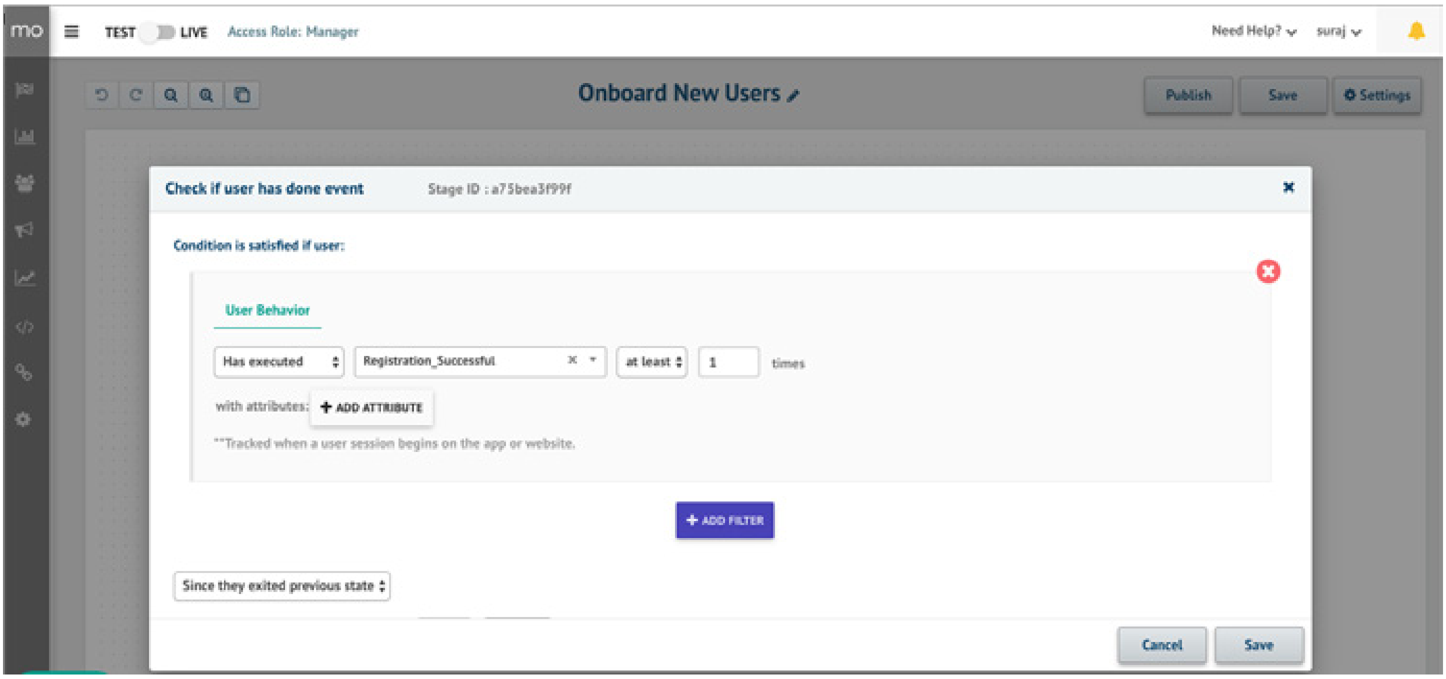
Conditions are always evaluated within a certain time range starting from the time when the user moved to this stage from the previous stage to the time set by you in condition.

'Has done event' Condition

It evaluates whether the user has completed a certain event/action (or a combination of them) basis which marketer may direct them to different treatments/paths in the Flow. For example, if your user comes to event condition evaluation after viewing a product page, and if you want to check if the user has added the product to the cart and made a purchase within 2 hours, the system will automatically check for the next two hours if the condition has been fulfilled. If the condition is fulfilled, it will move the user to the 'Yes' branch, if not, it will move them to the 'No' branch.

'Check attribute' condition

Evaluates whether specific user attribute (or a combination of them) is set as the required value. You can

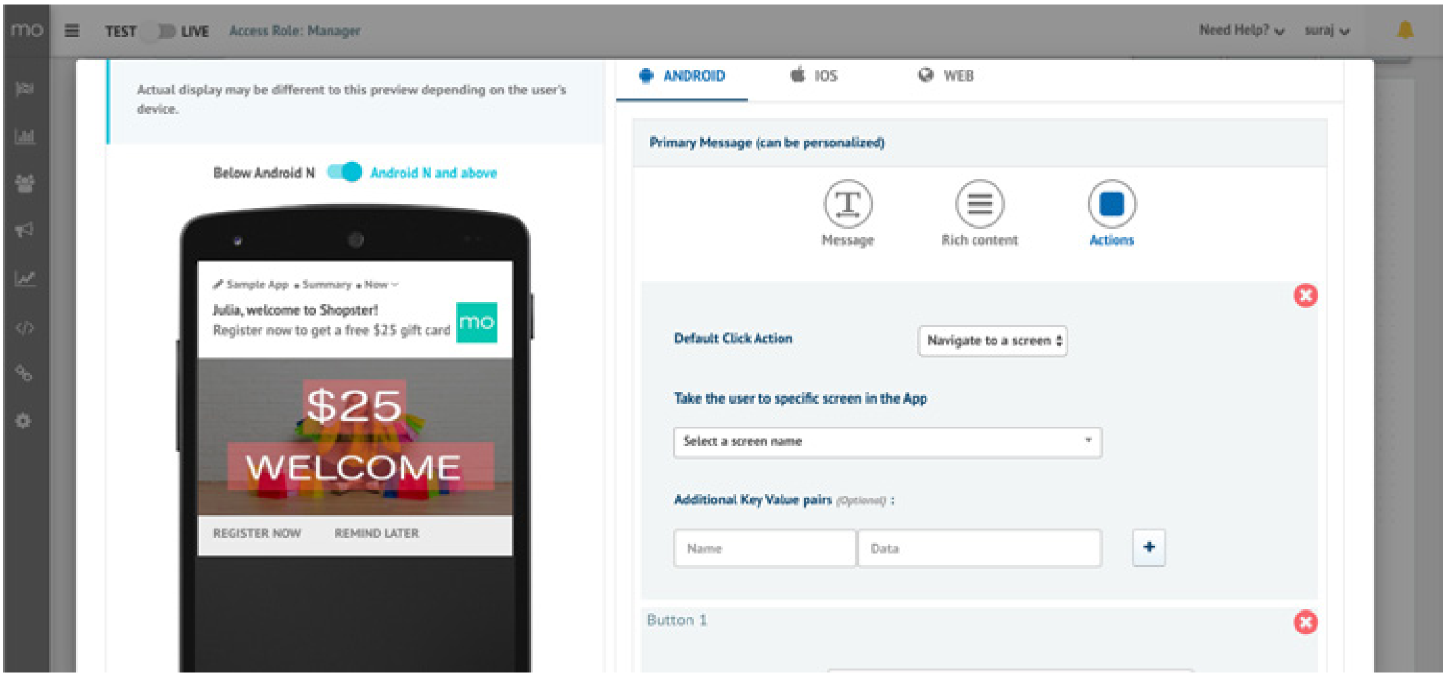


Campaign Conditions

The next step is to check the campaign conditions, which includes:

Emails: This gives you details such as whether the user has opened the email message, clicked the email message, unsubscribed from the list, and whether the email was marked as spam, hard-bounced, or not sent because of previous hard bounces, spams, or complaints from the user.

Push: It allows you to check if the user has received the push notification, dismissed the received push notification, or has clicked it. Note: The updates on receiving and dismissing push notifications are valid only for Android.



Flow Controls

Control blocks are placed in journeys to control the flow, i.e. to add required time delays or connect the current stage to any other stage in the same Flow.

You can add controls to your workflow such as:

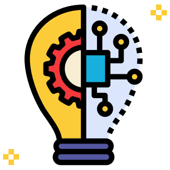
Add Wait time: The system will wait for the configured time before taking the succeeding action. During the wait time, the system will not evaluate any condition or take any action. It is mainly used to delay the communication by days or hours once the user becomes eligible to receive any communication.

Go To: This option will let you send your users to any existing stage in the same Flow.

Best Practices To Use
Workflows In Marketing Automation

How to make Workflows more effective?

Now, before you begin to create a workflow for your campaign, here are four best practices that you must know to run flows effectively.



Define the right metrics

Before you create a workflow, define the outcome you plan to achieve through it. Is the purpose of the workflow to create awareness about a new product launch or is to drive conversions? A clearly defined metric will help you create a watertight workflow for your campaigns.

Keep the customer journey at the center while planning the workflow

Understand where the user is in the buyer journey and craft your messages accordingly. For example, new users on a shopping app may be drafted into a flow that encourages them to register, check out the products or collections, and complete a purchase. Likewise, a frequent user of the same app can be targeted with product recommendations that complement their past purchases. Inactive users can be targeted with coupons/discounts that encourage them to come back to the app.

Identify the right channels & frequency to deploy the campaign

Create flows that reach users only during the best times with your message on the right channel. Maintain sufficient time delays between communications. Identify the best channel for each type of communication or message. For example, if you want your user's immediate attention, a push notification would work better than an email. Optimize CPT metrics (Cost of reaching users) by first reaching users on push/email channels before retargeting them using third-party paid channels such as Facebook.

Always experiment, analyze, & iterate to achieve the goals

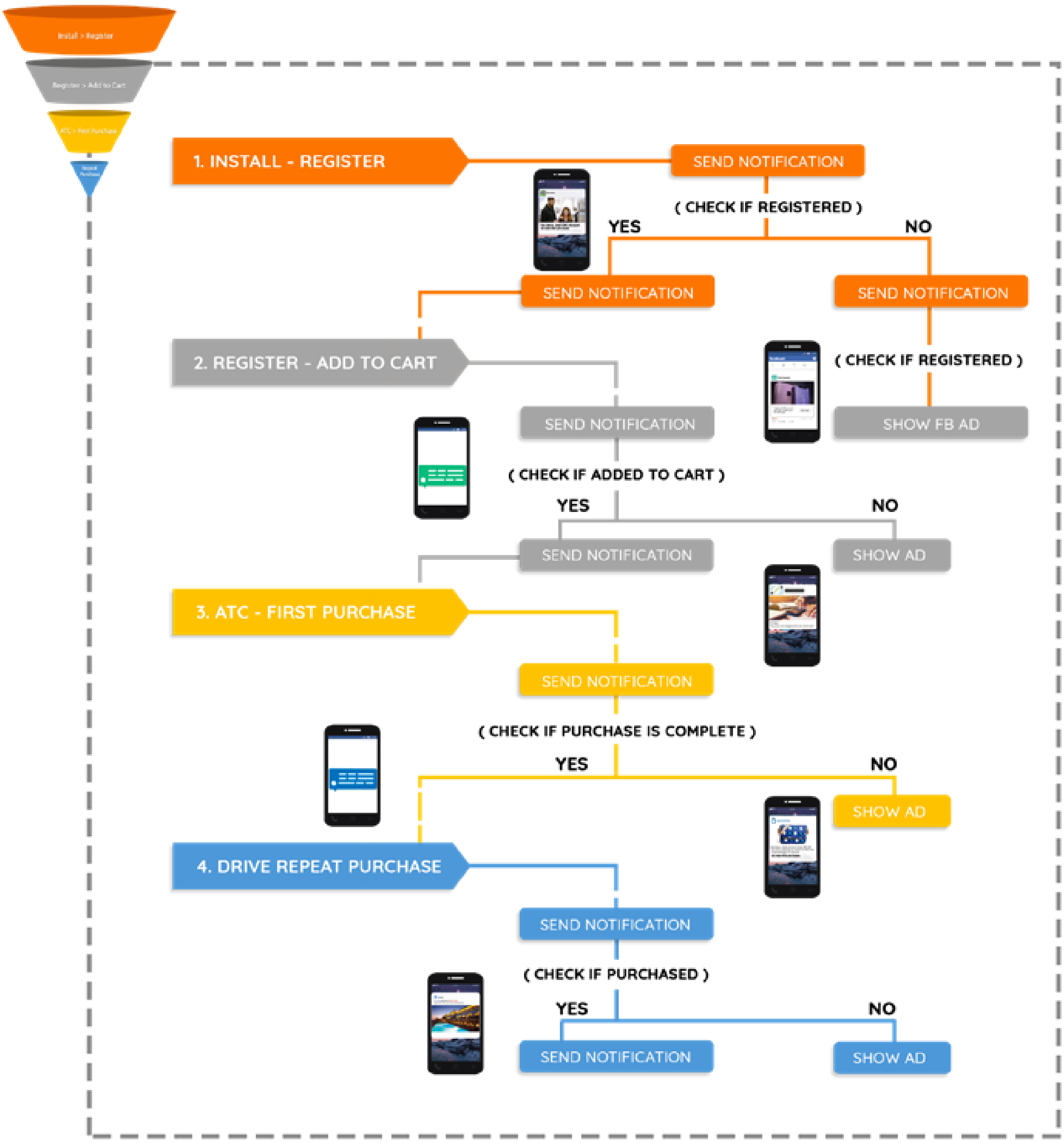
You can use workflows to solve pain points (think 'Cart abandonment'), improve KPIs (think 'DAUs'/'MAUs'), or achieve end-goals (think 'Completed transactions'). No matter what your goal is, always experiment and do an A/B test to know what works well for your campaign. Measure the results in real-time, identify what can be improved in your campaign, and make regular iterations to achieve your goal.

Best Examples of **Workflows We've Seen**

1. Onboarding: How to drive activation and product adoption using aha moments

Once your customer installs your app, you have to guide them through the next steps to enable easy product adoption. An onboarding workflow like the one given below can help you to visualize and implement the onboarding process. From setting triggers to sending welcome emails or push notifications to deciding upon the next steps based on the action taken by the user, you can determine the onboarding process for your customer.

User Onboarding Workflow:



Tokopedia used a similar workflow to onboard their customers, which resulted in a 60% uplift in retention and a 20% increase on first-purchase transactions.

If you're a marketer for an e-commerce platform, especially one that has a strong mobile presence, this is a must-have Flow on your list. Tweak it to suit your customer engagement strategy and target audience, and watch as it drives increases in revenue.

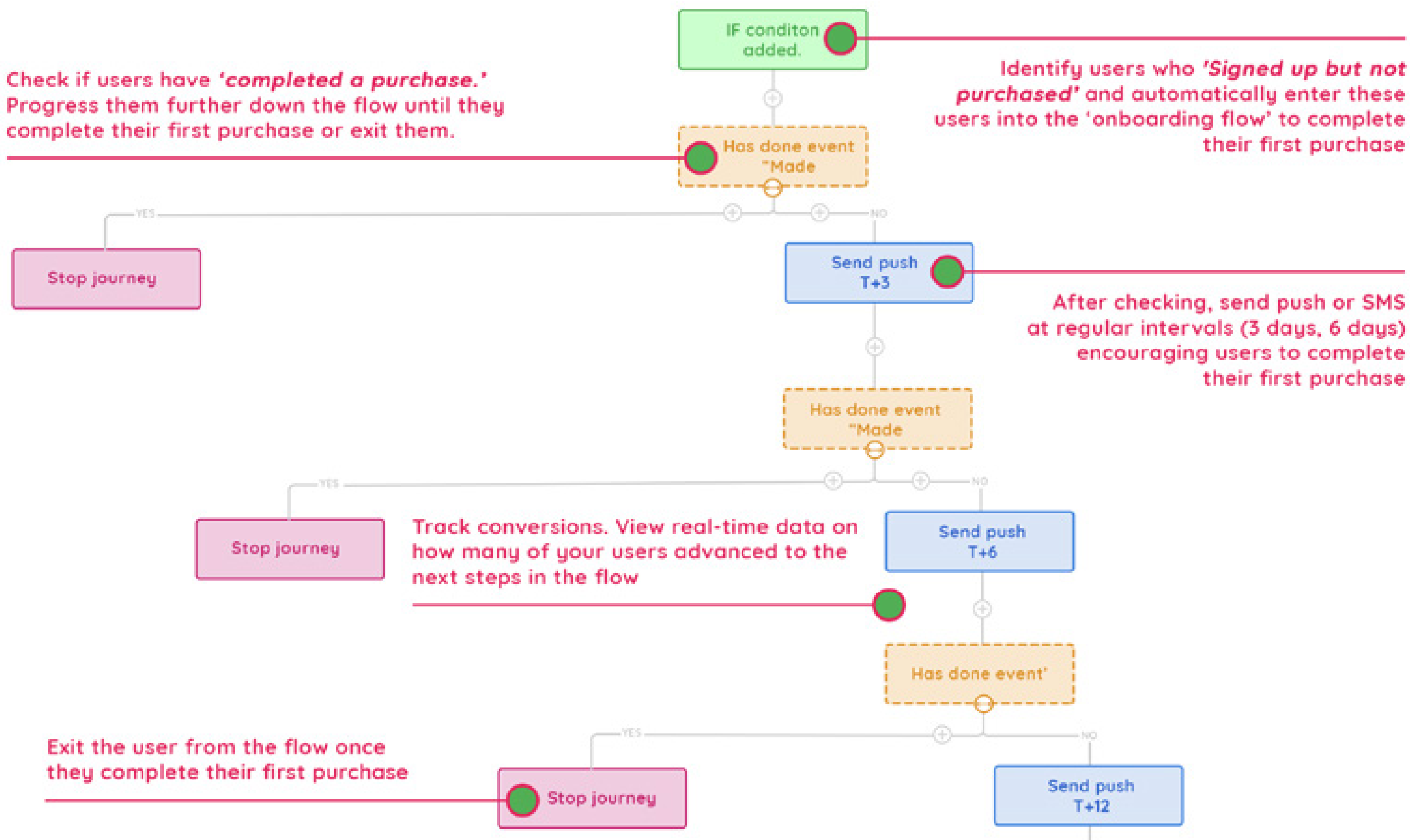
One Mo Tip

If you're a MoEngage customer, you can set your campaigns to be optimized on the fly. Set an A/B test and enable Sherpa to automatically drive the better performing variant as the campaign progresses.

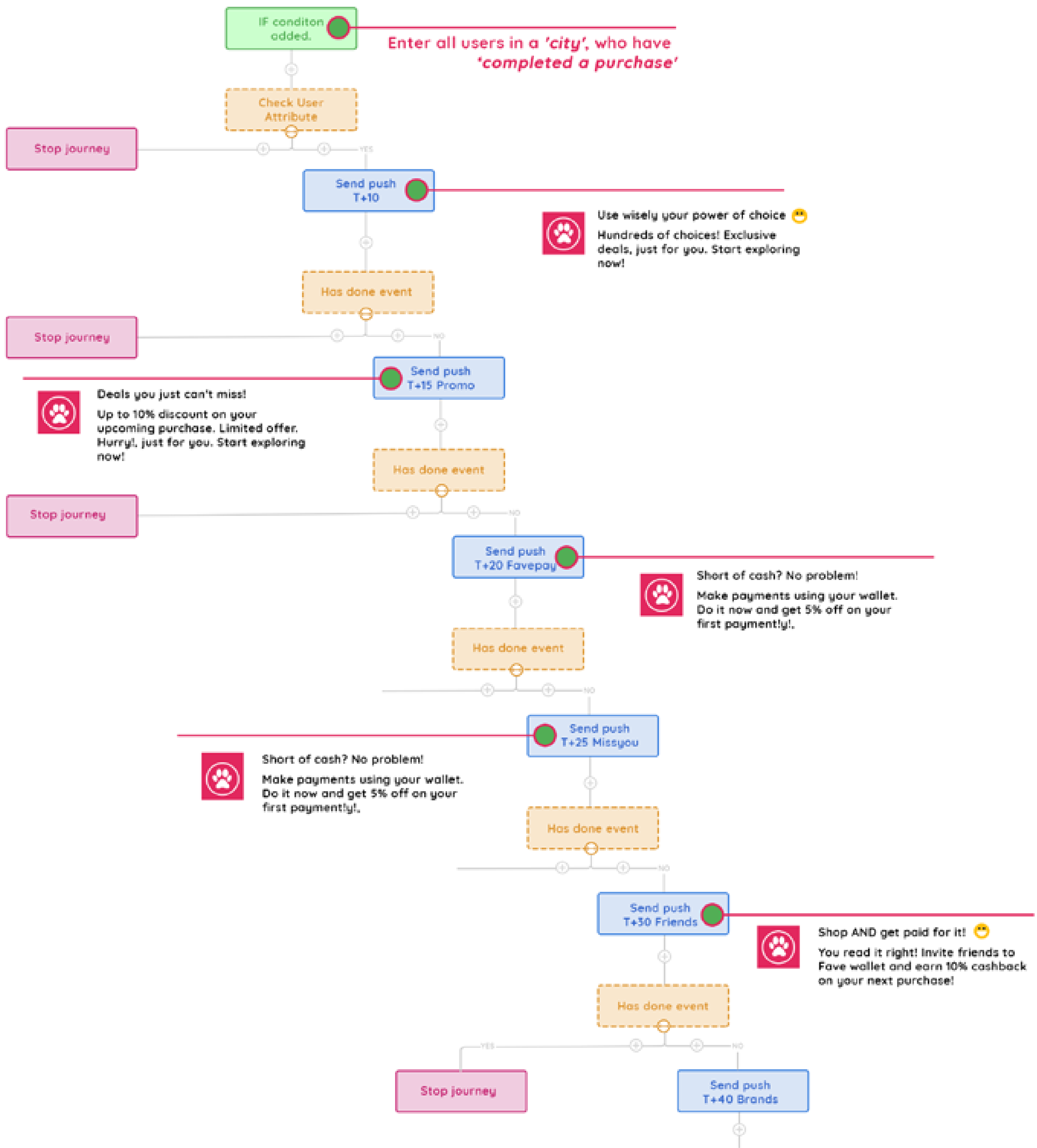
2. Engagement/Re-engagement: How to keep your customers engaged and re-engaged

In a survey conducted for mobile apps, 55% of the app marketers revealed that they were facing challenges in retaining and engaging users. Keeping a customer engaged on your platform after the first purchase can be quite a challenge. A workflow can come handy to help you plan your customer engagement and re-engagement activities. From detecting and reaching out to new users via SMS and push notifications to triggering push notifications to inform about new arrivals and product launches to first customers, you can create workflows like the ones given below to make customer engagement and re-engagement more meaningful and personalized for your customer.

First-purchase Engagement Workflow:



First Buyer Re-engagement Workflow:



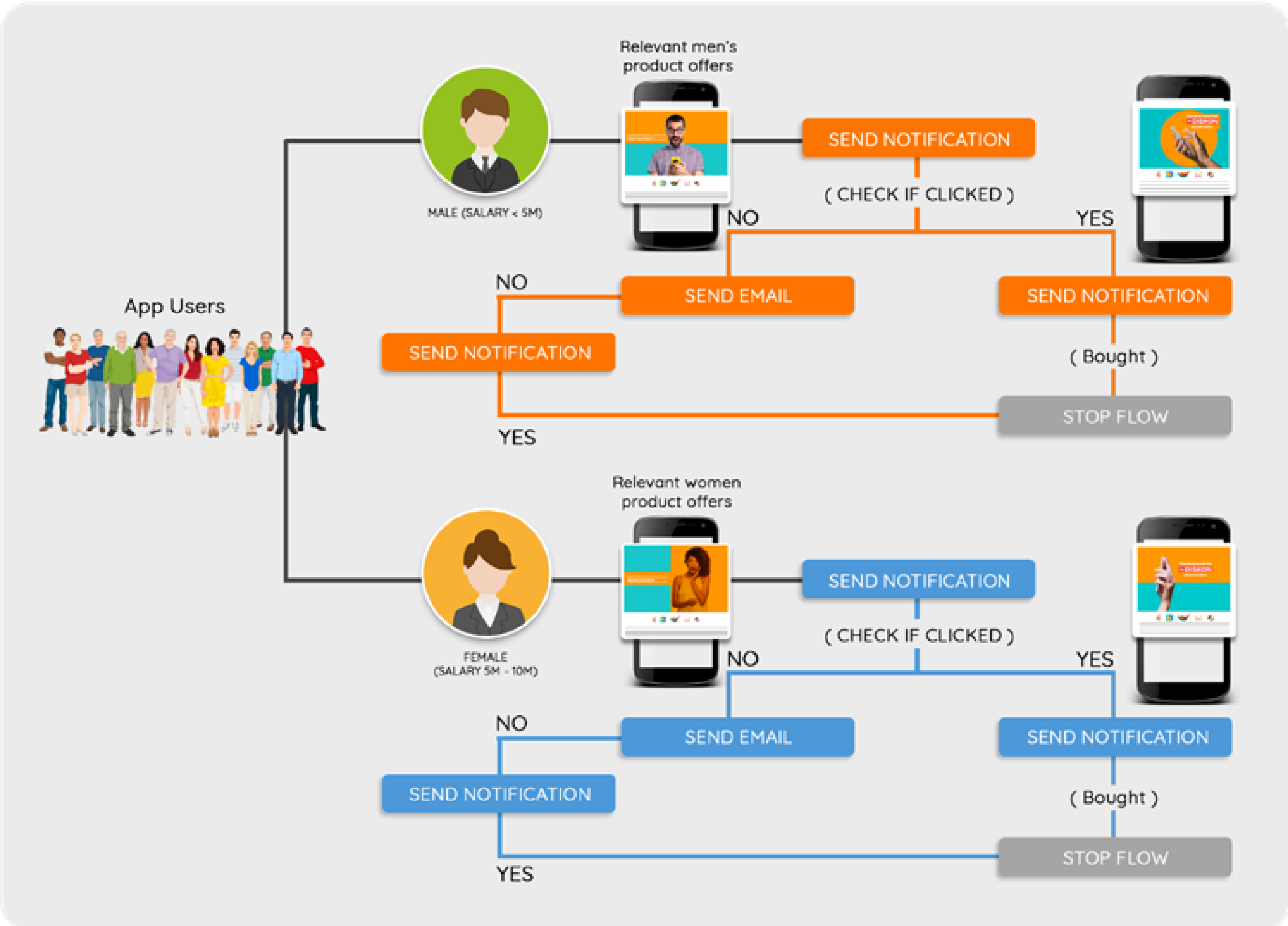
Fave created similar workflows to drive first purchase and to re-engage users who already made a first purchase. While their first-purchase transactions went up by 15%, the re-engagement helped them to improve their LTV by 2x.

One Mo Tip

If you're a MoEngage customer, you can monitor the conversion of users through the stages of the Flow in real time. You can continue to refine your user flows based on how they're performing.

3. Retention and Customer Advocacy: How to create personalized experiences to retain and build customer advocacy With so many apps vying for the attention of your customer, chances are your user may uninstall your app within a month. You have to find ways to engage them early on and retain them on your platform to reduce churn. Workflows can play a crucial role in reducing the churn and even turning them into brand advocates. Besides helping you identify the right touchpoints, work-flows also let you do smart segmentation so you can send your users personalized and relevant offers through push notifica-tions, emails, and SMSes as shown in the workflow below. Considering that most customers make a purchase based on the reviews they read online, you can even create a customer advocacy workflow to encourage customers who made purchases to share their feedback and rating on the app store, play store, and website by sending them a feedback email.

User Retention Workflow:



Kredivo, a fintech company in Indonesia, used a similar workflow to send personalized offers to different segments of users via email and push notifications, which helped in improving their conversions by 40%. They also sent automated emails to users who completed an in-app transaction seeking feedback and rating on app store and play store, which resulted in a 64% conversion rate.

How to
Implement Workflows

Now that you're aware of how to build workflows and the best practices to follow while building them, let's look at how you can implement it to put your customer engagement on autopilot.

Let's take MoEngage's Flows as an example again for implementing a workflow.

MoEngage Flows allows you to do the following:

Add personalization to the workflows:

You can personalize the communication that you send to the users based on user properties and user actions. For example, if the user has abandoned the cart, you can send them a personalized message reminding them of the added product. Here is how you can personalize the message.

Save or publish the workflows:

Once you create the workflows, you can either save them for future edits or make them live by choosing the publish option. Once published, the journey will be in Stats mode, wherein you can see users crossing each stage of the journey. This will help you to gauge if the workflow is functioning correctly or if there is room to further improve the journey.

Edit or duplicate the workflows:

The good part about workflows is you can edit them even when the campaign is live. With MoEngage Flows, you can edit the push/email messages and wait times/journey conditions. However, only users who have arrived the edited stage afresh will be displayed the changes. The ones who surpassed the edited stage will not be able to see them. If you want to make a complete change to the existing flow, you can pause it and duplicate it to create a new one.

Pause, resume, and stop the journey:

You can pause and resume the journey at any point of time in case you want to make edits or change the workflow completely. However, when you pause the journey, new users will not be able to enter the journey, no messages will be sent, no condition will be evaluated, and the users who are already in the journey will not be able to move to the next stage. The journey will begin only when you resume the campaign. Once you achieve your goals, you can stop the journey completely by clicking on the "Stop" button.

Things to remember when you implement a workflow :

Do a test run -
Don’t disappoint your customer with half-baked customer experience. Before executing the workflow, check if it aligns to what you had planned. Do a test run as a customer to know if the experience is seamless and positive throughout the journey. Fix the gaps if any before implementing.

Delegate to the right team members -
Identify team members who will be responsible for each task in your workflow. This will help you to manage the workflow effectively and ensure a frictionless journey for your customer.

Set KPIs to measure the outcome of the campaign -
Set measurable KPIs not just for the overall campaign, but for each stage of the campaign. This will help you to achieve the desired ROI and fix the errors that are stopping the campaign from performing.

Check for similar use cases before implementing -
Refer to the successful case studies related to your industry and understand how you can use their key takeaways to create your workflow. This will help you minimize errors and create better customer experiences.

CONCLUSION

To give you a quick recap, here's what we discussed:

• Flows are important to simplify marketing operations across different stages of the customer journey.

• They help to visualize, and streamline the activities right from onboarding to retention stage of the customer journey.

• They also minimize user attrition, increase customer LTV, and save time and cost for marketers so they can focus on important strategies.

• We gave a glimpse into how to create winning workflows for every stage of the customer journey with proven examples of Tokopedia, Fave, and Kredivo.

• While creating workflows, use these best practices to achieve your goals:
- **Keep the customer journey at the center while planning the workflow**
- **Identify the right channels and frequency to deploy the campaign**
- **Always experiment, analyze, and iterate the campaign to achieve the goals**

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

If you'd like to talk more about Flows, Automation, or Marketing in general, you can reach out to us on **hello@moengage.com** or try our **FREE TRIAL.**

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