Sample Customer Lifecycle Management Template

eTools

What's inside?

- Overview of CLM (Customer Lifecycle Management) Strategy

- Sample CLM

- Recommended BP by Persona

- Content Matrix Map

- Proposed Initial Flows

- Content Needed

Empower Customer Behavior

Goal is to identify the touchpoints for customer interaction such that you can identify and retain customers and increase AOV, ROI, and CLV for all customers.
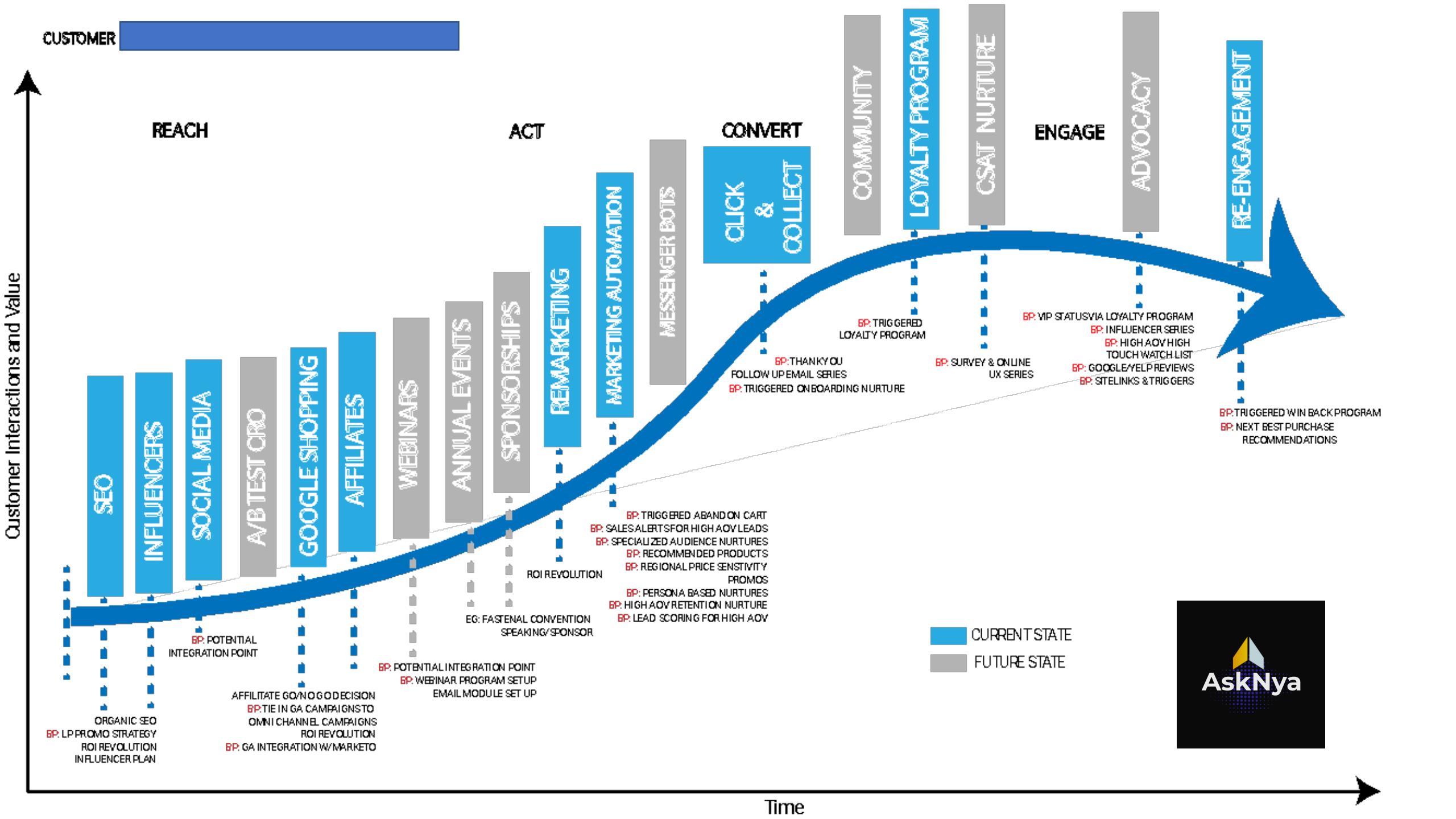
Track KPI's

Enable your team to track AOV, ROI, CLV for customers such that the leadership team can make recommended growth strategies that scale.

CLM & Scalability

Ensure steps taken are as automated as possible so that your team can scale effectively without huge manual intervention.

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CUSTOMER

Customer Interactions and Value

REACH

ACT

CONVERT

ENGAGE

SEO

INFLUENCERS

SOCIAL MEDIA

A/B TEST CRO

GOOGLE SHOPPING

AFFILIATES

WEBINARS

ANNUAL EVENTS

SPONSORSHIPS

REMARKETING

MARKETING AUTOMATION

MESSENGER BOTS

CLICK & COLLECT

COMMUNITY

LOYALTY PROGRAM

CSAT NURTURE

ADVOCACY

RE-ENGAGEMENT

BP: VIP STATUS VIA LOYALTY PROGRAM
BP: INFLUENCER SERIES
BP: HIGH AOV HIGH TOUCH WATCH LIST
BP: GOOGLE/YELP REVIEWS
BP: SITELINKS & TRIGGERS

BP: TRIGGERED LOYALTY PROGRAM

BP: SURVEY & ONLINE UX SERIES

BP: THANK YOU FOLLOW UP EMAIL SERIES
BP: TRIGGERED ONBOARDING NURTURE

BP: TRIGGERED WIN BACK PROGRAM
BP: NEXT BEST PURCHASE RECOMMENDATIONS

BP: TRIGGERED ABANDON CART
BP: SALES ALERTS FOR HIGH AOV LEADS
BP: SPECIALIZED AUDIENCE NURTURES
BP: RECOMMENDED PRODUCTS
BP: REGIONAL PRICE SENSTIVITY PROMOS
BP: PERSONA BASED NURTURES
BP: HIGH AOV RETENTION NURTURE
BP: LEAD SCORING FOR HIGH AOV

ROI REVOLUTION

EG: FASTENAL CONVENTION SPEAKING/SPONSOR

BP: POTENTIAL INTEGRATION POINT

BP: POTENTIAL INTEGRATION POINT
BP: WEBINAR PROGRAM SETUP
EMAIL MODULE SET UP

AFFILITATE GO/NO GO DECISION
BP: TIE IN GA CAMPAIGNS TO OMNI CHANNEL CAMPAIGNS ROI REVOLUTION
BP: GA INTEGRATION W/ MARKETO

ORGANIC SEO
BP: LP PROMO STRATEGY ROI REVOLUTION INFLUENCER PLAN

Time

CURRENT STATE
FUTURE STATE

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Sample Content Matrix

Sample Content Matrix

|	UID	Reach			Act			Convert			Engage		
		Content Name	# Pieces	Cadence	Content Name	# Pieces	Cadence	Content Name	# Pieces	Cadence	Content Name	# Pieces	Cadence
Content	001-INF01	Influencer Plan with Featured Products	5	Bi-Weekly Rotation									
Type		Short Video											
Persona		E-Commerce + High AOV											
Content	002-ROI01	Paid Campaign + SEO	ROI	ROI									
Type		PPC and SEO											
Persona		E-Commerce											
Content	003-SOC01	Social Media Instagram Videos	12	Weekly									
Type		Videos											
Persona		E-Commerce + High AOV											
Content	004-SOC02				Social Media Instagram Vide	12	Weekly						
Type					Videos								
Persona					E-Commerce + High AOV								
Content	05-ROI02				Promo Ads & Remarketing	ROI	ROI						
Type					PPC and SEO								
Persona					E-Commerce + High AOV								
Content	06-WEB01	GA Campaign + Email Automation	30	Weekly									
Type		Multi-Channel											
Persona		E-Commerce											
Content	06-WEB01				GA Campaign + Email Autom	12	Weekly						
Type					Multi-Channel								
Persona					E-Commerce								
Content	07-EVT01	Fastenal Convention Speaker Series	1	Bi-Annually									
Type		Event Email Campaign + In Person											
Persona		High AOV											
Content	08-WEB02	Abandoned Cart Program	3	Over 72 Hours	Abandoned Cart Program	3	Over 72 Hours						
Type		Email			Email								
Persona		E-Commerce + High AOV			E-Commerce + High AOV								
Content	09-SAL01	Sales Alert w/Client Notification	2	Over 5 Days									
Type		Email											
Persona		High AOV											
Content	10-NUR01	Segment Nurture by Region	3	Over 2 Weeks									
Type		Multi-Channel											
Persona		E-Commerce + High AOV											
Content	11-NUR02				Segment Nurture by High AO	3	Over 3 Weeks						
Type					Multi-Channel								
Persona					High AOV								
Content	12-NUR03							Retention Nurture for High	12	Weekly			
Type								Multi-Channel					
Persona								High AOV					
Content	13-EML01A										Thank You Email Series	3	Every 3 Days
Type											Email		
Persona											E-Commerce + High AOV	8	Weekly
Content	14-EML01B										Onboarding Nurture		
Type											Email		
Persona											High AOV		
Content	15-EML01C										Triggered Loyalty Series	6	Weekly

Sample Customer Campaign Flows

Sample Abandoned Cart Process Flow
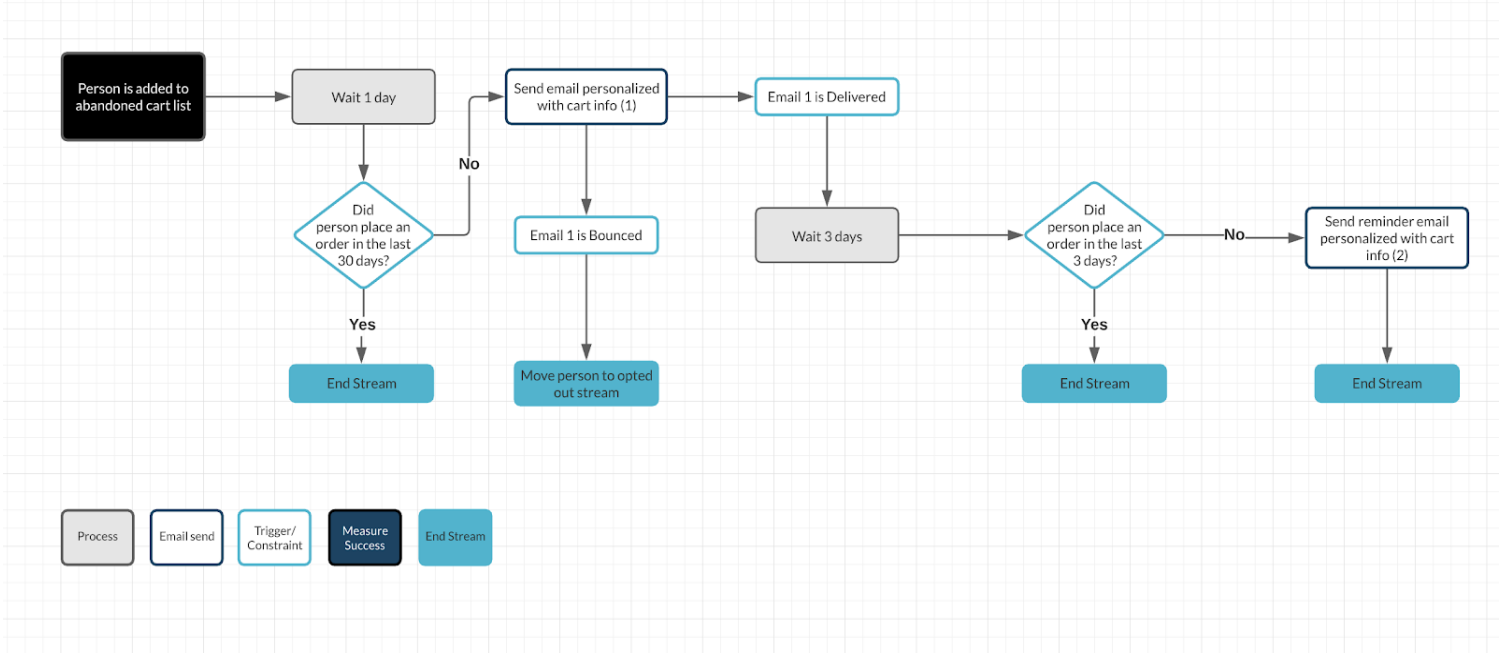
Sample Win Back Process Flow
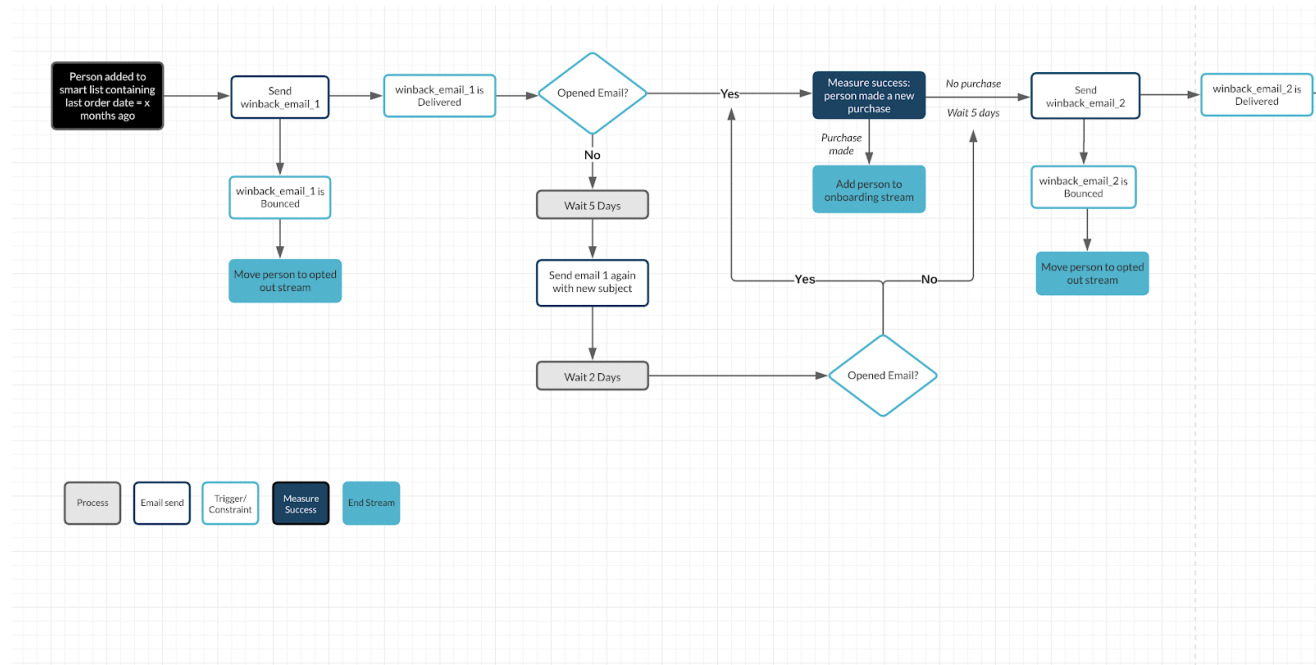
Sample Onboarding Flow
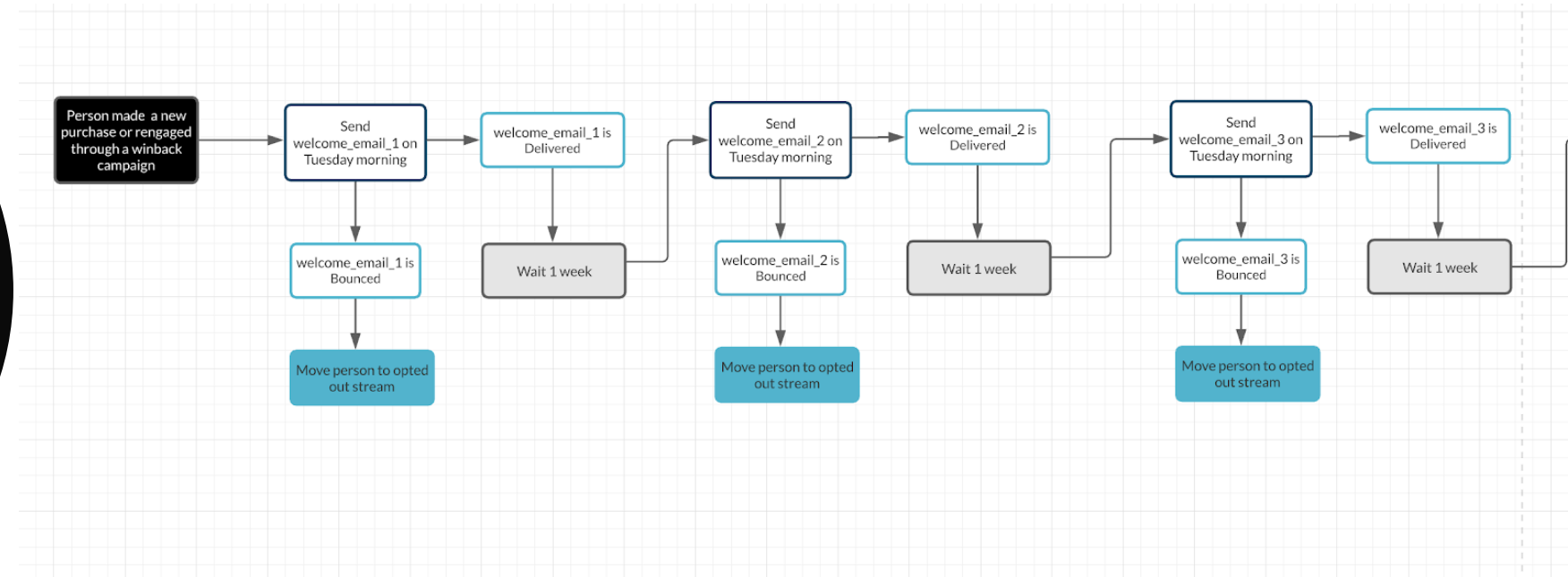
CONTENT NEEDED FOR STARTER FLOWS

FLOW	CONTENT ID	CONTENT	THEME
ABANDON CART	08-WEB02	**2 EMAILS** WITH DYNAMIC CONTENT FOR CART CONTENTS	CART CONTENTS WITH CLICK TO SEE FULL CART
WINBACK PROGRAM	19-EML02A	**5 EMAILS** WITH PERSONALIZATION AND OFFER	OFFER TO COME BACK AND SEE WHAT'S NEW
ONBOARDING PROGRAM	14-EML01B	**2 EMAILS** WITH DYNAMIC CONTENT FOR CART CONTENTS	CART CONTENTS WITH CLICK TO SEE FULL CART