

B2B CUSTOMER RETENTION JOURNEY

Make the new customer contact(s) feel welcome and appreciated. Begin onboarding process.

1. WELCOME NEW CUSTOMER

WELCOME COMMUNICATION OPTIONS

LETTER, DIRECT MAIL OR EMAIL
Short, genuine
Signed by meaningful exec
Onboarding info and resources
URL for online support/contact info

OPTIONAL VALUE ADD
Special content offer
URL/tracking mechanism

THANK YOU FOR YOUR REPEAT BUSINESS OPTIONS

LETTER, DIRECT MAIL OR EMAIL
Short, genuine
Signed by meaningful exec
Onboarding info and resources
URL for online support/contact info

OPTIONAL VALUE ADD
Special content offer
URL/tracking mechanism

Key customer contacts receive ongoing communications on a schedule, keeping your brand front-of-mind.

Present opportunities to enhance (cross-sell, upsell) the relationship with new products/services.

Segmentation and testing tactics, channels and number of touches will be tailored for program goals and budget.

During this phase, we add tactics such as surveys/polls to collect satisfaction, trend and preference data; solicitation of testimonials, reviews, quotes, case studies or reference requests; referral solicitation, etc.

2. DRIVE REPEAT SALES, REFERENCES & REFERRALS

MULTI-TOUCHPOINT PHASES TO NURTURE CUSTOMERS

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|---|---|---|
| <p>1.</p> <ul style="list-style-type: none"> <input type="checkbox"/> BLOG <input type="checkbox"/> CONTENT <input type="checkbox"/> DIRECT MAIL <input type="checkbox"/> EMAIL <input type="checkbox"/> SEM <input type="checkbox"/> SEO <input type="checkbox"/> SOCIAL MEDIA <input type="checkbox"/> OTHER CHANNELS | <p>2.</p> <ul style="list-style-type: none"> <input type="checkbox"/> BLOG <input type="checkbox"/> CONTENT <input type="checkbox"/> DIRECT MAIL <input type="checkbox"/> EMAIL <input type="checkbox"/> SEM <input type="checkbox"/> SEO <input type="checkbox"/> SOCIAL MEDIA <input type="checkbox"/> OTHER CHANNELS | <p>3.</p> <ul style="list-style-type: none"> <input type="checkbox"/> BLOG <input type="checkbox"/> CONTENT <input type="checkbox"/> DIRECT MAIL <input type="checkbox"/> EMAIL <input type="checkbox"/> SEM <input type="checkbox"/> SEO <input type="checkbox"/> SOCIAL MEDIA <input type="checkbox"/> OTHER CHANNELS |
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KEY CONSIDERATIONS

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| <ul style="list-style-type: none"> • Offer engaging content • Multiple CTAs • Easy response mechanisms | <ul style="list-style-type: none"> • Proactive promotion • Cross-promotion • Encourage sharing | <ul style="list-style-type: none"> • Track engagement • Engagement acknowledgment • Repackage & re-purpose |
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CUSTOMER RAISES HAND

DIRECT FOLLOW-UP BY SALES REP

Nurturing continues
OR
Customer completes repeat sale

CUSTOMER COMPLETES REPEAT SALE

Lead moves to Retention Journey

Comprehensive review of performance across touchpoints. Deliverable includes recommendations to optimize programs.

3. MEASURE ROI

ANALYZE & OPTIMIZE

ENGAGEMENT ANALYSIS

Quantity and quality
Conversion results

INTRO TACTIC METRICS

Quantity and quality
Engagement analysis
Conversion results
LP key performance metrics

NURTURING ENGAGEMENT

Blog traffic analysis
Content requests
Email analytics
Direct mail response
Social media analytics
Conversion results

INSIGHTS & RECOMMENDATIONS

Trends
What's working
What needs tweaking
Plan to move forward

REVISE & REPEAT