

ORACLE

ORACLE MARKETING CONSULTING

---

**An Oracle Consulting Checklist**

# Automated Campaign Ideas to Explore



Checklists can inspire you, help you identify gaps, allow you to take inventory, and provide an easy-to-follow action plan. At Oracle Marketing Consulting, we use checklists all the time with our clients. In fact, we love them so much that we wanted to share some of our most useful checklists, including this one about automated campaign ideas.

Whether sent via email, SMS, push, or other digital channels, automated campaigns are among the most effective campaigns you'll ever send, generating return on investments that are well above that of broadcast campaigns. These messages are so effective because they deliver the right content to the right person at the right time. They're able to do that because they're triggered by one of four behaviors:

- 1. An action taken** by the subscriber or customer or by the brand
- 2. Inaction over a period of time** by the subscriber or customer
- 3. A date that's important** to the individual subscriber or customer
- 4. A signal from an internet-connected device** owned by the customer

On the pages that follow, we list major triggered campaign types that are in each of those buckets, along with advice from our digital marketing consultants. Keep in mind that for any one type, you might have multiple versions based on business division, product category, subscriber acquisition source, or other factors. Throughout, we also indicate which of these triggered campaigns are transactional in all or most jurisdictions by marking them with an asterisk (\*). Consult a lawyer before making a final decision on how to treat these messages.

We hope this checklist inspires you to set up more of these highly impactful campaigns and helps you inventory the ones you already have. And, of course, if you'd like assistance, we're always here to help. Reach out to us at any time at [CXMconsulting\\_WW@oracle.com](mailto:CXMconsulting_WW@oracle.com).



**Amy Medina**  
Head of Campaign Automation Services  
**Oracle Marketing Consulting**

## Tips for using this checklist:

- ✓ **Check off** the triggered campaigns you already have. Also, consider noting how many versions of this campaign you have, the launch dates of each one, and the date you last reviewed or optimized it.
- **Strike** through the triggered campaigns that aren't appropriate for your business.
- **Circle** the names of the triggered campaigns you want to implement. When you're done going through the entire list, rank all of your circled triggers by level of effort and level of impact to help prioritize implementation.



# Action-Triggered Campaigns

When marketers think about automated campaigns, action-triggered ones are the first to come to mind. Triggered by actions taken by either subscribers and customers or by your company, these are the most common triggered campaigns and are the most effective at driving additional engagement. Here are some to consider:

## Purchases and account creations:

(\**transactional emails*)

- Purchase or donation confirmation message\***. This financial transaction receipt is the archetypal transactional email.
- eReceipt or offline purchase receipt message\***. Triggered via a point of sale in a store, restaurant, or other physical location, these digital receipt emails tend to vary significantly in design from a receipt triggered by an online purchase.
- Payment received confirmation\***. Confirms the receipt of a payment, whether it was paid manually by the customer or auto-paid via a credit or debit card or ACH.
- Payment failure alert\***. Informs customer that their payment method on file for a recurring service has failed. This email tells them how to update their payment information and what, if any, grace period they have before their service is suspended or their account deleted.
- Change confirmation\***. Confirms a requested change initiated by the customer or user, whether it's a change of a payment method, a seat selection, service date, or another aspect of a purchase.
- Order cancellation notification\***. Tells customer that their order or service has been cancelled due to lack of inventory, a show or flight cancellation, or similar event. It also informs them about the refund policy as it applies to their purchase.
- Order cancelled confirmation\***. Confirms that the customer's order has been cancelled as they requested.
- Pre-order price difference refund alert\***. Tells customer that the price of their pre-ordered product has changed and that a refund has been issued via their payment method.
- Item(s) sold notification**. Message from an auction site, marketplace, or other venue for telling a seller or store owner that there's been one or more items purchased by a customer and that a credit has been applied to their account.
- Purchase ready for download alert\***. When tickets, lodging, and other similar services are sold via a reseller marketplace, this message arrives after the receipt and delivers instructions on how to take possession of or access the service they purchased.
- Shipping notification\***. Tells customer their order is on its way.
- Next delivery shipping soon notification\***. Tells customer of subscription product delivery service that their next order is shipping soon.
- Shipping delay notification\***. Tells customer about shipping delays.
- Delivery confirmation\***. With both product and food deliveries, these are increasingly expected by customers. Many also include a picture of the delivery to help customers find it, as well as to confirm that it was delivered to the correct location.

- Return request confirmation\***. Confirms that the customer has indicated they're returning a purchase for a refund or exchange.
- Return received or refund credited notification\***. Tells customer their return has been processed successfully.
- Credit via e-gift card notification\***. Tells customers that they've been given a refund or credit in the form of an e-gift card, details of which are included in the message. (See more on gift cards below)
- Promotional credit notification\***. Tells customer that a credit has been added to their account because of a promotion associated with their purchase.
- Order ready for pick up in store or curbside notification\***. Also confirms the products ordered, the location for pickup, and the process to follow at the location.
- Product care coverage plan confirmation\***. Provides proof of the coverage plan purchased for the customer's device, furniture, or other durable good. The message reiterates coverage and includes links and contact information for servicing.
- Account creation confirmation\***. Confirms creation of an account of any kind.
- Verify your account request\***. Tells person that their account has been created but needs to be verified before it becomes active and its full benefits can be accessed. Verification can include clicking a link in an email associated with the account or entering the amounts of small deposits into the banking account associated with the account.
- Account verified confirmation\***. Confirms that the user's account has been verified and is now ready for use or for the next step in setup.
- Connection confirmed notification\***. Tells account owner that the invitation they extended to an individual has been accepted, whether that invitation was to become a connection on a social network, join a family plan, or another form of group creation or expansion.
- Double opt-in confirmation request message\***. Asks owner of the email address to click a link in the email to confirm they indeed signed up to receive marketing emails from the sender. Learn more about [double opt-in best practices](#).

“

*Order confirmation messages can do more than just confirm an order. In the US and some other countries, it's acceptable to include a small amount of promotional content at the bottom of transactional messages. We find that content related to the purchase, personalized recommendations, and seasonal content are the most effective at driving additional engagement.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting

*Your customers make the best subscribers, so think of ways that you can use secondary messaging in your transactional emails to convince them to opt in to receive your promotional emails.*



**Jonathan McClure**  
Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

*Either as part of a purchase confirmation message or a standalone, let non-loyalty members know the points or benefits they are leaving on the table by not joining. Would last night's dinner have gotten them halfway to a free appetizer reward? Perhaps even give them an opportunity to sign up and still earn on that previous purchase.*



**Helen Lillard**  
Principal B2C Consultant,  
Oracle Marketing Consulting

*Maintaining brand trust and customer loyalty are more important than ever during these challenging economic times. Be sure that any traditionally negative messages, such as a shipping delay or order cancellation, are presented empathetically in a transparent and supportive tone. You may also want to "make it up" to your customer by adding an incentive to such messages and highlight the 'Reasons to Believe' in your company.*



**Roald Ansano**  
Senior Art Director for Creative Services,  
Oracle Marketing Consulting

## Onboarding and welcomes:

(\*transactional emails)

- Promotional email welcome (series).** Confirms a successful signup for promotional emails, but also reinforces the benefits of receiving these emails and encourages subscribers to take next steps. Learn more about [welcome email best practices](#).
- Account or loyalty program onboarding messages\*.** Confirms a successful signup for an account, a loyalty program, or another program, but also reinforces the benefits of the program and encourages new members to take next steps.
- Trial welcome message\*.** Confirms the start of a product or service trial and provides details on how to get started, where to get help, and more. (Also see Free trial expiration notification in Date-Triggered Campaigns)

“

*Sending one opt-in confirmation request may be enough, especially if you're getting a high rate of confirmation. Others may need to send a 'Reminder' and then perhaps even a 'Last chance' confirmation request email to get their rates up. Sending those to non-responders within 1 or 2 weeks could be effective, and not too risky.*



**Daniel Deneweth**

Head of Email Deliverability Services,  
Oracle Marketing Consulting

*Let's be honest—many people sign up for promotional email just to receive the signup incentive. Whether it's a coupon code, free trial, or welcome gift, be sure the incentive is aligned with your business goals and provides an opportunity to upsell the subscriber. Many times, welcome series generate revenue metrics second to only abandoned cart and browse triggers.*



**Roald Ansano**

Senior Art Director for Creative Services,  
Oracle Marketing Consulting

## Gifts and egift cards:

(\*transactional emails)

- Gift detail selection request message\*.** Tells recipient they've been given a gift that requires them to choose a size, color, or other details before it can be shipped to them.
- E-gift card delivery message\*.** Presents recipient with store credit in the form of a digital gift card or certificate.
- E-gift card delivery confirmation\*.** Tells the egift card sender that their gift has been delivered to the recipient.

“

*With the pandemic drastically accelerating e-gift card sales, messaging around them presents a growing opportunity. Communicate clearly to e-gift card buyers so they feel good about making repeat purchases, and use your triggered messaging to encourage and inspire e-gift card recipients to redeem their gift so revenue can be booked.*



**Chad S. White**

Head of Research,  
Oracle Marketing Consulting

## Abandonment:

---

- Browse abandonment campaign.** Sent when a subscriber browses a product category but doesn't place anything in their shopping cart. These generally highlight the last product browsed, plus other products in the category browsed. They may also highlight financing options, corporate practices, and other issues to overcome potential buyers' hesitations.
- Project abandonment campaign.** Sent when a subscriber starts customizing a product or service, such as a survey or a holiday card, but doesn't add the completed item to their shopping cart.
- Shopping cart abandonment campaign.** Sent when a subscriber places one or more products in their shopping cart, but doesn't check out. Often part of a series, these emails typically remind the subscriber of what they've left in their cart, but also may present alternative products related to the abandoned item. (Also see Cart expiration warning in Date-Triggered Campaigns)
- Checkout abandonment campaign.** Sent when a subscriber doesn't finish the checkout process. These often offer help and inquire about technical or other troubles potentially encountered during checkout.
- Calculator/estimate/quote abandonment campaign.** Sent when a subscriber inputs their information into a tool generates a price, price comparison, financing estimate, service quote, or something similar but then doesn't convert. Typically, the messaging in these emails try to continue the forward progress by offering additional information, trying to build brand trust, or providing contact information to escalate to a live agent or representative, for example.
- Need help? message.** Sent when a customer does not make a purchase, but takes an action that may indicate they are having trouble placing an order, such as clicking on the forgot login link and then not logging in subsequently.
- Store locator abandonment campaign.** Sent when a subscriber abandons a store locator page, this message promotes an omnichannel experience and may include reassurances of in-store health and safety precautions, buy online pick up in store (BOPUS) and [curbside pickup options](#), shop (in-store) by appointment, and same-day delivery.

“

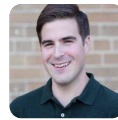
*The optimal cadence and number of touches in an abandonment series can vary widely by brand and should be thoroughly tested. However, when it comes to timing on that first touch, immediacy is universally crucial. We have seen up to a 60% increase in conversion when timing is cut from 24 hours to 1-2 hours following abandonment.*



**Chris Wilson**

Strategic Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

*Be careful that subsequent promotional mailings don't undermine your abandonment emails by crowding them out or diluting their impact. Some of our clients pause promotional emails or put abandoners into a reduced frequency mailstream in order to boost the visibility and performance of their triggered emails.*



**Kyle Sjoberg**

Senior Strategic Consultant for  
Analytic & Strategic Services,  
Oracle Marketing Consulting

*Store locator abandonment campaigns are highly relevant right now because of the pandemic, which is changing consumers' buying habits and causing stores to roll out new services and delivery options that make things easier and safer for the consumer.*



**JT Capps**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

## Change in price or stock status:

- Price change or item on sale alert.** Tells customer that an item that they browsed recently, purchase regularly, saved for later, or added to a wishlist has changed in price (usually downward) in order to spur a purchase.
- Low inventory alert.** Tells customer that an item that they browsed recently, purchase regularly, saved for later, or added to a wishlist is at risk of becoming unavailable. This is most effective for seasonal items, limited run products, and other items that aren't likely to be back in stock soon, if ever.
- Back-in-stock notification.** This is either sent to consumers who sign up to be notified when an out-of-stock product is in-stock again or to subscribers who browsed and then abandoned the page of a product that was out of stock.
- New product alert.** This is either sent to consumers who sign up to be notified when a new product launches or is triggered by AI to customers who have bought similar products in the past.

- Save for later reminder.** Independent of a price change or change in availability, this message simply reminds the customer of the items that they've chosen to "save for later."

“

*FOMO (Fear Of Missing Out) doesn't only occur when you're scrolling Instagram. It can also happen in the inbox. Letting customers know that they could miss out on a product with low inventory that they've been looking at could be just what they need to go from browser to purchaser—and who knows, maybe even influencer.*



**Reed Pankratz**

Senior Strategic Consultant for  
Analytic & Strategic Services,  
Oracle Marketing Consulting

## Credit or debit card, account balance, etc.:

(\*transactional emails)

- Low-balance alert\*.** Notifies customer that they've used X% of their credits, minutes, data, or other currency.
- Zero-balance alert\*.** Notifies customer that they've used all of their credits, minutes, data, or other currency.
- Large purchase alert\*.** Notifies customer that an unusually large debit has been made against their account.
- Large deposit alert\*.** Notifies customer that an unusually large credit has been applied to their account
- Fraud protection alert\*.** Notifies customer that one or more suspicious charges have been made to their account and asks them to confirm those charges or contact customer service.

- Credit score change alert.** Notifies customer that their credit score has changed. May also include details on how to get a full report, advice on improving their score, and other educational or instructional information.

“

*Credit card and account billing emails are not only a great place to incorporate secondary product messaging, but they are a useful tool for getting in front of customers who are not opted in to your marketing emails. Just make sure the secondary message has a logical connection to the primary message, so it doesn't feel like it is coming out of left field.*



**Jonathan McClure**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting



## Post-purchase:

---

- Service or product review request.** Asks a customer to submit a review for the product or service purchased or experienced X days ago.
- Review submission thanks message.** Thanks the customer for reviewing the product or service.
- Help more people by submitting more reviews request.** Tells customer how many people have viewed, liked, commented on, or otherwise engaged with one or more of their previous reviews, generally as a way to encourage them to submit more reviews.
- Answer this product or service question request.** Asks a customer to answer a question posted on the company's website by a shopper about a product or service that the customer previously purchased.
- Care or installation instructions message.** Helps the customer properly set up, install, use, or maintain their purchased product.
- Upsell or cross-sell campaign.** This builds upon a past purchase by promoting accessories or upgrades or by promoting related or synergistic products.
- Post-purchase thank you message.** Rather than trying to upsell customers, this message aims to make the customer feel good about their purchase and strengthening their affinity for your brand. The email does this by sharing company culture, building the brand story, or emphasizing your charitable or social endeavors, for example.
- Short-supply, re-order, or replenishment campaign.** Tells the customer that it's probably time to re-order a consumable product that they've ordered in the past. The timing of this email is based on either the customer's usual re-order pattern or on the average repurchase pattern across all of their customers.

“

*Remember that not all of these automated messaging strategies need to be a dedicated touch. For some calls-to-action, it may be appropriate to add them through personalization to an existing dynamic template within the channel communication. Or you could use a dedicated touch for the first message and use dynamic content in subsequent messages to reinforce the CTA.*



**JT Capps**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

*Forging great relationships with customers often comes by providing utility in the messages we send them. If a customer consistently orders a certain product or if they order a product that needs to be regularly replenished, it makes sense to remind them before they run out and are potentially inconvenienced.*



**Reed Pankratz**

Senior Strategic Consultant for  
Analytic & Strategic Services,  
Oracle Marketing Consulting

## Support and private network communications:

(\*transactional emails)

- Message received confirmation message\***. Confirms that a message emailed to your company or sent by completing a form was successfully received. It generally sets expectations for when the recipient can expect a reply.
- New message alert\***. Notifies the user that they have a new message in the message center of their account, whether it's at a social media, medical, financial, or other business.

## Appointments and reservations for paid services:

(\*transactional emails)

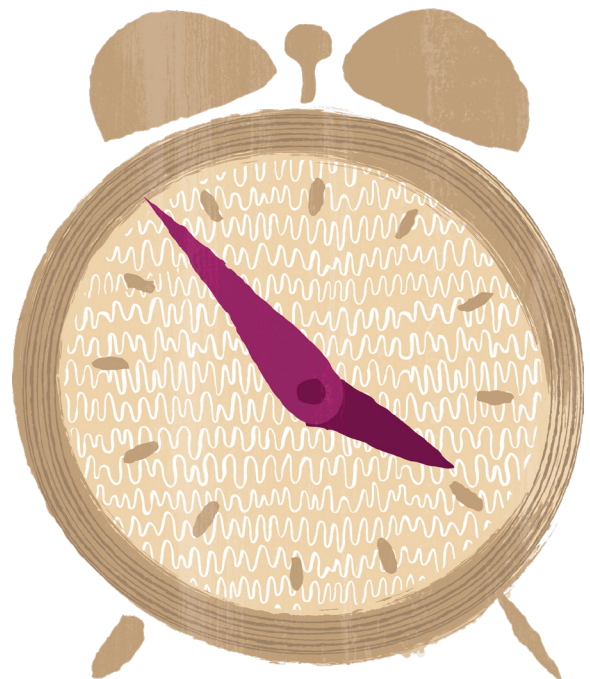
- Appointment scheduled message\***. Confirms that customer has scheduled service on a particular date at a particular place with a particular person or group.
- Appointment confirmation request message\***. Asks customer to re-confirm that they're able to keep their previously scheduled appointment by clicking a link in the email or calling customer service.
- What to expect from your appointment message\***. Following up on the appointment scheduled email or appointment confirmation request email, this message details what the customer needs to do to prepare for the appointment, whether it's dietary restrictions ahead of a medical appointment or asking a homeowner to make sure that a technician has easy access to certain parts of their home, for example. It may also include the name, contact information, and picture of the agent or technician that's providing service to the customer.
- Appointment cancellation confirmation message\***. This confirms the cancellation of an appointment and tells the person how to reschedule it.
- Missed appointment or event notification\***. Tells the recipient that they missed an appointment or event. For appointments, it may remind the recipient of when it was and tell them how to reschedule. For events, it may tell them how to access event recordings and other materials. These messages may also provide information about missed appointment fees or other policies related to costs and refunds.

“

*What to expect details—whether in a standalone email or integrated into other appointment-related messages—changed significantly during the pandemic as safety procedures changed. This messaging will need to evolve again when the pandemic eventually ends. When that happens, I hope more companies take the opportunity to make these messages more branded, empathetic, and friendly, and less coldly transactional.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting



## Form completion for free events, content, and contest entries:

(\*transactional emails)

- Event registration confirmation email\***. Confirms successful signup for a free event, providing key details about the event as well as directions on how to access the event and next-steps.
- Downloadable content delivery email\***. Delivers a link to the requested free downloadable content such as a report or guide. It may also promote related products, services, or other content.
- Contest entry confirmation\***. Confirms entry and reiterates contest rules, terms and conditions, and other information.
- Contest winner notification\***. Tells the entrant that they've won the contest or sweepstakes and how to collect their prize or reward. You can also send a notification to non-winners.

“

*Automation campaigns should help demonstrate how well you know your customers. The communications should be in the spirit of clienteling that helps establish and support long-term relationships that drive lifetime value and brand advocacy through a personalized customer experience.*



**JT Capps**

Director of Analytic & Strategic Services,  
Oracle Marketing Consulting

## Wish list or gift registry:

(\*transactional emails)

- Wish list creation confirmation email\***. Confirms creation of a wish list and provides a link to it, along with other helpful instructions.
- Item added to registry notification**. When a list or registry has been formally shared with others, this message lets those people know when new items have been added.
- Registry item purchased notification**. Tells registry or list owner that one of their items has been bought.
- Registry item out-of-stock alert**. Notifies registry or list owner that one of their items is no longer available. Depending on the circumstances, it may also tell them whether it's expected back in stock at some point, suggest alternative items, or inform them that it's been removed from their list.

“

*While one of the beautiful things about automated campaigns is they run in the background, I recommend regularly reviewing them, either quarterly or semi-annually—plus any time there is a drastic shift in public mood (I'm looking at you, COVID). Has your brand voice changed? Does the tone of the email need refreshing? Is the imagery looking a little dated? A clothing retail client I worked with would update the pictures in their automated campaigns on a seasonal basis, so they were always stylish and appropriate.*



**Helen Lillard**

Principal B2C Consultant,  
Oracle Marketing Consulting

## Petitions, surveys, and quizzes:

---

- Completion thank you notification.** This thanks the person for completing the petition, survey, or quiz. It may deliver a reward for their time or encourages them to take another action that builds upon the previous action, such as sharing a message on social media that encourages their followers to also complete the petition, survey, or quiz.

## Digital media engagement:

---

- Achievement unlocked notification.** Congratulates the recipient on beating a game, completing a video or audio education series, or finishing some other digital content. It might present them with a digital certificate, badge, or other marker of this achievement, in addition to encouraging them to begin new content.

## Loyalty program:

---

- Early engagement messages.** Triggered to early engagers of your loyalty program, these messages urge and incentivize them to complete their profile, indicate their preferences, and take other actions that allow you to better cater to their interests.
- Loyalty level unlocked notification.** Congratulates program member on ascending to the next level of your loyalty program and describes the new benefits they now have access to, in addition to reminding them about all of the benefits they've previously unlocked.
- You're so close notification:** Tells program member they are X points, purchases, or dollars away from unlocking the next level of your loyalty program. Usually these messages highlight the benefits they'll receive when they reach the next level to spur action.
- Spend your loyalty points message.** When a program member has accrued X loyalty points, this message encourages them to spend them, suggesting items, experiences, or other rewards they'd value or that are popular among program members at large. (Also see Loyalty benefits expiring alert in Date-Triggered Campaigns)
- Post-redemption messaging.** Thanks a program member for redeeming rewards and lets them know how they can build their balance back up.

“

*A loyalty program can't be successful if its members don't redeem their points for rewards. Redemptions are how you generate value for loyalty members, so it's important to nudge them to take advantage of their rewards before they expire.*



**Rosanna Tirrito**  
Director of Client Success,  
Oracle CrowdTwist

**Oracle CrowdTwist** helps you connect your largest and most valuable customers with loyalty and reward programs specifically targeted to them. CrowdTwist increases profitability, deepens customer relationships, and improves customer retention.

[Learn more about Oracle CrowdTwist.](#)

## Security alerts:

(\*transactional emails)

- Login on new device notification\***. Notifies account-holder if a login is detected on a previously unknown device.
- Password reset message\***. Allows user to reset their password by clicking a link in the message.
- Password change alert\***. Tells user that their account password has been changed.
- Contact information changed alert\***. Notifies user that their mailing address, mobile phone number, or other critical information has been changed and to take action if they didn't make this change to their account.

“

*In an increasingly online world, it's critical that we protect our customers. Notifications about suspicious activity and account changes can help customers determine whether unauthorized changes have been made to their accounts. That's good for your business, because if a customer loses control of their account, they're also likely to lose trust in your brand and turn to competitors.*



**Reed Pankratz**

Senior Strategic Consultant for  
Analytic & Strategic Services,  
Oracle Marketing Consulting

Oracle Marketing Consulting's Campaign Automation Services team can help you optimize your existing triggered emails and set up new ones. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Inaction-Triggered Campaigns

Routine interactions with a customer is a sign of a healthy relationship. When there's a lack of engagement, these inaction-triggered campaigns try to address that and reestablish a healthy relationship. These campaigns include:

## Inaction or lack of engagement:

- Email reengagement campaign.** Triggered by a lack of email opens by a previously active subscriber, this has the singular goal of getting the subscriber to open the email.
- Email re-permission campaign.** When reengagement campaigns fail, this notifies the recipient that they won't receive any more promotional emails from you unless they re-confirm their interest by clicking a link in this email.
- Never-active re-permission campaign.** Sent to new subscribers who haven't engaged with any of the emails sent to them during their first X days on your list. Like a traditional re-permission campaign, this message requires the recipient to click a link in the email in order to remain subscribed. Learn more about [how to manage both kinds of inactive subscribers](#).
- App or service reengagement campaigns.** Triggered by a lack of mobile app sessions or service usage, this encourages the user to open the app by providing incentives, giving them usage tips, highlighting new features, and other tactics.
- Loyalty program reengagement campaign.** Triggered by a lack of loyalty program logins or loyalty dashboard visits, this message encourages the program member to login or visit their loyalty dashboard for additional points in the program or a different incentive.
- Claim your loyalty reward message.** Triggered by the failure to claim or use a loyalty reward after X days of being issued, this message encourages the program member to claim their reward or use their reward toward a purchase, depending on the type of reward issued.

“

*Always consider possible persona behaviors. For example, many gift-giving shoppers will sign up for email before or while purchasing for a friend or family member. If reengagement efforts are not fruitful at the typical cadence of non-activity, consider trying to reengage during the 10th or 11th month post-purchase to account for potential annual gift-giving events.*



**Roald Ansano**

Senior Art Director for Creative Services,  
Oracle Marketing Consulting

*As a last-gasp effort to save inactive subscribers, we recommend sending a triggered re-permission campaign. This is the last email a subscriber will receive from you before you move them into your inactive segment. Like an opt-in confirmation request email that's sent as part of a [double opt-in permission process](#), this email asks the subscriber to click a link in the re-permission email confirming that they'd like to continue receiving your emails. If they don't respond, then it's time to move on.*



**Daniel Deneweth**

Head of Email Deliverability Services,  
Oracle Marketing Consulting

## Lack of purchases or falling lifetime value:

- **Win-back campaign.** Triggered by a lack of purchases, this seeks to generate a new sales conversion, usually through a sizable incentive.
- **High-LTV rescue campaign.** Triggered when a customer's lifetime value falls from what was previously a high level, this campaign will likely use more aggressive or higher value discounts and incentives than a typical win-back campaign.

“

*When targeting customers for win-back and rescue campaigns, be careful to ensure that you have a holistic view of what they're doing in every channel. Just because they're not buying through your emails, app, or more broadly online doesn't mean they're not buying from you in store or via your call center. A misfire on these campaigns can create resentment and dissatisfaction, especially if the customer buys frequently or just made a big purchase.*



**Clint Kaiser**

Head of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Oracle Marketing Consulting's Email Deliverability Services team** can help you manage your inactive subscribers so that you minimize your deliverability risks while maximizing your revenue. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Date-Triggered Campaigns

Some dates are pivotal to customer relationships. Date-triggered campaigns leverage those dates to maintain a healthy relationship and to serve and delight customers. Here are some to consider:

## Renewals and expirations:

(\*transactional emails)

- Auto-renewal notification\***. Tells customer about the upcoming renewal of their service. In addition to reminding them of the benefits of their service, it also tells them how to discontinue service or turn off auto-renewal.
- Service expiration notification\***. Tells customer about the upcoming end of their service and encourages them to renew or purchase another service.
- Free trial expiration notification\***. Notifies recipient that their free trial is nearly over and tells them either how to become a paying customer or how to turn off the auto-enrollment that was stipulated in the trial terms.
- Loyalty points or reward expiring alert\***: Tells program member that their loyalty points, miles, or other currency will expire soon and encourages them to use them, or that a loyalty reward will expire soon and encourages them to claim it.
- Loyalty tier or benefits at risk alert\***: Tells program member that they need to take certain actions by a particular date to maintain their current loyalty level or else it will fall to a lower level.
- Cart expiration warning**. Triggered X days after a cart abandonment, this message tells the subscriber that their shopping cart is expiring “soon,” which would result in the items in their cart being deleted.

“

*Expiration and renewal messages often warrant a series of communications leading up to and perhaps even just beyond the expiring event. If it's the consumer's last chance, be sure to call that out in the subject line—a sense of finality is a great motivator for action!*



**Clint Kaiser**

Head of Analytic & Strategic Services,  
Oracle Marketing Consulting



## Statements and bills:

(\*transactional emails)

- Statement is available notification\***. Tells customer that their account statement is ready to be viewed in their account.
- Payment is due reminder\***. Triggered potentially at multiple intervals before and after a payment is due, this message notifies the customer about an outstanding bill.

## Credit or debit cards:

(\*transactional emails)

- Payment card expiring alert\***. Tells customer the payment card they're using for recurring payments will be expiring soon. Asks them to update their payment information.
- Payment card expired alert\***. Tells customer the payment card they're using for recurring payments has expired and their subscription or service has been put on hold. Asks them to update their payment information to resume service.

## Anniversaries:

- Birthday message**. Sent on their birthday, X days before their birthday, or on the first day of their birthday month, this celebrates the customer's birthday and typically delivers a freebie, discount, or something else of value that's connected to your brand.
- Wedding anniversary message**. Sent X days before the customer's wedding anniversary, this message provides product recommendations for their anniversary gift to their spouse or an offer or incentive to book a reservation at your restaurant, hotel, resort, spa, or other venue.
- Product purchase anniversary message**. Marks the anniversary of the purchase of a product with a multi-year lifespan (i.e., computer, car, tractor, etc.) and generally provides information about usage, maintenance, updates, upgrades, new features, or other topics with the goal of increasing product satisfaction and customer retention.
- Subscriber, member, or customer anniversary message**. Marks how many years the recipient has been with your brand in some capacity. It also typically delivers a reward as a thank you, whether it's a discount, digital badge, or something else. The digital campaign might be followed up with direct mail that delivers stickers, a certificate, or some other physical item to mark the occasion.
- Automatic reward notification**. Tells loyalty program member that they've received an automatic notification or reward for hitting a milestone, such as the member's birthday or the anniversary of them joining the loyalty program, or the launch anniversary of the loyalty program itself. This notification often drives members to log back into their account to see the reward they've received.

“

*I worked with a restaurant that had a web form for diners to fill out with special dates like birthdays and anniversaries. For the people that completed it, they would send a reminder a few weeks before with a free dessert coupon, suggesting they make a reservation. The creative would change based on whether it was a romantic anniversary or family celebration, and links would direct you to view new featured menu items. It was highly successful!*



**Helen Lillard**  
Principal B2C Consultant,  
Oracle Marketing Consulting

*Some companies can only tolerate, say, 6 months of inactivity before they need to suppress a subscriber from promotional emails. If that's you, consider treating anniversary, birthday, and other select automated campaigns as part of your reengagement program as these messages are highly likely to reactivate seasonal, once-a-year shoppers.*



**Roald Ansano**  
Senior Art Director for Creative Services,  
Oracle Marketing Consulting

## Replacement and re-supply:

---

- Short-supply, re-order, or replenishment campaign.** Tells the customer that it's probably time to re-order a consumable product that they've ordered in the past. The timing of this email is based on either the customer's usual time between purchases or on the average across all of their customers

## Events, appointments, trips, etc.:

(\*transactional emails)

---

- Service due reminder\***. This reminds the recipient to schedule an appointment for a service that is due, particularly for a service that is part of a paid membership.
- Event reminder\***. This reminds the person of their upcoming event, reiterating key details like appointment time or time window. If a technician, installer, or other representative will be visiting the person's house, office, or property, this message will include that person's name and possibly their contact information and picture.
- Attendance confirmation request\***. Sent X days ahead of time, this asks the attendee to click a link in the email or take another action to confirm that they will indeed be attending the appointment or other event.
- Other pre-event messages\***. Sent at appropriate dates before a service appointment, trip, or other event, these help the recipient prepare for it, whether it's ensuring they have an up to-date passport or immunizations (for travel), have refrained from eating or other activities (for surgery), have selected their sessions (for conference), or something else.
- During-event message\***. Sent at appropriate times during a multi-day event, these help the recipient navigate the event and get the most out of it.
- Post-event message\***. Sent at appropriate dates after a service appointment, trip, conference, or other event, these help the recipient take any remaining necessary or desired actions, including booking their next event.

Oracle Marketing Consulting's Creative Services team can design compelling email experiences that generate the desired results. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Machine-Triggered Campaigns

In the age of internet-connected devices, your products may send you alerts via email, SMS, or push. Machine-triggered campaigns come from these internet of things (IoT) devices based on preset conditions or requested alerts. Here are some to consider:

## Product service or attention needed:

- Product maintenance alert\***. Tells the product owner and pre-selected third parties that their internet-connected product needs attention, whether their car is signalling for service, their device is low on power or ink, or it's something else.

“

*Machine-triggered campaigns will get even more interesting in the future when, for instance, your smart printer automatically re-orders ink when it gets low and then your preferred supplier sends you an order confirmation email.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting

## Activity detected:

- Activity detected alert\***. Notifies the customer and pre-selected third parties that their internet-connected product has detected activity that may need their attention, whether its a security camera that's seeing activity, a water or freeze detector that's been activated, or something else.

**Oracle Marketing Consulting's Implementation Services team** can help integrate IoT devices into your customer experience and marketing suite to deliver the right email, SMS, and other digital messages to the right customers at the right time. Want to discuss your needs? Reach out to us at [CXMconsulting\\_ww@Oracle.com](mailto:CXMconsulting_ww@Oracle.com).

# Managing, optimizing, and expanding your array of automated campaigns can generate a huge return on investment and give you a powerful and sustainable competitive advantage. We can help with that—and much more.

Oracle Marketing Consulting has more than 500 of the leading marketing minds ready to help you to achieve more with the leading marketing cloud through...

- Implementation Services
- Platform Training & Adoption Services
- Analytic & Strategic Services
- List Growth & Demand Generation Services
- Database Management & Compliance Services
- Design Thinking & Innovation Services
- Creative Services
- Coding Services
- Campaign Automation Services
- Campaign Deployment & Monitoring Services
- Email Deliverability Services
- Performance Reporting Services
- Website Optimization & Personalization Services
- Social Media Strategy & Analytics Services

**Want help?** Let's talk about how we can work together to seize your opportunities and overcome your challenges. Reach out to us at [CXMconsulting\\_WW@oracle.com](mailto:CXMconsulting_WW@oracle.com).