How to Create a Successful Re-Engagement Workflow

Prepared by:
Jeanie Parker
iContact

Table of Contents

Creating a Re-engagement Workflow

Growing and maintaining a healthy and engaged subscriber list of contacts invested in what you have to say requires consistency, dedication, and time. However, no matter how good you think your list is, over time, your open and click rates can decrease. The ramifications of low engagement are greater than you think. If you don't watch your engagement rate, it can eventually lead to internet service providers (ISPs) such as Gmail, Yahoo, and AOL filtering your emails out – even from the inboxes of contacts who legitimately subscribed. While having high list numbers is a great ego boost, if a segment of your contacts doesn't open your emails or click on your content, it's best to decrease your volume of messages to the group, reassess the value of the content you are sending to them, or even remove those contacts entirely.

In this guide, you'll learn how to create a re-engagement campaign to help you save as many contacts as you can, and at the end you'll weed out contacts who could affect your inbox delivery

Planning

Plan out how far apart you want to send your emails. Most re-engagement campaigns can be executed in less than two weeks.

Gather all your assets before starting to re-engage, to make sure all pieces work in conjunction and have similar branding and messaging.

It's best to run re-engagement campaigns 1-2 times per year, but feel free to plan to cleanse your list before you run an important campaign, such as before the holiday season.
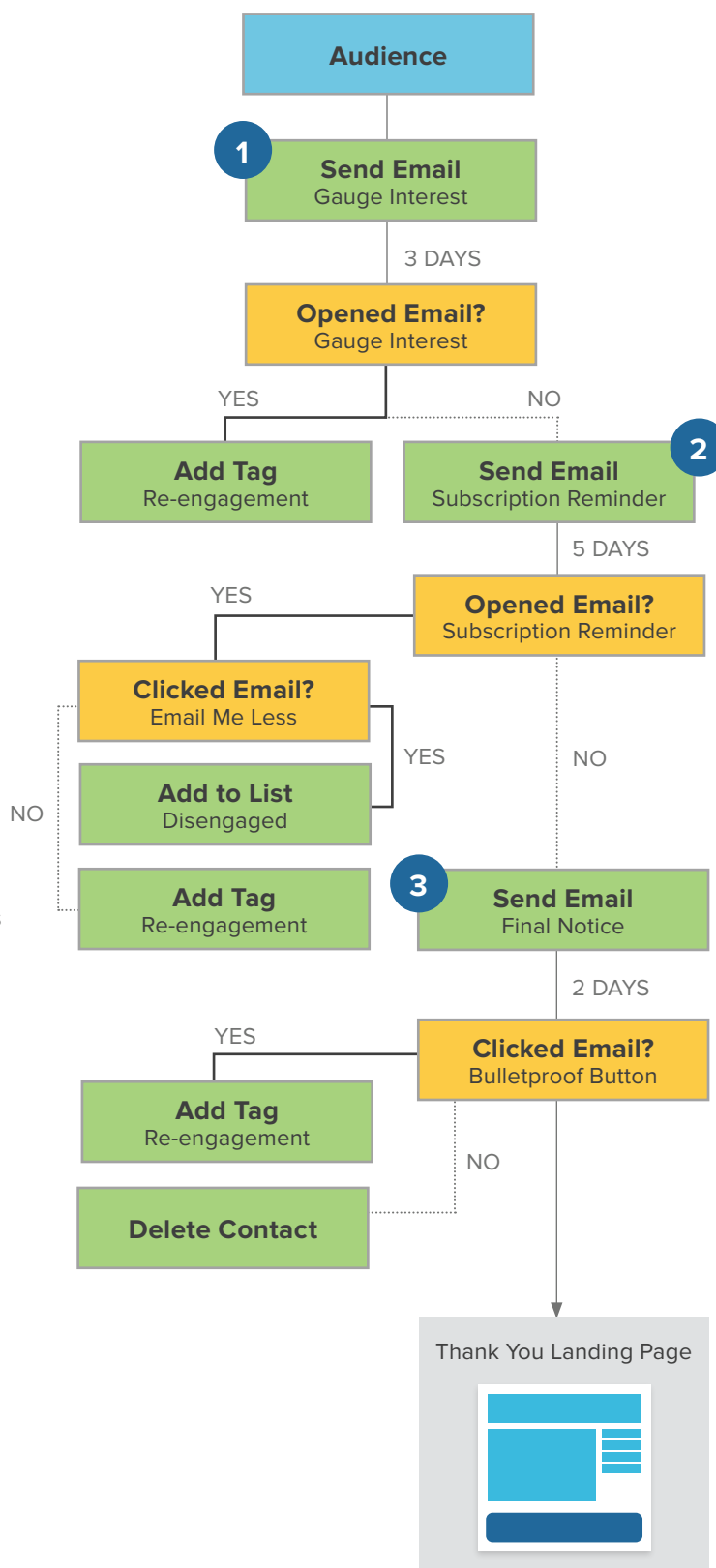
Re-engagement Tags enable you to easily group contacts in your system. By tagging people as "Re-engagement," you can track whether the re-engagement campaign saved a contact that eventually converted.

Create and Gather Your Assets

Determine an Incentive: An item of value to your contacts. It could be a discount code, a white paper, best practices—any asset that your contacts find useful.

Thank You Landing Page: Once people click your bulletproof button* confirming that they want to stay on your email list, you want to make sure they know it was successful. The link will redirect to a landing page that thanks them for continuing to subscribe to your emails.

1 GAUGE INTEREST EMAIL: An email similar to your usual emails, but with a new, creative subject line to draw in unengaged readers. Include an incentive to reward the contact for opening the email, and remind them of your value and why they signed up in the first place. If subscribers open this email, keep them on your regular list, but add a tag so you can track over time whether they eventually converted. If they do not open, send them on to the "Subscription Reminder" email.

2 SUBSCRIPTION REMINDER EMAIL: An email with a subject line reminding subscribers that they haven't engaged in a while (e.g., We Miss You, It's Been a While, Are We Still Friends?). This email will have a little more urgency and be more explicit in emphasizing to subscribers that they signed up for your emails and haven't been opening for a while. Include the incentive again in this email, and also a place to opt out or receive fewer emails. (TIP: using a text link is best, so it's easy to unsubscribe, but doesn't scream OPT OUT HERE!) If the subscriber opens the email, keep the contact on the main list. If they ask to be put on an email with less frequency, move them to a "disengaged" list. If they do not open, send the "Final Notice" email.

3 FINAL NOTICE EMAIL: This is your final attempt to cast your net over subscribers who may be infrequently engaging but are still interested. This email will include a bulletproof button (see notes), and if the contact doesn't click to stay on your email list, they will be removed. Everything in this email should point to that call to action: click it, or lose it. Do not distract the reader with an incentive in this email.

Audience

1 Send Email
Gauge Interest

3 DAYS

Opened Email?
Gauge Interest

YES — NO

Add Tag
Re-engagement

2 Send Email
Subscription Reminder

5 DAYS

Opened Email?
Subscription Reminder

YES

Clicked Email?
Email Me Less

Add to List
Disengaged

YES — NO

Add Tag
Re-engagement

NO

3 Send Email
Final Notice

2 DAYS

Clicked Email?
Bulletproof Button

YES

Add Tag
Re-engagement

NO

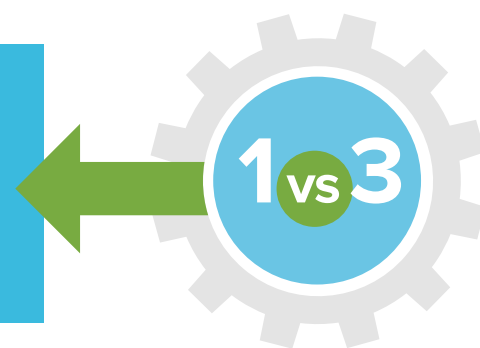**Delete Contact**

Thank You Landing Page

Pro Tip: If contacts don't take the bait in your re-engagement workflow, you have a few options. iContact recommends deleting them from your list entirely, but sometimes that's a hard bullet to bite. Alternatives are to put them on a drastically reduced sending schedule, maybe only a few times a year for your big sales, or to rest them for six months before reintroducing them in a nurture campaign.

ADDITIONAL INFO

- Even if you don't currently have marketing automation software, it's still possible to implement a re-engagement campaign. We recommend cleaning your list 1-2 times per year. This guide was created with people using marketing automation in mind, but the same principles apply for users with email-only systems. **The strategies are the same: you just need to manually create a list of non-openers over a period of time, send the emails in one-off blasts, and build your own landing page.**

- If you are using marketing automation software, **make your re-engagement campaign continuous, so you're constantly scrubbing your list to keep it squeaky clean** (with minimal work!). This simply requires creating a segment that constantly checks for users who haven't opened an email within the designated time period.

- Our example of this kind of workflow is email based—**but you can also gauge the engagement level of your contacts by putting checks in your workflow** to see if a contact visited your website or social media sites.

- ***A bulletproof button is a button for your call to action that is built with code instead of images.** This allows contacts to see and click the button even if their images are turned off.

Pro Tip: A Disengaged workflow has a lower frequency than your regular mailing schedule. For example, if you send three times a week, send to that list only once a week. If you send monthly, consider only once a quarter.

Example: Higher Education

A university collected a sizable list of contacts from alumni memberships, events, and donations. The school typically sends out emails weekly about upcoming events, continuing education, and asking for donations. Lists are segmented by sports interest, continuing education, and general alumni.

First Steps: Create Assets

- Incentive Item: For each audience segment it is trying to re-engage, the University creates special incentives: discounts on a sporting event ticket, a coupon for the campus store, and a discounted rate for a series of continuing education classes if subscribers sign up by a specific date.

- Thank You Landing Page: After subscribers choose to stay on the mailing list, they are redirected to a university-branded page with a confirmation that the contact's continued re-subscription went through. This page also has buttons with links to university social media platforms.
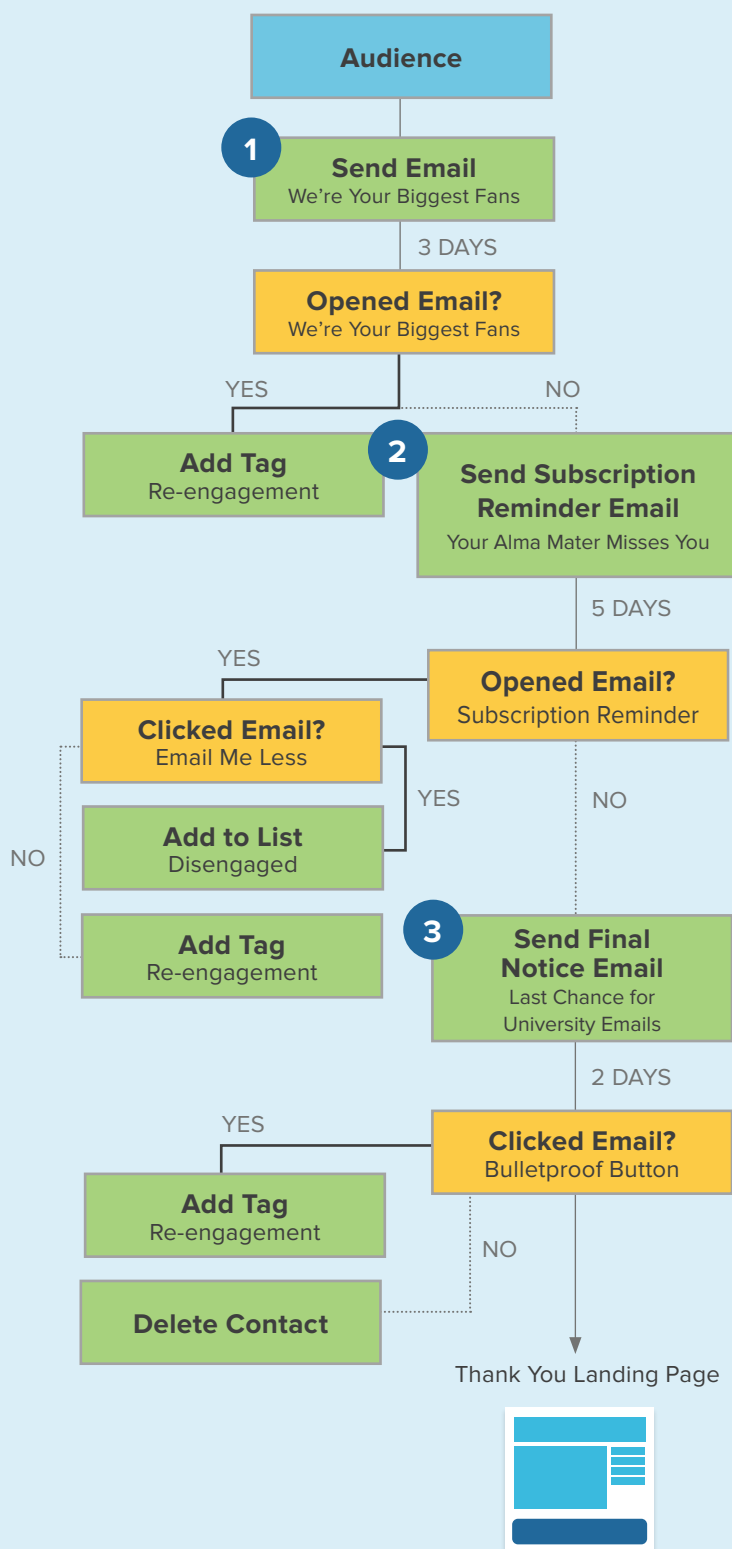
Higher Education Workflow

1 GAUGE INTEREST EMAIL: The university sends an email with an intriguing subject line, such as, "A Gift from Your Alma Mater" or "We're Your Biggest Fans." This first email includes the incentive, as well as 1-3 pieces of content, such as a story of the university's involvement in the community, a guide on how to watch games when the team is away from home, a list of upcoming events on campus, or highlights of major research accomplishments by professors. If subscribers open this email, they stay on the university's regular list, but have a tag added so the university can track their online behavior as they interact with the brand. If subscribers do not open, the university sends the "Subscription Reminder" email.

2 SUBSCRIPTION REMINDER EMAIL: The university uses more persuasive subject lines, such as "Still Interested in Updates from XYZ College?," "Your Alma Mater Misses You," or "You're Subscribed to Alerts from XYZ College." Include the same incentive from your first email, as well as a text link to unsubscribe or receive email less frequently. If subscribers open the email, the university keeps the contacts on its main list. If the subscriber asks to be put on an email with less frequency, then they are moved to a "disengaged" list. If the subscribers do not open, they are sent the "Final Notice" email.

3 FINAL NOTICE EMAIL: The messaging for this email is urgent. The university uses subject lines such as "Last Chance to Receive XYZ College Emails," or "Your Subscription Is About to Expire." This email includes a bulletproof button at the top of the email. The subscriber *must* click the button in order to stay on the university email list.

Audience

1 Send Email
We're Your Biggest Fans

3 DAYS

Opened Email?
We're Your Biggest Fans

YES — **Add Tag** Re-engagement

NO — **2 Send Subscription Reminder Email** Your Alma Mater Misses You

5 DAYS

Opened Email?
Subscription Reminder

YES — **Clicked Email?** Email Me Less

YES — **Add to List** Disengaged

NO — **Add Tag** Re-engagement

NO — **3 Send Final Notice Email** Last Chance for University Emails

2 DAYS

Clicked Email?
Bulletproof Button

YES — **Add Tag** Re-engagement / **Delete Contact**

NO — Thank You Landing Page

Example: Finance Company

A group of financial advisors has a list of current and past clients that they email weekly with information about stocks they like that week, with segments by age. The recommendations vary based on whether the subscriber is a new, younger investor, or is older and closer to retirement.

First Steps: Create Assets

- Incentive: The financial advisory group creates incentives such as a free consultation, a guidebook on investing, a white paper on managing a 401(k), a quick guide for young investors, another guide for those who are closer to retirement, etc.

- Thank You Landing Page: After subscribers choose to stay on the mailing list, they are redirected to the financial advisory group's branded page with a confirmation that the contact's continued subscription went through. This page also has buttons with links to social media platforms or other relevant links.

Finance Company Workflow

1 **GAUGE INTEREST EMAIL:** The financial advisory group sends an email with an intriguing but professional subject line, such as, "We Picked This Stock Just for You" or "Your Portfolio Growth Goals Are Within Reach." Along with the incentive in this first email, they include some high-performing blog posts, and contact information for the subscriber's specific advisor (via merge fields). If subscribers open this email, they stay on the regular list, but have a tag added for tracking purposes to see how they interact with the brand later. If subscribers do not open this email, they are sent the "Subscription Reminder" email.

2 **SUBSCRIPTION REMINDER:** Re-engagement campaigns can be a place to be creative with subject lines, depending on the context and whether it's appropriate to your brand. People don't usually appreciate jokes about their finances, so the financial advisory group has to be careful not to misplace their creativity. They try to create intrigue while staying on brand with subject lines such as, "Do You Find Our Suggestions Valuable?," "XYZ Financial Doesn't Want to Clutter Your Inbox," and "Your Money's on the Line: Do You Want to Continue Updates from XYZ Financial?" The financial advisory group includes the same incentive from the first email, as well as a text link to unsubscribe or receive email less frequently. If clients open the email, they stay on the main list. If a client asks to be put on an email with lower frequency, the contact is moved to a "disengaged" list. If the client does not open, a "Final Notice" email is sent.

3 **FINAL NOTICE EMAIL:** The messaging for this email is urgent and makes it clear that the client will be removed from the regular mailing list, but not from account-specific notifications. The financial advisory group uses subject lines such as, "Don't Miss Out on Portfolio Advice" or "Your Financial Advice Emails Will Be Discontinued." This email includes a bulletproof button at the top of the email. The contact *must* click the button in order to stay on the email list.

Audience
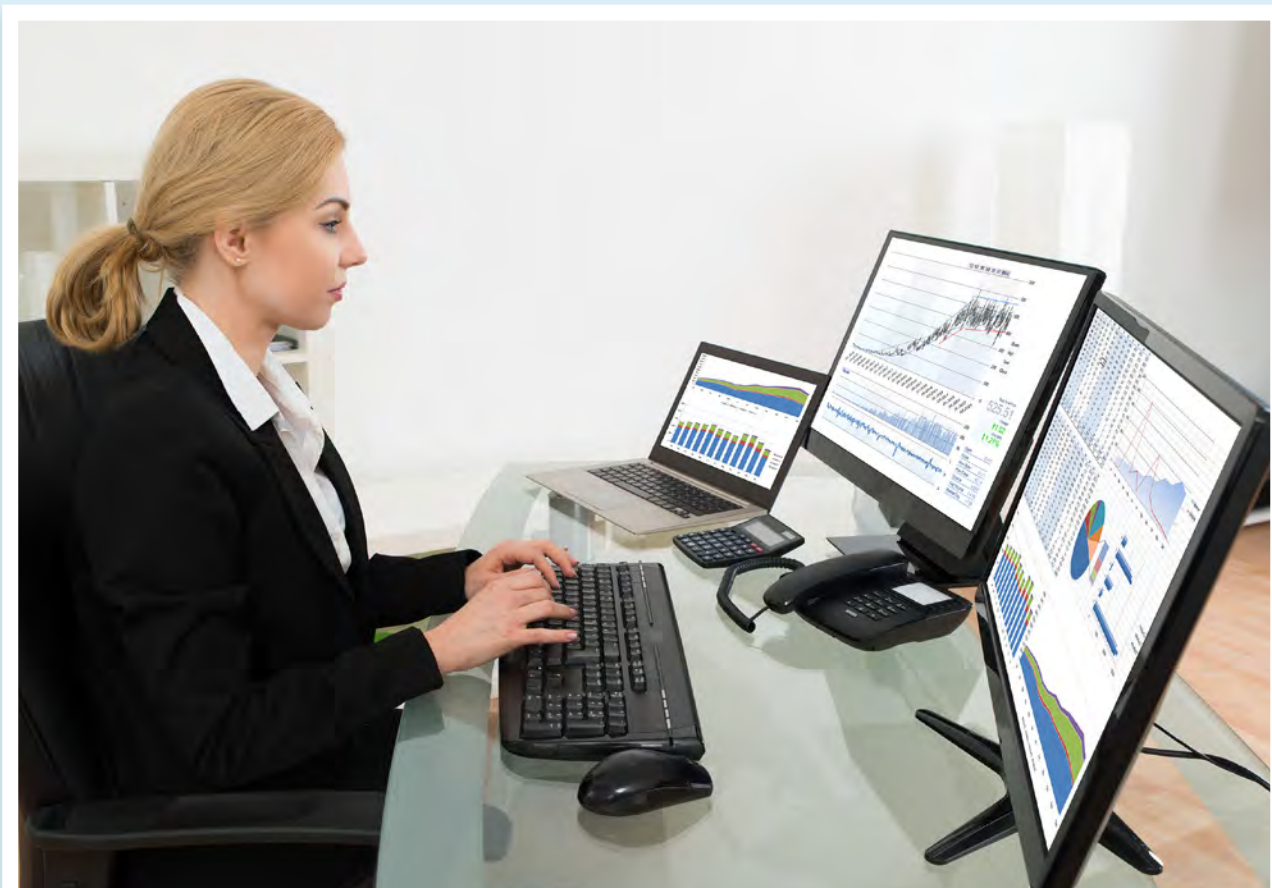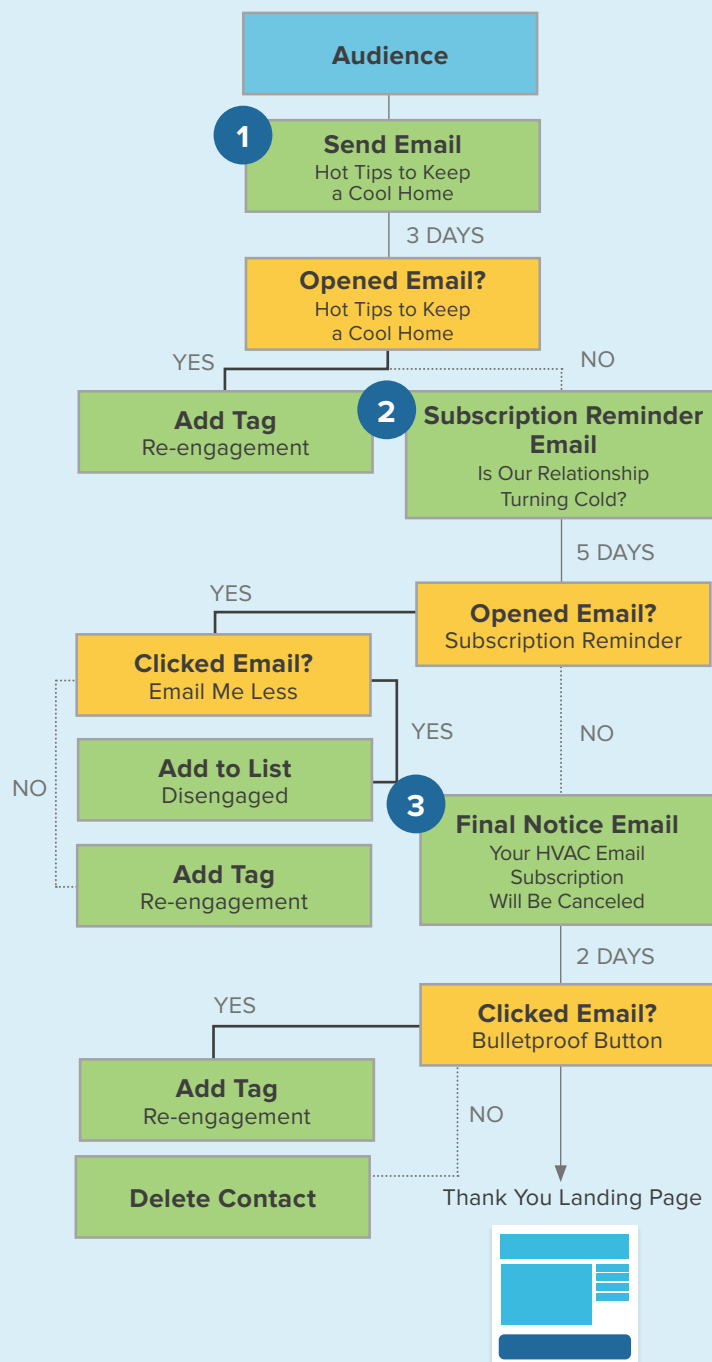
1 **Send Email**
Your Portfolio Goals
Are in Reach

3 DAYS

Opened Email?
Your Portfolio Goals
Are in Reach

YES   NO

Add Tag
Re-engagement

2 **Send Email**
Subscription Reminder
You're Subscribed to
Financial Advice Weekly

5 DAYS

YES   **Opened Email?**
Subscription Reminder

Clicked Email?
Email Me Less

NO   YES   NO

Add to List
Disengaged

3 **Send Email**
Final Notice
Don't Miss Out
on Portfolio Advice

Add Tag
Re-engagement

2 DAYS

YES   **Clicked Email?**
Bulletproof Button

Add Tag
Re-engagement

NO

Delete Contact

Thank You Landing Page

Example: Service/Maintenance Company

A heating and air company collects the email addresses of everyone who uses its service or submits a request for a quote on its website. The list has two main segments: commercial and residential. The company's main challenge is connecting with customers and staying top of mind until its services are needed.

First Steps: Create Assets

- **Incentive:** The company creates a number of incentive options: a free five-year maintenance plan with the purchase of a new HVAC system, a tip sheet for conserving energy year-round, and a guide on general maintenance tips to get the most out of your system (how to use a thermostat efficiently, what types of air filter you should use, etc.).

- **Thank You Landing Page:** After subscribers choose to stay on the mailing list, they are redirected to a company branded page with a confirmation that the contact's continued subscription went through. This page also has buttons with links to social media platforms or other relevant links.

Service/Maintenance Company Workflow

1 **GAUGE INTEREST EMAIL:** This email is fairly similar to the company's regular email messages and has interesting subject lines, such as, "This Deal Is Hot... So Your House Doesn't Have to Be," "Hot Tips to Keeping a Cool Home," or "Calm, COOL, and Collected: Strategies for Energy Efficiency." If subscribers open this email, they stay on the HVAC company's regular list, but are tagged to track their activities or segment at a later date. If subscribers do not open, they are sent the "Subscription Reminder" email.

2 **SUBSCRIPTION REMINDER:** The HVAC company uses this email to remind clients that it helped them in the past, with subject lines, such as "Is Our Relationship Turning Cold?," or "Is XYZ Company Still Welcome in Your Inbox?" For potential customers who have not yet used the service, but perhaps requested a quote or haven't signed a contract yet, the HVAC company uses subject lines such as "Are You Still Concerned About Your Heating and Air System?" or "Is HVAC One of Your Hot Concerns This Year?" The same incentive from the first email is included, as well as a text link to unsubscribe or receive emails less frequently. If subscribers open the email, they are kept on the main list. If a subscriber asks to be put on an email with less frequency, the contact is moved to a "disengaged" list. If a subscriber does not open, a "Final Notice" email is sent.

3 **FINAL NOTICE EMAIL:** The messaging for this email is the most persuasive. The HVAC company uses subject lines such as, "Last Chance to Stay on XYZ Company's Mailing List," or "Your XYZ Company Email Subscription Will Be Canceled." This email includes a bulletproof button at the top of the email. The contact *must* click the button in order to stay on the email list.

Audience

1 **Send Email**
Hot Tips to Keep a Cool Home

3 DAYS

Opened Email?
Hot Tips to Keep a Cool Home

YES — **Add Tag** Re-engagement

NO — **2** **Subscription Reminder Email** Is Our Relationship Turning Cold?

5 DAYS

Opened Email? Subscription Reminder

YES — **Clicked Email?** Email Me Less

NO — **Add to List** Disengaged — **Add Tag** Re-engagement

YES — **Add to List** Disengaged

NO — **3** **Final Notice Email** Your HVAC Email Subscription Will Be Canceled

2 DAYS

Clicked Email? Bulletproof Button

YES — **Add Tag** Re-engagement

NO — **Delete Contact**

Thank You Landing Page