

Enhance Customer Experience with

# **TIMELY & WELCOMED TRIGGERED ACTIONS**

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# What are Triggered Actions?

**Consumers in the experience economy expect the brands they interact with across industry verticals to recognize them as the same individual across every engagement touchpoint, and deliver experiences that demonstrate a deep, personal understanding with consistent relevance.**

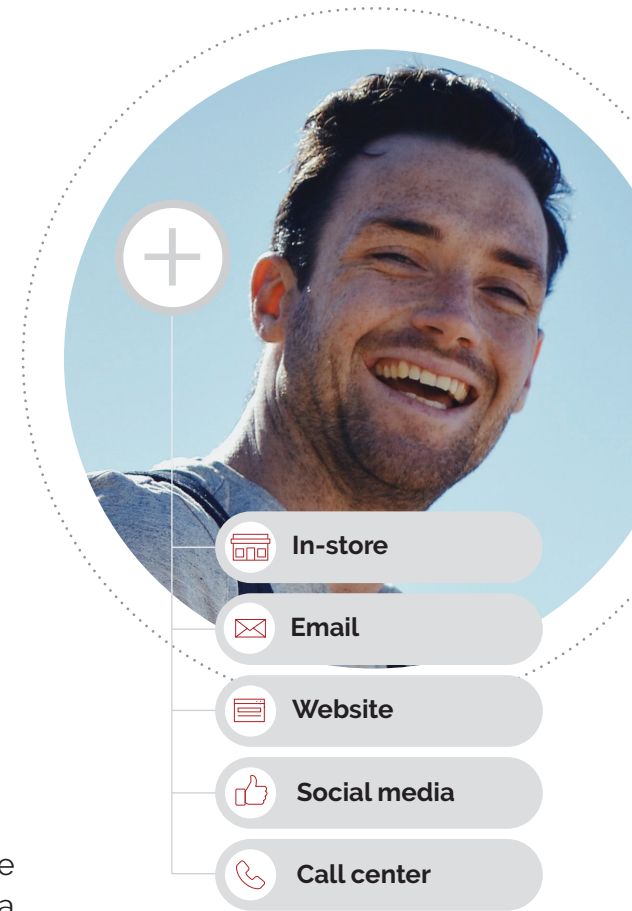


**In a Harris Poll survey commissioned by Redpoint, 43 percent of consumers cited a brand's knowledge of the consumer as the same individual across all touchpoints (in-store, email, website, social media, call center, etc.) as one of the most important ways a brand make customers feel like the experience is personalized<sup>1</sup>.**

One way to demonstrate a recognition of an individual across all touchpoints is through the delivery of a triggered action. An automated response based on one or a series of calculations, a triggered action is an “if/then” response mechanism that carries on a conversation with a customer. Triggered messages are welcomed and often expected by the consumer. With a triggered action, a brand responds to either 1) an action taken by a consumer or 2) an external event that affects a consumer, such as severe weather, an inventory change or a flight delay.

A timely response to the action or event—an abandoned shopping cart reminder, a prescription fulfillment notification, an alert to a flight or hotel room booking change—indicates to the consumer that a brand prioritizes customer needs and a frictionless customer journey.

These triggered actions are generally welcomed by customers because they are delivered within the context of their journey. In the healthcare space, sending an email notifying a patient they're due for a preventive screening is one example of a triggered action tied to the patient's healthcare journey.





## Triggered Actions: A Breakdown

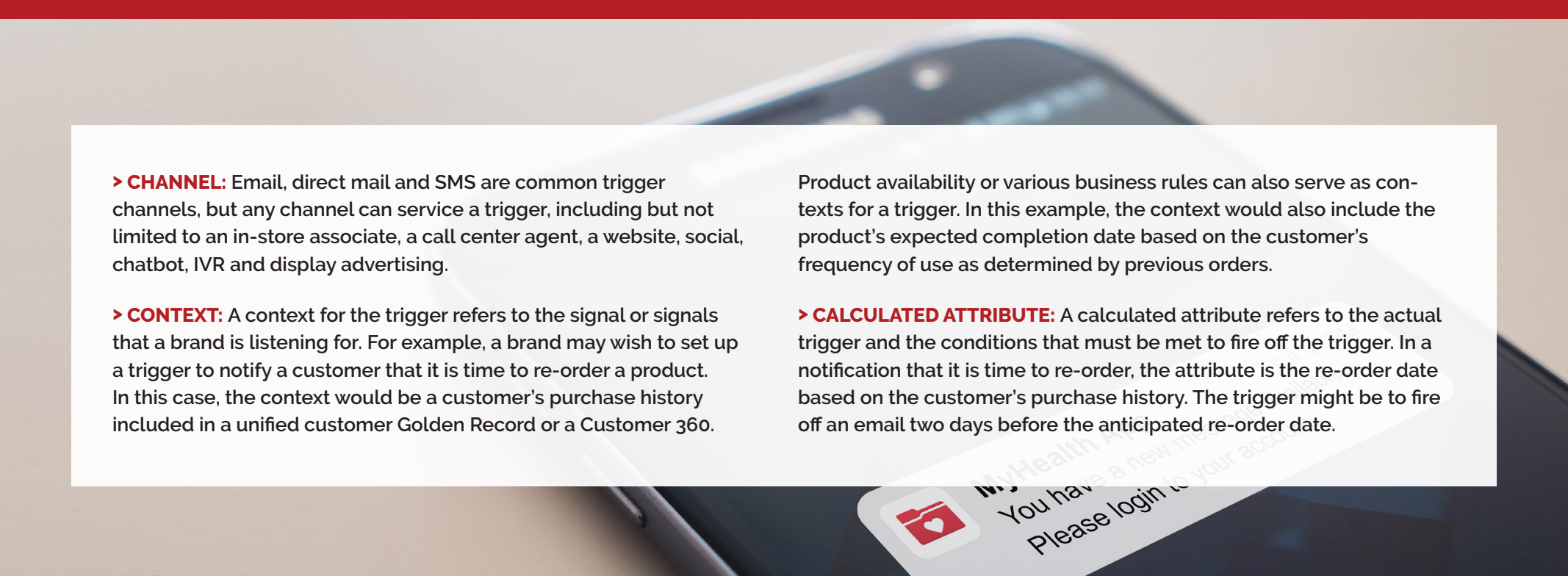
Triggered actions—alternately referred to as triggered events—originated as application logic that executed on specific events in a relational database, if/then calculations that triggered when a record was added, modified or deleted.

As part of a marketing automation tool, triggered actions evolved as a way to enhance customer experience because they align with today's dynamic, non-linear, unpredictable customer journeys. That is, a traditional buying journey of **awareness > consideration > decision** is rarely straightforward. With a triggered action, a brand responds to an individual customer in the right context regardless of how the journey unfolds.

**Effective responses require that a brand continuously listen for customer signals, evaluate if those signals meet the trigger criterion and activate the trigger response if the qualification is met.**

A triggered action can range from simple to complex, from single channel to omnichannel, and from a standalone trigger to a series of triggers spanning a customer journey. Trigger events share certain characteristics: a channel that services the trigger, a context for the trigger and a calculated attribute or attributes related to the trigger metrics.



A close-up, slightly blurred image of a smartphone screen. The screen shows a notification from a health app. At the top, it says 'My Health App'. Below that, it says 'You have a new message' and 'Please login to your account'. There is a red heart icon in a white square on the left side of the notification.

> **CHANNEL:** Email, direct mail and SMS are common trigger channels, but any channel can service a trigger, including but not limited to an in-store associate, a call center agent, a website, social, chatbot, IVR and display advertising.

> **CONTEXT:** A context for the trigger refers to the signal or signals that a brand is listening for. For example, a brand may wish to set up a trigger to notify a customer that it is time to re-order a product. In this case, the context would be a customer's purchase history included in a unified customer Golden Record or a Customer 360.

Product availability or various business rules can also serve as contexts for a trigger. In this example, the context would also include the product's expected completion date based on the customer's frequency of use as determined by previous orders.

> **CALCULATED ATTRIBUTE:** A calculated attribute refers to the actual trigger and the conditions that must be met to fire off the trigger. In a notification that it is time to re-order, the attribute is the re-order date based on the customer's purchase history. The trigger might be to fire off an email two days before the anticipated re-order date.

While triggers may have started as simple "if/then" decisions, the decision tree for how they're used to enhance customer experience (CX) today often has many branches. Evaluations are often based on a high volume of online and offline data, and there may be competing triggers that need to be arbitrated.

With a notification that it's time to re-order a product, a customer might satisfy every condition to receive the re-order email, but if the product the company wants to offer is not available when those conditions are met, that will automatically stop the trigger from firing.

A multi-trigger campaign will designate set timeframes and actions between triggers, such as triggering a second email (or SMS, direct mail, Facebook, etc.) if there wasn't a click-through on the initial email. Listening queues can also be optimized to evaluate and qualify customers in a certain timeframe, depending on the business goals or whether a threshold number of qualified customers has been reached. For example, for an abandonment shopping cart, one trigger qualification might be to send an email only for those customers who have not previously abandoned a shopping cart in the last 30 days, lest customers try to game the system, abandoning carts just to receive an email offer.

## Triggered Actions and a Relevant CX

Trigger events have gained traction in the delivery of a hyper-relevant CX because they're effective. Shopping cart abandonment is perhaps the most well-known trigger example, applicable to retail certainly, but also travel, financial services and media. It's a universal pain point, with about 7 in 10 customers who fill an online shopping cart failing to complete the transaction. Yet automated cart abandonment emails triggered off the event have a 45 percent open rate, a 21 percent click-through rate and an 11 percent conversion rate<sup>2</sup>. According to Omnisend, a trigger series of three emails results in 69 percent more orders than a solitary email campaign<sup>3</sup>.

By using a fully robust Golden Record in an email trigger campaign, a brand can increase relevance by incorporating a next-best action with the triggered communication. A brand might, for instance, analyze the abandoned items and determine the perfect complementary product based not just on the shopping cart activity but on browsing sessions and other behaviors. The follow-up email could then include an offer for a specific product relevant to an individual customer.

Brands can also qualify triggers to a select audience. A car rental agency, for example, could use geofencing capabilities to waive a gas refill for any premier customer within a certain radius of the airport, sending a "Enjoy your flight. This one's on us" push notification to the mobile app. Conversely, the trigger could be set up for a customer deemed a high churn risk.

In research from a Harris Poll survey, 82 percent of consumers surveyed said that they are loyal to brands that demonstrate a thorough understanding of them as a unique customer (up from 77 percent two years prior)<sup>4</sup>. In this context, triggered actions are effective tools in any nurture campaign to help move a customer journey forward. By setting up triggered actions, a brand shows that it maintains a vested interest in strengthening a relationship with a customer by providing value in a tactful way. Done well, triggered actions make customers feel valued beyond a transactional basis. That value, received in the form of a highly relevant customer experience, translates to loyalty, higher lifetime value, better brand appreciation and, ultimately, more revenue.

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# How Do Marketers Use Triggered Actions?

Triggered actions may be tied to a business objective such as retention, acquisition and expanding customer share. Others may be intended to increase customer satisfaction and drive long-term loyalty. An example might be triggering an SMS to let a hotel guest know that a room is ready for early check-in. Or a utility company notifying customers about a scheduled shut-off.

Tied to a business objective, or as a simple communication, a triggered action as a marketing tool reinforces that a brand is invested in the customer. At its core, an effective triggered action is centered on the customer's perspective—not the marketer's.

To listen for signals and create conditions that must be met to fire off a trigger, marketers must know what to listen for. In addition to business and situational events, listening for signals from a customer's perspective means having a firm idea of customer intent, behaviors, preferences and actions. Knowing how the customer is moving through a customer journey provides the meaningful signals, which can include what web pages the customer has viewed, whether they've contacted customer service, initiated a return, booked a flight, submitted a product or service review or broken a geofence. With an ear-to-the-ground, if you will, marketers are attuned to respond in real time to help progress a customer journey, resolve an issue or otherwise enhance CX by offering a hyper-personalized experience in the right moment and on the right channel.

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## Examples of common triggered action use cases in retail, healthcare and travel/hospitality:

### Retail



Consumer frustration with receiving irrelevant information from brands is high. In a Dynata survey of retail consumers, 70 percent reported receiving mistargeted information at least once a month, and 24 percent said they received mistargeted information daily. Regardless of the frequency, more than half (51 percent) of consumers said receiving mistargeted information *negatively impacts* their overall customer experience with a brand<sup>5</sup>. Engaging consumers with targeted, relevant information based on the consumer's own actions (or inactions) and within the context of an individual customer journey is why retailers adopt triggered action use cases.



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1. **Life Events** – Popular segment-based triggers are based on milestones and life events, such as a birthday, anniversary, birth, graduation, etc., where the context is a Golden Record and the calculated attribute is the celebration date. A familiar example is a Happy Birthday email that could include a personalized offer.
  2. **Geofence** – In addition to the example of a car rental agency waiving a gas refill, for retailers a geofence trigger can be set up for when a customer walks into (or drives by) a retail location, with an SMS or mobile app notification presenting a coupon redeemable within a certain timeframe.
  3. **Purchase threshold** – A retention campaign could include a trigger or set of triggers to notify a customer who has reached a monthly/yearly purchase amount that the customer is now eligible for a higher loyalty tier, a one-time offer or another benefit. As with other triggers, eligibility might be determined by any set of calculated attributes, such as a customer's current loyalty status or predicted churn rate.
  4. **Browsed webpage** – An example of a trigger where eligibility may be determined by inaction. If the context for a trigger is a customer's online browsing session, a calculated attribute might be a customer not taking a follow-up action despite showing interest in a specific product. A trigger might then be an SMS sent two days later with an offer for the product.
  5. **Welcome back** – As part of a nurture campaign, a trigger can be set up to welcome back a lapsed customer who logs back into a website after a certain timeframe.
  6. **Abandoned shopping cart** – The common action-based trigger can qualify customers based on calculated attributes that might include the value or number of items abandoned.
  7. **Transaction** – An online transaction will typically include several triggers, such as adding a customer who has provided a shipping address to a catalog list. Other triggers based on a transaction include thank you emails, delivery information and updates and product recommendations. .



## Travel & Hospitality



Everyone who has received a text message from an airline about a flight delay has experienced a triggered action from a travel and hospitality company. With any travel, there is a certain amount of anxiety from being away from home. Having to place one's trust in a travel brand is an important aspect of the customer relationship. Will the flight arrive on time so I won't miss my business meeting? Did the hotel book the right conference room? Easing customer anxiety is a key benefit of using triggered actions in travel and hospitality.



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1. **Availability notification** – Using a Golden Record as a trigger context, companies leverage consumer preferences to notify them when a vacation package is created or becomes available that they've expressed an interest in, such as a three-day cruise departing from a nearby city.
  2. **Change in travel** – A flight delay notification is just one of many status updates that travel companies use to keep customers informed and up-to-date about any change to upcoming booked travel; delays, gate changes, severe weather and seat openings among them.
  3. **Pre-trip assistance** – In addition to confirmation emails or notifications, a series of triggered actions can serve as status check-ins leading up to a flight, a hotel stay or vacation package. One month out, a direct mail piece may provide a suggested itinerary or a rundown of popular tourist destinations. One week out, an SMS may provide a long-term weather forecast for the destination location. Two days out, a mobile app push may include an image of the rental car and the pickup location.
  4. **Enhanced stay** – As with upcoming trips, travel companies use triggered actions to keep current guests apprised of important information, changes or on-site deals. If a hotel room is not ready for an early check-in, a guest might be notified via SMS as soon as the room is ready. Loyalty members may be notified via a mobile app push about an extended happy hour on the lido deck. Departing hotel guests may be notified about a late check-out option if their room is there is a vacancy.
  5. **Personalized offers** – Travel companies regularly trigger off a customer's online behavior to send personalized content— catalogues, direct mail, email—based on the types of vacation packages or trips a customer expresses an interest in. A customer who visits a homepage for a guided national park tour might receive a full color catalog of the park's trails, maps and iconic monuments with an offer for a discount during off-peak season. Calculated attributes for triggers based on website activity can be qualified based on the level of customer interest as determined by a number of clicks, number of visits, length of online session, etc.
  6. **Upgrades** – Like a purchase threshold in retail, a customer who reaches an annual or lifetime expenditure may be eligible for a higher loyalty tier, a free upgrade or another frequent traveler perk. Using transactions as the trigger context, the calculated attribute can be set to only include a set expenditure, or if coupled with a separate retention campaign it may also include a customer's churn risk level.
  7. **Geofence** – A rental car agency using a geofence to trigger a gas offer is one of an innumerable set of use cases for geofence to enhance the travel customer's experience. An arriving hotel guest who breaks a geofence receives an SMS with an offer for a free continental breakfast upon arrival. A guest who breaks a geofence of the new rooftop restaurant is invited to complete a survey in exchange for a discount on their next visit.



## Healthcare



With the caveat that protected health information (PHI) can only be used for marketing purposes with a patient's authorization, healthcare organizations (healthcare providers, health plans, pharmaceutical and medical device companies, etc.) routinely use triggered actions to engage patients and policyholders with relevance throughout an individual healthcare journey.

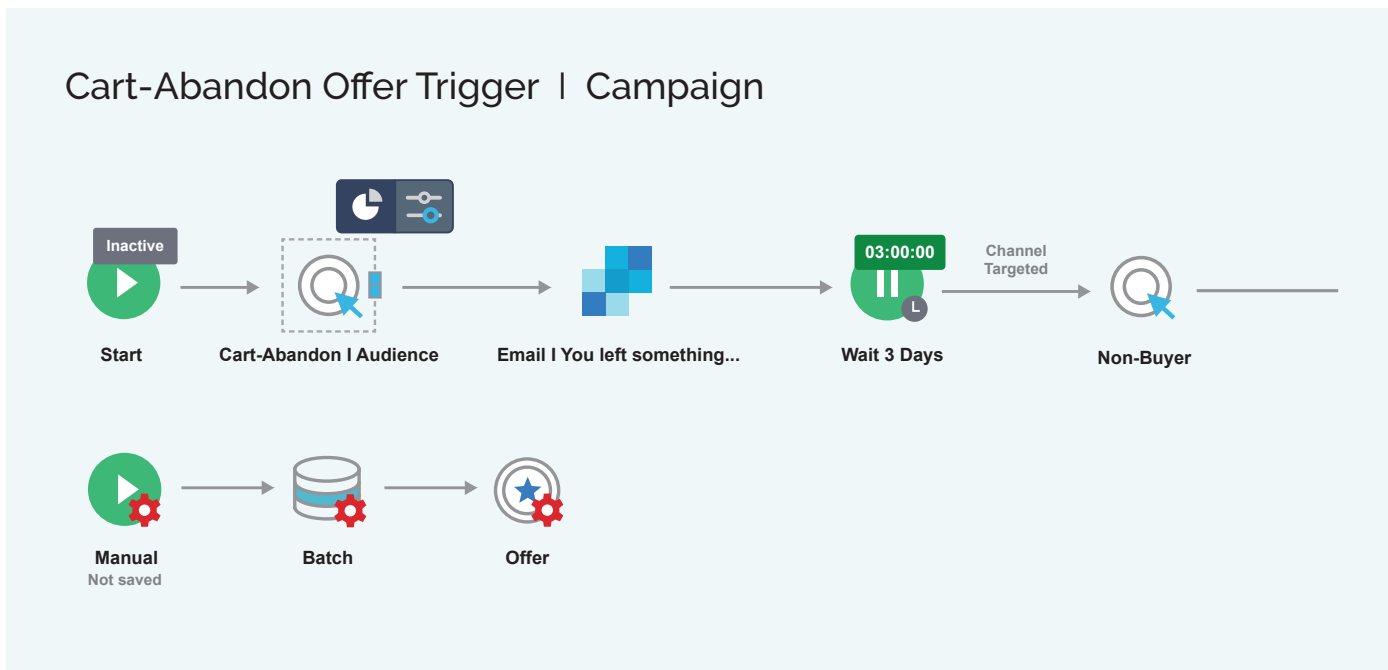




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1. **Prescription refill** – Like a re-order notification, a prescription refill reminder uses a Golden Record as context and a re-order date as the calculated attribute.
  2. **Therapy adherence** – A scheduled procedure or appointment may be used to qualify a patient for a triggered action (a call, email, etc.) with guidance, as an adherence reminder or to offer assistance.
  3. **Closing care gaps** – Using a patient's age, existing risk factor and/or other parameter as a calculated attribute, a trigger can fire to let a patient know they're due for a preventive screening. With a Golden Record as a context, the triggered action can be skipped for a patient who has already scheduled the screening, or for another reason needs to be suppressed.
  4. **Policyholder changes** – Marriage, divorce, birth or adoption, a move, or a change in income are all qualifying events that may trigger special enrollment periods in Affordable Care Act (ACA)-complaint major medical plans. A listening queue using a Golden Record as context for the trigger will identify a policyholder's enrollment eligibility. If the calculated attributes are met, a trigger will send the appropriate response—a form, letter or other information advising the policyholder of the change.
  5. **Operational change** – Providers frequently use triggers to let their patients know about a change in office hours, that a new doctor is accepting new patients, that a new outpatient clinic has opened nearby, or to notify patients about other operational changes. In the same way, a health plan can use triggers to inform members that a doctor is no longer in their network or the opposite, that a doctor they used to see is back in their network.
  6. **Observation result events** – Lab results and imaging reports are examples of observation result events that typically require follow-up. With a comprehensive medical record serving as the trigger context, calculated attributes may trigger on thresholds, anomaly detections or another result.
  7. **Browsing activity** – A patient with a chronic condition browses a healthcare organization's website for treatment information. Calculated attributes that include pages viewed, documents and/or videos downloaded may qualify a patient for additional outreach or personalized education content.

# Triggered Actions with Redpoint

With Redpoint, triggers are initiated through changes in the state of an attribute, as detected by an intelligent orchestration engine that looks for moderations in data at any interval. For instance, a nurture campaign may trigger an email based on a customer's retention score, which is continually updated in an operational database. A trigger campaign is set up on an interactive canvas (See *Figure 1*). Using a rule designer, a user can input a command to send a retention email when the score reaches or falls below a certain level. Another command might set up an interval, dictating that the database look for those changes every minute, hour, day, week or another timeframe.



**FIGURE 1:** An interactive canvas for a cart abandonment trigger. The start in this example is the act of the abandoned cart, which may take into account one or multiple calculated attributes that qualify the audience. In the drag-and-drop interface, a user determines an initial trigger—here, an email—followed by a second trigger for a qualified audience (the non-buyer).

## Triggered Actions and a Next-Best Action

A triggered action and a next-best action are not synonymous, as next-best actions may be generated with or without a trigger, or next-best actions may be generated in conjunction with a trigger. They are highly complementary, and both can be leveraged in designing customer journeys in a myriad of ways. Here are two examples:

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**1.** The audience that qualifies for the trigger is comprised of customers for whom the action (SMS, email, etc.) is the next-best action in their customer journey. A model may segment out an audience consisting of customers ranked most likely to churn, for example. A dynamic segment packaged and usable in any channel might then be used in a trigger campaign for the call center; when anyone in the segment contacts the call center, an agent will offer a subscription discount (or whatever action that has been determined to reduce churn).

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**2.** The content of the trigger may vary based on the updated Golden Record. An email trigger, for example, could have a half dozen or more content options for a loyalty trigger campaign. One customer receives an offer for hiking boots, another for skis and another for a tent—depending on previous purchases, affinity scores, browsing history and other attributes and aggregations that make up a Golden Record. In this instance, while an email might be chosen in the rule designer as a next-best action for a segment, the chosen content further personalizes the customer experience. A next-best action, in this case, is encompassed within the triggered action.

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➔ One reason a triggered action and next-best action are often lumped together is because of the logic that the underlying purpose of a trigger is to enhance the customer experience. Why set up a trigger at all unless the action—the email, the call, the SMS—in some way helps the customer or improves customer satisfaction? The line may blur at times, but what triggered actions and next-best actions have in common is that they are both ultimately created on behalf of the customer.





For more on triggered actions with Redpoint or to schedule a demo, visit [www.redpointglobal.com](http://www.redpointglobal.com).

## Conclusion

In a 2022 Dynata survey that explored consumer perceptions about brand engagements, 74 percent of customers said that a personalized experience was key to their connection with a brand, demonstrated by a brand making the customer feel valued and understood<sup>6</sup>.

Triggered actions help forge such an understanding. A well-placed, well-timed trigger is a show of solidarity with an individual customer, a brand's demonstration that it has the customer's back with helpful information, a welcome reminder, a highly relevant offer. Beyond how a brand markets to them, customers think of CX as every interaction they have with a brand. An omnichannel experience is one in which sales, service, support and operations all fully recognize the customer no matter where they are in the journey and no matter the touchpoint. By providing that consistent voice across channels, triggered actions can be an important part of the brand promise, a sign that the brand is with you, the customer, for every moment that matters.

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### Endnotes

<sup>1</sup> **Redpoint Global & Harris Poll 2019** <https://www.redpointglobal.com/resources/addressing-the-gaps-in-customer-experience/>

<sup>2</sup> **Moosend Cart Abandonment Stats** <https://moosend.com/blog/cart-abandonment-stats/>

<sup>3</sup> **Omnisend Cart Abandonment Email Best Practices** <https://www.omnisend.com/blog/cart-abandonment-emails-the-best-practices-and-stats-infographic/>

<sup>4</sup> **Redpoint Global & Harris Poll 2021** <https://www.redpointglobal.com/resources/harris-poll/>

<sup>5</sup> **Dynata Survey 2022** <https://www.redpointglobal.com/press-releases/70-of-consumers-receive-mistargeted-information-from-brands-at-least-once-a-month/>

<sup>6</sup> **Dynata Survey 2022** <https://www.redpointglobal.com/press-releases/74-percent-of-consumers-believe-brand-loyalty-is-about-feeling-understood-and-valued-not-discounts-and-loyalty-perks/>

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