Customer engagement plan framework

Continuous engagement with your customers is a must. But in order to engage, not just interact with your customers, you’ll need a solid plan in place.

This template will help you to plan up to four different customer engagement campaigns to run simultaneously.

| **Step 1: Relationship mapping** | |
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| This step involves understanding the key customers you want to target, think about:   * Who will help you achieve your goals/objectives? * What is the quality of the relationship between the customer and the company? * Who brings value to the company? * Who is most/least engaged?   Try to only target the highest quality customers, who are most likely to be receptive to your messages. We suggest around 40 customers, but you can adjust based on your capabilities. | |
| **Step 2: Research** | |
| If you don’t already have a clear understanding of your customers you should dedicate time to research in these key areas:   * Key details about the customer’s business/industry/demographics. * Challenges and priorities of the customer. * Where your solution fits their problem.   This information will come in handy to split up your customers into campaign groups. | |
| **Step 3: Split into groups** | |
| The next step is to use the information gathered to split your customer list into groups. We suggest having four groups of around 10 customers, but this can be adjusted. Try to split these customers based on a goal you think they would be receptive to, for example growing revenue.  Try to split customers into distinct groups with different goals, this can be as broad or specific as you need. This will help you to target your content to fully engage with each customer. | |
| Group A | Goal:  Customers: |
| Group B | Goal:  Customers: |
| Group C | Goal:  Customers: |
| Group D | Goal:  Customers: |
| **Step 4: Timeline and content planning** | |
| Below is a rough plan for a 24 week engagement plan for your four customer groups. This timeline can be spread out over a longer period or accelerated depending on your capabilities. You can fill out more of what the content will be for each group in the spaces too! | |
| Week 1 | Group A - Intro + Next step  Group B - Intro + Next step |
| Week 2 | Group C - Intro + Next step  Group D - Intro + Next step |
| Week 3 | Group A - Reply/chase up + CTA  Group B - Reply/chase up + CTA |
| Week 4 | Group C - Reply/chase up + CTA  Group D - Reply/chase up + CTA |
| Week 5 | Group A - Personalized message  Group B - Personalized message |
| Week 6 | Group C - Personalized message  Group D - Personalized message |
| Week 7 | No communication (use to plan) |
| Week 8 | No communication (use to plan) |
| Week 9 | Group A - Reply/chase up + CTA  Group B - Reply/chase up + CTA |
| Week 10 | Group C - Reply/chase up + CTA  Group D - Reply/chase up + CTA |
| Week 11 | Group A - Reach out on LinkedIn  Group B - Reach out on LinkedIn |
| Week 12 | Group C - Reach out on LinkedIn  Group D - Reach out on LinkedIn |
| Week 13 | Group A - Personalized message  Group B - Personalized message |
| Week 14 | Group C - Personalized message  Group D - Personalized message |
| Week 15 | No communication (use to plan) |
| Week 16 | No communication (use to plan) |
| Week 17 | Group A - Reply/chase up + CTA  Group B - Reply/chase up + CTA |
| Week 18 | Group C - Reply/chase up + CTA  Group D - Reply/chase up + CTA |
| Week 19 | Group A - Message + Next step/CTA  Group B - Message + Next step/CTA |
| Week 20 | Group C - Message + Next step/CTA  Group D - Message + Next step/CTA |
| Week 21 | No communication (analytics and planning for next campaign) |
| Week 22 | No communication (analytics and planning for next campaign) |
| Week 23 | Group A - Final reply/chase up + CTA  Group B - Final reply/chase up + CTA |
| Week 24 | Group C - Final reply/chase up + CTA  Group D - Final reply/chase up + CTA |