

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

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