

Continue the Conversation from Email to Website to Logged-in App



When communicating, marketing or selling to customers, you likely rely on a variety of channels – web, in app, mobile, email, social media etc. Obviously, it's a good thing when someone clicks on a campaign and lands on your site, but what happens if they don't immediately act on your offer? With Evergage, you can "re-target" interested customers when they return to your site or the next time they log in to your application.

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| Category | Customer Success | Vertical | Technology |
| Topic | "Re-target" interested customers the next time they visit your site or access your application | ID # | 230 |

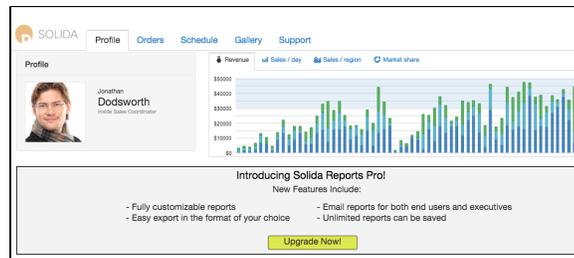
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Example

A customer is placed into a segment based on his engagement with a certain feature of your application. The feature has an upgradeable component which you promote to the user via an email offer. Interested in learning more – and potentially purchasing the upgrade – he clicks the emailed offer and is taken to a landing page highlighting the benefits of upgrading. He's interested, but doesn't have much time to everything in detail so closes out of the window and takes a mental note to come back later.

After a couple of days, the upgrade offer is a distant memory. Fortunately, the user he does need to access some reports in your application. He logs into the account and, because of the interest he had previously shown in the new feature, the offer is presented to him when he logs into the app – reminding of the fact that he was considering purchasing the upgrade.



Segment

There are two segments needed for this play:

1. **Came from Upgrade Marketing** - all people that interacted with any of the "upgrade" messages (within Facebook, LinkedIn, Google Adwords or an email)
2. **Purchased an Upgrade** - all people who purchased an upgrade (e.g., "Purchased Reports Pro"). This segment will end up being excluded from the campaign

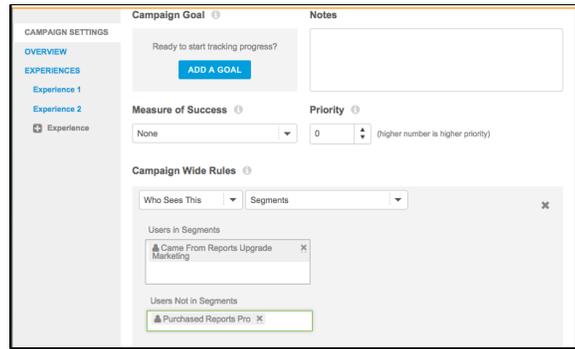
Measure

The goal is to get the customer to buy the upgrade. We would add that as a campaign goal.

Setup

Start this beginner-level campaign by setting up Evergage third party campaigns. This will create campaigns when someone lands on your site from an email, Facebook, LinkedIn, Google Adwords etc. In this case, when someone clicks on an emailed offer, the UTM parameters will be used to create a new campaign in Evergage.

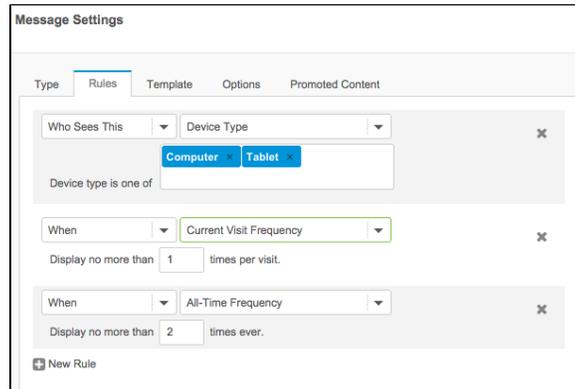
You then create a segment of all the people that interacted with any of the "upgrade" messages (within Facebook, LinkedIn, Google Adwords or an email), and include that segment in the message. You would also exclude anyone who has purchased an upgrade (e.g., "Purchased Reports Pro").



Now, create two experiences that will show messages on the main customer login screen:

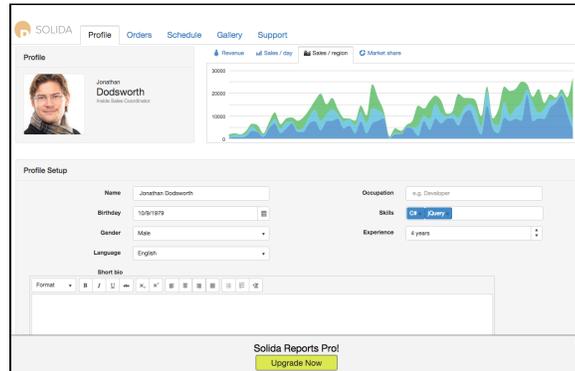
Experience 1 - Visits 1 and 2

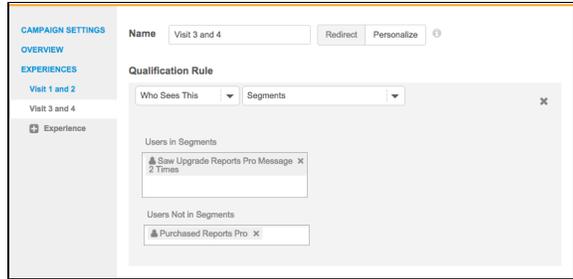
You should only show this message the first two times someone logs in and one time per visit.



Experience 2 - Visits 3 and 4

Now, create a smaller, less intrusive message and show that the next 2 times someone logs in.





i Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

- Set up the email provider in 'Settings > Integration > Third Party Settings' (note this is only available for administrators)
- The campaigns for that email provider will be visible in the 'campaigns' area, in the 'email vendor' folder as soon as someone lands on the site from an email from that provider
- Create a campaign based on the specific email campaign you want to target, either at a campaign level or a message level (rule based) 'Who sees this > referring campaign > user was referred by external campaign'

i Reference Materials

The following articles from the *Evergage Knowledge Base* will provide process steps to help you execute this play:

- [Create or Edit a Web Campaign](#)
- [Create a Segment](#)
- [Add Rules for Campaigns, Experiences, and Messages](#)
- [Integrations](#)