ACQUISITION USE CASES

Fulcrum is a very powerful Consumer Data Platform that allows you to capture user data in real-time and then leverage that information into actionable marketing tactics that convert. Here are a few specific use cases that can be applied to the marketing activity of Acquisition.

These use cases are within the context of a user coming to the site for the first time. The goal would be to increase engagement, get them to self identify (email address via newsletter signup, account create, etc.)

LOCAL REFERRAL - Identify the user's geographic area and level of engagement (page views, overall lead score), then serve them client testimonials and promote specific companies in their local market.

UPGRADE ACCOUNT/SUBSCRIPTION - Identify individuals who have been actively using their account and provide a personalized message and/or offer for a product or service upsell.

PERSONALIZE CUSTOMER SERVICE - Coordinate with a specific customer service representative based on location, account type, and more. You can even place a "contact your rep" tile on the page that links to a specific account rep.

CONTENT RECOMMENDATION - Provide a user with content where they have shown an interest. For example, if they downloaded a type of whitepaper or read a blog post, you can activate a rule to show them more related content on the site to view and/or download.

UPSELL & CROSS-SELL - Establish a segment of users who meet certain criteria to serve them up offers for upsell and cross-sell opportunities. Establishing the criteria for these personalization segments also allows other users to automatically flow into these segments once they meet the criteria.

REDUCE RISK OF CHURN - Gain a better understanding of users who are not currently using or engaging with your site and/or service (or identify users who have drastically reduced their engagement). These users could be a risk for churn. Provide them with incentives and information to get them back to the site or use features they have not activated to keep them engaged.

PRODUCT RECOMMENDATION - Knowing the types of products that individual users are viewing and purchasing, you can provide custom product recommendations which align with their needs and interests.

PERSONALIZED PRICING - Treat individuals differently to maximize revenue per user. You can allow for individual users to receive different pricing levels and/or discounts. Someone who is a preferred customer can see an offer specific to their persona and background.

NEW CONTENT/PRODUCT UPDATE - Notify users on-page or off-page about new features, products and content that they have not seen yet. Make their site visit meaningful with personalized updates to keep them engaged.

ACCOUNT MESSAGES - Provide individuals with specific updates on their account, like renewal dates, accumulated points, and more. Understanding precisely who is on the site means you can communicate with them in a highly customized manner.

CUSTOMER STATUS - Provide users with a real-time status of their account standing. Show points, levels or anything that is related to their account. All this data is updated inside Fulcrum in real-time so it can be displayed to the user.

CUSTOMER NOTIFICATION - Provide individual users with personalized information on their account. Orders, subscriptions, upcoming webinars, trade shows, and more.

PRODUCT/PROCESS FEEDBACK - As a user moves through the site you can ask "request feedback" on various processes in real-time. Getting feedback on the UI/UX can provide valuable feedback to reduce any user friction and increase engagement and conversion.

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CONTENT EVALUATION - Once a user downloads content or watches a video, you can ask them for their feedback on the content to help determine how relevant and valuable it is to all users.

MONITOR/MANAGE PRODUCT USAGE - Understand the level of product use within an app or client environment. Get data on how these areas are being used. Promote other areas and/or features that the user may have overlooked to maximize the value they get from your product or service.

EMAIL TRIGGERS - Send emails automatically based on specific actions users take (or don't take). These emails can push relevant content based on the persona of the individual user and/or their specific actions.

DIRECT MAIL TRIGGERS - Send a direct mail piece triggered by a specific action taken by the user on the site. You can also have direct mail sent to users who have not visited the site for a certain amount of time.

TIMEBASE NOTIFICATION - Display a specific notification to a user based on a timeline like a trial offer, free access, sale ending, etc.

CUSTOMER SERVICE - Personalize the home page with the info for a user's customer service rep. Display the name and contact information for that rep who has been assigned to a specific customer, improving the user experience.

PRODUCT OR SERVICE UPDATE - Instantly notify the customer upon arrival to the site of any pertinent information related to their previously purchased products and/or services with your company.

SPECIAL PROMOTION - Depending on the level of engagement with a product or service, you can offer a custom promotion for a specific individual. Discounts or upgrades can be customized to specific users through their user behavior.

LOCATION PROMOTION - Understand the geo location of a user and alert them about any specific local events, promotions, offers, etc. that are specific to their individual location.

REAL-TIME FEEDBACK - Gauge the user experience for various activities on your site (account create, purchase, sign up, etc.) by asking for an experience score immediately after the user completes the task. Getting feedback immediately after the event makes for more accurate feedback.

EVENT NOTIFICATIONS - Update users with real-time notifications such as a sale ending, new events on the calendar, and more.

CONTENT PROMOTION - Recommend specific content (e.g. a Blog tab and is rarely accessed) to a user based on their interests as a result of their site behavior as well as past product and/or service purchases and engagement.

REAL-TIME RECOMMENDATIONS - Provide users accurate product and/or content recommendations in real-time based on their actions. Recommendations can be modified as the user engages with content — all in real-time.

PRODUCT/SERVICE FEEDBACK - Inquire about recent purchases as soon as the user comes back to the site. Ask for feedback and/or ratings while the experience is still fresh in the user's mind.

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