

# Customer lifecycle campaign plan template

A customer lifecycle campaign plan is a structured strategy designed to deliver the right value, at the right time, across every stage of the customer journey.

This template is designed to help you:

- Accelerate time-to-value (TTV)
- Improve retention and adoption
- Drive expansion opportunities
- Build long-term customer advocacy

Use this framework to outline your campaign goals, stages, communications, and metrics, then tailor it to each customer segment or persona.

1. Campaign objective

What do you want to achieve with this lifecycle campaign?

Example:

“Improve product adoption among mid-market tech clients by 30% in the first 90 days of onboarding.”

2. Target customer segment

Which customer group is this lifecycle plan designed for?

Attribute	Description
Segment	Mid-market (100–500 employees)
Industry	SaaS and Fintech
Customer tier	Professional plan
Primary personas	Product Manager (daily user), VP of Ops (decision-maker)

3. Lifecycle stages overview

Outline the major phases of your customer journey and align them with goals, touchpoints, and metrics.

Stage	Goal	Key Touchpoints	Channels	Primary Metrics
Onboarding	Fast time-to-value	Welcome email, setup guide, kickoff call	Email, In-app, Zoom	Activation rate, TTV
Adoption	Product usage deepening	Feature tips, milestone alerts, webinars	Email, In-app, CSM call	Weekly active users, usage depth
Engagement	Foster loyalty & trust	Community invites, office hours, NPS survey	Email, Community	NPS, CSAT, engagement rate
Renewal	Ensure contract continuation	Renewal prep email, QBR, pricing review	Email, Zoom	Renewal rate, account health score
Expansion	Identify growth opportunities	Usage reports, upsell content, roadmap call	Email, In-app, CSM call	Expansion revenue, upsell rate
Advocacy	Turn into promoters	Case study request, referral program invite	Email, Community, Events	Referrals, testimonials, reviews

4. Campaign components per stage

Use the following format for each stage:

Stage: Onboarding

Component	Details
Theme	"Get value fast with a seamless setup experience."
Trigger	Customer signs contract or completes product login
Cadence	Day 0 (welcome), Day 2 (setup guide), Day 7 (check-in), Day 14 (survey)
Content	PDF setup guide, welcome video, interactive checklist, help docs
Owner	Onboarding CSM, Customer Success Ops
Delivery	Hybrid: automated emails + live CSM touchpoints

Stage: Adoption

Component	Details
Theme	“Use [Product] like a pro – unlock key features.”
Trigger	7 days post-login, limited feature use
Cadence	Weekly tips (4 weeks), monthly usage summary
Content	Tooltips, recorded webinars, feature checklists
Owner	CS Enablement Team, Product Marketing
Delivery	Automated in-app + nurture emails

Stage: Engagement

Component	Details
Theme	“Stay connected and unlock the full value of your partnership with us.”
Trigger	30+ days post-onboarding OR drop in usage OR post-QBR
Cadence	Monthly product updates, quarterly feedback check-in, event invites
Content	Customer newsletters, product roadmap updates, community invites
Owner	Customer Marketing, CS Manager
Delivery	Automated emails, Slack/community posts, optional CSM 1:1s

Stage: Renewal

Component	Details
Theme	“Let’s look back at your success and plan forward.”
Trigger	90 days before contract expiration
Cadence	Day -90 (renewal prep email), Day -60 (review call), Day -30 (follow-up)
Content	QBR deck, usage summary report, renewal proposal template
Owner	Account Manager, CS Director
Delivery	Email + live call + proposal document in CRM

Stage: Expansion

Component	Details
Theme	“Scale your success — discover what’s next.”
Trigger	6+ months of strong product use OR increased license demand
Cadence	Quarterly roadmap review + mid-year solutioning session
Content	Feature comparison charts, use-case playbooks, pricing tier overviews
Owner	CSM with input from Product or Sales Engineering
Delivery	Email + 1:1 strategy call



**Stage: Advocacy**

Component	Details
Theme	"Help others grow — share your success story."
Trigger	High NPS score, successful QBR, or recent renewal
Cadence	1–2 asks per year depending on customer maturity
Content	Case study request, G2 review prompt, speaker nomination
Owner	CS Leader, Customer Marketing
Delivery	Personalized email + follow-up from CSM

5. Measurement plan

Define how success will be measured across lifecycle stages.

Metric	Goal	Source
Activation rate	90% within first 10 days	Product analytics
NPS	>45	NPS survey tool
Renewal rate	>92%	CRM or CS platform
Expansion revenue	15% YoY growth	Billing/CRM
CSAT	>4.5 / 5	Support feedback

6. Tech stack

List tools supporting campaign execution and measurement.

Category	Tool Used
CRM	Salesforce
CS platform	Gainsight
Email automation	Customer.io
In-app messaging	Appcues
Survey & NPS	Delighted
Analytics	Mixpanel

## 7. Optimization & feedback loop

Use data and internal feedback to iterate.

- Run A/B tests on onboarding emails or nudges
- Hold internal lifecycle reviews with CS team monthly
- Incorporate customer feedback into campaign content
- Refresh assets every quarter based on usage insights

### Next steps

- ☐ Fill in your campaign objectives
- ☐ Define your lifecycle stages for each segment
- ☐ Document campaign assets and timelines
- ☐ Align with RevOps, Marketing, and Product teams
- ☐ Launch and review performance monthly