

Lifecycle Marketing Playbook

A strategic and tactical guide to how I build and scale lifecycle marketing programs across key stages: Lead → Onboard → Retain → Winback.

This playbook reflects how I think through segmentation, timing, messaging, and measurement—and how I work with cross-functional teams to execute.

LEAD (Acquisition Nurture)

Goal: Turn marketing-sourced leads into subscribers.

Trigger Logic

- User signs up but doesn't subscribe
- Entry triggered via Iterable list or custom event

Segmentation

- Source-based (e.g. paid vs organic)
- Device or OS-specific (for app download pushes)
- Repeat visitor vs. first-time

Personalization Rules

- Use first product browsed (via event data)
- UTM-based messaging ("Saw us on TikTok?")
- Incentive varies by lead age (e.g., 50% off if >7 days)

Key KPIs

- Lead-to-subscribe rate
- Time to conversion
- Offer usage rate

```
graph TD
  A[Lead enters flow] --> B{Visited site again?}
  B -- Yes --> C[Dynamic reminder email]
  B -- No --> D[Time-based incentive email]
  C --> E[Push with trending products]
  D --> E
  E --> F{Subscribed?}
  F -- Yes --> G[Exit flow]
  F -- No --> H[Winback segment]
```

ONBOARD

Goal: Set expectations, encourage first month satisfaction.

Trigger Logic

- Subscription start date or "first box shipped" event

Segmentation

- Plan type (Monthly, Quarterly, etc.)
- Gender or self-selected scent type
- Box customization status

Personalization Rules

- Feature tips specific to first item
- Dynamic shipping status or box preview
- Educational content ("How to layer scents")

Key KPIs

- First-month churn rate
- NPS score
- Open rate of onboarding touchpoints

RETAIN

Goal: Keep active subscribers engaged and loyal.

Trigger Logic

- Monthly shipment events
- Loyalty milestones
- Skipped shipment or downgrade warning

Segmentation

- Tenure tiers (1–3 months, 4–6, 6+)
- Engagement level (open/click history)
- Cross-shop behavior (visited add-ons?)

Personalization Rules

- Recommend new drops based on history
- "Since you liked X, try Y" content blocks

- Birthday, anniversary, or seasonal nudges

Key KPIs

- Active subscriber retention rate
 - Engagement score
 - Add-on revenue
-

WINBACK

Goal: Reactivate churned users or lapsed leads.

Trigger Logic

- Subscription cancellation event
- No activity for X days

Segmentation

- Cancel reason (price vs. product)
- Past purchase amount or add-ons
- Lapsed >30 vs >90 days

Personalization Rules

- Show new arrivals since last visit
- Offer resume discounts (if price-sensitive)
- Highlight value ("Here's what you missed")

Key KPIs

- Winback conversion rate
 - Time to return
 - Post-winback retention
-

Summary

This playbook is how I think—not just in flows and campaigns, but in terms of lifecycle logic, user intent, and long-term value. Whether I'm building the flow myself or partnering with engineers and analysts, this is the framework I lead with.

Let me know if you'd like to see code samples, email examples, or reporting templates that tie into these stages.