

# Retention Marketing with ChatGPT: A Case Study Approach (Example 2)

James Bake

## Explorable Exercise: Generating Challenge Ideas for Customer Segments

### Measurable Learning Objective:

Learners will generate creative re-engagement campaign ideas, evaluate them for alignment with customer needs, and refine the most promising idea.

### Scenario:

You are working for "TaskFlow," a project management SaaS platform that helps small businesses and solopreneurs stay organized. Recent engagement metrics show that many users have stopped creating or completing tasks on the platform after the first three months of use.

Your goal is to create a re-engagement campaign to encourage these users to rediscover the value of TaskFlow. You have access to basic customer insights:

- **User Segment:** Small business owners juggling multiple priorities.
- **Primary Challenges:**
  - Overwhelmed by the learning curve of new tools.
  - Struggling to see immediate results from task management.

### Instructions:

#### 1. Define the Goal:

Use ChatGPT to brainstorm campaign ideas to re-engage TaskFlow's users and remind them of its value.

- Example Prompt:

*"Generate three creative re-engagement campaign ideas for a project management SaaS business targeting small business owners who stopped using the platform after three months. Include specific goals, incentives, and recommended channels for each idea."*

#### 2. Generate Campaign Ideas:

Use your prompt to produce three ideas for re-engagement campaigns. Examples might include:

- A "5-Day Productivity Boost Challenge" where users learn one feature a day.
- A "TaskFlow Success Stories" email series showcasing how others achieved results.

- A "Personalized Productivity Audit" offered via a short survey.
- 3. **Evaluate the Ideas:**  
Assess the ideas based on:
  - **Feasibility:** Can the campaign be executed easily?
  - **Creativity:** Does it stand out to customers?
  - **Relevance:** Does it align with your customers' needs?
- 4. **Refine the Best Idea:**  
Choose the campaign idea that best meets the criteria. Refine it by adjusting your ChatGPT prompt. For example:
  - Specify a more targeted incentive (e.g., access to a productivity eBook or one-on-one coaching).
  - Focus on a specific tone for messaging (e.g., empathetic, motivational).
  - Select an engagement channel (e.g., email, in-app notifications).
- 5. **Example Refinement Prompt:**  
*"Refine the idea for a '5-Day Productivity Boost Challenge.' Focus on addressing time constraints by breaking tasks into 10-minute activities and delivering daily tips via email."*
- 6. **Submit and Compare:**  
Share your original prompt, ChatGPT's generated ideas, and your refined campaign.  
Review examples from other learners to see different approaches and refinements.

### **Assessment Question:**

What is the primary goal of a re-engagement campaign for current customers?

1. Teach them how to use the product for the first time.
2. Encourage ongoing engagement by offering specific incentives or goals.
3. Reward their loyalty with exclusive discounts.
4. Promote a new product or feature.

(Correct Answer: 2. Encourage ongoing engagement by offering specific incentives or goals.)