

Lifecycle / CRM

Role Definition

Builds strong relationships with current and potential customers to increase LTV. Drive increased engagement, loyalty, and customer satisfaction.

RevelOne Insight

Needs to deeply understand customer segments, needs, and behaviors throughout the lifecycle. Brings together this customer empathy with the analytic ability to measure and test programs that grow customer value. The growth in subscription businesses has required increased sophistication in these skill sets. Email has traditionally been the core channel here but mobile, notifications, text, and in-app messaging are increasingly important.

Section 1. Role Archetypes

The Quant

- Oriented to the data / quant side, comfortable with databases, analytics, and maybe SQL.
- Can uncover non-intuitive insights and opportunities through data, develops testing & optimization programs to increase loyalty and retention.
- Typically partners with others on more creative tasks.

The Storyteller

- A creative storyteller who understands the importance of brand & messaging.
- Sensitive to voice, copy, and visuals, as well as delivering a consistent experience across channels.
- Thinks about offers and messaging in context of product / brand story.
- Informed by data / analytics but may partner with quant specialists.

The Generalist

- General management skill set, looks at customer lifecycle from broader GM / strategy perspective.
- Multi-functional skills across brand, analytics, and project management; orchestrates specialists or vendors to execute a holistic approach.
- May come from MBA or consulting background.

The Technician

- Marketer who knows data flows, cross-channel user journeys and the engine needed for 1:1 personalization.
- Has worked with engineers and led custom work to bring together internal customer data with email / messaging platforms and analytics.
- Experience with complex journeys and products with interactions that span mobile, web, and inbox.

Section 2. Role Leveling

Common Titles

Customer Relationship Management (CRM), Engagement, Loyalty, Lifecycle, and Email.

Role Leveling Chart

Director/Head Of

- Brings strategic view of how customer engagement fits within overall market and company strategy.
- Likely spikes in path they came up through (segmentation or creative/production) but can manage across entire function to bring together integrated program.
- More senior level needed when program is at scale and customer segmentation and program sophistication increases.

- Can define tech requirements and work with engineering to implement.
- Manage a team of 5+ people (internal and external).

Manager

- A “doer” focused on execution and formulating insights and analyses.
- Likely spikes in one skill area (creative, offers/promotions or analytics) and will need support or development in others.
- Can project manage and give shape to projects in early stages given some direction and clear goals. Not yet focused on larger ideas or strategic program development.
- Good collaborator with cross-functional counterparts (e.g., creative, dev).

Section 3. Priorities & Skills

Instructions

RevelOne suggests that you select 3-5 top role priorities to properly focus the requirements for the role / search.

Role Priorities Chart

Design and document customer journey across platforms.

Segment users based on actionable insights and differences.

Develop personalized messaging and experience for user segments.

Define & implement CRM system and processes.

Identify / redefine KPIs for the business.

Create cohesive cross-channel contact and messaging strategy (e.g., email, mobile, remarketing) to engage, retain, and delight users.

Manage and optimize key channels such as email, push notifications, organic social, etc.

Increase LTV and reduce churn %.

Develop activation and churn reduction programs — key for freemium and subscription products.

Develop team and hire (people or agencies).

Additional considerations for discussion

- Company stage (complexity/scale of customer base)
- Vertical and company experience
- High or low consideration product
- Purchase is episodic or continuous
- Purchase model (individual, freemium, subscription)
- Channel mix and customer journey complexity

Instructions

Select the most desired skills. Consider priorities and skills holistically to ensure you seek skill sets that nest together in real-life candidates.

Skill Portfolio Chart

CRM & Analytics

User segmentation
Cohort analysis
Engagement metrics
(opens, clicks,
interactions)
Multivariate testing and
optimization
Subscription
management
CRM & DB
management

Creative & Messaging

Creative - visual, video,
copy
Editorial strategy &
calendars
Content marketing
Offers & promotions

Channels & Operations

Email, ESPs, mobile
notification platforms,
remarketing
Email Ops,
deliverability, marketing
automation
GDPR / DPA
Analytics - Google
Analytics, tags
HTML and some SQL

Key Metrics

- LTV
- Cohort metrics
- AOS
- Open rate
- CTR
- Churn
- ROI
- Win-back rate
- Conversion rate