



THE ESSENTIAL REFERRAL EMAIL GUIDE

How Refer-a-friend Uses Email

The beautifully designed and well-timed emails that the Extole platform sends are keys to your referral program success. This helpful guide to the referral marketing emails details the primary emails that power our programs. It also provides insight into how to think about each one. And, it's important to note that each email we send features:

CONSISTENT, ON-BRAND CREATIVE

Thanks to Extole's pre-built creative themes, every email will look great and match the look and feel of your referral program and your brand.

MOBILE RESPONSIVE DESIGNS

Because consumers open emails in general and share emails in particular on their mobile devices, it's imperative that every email you send looks and works great on mobile. Every piece of Extole creative, including email, is responsive.

RELIABLE DELIVERY

With email, the rubber hits the road at the inbox. An email sent but not inboxed is worthless. Extole's templates and technology work together for high deliverability.

CAN-SPAM COMPLIANCE

You could engage tens of thousands of your customer advocates with your referral program. It's essential that referral program emails follow CAN-SPAM requirements by honoring the preferences of everyone who participates.



PART 1: THE SHARE EMAIL

From: your advocate

To: her friends

When: at key moments of delight during the customer journey

Purpose: to share an authentic, personal recommendation that results in high-converting traffic to your site

When you let your existing customers use email to send personal recommendations about your brand or product, they will send compelling and powerful emails. In fact, **email is the highest converting referral channel** – more effective than sharing on Facebook, Twitter, or Instagram. It's also easier than a share link for referred friends to find later.

USED THOUGHTFULLY,
EMAIL HELPS BETTER CAPTURE
THE POWER OF YOUR ADVOCATES.



PART 2: THE ADVOCATE THANK YOU EMAIL

Email content tailored to what the customer is doing at a specific moment — purchasing, browsing, sharing, searching, reviewing — helps your customer achieve her goals rather than interrupts her. The same is true with refer-a-friend program emails; they should be aids. The next email we consider essential in any refer-a-friend setup is the thank you email triggered by an advocate's first share that actually helps your customer. Let's take a look.

From: your advocate

To: your new advocate

When: triggered by an advocate's first share

Purpose: to thank your new advocate for recommending your brand to her friends and to create an easy-to-find way for her to share again

Triggered when an advocate shares for the first time, the Advocate Thank You Email shows your new champion your appreciation. She's done something great for you and you should thank her. It's a small gesture that also serves a couple of other purposes. A good thank you email promotes more sharing because it features a strong "share more" call-to-action. Even if an advocate doesn't use it immediately, she'll know she has this thank you email to return to later.

Let's look at the design of this email. The share email, which we discussed last week is a personal recommendation from an advocate to a friend. It's most authentic and effective when it's lightly branded. **The Advocate Thank You email, on the other hand, is from your brand.** Therefore, it's appropriate for it to have richer brand imagery and tone.



Fuller branding is consistent with another aim of your referral efforts in general: make refer-a-friend feel like it's not a program at all. Instead, refer-a-friend should merge seamlessly with your customer's overall experience. So, the sender of emails from your brand to advocates should not come from your referral program. Instead, thank you emails should have the same sender as any brand email.

Similarly, our recommendation for the subject line is to avoid "welcome to the program" messaging. Instead, celebrate the first share, message it as an accomplishment, and generate excitement that encourages more sharing. If your brand favors emojis in your subject lines, don't hesitate to use them here too.

The body of the email should focus on generating excitement and warm feelings. With that kind of energy and with a reminder about the rewards your advocates and their friends can earn, **this email will encourage more sharing.**

THE ADVOCATE THANK YOU EMAIL
SHOWS YOUR NEW CHAMPION
YOUR APPRECIATION.



PART 3: THE ADVOCATE STATS EMAIL

The next email serves an often overlooked but important need: keeping advocates engaged. Imagine, an advocate shares and is thanked...then, what happens? Well, until a referred friend converts, often there's no communication to the advocate.

We see this all the time with refer-a-friend built in-house. Instead of creating delight and engagement with your advocates, the silence creates a void. It's the equivalent of not sending an order shipped email. You wouldn't do that to your customers, and we don't do that to your advocates. Instead, Extole creates a useful – in terms of content, timing, and functionality – communication that your advocates really appreciate and engage with. We call this email the advocate stats email.

INSTEAD OF CREATING DELIGHT AND
ENGAGEMENT WITH YOUR ADVOCATES,
THE SILENCE CREATES A VOID.

From: Your Brand

To: Your Advocate

When: After sharing

Purpose: Increase engagement and sharing, answer common questions

As its name suggests, the advocate stats email provides advocates with an update on their shares, the impact of their shares, and the status of rewards. The data in this email answers the critical questions that advocates have after they send recommendations: did my friend respond and where is my reward?

The more an advocate shares, the more often they'll want their stats. Our version of the advocate stats email goes out more frequently to more active advocates and less frequently to those who share occasionally.

Finally, this email lets advocates do two important things:

1. It makes it easy for them to share again, either with their link or with a click back to the on-site share experience.
2. It prompts them to remind friends they've already shared with to check out your brand or products.

That simple follow-up is a powerful conversion driver.



PART 4: THE FRIEND REMINDER EMAIL

At this point, you've perhaps picked up on a theme: **the best referral experiences create their own moments.** That's perhaps an obvious proposition. And when applied to the overall structure of the program, it means that the program design needs to account for non-linear customer journeys, from sharing to conversion.

Here's an example... I shared my favorite new fashion brand with a friend. I know she'll love it and will appreciate the reward. I also know she's easily distracted. My share message is likely to be glossed over while she's speeding through email, Instagram, Bumble, and who knows what else. It happens all the time. I still love her though.

Extole's platform gives advocates (and the marketers supporting them) two useful approaches for making the most of this very common scenario. Both rely on an email we call 'The Friend Reminder' email.

From: your advocate

To: her friends

When: after the initial share – either on-demand or scheduled by the advocate

Purpose: to reinforce the initial share message and emphasize that the recommendation is meaningful and true

As the name suggests, this email lets advocates send a reminder email to their friends as a follow-up to their initial share. It's a gentle nudge for people like my friend who love the latest styles, are easily distracted, or may not have been in the mood to purchase when I first shared.



Extole's platform gives marketers two ways to make friend reminders a natural part of the advocate experience. The first is to let advocates opt-in to the reminder when they first share. A simple checkbox when advocates share by email – “send my friends a reminder email in X days” – is easy and popular. We make the time period configurable so that marketers can offer the option after a short interval or a long one. By making it configurable, you could also include it in an A/B testing strategy. No matter the interval, it's smart to not send a reminder to friends who've already converted.

The other way we let advocates trigger the friend reminder email is in our advocate stats dashboard. Like our share experience itself, the stats dashboard is creative for your site that gives existing advocates information about the status of their shares and rewards. It's usually embedded in your site's “My Account” section and is a natural place to let advocates re-send their share messages.

While the main goal of this email is to increase conversions, it also increases advocacy by creating a thoughtful experience for customers who want to share your brand with their friends.



PART 5: MAIL AFTER PURCHASE

A key moment of delight in referral marketing happens when a friend responds to the recommendations of an advocate. Creating more of these moments is the purpose of the email we discussed in our last post. But the idea of key referral moments also applies to program marketing, the basic activity of making sure your customers know about their ability to send recommendations and can easily refer when they want to.

A well-timed marketing email dedicated to refer-a-friend will prompt the sharing that leads friends to visit your site. If you combine this fact with knowledge that the most meaningful

THE VALUE OF EVERY RESPONSE IS INCREDIBLY
HIGH – HIGHER THAN ANY POST-PURCHASE
ACTIVITY – MAKING MAIL AFTER PURCHASE HIGHLY
EFFECTIVE IS A CENTRAL FOCUS OF EXTOLÉ'S
PLATFORM AND OUR CUSTOMER SUCCESS TEAM.

moment is when someone experiences your product or service, then a well-timed post-purchase email to everyone who has recently purchased can have a big impact.

Using online or in-store purchase to trigger an email asking customers not to rate or review a product but to recommend it through a referral is one of the top performing calls-to-action in any referral program. The value of every response is incredibly high – higher than any post-purchase activity – so making mail after purchase highly effective is a central focus of Extole’s platform and our Customer Success team.

From: your brand

To: every recent purchaser

When: triggered by and scheduled after conversion

Purpose: to build on the excitement and experience every customer has after she’s purchased

Not surprisingly, the subject line of a post-purchase email needs to be great. Why? Because after her purchase, your customer gets a lot of email and not all transactional emails get read. So a punchy email subject line helps cut through the noise. My favorite subject line for this email was StitchFix’s “Want Free Clothes?”. It’s catchy. It’s short. It’s unique. And, as [you can see in this video](#), it works!

Part of the success of the Stitch Fix email and any post-transaction request for referrals is the timing. Extole’s platform let’s you schedule the email to go out a specified number of days after the purchase. Retailers tend to allow enough time for products to be shipped, experienced in real-life, and loved. So their settings are usually a couple of weeks after purchase. In some cases, it may make sense for the interval to be even longer. But don’t wait too long to inform your recent customers of their ability to refer. It’s a big benefit and one they are likely keenly interested.

Finally, we recommend that the tone of this email be celebratory. Favor language that conveys enthusiasm, sharing, friendship – the foundations of advocacy and the fuel of your referral program. So thank them for their transaction, celebrate their loyalty, encourage referrals by returning to your site. And don’t forget to include their personalized share link so that they can distribute it directly!



PART 6: THE REWARD EMAIL

Imagine, you shared a brand or product with someone that you know will love it. You may or may not find out that your friend made a purchase. But then, there in your inbox, you spy an email not just thanking you for sharing but rewarding you for connecting a friend with your favorite brand. That's a great feeling!

And that's also why the reward email serves a couple of more purposes beyond just communicating a reward. It drives traffic from your rewarded advocate to your site and quite possibly an additional purchase. And, it encourages more sharing too. So let's take a more detailed look.

THE REWARD EMAIL DRIVES TRAFFIC FROM YOUR
REWARDED ADVOCATE TO YOUR SITE AND QUITE
POSSIBLY AN ADDITIONAL PURCHASE.

THE ADVOCATE REWARD EMAIL

From: Your Brand

To: Your Advocate

When: After one of her referred friends makes a qualifying purchase

Purpose: Deliver an earned reward, encourage another purchase from your advocate, spark more sharing

This email is one you want to have your advocate open without fail. So, make sure the headline is descriptive and explicit that they've earned a valuable reward. Don't forget the preview text so that you're taking advantage of everything at your disposal to make sure this one gets opened. If you were to ever use a subject line emoji, this would be the place. Make sure it renders in mobile, and consider add-to-wallet capabilities for in-store redeemable rewards. In other words, do everything you can to make sure this is a great email and that your customer can take advantage of the reward.

Wait, you may be thinking, is it really that important or isn't there kind of a benefit if this email goes unnoticed? After all, we're losing margin if the person opens the email and uses the reward, right? Wrong! You absolutely want your advocate to get and use this reward. First, this is an advocate – your best customer! You don't want to let her down, deliver a bad experience, or hope for breakage at her expense. Secondly, the use of that reward represents an additional purchase. That's an obvious value to your business and to her. Third, you do want to put her through the hassle or incur the expense of a phone call to your customer support team asking for her reward. Finally, it is absolutely the case that she's going to be more inclined share again if she had a great experience earning a reward and using it. Refer-a-friend is about moments of delight. And this is the Super Bowl of referral delight! Play to win!!

REFER-A-FRIEND IS ABOUT MOMENTS
OF DELIGHT. AND THIS IS THE SUPER BOWL
OF REFERRAL DELIGHT!

Finally, make sure you mention that more rewards await and that you make it easy to share again by including the advocate's share link and a link back your onsite sharing experience. A great experience creates more engagement, loyalty, and sharing.

When you're using an external reward like an Amazon gift card or an open-loop card and in certain cases with an internal reward like a coupon code or account credits, you're also rewarding friends using email. This is often the case in financial services, for example. And, as is the case with the advocate reward email, the friend email creates a powerful moment.

THE FRIEND REWARD EMAIL

From: Your Brand

To: A Referred Friend

When: After a referred friend earns a reward

Purpose: Deliver the reward and encourage advocacy

When you're using an external reward like an Amazon gift card or an open-loop card and in certain cases with an internal reward like a coupon code or account credits, you're also rewarding *friends* using email. This is often the case in financial services, for example. And, as is the case with the advocate reward email, the friend email creates a powerful moment.

One main difference with this email, however, is that you have a huge opportunity to give this new and now rewarded customer an easy path to becoming an advocate. Sharing and its benefits should be highlighted even more than in an advocate reward email. Even if this referred friend doesn't share when she opens the email, you definitely want her to keep this email in her inbox so she can find it to share when the moment strikes later!

YOU HAVE A HUGE OPPORTUNITY TO GIVE
THIS NEW AND NOW REWARDED CUSTOMER
AN EASY PATH TO BECOMING AN ADVOCATE.
