

Financial Services Customer Lifecycle Mapping Sample

A one-page template for mapping marketing automation across customer lifecycle stages.

Lifecycle Stages

<div>Awareness<ul style="list-style-type: none">Digital AdsSocial Media CampaignsEducational ContentSEO/SEM</div>
<div>Consideration<ul style="list-style-type: none">Email NurturingComparison GuidesWebinars & EventsPersonalized Offers</div>
<div>Acquisition<ul style="list-style-type: none">Online ApplicationsOnboarding EmailsWelcome Kits</div>
<div>Retention<ul style="list-style-type: none">Account UpdatesLoyalty ProgramsCross-Sell CampaignsEducational Webinars</div>
<div>Advocacy<ul style="list-style-type: none">Referral ProgramsCustomer SurveysTestimonialsEvents & Communities</div>

Sample Marketing Automation Actions

Stage	Automated Action	Sample Tool
Awareness	Automated social ad campaigns targeting lookalike audiences	Meta Ads Manager
Consideration	Dynamic email sequences based on website activity	HubSpot
Acquisition	Instant confirmation email after online application	Salesforce
Retention	Monthly account summary & personalized recommendations	Mailchimp
Advocacy	Automated referral invitation to loyal customers	ReferralCandy