

Financial Services Customer Lifecycle Mapping Sample

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

Lifecycle Stages

Awareness

- Digital Ads
- Social Media Campaigns
- Educational Content
- SEO/SEM

Consideration

- Email Nurturing
- Comparison Guides
- Webinars & Events
- Personalized Offers

Acquisition

- Online Applications
- Onboarding Emails
- Welcome Kits

Retention

- Account Updates
- Loyalty Programs
- Cross-Sell Campaigns
- Educational Webinars

Advocacy

- Referral Programs
- Customer Surveys
- Testimonials
- Events & Communities

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