

The CRM Campaign Framework.

Seven customer campaigns that turn a quiet contact list into a system that sells, serves, and retains on its own. The framework is fixed. What goes inside it is your business. This is the same structure we install for the companies we work with, generalised so you can use it.

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Your database is the asset

Most businesses spend hard money getting a lead, then let it go cold in an inbox, a spreadsheet, or a shoebox of business cards. The list you already have is worth more than the next ad campaign. It just needs a system running behind it.

A CRM automation database is that system. It holds every contact and every interaction in one place, then works your list for you: welcoming new people, staying in touch, chasing the renewal, winning back the ones who drifted away. The same messages, sent the same way, to everyone, every time, without you remembering to do it.

This playbook sets out the seven campaigns that do the heavy lifting. They are the campaigns we build for the businesses we work with, and they apply whether you sell a product, a service, a subscription, or a lease. AI augments this. It does not replace it. The framework is the engine, and it has worked since long before anyone said the word automation.

The point in one line. You do not need another tool. You need your list, in one place, running these seven campaigns on its own.

How to read this framework

This is a framework, not a script. The shape stays the same across almost every business. What changes is what you put inside it, and that is where your difference lives.

The framework is timeless, the content is the difference

Welcome, nurture, onboarding, staying top of mind, renewal, and referral are universal. The principles held true when we ran them on paper and a fax machine. Your unique selling points, your ideal customer, and your offers are what make them yours. Get those down and the rest is assembly.

Start with email, then add channels

Email first, because it is quick to build and running by launch. Once a sequence proves out, the same message can become an SMS, a voice call, or a short video. The structure does not change, the format grows with you.

Be realistic, then refine

You will not have all seven campaigns perfect on day one, and that is fine. Build the structure, get it live, then sharpen it with real results over the following months. A working system beats a perfect plan that never ships.

Prospect, customer, past customer

Most campaigns speak to more than one audience. The content stays broadly the same. The call to action is what changes.

SEGMENT	WHO THEY ARE	TYPICAL CALL TO ACTION
Prospect	Enquired or shown interest, not yet bought	Book a call, get a quote, start a trial
Customer	Currently buying or subscribed	Upgrade, add-on, refer a friend, leave a review
Past customer	Bought before, now lapsed	Come back, returning-customer offer

In your CRM these are simply tags. A contact moves between segments automatically as their status changes, so the right campaign reaches the right person without anyone sorting a list by hand.

Running more than one location? Split each campaign into two lanes. A local, personal lane that builds the relationship (sent as the owner or the branch), and a central lane for anything that changes often (offers, seasonal campaigns, competitions). Build it once, roll it out everywhere, keep it personal.

The campaigns

Seven core campaigns cover almost every business, with offboarding as a situational eighth where customers can cancel or leave. Each sets out its job, who it is for, the sequence of messages, and what you need to prepare. Timings are a sensible starting point and easy to change once you test.

1 Welcome

Window: first 7 days **Trigger:** new contact or first purchase **Audience:** prospect and customer

The start of the relationship. The moment someone comes in, they are welcomed and given a clear, warm sense of who you are, what you stand for, and why you are different. It sets the foundation, whether they are a prospect weighing you up or a new customer settling in.

DAY	MESSAGE	CALL TO ACTION
0	Welcome and a friendly hello, what to expect from you	Reply with a question
1	Who you are and what makes you different, your unique selling points	See how it works
3	The value you deliver, shown through a real use case	See what fits me
5	Proof: a customer story or result	Read the story
7	A clear next step, then hand across to nurture	Book or buy

Prepare: your unique selling points in plain words, a short product or service overview, and one or two customer stories.

2 Nurture

Window: ongoing **Trigger:** welcome complete, or no purchase yet **Audience:** prospect and customer

Looking after people and staying top of mind, so you are the name they think of when the need arises. Run prospects and customers together to start, so you can test cleanly. The content stays broadly the same. The call to action shifts by segment.

SHAPE

- An evergreen value email every two to four weeks, drawn from a shared content bank
- One workflow, with the call to action swapping automatically on the segment tag
- Paused while a contact is in another active campaign, so nobody is over-mailed

Prepare: a starting bank of helpful topics, your offers and add-ons, and the link you want people to act on.

3 Onboarding

Window: first 30 days **Trigger:** purchase or sign-up **Audience:** new customers

The first thirty days after someone buys. This is where you reduce confusion and support calls and set the tone for the whole relationship: how to get started, how to get the most from it, who to contact, and the practical terms they need settled early.

DAY	MESSAGE	PURPOSE
0	You are in: a clear first-step checklist	Confident start
3	Getting the most from it, early tips	Early value
7	Who to contact for what, and how	Reduce support load
14	The terms in plain English: billing, changes, cancellation	Set expectations
30	Thirty-day check-in: a one-click satisfaction pulse and a review request	Measure and open referral

Prepare: a getting-started guide, your support hours and contacts, and your terms, cancellation, and refund wording.

4 Stay top of mind

Cadence: every quarter, one flagship annual event **Audience:** customers, and others where it fits

A regular touch that keeps you top of mind and builds a real sense of community, so repeat business and referrals feel natural rather than sold. Think of the Michelin guide: Michelin wanted to sell more tyres, so instead of saying "buy tyres" they published a guide that got people driving further, which wore out more tyres. Give genuine value, and the business follows.

IDEAS THAT WORK

- A signature annual event customers come to expect, the way people wait for a yearly competition
- A user-content competition, where entering grants you permission to use their photo or story publicly, so you build a content library as you go
- A short survey with a reward, which also feeds you insight
- A genuinely useful seasonal guide that keeps you present without a hard sell

Prepare: a quarterly calendar, a prize or reward budget, and the consent wording for using customer content.

5 Renewal or repeat

Window: 90, 60 and 30 days before the moment **Audience:** customers approaching a renewal or a likely repeat

The point where you work to keep the customer: a renewal, a re-order, or the next purchase. Three touches leading up to it. Whatever the incentive, it has to feel like you are genuinely giving something, not handing over a token.

TIMING	MESSAGE	INTENT
90 days	An early, warm heads-up and thank-you, and a question about how you can improve	Relationship first
60 days	The offer, framed as a reward for loyalty: a locked-in rate, an upgrade, or an extra	Give something real
30 days	Make it easy: one click, a personal note, a clear deadline	Remove friction

Prepare: your renewal or repeat incentives and their margins, and a one-click way to say yes.

6 Reactivation

Cadence: rolling 90, 180, 270 and 360 days **Audience:** past customers and dormant leads

Winning back the people who went quiet, on a rolling basis, so a lapsed customer is never simply forgotten. This is the cheapest revenue you have, because these people already know you. Much of it can ride alongside your top-of-mind campaign, so it never feels like a cold chase.

SINCE LAPSE	MESSAGE
90 days	A warm "we are still here", what is new, and how easy it is to come back
180 days	A timely reason to return, tied to a season or a need
270 days	A returning-customer incentive
360 days	An anniversary touch and your best offer

Prepare: how and when a customer counts as lapsed, and a returning-customer offer.

7 Referral

Window: ongoing **Audience:** happy customers

Your happy customers are your best source of new business. People ask their friends what they use and who they went through. A referral system turns that conversation into leads, and it is worth rewarding both sides.

HOW IT WORKS

- Enrol customers automatically after a positive thirty-day check-in, each with a personal referral link
- Reward both sides: the referrer earns credit or an entry into a draw, the friend gets a first-time offer
- Make sharing easy across your nurture and top-of-mind campaigns
- Track it in your CRM, so attribution and rewards run themselves, and referred friends drop straight into the welcome campaign

Prepare: your two-sided reward and the margins behind it, and the referral terms.

8

Offboarding (situational)**Window:** at cancellation or non-renewal **Trigger:** a cancel request, or a subscription or contract ending**Audience:** departing customers

Not every business has a formal exit, but where customers can cancel or choose not to renew, how you say goodbye matters. Done well, offboarding captures why they left, makes one sensible attempt to keep them where that fits, and leaves them feeling good enough to come back or refer. A good goodbye is a future hello.

STEP	MESSAGE	PURPOSE
On exit	Acknowledge it, no guilt, and ask one question: why are you leaving	Capture the reason
Same step	Where it fits, one offer matched to that reason (see below). Where it does not, skip it	Save where sensible
Confirm	Confirm clearly: what happens next, any final billing, and a genuine thank-you	A clean, fair exit
+14 days	The door is open, an easy way back, then hand across to reactivation on a slower clock	Leave as an advocate

MATCH THE OFFER TO THE REASON

THEY SAY	YOU OFFER
Too expensive	A smaller plan, or a short discount
Not using it	A pause, or help getting value from it
Missing something	A workaround, or what is coming next
Only needed it a while	A pause, and an easy return later
Circumstances changed	No offer, just thanks and an open door

Prepare: your cancellation process, the save offers you are willing to make and their margins, and the cases where an offer is not appropriate.

How it runs in your CRM

Behind the seven campaigns sits a small amount of plumbing. Set it up once and the whole thing runs on its own.

Tags for the lifecycle

Every contact carries tags: their segment (prospect, customer, past customer), which campaigns they are in, where they came from, and a suppression flag so nobody is ever mailed by two campaigns at once. Tags are what move a person from one campaign to the next automatically.

A few fields do the timing

FIELD	DRIVES
First name and source	Personalisation and reporting
Purchase or start date	Onboarding timing
Renewal or repeat date	The 90, 60 and 30-day touches
Lapse date	The rolling reactivation clock
Satisfaction score	Referral enrolment and follow-up

One workflow per campaign

Each campaign is a single workflow with a trigger and a set of steps. A small routing workflow assigns the lifecycle tags and enforces the suppression rule, so campaigns never collide. Your CRM handles the referral rewards and the reporting, and it connects to your other data through simple links when you need it to.

This is automation, not magic. Nothing here needs a data scientist. It needs your list in one place, these campaigns switched on, and someone to sharpen the words over time. That is what a CRM automation database is for.

Where to start

Do not try to build all seven at once. Pick the campaign that fixes your biggest leak, get it running, then add the next.

IF YOUR PROBLEM IS	START WITH
Leads go cold	Welcome, then Nurture
Customers churn early	Onboarding
Renewals slip	Renewal or repeat
A dead list	Reactivation
Not enough new business	Referral
Customers leave quietly	Offboarding

01

Welcome

First 7 days. Who you are, split for prospect and customer.

02

Nurture

Ongoing value. Same content, the call to action changes by segment.

03

Onboarding

First 30 days. Get started, terms, who to call, a check-in.

04

Stay top of mind

Quarterly value and community, with a signature annual event.

05

Renewal or repeat

90, 60 and 30 days out. An incentive that feels like a gift.

06

Reactivation

Rolling 90 to 360 days. Win back the ones who went quiet.

07

Referral

Two-sided reward. Turn happy customers into your best source.

08

Offboarding

Situational. Capture why they left, save where it fits, leave as an advocate.

+

The plumbing

Tags, a few dated fields, one workflow per campaign. Set once, runs itself.

Want this built for your business?

This is the framework. What goes inside it is yours, and getting it set up in a CRM is what we do. We install the database, the campaigns, and the automation, then hand you a system you run yourself. No consultants on retainer, no ten separate tools.

Start with your worst task. Book a free AI audit at anaboo.ai and we will show you the one campaign that will move the needle first.

anaboo.ai · The AI Operating System for your business · Version 1.0 · 2026. The framework is fixed, the content is what makes it yours.