RAPP
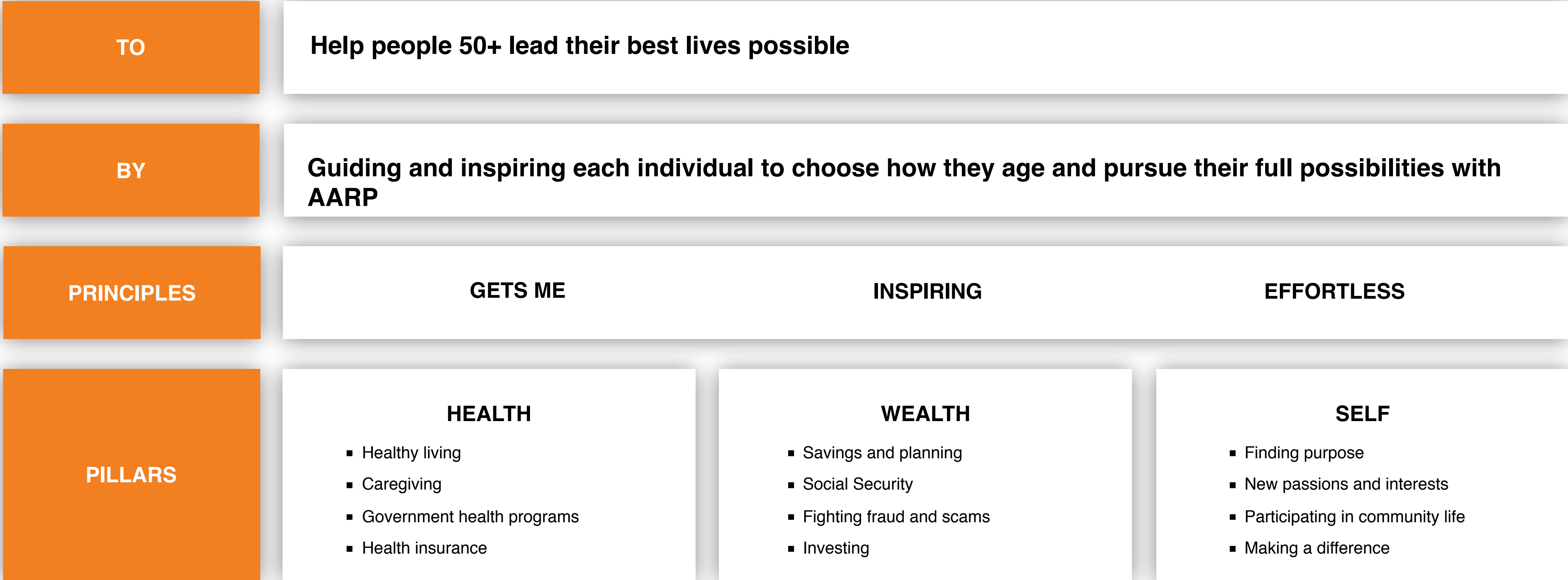
AARP DIGITAL FIRST YEAR

IDEAL NEW MEMBER EMAIL EXPERIENCE

April 21, 2018

A VISION FOR AARP, APPLIED TO EMAIL

TO	**Help people 50+ lead their best lives possible**
BY	**Guiding and inspiring each individual to choose how they age and pursue their full possibilities with AARP**

	GETS ME	INSPIRING	EFFORTLESS
PRINCIPLES			

	HEALTH	**WEALTH**	**SELF**
PILLARS	▪ Healthy living ▪ Caregiving ▪ Government health programs ▪ Health insurance	▪ Savings and planning ▪ Social Security ▪ Fighting fraud and scams ▪ Investing	▪ Finding purpose ▪ New passions and interests ▪ Participating in community life ▪ Making a difference

TAPPING THE POWER OF 1:1 COMMUNICATION

KNOW ME

50% of consumers are likely to switch brands if a company doesn't make an effort to personalize communications to them, or anticipate their needs.

Salesforce, 2016

KNOW WHAT I WANT

Smart personalization engines used to recognize customer intent will enable digital businesses to increase their profits by up to 15%.
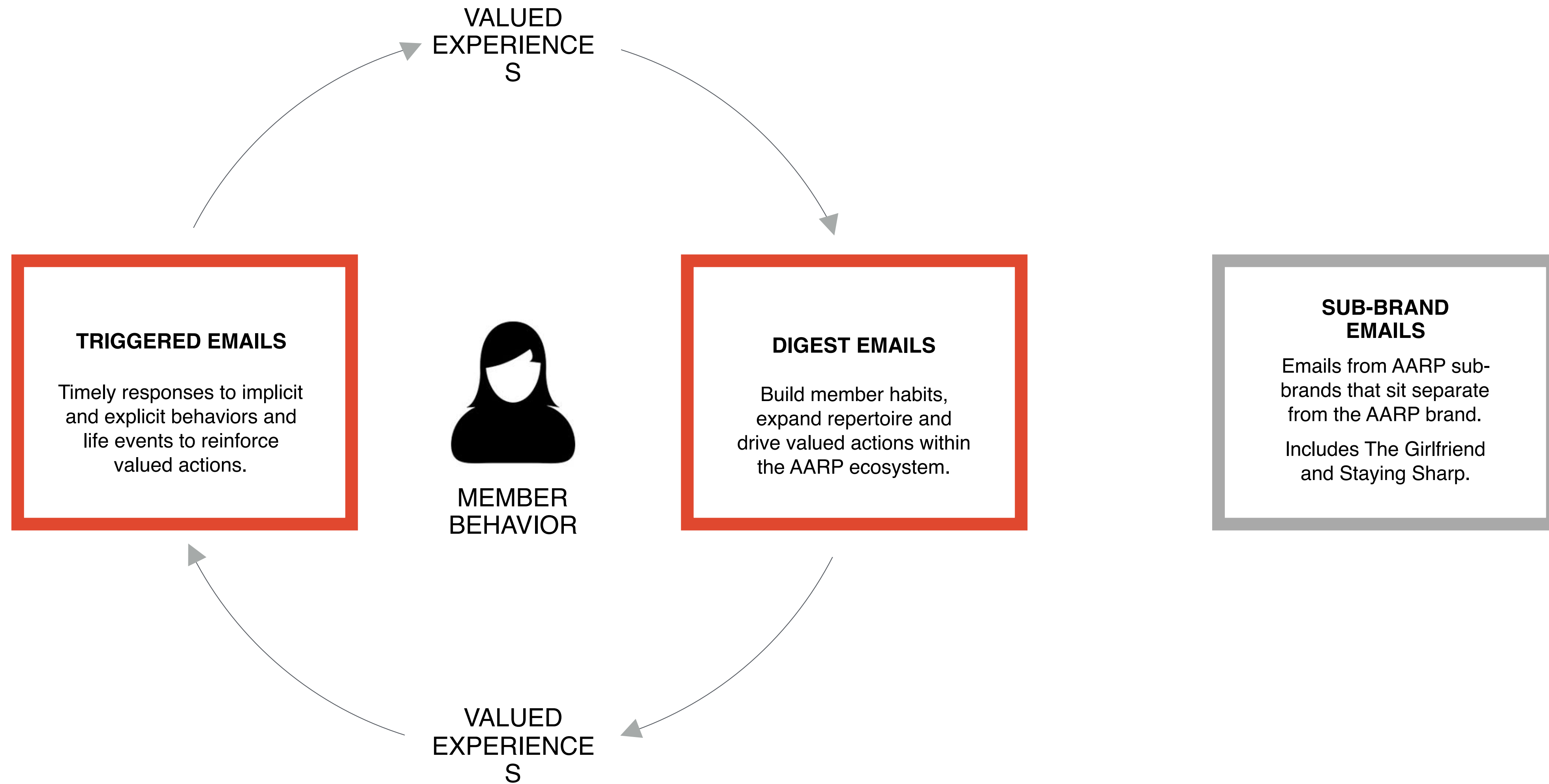
Gartner, 2016

KNOW WHEN AND WHERE I WANT IT

81% of consumers want brands to get to know them and understand when to approach them and when not to.
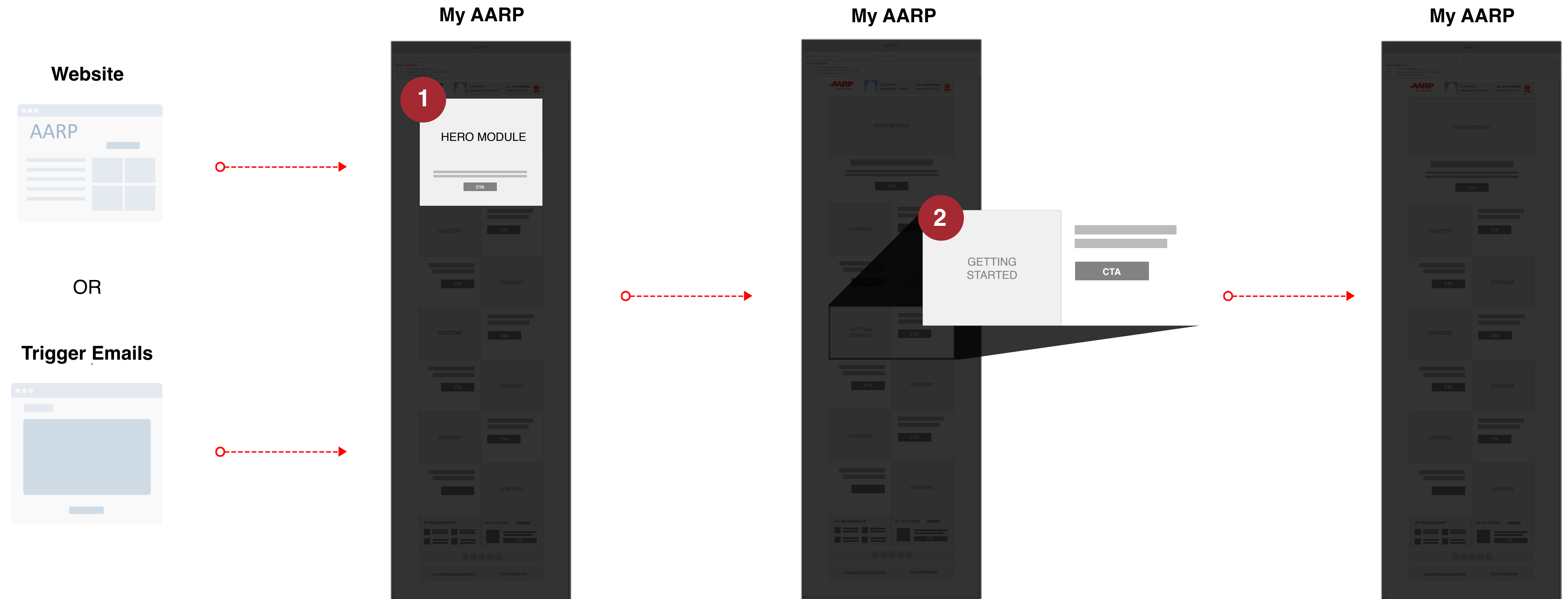
Accenture, 2017

TWO TYPES OF EMAILS IN ONE STREAM OF VALUED EXPERIENCES

VALUED EXPERIENCES

TRIGGERED EMAILS

Timely responses to implicit and explicit behaviors and life events to reinforce valued actions.

MEMBER BEHAVIOR

DIGEST EMAILS

Build member habits, expand repertoire and drive valued actions within the AARP ecosystem.

SUB-BRAND EMAILS

Emails from AARP sub-brands that sit separate from the AARP brand.

Includes The Girlfriend and Staying Sharp.

VALUED EXPERIENCES

EMAIL MODULE STRUCTURING

Website

AARP

OR

Trigger Emails

My AARP

1

HERO MODULE

CTA

My AARP

2

GETTING
STARTED

CTA

My AARP

Engagement with new content, outside of profile interests would influence the content served in their next My AARP email.

The subsequent My AARP email would serve that new content in the hero to confirm their interest.

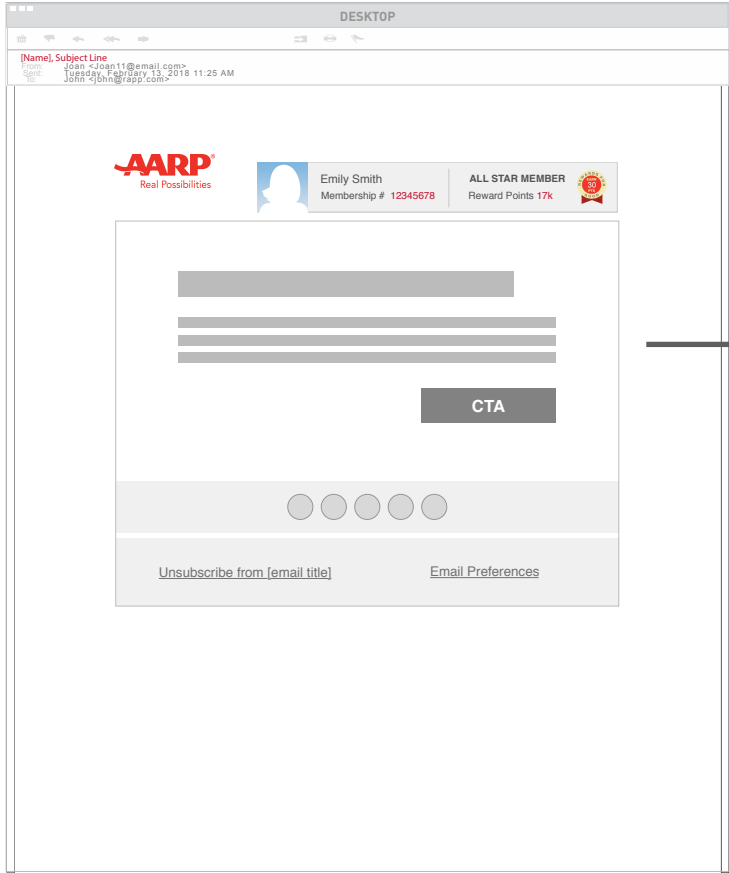If the new content is engaged with it will remain a regular part of their My AARP email..

If it remains unengaged with, it will be de-prioritized and placed in lower module.

If it remains unengaged with in lower module, it will be dropped from the My AARP email completely.

5

THREE EMAIL TEMPLATES

TEMPLATE 1

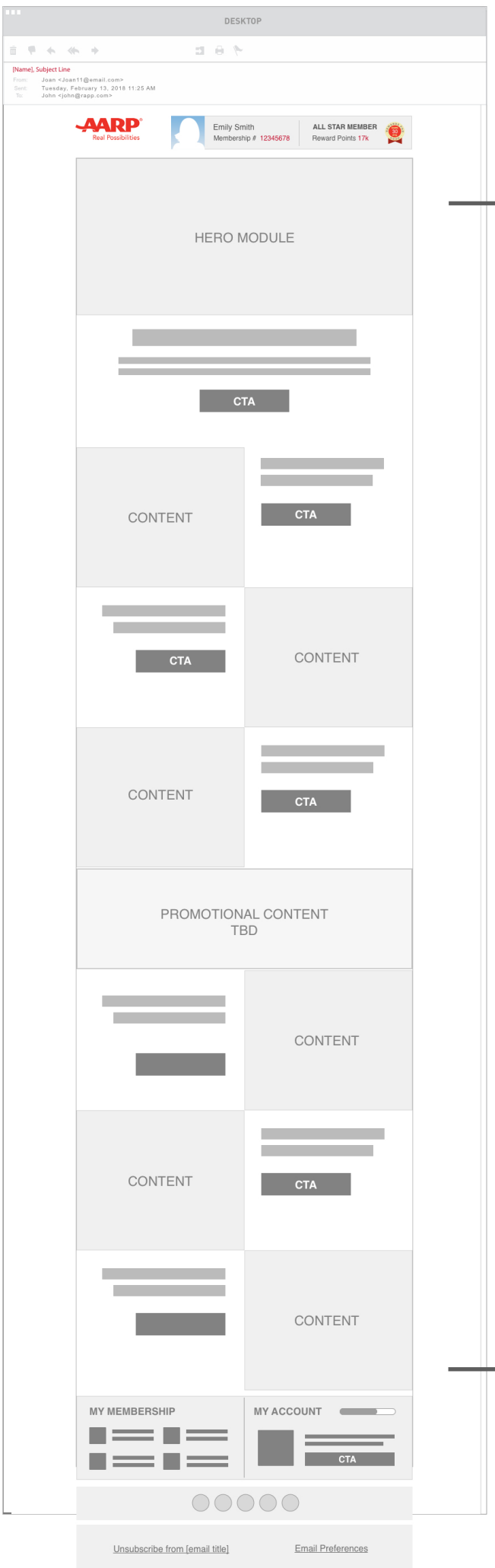Brief copy with single CTA. Good for transactional emails.

TEMPLATE 2

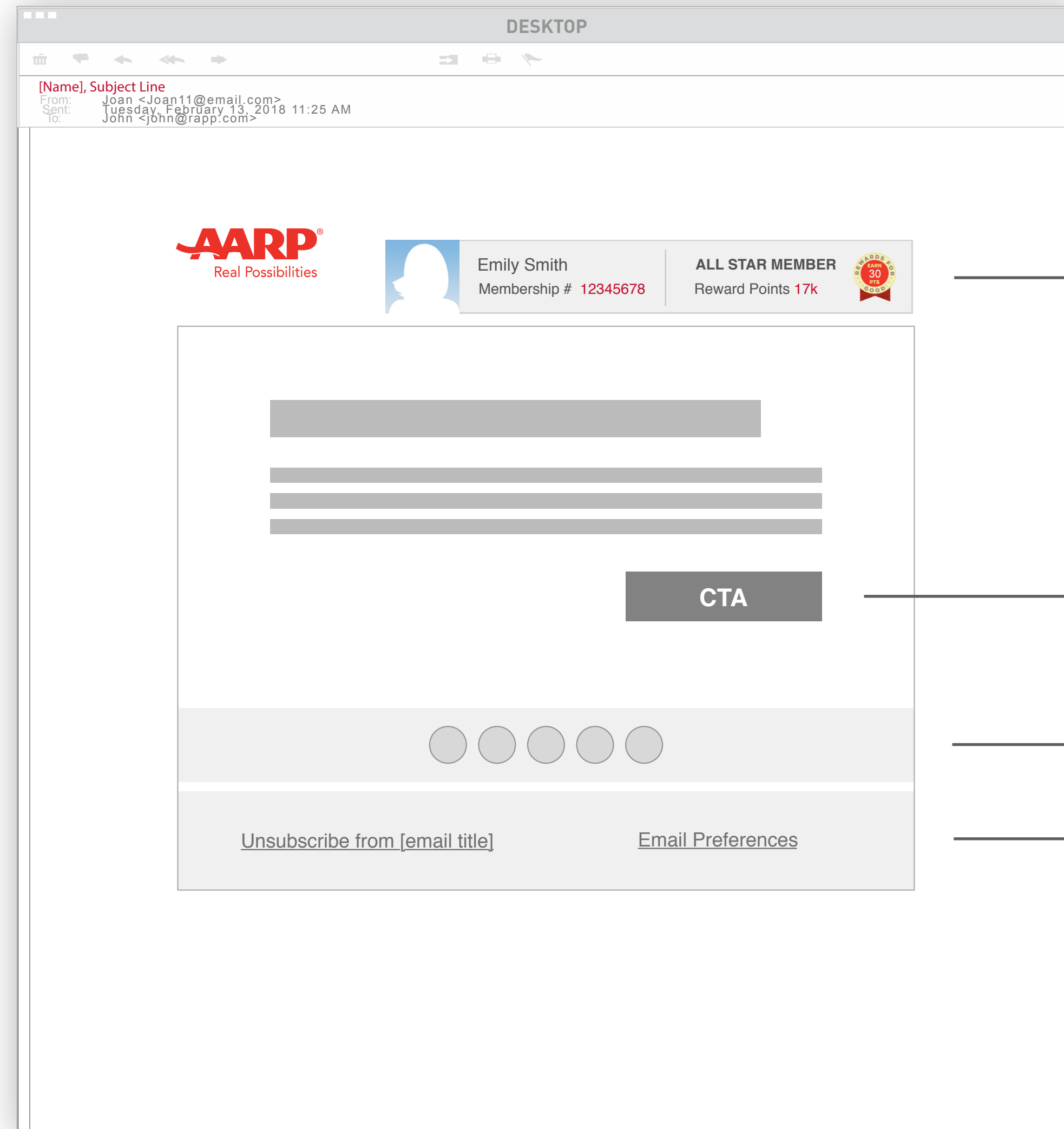Single content feature with single CTA. Good for announcement or content feature emails.

TEMPLATE 3

Multiple content areas with multiple CTAs. Good for newsletters and instructional emails.

CONFIRM OPT-IN TRIGGER

STAGE	JOIN
GOAL	Set expectations by outlining clear immediate next steps.
ROLE	Get new members to take the first step of confirming opt-in for email stream.
TIMING	Immediately after providing email through the join process.
CONTENT	- Thank them for joining - Explain COI importance - Outline immediate next steps
TONE	Grateful, friendly, to the point
CTA	Confirm opt-in
PROCESS	Links to a web confirmation
KPIs	Member acquisition rate

WIREFRAME

DESKTOP

[Name], Subject Line
From: Joan <Joan11@email.com>
Sent: Tuesday, February 13, 2018 11:25 AM
To: John <john@rapp.com>

AARP
Real Possibilities

Emily Smith
Membership # 12345678

ALL STAR MEMBER
Reward Points 17k

CTA

Unsubscribe from [email title]   Email Preferences

Standard profile header.

Feedback module
with one email CTA.

Standard social footer.

Standard opt-out and
email preference footer.

CONFIRM OPT-IN TRIGGER

STAGE	**JOIN**
GOAL	Set expectations by outlining clear immediate next steps.
ROLE	Get new members to take the first step of confirming opt-in for email stream.
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EXAMPLE
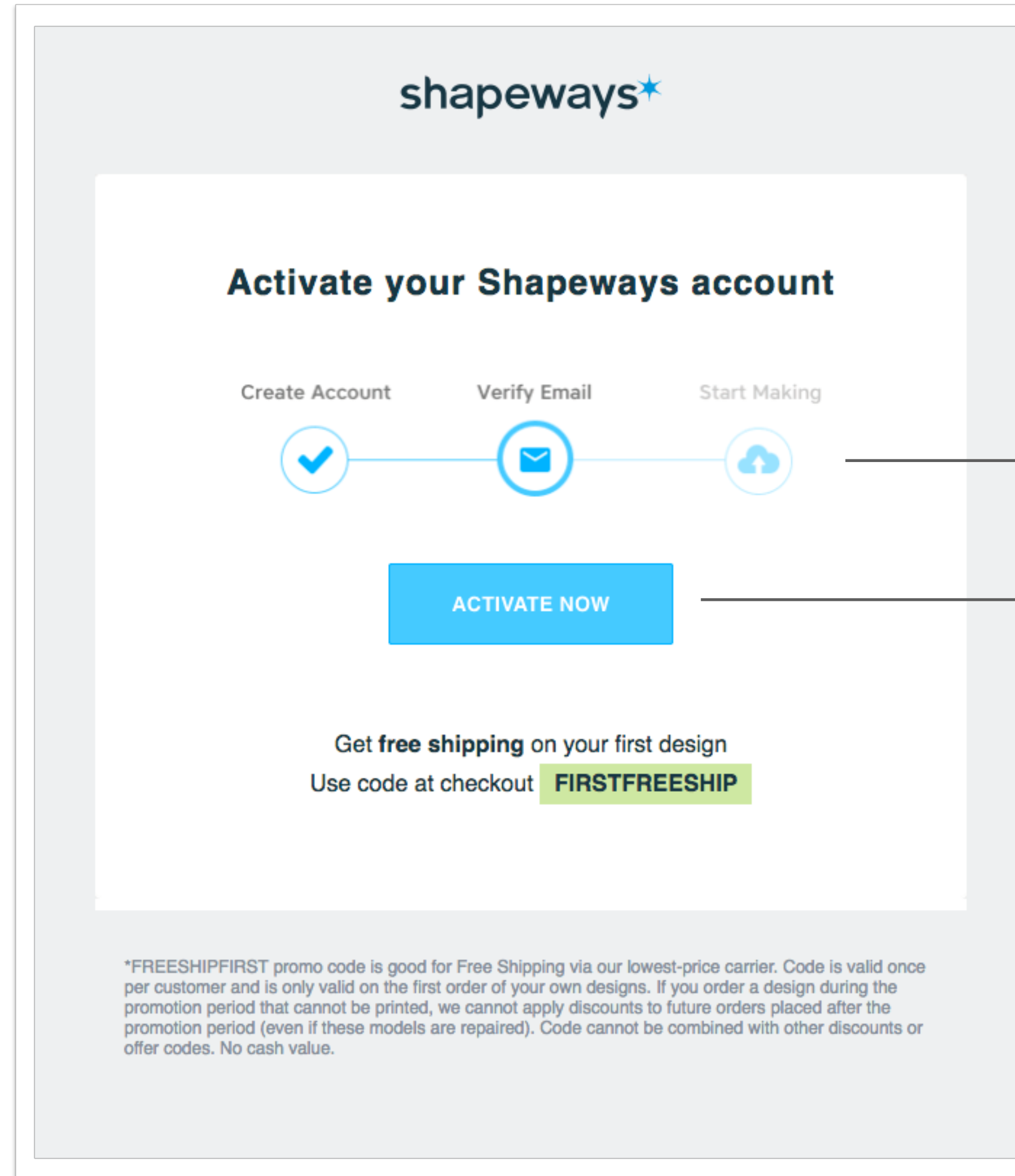
Concise directions with clear timeline iconography.

Large CTA button to drive immediate action.

WELCOME TRIGGER

STAGE	**WELCOME**
GOAL	Welcome and onboard them to membership, recognizing their preferences and interests.
ROLE	Direct them to key onboarding activities, primarily completing their profile.
TIMING	Sent after confirming email address via COI email.
CONTENT	- Welcome to the community - Membership info overview - Key onboarding activities (e.g. AARP Now, RFG, profile completion, etc.)
TONE	Full of possibility, excited for what's ahead
CTA	Complete your profile
PROCESS	Links to a profile page with an onboarding experience.
KPIs	Profile completion rate and app downloads

WIREFRAME
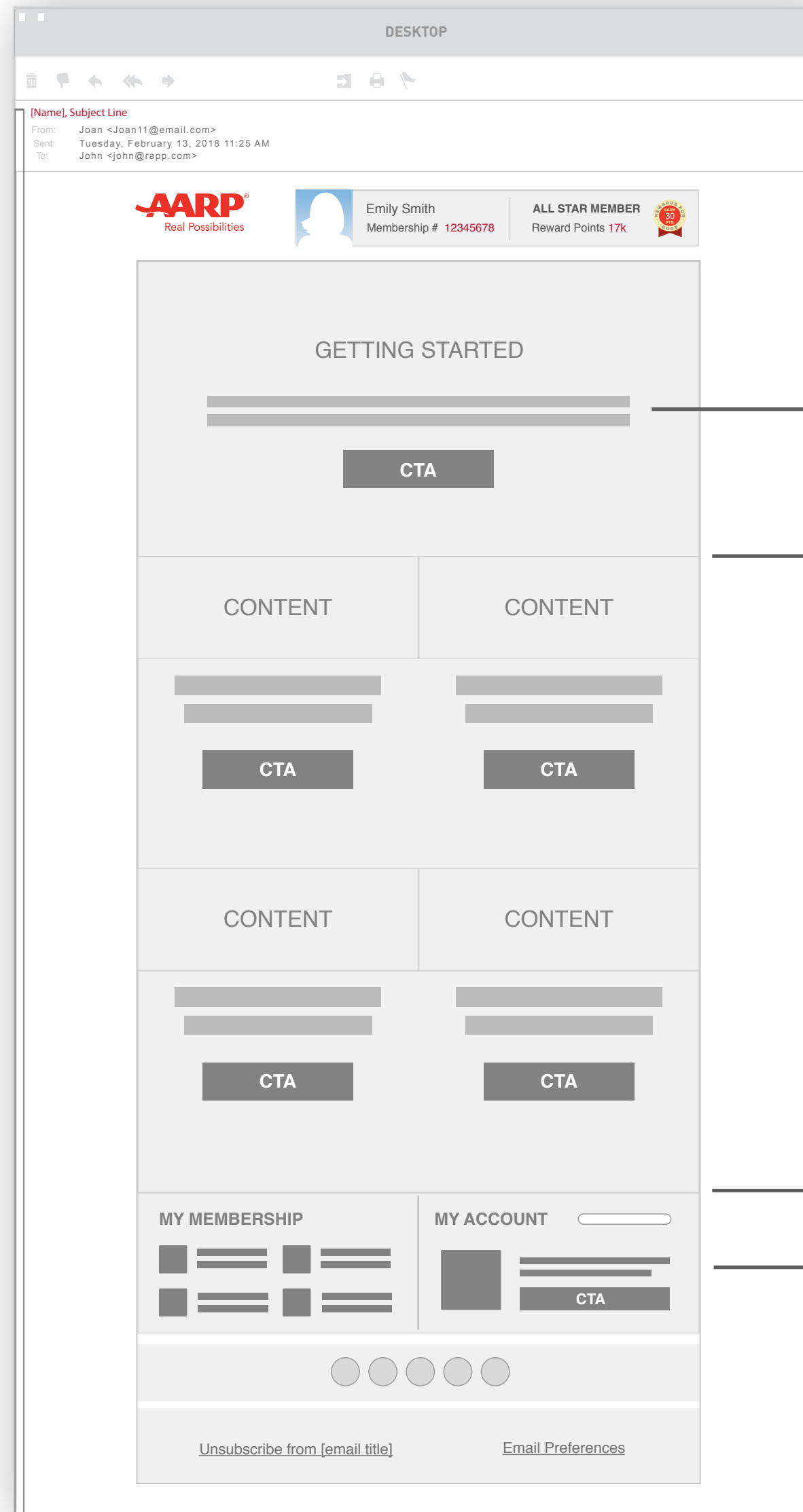
Feedback module with welcome message with primary CTA to "Complete Your Profile".

**Key onboarding activities and steps.**

Completed activities will not populate. Placement dependent on known interests (i.e. if user joined through discounts, discount onboarding will have priority)

Activity modules with membership info summary and recent benefits used.

9

WELCOME DIGEST

STAGE	**WELCOME**
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EXAMPLE
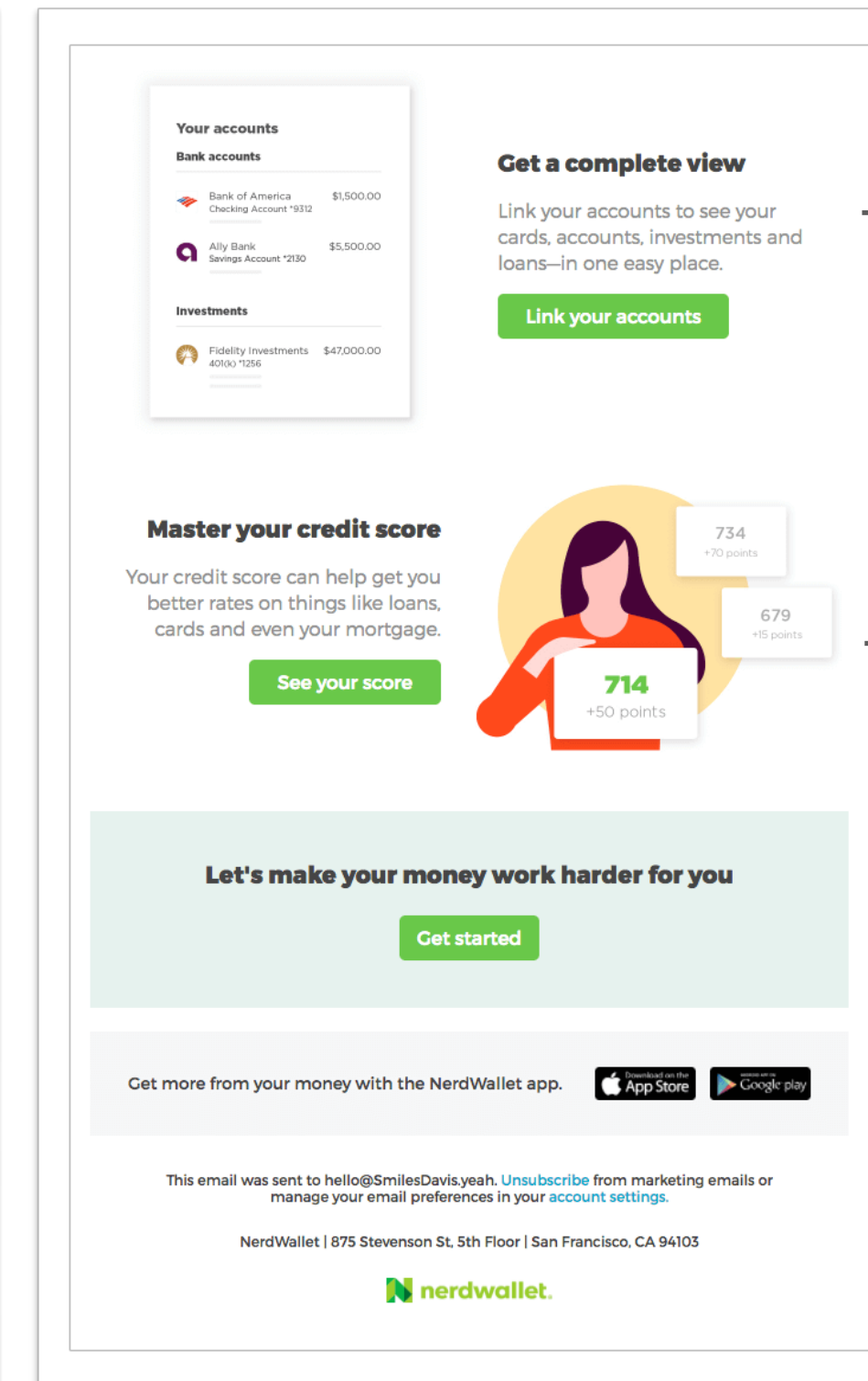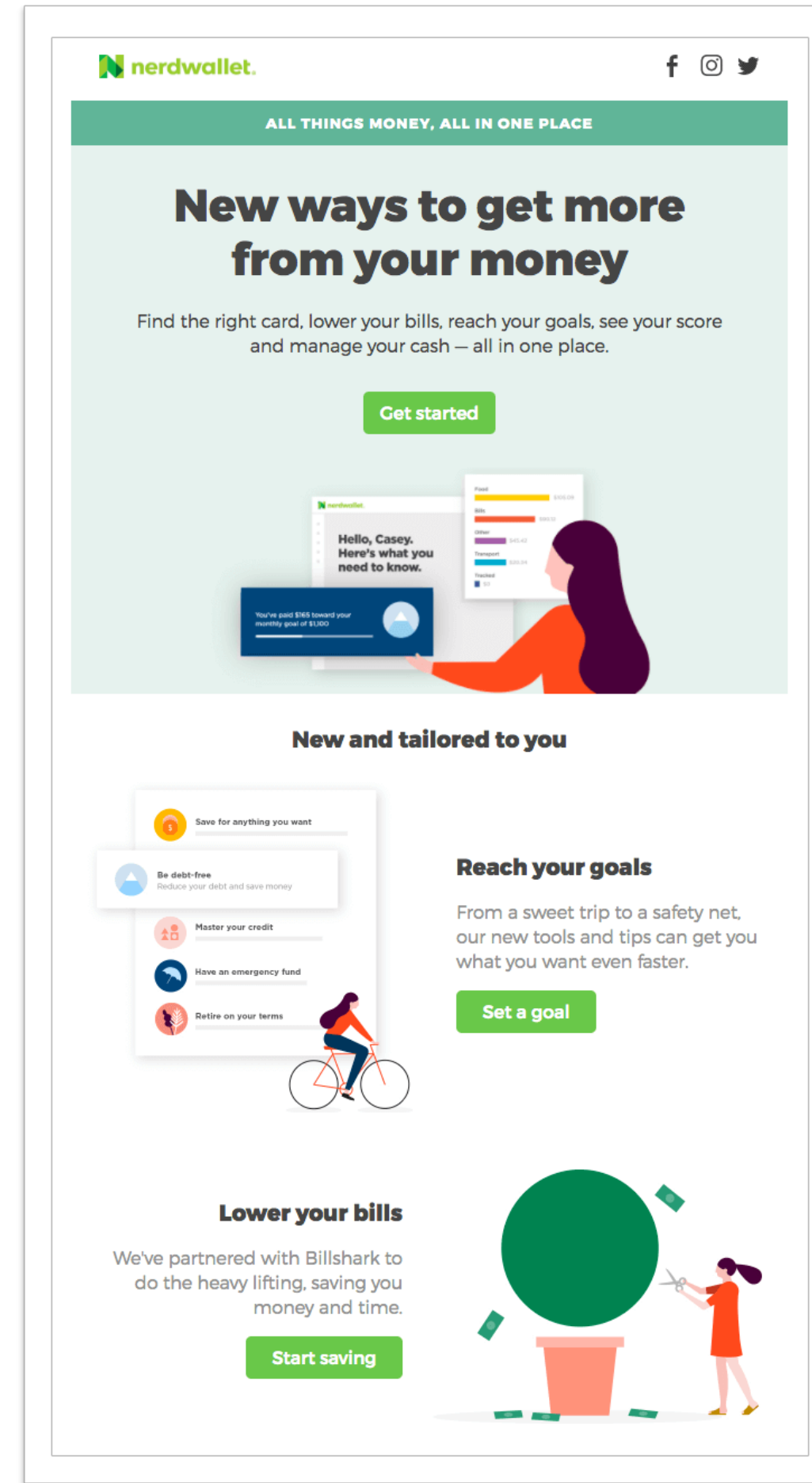
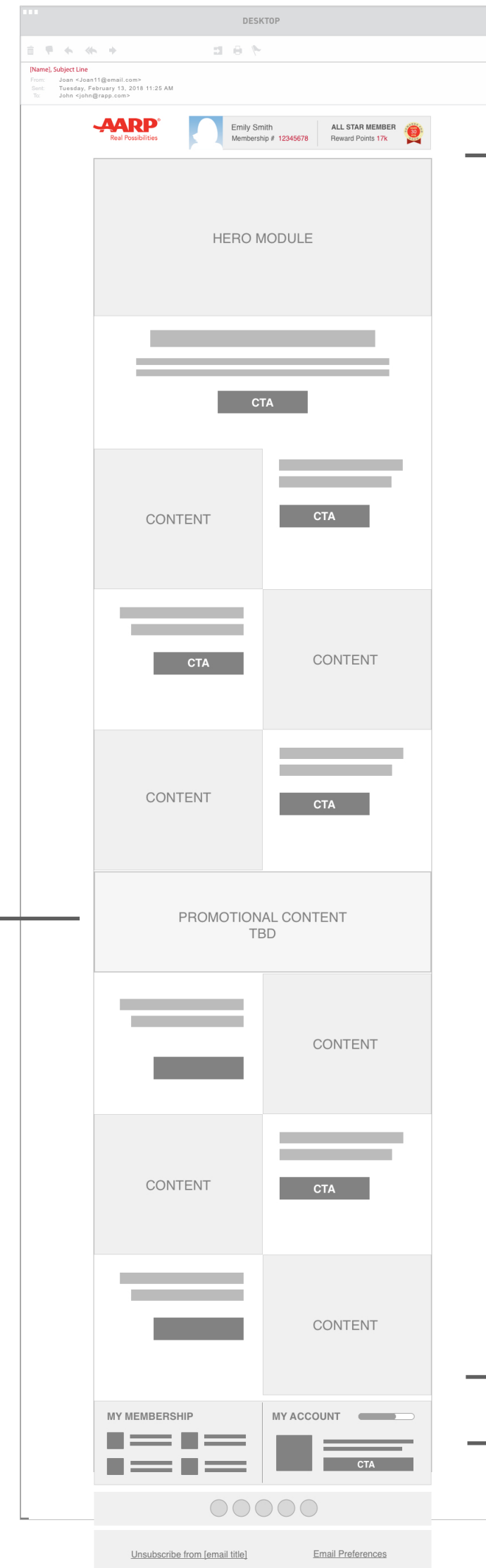Onboarding copy written as benefits to the user.

Infographic-style visuals add personality and make content easy to digest.

10

MY AARP DIGEST

STAGE	**ENGAGE**
GOAL	Help them increasingly discover and use AARP benefits and content they care about.
ROLE	Recommend content and benefits based off their profile and engagement behavior.
TIMING	Cadence (daily, weekly or monthly) to be determined by user. Default is weekly.
CONTENT	- Content and benefit recommendations - Overview of engagement activity - Membership action items
TONE	Friendly, encouraging
CTA	See more
PROCESS	Links to an AARP.org page with more personalized recommendations.
KPIs	Engagement index

Promotional module option to promote business priorities to a larger audience.

- **Content module** recommendations
- **Foundation/Advocacy module** recommendations
- **Community/Events module** recommendations
- **Benefits module** recommendations
- **Feedback module** with membership action items

Placement and prominence will be determined by implicit and explicit profile data.

Activity modules with membership info summary and recent benefits used.

11

MY AARP DIGEST

STAGE	**ENGAGE**
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TONE	Friendly, encouraging
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EXAMPLE

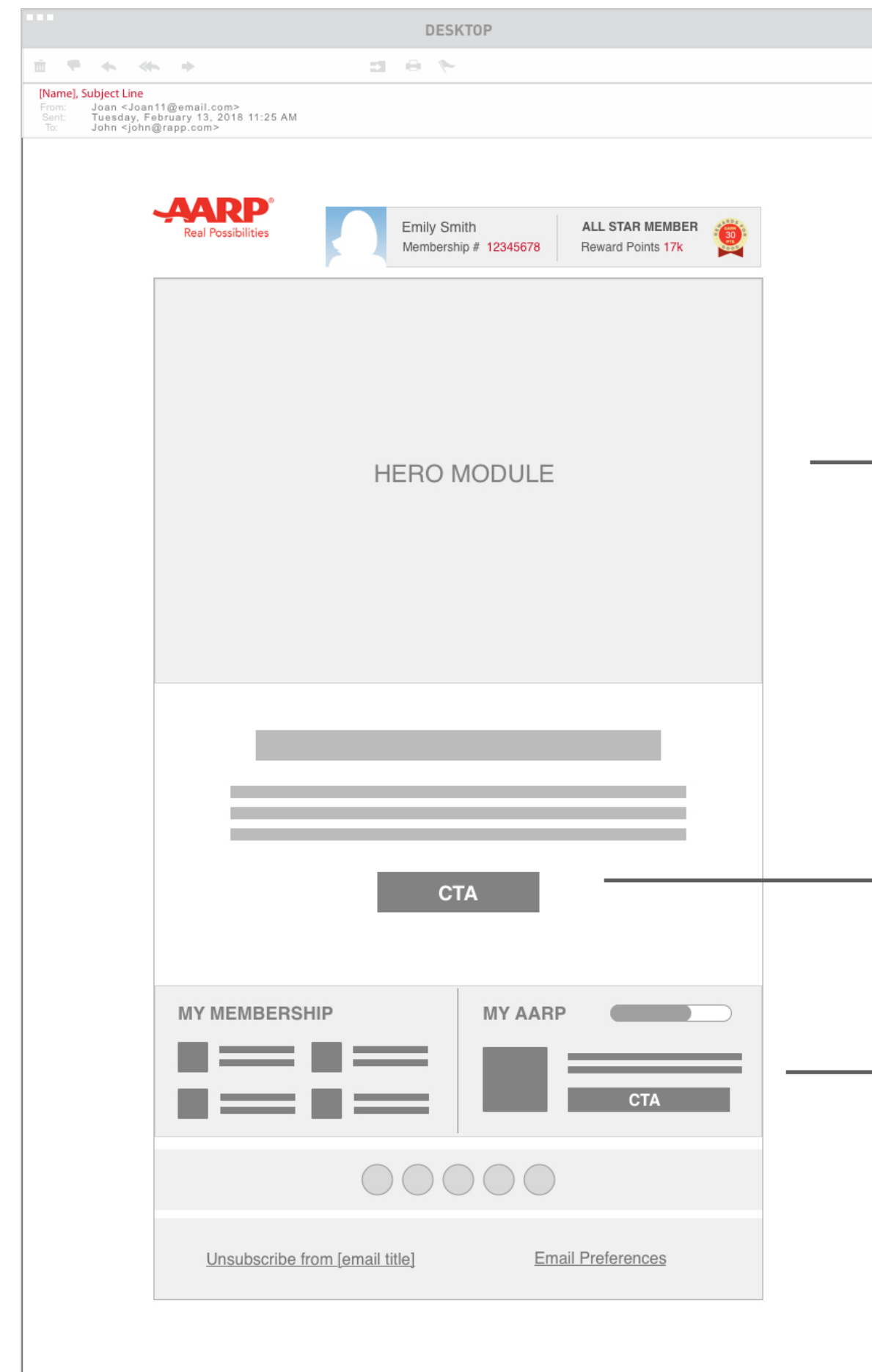Recommendations directly pertinent to user needs.

Variety of content areas that provided added value.

Business initiatives and offers are visually differentiated, but look native to the email.

LIFE EVENT TRIGGER

STAGE	**ENGAGE**
GOAL	Help them increasingly discover and use AARP benefits and content they care about.
ROLE	Recommend specific content based on a life change determined by strong signals.
TIMING	Sent immediately upon detecting a strong life change signal.
CONTENT	- Content and benefit recommendations - Email feedback to get specific direction on content recommendations
TONE	Understanding, helpful
CTA	Dependent on the trigger content
PROCESS	Links to an AARP.org page with more content of the same topic area.
KPIs	Engagement index

WIREFRAME

Large hero module to draw focus on life stage content.

Feedback module with primary CTA to confirm life change trigger relevance.

Activity modules with membership info summary and recent benefits used.

13

LIFE EVENT TRIGGER

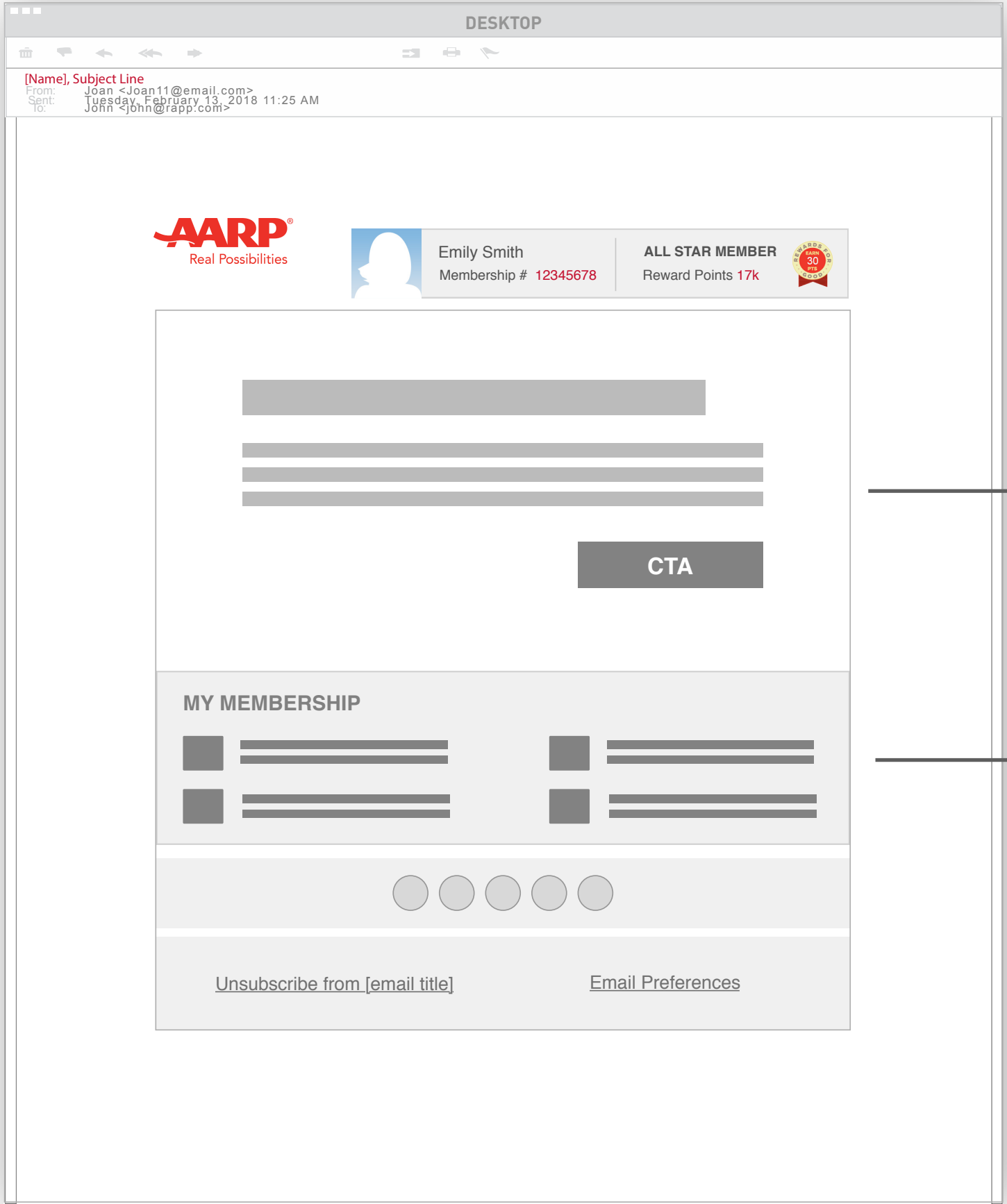|	
STAGE	**ENGAGE**
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TONE	Understanding, helpful
CTA	Dependent on the trigger content
PROCESS	Links to an AARP.org page with more content of the same topic area.
KPIs	Engagement index

EXAMPLE

Warm and understanding copy makes user feel understood and supported.

One CTA for a key activity.

14

RE-ENGAGEMENT TRIGGER

STAGE	**ENGAGE**
GOAL	Help them increasingly discover and use AARP benefits and content they care about.
ROLE	Re-engage them by getting them to update their profile for more relevant content.
TIMING	Sent upon detecting a period of inactivity.
CONTENT	- Encouragement to update profile - Overview of AARP topic areas - Content and benefit recommendations
TONE	Friendly, encouraging
CTA	Update your profile
PROCESS	Links to profile page.
KPIs	Engagement index

WIREFRAME

DESKTOP

[Name], Subject Line
From: Joan <Joan11@email.com>
Sent: Tuesday, February 13, 2018 11:25 AM
To: John <john@rapp.com>

Emily Smith
Membership # 12345678

ALL STAR MEMBER
Reward Points 17k

CTA

MY MEMBERSHIP

Unsubscribe from [email title]   Email Preferences

Feedback module
with CTA to update
profile.

- **Content module** recommendations
- **Foundation/Advocacy module** recommendations
- **Community/Events module** recommendations
- **Benefits module** recommendations

Module type and recommendations dependent on
implicit and explicit profile data.

15

RE-ENGAGEMENT TRIGGER

STAGE	**ENGAGE**
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TIMING	Sent upon detecting a period of inactivity.
CONTENT	- Encouragement to update profile - Overview of AARP topic areas - Content and benefit recommendations
TONE	Friendly, encouraging
CTA	Update your profile
PROCESS	Links to profile page.
KPIs	Engagement index

EXAMPLE

Overview of the email streams the user is receiving.

Personalized recommendations to reinforce the value the brand brings.

16

RE-DIRECTION TRIGGER

STAGE	**ENGAGE**
GOAL	Help them increasingly discover and use AARP benefits and content they care about.
ROLE	Help opt out of email and opt into preferred communication channels.
TIMING	Sent upon detecting a prolonged period of inactivity.
CONTENT	- Provide option to opt-out - Suggest other communication streams to opt into or follow
TONE	Understanding, helpful
CTA	Stay opt-ed in
PROCESS	Links to profile page.
KPIs	Engagement index

WIREFRAME

Feedback module with one CTA to stay opted in.

Offer social as other AARP communication options.

RE-DIRECTION TRIGGER

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TIMING	Sent upon detecting a prolonged period of inactivity.
CONTENT	- Provide option to opt-out - Suggest other communication streams to opt into or follow
TONE	Understanding, helpful
CTA	Stay opt-ed in
PROCESS	Links to profile page.
KPIs	Engagement index

EXAMPLE

Opt-out copy written as a way to advertise the benefits of following on Facebook.

RECOMMENDATION TRIGGER

STAGE	**SHARE**
GOAL	Make sharing benefits and positive experiences with others easy.
ROLE	Help them effortlessly share content and benefits that they have found valuable.
TIMING	Sent upon frequent or significant use of a content or benefit.
CONTENT	- Offer rewards to encourage sharing - Solicit feedback on content or benefit if they don't want to share
TONE	Supportive, empowering
CTA	Share with a friend
PROCESS	Links to a referral page.
KPIs	Advocacy rate

WIREFRAME
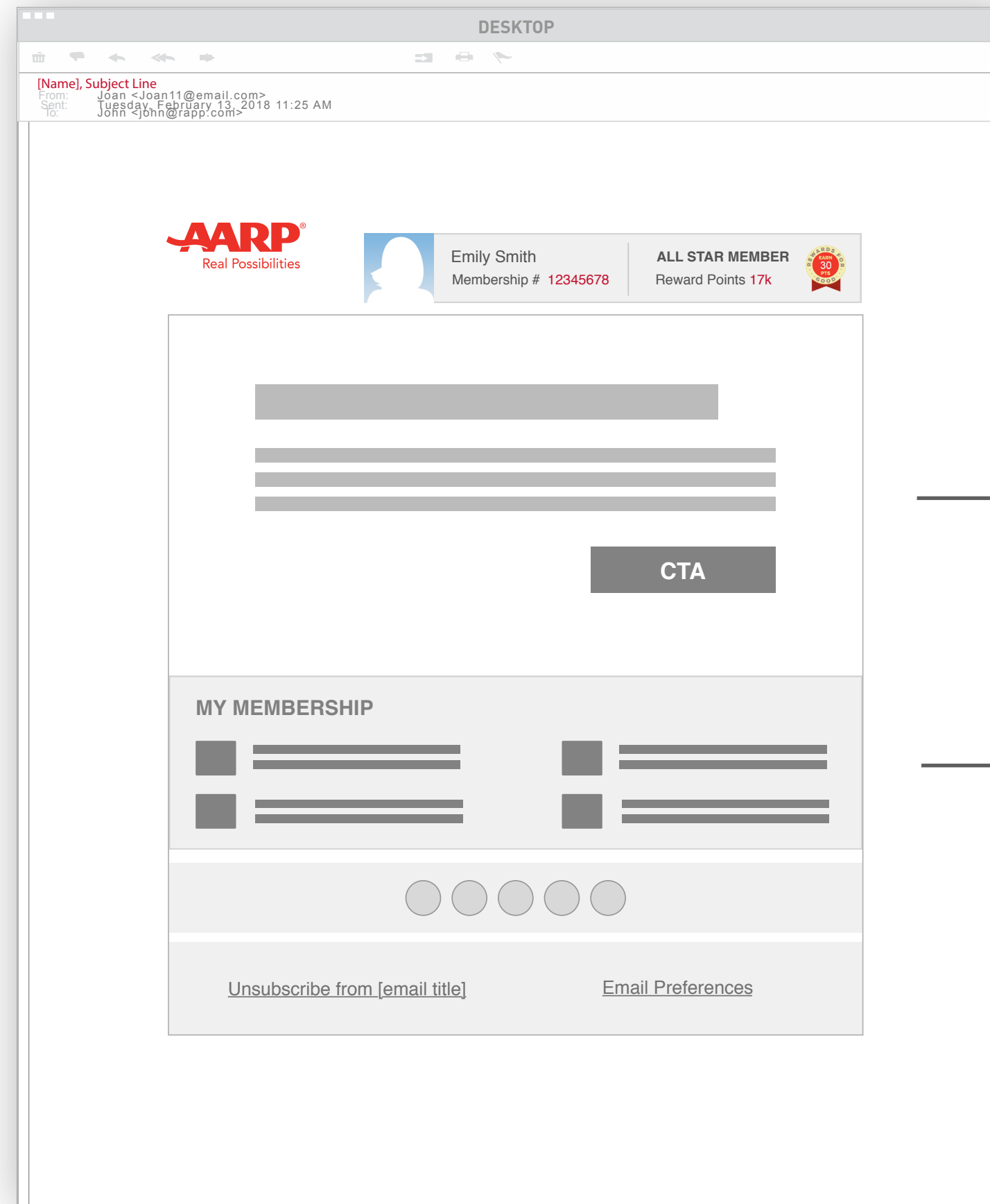
Feedback module with one CTA inviting user to share with friends after actions like:
- Redemption of benefits
- Donation to the Foundation
- Usage of AARP programs

Activity module with recent activities or benefits redeemed.

RECOMMENDATION TRIGGER

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PROCESS	Links to a referral page.
KPIs	Advocacy rate

EXAMPLE
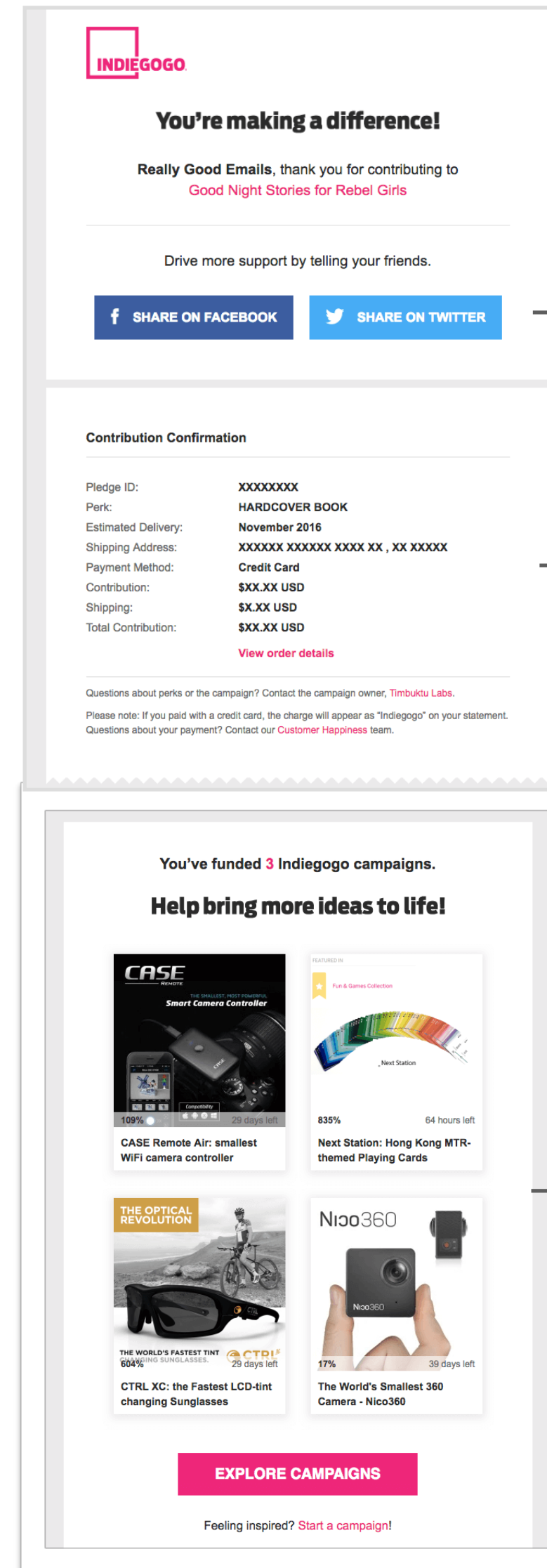
Provides several easy ways to immediately share with friends.

Provides confirmation details of activity.

Recommends other ways to keep engaging.

MEMBERSHIP ANNIVERSARY TRIGGER

STAGE	**REINFORCE**
GOAL	Reinforce that AARP made a difference in their life.
ROLE	Show all the tangible ways they benefitted by being an AARP member.
TIMING	At the end of every membership anniversary.
CONTENT	- Summary of membership activity (e.g. benefits redeemed, money saved, articles read, RFG points earned, etc.)
TONE	Celebratory, grateful
CTA	Explore more possibilities
PROCESS	Links to an AARP.org page with more personalized recommendations.
KPIs	NPS customer survey

WIREFRAME

Feedback module encouraging renewal if membership is almost up.

Activity module summary of membership activity and encouragement to keep exploring.

Activity module membership updates.

MEMBERSHIP ANNIVERSARY TRIGGER

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CTA	Explore more possibilities
PROCESS	Links to an AARP.org page with more personalized recommendations.
KPIs	NPS customer survey

EXAMPLE

Activity summary copy written to show tangible and emotional value.

Copy written to encourage and add excitement for another year with the brand.

22

RENEWAL REMINDER TRIGGER

STAGE	**REINFORCE**
GOAL	Reinforce that AARP made a difference in their life.
ROLE	Remind them that renewal is coming up, along with more exciting things from AARP.
TIMING	Sent a week before end of membership.
CONTENT	- Reminder that renewal is in a week - Sneak peek content or teasers
TONE	Excited, encouraging
CTA	See your membership details
PROCESS	Link to profile page.
KPIs	NPS customer survey

WIREFRAME

Feedback module with one CTA to visit their profile to review membership details.

- **Content module** teaser
- **Foundation/Advocacy module** teaser
- **Community/Events module** teaser
- **Benefits module** teaser

Module type and recommendations dependent on implicit and explicit profile data.

RENEWAL REMINDER TRIGGER

STAGE	**REINFORCE**
GOAL	Reinforce that AARP made a difference in their life.
ROLE	Remind them that renewal is coming up, along with more exciting things from AARP.
TIMING	Sent a week before end of membership.
CONTENT	- Reminder that renewal is in a week - Sneak peek content or teasers
TONE	Excited, encouraging
CTA	See your membership details
PROCESS	Link to profile page.
KPIs	NPS customer survey

EXAMPLE

SQUARESPACE

Your Squarespace Account Renews This Week

Hi Matthew Smith,

Thank you for choosing Squarespace for your website, http://debbie-dujardin.squarespace.com/.

As a friendly reminder, your account will be renewed for $96.00 on January 22, 2015. If you wish to keep your account with us, no action is required.

My entire team is dedicated to ensuring your Squarespace experience is first rate. If you have any questions, comments, or suggestions, please let me know. Simply reply to this email and I'll make sure you receive a prompt response.

Thank you again for choosing Squarespace.

Sincerely

Cory Taylor
Customer Care Manager
Squarespace

The Squarespace Team

Squarespace, Inc. 459 Broadway New York, NY, 10013, USA

Friendly copy informs users they can simply reply to the email to ask any renewal questions.

Addressed copy makes renewal feel less transactional and more personal.

RENEWAL THANK YOU TRIGGER

STAGE	**RENEW**
GOAL	Reinforce their decision to renew.
ROLE	Thank them and get them excited for another year with AARP.
TIMING	Sent immediately upon renewal.
CONTENT	- Thank them for renewing - Remind them to update their profile for the new year
TONE	Grateful, excited
CTA	Update your profile
PROCESS	Link to profile page.
KPIs	Customer retention

WIREFRAME

DESKTOP

[Name], Subject Line
From: Joan <Joan11@email.com>
Sent: Tuesday, February 13, 2018 11:25 AM
To: John <john@rapp.com>

AARP
Real Possibilities

Emily Smith
Membership # 12345678

ALL STAR MEMBER
Reward Points 17k

CTA

Unsubscribe from [email title]   Email Preferences
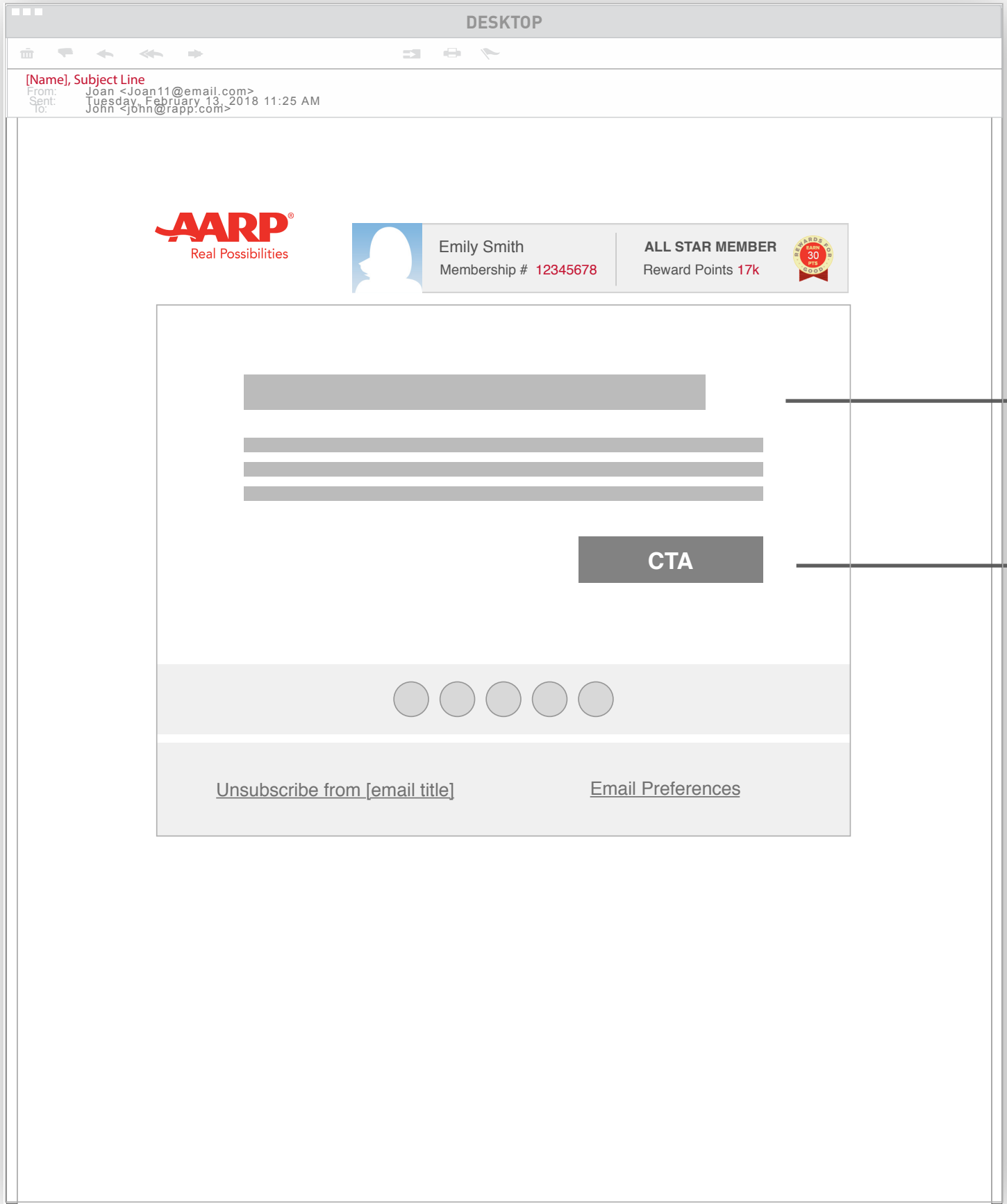
Copy should emphasize appreciation for renewal.

Action module with CTA to update profile for the new year.

25

RENEWAL THANK YOU TRIGGER

STAGE	**RENEW**
GOAL	Reinforce their decision to renew.
ROLE	Thank them and get them excited for another year with AARP.
TIMING	Sent immediately upon renewal.
CONTENT	- Thank them for renewing - Remind them to update their profile for the new year
TONE	Grateful, excited
CTA	Update your profile
PROCESS	Link to profile page.
KPIs	Customer retention

EXAMPLE

Thanks for your payment.   View online

verizon✓   Shop   Support   My Verizon

Your plan has been renewed.

Mobile number ending in #4898.

You're all set through 03/01/2018. Visit My Verizon at any time to review your account details.

My plan: **$30 UNL TALK TXT NO DATA BNDL**

Thanks for choosing Verizon Wireless.

Tools to stay on track.

Save time with Auto Pay.
Simplify by setting up automatic payments from your checking or credit card account.
Learn more

My Verizon Mobile.
The convenience of My Verizon is there when you are on the go.
Download app

Plans | Phones | Tablets | Accessories | Locations

© 2018 Verizon Wireless

Details of renewed plan clearly and simply articulated.

Recommends other tools to get the most out of your plan.

26

ACQUISITION | ONBOARD | USE & ENGAGE | LOYALTY & EVANGELISM

Awareness > Discovery > Join > Welcome > Engage > Share > Reinforce > Renew

REGISTER

COI

CONFIRM OPT IN

WELCOME

Did Not Engage

MY AARP

LIFE EVENT TRIGGER

MY AARP

LIFE EVENT TRIGGER

RECOMMENDATION TRIGGER

MY AARP

BEHAVIORAL TRIGGER

MY AARP

Did Not Engage

RE-ENGAGEMENT

Did Not Engage

RE-DIRECTION

OPT OUT

SOCIAL MEDIA

ANNIVERSARY ROLL-UP

RENEWAL REMINDER

RENEW THANK YOU

ICON KEY

Digest EM
Behavioral Trigger

Trigger EM
Life Event Trigger

Did Not Engage
Regular Cadence Email

JOAN, 50

NEW MEMBER

HER SITUATION

- Lives with her husband, two sons and mother
- Loves to run on weekends
- Works full time as a teacher
- Recently turned 50
- Has hard time meeting friends and jogging partners

WHY AARP

- Heard about AARP through online research
- Clicked on AARP paid ads on FB
- Wants to be able give back to the community

HER DIGITAL HABITS

- Adapts to new technology
- Uses meditation and health apps
- Active on Facebook, Instagram and Pinterest
- Reads blogs and community reviews to verify her purchases

HER DESIRES

- Eager to learn about how AARP can transform and improve her life
- Attain a healthy lifestyle
- Meet other women like her to participate in health and wellness activities

JOAN, 50
NEW MEMBER

ACQUISITION		ONBOARD		USE & ENGAGE	LOYALTY & EVANGELISM

Awareness	Discovery	Join	Welcome	Enable	Engage	Share	Reinforce	Renew

Paid Post

AARP.org

JOIN
Yes

CONFIRM OPT IN
Yes

COI Email

Email Verification

Welcome Email

Download App

CREATE PROFILE
Add Preferences & Interests

?

My AARP Digest

Search Health Events & Discounts

My AARP Digest

Discover Web Content

Discover Mobile Content

Life Event Trigger

Discover Web Content

My AARP Digest

Recommendation Email

Member Anniversary Digest

Renewal Reminder

Renew Confirmation & Thank You

29

GREG, 62

NEW MEMBER

HIS SITUATION

- Currently working in finance

- Adult kids are out of the home

- Concerned about retirement savings

- Planning for the next step in his life: RETIREMENT

- Budget price conscious

WHY AARP

- Friends are members of AARP

- Sees AARP as a good source for 50+ discounts

- Values time and money saving tips

- Want to live a more colorful and active life post-retirement

- Exploring healthcare options

HIS DIGITAL HABITS

- Basic use of technology/apps

- Has FB but not active

- Reads online news via his PC

- Searches travel deals and destinations with his wife

- Uses Skype to chat with kids and grandchildren

HIS DESIRES

- Maintain healthy physical and mental state

- Having Social Security and healthcare

- Maximize retirement savings

- Make the most of AARP offers

- Get updated news and relevant content to his life

Sources: Marketing to Baby Boomers (Mintel 2014), Conversation About Age (AARP Research 2016), Introducing Boomers (Nielsen 2012) , EMU Members vs. Non-Members (AARP), New Member IDIs (AARP 2017), Simmons (2016)

GREG, 62

NEW MEMBER

ACQUISITION	ONBOARD	USE & ENGAGE	LOYALTY & EVANGELISM

Existing Email Subscriber

Travel Benefits
Earn Points
Travel for Good

AARP

JOIN

CONFIRM OPT IN — Yes

1
Col

Welcome
Next Steps
Mentorship Intro
Complete Profile

Preferences /
My Account

Search for Travel
and Destinations

AARP
Rewards for Good!

News / Program Updates

3rd Party Site to
Book Travel Destination
With AARP Discount

Travel Destination
Booked

Email Confirmation

A.
AARP

B.
Partner Site

C.
25

Benefit Redeemed

How was…

Post Event

AARP

Catered News /
Events
+ Download App

AARP

Doesn't Download App

Event

Around AARP

Example: Yoga Event

Event Recommendations
Health Content
Recipes

Life Event

Retirement

Catered News /
Events Email

Webinars
- Social Security
- Tax Advice
- TaxAid

Additional Webinars

1 Month of Engagement

SyndicatedEvents

Around AARP

General Health
Tax Aid
Social Security
Medicare
Connection with Other AARP Members
Brain Games / Staying Sharp

Renewal Email