

How commercial brands use email for customer experience

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Email still works... just not how you think

- Highest ROI channel
- You own the audience & the message
- Common misconceptions:
 - I'm just spamming my customers
 - Automation is complex
 - Unsubscriptions = failure



Our approach to email & segmentation

- Trigger based journeys
- Segmentation
- Email is tailored, not broadcast

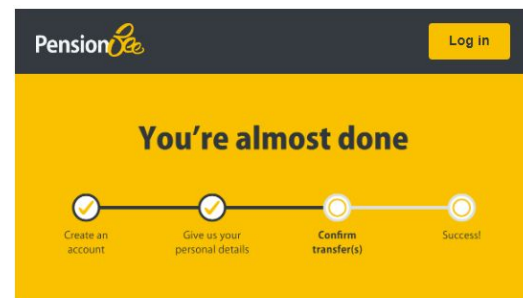


**High-five[']
future you.**

Combine, contribute, and manage
your pension all in one place.

What is a high performing email?

- One clear CTA
- Engaging subject line
- Optimised for mobile
- Consistent tone of voice



Hi Vale,

If you've had several different jobs, it's likely that you've started and paid into various workplace pensions. Not sure who your old pension providers are? Read our blog on [how to find your old pensions](#) so you can transfer them into one new easy-to-manage plan and keep track of your retirement savings.

You're only a few steps away from combining all your old pensions into a new plan that you can manage online and through our app, allowing you to view your balance, make contributions, and track your retirement income projections, all from the palm of your hand.

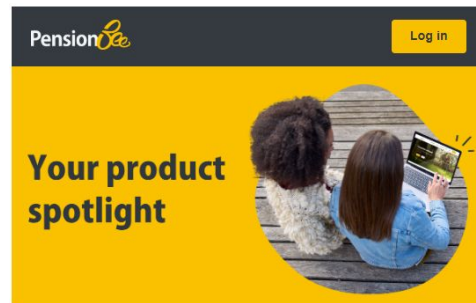
Here's what we need from you to progress your pension transfers:

- **Details to verify your identity** - your address, date of birth, and National Insurance (NI) number. Don't know your NI number? Here's a [guide for tracking it down](#).
- **Information to transfer your pensions** - the name of your old pension provider, and a policy number would help too. Not sure where to start? Here's our [four-step guide to finding your old pensions](#).

Combine your pensions today

Frequency isn't the problem, irrelevance is

- We send multiple times in the first few weeks
- We split by engagement rates
- Testing helps us optimise messaging and timing
- Email is central to our growth strategy



Hi Vale,

At PensionBee, we've always got new product features and updates in the works. In this series, we put the spotlight on some existing features you may not be familiar with or just need a refresher on how they can help you plan for a happy retirement.

This month, we give a quick rundown of our Retirement Planner's 'additional pots' feature to help you see the combined impact of other pensions you hold on your retirement income.

Retirement Planner - get a fuller picture of your retirement income



You're on track to have **£328,167** in retirement. If you take **£26,000** per year, this will last until age **90**

Final takeaways

- Email is a performance channel
- Segment early and often
- Don't fear frequency, fear irrelevance
- Start simple