

How I Think About Campaign Orchestration

10 or 1,000 campaigns a month — no longer an issue. Explore a framework for deciding what gets sent, to whom, and in what order.

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Most CRM teams don't have a campaign problem. They have a **prioritization** problem.

- Every stakeholder has a campaign that "must" go out
- Every campaign has an audience that overlaps with three others
- Every customer wants personalised & valuable offers at the right time

Orchestration is the layer that decides.

Explore the framework I use: 10 pieces that go from **how you classify campaigns**, to **how you score and sequence them**, to **how you measure whether the whole system is healthy** — not just whether one campaign performed.

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01 - FOUNDATION

Start with a single campaign taxonomy

Campaigns shouldn't be organized by who requested them. They should be organized by **the type of impact they have on the customer and the business**. Once every campaign has a type, that type carries a default priority — and service or transactional messages almost always outrank promotional ones.

PRIORITY: HIGHEST

Critical / Service

Security alerts, important notices, document requests, changes to terms.

PRIORITY: HIGH

Transactional

Order, payment, delivery, appointment, and status updates.

PRIORITY: CONTEXT-DEPENDENT

Lifecycle

Welcome, onboarding, activation, usage nudges, retention, reactivation.

PRIORITY: MEDIUM

Revenue / Sales

Offers, upsell, cross-sell, product launches.

PRIORITY: LOW

Engagement / Brand

Content, education, inspiration, community.

PRIORITY: OPPORTUNISTIC

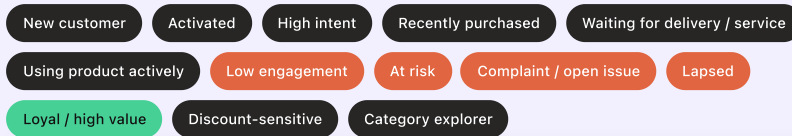
Research / Feedback

Surveys, NPS, interviews, reviews.

02 - AUDIENCE MODEL

Think in customer states, not segments

"Female, 25–35" or "owners of product X" describes who someone is — it doesn't tell you what to send them right now. A **state** does. States capture where a customer currently sits in their relationship with the business, so orchestration becomes a question of "what does this person need right now," not just "which campaign are they eligible for."



WHY THIS MATTERS

If a customer has an open complaint, "discover our new collection" is the wrong message — no matter how well it targets their category affinity. The negative context has to close before anything else goes out.

03 - CATEGORY LOGIC

Eligibility and affinity, before anyone sees a category

With more than a handful of product categories, you can't send everything to everyone. Every customer needs four questions answered for every category, before it's even considered — the goal is a **ranked list** of what's most relevant right now, not a menu of twenty possible campaigns.

1 Eligibility

Can this even be offered? Already purchased, wrong fit, no regional availability, wrong lifecycle stage.

2 Affinity

How likely is this to interest them? Based on views, purchases, clicks, wishlists, past categories, similar customers.

3 Business priority

How much does the business need this category pushed right now?

4 Customer priority

How genuinely useful is this to the customer at this specific moment?

04 - SCORING

The priority matrix

A campaign should win a send slot because it scores highest — not because a stakeholder pushed hardest for it. A simple weighted score turns four eligible campaigns into a clear, defensible order.

$$\text{Priority score} = \text{relevance} + \text{business value} + \text{urgency} - \text{fatigue risk} - \text{conflict risk}$$

ORDER	CANDIDATE CAMPAIGN	WHY
1	Complaint follow-up	Open negative context — must close before anything else lands
2	Delivery update	Transactional, time-sensitive, expected by the customer
3	New product launch	Sent only once context is clear — high business value, no conflict
4	Weekend promo	Lowest priority — sent only if the customer isn't already overloaded

05 - GUARDRAILS

Contact policy & frequency caps

Without caps, a thousand well-targeted campaigns still add up to noise. The policy needs to be explicit — daily and weekly limits overall, per-channel limits, and cooldowns after specific events.

MESSAGE TYPE / RULE	POLICY
Transactional	Always allowed — bypasses frequency caps
Critical / service	Always allowed
Sales promo	Max 2 per week
Survey / NPS	Not within 7 days of a complaint
Push notifications	Max 1 per day, unless critical
Loyal / high-value customers	Lower promo pressure, higher relevance threshold to qualify

06 - CHANNEL STRATEGY

Channels have roles — omnichannel isn't "send everywhere"

The question isn't "should we duplicate this across channels." It's "which channel carries this specific meaning best" — matched to the customer state and the intent of the message.

Push

Quick action, urgency, reminders.

Email

Detail, education, richer content.

SMS

High importance, short, time-sensitive.

In-app

Contextual, while the customer is already engaged.

WhatsApp / LINE / KakaoTalk

Conversational, service-oriented, high-trust markets.

Call

High-value, complex, sales or service moments.

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07 - CONTENT SYSTEM

Personalization as modules, not manual work

Hand-personalizing every message doesn't scale. What scales is a library of content blocks that a CRM engine — or a human — can assemble within rules, based on the customer's state and signals.

- Hero message
- Category block
- Offer block
- Reason-to-believe
- CTA
- Local market adaptation
- Lifecycle-specific copy
- Product recommendation
- Service / context block

Customer state	At risk
Category affinity	Accessories
Recent signal	Viewed product twice
Channel	Email
Tone	Helpful, not aggressive
CTA	Explore / Save / Book a consultation

08 - GOVERNANCE

A campaign control tower

At scale, orchestration needs one place where the whole system is visible — whether that's a BI dashboard, a CRM calendar, a project tool paired with a dashboard, or a CDP decisioning layer. The tool matters less than having a single view.

- Active campaigns and their owners
- Segments touched and audience overlaps
- Where campaigns conflict
- Priority and frequency impact
- Suppressions in effect
- Market / local adaptations
- Results, in one place
- A single, shared source of truth

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09 - RULES

Write the conflict rules down in advance

This is where orchestration actually becomes real — not a philosophy, but a set of if/then rules the system enforces automatically.

IF	THEN
Customer is in a complaint flow	Suppress sales promo
Customer just purchased	Suppress acquisition offers
Customer received a high-priority service message	Delay non-critical promo
Customer hasn't opened 5 messages in a row	Reduce send frequency
Customer shows high intent	Prioritize conversion support
Customer is loyal / high value	Don't over-index on discounting
Customer fits multiple categories	Pick the single top category by relevance score

Measure the system, not just the campaign

Open rate, CTR, and conversion on a single campaign can be misleading on their own — a campaign can convert today and quietly erode engagement next month. The system needs its own set of metrics.

CAMPAIGN-LEVEL (NECESSARY, NOT SUFFICIENT)

- Open rate
- Click-through rate
- Conversion rate
- Revenue per campaign

SYSTEM-LEVEL (WHAT ACTUALLY TELLS YOU IT'S WORKING)

- Incremental lift vs. holdout / control
- Unsubscribe & opt-out impact
- Fatigue score, engagement trend by segment
- Revenue and LTV per customer
- Cannibalization between campaigns
- Retention / repeat purchase
- Complaints after a campaign send

Want this applied to your CRM stack?

This is the framework I bring into consulting engagements and in-house roles — adapted to the platforms, markets, and stakeholders you're actually working with.

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anastasia