The Ultimate Guide to Email Personalization

A Crawl, Walk, Run Approach

Introduction

Personalization has long been a buzzword in digital marketing, especially for email. But personalization can have many meanings and manifestations, ranging from basic use of a subscriber's first name to highly complex campaigns leveraging multiple data points and dynamic content to create truly one-to-one communication. Because of this wide range in execution, it can be difficult for brands to understand how to get started, and what it takes to scale personalization efforts.

In this guide we'll cover the different facets of personalization in email and how to take your program from basic to sophisticated, with actionable tips that can be applied to any email program.

WHAT IS EMAIL PERSONALIZATION?

Personalization involves tailoring your email communication to be relevant for an individual subscriber. Using someone's name in the email subject line is one of the first examples that comes to mind when talking about personalization, but it's so much more than that. While the use of first name is not a bad starting point for incorporating personalization into your program, brands need to take a more holistic view of the customer journey and tailor the email experience to line up with the subscriber's location in the overall customer lifecycle. Truly personalized emails make subscribers feel like a brand knows who they are and what they want to hear about.

WHY SHOULD YOU PERSONALIZE EMAILS?

The more personalized a subscriber's communications become, the more likely that subscriber is to continue engaging with your brand; it increases their affinity for your brand and increases the likelihood of purchase by shortening the path to conversion. Put yourself in your subscribers' shoes: Are you receiving communication that is related to your involvement with the brand? Are messages timely and relevant in their delivery

based on your recent actions and needs from the brand? Or do emails feel generic and like they could be speaking to anyone? Once you establish a good feel of your subscribers' vantage point, use ideas incorporated in this guide to start tailoring their experience more effectively.

IT ALL COMES BACK TO DATA

Without information about your customers, you will be taking a one-size-fits-all approach. While [data collection and organization](#) can be daunting for even the most experienced marketer, start from the basics and work your way up. Basic data to collect in order to tailor your email program includes name, location, birthday, and gender. But taking personalization to the next-level involves layering in purchase history and brand-specific milestones, and leveraging the latest AI to predict a user's next move.

> "If your data is not clean and accurate, it won't be actionable. The use of unreliable data can lead to misguided communication that could leave your program open to unsubscribes and customer service complaints at best, and spam complaints and data privacy fines at worst."

Mandi Moshay
Director, CRM & Email, Tinuiti

While you can never have too much data, proper data infrastructure and data integrity are integral to any email program. Many email service providers (ESPs) will securely house customer data and allow you to customize data points collected. If you are not using your ESP for data collection and storage, make sure you have a secure data warehouse and method of easily syncing this data with your ESP for use in your email program.

Today's consumers have higher expectations for privacy, and laws requiring more transparent and responsible data collection, use, and hygiene mean there are real consequences for failing to be a good steward of your customers' information. Make sure that for every new data collection initiative you commence, you audit your process against relevant data laws. Proof of consent for data collection should be the new norm for any program to help ensure compliance with regulations.

> "Marketers were held back by the limits of legacy technology, which meant that they were forced to either cobble together data from email, direct mail, mobile messaging and other sources or abandon their efforts entirely. However, today's growth marketing platforms not only natively support all relevant communication channels, they also effectively serve as a CRM or hub that ingests data from all sources. With the right tools in place, the only limitation to personalization is your own creativity."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

THE BENEFITS OF TESTING

Whenever making a change or introducing a new element to your email marketing program, we recommend testing to understand the impact. If personalization is brand new to your program, or you need to make the case for further investment in personalization efforts, testing will give you hard data on the resulting lift. Email A/B tests should be run on just one variant at a time to isolate the element that is driving the change in results, and should be replicated to control for external noise that might skew results. Be sure to run results through a statistical significance calculator before implementing any changes as a result of testing.

READY, SET, PERSONALIZE!

Now that you have a good idea of what personalization is and why it is an important step for your email program, let's take a look at how to best get started in your personalization journey.

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GETTING STARTED WITH PERSONALIZATION

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As you begin your journey toward personalization in your email marketing program, it's important to start small and make incremental improvements over time. Setting yourself up for success by getting your data in order and getting a few easy personalization wins will give you the healthy foundation from which to build out a more complex personalized email program.

> "Research shows that 48% of shoppers will share data for a more personalized service, a figure which I would bet is much higher when actually taking consumer behavior into account. More importantly, nearly half of customers would switch to a competitor within a single day of a poor customer experience, so personalization isn't a nice-to-have—it's business-critical."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

Let's start with a few basics:

#1: CONTACT FIRST/LAST NAME

HOW AND WHERE TO COLLECT A NAME

Subject line personalization can increase open rates by 26%, and seeing your own first name in the subject line is sure to grab your attention. While you likely get first and last name data from your customers at checkout, having this information for prospects who have yet to convert can help to grab their attention long enough to motivate a first purchase.

You can easily collect contact names within your email address acquisition points by adding in optional dialog boxes for the subscriber to share their name. Be mindful of how much information you're requesting from new subscribers as asking too much could lead to a drop off in sign-ups.

To avoid asking new contacts for too much information at the point of subscription, consider instead providing a prompt within your email welcome series. Leverage the preference center forms available on most ESPs to capture the most relevant data on your customers. A good rule of thumb is to avoid asking for any information you're not actually going to use. For example, if you don't plan on segmenting your communication based on a subscriber's shoe size, don't ask for it.

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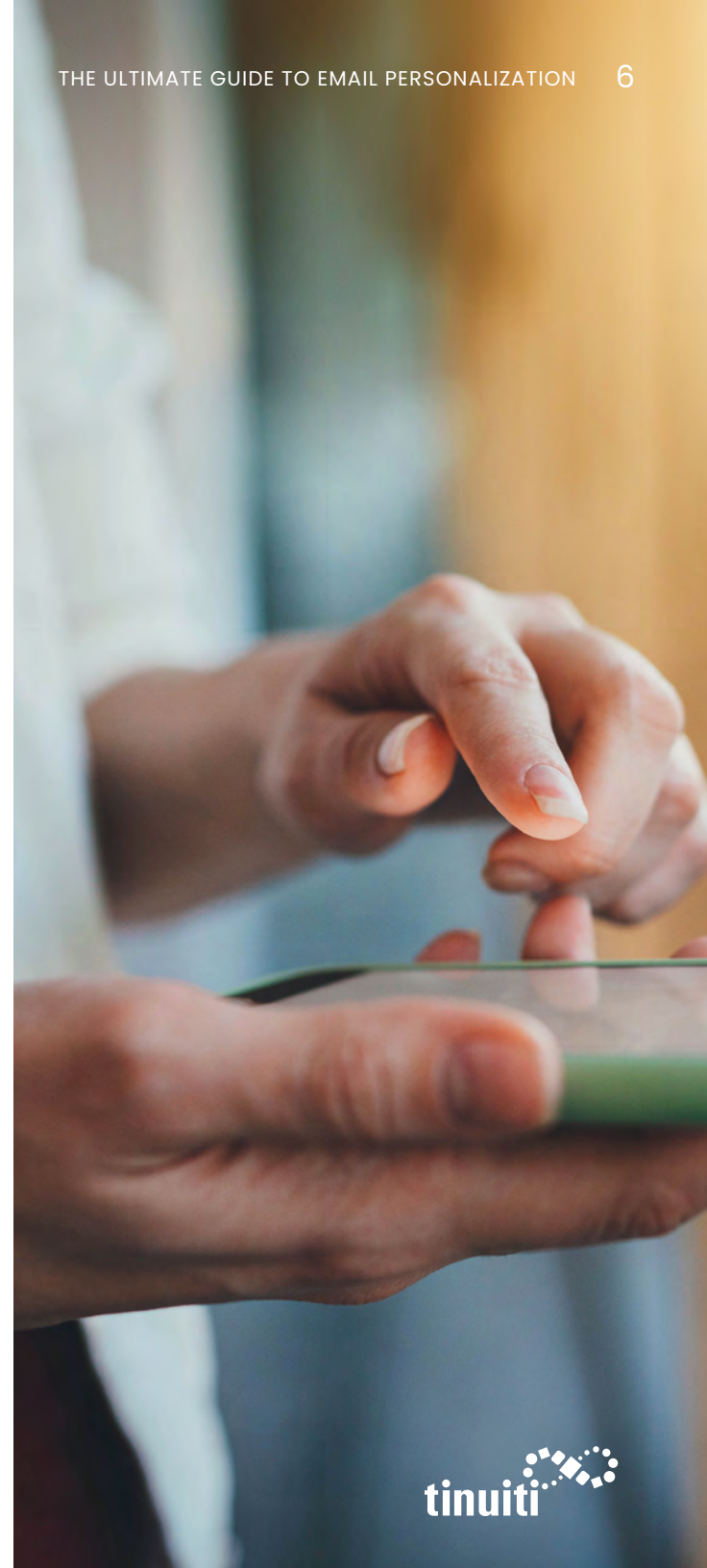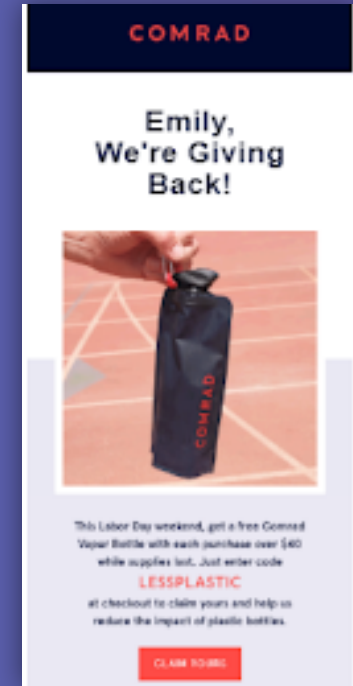
HOW TO UTILIZE SOMEONE'S NAME

A low-effort way to start using a first name is by testing inclusion in the subject line. If you see good success, try adding the contact's name into the body of the email. Be careful to not go overboard with the use of first name personalization; what starts off as friendly and enticing can quickly turn creepy when overused.

#2: CONTACT SOURCE

HOW & WHERE TO COLLECT CONTACT SOURCE

Passing a contact's sign-up source into your ESP allows you to segment contacts based on where or how they came to sign up for your emails. For example, subscribers who sign up for emails via Facebook Lead Ads might need more education about your brand in

the welcome series than a contact who signed up on site. Knowing the channel in which a contact signed up and the creative or incentive that motivated them to do so gives you implicit data that can inform future communication.

> "Analyzing the engagement and conversion data of your email audience by source can give your team valuable insights to help inform marketing strategies across channels. You might be seeing similar ROAS across paid channels, but how do those contacts convert over time? Understanding the lifetime value of subscribers based on source will allow you to better optimize spend across paid campaigns to acquire higher value and more loyal customers."

Mandi Moshay
Director, CRM & Email, Tinuiti

Depending on which ESP and email sign-up overlay provider you utilize, setting up source code is a relatively simple process. In most cases, utm parameters can be parsed and passed into source fields for easy segmentation. If you do not have a dedicated technical team reach out to your ESP or overlay provider for help or documentation.

HOW TO UTILIZE CONTACT SOURCE

Utilizing a contact's source can be as simple as pulling field data with the use of merge tags. For example:

Thanks for stopping by the Tinuiti Booth at the %%source%% turns into
Thanks for stopping by the Tinuiti Booth at the Internet Retailer Conference

You can also use source information to determine the content of onboarding emails like the example with Facebook Lead Ads above. Another use case would be if someone subscribes via your website footer rather than a pop-up that offers 20% off a first purchase. Someone who took the time to seek out a sign-up opportunity in the footer is likely of higher intent, and can be served a welcome email without a discount, leading to a higher margin for your brand on the first purchase.

#3: EMAIL ENGAGEMENT ACTIVITY

HOW & WHERE TO COLLECT EMAIL ENGAGEMENT ACTIVITY

Utilizing email engagement activity is one of the easiest and most effective ways to increase ROI, making it a must for those dipping their toes into email personalization.

Collecting email engagement activity is especially easy because most ESPs do it automatically, meaning there's no extra work for you, the marketer. Basic engagement data includes the emails a user opened, clicked, or converted from, but more robust segmentation opportunities abound when you begin digging deeper: what links did contacts click in a particular email? How many emails has a user received but neglected to open? What time of day or day of week are subscribers opening, clicking, or converting most often? The insights you'll glean through an analysis of engagement data can inform subject lines, email content, landing page links, promotional strategy, send time and day, mailing cadence, and more.

HOW TO UTILIZE EMAIL ENGAGEMENT ACTIVITY

Consider the following use cases for engagement data in your own program:

- **Determining your active audience**
  Set a threshold for opened or clicked within a certain number of emails/period of time to inform which contacts you'll mail to regularly.

- **Identifying unengaged contacts for reactivation**
  Set a threshold for contacts that haven't opened or clicked within a certain number of emails/period of time to run through re-engagement efforts or remove from the list for hygiene purposes.

- **Using click data for segmentation**
  Use link clicks to determine contact interests or product affinity and use that information for better targeting. Example: Retarget contacts who clicked on sale/clearance links within your emails and follow-up with additional items that have been added to the sale section of your site.

- **Finding the best time to send**
  Analyze open, click, and purchase data across mailings to determine when users are most likely to engage or convert. Pro tip: the times they are most likely to open an email might not always line up with the times they are most likely to make a purchase.

To take things a step further, you can move forward with A/B testing to better understand your audience's email engagement preferences.

#4: PURCHASE DATA

HOW & WHERE TO COLLECT PURCHASE DATA

As with engagement data, most ESPs make it simple to collect and segment on purchase data. Details of a customer's order should pass right into the ESP in real time, allowing you to trigger post-purchase messaging and leverage additional details from their past purchase behavior to tailor future communication. Depending on the platform you're using, additional tracking code may be required to pass conversion data into the ESP, so reach out to your platform's customer service team for documentation and set-up instructions.

HOW TO UTILIZE PURCHASER DATA

Consider the following use cases for engagement data in your own program:

- **Identify your active shoppers**
  Set a threshold for 'placed order within a certain number of emails/period of time' to understand the make-up of your marketing list. Contacts who have both engaged with emails and placed a recent order are ripe for retargeting. Prime this audience for a subsequent order by reminding them what they loved about their first purchase and encouraging them to try something new.

- **Segment your non-purchasers for ongoing nurturing**
  Create a segment of contacts who are engaged with emails but have not converted and consider taking a more aggressive approach with your mailing cadence or promotional strategy, or communicate guarantees like free returns to remove anxiety from the purchase process.

- **Find common attributes amongst repeat purchasers**
  Analyze the products and promotions that compel most buyers to come back again and again to inform email merchandising and discounting. This type of data can also help you formulate the building blocks of a loyalty program.

- **Create cross-sell or upsell triggers**
  Cross-sell products by creating a segment of contacts that purchased X product, sending them an email with a complementary product. This can be set up as an automated flow in most ESPs.

"Every product your brand sells contains metadata: its size and dimensions, color and material, make and model, and countless other data points that might be specific to your business. This metadata is essential for advanced personalization without a large engineering lift, so make sure your ESP has the capability to store it as a catalog for individualized recommendations."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

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#5: MILESTONES

HOW & WHERE TO COLLECT MILESTONE DATA

Milestone data points involve celebrating a contact at a particular point in their personal or customer journey; birthdays, first purchase date, email sign-up date, loyalty program joined date, etc. Celebrating these distinct touchpoints allows you to connect with your contacts on a one-to-one basis fairly easily.

Most ESPs timestamp milestone data points automatically. For the data points that aren't tagged automatically, set up your own tagging system using a trigger. Some milestone data points, like birthday, will need to be collected at the point of acquisition much like first name, or via a preferences campaign.

HOW TO UTILIZE MILESTONE DATA

The easiest way to celebrate a milestone is by deploying a celebratory automated campaign to your contacts. Take for example, a birthday campaign. Set automation to trigger either on the person's actual birthday, at the beginning of their birthday month, or a week or two prior to the person's birthday. Include a celebratory message calling out their birthday specifically, and offer up a "gift" from your brand in the form of a discount or other promotion.

> "Genuinely wishing your customer a happy birthday makes them feel like part of your brand family. If you are going to serve a "gift" that requires venturing in-store to obtain, serve an additional coupon to make the trip worthwhile. A tangible gift, plus a percentage off to shop around the store is a more immersive experience."

Keri Brooks
Strategist, CRM & Email, Tinuiti
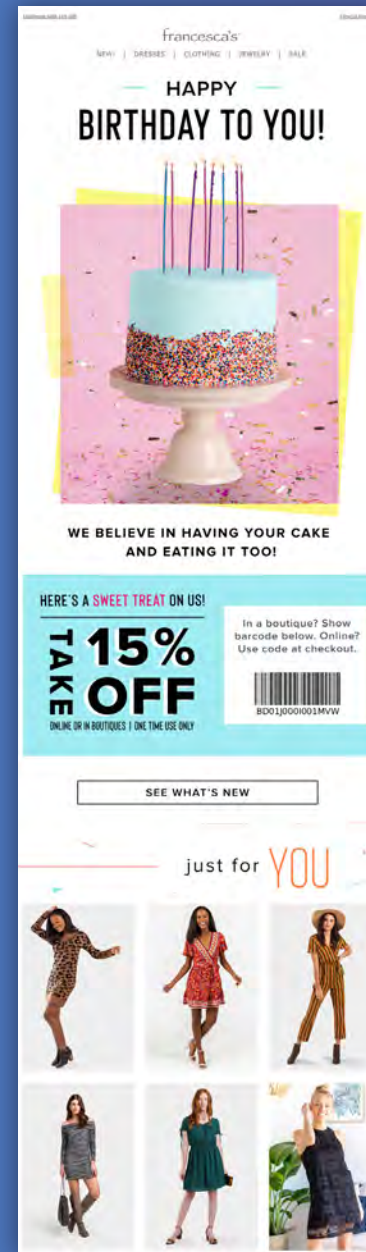
Celebrate small victories like purchase anniversary. The date that a customer first purchased provides a prime opportunity for a winback campaign if that contact is not currently active, or to further celebrate their loyalty if that contact is still actively buying and engaged with your emails in the present date. Thank that contact for the past year they've spent with you, recap their ordering history if you've got the data, and provide an incentive for reordering. Tailor the message based on their current level of engagement - either a "thanks for a glorious year together" or a "we miss you - come back and celebrate our anniversary" message, depending on the history.

"Birthdays and anniversaries are excellent opportunities to keep your brand top-of-mind, but remember that they only happen once a year. Without sending any other personalized communications the rest of those 364 days, marketers likely won't achieve the ROI they're after. Additional milestones you can celebrate with your customers include achievements related to your loyalty or rewards program and activity tracking in year-end or month-end reviews. The most successful milestone campaigns are the ones that provide a relevant offer, are built with individualized data and affirm a customer's relationship with the brand."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

WALK

IT'S TIME TO LACE UP YOUR SNEAKERS.

Now that you've got a handle on the core components of email personalization, it's time to dig deeper into your email program to build out or optimize your campaigns with more advanced personalization.

#1: WEBSITE ACTIVITY

HOW & WHERE TO COLLECT WEBSITE ACTIVITY

The way a shopper behaves on your website can shed light on their level of interest in your brand, intent to purchase, and the collections or product categories they're most interested in. Each of these data points opens the door for better retargeting and personalization, and can drive conversions, AOV, and higher loyalty and lifetime value.

Many collection points for website activity are pre-built into your web platform or ESP, though additional tracking code may be required to power some functionality depending on your technology toolset. Check with your service providers for more details. As with any responsible data collection methods, make sure you test and validate the data for accuracy of both data points and data mapping before you utilize web behavior in any campaign. Test orders and onsite sessions make for an easy check point for data validation, and ensure you won't miss the mark and alienate customers with inaccurate messaging, which can lead to unsubscribes or—worse yet—the loss of a customer.

The collection of web activity at the user level is subject to privacy laws, so make sure you are providing full transparency to your customers regarding the type of data you're collecting, how it will be used, and outline usage via your company's privacy policy.

HOW TO UTILIZE WEBSITE ACTIVITY

Once your integrations are complete and data has been validated, you're ready to take advantage of this valuable dataset. While there's a number of use cases for website data across all email campaigns, the best way to drive quick revenue from activity data is to build a more robust set of triggered campaigns to nurture shoppers throughout the funnel to conversion.

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VIEWED A PRODUCT

Think of viewing your product onsite as your subscriber window shopping—they are interested, but not quite ready to go further. Subscribers who stop viewing products onsite should be nudged toward adding items to their cart, and ultimately completing checkout. Use the viewed product data to dynamically populate a browse abandon trigger with the item(s) your subscriber viewed onsite and provide a solid value proposition for them continuing the buying process. You can further customize your browse abandon triggers by developing different variations depending on the specific product or category the browsed item lives in. Breaking down the messaging to a more granular level allows you to tailor the experience even further for your subscribers and provide specific product or category information. Also consider adding in additional recommendations for other products your subscriber might like based on their browse data.

> "The best browse abandon experiences use the trigger for delivering valuable product insights, information, and recommendations, instead of serving as a creepy 'we saw you watching us' approach. Think about if you were the customer: what information would you likely need next to make a solid purchase decision? Use this mindset to develop your content."
>
> **Emily Collins**
> Senior Manager, CRM & Email, Tinuiti

You can even use viewed product information to power low inventory triggers. When an item is low in stock and likely to sell out, the risk of FOMO becomes very real. Let customers who have viewed that product recently have first crack at buying up the last of the inventory. Creating this urgency to purchase helps eliminate hesitation for subscribers who have already expressed interest in an item.

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ABANDONED A CART

Cart abandoners have shown a high level of interest in your product(s), but for whatever reason have failed to complete the checkout process. Use a cart abandon trigger to speak directly to your subscriber to encourage them to come back and complete their purchase. Be sure to display their carted products to show them what they've left behind, and layer in positive customer reviews specific to the products they've abandoned to help motivate them to come back. Dynamic product recommendations make for a perfect final touch, showing subscribers additional items or categories that might be of interest.

> "Adding a cart abandon flow to your trigger program often results in immediate program impact through increased revenue. Most users today expect to receive cart abandon emails, and can even rely on them to help keep them on track in their shopping experience. Providing your customers with a personalized cart abandon experience across platforms increases the likelihood of them purchasing now and ongoing."

Emily Collins
Senior Manager, CRM & Email, Tinuiti

PLACED AN ORDER

Once your subscribers have placed an order, be sure to continue sending messages relevant to where they are in the customer journey. Beyond pulling in information about their recent order, a post purchase email can be used to provide tips or tricks for using or caring for your product. This shows your subscribers that you value them as a customer and are concerned with their brand experience outside of the transaction. That said, you can generate a bounceback by recommending accessories, add-ons, or complementary products across other categories. Refer to the purchase data recommendations in the Crawl section for further personalization options once a subscriber converts.

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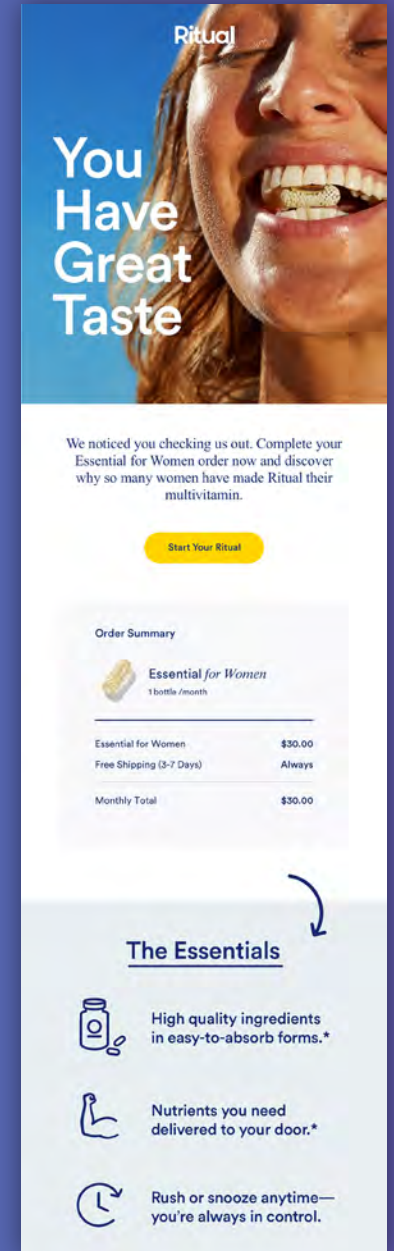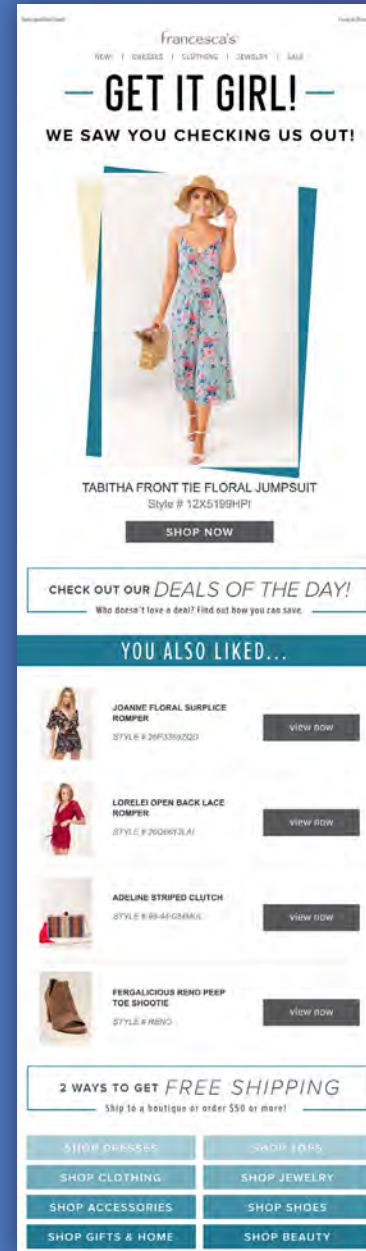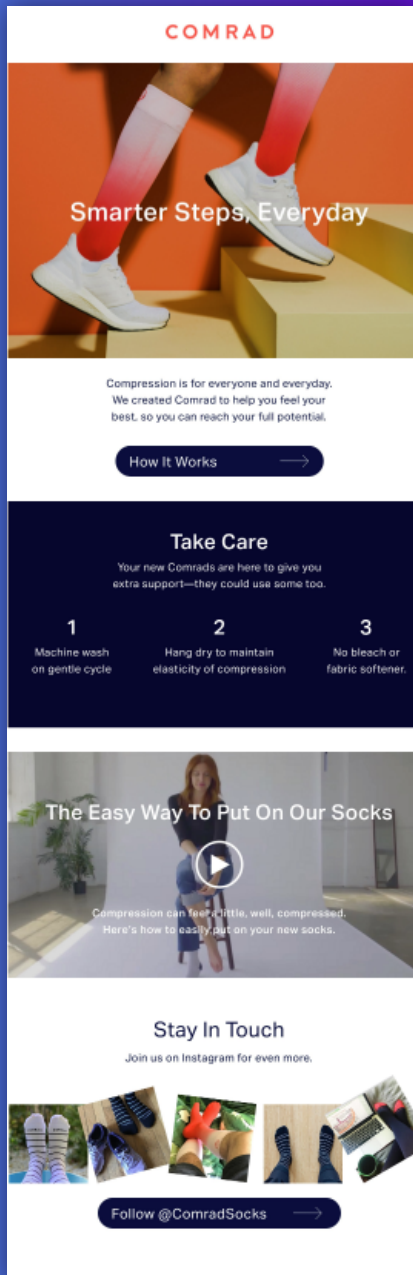
UNLOCKED AN INCENTIVE

An underutilized opportunity to connect the email and web-browsing experience is to display coupon codes or other relevant information during the subscriber's onsite session. One great example here involves using dynamic links to pass unique coupon codes from an email to a website banner or to auto-apply in the cart. By making coupon usage easy for your subscribers, you automatically remove friction in the path to purchase.

Easily increase conversions for net new contacts by dynamically including their unused welcome coupon code within calendar sends and automated triggers (where the incentive already included in the content is not greater). If a contact has not yet utilized their welcome code after entering through the point of acquisition, serve the code dynamically via a banner at the top of your email or at the close of the main of the call to action. For example, 'Don't leave your welcome offer on the table, use (coupon code) before it expires in (X) days.'

> "Be thoughtful in the placement and inclusion of dynamic banners within your email campaigns. Just as consumers can have banner blindness on websites, the same can happen within emails messages. Dynamic banners, when done right, can result in high conversions and can be great tools for cross-selling, up-selling and reminding your audience of any incentives left on the table."
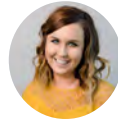
Keri Brooks
Strategist, CRM & Email, Tinuiti

#2: GENDER

HOW & WHERE TO COLLECT GENDER

For retailers who offer products that are grouped in gendered categories, collecting the gender a user identifies with or the gendered category of products they're interested in can be a valuable tool for serving more relevant and personalized content.

"Targeting by gender should be approached thoughtfully with <u>an eye toward inclusion</u>; not all women like pink. Remember that behind every email address is a nuanced human being, so even if you have their gender, don't box your customers in with stereotypes."

Mandi Moshay
Director, CRM & Email, Tinuiti

Some ESPs can analyze your contact's email address, among other known contact attributes, and can assign a fairly accurate prediction of a user's gender. There are also third party tools and applications that can analyze your contact base and assign a gender specification to each contact. Aside from utilizing your ESP (or other vendors) to gather this information, you can also capture gender just as you would birthday or name, within your acquisition process, or with a manage preferences page. For existing customers, using purchase data can be a somewhat reliable source of future interest, but keep in mind that users shop for people other than themselves, so their past purchase behavior may not be 100% indicative of future interest.

HOW TO UTILIZE GENDER

Gender data can be used in both triggered messages and calendar campaigns to add a layer of personalization to your email merchandising.

CALENDAR CAMPAIGNS

Segment your audience based on gender and test how they respond to representative images or copy.

- Use the email hero image to represent the target gender (or include both male and female imagery for those contacts whose gender is unknown). Catering the hero image and products within an email to a specific gender <u>can increase clicks as much as 30%</u>.
- Test whether gender-specific copy increases engagement using gendered pronouns or a more masculine or feminine tone. Again, tread lightly so as not to offend users with traditional gender roles or stereotypes.

"If you're a brand that focuses on a particular gender, look for ways to be inclusive. Think of those that buy gifts for the opposite gender and are on your mailing list. Just because your brand only offers products geared toward a particular gender doesn't mean your emails have to speak to that audience exclusively."

Keri Brooks
Strategist, CRM & Email, Tinuiti

TRIGGERED MESSAGES

You can also utilize gender to personalize automated flows. For example, if a contact signs up for emails and indicates their gender preference at sign-up, you can create multiple paths for your welcome series based on gender. Target males with men's products or lifestyle imagery with male models, and include a sub-banner for cross-selling women's products; the email has something for everyone, encouraging the user to shop for themselves and for others.

Layer gender data with purchase behavior to create a highly personalized post-purchase journey. If you know a contact is a female and they purchased a women's product, include a cross-sell section with 'top gifts for him' as the secondary copy.

#3: LOCATION

HOW & WHERE TO COLLECT LOCATION DATA

Location data can tell you a lot about a subscriber, including their nearest store location, the climate, or their local sports team. Whether broad or narrow, this data can be leveraged to inform email merchandising, drive omni-channel conversions, or fine-tune your storytelling.

The easiest approach to collect a subscriber's location is to use their address from their purchase data. Aside from confirmed addresses, many ESPs are able to provide geolocation attached to a subscriber's IP address. If you do not have any of these options, consider collecting location information at sign up, such as city and state or zip code.

HOW TO UTILIZE LOCATION

Using location data in email can be a fun way to speak to a subscriber more directly about their current environment. It's almost always sunny in Florida, so those subscribers will have no interest in your email about snow gear. Consider how the climate will inform your subscriber's needs, which will influence their purchasing decisions, and tailor from there.

If your brand has a brick and mortar presence or is sold in certain stores, location data can be a valuable tool for omni-channel customers. Use a subscriber's location to dynamically populate their nearest store location and promote in-store events or sales, or to generate foot traffic to new locations.

> "Bridging the online and offline is vital to create a seamless customer experience. Our retail clients achieve this by triggering communications based on consumer behavior. For example, hair coloring subscription service Madison Reed sends a series of messages after a customer's first order containing how-to videos and custom tutorials to set them up for success and increase the likelihood of subsequent orders. Integrating direct mail also enables them to send personalized postcards by location to drive reactivation."
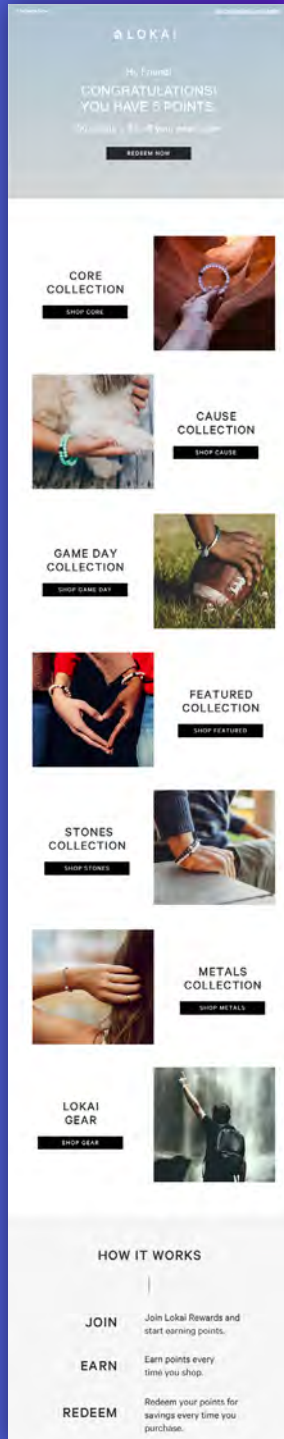
Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

Location data can also be used to suppress users from certain sends. For example, if there's been a natural disaster in a particular location, removing subscribers in that geographic region from receiving promotional messages can help your brand prevent the appearance of being tone deaf.

#4: LOYALTY

HOW & WHERE TO COLLECT LOYALTY DATA

Subscribers who join your brand's loyalty program can (and should) expect special treatment. These subscribers have shown their dedication to your company, and in turn deserve to be recognized and rewarded with more personalized service. Given the amount of data you have on loyal customers, and the additional information provided via loyalty program sign-up and engagement, this doesn't require much heavy-lifting.

Many loyalty platforms offer easy data collection and automated loyalty content. But even without a loyalty vendor, you can still create a basic loyalty program for your brand using just the data in your ESP. Collecting data such as number of purchases, order frequency, and total spend with your company will illuminate your true VIPs. Segment-driven triggers based on predetermined thresholds can mimic a basic loyalty program.

> "Loyalty programs build upon your customer's existing habits with your brand to increase their lifetime value. Loyalty program development can be a great next step for any brand looking to increase their repeat customer rate and capitalize on their most active customers."
>
> **Emily Collins**
> Senior Manager, CRM & Email, Tinuiti

HOW TO UTILIZE LOYALTY DATA

Most loyalty programs allow for the accrual of rewards, which gives brands several milestones to communicate or celebrate. Send your loyalty members emails when they are close to reaching specific milestones to encourage further activity to unlock those benefits; when they reach the milestone, follow-up with a celebratory message to recognize their achievement and deliver on the promised rewards. When rewarding loyalty members with a discount or freebie, consider adding dynamic, personalized product recommendations for a more personalized experience (see the Run section for more details).

You can also personalize other email communications with rewards data through the simple inclusion of dynamic banners displaying that customer's reward balance. Including current balance helps incentivize your customers to shop with you again so they can generate more rewards. Be sure to change up the way you include rewards updates from time to time to prevent your subscribers from getting banner-blindness.

VIP status can be recognized in a number of ways outside of the loyalty program. Consider offering early access to sales or exclusive gifts with purchase to your most important subscribers to make them feel valued regularly. Even using a VIP from name is proven to increase purchase intent; being given special treatment makes customers want to return the favor.

> "Some of our clients' most profitable emails during holiday open up early access to the season's deepest promos just for their VIP customer group. Reward your most loyal customers and show them you appreciate their patronage through tangible benefits. They'll be more likely to remain loyal to your company when they see you returning the favor."
>
> **Emily Collins**
> Senior Manager, CRM & Email, Tinuiti

#5: CROSS CHANNEL SIGN-UP

HOW & WHERE TO COLLECT CROSS-CHANNEL DATA

If you're running an SMS Program, have an App, or utilize Facebook Messenger, be sure to integrate the platforms that power those programs with your ESP to get a clear picture of the full swath of communication being sent per contact.

HOW TO UTILIZE CROSS CHANNEL DATA

Knowing the channels in which you're communicating with a customer will help to inform the planning and prioritization of future messages. If an email contact hasn't taken action to sign-up for SMS, dynamically include a banner within your emails to invite them to sign up. You can also target acquisition overlays based on contact program affiliations. If a contact comes to the site from an email campaign, target that contact with an overlay asking them to opt in to the SMS channel. Include an incentive to increase conversion and adoption of the SMS channel.

Better still, understanding the channel on which a customer prefers to engage can help you lean into one messaging system and pull back on another. Allow the customer to set their preferences, or utilize engagement and conversion data to assign a preferred channel.

> "To get started incorporating additional channels into your marketing strategy, your first step should be to map out your customer journey so you can identify critical touchpoints for conversion and build messaging workflows with the right enter and exit criteria. Most importantly, make sure you're avoiding data silos and creating a seamless customer experience by selecting a growth marketing platform that natively supports cross-channel engagement."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

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RUN

IT'S TIME TO PICK UP THE PACE.

So you've got your data in order and you're a lean, mean, personalization machine. You're leveraging engagement, conversion, and website behavior to power relevant triggered campaigns and tailor communication across your program. You see the value in personalization and want to take things to the next level.

If you've mastered the fundamentals covered earlier in this guide, you may have exhausted the functionality available within your ESP. You may have also been powering your personalization through a manual approach, meaning the effort to scale up might have been resource-intensive. If that's the case, it may be time to look to a third party tool.

HOW THIRD PARTY TOOLS POWER MORE SOPHISTICATED PERSONALIZATION AT SCALE

A quick Google Search of 'email personalization' will lead you into the vast unknown, scrolling through pages of articles, how-to guides, and vendor recommendations, with various software providers proclaiming that they provide the best dynamic tool for increasing conversion rates tenfold. We get it; it's overwhelming. Especially, if you weren't aware that this type of technology was out there. You think to yourself, "where should I even begin?"

Before setting out to identify a new technology partner, spend some time documenting pain points with your current process and your most desired future functionality to guide your conversation with potential partners. Remember, the ultimate goal here is to demonstrate that you know your audience and want to deliver content that is most relevant to where they are in their lives. Brainstorm with your team those campaigns you'd most like to execute if there was no limit to what you could do; what would most surprise and delight your users? Use the outcomes of those sessions for your wish list. Don't worry, we'll share some fun ideas below…

You'll also want to reach out to the account managers at your ESP, web platform provider, and any other technology vendors that help power data collection and its use in email to determine integration options.

> "Whenever considering a new technology tool or vendor, it's worth your time to research compatibility. Some tools will be better suited to pair with your existing technology mix than others, and any pre-built integrations will save you a lot of time and development resources, allowing you to hit the ground running with new capabilities sooner."

Mandi Moshay
Director, CRM & Email, Tinuiti

Ready to run?

Depending on your brand, there's a myriad of fun, unique personalization opportunities out there. Here's just a few of our favorites:

#1: PREDICTIVE ANALYTICS

Predictive analytics offer a crystal ball view of the future. Tools offering this data have complex algorithms that utilize data from across your audience (and sometimes outside of it) to look for cues that indicate when and how a user will engage or convert in the future.

Different tools (and now some ESPs) can provide varying levels of analytics, but some of the data points that are common include risk of churn, level of purchase intent, expected date of next purchase, favorite product category, and future value. Most importantly, they help you as a brand better understand your subscribers at a more granular level, enabling you to serve them what they want or need at exactly the right time (sometimes before they even know what they want or need themselves!).

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> "You don't need a full data science team to leverage predictive analytics effectively. Look for out-of-the box tools to develop your program and test the effectiveness of predictive analytics before you invest in expensive data analytics resources. Chances are for most programs, basic to intermediate predictive capabilities provide a solid ROI without getting bogged down in the build."

Mandi Moshay
Director, CRM & Email, Tinuiti

A few predictive data points to start with include:

- *Purchase intent:* Knowing how likely a user is to purchase can help you to tailor the cadence and content of your messages. Users with high intent are likely to buy with a gentle nudge, while those with lower intent might still convert, but could need more frequent nudges or a discount to tip them. Testing different approaches based on intent can help to control margin and drive up AOV by allowing brands to pull back on discounting for those users who don't need the extra deal-sweetener.

- *Predicted date of next order:* Mid-range and more sophisticated ESPs are able to aggregate contact buying habits and predict when they might place their next order, allowing you to automatically deliver an email with suggested products at the right moment. Need proof this works? One Tinuiti client saw a 433% lift in placed order rate when testing a predictive trigger on their winback series versus a static 90-day post-purchase milestone.

- *Preferred category:* Determining the category most preferred by each user allows you to better merchandise your emails with the product that most interests them. One Tinuiti client leveraged preferred category data to better tailor emails for their customers who prefer products from the full figure category. Emails were created for full figure shoppers with imagery of plus size models more representative of the audience, leading to a 105% increase in conversion rate.

- *Predicted lifetime value:* Struggling with when and where to serve incentives within your emails? By examining a contact's historic value, purchase frequency, and predicted date of repurchase, a predicted lifetime value can be generated. This can allow you to better understand who among your contacts is most loyal or most likely to convert at a higher
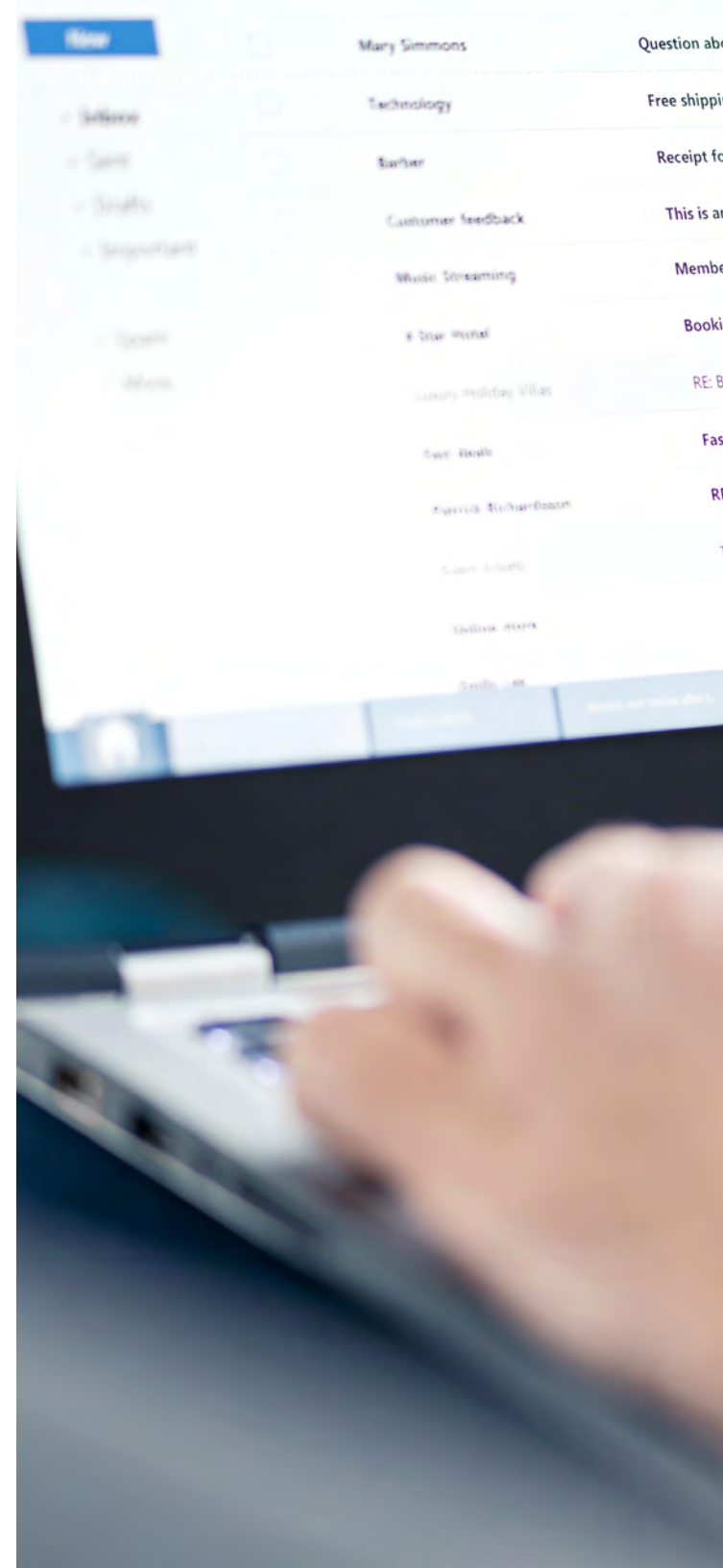
AOV, or conversely who potentially needs a push to convert. Consider tailoring your messages based on predicted future purchase value: If a contact is projected to spend under $100, they may need an additional incentive to convert, like free shipping or a gift with purchase. Customers who are predicted to spend $300+ probably don't need an incentive to make a second purchase; they've given enough indication of intent and loyalty that nurturing content will do the trick.

"An under-recognized benefit of using artificial intelligence to power your email campaigns is the ability to control margin. Predictive analytics tools can analyze a user's level of purchase intent to help dictate the incentives served. Those with high interest are likely to convert with a gentle nudge of the shininess of new product. Preserving your discounts for those contacts who need them most will drive up AOV and LTV across your customer base."

Mandi Moshay
Director, CRM & Email, Tinuiti

#2: DYNAMIC PRODUCT RECOMMENDATIONS

While some ESPs have recommendation engines built in, others will require a separate tool to power recommendations in emails. No matter the source, dynamic recommendations can add personalization with ease, and having flexibility in the rules and recipes can unlock serious merchandising and conversion opportunities.

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- *Best-sellers:* Dynamically display the products generating the most interest across your business in a welcome series or calendar campaign to get shoppers excited and add an element of social proof to your merchandising. No need to manually update your campaigns as collections and trends shift.

- *New arrivals:* If your collections are regularly refreshed, using dynamic blocks to serve up product that's new to the site can keep any campaign fresh, and it only needs to be coded once!

- *Expand your collection:* Utilize a "frequently purchased together" rule to cross-sell similar or complementary products based on a user's browse or purchase history. The data is aggregated from behavior across your entire audience and can help drive up AOV as you entice users to add more to their baskets.

> "Successful dynamic product recommendations rely heavily on purchaser data to map propensities. Look into 3rd party tools to get off the ground quickly with accurate recommendations. Effective recommendation tools provide a significant lift in average order value by assisting customers in finding their next favorite product."

Emily Collins
Senior Manager, CRM & Email, Tinuiti

#3: BRAND ENGAGEMENT DATA

Recognizing your customers for their engagement with your brand is a great way to make them feel like they matter to you personally. Analyzing and showcasing an individual's interactions with your brand allows for a better understanding of their loyalty to your company and products and illuminates opportunities to deepen the relationship.
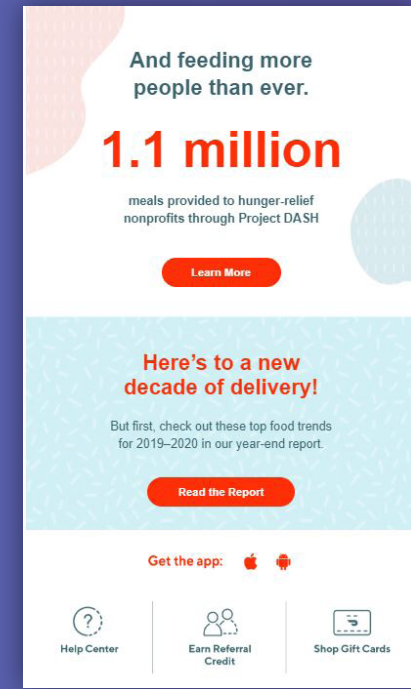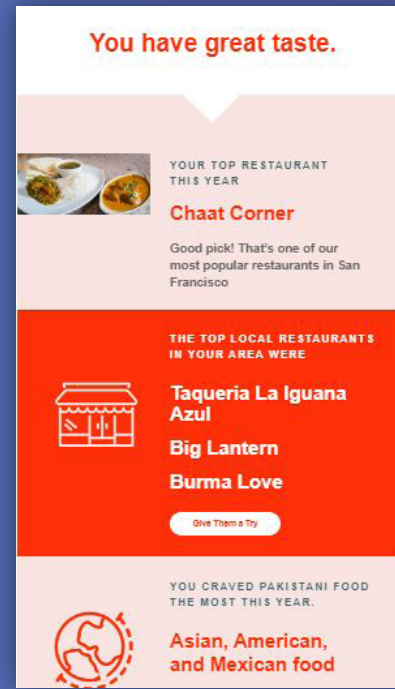
A couple great ways to utilize overall brand engagement data include:

- *Social impact report:* If your brand gives back in some way, be sure to tie the company's contributions back to the individual consumer. For example, if your company donates 5% of all purchases to a charitable organization, send periodic emails to your users specifying exactly how much they added to the overall contribution, letting them know you couldn't do it without them. This has the added benefit of reminding consumers that their purchase does good in the world, motivating them to return to your brand in the future.

- *End of year recap/review:* Help make your customers feel like they are a crucial part of your business by sending out end of year recaps. For example, a travel booking site might send a recap highlighting the number of countries visited in the past year, or the total miles flown. This shows the user you're paying attention to them as an individual and gets them excited about booking future trips.

These types of emails pull in all of your data, whether it's holistically, or on an individual consumer level, and apply a touch of human nature to a piece of technology driven marketing.

#4: WEATHER

The weather forecast tied to a subscriber's location can be used in a variety of ways to either sell products, or simply help users get the most out of your product or service given the conditions.

Examples include:

- For apparel retailers, dynamically display seasonally appropriate clothing or footwear in your imagery. Springtime in LA might mean espadrilles while springtime in Seattle calls for rain boots.
  - ◇ There's no need to speak to the weather specifically, but you'll be able to present the most relevant products to your readers no matter where they are in the world.

- For sporting retailers or event-based companies, use the weather forecast to help users prepare for the conditions.
  - ◇ Sell golf clubs? Add the weather forecast into emails for subscribers in sunny locales to get them excited about hitting the links.
  - ◇ Sell concert tickets? Prep attendees for the weather, recommending they pack an umbrella instead of sunscreen.

"Localization, or adapting your content to a specific locale or market, is a powerful strategy to create an individualized experience and convert customers into brand advocates. In addition to incorporating the weather, other methods of localization include translating into a subscriber's preferred language and offering information about the store closest to them. When using geolocation data, just make sure that your customers are providing explicit consent to share this information with your brand and keep them well-informed with how this opt-in will benefit them by using clear and transparent messaging."

Alyssa Jarrett
Director of Brand & Content Marketing, Iterable

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Summary

The value of personalization in email is well documented, but the effort required to go from batch-and-blast to a fully personalized 1:1 email program is not insignificant. When approaching this fundamental shift in your email marketing program, take it one step at a time.

> "If you're just getting started, utilize calendar campaigns to get the most bang from your personalization buck. Targeting a large audience with even small elements of personalization will help you understand the effect a more tailored approach has on your audience, giving you the data and the motivation to continue drilling down to a more granular approach. Analyze data regularly to understand what's working and what's not, and identify areas of future opportunity where you're most likely to see success."

Mandi Moshay
Director, CRM & Email, Tinuiti

If you've been using some personalization tactics here and there, start taking a deeper dive into testing and optimization and evaluate the level of effort to execute each task. Ask yourself: can my tools be doing more for me or—more importantly—for my customers? Or is it time to invest in the tools that will help these efforts scale without requiring more manpower?

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No matter where you are in your journey, Tinuiti's team of CRM & Email experts is here to help. Get in touch:

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