



# The Guide to Marketing Maturity:

## 3 Levels of Personalization



# Introduction

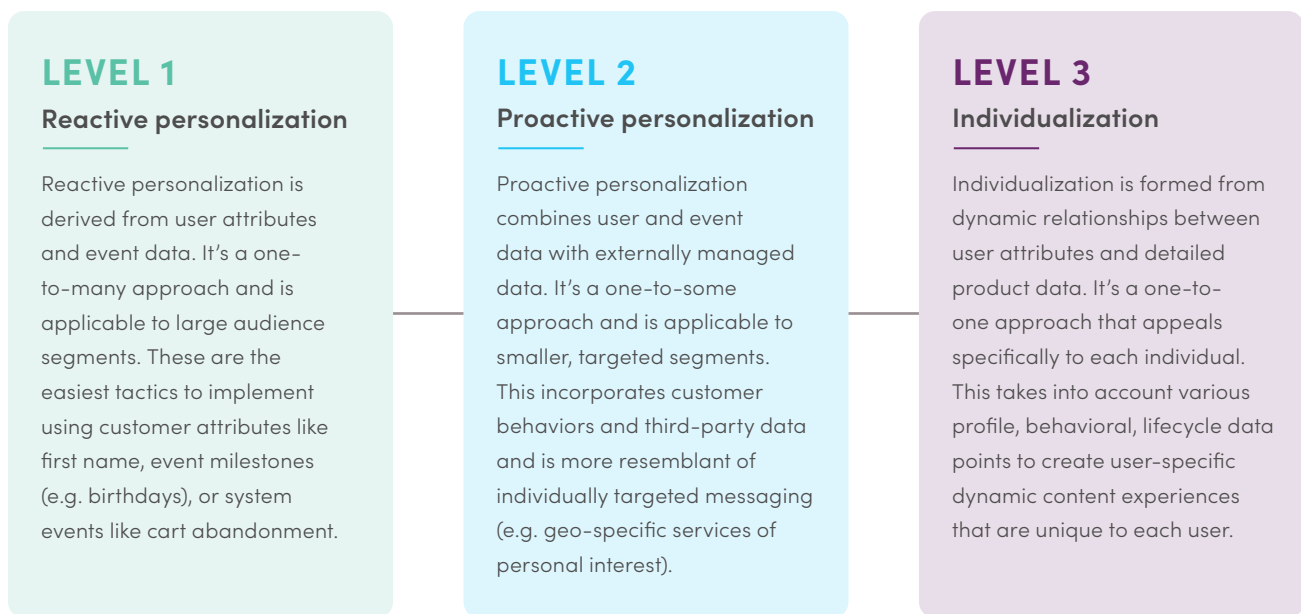
Personalization is touted as one of the core tenets of cross-channel marketing, and for good reason.

Studies show that [91% of consumers are willing to buy from brands that offer relevant recommendations](#). And companies that provide an [emotional connection with customers outperform their competitors by 85%](#).

What's more, [72% of consumers say they only engage with personalized messages](#), further reinforcing the need for brands to deviate from the “spray and pray” approach to marketing.

As a B2C marketer, your goal is to establish a 1:1 connection with your audience throughout the lifecycle.

To get there, you must understand the foundation of personalization, broken down into three levels.



In this guide, we'll walk you through each level of personalization. You'll learn the differences between data types and why they're essential, and you'll see some real-life examples of companies that understand the [art of personalization](#).

Afterwards, you'll be able to create highly personalized cross-channel campaigns that make your customers feel like they're VIPs.

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# Level 1: Reactive Personalization With User and Event Data

## What Is User and Event Data?

### An Overview: A Treasure Trove of Customer Data

Simply put, **user and event data** is user profile information found in any modern email service provider (ESP) or growth marketing platform. A user's profile is their single source of truth for two main components:

1. **User attributes** (demographic information and personal characteristics)
2. **Event data** (actions, behaviors and engagement with messaging)

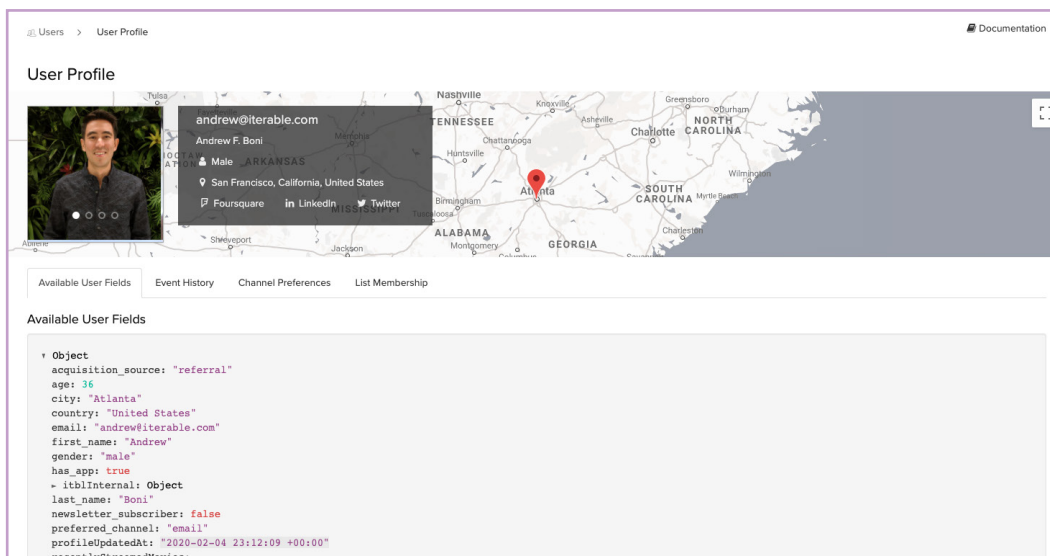
Together, these components give you a wealth of customer data at your fingertips—let's break each of them down into further detail.

### User Attributes: An Introduction To Your Customers

User attributes define who your customers are. Basic details—such as their contact information, geographic location, preferred communication channels, how and when they joined your website or app, and the devices they use—are all personal characteristics that shape their identities.

Attributes give you a holistic view of your customers, and they serve as a great starting point for dynamic personalization and segmentation. However, user attributes are less frequently updated than other data types (it's not like most folks move or change phone numbers every month), so they alone can't offer you a more nuanced understanding of your customers.

This is where event data comes into play.



*A standard user profile holds basic basic information about your customer, such as their email address and how they signed up for your communications.*

## Event Data: All About the Behavior

Event data is activity-based information about your customers. Tied closely to [behavioral targeting](#), they tell a story about how your users interact with your brand, greatly enhancing your understanding of their changing interests and preferences over time.

With event data, you get a multidimensional view of your customers' behavior—ranging from broad to granular—throughout their journey.

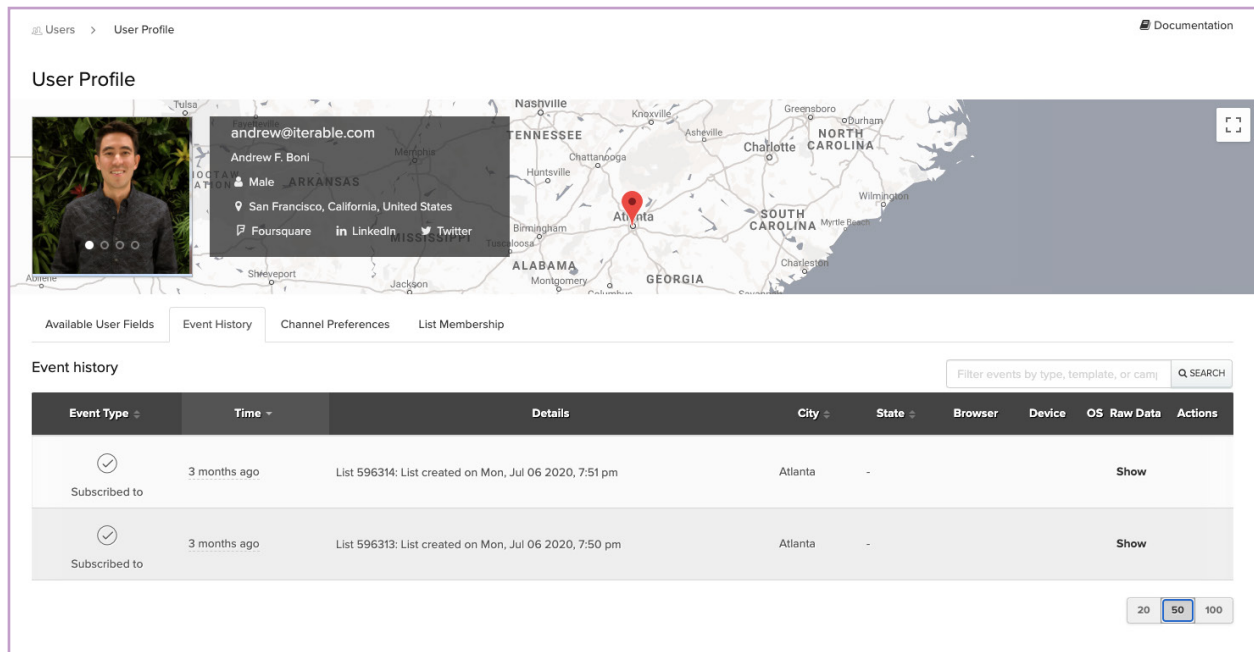
Let's say, for example, that you're the owner of an e-commerce site. On a broad level, you would track message engagement events, such as email open and click-through rates, push open rates, and SMS response rates to determine which channels appeal to which customers the most.

If you wanted a more detailed perspective of their behavior, you would track external action-oriented events, such as items added to cart or purchased.

By understanding your customers' actions and behaviors, you can anticipate their needs over time. In turn, this allows you to create more targeted and precise campaigns.

Now that you know what user and event data entails, let's discuss how you can use this data throughout the five foundational stages of marketing automation:

1. Audience identification
2. Data integration
3. Campaign composition
4. Message personalization
5. Performance optimization



The screenshot displays a user profile for 'andrew@iterable.com' (Andrew F. Boni) with a map background. Below the profile, there are tabs for 'Available User Fields', 'Event History', 'Channel Preferences', and 'List Membership'. The 'Event History' tab is active, showing a table of events. The table has columns for Event Type, Time, Details, City, State, Browser, Device, OS, Raw Data, and Actions. Two events are listed, both 'Subscribed to' events from 3 months ago, occurring on July 06, 2020, at 7:51 pm and 7:50 pm in Atlanta. A search bar and pagination controls (20, 50, 100) are also visible.

Event Type	Time	Details	City	State	Browser	Device	OS	Raw Data	Actions
Subscribed to	3 months ago	List 596314: List created on Mon, Jul 06 2020, 7:51 pm	Atlanta	-					Show
Subscribed to	3 months ago	List 596313: List created on Mon, Jul 06 2020, 7:50 pm	Atlanta	-					Show

*Your customer's event data is a chronological framework for their online activities and behavior.*

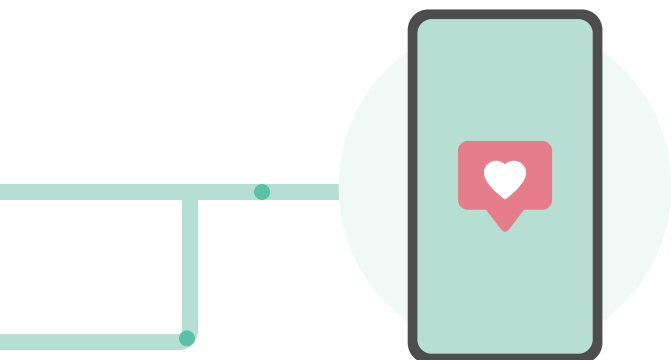
# Stage One: Audience Identification

Knowing your target audience is the most critical step in the campaign building process. Whether you're creating a new email marketing campaign or revamping an existing one, you must understand who your customers are. Without a firm grasp of who you want to reach out to, your message will be unlikely to engage the right people at the right time.

A good place to start is by studying your loyalists' [user profiles](#) where you'll get a 360-degree view of their data in real time. As you go through layers of information, ask yourself the following questions:

1. What do they do?
2. What do they like?
3. How do they interact with the brand?
4. How can you convert more customers to act like them?

Once you nail down your ideal audience, create a [dynamic list](#) so you can send a message that resonates.

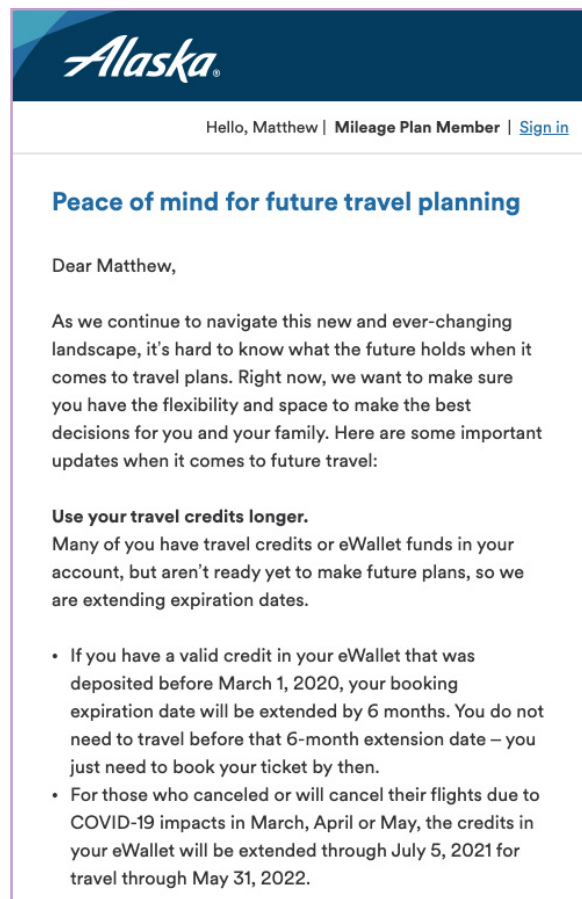


## Inside Look: Alaska Airlines

**Target Audience:** Travelers with account credits

**Situation:** The travel industry has been one of the hardest hit industries in the wake of COVID-19. During these uncertain times, people were forced to cancel or delay their plans until it's relatively safe to travel again. For those with travel credits, their main concern was whether they could redeem their credits toward future bookings.

**Solution:** Alaska Airlines does a fantastic job of demonstrating compassion, flexibility and relevance in this email message. The body of the email explains how the airline is extending expiration dates, further reassuring those with account credits that they can safely rebook flights through 2022.





## Inside Look: Spotify

**Target Audience:** Group of listeners that are considered the artist's top fans.

**Situation:** There's something to be said for getting the intel on the latest news about your favorite artist before everyone else. Spotify's data shows which listeners are considered the artist's top fans. With this information, the music streaming service can send an email campaign expressing gratitude for their listenership.

**Solution:** This thank you email does a great job of not only making the fans feel special, but it also highlights the value of exclusive merch. The offer code for this shirt/ticket bundle incentivizes fans to buy before the deal expires.



**FANS FIRST**

**A message from All Time Low:**

*This year we were supposed to be on the road playing these songs with you guys every night. We're doing the next best thing and playing Wake Up Sunshine all the way through for the first time with a livestream on October 9th. We wanted to offer something special to our Spotify listeners so grab your exclusive shirt/ticket bundle and we'll see you at the show!*

Use to the code **ATLFIRSTACCESS** and receive access to an exclusive t-shirt only for Spotify fans. Offer ends October 6th or while supplies last.

**BUY TICKETS & MERCH**

### Mini Assignment

- Find out where your team stores data.** Learn how the data is structured. After all, if you don't know where things are, how can you begin the process of building a personalized campaign?
- Get a panoramic view of your data.** The amount of information at hand can be overwhelming at first. But the more you familiarize yourself with it, the faster and easier it will be to find what you're looking for.
- Filter out the most important details** and apply that to your campaign.



So far, you've seen a couple of examples of brands that understand their target audience. You've also done your homework (hopefully!) and figured out who you want to reach out to. It's time to take that knowledge into the next stage: data integration.

## Stage Two: Data Integration

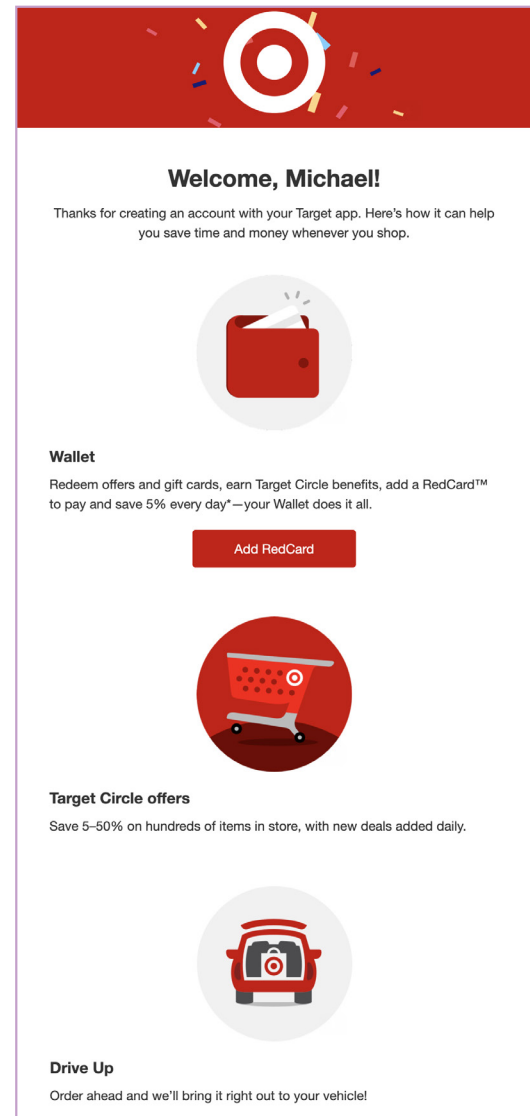
In this stage, it's all about context. You know who your customers are, but do you know where they're hanging out in the digital realm? Take stock of the arsenal of data at your fingertips to understand the big picture first. Determine which app or channel data you can glean from, and incorporate your findings in your campaign.

### Inside Look: Target

**Target Audience:** Customers who created new accounts via the mobile app.

**Situation:** Target understands the importance of context when connecting with new customers, whether their first touchpoint is creating a desktop account, downloading the app or making a first purchase. The retailer takes this context into consideration in its welcome campaign, with dynamic content based on signup source.

**Solution:** Target sends a warm [welcome message](#) that focuses on the app experience for mobile-first users. The email [onboards](#) the customer by explaining how they can save time and money on the go, namely through its CTA that promotes the Wallet feature in the Target app. Overall, the message does a great job of illustrating convenience and cost savings to new subscribers.



### Mini Assignment

- Brainstorm a list of signup sources** and other user touchpoints that are critical to the customer journey (e.g. website, app, social media).
- Choose one source** you want to incorporate into your campaigns. Focus your attention there.
- Build out dynamic content modules** based on that added source to personalize messages by context.



Give yourself a pat on the back! So far, you've identified your target audience and integrated key data sources to improve the relevancy of your content. The next stage is to put the pieces together to create an unforgettable cross-channel experience for your customers.



## Stage Three: Campaign Composition

In the third stage, it's all about composing an amazing cross-channel campaign for your customers. But before you start designing email templates, here are just a few questions you should ask yourself first:

1. What are the enter and exit criteria for your campaign?
2. How many touchpoints are needed and what are their CTAs?
3. Which channels will you use to communicate at these touchpoints?
4. How long will you delay between each message?
5. How will you filter users through each step of the workflow?

If you send an email at the wrong time or via the wrong channel, you miss the opportunity to connect with your customers. And if you send messages too often, you run the risk of them developing fatigue and dropping your brand altogether (yikes!).

As a marketer, you're responsible for striking the right balance between too little and too much, and find them where they're most active and responsive. Plan first, then act accordingly.

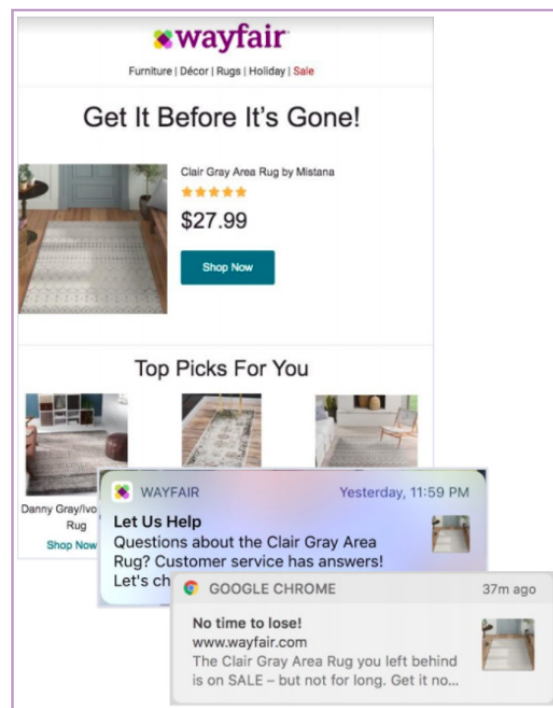


### Inside Look: Wayfair

**Target Audience:** A customer who added an item to the shopping cart but didn't complete the purchase.

**Situation:** It's common for shoppers to browse and add items to the cart with no intention of buying anything. The average cart abandonment rate is 81%, so online retailers need to work hard to overcome this obstacle and encourage their customers to complete the transaction.

**Solution:** Wayfair sends cross-channel notifications to invite the customer back to the website and complete the purchase. These messages are cohesive across the channels (email, mobile push, web push), ensuring a seamless experience for the customer. The messaging increases urgency over time, while the image of the rug keeps the item top of mind.

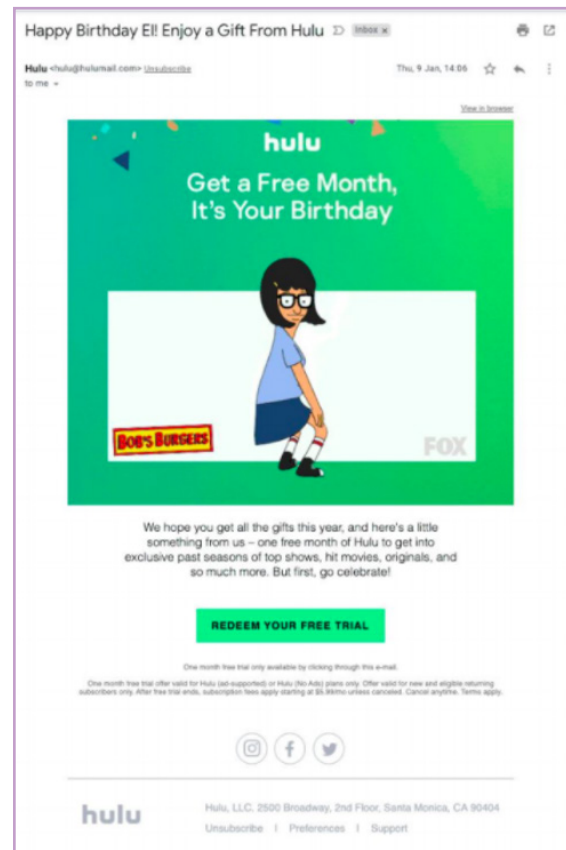


## Inside Look: Hulu

**Target Audience:** New or eligible returning subscribers who haven't completed their free trial.

**Situation:** Hulu customers are able to sign up for a 30-day free trial before paying a monthly subscription fee for their streaming services. But those who have yet to redeem their offer could use a fun and friendly message to remind them of what they're missing out on.

**Solution:** Hulu knows that a little humor goes a long way in capturing the reader's attention. This birthday email campaign uses an animated GIF of a popular character in one of their top shows (Tina Belcher from "Bob's Burgers") to inject a little fun. In acknowledgement of the recipient's birthday, Hulu offers a free one-month trial as a gift.



### Mini Assignment

- Gather your favorite and top-performing campaigns.**  
Pick the top 10 as a starting point.
- Look for trends and patterns in the elements,** themes and features. Do you notice anything that stands out?
- Pick the standout element** and incorporate it into your next campaign.



Let's do a quick recap. You've identified your target audience, chose the right messaging channels, and drew inspiration from your top-performing campaigns. By now, you have enough materials to start personalizing messages that speak to your audience.

## Stage Four: Message Personalization

In this pivotal stage, you have the chance to appeal to your customers by providing them with personalized messages while reinforcing your brand value.

In a survey, 72% of consumers say they will only engage with marketing that is personalized. When it comes to tailoring messages for your customers, be sure to make them feel wanted, remembered, valued and connected.



of consumers say they will only engage with marketing that is personalized.

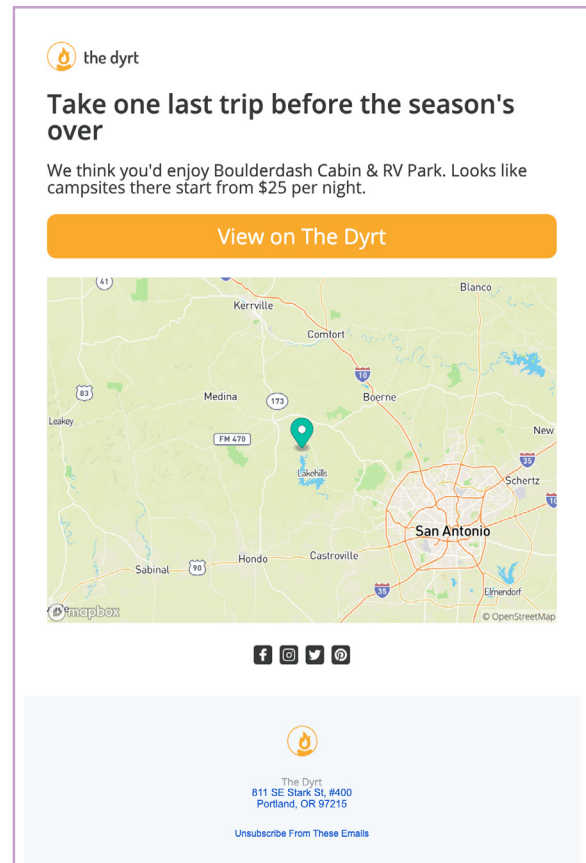


### Inside Look: The Dyrft

**Target Audience:** Campers interested in taking one last trip before camping season ends.

**Situation:** Powered by Iterable, The Dyrft is the highest-ranked camping app that recommends campgrounds based on the user's desired geographic location, price and camping preferences.

**Solution:** The Dyrft creates this highly personalized campsite recommendation based on user attributes: first name in the subject line ("Consider one last trip, James"), city (San Antonio), and price (starting from \$25 per night). The image of the map displaying the campground's location makes the message more compelling and incites the user to take action by clicking the CTA.

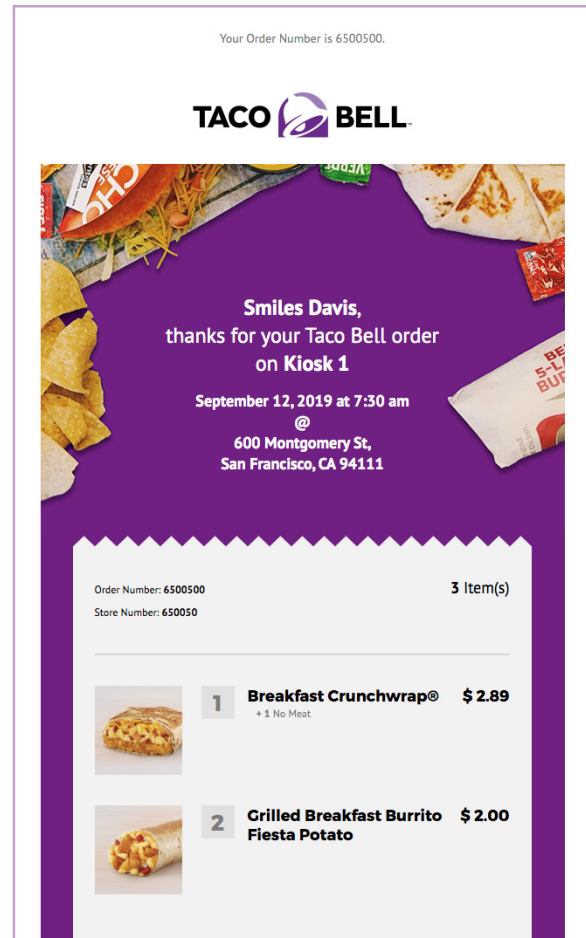
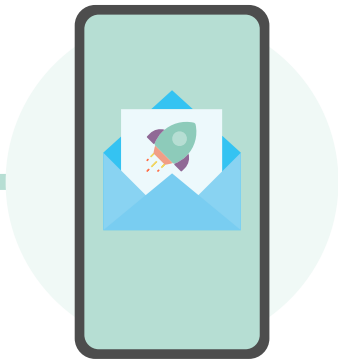


## Inside Look: Taco Bell

**Target Audience:** A customer who places a take-out order.

**Situation:** Taco Bell's customer base is often on the go, so it's important that the fast food chain makes it just as easy and engaging to order food in advance via desktop and mobile as it is to order in-person.

**Solution:** Transactional messaging doesn't have to be bland and boring, as Taco Bell proves in its reimagining of the receipt, which evokes the feeling of being at the restaurant. The CTA makes it easy to track an order, and the option to favorite the items gives customers a frictionless experience and the brand the ability to offer personalized recommendations in the future.



Source: Really Good Emails

### Mini Assignment

- Choose **five** of your recent emails at random.
- Talk to **your teammates**. Brainstorm which elements did exceptionally well.
- Make **key changes** to your next email based on your group's consensus.



Creating and launching a campaign is the fun part. But the real work begins after you press that 'send' button, and the results start rolling in. Now it's time for you to evaluate the performance and see where things went right (and wrong).

## Stage Five: Performance Optimization

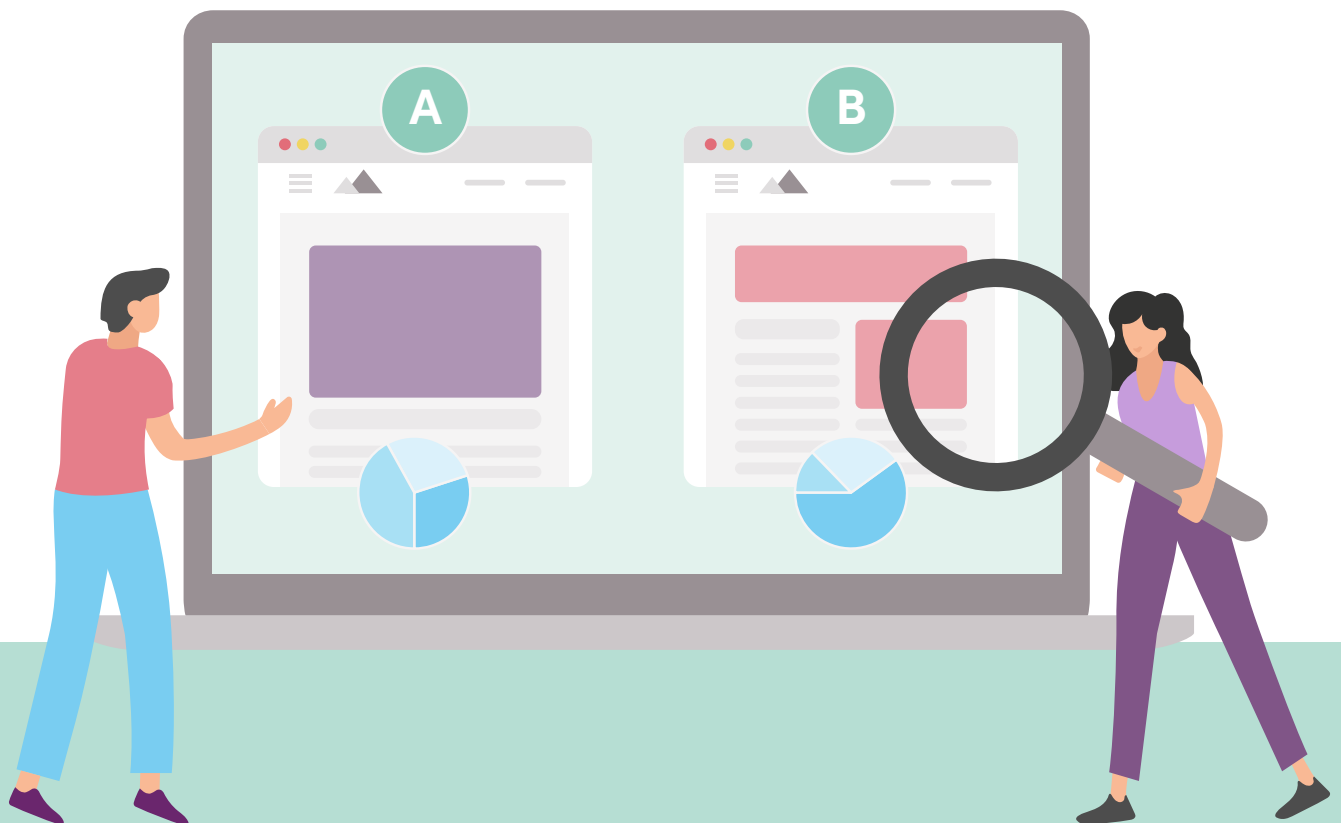
The final stage of campaign building is analyzing performance results. What did you learn? Did the outcome meet your expectations? If not, what can you do to improve your future campaigns?

Refer to previous user engagement data to gauge the effectiveness of your current campaign.

Chances are, you'll notice varying degrees of success across the channels.

Conducting A/B tests and multivariate experiments to determine which elements resonate the most with your customers. A modern growth marketing platform will be able to put performance improvements on autopilot by using AI technology to optimize by send time, frequency and channel.

You can only get better by learning from your past wins and losses, so keep iterating until you achieve your business goals.



The success of your cross-channel campaigns hinges on your ability to access and activate your customers' user and event data and turn them into highly personalized experiences.

With the knowledge you've gained, go forth and start building a campaign that delights and engages your customers throughout their unique journeys.



# Level 2: Proactive Personalization With Data Feeds

## Data Feeds 101: An Introduction

### What Is a Data Feed?

A data feed is a way of sending structured and up-to-date information from one source to another. It's a form of data exchange that imports external data, which you can incorporate into your messaging templates.

Data feeds supplement your customers' user profile data so that you can create more sophisticated personalization.

So, what are data feeds?

Data feeds are non-user information that is:

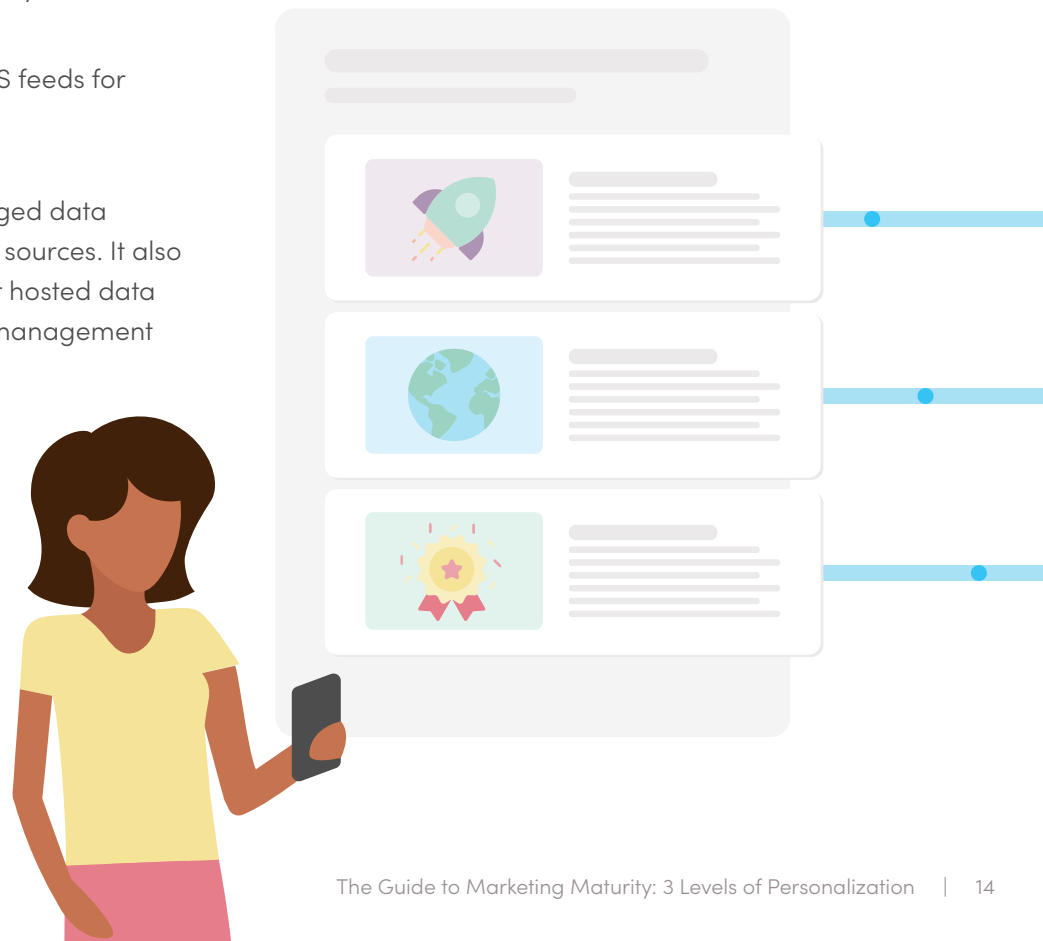
1. Externally managed outside of your email service provider (ESP)
2. Updated frequently (think RSS feeds for blogs and podcasts)

Bear in mind that externally managed data doesn't just come from third-party sources. It also comes from internally managed or hosted data stored in your company's content management system or data warehouse.

### Why Are Data Feeds Essential?

As we mentioned earlier, user profile data is just one aspect of personalization. If you don't look beyond user attributes and event data, your messages may grow stale and irrelevant to your customers over time.

However, with data feeds, you have the flexibility (and efficiency) to deliver unique messages at scale. This means you can work smarter, as you have a repeatable framework for creating and executing personalized campaigns that continue to wow your customers.



## What Are the Most Common Data Feed Formats?

As email service providers and growth marketing platforms like Iterable send campaigns, data feeds can make per-recipient requests to external sources. Parameters in these requests make it possible to return data that's directly relevant to specific users.

Iterable data feeds can query JSON, XML, RSS and Atom web services in order to customize and personalize the content you send out in your messages.

Websites typically use these formats to publish frequently updated information, such as blog entries, social media posts, news headlines or podcasts.

```
{
  "pastPurchase": "Hot Dog Halloween Outfit for Cats",
  "suggestedProduct": [
    {
      "name": "Deluxe Cat Tree",
      "description": "A jungle for your favorite feline buddy",
      "price": 160,
      "imageUrl": "http://img-cache.cdn.gaiaonline.com/0b4be3af7262e023cce39cffa697d4cd/http:"
    },
    {
      "name": "Catnip Mouse Toy",
      "description": "Cats go absolutely crazy for this realistic mouse toy!",
      "price": 4,
      "imageUrl": "http://www.crystalclearpet.com/shop/treats/images/catnip-large-mouse-11077"
    },
    {
      "name": "Set of 3 Furry Sticks",
      "description": "Dangle this enticing toy in front of your kitty!",
      "price": 5,
      "imageUrl": "http://i01.i.aliimg.com/wsphoto/v1/1944996867/Freeshipping-font-b-Rabbit-b"
    }
  ]
}
```

*For example, a JSON web service might return the following product recommendations based on a user's purchase history.*



# What Are Some Examples of Data Feeds in Action?

While data feeds can be used to personalize your content with dynamically updated information at send time, generally speaking, there are four common use cases in which you can put data feeds into action in your marketing campaigns.

1. Active offers
2. Recommendations
3. Tickers and APIs
4. Blog and news content

The email examples from the following industry-leading brands demonstrate how data feeds can help you achieve proactive personalization.

Let's check out the active offers first.

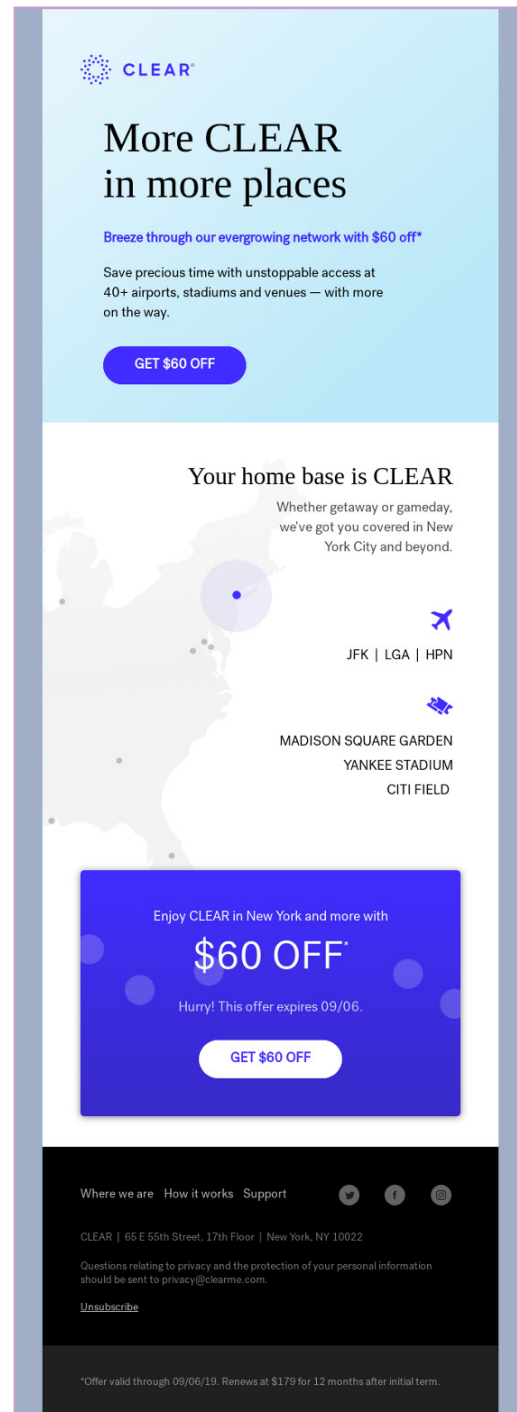
## 1. Active Offers

### Inside Look: CLEAR

CLEAR, a biometric security identity platform that allows members to bypass travel security checkpoints, offers time-saving access to 40+ airports, stadiums and venues in the U.S.

**Campaign Appeal:** Right away, the reader knows the message pertains to an active offer. The email copy and CTA buttons clearly state what they can expect: \$60 off their first year of membership.

**Data Feeds in Action:** CLEAR personalizes each offer by location with a data feed that inserts a map and details about local airports and venues. In this example, the user's "home base" is New York City, so the information displayed promotes landmarks, like JFK Airport, Madison Square Garden and Yankee Stadium.



CLEAR entices their reader with \$60 off their subscription. Source: [Really Good Emails](#)

## Inside Look: SeatGeek

SeatGeek is a mobile-focused ticket platform that allows fans to buy and sell tickets for concerts and sporting events. They carry the largest inventory of live event tickets on the web, and they rely on Iterable's robust and agile platform to deliver personalized experiences at scale—which increased their revenue by 3x.

**Campaign Appeal:** The message is relevant to each customer's location and interests—in this case, a Jaguars fan based in Jacksonville, Florida. Home game tickets are on sale if they apply a \$300 promo code. The full home game schedule and the ticket links make it easy for the user to plan, further incentivizing them to purchase a ticket.

**Data Feeds in Action:** SeatGeek builds a data feed to pull upcoming home games based on the user's location and adds it to their campaign template, both chronologically in the full schedule and in the featured event section at the top.

The screenshot shows a mobile app notification from SeatGeek. At the top, a small green banner reads: "The NFL is taking extra precautions to keep fans safe at games this season." Below this is the SeatGeek logo. The main headline in large white text on a dark teal background says: "Jacksonville Jaguars tickets are back on sale". Below the headline is a white card featuring a featured event: "Houston Texans at Jacksonville Jaguars" on "Sun, Nov 8 • TIAA Bank Field", with a blue "Find tickets" button to the right. Underneath the card, white text on the teal background reads: "Let's try this again, shall we? Tickets to Jaguars games are back on sale and available now. Use your \$300 promo code on an upcoming home game." The bottom section, titled "Full home schedule", lists four home games with their dates and locations, each accompanied by a blue "Find tickets" button: "Indianapolis Colts at Jacksonville Jaguars" (Sun, Sep 13, TIAA Bank Field • Jacksonville, FL), "Miami Dolphins at Jacksonville Jaguars" (Thu, Sep 24, TIAA Bank Field • Jacksonville, FL), "Detroit Lions at Jacksonville Jaguars" (Sun, Oct 18, TIAA Bank Field • Jacksonville, FL), and "Houston Texans at Jacksonville Jaguars" (Sun, Nov 8, TIAA Bank Field • Jacksonville, FL).

*SeatGeek engages its customers by keeping them informed of local events.*

You've seen some cool examples of active offers and how they can entice your customers. Next, let's take a look at some companies that offer hand-picked products and services to their respective customers.

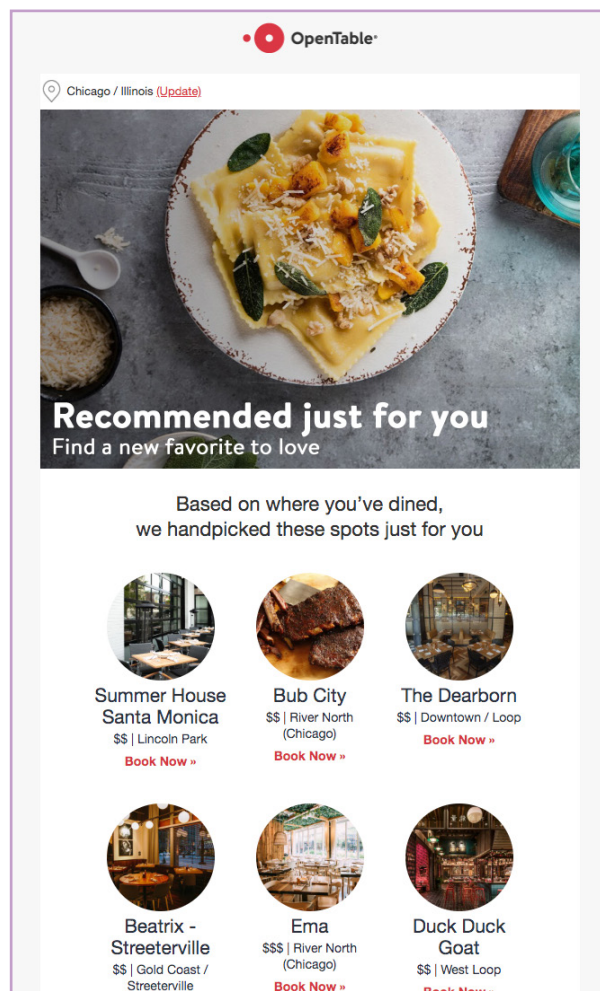
## 2. Recommendations

### Inside Look: OpenTable

OpenTable is an online restaurant reservation platform. Since its inception in 1998, it has helped diners discover new restaurants and accumulate reward points towards travel and dining experiences.

**Campaign Appeal:** The image of the savory ravioli dish grabs the reader's attention (who doesn't like a good pasta dish?). And the list of the recommended restaurants with critical details (location, rating, and price range) make the suggestions more compelling, as the reader doesn't have to spend too much time researching each one.

**Data Feeds in Action:** OpenTable uses a data feed to pull a list of local restaurants similar to the ones where the customer has dined before. And if the customer no longer lives in Chicago, they're given the option to update their location in the header.



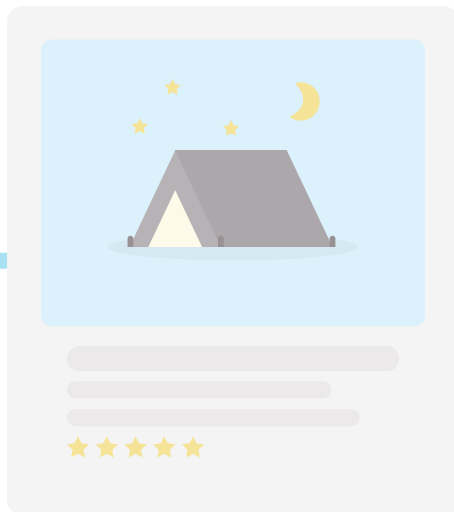
*OpenTable knows how to serve great recommendations. Source: [Really Good Emails](#)*

## Inside Look: Airbnb

Airbnb is an online marketplace that connects hosts and travelers from all over the world. It allows people to rent their properties or spare rooms to out-of-town guests looking for alternatives to pricier hotel rooms.

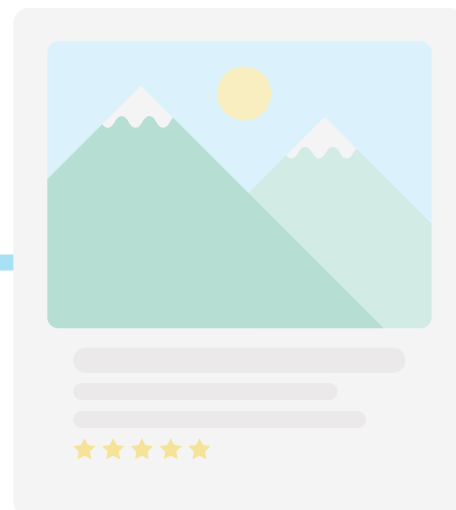
**Campaign Appeal:** In this example, Airbnb sends a welcome message to a user who has just booked a trip to Berkeley, Calif. A day-by-day itinerary allows the customer to spend less time planning and more time exploring.

**Data Feeds in Action:** Airbnb uses a data feed to pull a curated list of the most highly rated tourist attractions in the surrounding Bay Area, including important information, like the time of each experience, the distance from the booking location and the number of reviews.



An example of an Airbnb welcome email for Berkeley, CA. The email features the Airbnb logo at the top, followed by the text "WELCOME TO BERKELEY". Below this, a paragraph reads: "Not sure how to spend your time in Berkeley? We've created a day-by-day itinerary just for you. So you can spend less time planning and more time exploring." A large photograph of the Golden Gate Bridge in San Francisco is shown. Below the photo, the date "Jun 20" is displayed next to the heading "Wednesday". The text says: "Your first full day of exploration! You won't want to miss the landmarks, but you can make those visits even more special with a local as your guide." Two activity cards are shown: "San Francisco Victorians" (11:00 AM - 1:30 PM, 10.0 miles away, 5 stars, 252 reviews) and "Chinatown Walking Tour" (10:00 AM - 12:00 PM, 9.9 miles away, 5 stars, 21 reviews). Each card includes a small image of the activity.

*Airbnb sends a welcome email with a fun-filled agenda. Source: [Really Good Emails](#)*



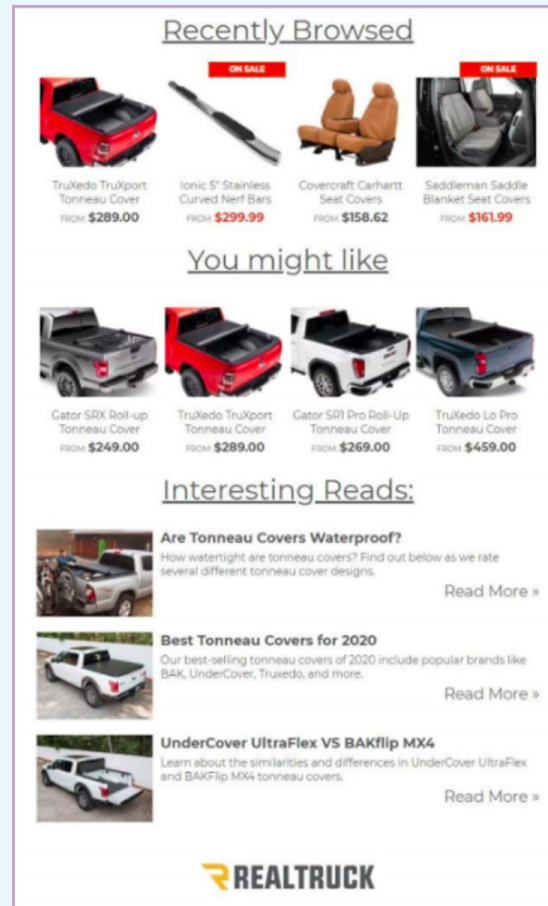
## Iterable Case Study: RealTruck

RealTruck is a leading e-commerce retailer of pickup truck accessories. The company provides an immersive and engaging experience for truck enthusiasts through expert advice and comprehensive information on every product it sells.

**Campaign Appeal:** This pre-purchase email campaign exhibits products and suggested blog posts into three dynamic content modules: Recently Browsed, You might like, and Interesting Reads. The recommendations are relevant to each user's browsing behavior, and the blog articles help address any customer questions or concerns.

**Data Feeds in Action:** RealTruck uses a data feed to populate each content module with product recommendations and blog posts that resonate with every customer on an individual level.

**Results:** Using Iterable's growth marketing platform to power their email marketing, the RealTruck team achieved a 4.71% increase in click-through rate and a 0.61% increase in conversion rate compared to the static content in previous batch sends.



*RealTruck draws the reader in with recommended products and reads.*

There's no doubt that recommended products and services offer tremendous value to your customers. Next, we'll look at how public data feeds, like stock tickers and weather APIs, can add more depth and relevance to your content.

**4.71%**

increase in  
click-through rate.

**0.61%**

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static content in previous  
batch sends.

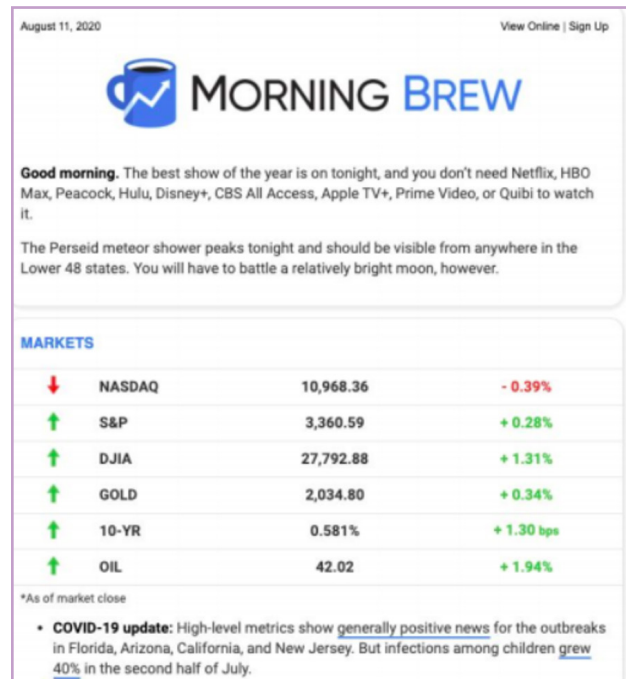
### 3. Tickers and APIs

#### Inside Look: Morning Brew


Morning Brew is a free daily email newsletter with over 1 million subscribers and an impressive 45% average open rate. It's designed for young business professionals, covering the latest news in business, finance, technology, politics and more.

**Campaign Appeal:** Each newsletter starts with the previous day's performance, which offers a high-level overview into various stock market indices and commodities. It's a great barometer to quickly assess the world's financial health and leads readers to the following news highlights.

**Data Feeds in Action:** The markets are in a constant state of volatility, which requires automation to leverage effectively in email campaigns. Morning Brew uses a public stock ticker to pull closing numbers from the previous day. This eliminates the need to manually recreate this information five times a week during trading hours.



August 11, 2020 View Online | Sign Up

 **MORNING BREW**

**Good morning.** The best show of the year is on tonight, and you don't need Netflix, HBO Max, Peacock, Hulu, Disney+, CBS All Access, Apple TV+, Prime Video, or Quibi to watch it.

The Perseid meteor shower peaks tonight and should be visible from anywhere in the Lower 48 states. You will have to battle a relatively bright moon, however.

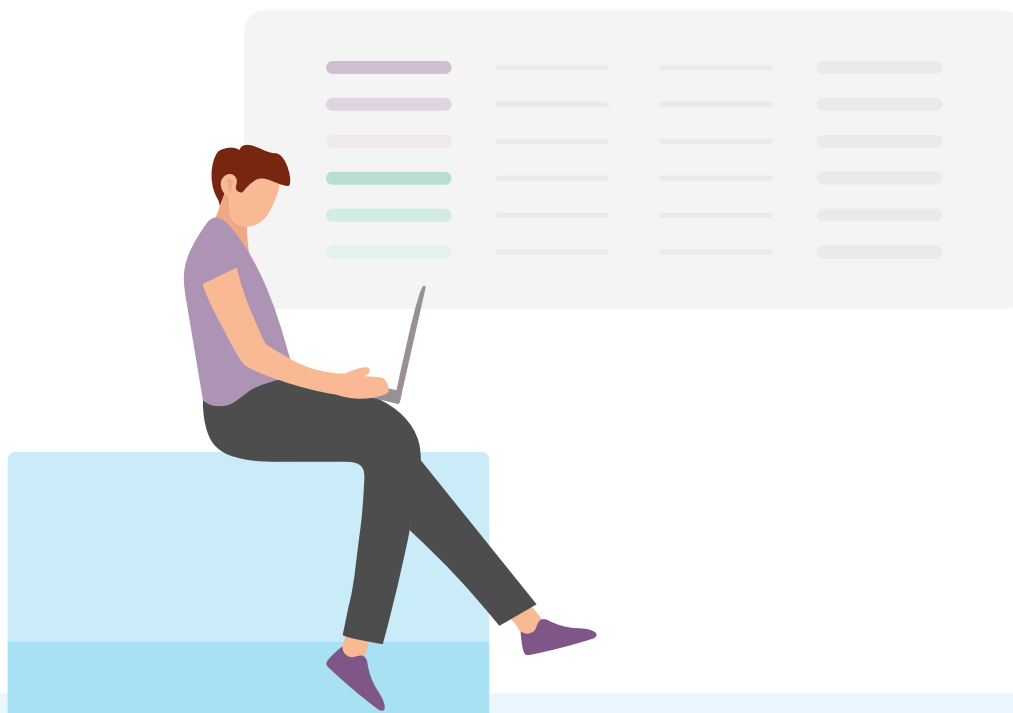
**MARKETS**

↓	NASDAQ	10,968.36	- 0.39%
↑	S&P	3,360.59	+ 0.28%
↑	DJIA	27,792.88	+ 1.31%
↑	GOLD	2,034.80	+ 0.34%
↑	10-YR	0.581%	+ 1.30 bps
↑	OIL	42.02	+ 1.94%

\*As of market close

- **COVID-19 update:** High-level metrics show generally positive news for the outbreaks in Florida, Arizona, California, and New Jersey. But infections among children grew 40% in the second half of July.

*Market performance is the focal point of Morning Brew's daily email newsletter.*



## Inside Look: Uniqlo

Uniqlo is a Japanese clothing company with over 1,000 stores globally. Their name derives from the words ‘unique’ and ‘clothing,’ and they’re known for their affordable, high-quality basics and outerwear.

**Campaign Appeal:** The local weather forecast, featuring Saint Paul, Minnesota, in this example, gives the reader an idea of what clothes from Uniqlo would best accommodate the fluctuating temperatures during the transition into spring.

**Data Feeds in Action:** Uniqlo understands that the weather determines their customers’ fashion choices, so the brand has imported a data feed from a public weather API to create a 7-day forecast that will help readers buy seasonally appropriate apparel.

The graphic is a vertical rectangular panel with a dark blue, cloudy sky background. At the top left, it says "Be prepared for what Mother Nature has in store: MEN | WOMEN" and at the top right, "View in a browser". The Uniqlo logo is centered at the top. Below it, the location "Saint Paul, Minnesota" is displayed. The date "03/07" is to the left of "TODAY 50°" which is accompanied by a sun icon. Below this is a 7-day forecast table:

SUN	MON	TUES	WED	THURS	FRI	SAT
47°	38°	33°	36°	40°	35°	35°
☁️	☁️	☁️	☀️	☀️	☀️	☁️

Below the table, the text "TRANSITIONAL WEATHER ESSENTIALS" is written in large, bold, white capital letters. Underneath, a smaller line of text reads: "Crazy weather got you down? Don't fret because we've got you covered in BLOCKTECH that keeps the rain out and Ultra Light Down that blocks wind." At the bottom, there are two white buttons with black text: "SHOP MEN" and "SHOP WOMEN".

*Uniqlo offers transitional weather essentials based on the local 7-day forecast. Source: [Really Good Emails](#)*

You’ve seen how tickers and APIs can power your campaigns with an extra dose of personalization. In the next and final section, we’ll talk about amplifying your messaging with a nearly universal resource used by businesses everywhere: blog and news content.

## 4. Blog and News Content

Media outlets and brands that run company blogs as part of their content marketing strategy face fierce competition. With over [600 million blogs](#) on the internet, businesses have to continuously work to attract and retain their target audience by regularly publishing new content.

As a marketer, you're aware that the content distribution process can be painstaking, if not downright tedious. But with RSS feeds, you can promote your blog or news site more frequently and efficiently, while delivering personalized content to your subscribers.

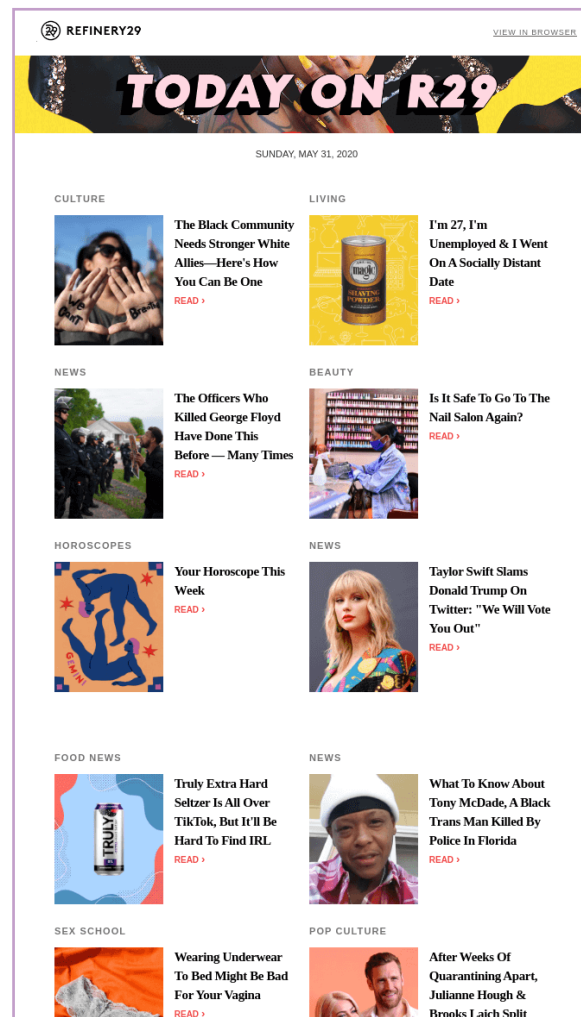
Bearing this in mind, let's take a quick look at media and entertainment sites and resource hubs that bring their A-game when it comes to supplying fresh, relevant content to their readers.

### Inside Look: Refinery29

Refinery29 is a media and entertainment company that aims to be the destination for the modern woman seeking a well-rounded life. The website includes a kaleidoscope of content on news, culture, entertainment, fashion, beauty, and more.

**Campaign Appeal:** R29, as they're otherwise known, offers over a dozen curated newsletters on a variety of topics, but its "Today on R29" delivers a sample of the day's best stories across all of its content categories.

**Data Feeds in Action:** A daily newsletter's objective is to surface the best-performing content to maximize engagement, so this data feed is likely serving up the most viewed post in each category. A cross-sell opportunity could be to promote the dedicated newsletter of the category that the reader clicks most often.



R29 highlights cultural and political affairs in its daily newsletter. Source: [Really Good Emails](#)

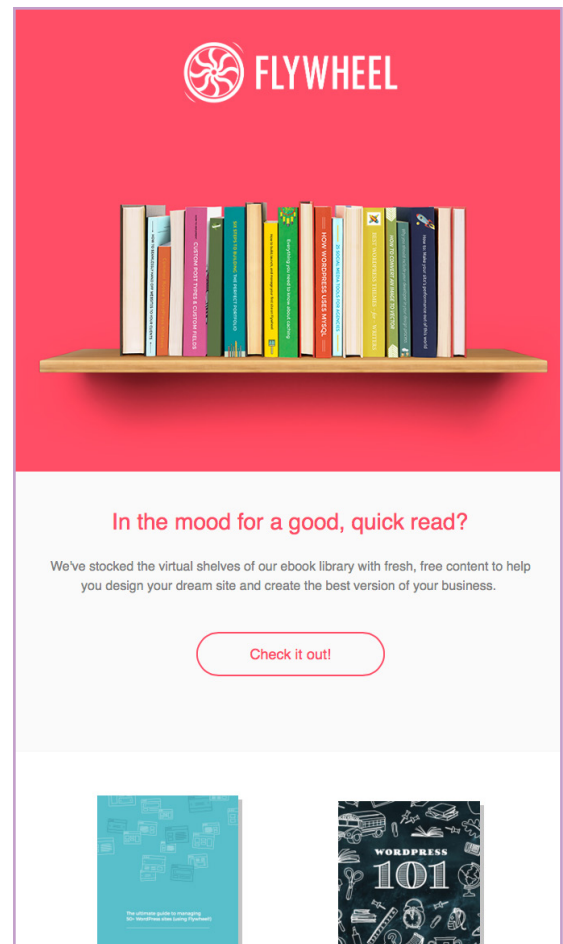


## Inside Look: Flywheel

Flywheel is a managed WordPress hosting platform for designers, web developers, agencies and other busy creatives. Its resources hub includes a blog and ebook library on topics about plugins and performance.

**Campaign Appeal:** This email promoting Flywheel's ebook library emphasizing content to help readers create the best version of their businesses. The message also highlights color psychology, as indicated by the vibrant featured image that connotes invigoration and high energy, prompting the reader to check out the suggested posts for a good, quick read.

**Data Feeds in Action:** A data feed used in an email like this can be used to return evergreen content that is most recent, most viewed or categorized on a specific topic—whichever you believe that readers would find valuable.



*Flywheel inspires its readers to check out its ebook library.*

Source: [Really Good Emails](#)

### Mini-Assignment

- Brainstorm the content types that would add the most value** to your marketing messages, whether they're your blog's RSS feed or a public weather API.
- Review your live campaigns and identify low-hanging fruit** that you can add, such as prices or customer ratings and reviews.
- Incorporate one new data feed into your email campaign** and compare its performance to the original version.

By now, you should have a firm grasp on how data feeds can supplement your customers' profile data to give your campaign that extra boost it needs.

Nourishing your campaigns with data feeds allows you to deepen your relationship with your customers and create more memorable experiences.

Whether you run a news outlet, an online marketplace or an e-commerce shop, data feeds can help level up your personalization game.



# Level 3: Individualization With Metadata

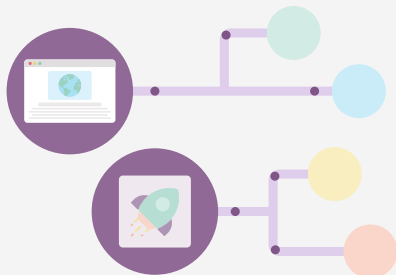
## What Is Metadata?

Metadata is data about data. Hailing from data management and e-commerce platforms, it's descriptive data about products and services that make your brand stand out from your competitors.

The details of your brand offerings are like fingerprints; no two are identical, just like your customers' preferences. With metadata, you can gain customer-specific insights and create individualized experiences that deliver even more value to your audience.

For instance, let's say you're the owner of an automotive company. You're not selling just cars; you're selling various makes and models, colors, accessories, and price points. When a prospective buyer visits your website, they see a display of the cars' metadata from which they can sort and filter, choose and customize.

### How Does Metadata Differ From Data Feeds?



**Data feeds** are mechanisms to receive real-time information from externally managed websites and apps.



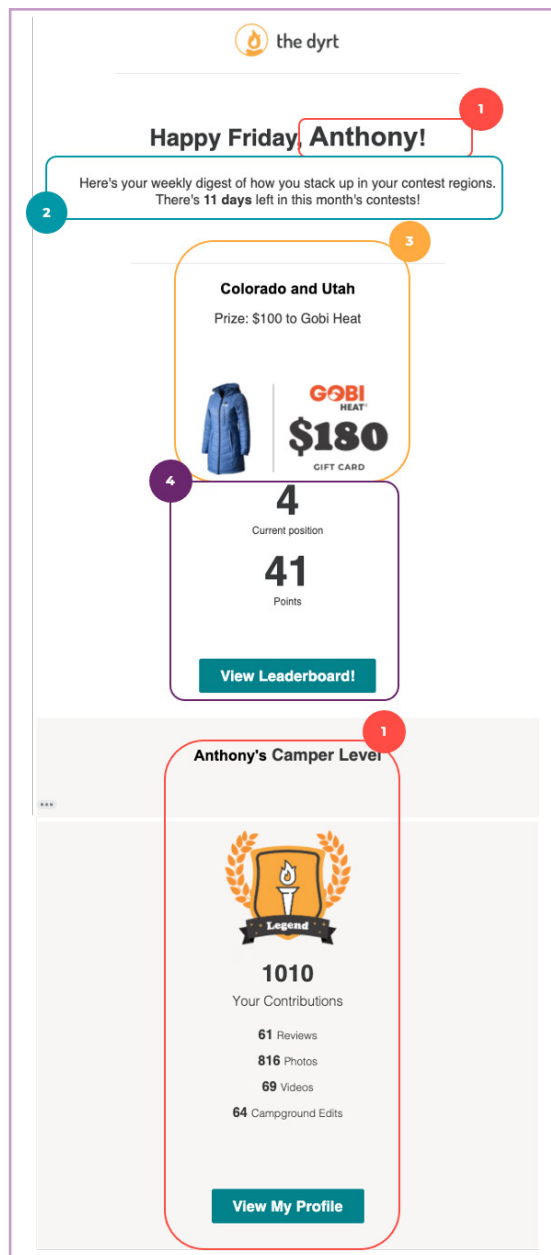
**Metadata**, on the other hand, is descriptive information about your brand's product or service offerings.

Both can be used to personalize marketing messages at the moment of send.



For further illustration on metadata (and a quick refresher on the other data types) let's breakdown this [gamified](#) email campaign by [The Dyrft](#).

This email campaign is a weekly digest that shows users how they stack up in regional monthly contests. Let's walk through each of the elements in this message and the data types that drive them:



Can you identify the different data types in this email?

- 1. User data:** These sections, both in the headline and at the bottom, includes information that's specific to Anthony. His first name, camper levels, badges, reviews, pictures, and contribution counts are the baseline details that allow you to personalize according to his user profile.
- 2. Data feeds:** The contest is information that is independent of Anthony's profile and the countdown to its end date dynamically changes as each day passes, so it's populated with a data feed.
- 3. Metadata:** In this example, the contest is the product being offered, and it has metadata associated with it, such as the region it supports and the prize descriptions and images (in this case, a \$180 jacket).
- 4. Data feeds:** The leaderboard standings and points aren't associated with a single user profile; so this aggregate, dynamically changing data must be brought in with a data feed.

It's common for brands to run contests in order to incite customer engagement, and metadata is at the heart of providing a [great customer experience](#).

With that, it's time to check out how other B2C companies wield metadata to create individualized campaigns for their respective audiences.



# Metadata Campaign Types

There are countless types of campaigns in which you can leverage metadata to provide individualized experiences throughout the customer lifecycle. Here are several of the most common use cases you are likely to come across.

## Cart Abandonment

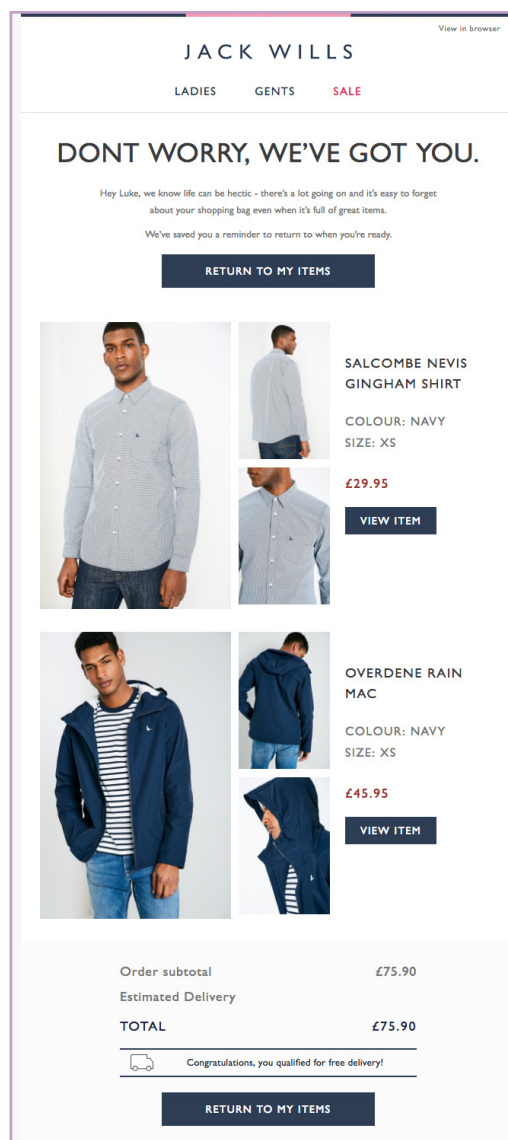
Cart abandonment can happen for many reasons. Perhaps a customer didn't like the items enough to make a purchase. Or maybe they got distracted during the checkout process. No matter what the reason is, cart abandonment is the bane of existence for e-commerce marketers.

The good news is incorporating product metadata into your cart abandonment messages can create a boomerang effect for customers.

### Inside Look: Jack Wills

**About Jack Wills:** Jack Wills is a British fashion and lifestyle brand founded in 1999. The company describes its signature style as epitomizing a *"carefree, youthful spirit."*

**Metadata in Action:** This cart abandonment email starts with a reassuring subject line, followed by a complimentary message that gently reminds the customer that they can return to the website at their convenience. Each item is clickable, and the metadata (product images, names, colors, sizes and prices) serve as visual reminders of what they had previously browsed. The action-oriented CTA and the free delivery note further incentivize the customer to purchase the items left behind.



Source: [Really Good Emails](#)

Post-purchase, it's time to evaluate your customers' satisfaction by asking them to fill out a survey or write a review. As the expression goes, ask and you shall receive.

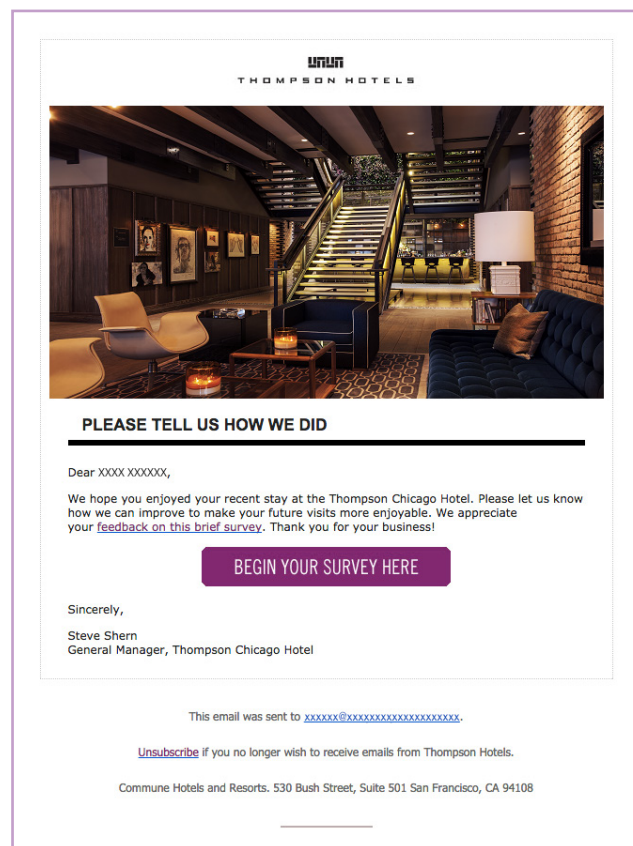
## Review Requests

Review requests (or [feedback requests](#)) help you gauge how your products or services fared. Not only are they invaluable to your brand's success, but they also help you discover new customer insights that could add more relevance to individualized campaigns.

### Inside Look: Thompson Hotels

**About Thompson Hotels:** Founded in 2001 and acquired by Hyatt in 2018, Thompson Hotels is a luxury hotel group with urban and resort locations throughout the U.S. and Mexico. They're known for providing guests with tailored experiences through world-class dining and arts and entertainment.

**Metadata in Action:** At first glance, this email looks like a standard post-visit survey. But upon closer look, the telltale signs of metadata are there: the location where the guest stayed, the image of the hotel's lobby and the general manager's name. The details may be subtle, but they create a powerful, relevant message that's anything but generic.



Source: [Really Good Emails](#)

Next, we'll look at other post-purchase campaigns that present opportunities to promote other services and create an environment that's conducive to further engagement.

# Transactional Confirmations

It's standard practice to send confirmation emails after a customer performs an action, such as subscribing to a weekly newsletter or placing an order on your website. Essentially, these emails are online receipts, but adding personalization with product metadata can help boost customer engagement and generate more revenue for your brand.

## Inside Look: Etsy

**About Etsy:** Founded in 2005, Etsy is an online global marketplace for handmade and vintage goods with over 60 million items available from its community of nearly 3 million sellers.

**Metadata in Action:** The information hierarchy of this email provides a lot of value to the reader. For starters, the order status is indicated by the timeline, which is a great way to set delivery expectations. Below the status, the item details (name, image, quantity, color, and price) are laid out, along with shipping and payment information. At the bottom of the message, the customer can initiate a conversation with the seller and foster a 1:1 connection.



The screenshot shows an Etsy order confirmation email. At the top, it says "Etsy" and lists navigation links: Home & Living, Jewelry, Accessories, Clothing, Weddings, Craft Supplies. The main heading is "Woohoo! Your order is confirmed." followed by "TheHeartDepartmentCo will start working on this right away. We'll email you as soon as it ships." Below this is a progress timeline with three stages: "Ordered on Feb 17" (checked), "Ready to ship", and "Expected delivery Feb 22 - 26". A "View your order" button is present. A note states: "Delivery times are estimated. If you're experiencing difficulty with this order, please contact the seller. See more info." The "Order details" section includes a confirmation number (6500600) and a product listing for "MOON PRINT HOLDER | Kale.gre..." priced at \$16.85. It also lists transaction ID, quantity (1), and color (TERRACOTTA). The shipping address is Smiles Davis, 600 Montgomery St, San Francisco, CA 94111, United States. Payment is via Credit card. A summary table shows Subtotal (\$16.85), Sales tax (\$1.50), and Shipping (\$8.12), totaling \$26.47 for 1 item. A note at the bottom says "Etsy offsets carbon emissions from every delivery". The "Shop Information" section features the seller "Tanalee" (TheHeartDepartmentCo, Northern, Kentucky) with a 5-star rating and a "Help with order" button. A message from the seller says: "Hello there! Thanks so much for your business! I'll get started on your order right away. When I ship your order, I'll send you an auto-generated notification email. The transit time will vary based on the method of shipping you chose. In the meantime, if any questions, come up, please do not hesitate to message me! I'm always happy to chat." The seller's name and shop name are listed at the bottom.

Source: [Really Good Emails](#)

Now, what happens if an item your customer is interested in is out of stock? You can keep them informed about any updates on your inventory with a back-in-stock campaign.

## Back-in-Stock Alerts

Back-in-stock campaigns aren't as commonly used as the previous campaigns we've discussed, but like cart abandonment reminders, these alerts are powerful because they're direct opportunities for revenue. Additionally, these campaigns are especially beneficial around the holidays when [product scarcity](#) (and FOMO) is real.

### Inside Look: Public Rec

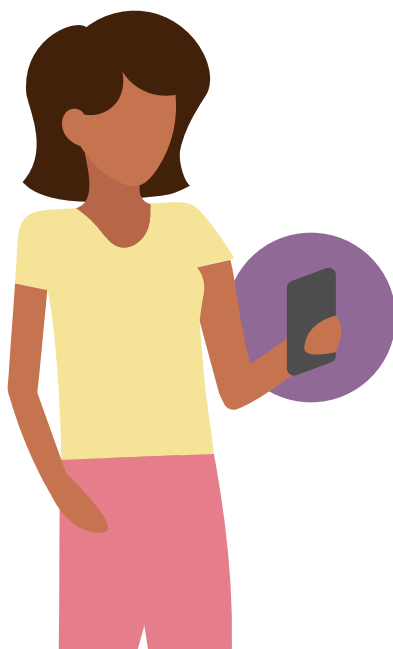
**About Public Rec:** Public Rec is a Chicago-based clothing company specializing in men's athleisure wear. All the clothes are designed for comfort, style and function, thanks to the tailored fit and custom-made performance fabric.

**Metadata in Action:** There's no better way to make the reader feel like a VIP than telling them that they're on the list for one of the best-selling items, the All Day Every Short. With a similar strategy to cart abandonment, the metadata of the item's name and image is included to remind the customer what they expressed interest in. The CTA to follow the brand on social media is a great example of cross-channel engagement. While this user patiently waits for the return of the shorts, they can swing by the company's Instagram page for Outfit Of The Day (OOTD) inspiration and styling tips.

The image shows a promotional email from Public Rec. At the top, it says "PUBLIC REC" and "YOU'RE ON THE LIST". Below this, it states: "We'll let you know when the All Day Every Day Short is back in stock." To the left of the text is a photo of a person wearing dark shorts and white sneakers. Below the main text is a section titled "IN THE MEANTIME, CATCH US ALL DAY EVERY DAY ON INSTAGRAM" which contains a grid of six photos showing various clothing items and people wearing them. At the bottom of this grid is a button that says "FOLLOW @PUBLICREC". Below the grid, it lists "FREE SHIPPING • FREE RETURNS • FREE EXCHANGES". At the very bottom, there are social media icons for Instagram, Facebook, and Twitter, followed by the company's address: "COMFORT. MADE SMART. 213 W. INSTITUTE PLACE #702 CHICAGO, IL 60610" and a small link: "More email, more problems? You can [unsubscribe here](#) if you need to."

Source: [Really Good Emails](#)

So far, you've seen four types of campaigns powered by product metadata. Next, we'll explore how to deliver personalized recommendations in any marketing message.





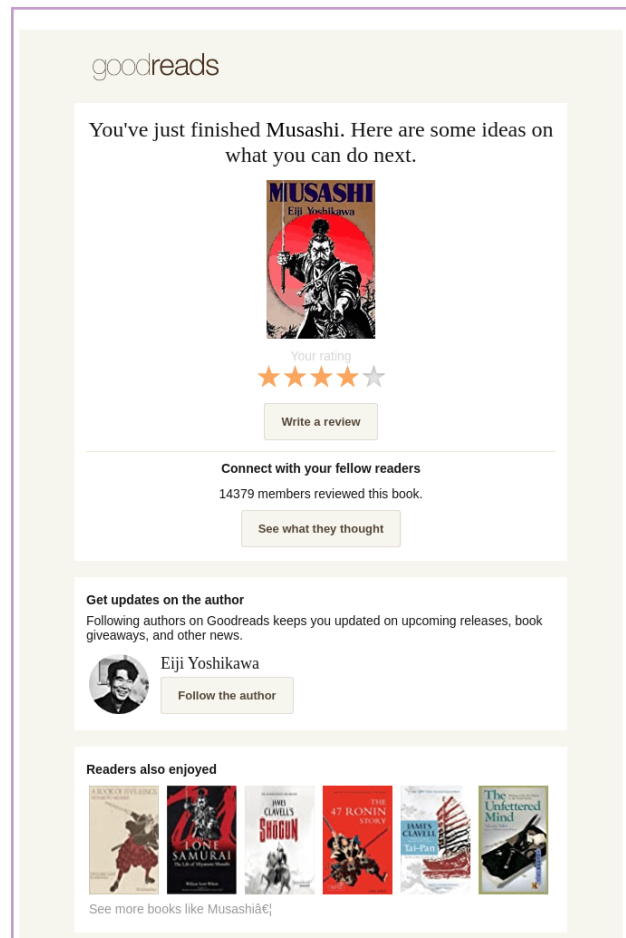
## Recommendations

From books to restaurants and everything in between, consumers expect a certain level of personalization, and it's your duty as a marketer to meet—and exceed—their expectations. And metadata is at the heart of that personalization.

### Inside Look: Goodreads

**About Goodreads:** Launched in 2007 and acquired by Amazon in 2013, Goodreads is the world's largest site for readers and book recommendations, with a community of [90 million users](#). Members can track the books they've read, write reviews, connect with authors, and engage with their social networks.

**Metadata in Action:** Within minutes of marking a book as completed, readers are sent an email by Goodreads, asking for ratings and reviews. This message is populated by the book's metadata, which includes its title, cover image and author. Goodreads also incorporates a "Readers also enjoyed" dynamic content module, which keeps users coming back to discover more books they'll love and increases long-term engagement and retention.



Source: [Really Good Emails](#)

### Mini Assignment

It's time to apply what you've learned with this final exercise.

- Visualize your perfect email.** Is it clean and simple, or is it more sophisticated? There are no right or wrong answers here.
- Identify the data types** in your perfect email. If you'd like, brainstorm with your team for added fun.
- List the metadata** you need to build your product catalog.

# The 3 Challenges of Advanced Personalization

Throughout your marketing career, you've probably heard ad nauseam how vital personalization is to your company's success.

In an ideal world, you would have access to all the data you need to launch customized campaigns at scale and drive maximum revenue.

However, advanced personalization is difficult for many marketers because they have to contend with three main challenges.



## 1. Data access

Data accessibility is a major pain point for marketers as they traditionally don't have ownership of customer and product data. Instead, they rely on engineering or data science teams to retrieve the information they need. The lack of transparency, coupled with the inability to access data directly, creates **siloed information** that may not even be accurate or relevant by the time it reaches marketers.



## 2. Time to market

As a result of data inaccessibility and silos, it can take weeks to build and deploy personalized marketing campaigns. Slow time to market is a lose-lose for both customers and brands: They don't receive messages that are valuable to them, and you risk them abandoning your business for a competitor who can better serve their needs.



## 3. Program flexibility

With legacy marketing platforms, it becomes nearly impossible to efficiently manage real-time data and individualize marketing campaigns as a business grows to tens or hundreds of millions of users. This lack of program flexibility when it comes to data management is one of the primary reasons why Gartner claims that **80% of marketers who have invested in personalization will abandon their efforts by 2025**.

The path to personalization is a tough road, indeed, but there is a better way. You can have complete ownership of your customers' data and advance your personalization game like never before, thanks to individualization solutions, like Iterable's Catalog.



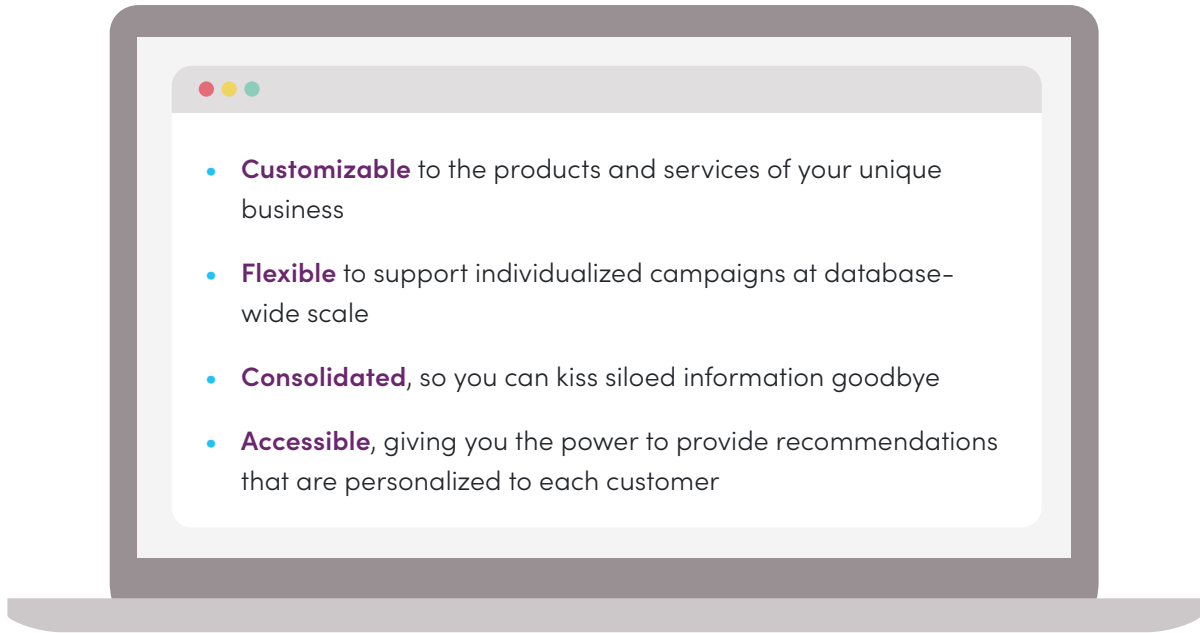
80%

of marketers who have  
invested in personalization  
will abandon their efforts  
by 2025

Source: Gartner

# Individualization Solution: Say Hello to Iterable's Catalog

**Catalog** is designed to empower modern marketers to supercharge their campaigns with product metadata. Its recommendation engine provides endless possibilities for deep personalization, in a way that is:



**Recommended Products** [🔗](#) USE IN TEMPLATE

Catalog: shopifyProducts  
Description: Add a description [🔗](#)

Items satisfy **any** of the following clauses EDIT READ ↺ ↻

**MUST HAVE**

where	rating	>	Greater Than	Custom Value	4
and	in_stock	=	Equals	Custom Value	<input checked="" type="radio"/> True <input type="radio"/> False
and	location	↔	Is Within	Contact Property	5 Miles of last_geo_location

ADD FIELD

+ OR ADD A GROUP

Items To Return: 3 Ordered By: rating x IF

Preview with sample data from: Contact Email SAVE AND PREVIEW SAVE ONLY

*Iterable Catalog makes it simple to recommend products based on metadata criteria, like rating and location.*

## Closing Thoughts (Combine the Powers of Personalization)

Congratulations! You've reached the end of your personalization journey, so give yourself a pat on the back.

By now, you should have a solid understanding of the three levels of personalization and their corresponding data types:

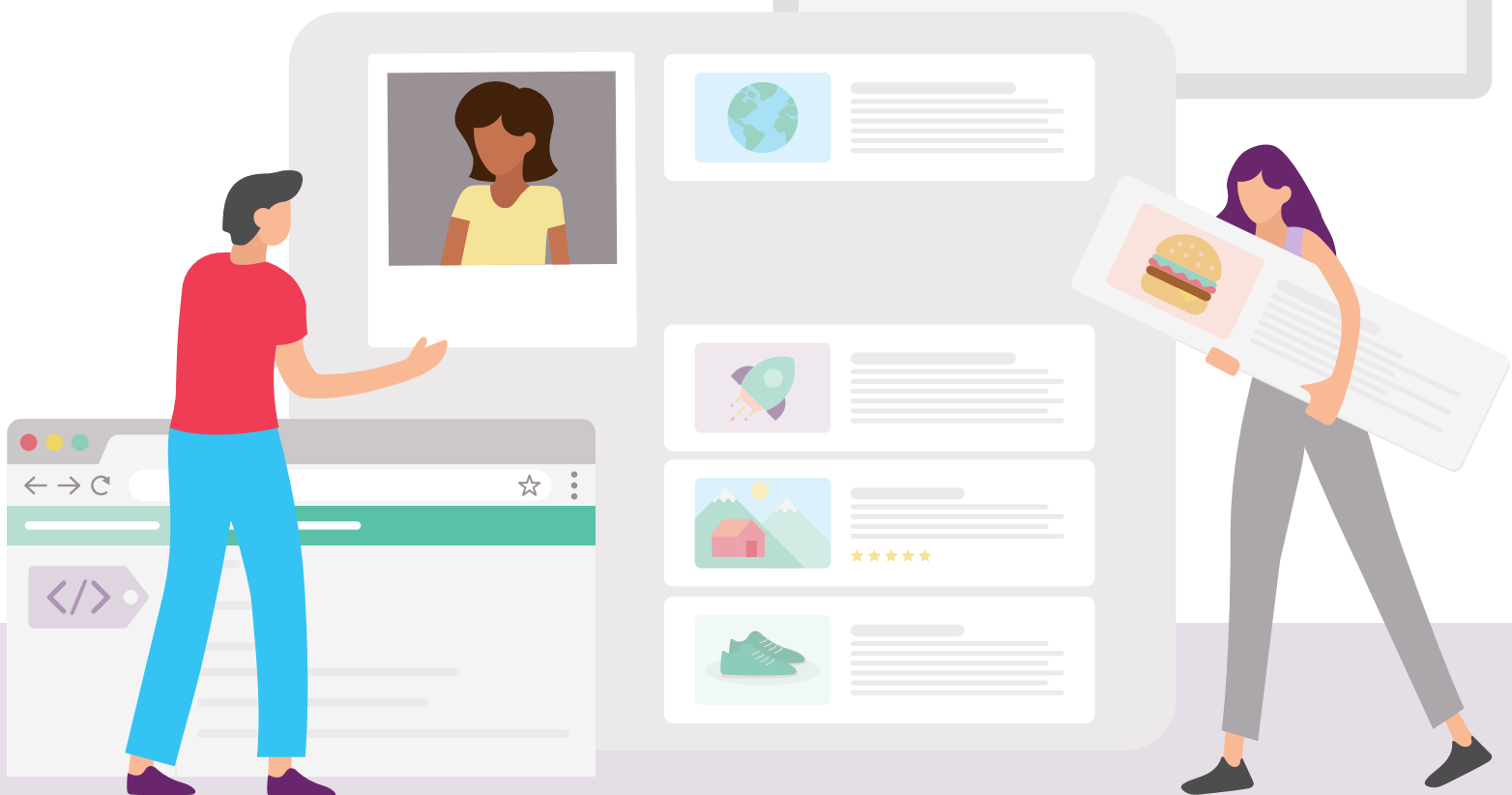
- **Level 1:** Reactive personalization with user and event data
- **Level 2:** Proactive personalization with data feeds
- **Level 3:** Individualization with metadata

With your newly acquired knowledge, you can get creative and combine data types to provide unique, 1:1 experiences for your customers. Remember, your campaigns can be as simple or as sophisticated as you want them to be. Start small and experiment, then work your way up as you gain more customer-specific insights.

Over time, you'll be able to create a perfect union between customer and product data to deliver value throughout the entire lifecycle.

### Want to know how you stack up?

Assess your marketing sophistication with Iterable's [Personalization Maturity Model](#). By taking a short quiz, you'll receive a scorecard identifying where you are on your own personalization journey, as well as additional resources on how to level up!



# About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize campaigns to power world-class customer engagement across email, push, SMS, in-app and more with unparalleled data flexibility. An integrated, cross-channel solution—built for marketers, trusted by engineers, designed with intelligence.



## Data Flexibility at Your Fingertips

Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.



## Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.



## Agile Iteration & Optimization

Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.



## Customer Journey Mapping

Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable, please [request a demo](#).

## Trusted By:

