

LEARNING MADE EASY

Iterable Special Edition

Personalization

for
dummies[®]
A Wiley Brand



Discover the Holy
Grail of personalization

Build a personalization
strategy

Create messaging that
engages customers

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you by



ITERABLE

Stephanie Diamond

About Iterable

Iterable is a cross-channel platform that powers unified customer experiences and empowers marketers to create, optimize, and measure relevant interactions and experiences that customers love. Leading brands, like Zillow, DoorDash, Calm, Madison Reed, and Box, choose Iterable to power world-class customer experiences throughout the entire life cycle. Visit iterable.com for more information.



Personalization

Iterable Special Edition

by Stephanie Diamond

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A Wiley Brand

Personalization For Dummies[®], Iterable Special Edition

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Introduction

Making your brand stand out among the competition in today's marketplace is crucial. What's the most powerful way to do that? You personalize your messages based on your customers' needs and values. This way, they know that you authentically care about them. You achieve this by utilizing a cross-channel platform that collects all your customers' data and responds to them as real people, not faceless entities.

About This Book

Welcome to *Personalization For Dummies*, Iterable Special Edition. This book helps you discover the fundamentals of personalization and customer experience management. You dive into the history of personalization while figuring out the importance of establishing the right message, finding the right person, perfecting delivery based on time, and touching on the various channels through which you can deliver personalized messaging — both online and offline.

This book covers several topics, including the following:

- »» Reviewing the Holy Grail of Personalization
- »» Determining who your perfect customer is
- »» Reaching customers with the right message
- »» Engaging your customers at the right time through the right channel
- »» Looking at the ten data types needed for advanced personalization

Icons Used in This Book

Throughout this book, different icons highlight important information. Here's what they mean:



TIP

The Tip icon highlights information that can make doing things easier or faster.



REMEMBER

The Remember icon points out things you need to remember when searching your memory bank.



WARNING

The Warning icon alerts you to things that can be harmful to you or your company.

Beyond the Book

This book can help you discover more about personalization, but if you want resources beyond what this book offers, Iterable can give you additional insight:

- » iterable.com/product: Discover the cross-channel platform that powers unified customer experiences.
- » iterable.com/solutions/personalized-marketing: Learn about creating a robust personalized marketing experience.
- » iterable.com/personalization-maturity-model: Where are you on your personalization journey? Take this quiz and find out how you score on the four foundational pillars of personalization.
- » iterable.com/resources: Stay updated with all new marketing content.

- » Introducing personalization
- » Recognizing the key attributes of personalized marketing

Chapter 1

Seeking the Holy Grail of Personalization

The explosion of companies, channels, and content on the web has created fierce competition among organizations that need to not only add new customers but also keep the ones they have engaged and entertained. Your brand must continually vie for customer attention and is under constant pressure to stand out in a sea of messages that bombard your customers 24/7 — figuring out how to reach them with a message that matters can be a daunting task, but don't fear! You can meet the challenge of delivering a great customer experience across their preferred channels on their own terms.

This avenue is known as the *Holy Grail of Personalization*, which consists of reaching the right customer with the right message at the right time on the right channel. This chapter touches on each of these four elements and demonstrates how the smart use of a cross-channel marketing platform can help your brand achieve meaningful, long-lasting relationships with your customers.

Let's dive into a little bit about what personalization is and how the Holy Grail of Personalization fits into your marketing efforts.

Defining Personalization

Personalization is the act of tailoring a great customer experience based on all the information that a company has collected about its customer. It combines the use of technology and tactics to deliver an individualized message to the right audience.

The advent of technology that can collect and analyze all kinds of data has created a great opportunity for marketers. They can now reach a deeper level of understanding about their customers. In this section, you consider why this is possible and why it matters.

Recognizing the changing marketing landscape

Delivering a truly personalized digital experience hasn't always been possible. Historically, digital marketers controlled the message. The brand salesperson served as a gatekeeper of the information and pricing of products and services. Customers needed to interact with them to make buying decisions.

With the advent of powerful internet search tools such as Google, customers could find their own information, which meant that brands needed to make sure their websites and other forms of communication included relevant information that recognized customers' needs. But zeroing in on a personalized message for every individual among millions of potential customers was still virtually impossible.

Fast-forward to today. With a cross-channel marketing platform, you can now deliver great experiences using all kinds of customer data (regardless of data structure). The modern technology ensures that brands reach consumers at every stage of the customer journey.



REMEMBER

The specific technology that makes this personalization possible includes

- » The use of real-time data that makes it possible to launch, measure, and fine-tune campaigns on the fly
- » The use of automation that ensures customers receive the message at the right stage of the customer journey

- » The use of Artificial Intelligence (AI) — among other intelligence algorithms — that provides smart decisions and predictions based on historical data

Understanding why personalization matters

In today's marketplace, personalization is a competitive advantage. But more importantly, your customers *expect* a personalized experience. If you can't engage them with relevant information, messages that matter, and products and services they value, you'll lose them. They're quickly off to find another brand that's more exciting and meaningful to them. Therefore, personalization can build a lasting relationship and is a strong determinant of your brand's success.



TIP

Personalization benefits both your customers and your company. Those benefits include the following:

- » **Building relationships:** Customers feel valued when messages are relevant. They believe that you care about them as people. They develop a more lasting relationship with your brand.
- » **Promoting brand awareness:** By creating meaningful customer experiences, you gain awareness and positive feelings for your brand. Some customers may even become brand ambassadors.
- » **Fostering loyalty:** Customers will keep coming back to your brand if they're treated like a VIP each time they engage.
- » **Increasing repeat business:** Personalized content can encourage repeat business and an uptick in conversion rates.

Avoiding being creepy

Utilizing all forms of customer data is crucial to personalization, but it also introduces privacy challenges that affect its collection. You have to be careful about how and what you include in your communications to ensure that your customers don't feel that you "know too much" or are exploiting their data for your own purposes.

Enter all the recent data guardrails created to protect customer privacy. Marketers must adhere to a variety of laws, regulations, and corporate policies and practices that include General Data Protection Regulation (GDPR), California Consumer Privacy Act (CCPA), and Apple's Identifiers for Advertisers (IDFA). Customers may not be aware of or up to date on these changes, but they *will* know when they feel you've violated their privacy.

Identifying the Holy Grail of Personalization

The Holy Grail of Personalization is the ability to reach the right customer with the right message at the right time on the right channel. By using this framework, you can see how each element works together to create a memorable and engaging personalized experience.

Attracting the right person

Do you really know your customer? Today, you have to go beyond the superficial identifiers (like first name) to demonstrate that you understand what they value and how they see themselves. A cross-channel marketing platform collects the data you need to know your audience at an individual level and enhances their experience with relevant messaging. Chapter 2 gives you more information about how to attract your perfect customer.

Cultivating the right message

Every business competes for the few moments of attention that customers may give them. To encourage them to spend more time with your brand, you need to develop their trust and show them that you align with their values and interests. When they do turn to you, you need to engage them with a message that matters. The addition of a cross-channel marketing platform lets you analyze real-time, behavioral, and event data to trigger personalized messaging at scale. For more about how the right message can reach your customer, flip to Chapter 3.

Identifying the right time

The right time to deliver a great experience is when your customer is ready to receive it. The right time is determined by using a customer's previous engagement and behavior to send messages when they're most likely to convert. It accomplishes this by using machine learning (ML) to analyze historical engagement behavior and select an optimal, per-person send time.



REMEMBER

With the right personalization tools, you won't have to wonder when the right moment arises. Your technology determines that for you and delivers it. For more details about the nuances related to targeting the right time, check out Chapter 4.

Targeting the right channel

Targeting the right channel is key to delivering your message where your customers prefer to receive it. You can have seamless customer engagement across email, Short Messaging Service (SMS), in-app, web push notifications, mobile push, direct mail, or social media at every stage of the customer journey. Chapter 4 dives into the details on targeting the right channels.

- » Recognizing your audience
- » Getting to know your customer
- » Capturing customer data and feedback

Chapter 2

Finding the Right Person

You can learn more about your customers than ever before by collecting data from all their interactions with your brand. The key to finding your perfect customer is to harness this data to deliver an exciting, personalized customer experience. To accomplish this, marketers must turn to a cross-channel platform that automates sending messages targeting the right person. But who exactly is the “right” person?

This chapter explores how you can determine who your perfect customers are and what problems they want your products and services to solve.

Identifying Your Audience

Do you genuinely know your audience, or do you only have a shallow understanding of who they are? Take a look at the following questions to help you identify your audience and their preferences:

- » **Who are they?** Data gathered to answer this question includes targeted user fields, contact information, demographics, and preferences. You also want your technology to dig deeper to give you a contextual understanding of your audience’s values and needs.

- » **How do they interact with your brand?** Are they using a mobile phone, a laptop, or iPad? You want to know which devices they use so your messages reach them the way they prefer receiving them.
- » **Which channels are they using?** Knowing which channels they use to interact with your messages is essential to reaching your prospects and customers where they are. See Chapter 4 for details about how to find the right channels to send communications to your customer.
- » **When is the best time to engage with your audience?** Your cross-channel platform gives you this answer by analyzing customer behavior patterns to reveal the best time to reach them.

Knowing Your Customer

When you want to determine who your customer is, your cross-channel platform can analyze and segment the various data points they share. This information includes

- » Online shopping habits
- » Survey feedback
- » Loyalty program information
- » Social media behavior
- » Website and app engagement

In this section, you look at two key ways to categorize data points to understand your customers' profiles better.

User attributes

User attributes are the points of data that contain personal characteristics. They include a customer's name, email address, location, devices they use, and so on. They're unique to each user and tell you general information about who they are.

Event data

Event data gives you information about how your customers engage with your brand. These data points include macro-events such as the products they buy and micro-events such as opens, clicks, and page views.

UTILIZING DATA FEEDS AND METADATA

Capturing user attributes and event data is just the start of the personalization journey. To create *advanced* personalized messages, you can use two other types of data:

- **Data feeds:** Data feeds are externally managed and not part of your company's data collection but can be valuable to the customer. For example, sending an email about leisure travel and including a local weather forecast (an external feed) can help customers plan their itineraries. This information leads to hyperlocal advertising opportunities for shopping, eating, and entertainment. The customer will perceive this as a valuable piece of information, and it helps build the relationship.
- **Metadata:** Metadata describes your brand's products. Identifying which products a prospect is searching for can help you create a targeted message to that individual.

Flip to Chapter 5 for more information on these data types.

Because these interactions are event-based activities, they're called *event data*, and they're used for behavioral targeting and marketing. When aggregated together, they tell a rich story about user interaction.

Asking Your Customer

Collecting customer data is an essential part of personalization. But, sometimes, the best way to know your audience is just to ask. You can put the power in their hands and let them tell you exactly what they want. That's often easier said than done, though. You need to collect customer data in ways that make it more likely you'll get answers you can use.

This section gives you the ways to gather feedback by conducting a survey and evaluating customer sentiment.

Survey feedback

Getting feedback from your customers is an incredibly valuable tool when you need data to make decisions. Well-constructed surveys help brand marketers make essential decisions with information coming straight from the customer.

When planning your surveys, make sure to include these three essential ingredients:

- » **A question to answer:** The first thing you want to identify when planning your survey is the question(s) you're trying to answer. Ask yourself what you need to know. You don't always need to ask many questions. Make it brief and targeted. Customers will appreciate the brevity.
- » **An irresistible offer:** This offer is an important ingredient. The answers may be critical to you but less so for your customer. That's why you need to offer something in return that will make customers willing to spend their valuable time and money with your brand. The offer could be something simple like a discount or a coupon. Another possible reward (if applicable) could be a copy of the final report created by the survey.
- » **Something to measure:** To simplify data collection, sometimes a ranking scale is a better choice than free-form text. Two standard methods include the Net Promoter Score (NPS) and Likert Scale.



REMEMBER

When you ask for feedback, be careful not to request it only after a good or bad experience — it skews results.

Customer sentiment

Have you ever experienced a company crisis when your brand made a mistake in its messaging or posted something on social media that offended your customers? If so, you'll likely never forget it — and it may have had lasting repercussions for your company. To avoid this, you need to establish marketing strategies that connect with your audience, so the connection is always authentic and meaningful.

Being empowered to tune into customers' feelings (which change constantly) means capturing the sentiment of every customer, not just a targeted customer segment. Understanding how customers feel about your brand in real time across channels is referred to as *sentiment*.



REMEMBER

One of the reasons that analyzing customer sentiment is so valuable is that you can evaluate engagement. Customers that are more active are likely more positive about your brand than those that never engage.



TIP

Discovering the right audience and placing them into brand segments is challenging. It's not easy to label customers positively, negatively, or neutrally. By using a cross-channel platform that supports sentiment analysis, you can better execute personalized marketing campaigns. You won't need to guess how your audience is feeling about your brand.

ITERABLE'S BRAND AFFINITY

Analyzing how customers feel is now possible with tools such as Iterable's Brand Affinity. Brand Affinity is an intelligent personalization solution powered by Iterable AI.

With Brand Affinity, marketers gain a unique advantage by

- Intelligently translating customer engagement across channels into deeper, more meaningful connections with their customers
- Transforming the way you market and connect with your customers more authentically

Marketers are now empowered to tune into their customers' feelings and harness the versatility of Brand Affinity across the Iterable platform to personalize the customer experience at every stage of the customer life cycle.

- » Understanding message relevancy
- » Establishing why empathy is essential

Chapter 3

Establishing the Right Message

Marketing messages must be relevant, or they get lost in a digital sea of sameness. But how do you define relevancy? What is the right message, and how can you ensure that your message matters? The key to answering these questions is to use customer data. With the right personalization strategy, you can gain insights into what your customers need and want and then deliver the right message. This chapter explores what makes a message relevant and the value of empathy when creating all your marketing communications. It's no longer a "nice to have"; it's a necessity.

Crafting a Relevant Message

In this section, you look at the elements that must be present in your message to make a difference to your customer.

Giving purpose to your customer experience

The first key element for sending your message is identifying a clear purpose. Scheduling messages to go out without a reason to

send them is a good way to train your customers to ignore them. They're expecting great experiences that have value. Before you send a message, ask yourself the following questions:

- »» What specific value does this message have?
- »» How does it advance customers' understanding?
- »» Does the message help customers do something they couldn't do themselves?

Putting your customer at the center of your narrative

Connecting with your customers requires that you put them (and not your product) at the heart of the stories you tell. Learn about their needs and help them recognize how they'll benefit if they buy your products. Consider these questions:

- »» How will this message acknowledge who your customer is?
- »» Which message elements reflect your customers' needs?
- »» How is this message tailored to customers' current situations?

Targeting a specific stage in the customer life cycle

Customers define their own unique buying journeys. To meet their needs at each stage, you need to have content that answers their questions and helps them move to the next stage. What are these life cycle stages?



REMEMBER

Marketers use a variety of different models, but the three distinct stages are as follows:

- »» **Activation:** At this initial stage, companies want to stimulate customer attention and interest. Create a great customer experience to get your customer to spend more than a few fleeting seconds with your brand.
- »» **Nurture:** The nurture stage is ongoing. It takes time to build relationships, and companies need to continually deliver relevant and entertaining information to keep customers engaged and interested in purchasing.

- » **Reactivation:** Your customer relationship is established at this stage. They've already purchased a product or service. To drive retention and customer loyalty, you need to keep customers engaged and delighted.

Can you answer the following questions?

- » What do you want your customer to achieve at this stage?
- » What actions must your customer take before moving to the next stage?
- » Which steps can you acknowledge the customer has already taken?

Identifying conversion milestones

Prospects may engage with your content. But, downloading one PDF or reading a few blog posts isn't sufficient to educate them about the value of your products. You need to keep them coming back for more, so it's essential to discern when they're ready to buy instead of remaining at the evaluation phase. To illustrate how this can be done by creating the right content, break down the activation stages (see the preceding section) into three phases:

- » **Discovery:** Customers learn about your product as a possible solution to their needs or problems.
- » **Familiarization:** Customers investigate your products and services by looking at your website content, blog, and other digital channels.
- » **Mastery:** When customers have reached this phase, they're clear about how your products can meet their needs and whether they want to make a purchase.



TIP

Pinpoint when your customers are in the mastery phase so your content aligns with their expectations and encourages them to take action.

Delivering meaningful content

Creating relevant content is part art and part science. Your cross-channel platform can analyze your customers' behaviors

and then take that analysis and develop content based on what you've learned. To do this, consider the following questions:

- » How can the content reflect the individual's needs at this specific time?
- » What images can be used to draw attention and evoke a connection to their experience?
- » What specific recommendations and products align with a customer's interests?

Why is Empathy Critical?

Empathy is the ability to relate to and understand the feelings of others. It has always been an essential part of marketing but has become even more relevant post-pandemic. Don't just consider it a buzzword; it counts.



REMEMBER

Demonstrating that you understand how customers feel is key to building ongoing relationships. It signals that you genuinely care about them. Empathy starts with authenticity and transparency. Customers want to know that you respect them and won't misuse their data; therefore, transparency is vital.

Another factor that plays a vital role in expressing empathy is that customers expect more personalized messages from brands. Digital companies use personalization technology to deliver more relevant content to their customers. Additionally, customers are savvier about the value of their data and expect a meaningful return for sharing their personal information.

Businesses want partners and trusted advisors to help them make sense of all the information they've gathered instead of just delivering a generic sales pitch. A study by Deloitte found that brands that deliver more humanized experiences are twice as likely to outperform the revenue growth of their competitors. Make sure you consider the customer as a real person when you construct the messages you send.

To deliver your message effectively, consider addressing four unique attributes of empathy:

- » **Acknowledging perspective:** Understanding someone's perspective involves the ability to listen and learn. You need to assess a customer's values and viewpoints before you construct a relevant message.
- » **Avoiding judgment:** Customers want to know that your brand aligns with their values. If you send out what customers perceive as a judgmental message, you'll lose them.
- » **Recognizing emotion:** Make an effort to recognize how your customers feel and respond mindfully. Listen first.
- » **Communicating to understand:** The world is going through a period of significant change. Supporting customers using the right tone is crucial as they progress through their unique customer journey.

IN THIS CHAPTER

- » Understanding how to define time parameters
- » Looking at channels available to marketers
- » Identifying cross-channel marketing techniques

Chapter 4

Selecting the Right Time and Channel

Delivering your message at the *right time* and through the *right channel* are critically important. Simply put, a *channel* is a method (for example, email or SMS) that you use to have a conversation with your customer. To make sure your customers receive your messages, you need to know which channels they prefer.

What is meant by capturing your customer's attention at the *right time*? The right time is the optimal time that your customer is likely to engage with your message. Your cross-channel platform collects data on how and when customers engage with those messages and determines the optimal time to send them. Consider an example: If your customer opens their email at 8:00 a.m. every day, you probably should send them an email at 7:58 a.m. because it's likely they'll read it at that time. That's the right time for *them*.

This chapter explores the importance of time delivery and how cross-channel marketing helps marketers build solid customer relationships.

Recognizing Dynamic Customer Behavior

People expect immediacy in their communications — this means near-instant replies to text messages and online searches available to answer any question. Therefore, it's impossible to overstate the importance of being responsive to customers' needs. Personalization tools that automate these responses in real time make the difference in meeting customers' expressed and inferred needs.



WARNING

If a prospect receives a message from your brand that says, “We’ll get back to you within two days,” you can be sure your competitor will be there with answers in real time.

To determine how well your company responds to customers' immediate needs, ask yourself the following:

- » Are the types of communications you're sending triggered by a customer's real-time behavior? Sending messages that require manual intervention ensures that you'll miss the right time to engage your customers.
- » How long does it take to create and deploy a new segment or campaign? Are you creating new campaigns from scratch every time?
- » How quickly can you act on newly captured customer data? Without a cross-channel marketing platform, you're missing a valuable opportunity to engage with prospects.



WARNING

How often you contact your customer heavily influences customer experience. Overdoing it can do more harm than good. Sending several emails out about the same product or service several times a day without getting user permission is a surefire way to make customers abandon your brand.

Engaging Your Customers

Customer engagement refers to the strength of a customer's relationship with a brand as measured by a defined series of benchmarks throughout the customer journey. In this context, a customer is defined as anyone that *engages* with your brand regardless of whether they've purchased anything. You can

measure their engagement by collecting the metrics on how they interact with messages you've sent. In this section, you look at how multi-channel communications have evolved.

Evolving channel communications

How can you reach your customer with your communications? You know the answer is *channels* — and there are plenty of them. In the early days of the Web, marketers used a *single channel* — email — to reach their audience with mass communications. Aside from the messaging on their website, they did their best to create a relevant message for everyone. Clearly, this didn't work well. A message to everyone is a message to no one. Personalization wasn't even on the radar. Marketers didn't have the technology to collect any meaningful data or create profiles, so creating a message that mattered was a hit-or-miss proposition.

Enter blogs and social media platforms. As channels proliferated, a *multi-channel* strategy became possible. Theoretically, you were able to connect many customers across your brand's digital assets. But it wasn't until the advent of mobile devices and the development of a cross-channel marketing platform that an authentic customer relationship could be forged.

Today a multi-channel journey can integrate communication channels — email, mobile, direct mail, social media, and more — to streamline interactions with your brand.

Using a cross-channel strategy

Your customers pick their preferred channels and expect you to make communicating across them a seamless experience. That's why a cross-channel strategy is crucial. You want to entertain, educate, and engage your customers on all the channels they frequent.

What do we mean by a cross-channel strategy? Let's look at an example. A customer may read an email on their mobile phone, your cross-channel platform notes this, and then sends a push or SMS to reach that same customer on their mobile phone . . . where they already were. You want to make sure that at any point, your customer can switch over to a different channel and complete any task without friction.

Observing Communication Channels

Marketers have many channels at their disposal today. In this section, you consider some of the marketing channels currently available to help build meaningful customer relationships.

Email

Email remains an effective channel for communicating with customers and businesses. You can create a campaign that's informative, educational, persuasive, or sales-focused to establish unique touchpoints for a broader marketing opportunity. Email can incorporate many data types/sources to reach customers wherever they are. By using a cross-channel platform, you can follow customers' activities and behaviors to create personalized messaging. You can engage your customers by using email in four ways:

- » **Welcome email:** Start by sending every new subscriber a welcome email. Sending a welcoming message to every new subscriber helps drive engagement immediately. This email can include links to a promotional offer, introductory videos, or tips for making the most of their subscription.
- » **Email marketing newsletters:** When users agree to receive a newsletter from your company, they expect you to promote current sales or products. They're also expecting you to share valuable content. Don't disappoint! In the past, email newsletters weren't personalized. Now, brands can segment content delivery based on personal preferences such as likes, dislikes, demographics, and behavioral data.
- » **Transactional emails:** A transactional email is sent after a customer makes a purchase. An example is an email with a subject line such as "Thank you for your order." These emails should display your brand identity and be personalized based on what you've learned about the customer.
- » **Triggered messages:** Also known as a *drip campaign* or *email sequence*, a specific user behavior triggers this email. For example, when customers visit a website and compare product prices, they receive an automated email the next day asking them if they're still interested in buying the product.

Direct mail

Direct mail is the only channel that's not digital — no device required. It's an advertising method that has held its place in marketers' hearts because many people still like it, and response rates can be good depending on what you're offering in the mailer. You can include several things such as a catalog, a coupon, or a sample.

SMS

Short Messaging Service (SMS) reaches customers with messages on their mobile devices. Customers feel that these communications are more personal than other channels and are an effective way to foster long-term engagement. Notifications can be as simple as a reminder or information that provides order status updates and promotions.



TIP

SMS messages contain only text. When you want to send images, video, and audio, use Multimedia Messaging Service (MMS) instead.

Mobile push notifications

Push notifications are messages that you send from your branded mobile app. If your customers have opted-in, they can receive them. It's up to the user if or when they read them, so they're in control. This method lends itself to building an ongoing relationship. Notifications via mobile push can range from notification of product shipment, warnings alerts, and informative content.



REMEMBER

To improve response rates, succinct messaging, personalization, targeted send times, and push action buttons should all be included, as necessary.

Mobile inbox

A mobile inbox is an inbox within a mobile app. Just like an email inbox, you can review your messages repeatedly. Mobile inboxes provide you with a great opportunity to test out your messaging. You can set an expiration date and see which ones are popular or perhaps need to be sent from a different channel.

In-app

In-apps allow marketers to deploy messages with a highly customized experience to a targeted audience. There is a catch, however — a user must be logged into the app to receive it. A mobile marketing campaign may include onboarding information about buying a product or suggesting an upsell. In comparison to SMS or push notifications, in-app users are automatically opted-in to messages, ensuring that you reach your entire user base.



TIP

One of the benefits of in-app messaging over SMS and push is that it's less intrusive. For this reason, it lends itself to building relationships over time. It can also be used for things like onboarding or drawing users' attention to new app features.

Social media

You know that reaching your customers on social media is a must. The question you need to answer becomes which platforms. Data collected from your cross-channel platform tells you the right time and channel to reach them. Retargeting customers on platforms such as Facebook, Instagram, and Twitter help you keep the brand top-of-mind once they're engaged with your messaging or even click through to one of your websites.



REMEMBER

Following the path a user has taken or determining the number of times a user has clicked on something before taking action helps you understand the context of their behavioral preferences. These preferences can also shape marketing offers in the future.

- » Learning about different types of data
- » Exploring how different data types can be used

Chapter 5

Ten Types of Data for Advanced Personalization

To build successful personalized marketing campaigns, you need to integrate ten types of data:

- » **Zero-party data** is data that a customer directly shares with a brand. Attributes include preferences, favorite colors, preferred channels, purchase wish lists, and more.
- » **First-party data** is data generated by customer behavior and includes social media activities, purchases, transactional data, web behaviors, and any other use of products or services.
- » **User attributes** include contact information, preferred communication channels, and the use of specific devices to access your website or app. The use of attribution data allows for the personalization of every customer experience.
- » **Event data** captures critical details about what your users do as they interact with your brand across each marketing channel. These details are granular, including exactly where the viewer stopped watching a video or what a user clicks on

when using your app. Event data offers an evolving look at your customers' changing needs and interests.

- » **Customer feedback** allows marketers to tailor messaging and communications based on the customer's own sentiments during such interactions as support chats, social media channels, or surveys.
- » **Life cycle data** typically refers to the stages customers go through over time as they learn about and engage with your brand. Marketers need to tailor their communications based on where a customer is in their buying journey. If they're just finding out about your company (awareness), then the data you have is limited, whereas the further in the life cycle, the more data a marketer has.
- » **Sentiment** measures how your customer feels. A customer's range of emotions can go from happy to sad, negative to positive, and everywhere in between. Gathering sentiment enables you to tailor communications to customers who are happy or potentially upset and work on building a long-lasting relationship.
- » **Geolocation** targeting lets marketers use a customer's location (either by GPS or IP address) to determine their advertising strategy. For example, if a brand is located in a specific area or physical space, geolocation can help target customers in that area with a personalized message.
- » **Data feeds** are externally managed information sources outside of your email service provider (ESP) and are updated often. Examples may include RSS feeds for blogs and podcasts. When used in conjunction with user profile data, these feeds can deliver real-time content to a targeted audience, enhancing a campaigns' relevancy.
- » **Metadata** is descriptive information about your brand's products and service offerings. While data feeds can receive real-time information from externally managed web and app properties, metadata is based on your own brand's information. Both data feeds and metadata can be used together to create powerful marketing campaigns.



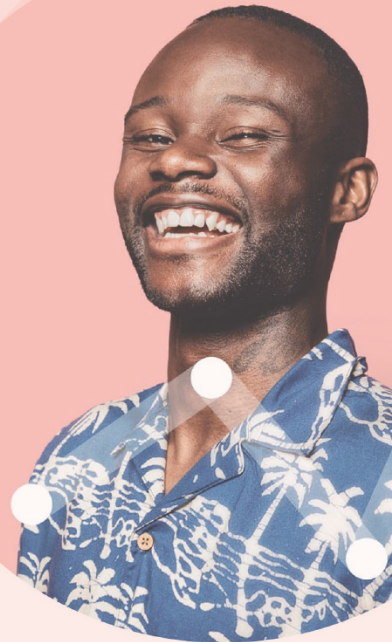
TIP

Differentiating between a good and great marketing campaign often ties directly to the use of metadata. Taking customer-specific insights that are integrated within metadata is the foundation of a personalized experience. Metadata helps inform you of specific content, products, and services your customer will be interested in and infer what action your customer should take next.



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Discover why personalization is powerful

Learning about the fundamentals of personalization and customer experience management sets you on the right path to find your perfect audience, discover the channels they prefer, and engage them with the right messages. In today's marketplace, building lasting customer relationships is critical, and the competition for customer attention is fierce. Unless you focus on the needs and values of your customers and send them messages that matter, you won't be able to build and maintain their trust.

Inside...

- Learn who your perfect customer is
- Create the right message for customers
- Send messages at the right time
- Uncover the channel customers prefer
- Look at data types for personalization



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