

ACTIVATE

LIVE

Using Real-Time Data to Power a Personalized Customer Journey

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Hi, I'm Laura 📌

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Customer Lifetime Value

- Retention
- Order Frequency
- Average Order Value

Ritual

DTC consumer wellness brand offering clean & effective vitamin formulations.



Vegan-friendly



No-Nausea Design Capsule



Gluten & Allergen Free



Non-GMO



No Colorant or Synthetic Fillers



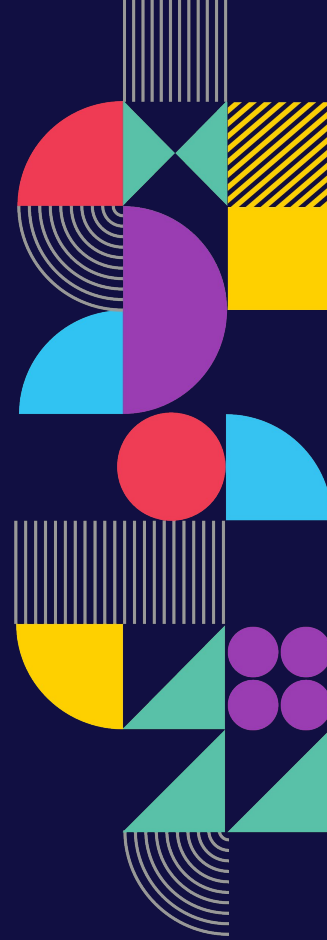
LTV is the long game

 Single email tests for an immediate result

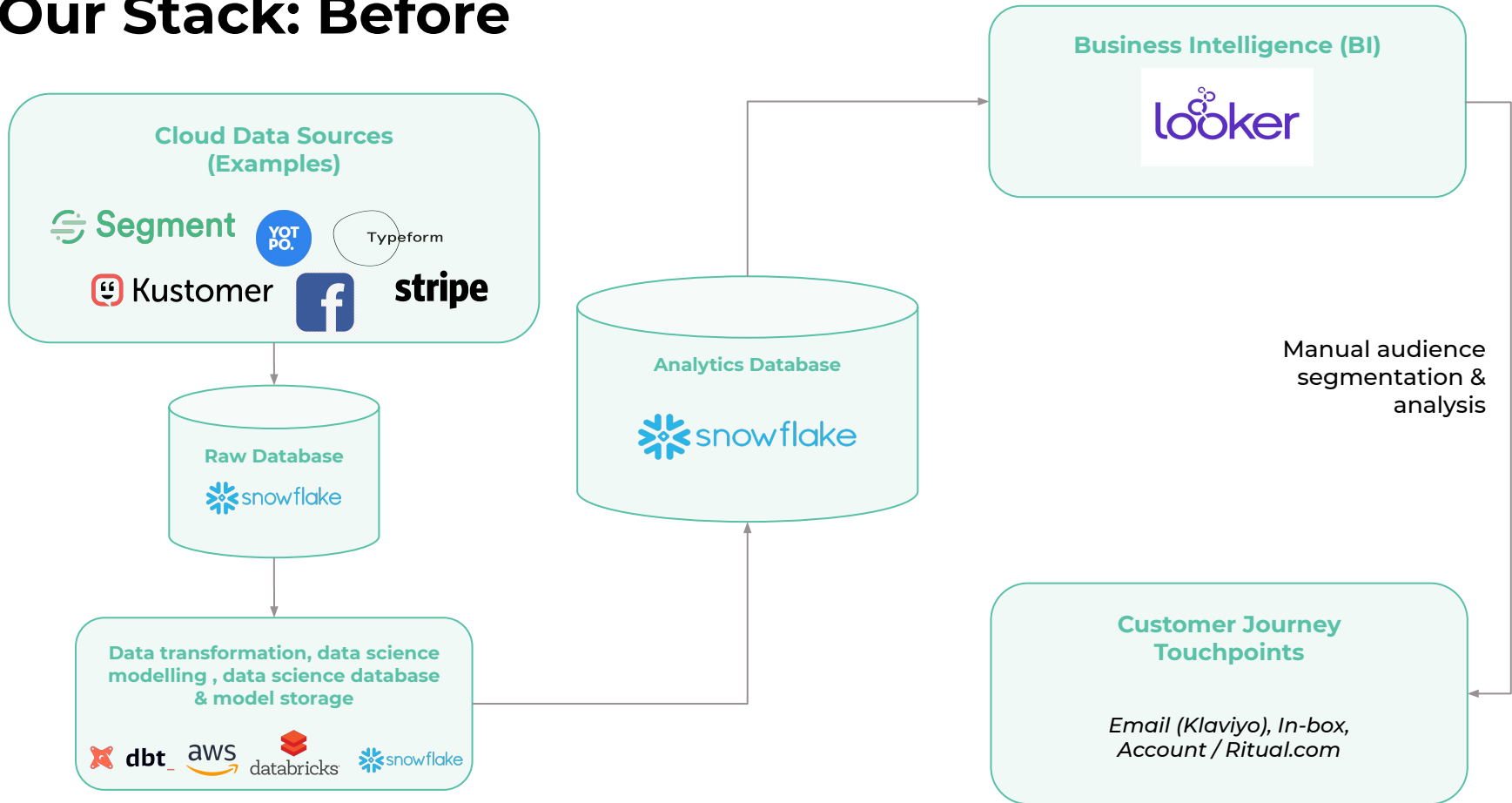
 Clean tests run over a long period of time

 Prioritizing long term metrics over short term wins

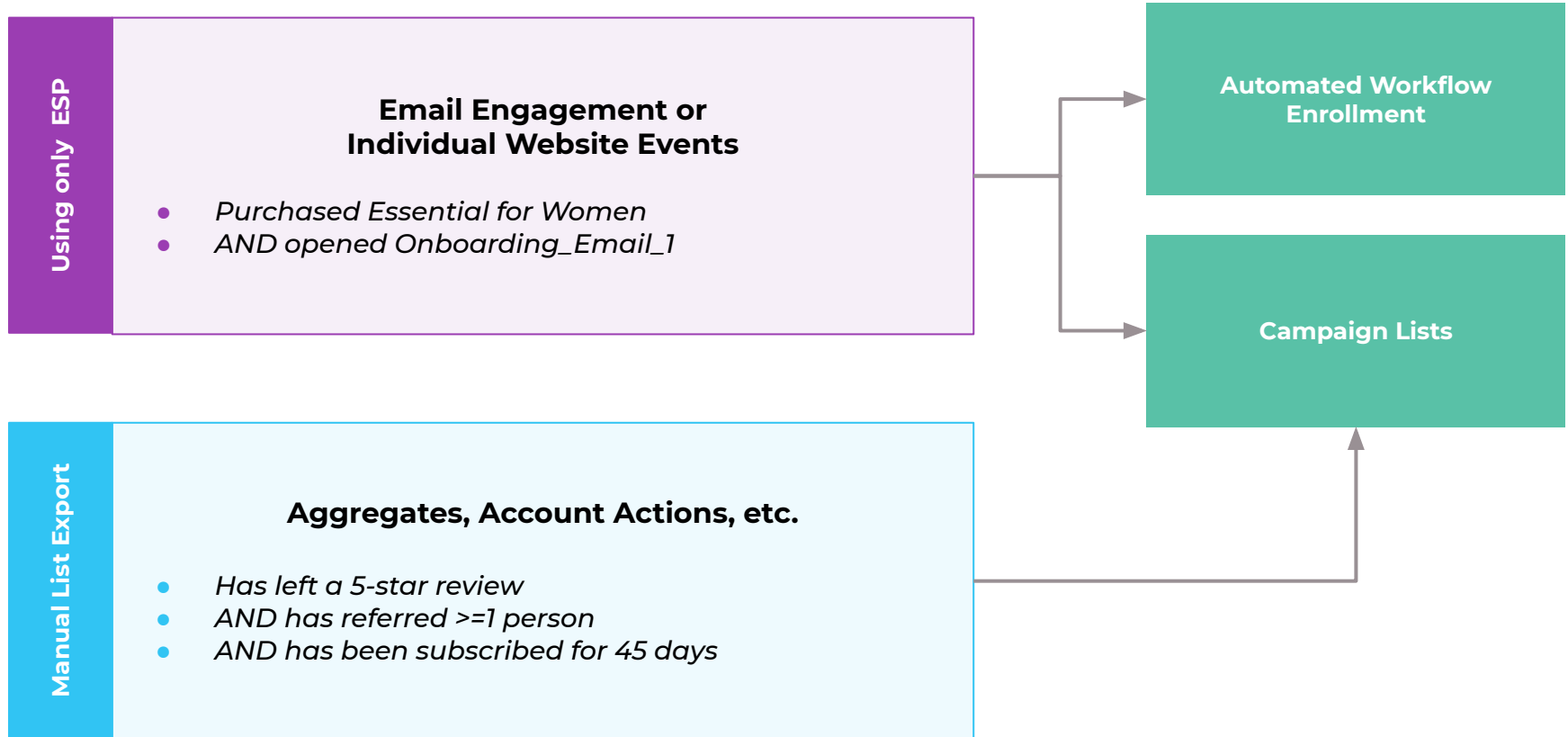
**Create a personalized
customer journey that
delivers increased LTV
by engaging customers**



Our Stack: Before



How we segmented audiences before



How we segmented audiences before



- Overly reliant on manual list creation (SQL or BI tool)
- Lists were not real-time
- Automated workflow enrollment rules were limited to transaction, website event and email engagement behaviors



Each customer email resulted in some level of churn. **Fear of churn** created an unwillingness to email customers.

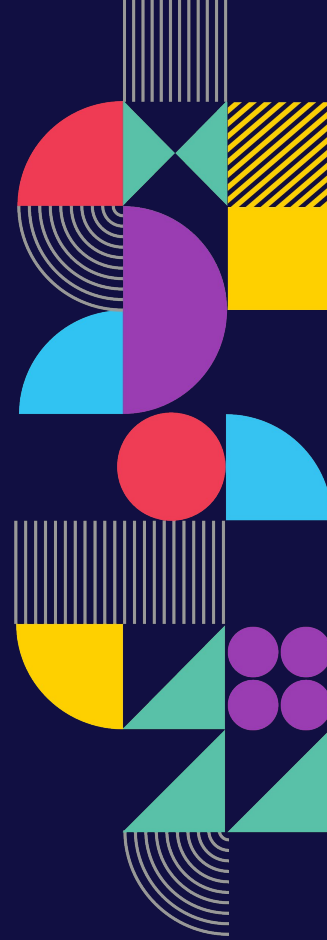


But...customer feedback about emails was consistently positive. **Getting updates** related to how Ritual could be working in their bodies was important.

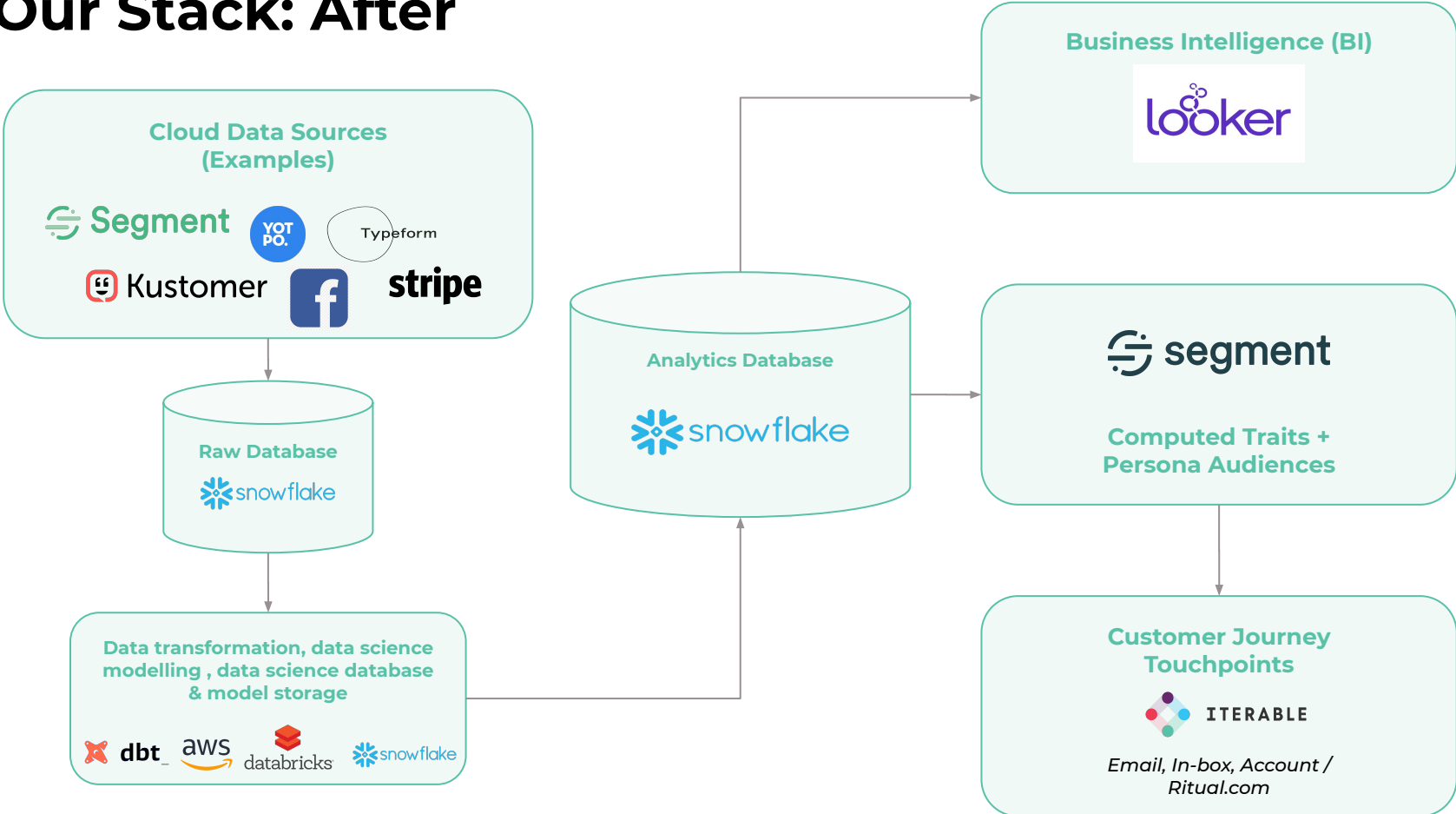




**How do we separate our
best customers from those
at risk of churning and
nurture them differently?**

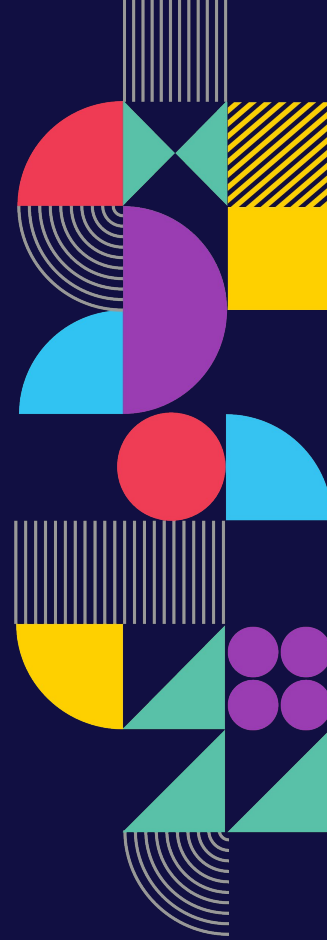


Our Stack: After





**Leverage Persona Audiences
to enroll users in the most
relevant journey.**



The most relevant customer journey

Nurture: Customers who snooze their order in the first 90 days



Nurture with habit-focused content to help them with adherence

Upsell: Customers with a high propensity to adopt product A



Enroll in upsell workflow

At Risk: Customers who have recently attempted to cancel



Create holdout list and exclude from workflows

EXAMPLE USE CASE


Habits 101

A content-focused series on habit building, for those with trouble sticking to their new vitamin habit.


Those who use the “snooze” feature to push out their next order.

Ritual

Back on Track




Kicking off a new habit is hard. We're here to help.



Why You Need to Take your Vitamins Every Day

You consume water-soluble nutrients like vitamin B12 every day, so you have to replenish them. Fat-soluble nutrients are easier to store, but can take longer to build up.

LET'S BREAK IT DOWN [↔](#)



How We Used the Science Behind Habit Formation to Create our New App

Meet the new Ritual app for Apple Watch, which was designed to make taking your vitamins a daily habit.


THERE'S AN APP FOR THAT [↔](#)

Ritual

Building Better Habits

Whether you're vowing to drink more water, cut back on sugar, or—ahem—take your vitamins, there's no denying it: Big and small, habits are the foundation of making yourself every single day.

But you can count on us as your personal habit assistant. From the science behind when to take your vitamins, to putting that science into action, we're here to show you how to conquer your habits, step by step.




Featured Article

What's the Best Time of Day to Take Your Vitamins?

Spoiler: Since you're taking Ritual, the answer is "whatever time works best for you." But if you're curious about how your vitamin interacts with food or an empty stomach, this one's worth a read.

Take Your Vitamins

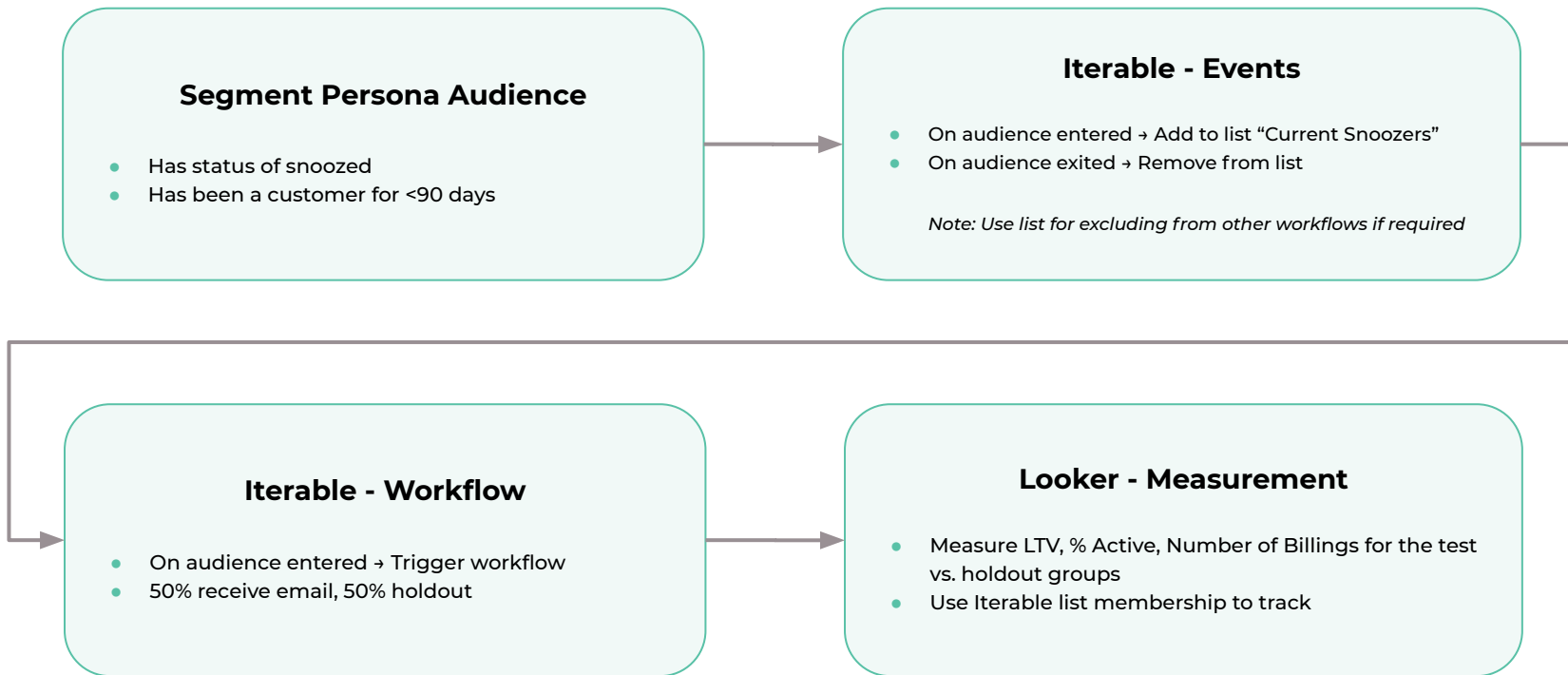


The Science of Staying Hydrated

While many of us know how important it is to stay hydrated, consistent drinking enough water is easier said than done. But in order to build the habit, we think water really means several drinking water's to make. For context: Did you know "8 cups a day" is like 65'?

HEY H₂O, LET'S BE FRIENDS [↔](#)

How it Works



Segment Persona Audience



Edit your audience

This audience contains all users where... Clone

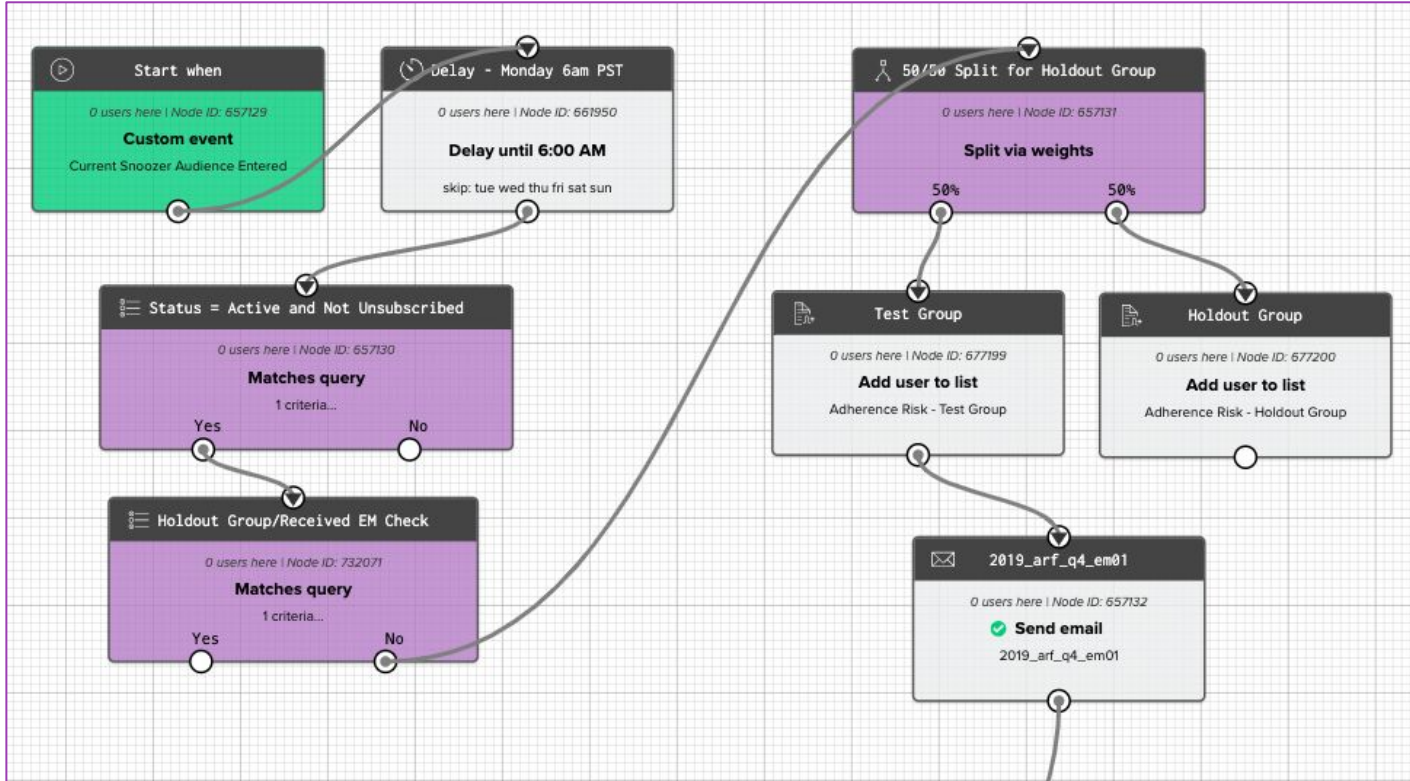
All Users who

- ...have a SQL Trait `current_snooze_flag` equals `Currently Snoozing` Copy Close
- ...or [+ Add Condition](#)

And who

- ...performed `Order Completed` at least `1` time [+ property](#) [+ time window](#) Copy Close
- any time within `90` days Close
- [and then did perform](#) [and then did not perform](#)
- ...or [+ Add Condition](#)

Iterable Workflow



Looker Reporting



1. Bring Iterable list membership into Looker to compare test vs. holdout groups
2. Measure audience size by enrollment date (week or month)
3. Track ongoing retention metrics such as % active and count of cancellations over a long period of time

Your Implementation Checklist



Segment Personas > Iterable

How will I send the personas data to Iterable: Identify or Track?

Identify calls will keep the data stored at the contact level indefinitely - good for information you want to reuse. Track events will live in the event stream - good for audiences that will be discarded

Iterable

How will I ensure users aren't receiving overlapping messaging?

Adding workflow members to a list is a great way to exclude them from other workflows or audiences.

Iterable > Looker (or other BI tool)

How will I track the impact of a workflow over time?

Sending list membership to Looker is a great way to measure the impact on metrics like LTV and retention rate. Remember not to remove people from these lists when they exist a workflow.

What's Next

- **Increased email A/B testing velocity, testing based on richer consumer data (ex: propensity model vs. page view)**
- **Agile audience development to support big moments like product launches**
- **More journeys + less complexity = better customer experience**



**Join me in the
Networking Lounge for
any Questions After**

