



How to Personalize Cross-Channel Campaigns Using Metadata

Personalization Maturity: Level 3



Introduction (Top of the Personalization World)

Let's take a trip down memory lane.

At the beginning of your personalization journey, we briefly introduced you to the three levels of personalization: reactive personalization, proactive personalization, and individualization.

LEVEL 1

Reactive personalization

Reactive personalization is derived from user attributes and event data. It's a one-to-many approach and is applicable to large audience segments. These are the easiest tactics to implement using customer attributes like first name, event milestones (e.g. birthdays), or system events like cart abandonment.

LEVEL 2

Proactive personalization

Proactive personalization combines user and event data with externally managed data. It's a one-to-some approach and is applicable to smaller, targeted segments. This incorporates customer behaviors and third-party data and is more resemblant of individually targeted messaging (e.g. geo-specific services of personal interest).

LEVEL 3

Individualization

Individualization is formed from dynamic relationships between user attributes and detailed product data. It's a one-to-one approach that appeals specifically to each individual. This takes into account various profile, behavioral, lifecycle data points to create user-specific dynamic content experiences that are unique to each user.

In the [first guide](#), we focused on Level 1, where we explored how you can tap into your customers' user and event data and turn them into tailored messages that resonate with your audience.

To help elevate your personalization game, we presented Level 2 in the [second guide](#). There, we specifically highlighted how data feeds can give you the flexibility to scale your cross-channel campaigns, therefore allowing you to deliver even more value to your customers.

Along the way, you got an inside look on some of the leading consumer brands that leverage both data types to create dynamic, bespoke messages. Whether it's Alaska Airlines reassuring travelers about their travel points or Uniqlo powering clothing recommendations through a weather API, these brands knew how to strike the right chord with their audience with enhanced messages.

Now that you're approaching the end of your personalization journey, it's time to bring a third data type into the mix (spoiler alert: it's metadata).

In this final guide, we'll address Level 3 and discuss what metadata is and how you can harness it to create even more dynamic personalization and strengthen the 1:1 connection with each of your customers. We'll also walk you through some cool examples of various campaigns so you can see metadata in action.

What's more, we'll address the challenges marketers face with data-driven personalization efforts and provide a solution that could help you ascend to the top of the personalization world.

Without further ado, let's dive in!

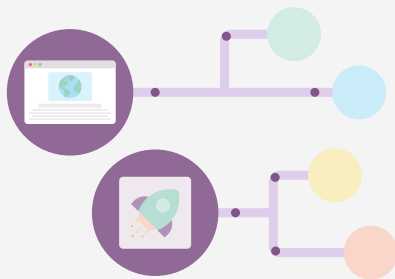
What Is Metadata?

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.



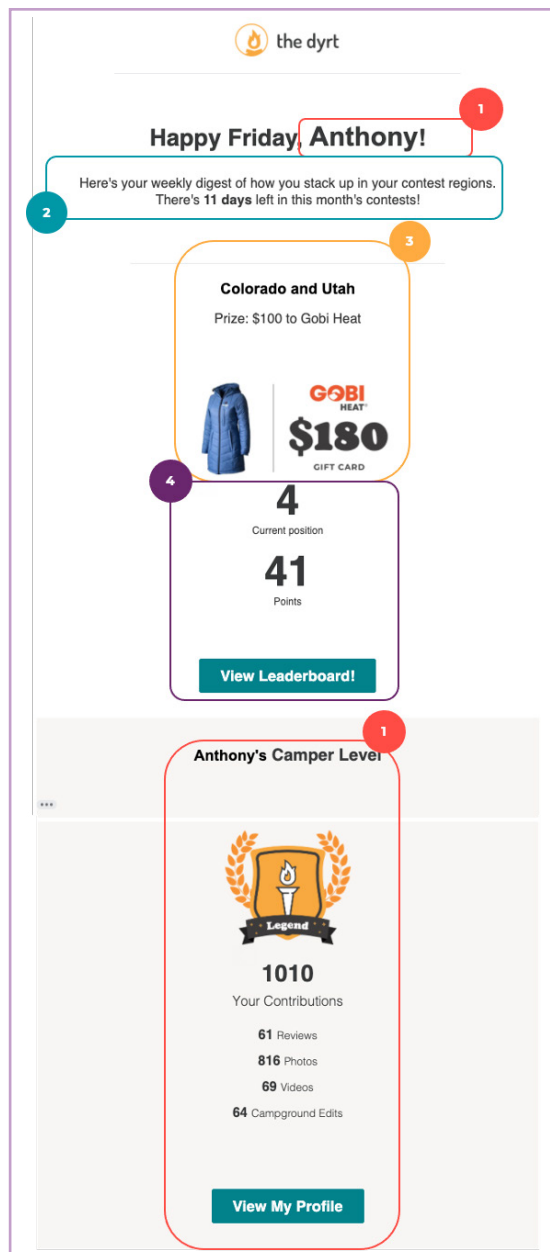
Metadata, on the other hand, is descriptive information about your brand's product or service offerings.

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 Dyrnt](#).

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

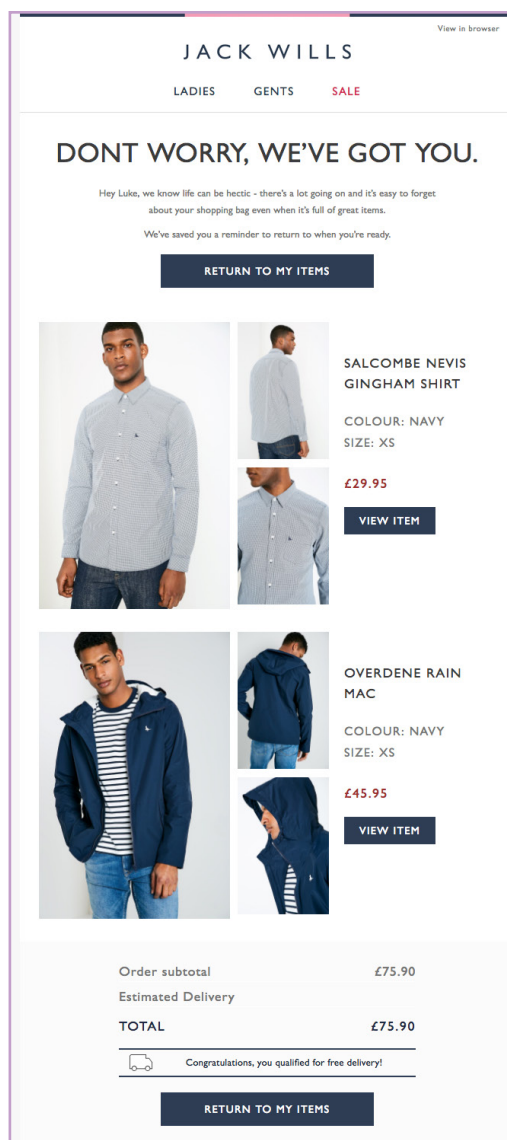
Cart abandonment can happen for many reasons. Perhaps a customer didn't like the items enough to make a purchase. Or maybe they got distracted during the checkout process. No matter what the reason is, cart abandonment is the bane of existence for e-commerce marketers.

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.

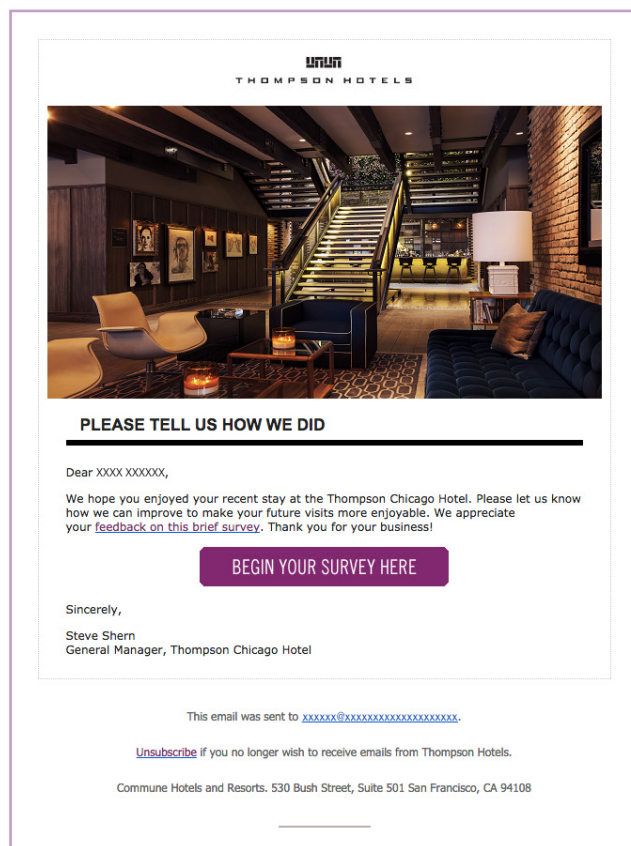
Review Requests

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 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. Shipping and payment details are provided, including the shipping address (Smiles Davis, 600 Montgomery St, San Francisco, CA 94111, United States) and payment method (Credit card). The total amount is \$26.47. The shop information section identifies the seller as "Tanalee" (Owner of 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 email footer includes the seller's name and contact info, and a note about carbon offsets.

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.

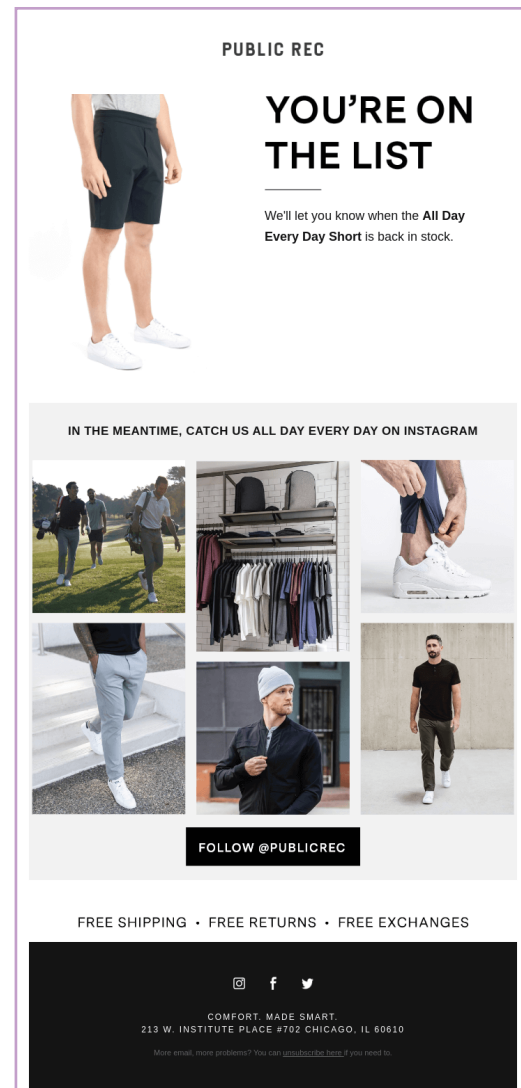
Back-in-Stock Alerts

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

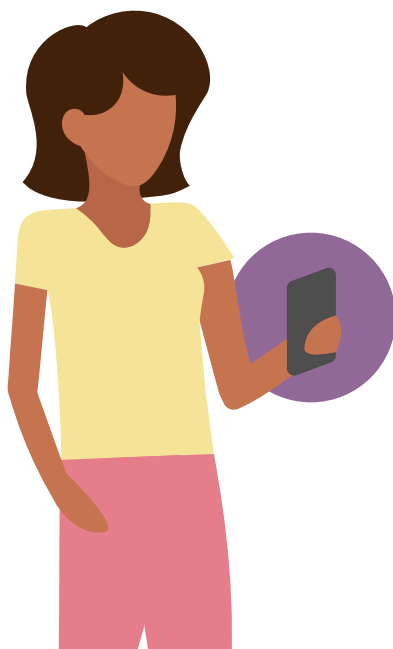
About Public Rec: Public Rec is a Chicago-based clothing company specializing in men's athleisure wear. All the clothes are designed for comfort, style and function, thanks to the tailored fit and custom-made performance fabric.

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.



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.



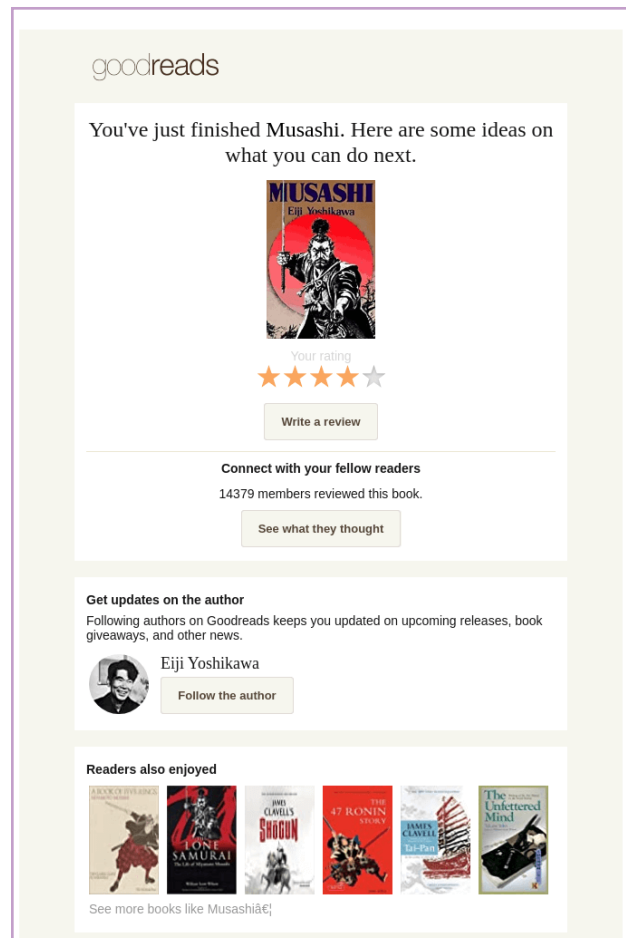
Recommendations

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.



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Source: Gartner

Individualization Solution: Say Hello to Iterable's Catalog

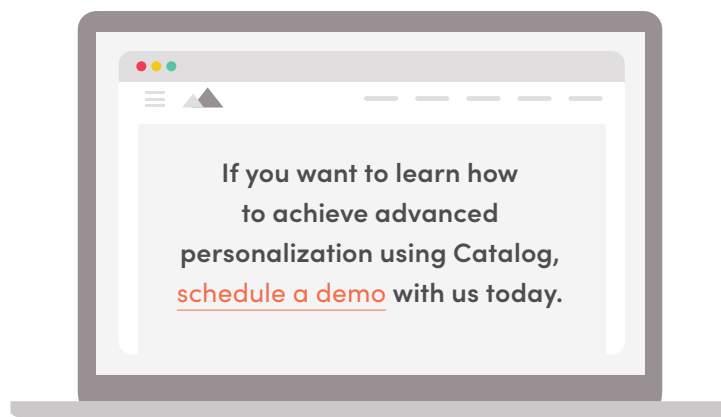
Catalog is designed to empower modern marketers to supercharge their campaigns with product metadata. Its recommendation engine provides endless possibilities for deep personalization, in a way that is:

- **Customizable** to the products and services of your unique business
- **Flexible** to support individualized campaigns at database-wide scale
- **Consolidated**, so you can kiss siloed information goodbye
- **Accessible**, giving you the power to provide recommendations that are personalized to each customer

The screenshot displays the 'Recommended Products' configuration interface. At the top, it shows the catalog name 'shopifyProducts' and a 'USE IN TEMPLATE' button. Below this, there's a 'Description' field with a placeholder 'Add a description'. The main configuration area is titled 'Items satisfy any of the following clauses'. It features a 'MUST HAVE' indicator and a list of conditions: 'where rating > Greater Than Custom Value 4', 'and in_stock = Equals Custom Value True', and 'and location ↔ Is Within Contact Property 5 Miles of last_geo_location'. There are 'EDIT', 'READ', and 'COPY' buttons. At the bottom, there are 'Items To Return' (set to 3) and 'Ordered By' (set to rating) fields, along with a 'Preview with sample data from' section containing a 'Contact Email' field and 'SAVE AND PREVIEW' and 'SAVE ONLY' buttons.

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

Unlocking individualization for your users has always been a daunting task, but with Iterable Catalog, marketers have more flexibility and creative capability than ever before.



Closing Thoughts

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:

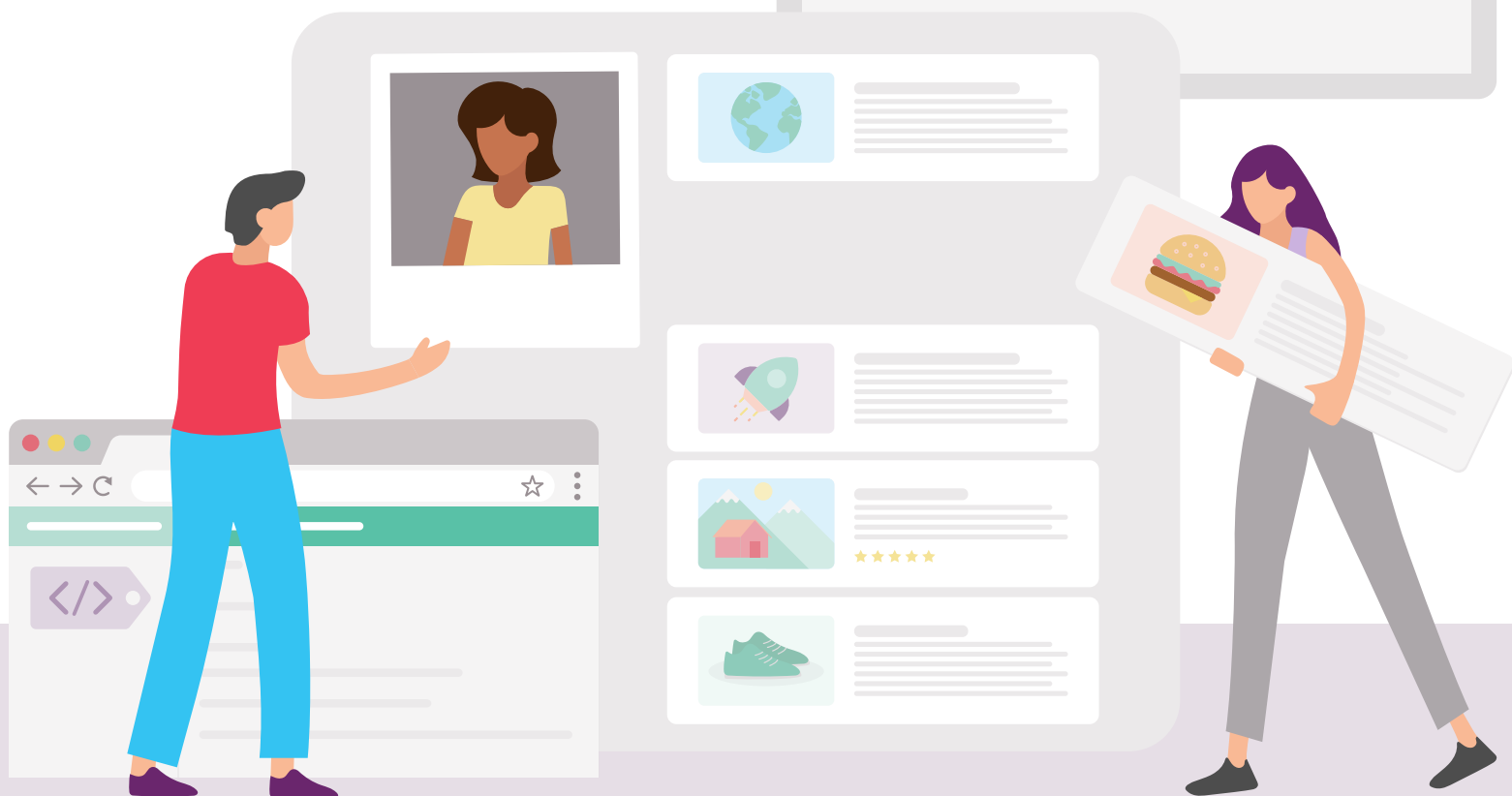
- **Level 1:** Reactive personalization with user and event data
- **Level 2:** Proactive personalization with data feeds
- **Level 3:** Individualization with metadata

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:

