



ITERABLE

# Dynamic Content

PERSONALIZATION PLAYBOOK

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*You're reading the fourth part of Iterable's [Pillars of Personalization Series](#), which covers the topics every growth marketer needs to understand to create empathetic and relevant messaging to customers.*

Every growth marketer knows that personalization is the secret sauce to getting more clicks, conversions, and revenue.

And yet, personalizing a message to every individual user in your database is more complicated than it should be, depending on the email service provider (ESP) you're using.

That's why we at Iterable created the *Pillars of Personalization* series. If you haven't been following along, we've covered the following topics so far:

1. How to build your brand's perfect audience segment, which covers all related to user segmentation
2. The four steps to creating a customer journey map and why it's different than a lifecycle map
3. The building blocks of a customer messaging workflow, and the difficulties of translating your vision into a legacy ESP

So to wrap up our last edition of *Pillars of Personalization*, we're going to be talking about all things related to **dynamic content.**

**Once you read this guide, you'll learn:**

The difference between personalization and individualization

The four types of data you need to create dynamic content

Three must-have tools for building an advanced personalization technology stack

**LET'S GET STARTED.**

# The Difference Between Personalization and Individualization

While most brands personalize their email and mobile messages to customers, they aren't necessarily "individualizing" them. In other words, personalization is so much more than using a `{{first name}}` attribute. To demonstrate how every brand differs in their personalization strategy, we broke it down into three levels in our [Personalization Maturity Model](#):

## LEVEL 1

### Reactive Personalization

Reactive personalization, which is derived from [user attributes and event data](#). This is the personalization most marketers use, writing emails with a first name attribute or triggering an email on a customer's birthday.

## LEVEL 2

### Proactive Personalization

Proactive personalization, which combines user and event data with [externally managed data](#). An example of this would be using a data feed, like a stock ticker or blog RSS feed to target messaging based on personal interests.

## LEVEL 3

### Individualization

Individualization, which is formed from dynamic relationships between user attributes and detailed product [metadata](#). This is the holy grail of personalization because it's almost as good as if your brand wrote a personal email to each and every customer in your database.

Though most growth marketers aspire to individualize their brand messages, they may be stuck at Levels 1 and 2 for reasons they don't have control over. According to Garin Hobbs, director of deal strategy at Iterable:

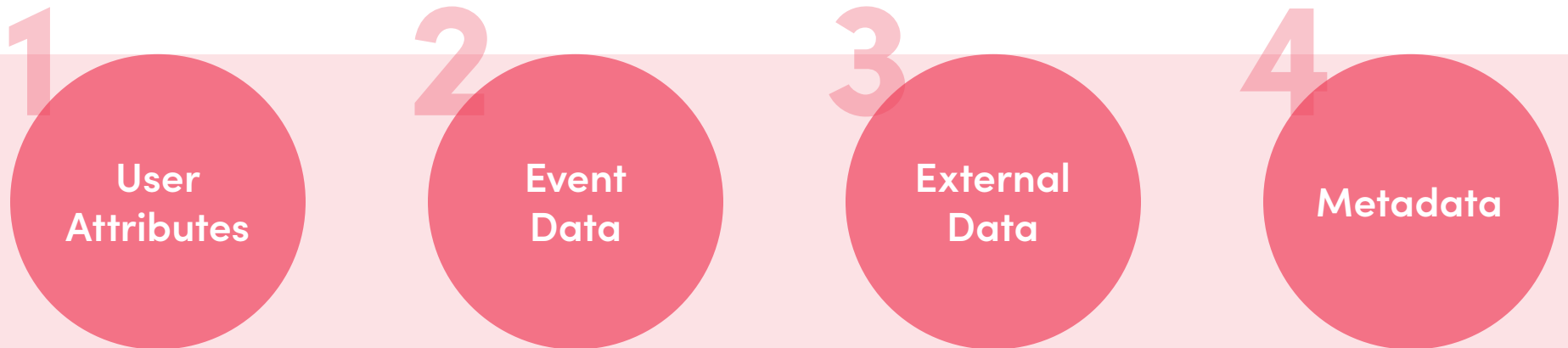


*Executing individualization requires the ability to access all available customer data and quickly surface actionable insights in personalized dynamic content. However, having all necessary data and coordinated messaging channels in a single platform significantly reduces this complexity.*

# The Four Types of Data You Need to Create Dynamic Content

Now that we understand the difference between personalization and individualization, let's talk about the four types of data you need to create dynamic content in your messaging.

They are:

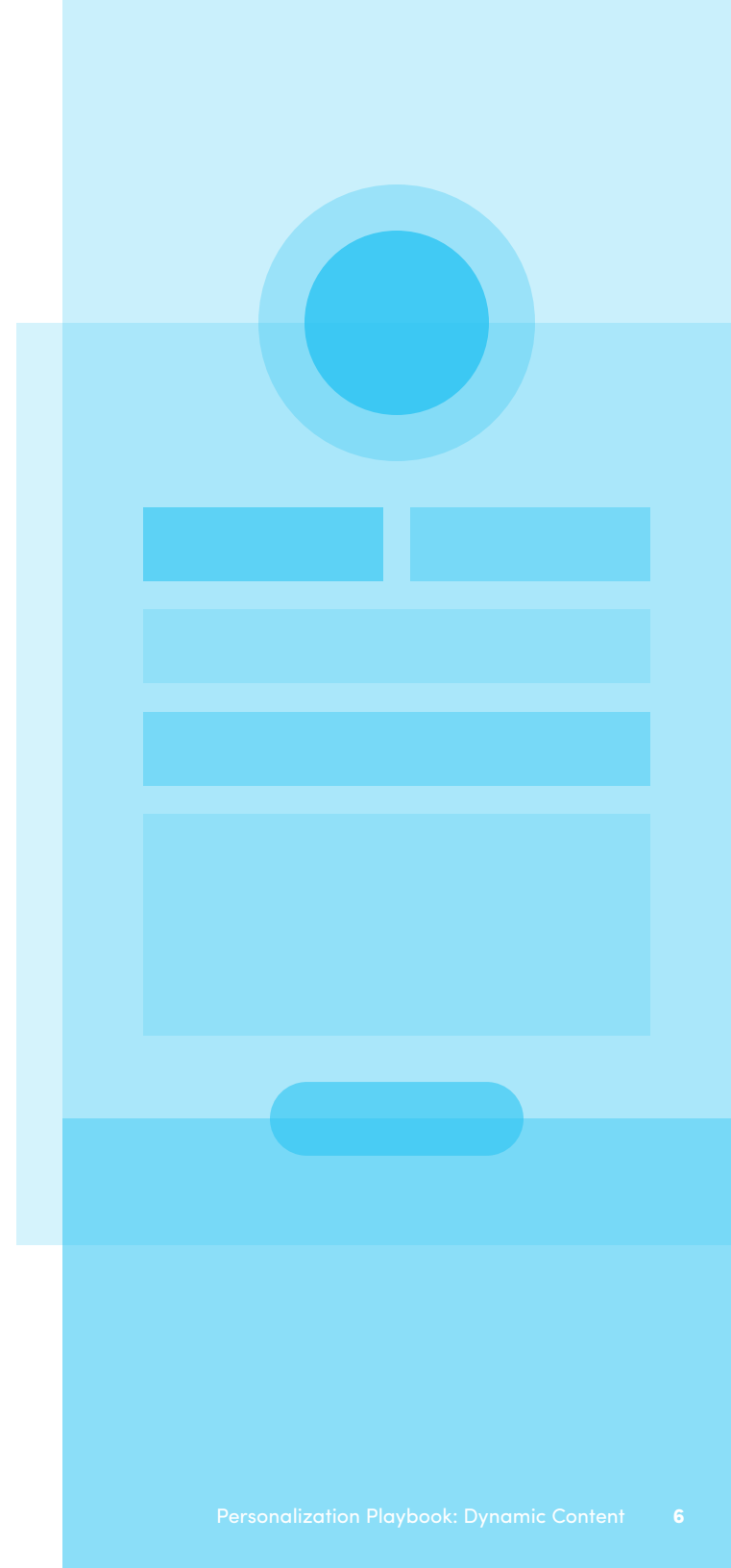
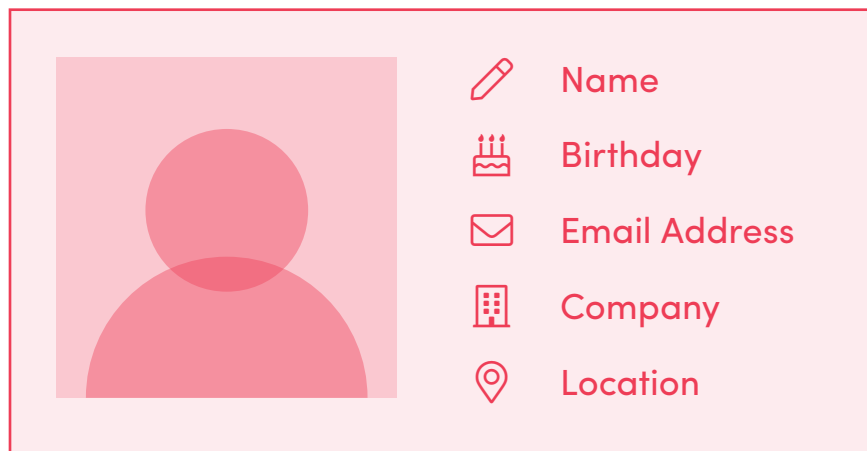


We'll go through each type individually, with examples to illustrate.


TYPE 1

# User Attributes

User attributes are the demographic and personal information you have on each and every one of your customers. Think of information like their first and last name, birthday, email address, and the date they subscribed to your list.



**MASHBURN**



**UPDATE  
PREFERENCES**

We want you to have as much fun opening our emails as we do making them – let us know what kind of news you'd like to receive.

EMAIL ADDRESS \*

FIRST NAME

LAST NAME

ZIP CODE

I WANT TO GET EMAILS ABOUT

Sid Mashburn

Ann Mashburn

Everything Mashburn - Sid, Ann, Kid, all of it

*Figure 1: Clothing retailer Mashburn asks customers whether they want to receive emails about their men's line, women's line, or both.*

Typically, user attributes are submitted through a [Manage Subscriptions or User Preferences page](#), like the one clothing retailer Mashburn uses (*Figure 1*).

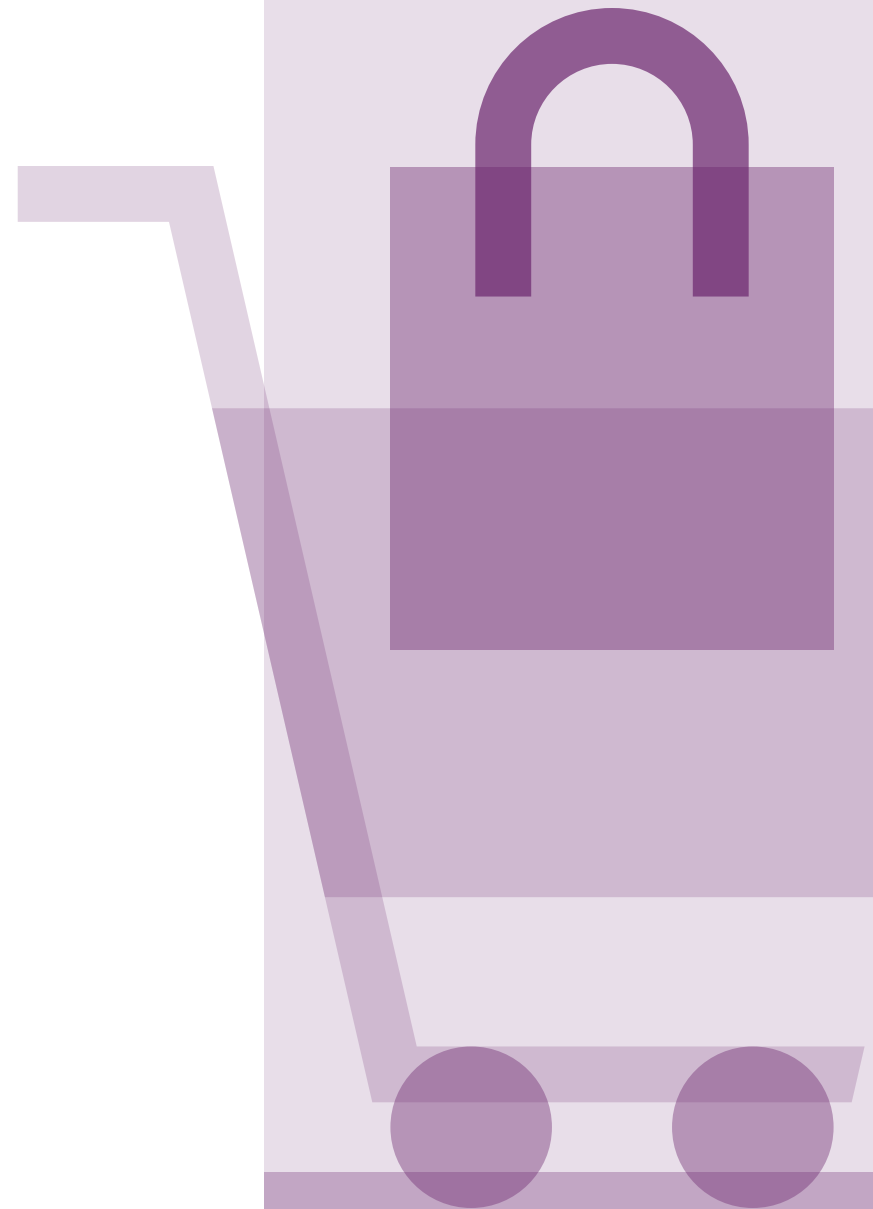
Let us be clear: Brands need user attributes to do the bare minimum of personalization. However, relying exclusively on this data type has limits on how tailored your messaging can get, because it's the customer's responsibility to supply you with their information.

You know that idiom of "actions speaking louder than words?" That's when personalization gets a little more interesting, with our next data type.

# Event Data

Event data is all about the behavior. Brands who utilize event data are analyzing what their customers are doing vs. what they're saying.

So using the example from Mashburn on the previous page, it's great that a user can choose to receive emails about their women's clothing line exclusively. However, that profile becomes more rich and nuanced if Mashburn can pick up on the fact that the user is browsing through a lot of women's Liberty Floral shirts and alter their messaging accordingly.








 MESSAGES 6m ago  
**760-69**  
Wayfair: Your order was delivered.  
Enjoy your shoe storage! More info  
at: <https://www.wayfair.com/uu2ffb82J3>

*Figure 2: Furniture retailer Wayfair sends delivery confirmation notifications using text messaging (SMS).*

 TODOIST now  
Congrats! Reaching 2,500 in  
Todoist Karma makes you an  
Intermediate.

*Figure 3: Productivity app ToDoist sends milestone messages using mobile push notifications.*

Customizing messaging using event data can also be applied to other cross-channel mediums. For instance, furniture retailer Wayfair tailors their delivery confirmation text messaging notifications based on the item the customer purchased (*Figure 2*).

Brands can also use event data to notify their customers about milestones they've reached. Productivity app ToDoist sends congratulatory push notifications based on the number of points accumulated by a user (*Figure 3*).

Both user attributes and event data are crucial for building the foundation of personalization in your messaging. However, using attributes and event data to personalize their messaging only gets a brand to Level 1 in our Personalization Maturity Model.

To uplevel, let's move on to the next data type.

# External Data

For a brand to get to Level 2 in our Personalization Model, it must incorporate external data, typically through a data feed, in its customer messaging.

Data feeds aren't necessarily a data type, but they do add another personalization dimension to your messaging strategy. These feeds aren't necessarily managed by your brand, but typically come from other external sources and third parties.

The concept of data feeds can get a little abstract without a use case, so let's analyze the message from clothing retailer Uniqlo on the next page.



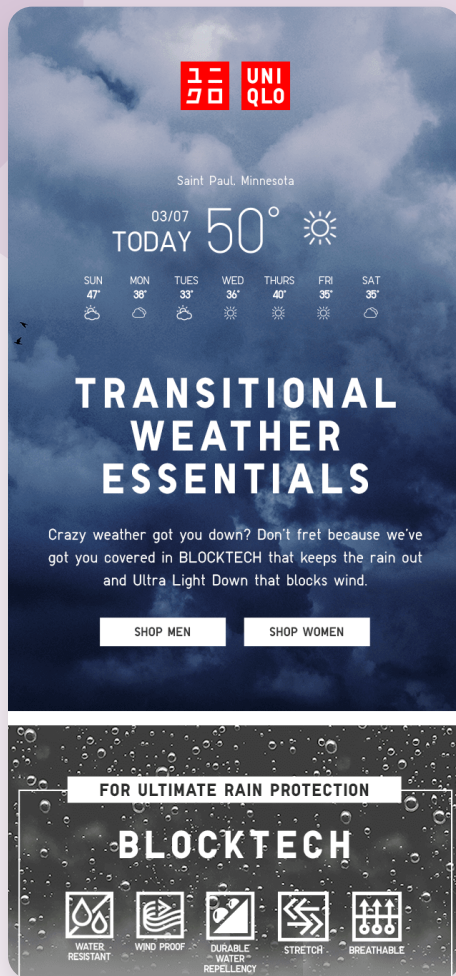


Figure 4: Clothing retailer Uniqlo uses an external data feed of weather to personalize their emails.

Source: [Really Good Emails](#)

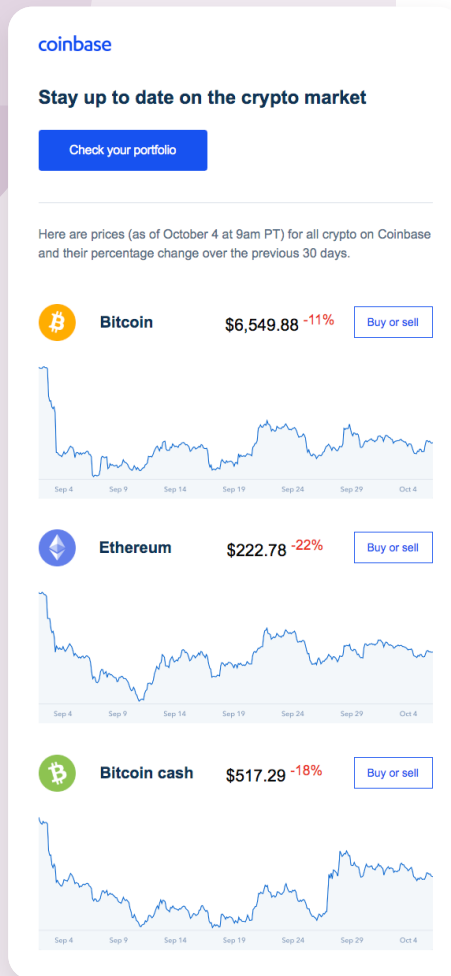


Figure 5: Cryptocurrency exchange Coinbase uses a data feed to display 30-day market performance.

Source: [Really Good Emails](#)

While Uniqlo could send an email simply promoting their BLOCKTECH and Ultra Light Down outerwear, personalizing it to a customer's local weather forecast adds a personalized and empathetic touch to this message (Figure 4).

Another type of data feed you can use is a ticker or API to beef up your newsletters. For example, cryptocurrency exchange Coinbase reports on market performance of the top digital currencies in its monthly roundup email (Figure 5).

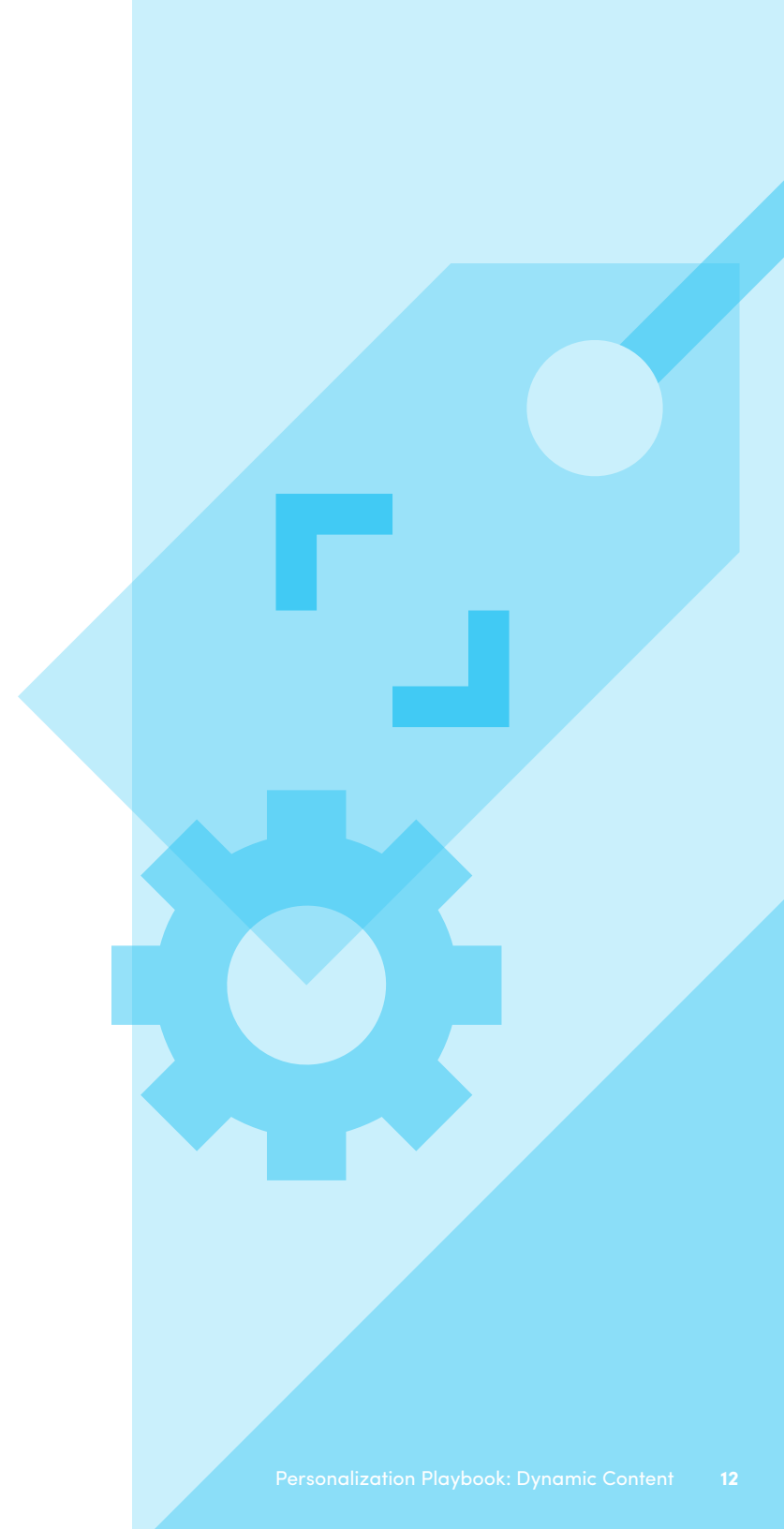
In general, data feeds make it easier for growth marketers to personalize messaging without manual updates. By utilizing one template with a data feed, brands can now personalize messages at scale at the moment of send.

# Metadata

Finally, the holy grail. To get to Level 3 of our Personalization Model, marketers should be utilizing metadata, which is defined as descriptive information about your brand's product or service offerings.

In other words, it's personalizing a message based on what a single customer is doing on an individual basis vs. sending messages based on common characteristics shared by a cluster of users.

A typical e-commerce example of utilizing metadata is through a cart abandonment or product recommendation message. If a retailer can track the types of products and services a customer is browsing or searching for, they can personalize a message to reflect such activity.



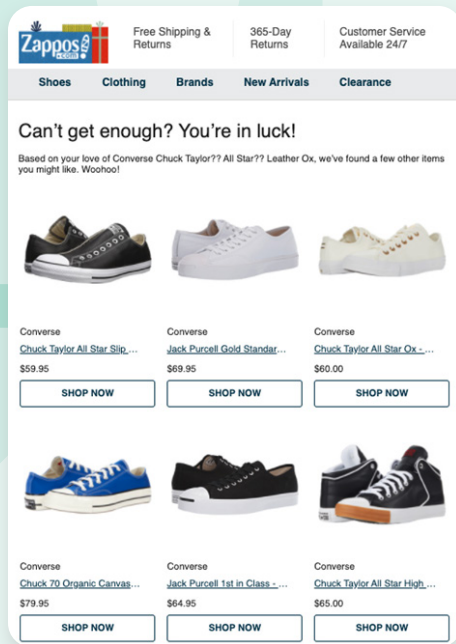


Figure 6: Shoe retailer Zappos uses metadata to populate a product recommendation email.

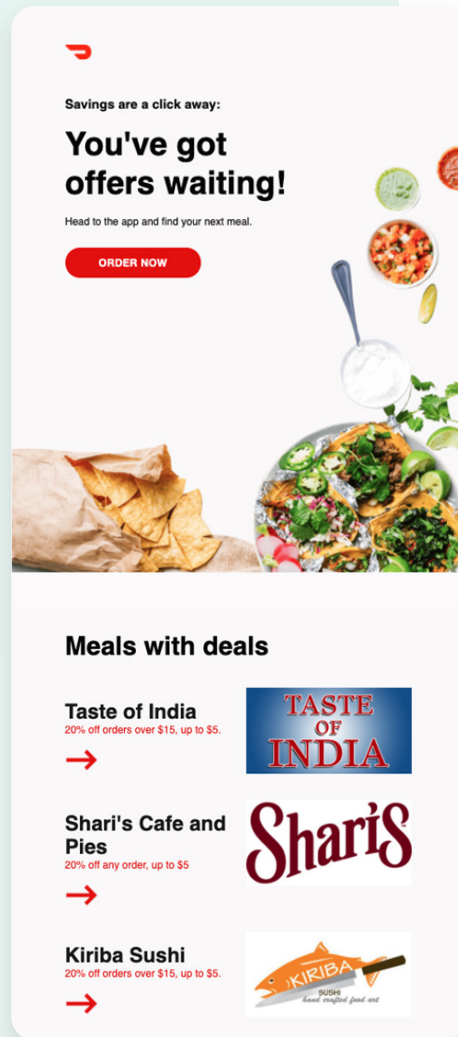


Figure 7: Food delivery service DoorDash can use metadata to populate nearby restaurants based on a customer's geographic location.

For instance, shoe retailer Zappos knows the customer is a fan of Converse shoes, based on their previous purchase history. So it's a pretty good bet that they are interested in similar sneakers (Figure 6).

However, brands who aren't in retail can also utilize metadata to personalize customer messaging. For contrast, let's look at how a food delivery service like DoorDash can offer email recommendations using metadata (Figure 7). Based on a user's delivery address, DoorDash can pull real-time data to personalize an email with offers from local restaurants in their database.

However, it's easier said than done to incorporate metadata into a brand's personalization strategy. Sometimes the data required to personalize a customer message is managed by another team, or is unorganized in a distant database. That's why utilizing metadata puts brands at a Level 3 on our Personalization Maturity Model.

Now that we've covered the four data types to create dynamic content, let's go over some must-have tools for building an advanced personalization technology stack.

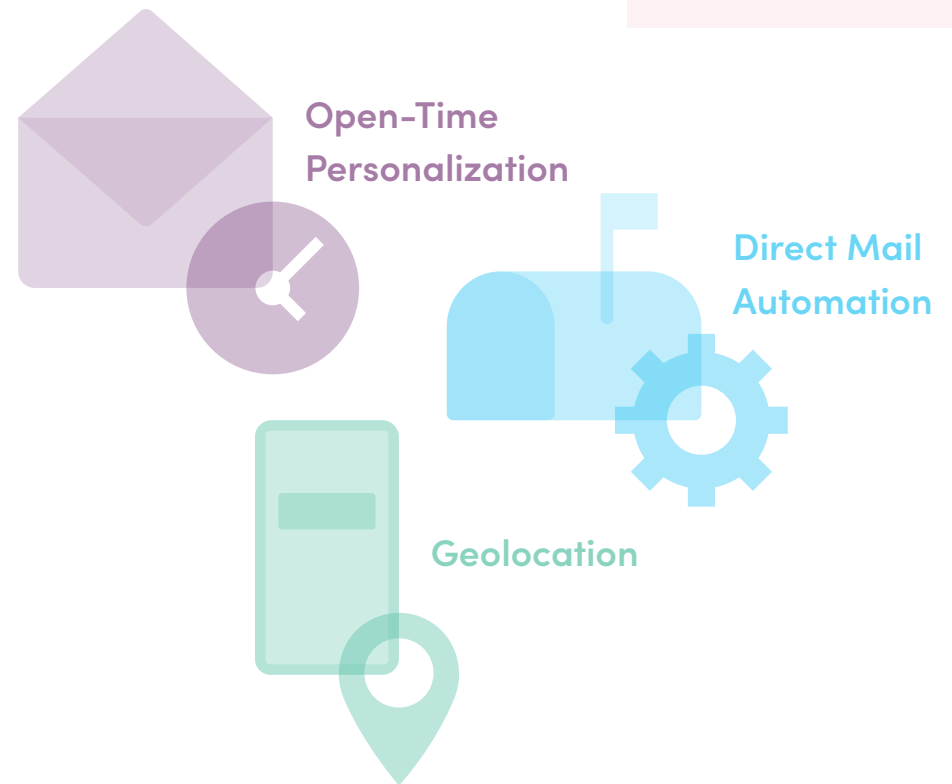
# Three Must-Have Tools for Building an Advanced Personalization Technology Stack

Once a marketer acquires the data types you need to create dynamic content in your emails, now the fun part begins: Advanced personalization.

There are tons of technology tools out there to enhance your customer messaging strategy, but here are three we recommend to make the biggest impact. They include:

1. **Open-Time Personalization**
2. **Direct Mail Automation**
3. **Geolocation**

Let's go over each of them, one by one.



# Open-Time Personalization

Open-time personalization is exactly like it sounds. Instead of personalizing an email based on the most recent information held in a brand's database, the content of the message changes when the user opens a message in their inbox or mobile device.

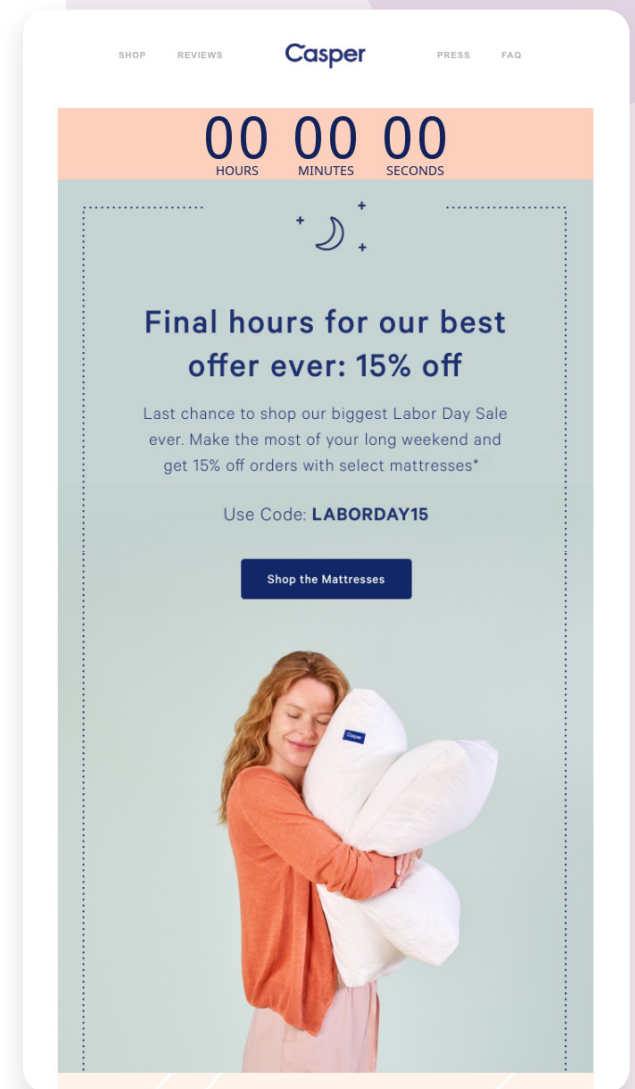
Examples of open-time personalization include elements like countdown timers, like in this email from mattress retailer Casper (Figure 8). While a marketer at Casper could schedule an email three days before the sale ends, the customer may not open the message until after the sale ends.

Using open-time personalization in the form of a countdown timer ensures that the time left to shop the sale is accurate, regardless of when the customer opens the email. Marketers can add countdown clocks to their emails using tools like [Kickdynamic](#), [Movable Ink](#), [NiftyImages](#), or [Sendtric](#).



*Marketers can easily achieve individualized emails that include personalized images, device-specific CTAs, weather and location-based content alongside individualized product or content recommendations. All content needs to look pixel-perfect and update live based on site behavior and product availability.*

– Jordan Sawyer, Head of Account Management, Kickdynamic



**Figure 8:** Mattress retailer Casper uses an open-time personalized countdown timer to promote its Labor Day sale.

Source: [Really Good Emails](#)

# Direct Mail Automation

If you pitch junk mail into the recycling bin every day, you may be thinking that direct mail is an outdated marketing channel. However, it can work wonders if paired with a digital channel like email or mobile push. To demonstrate, let's look at an example of a customer re-engagement postcard sent by NatureBox, a food subscription service (Figure 9).

According to [Carly Coleman](#), NatureBox's Director of Retention, the team had issues getting repeat customers. So instead of bombarding them with more digital campaigns, NatureBox utilized a direct automation tool to send postcards directly from their email service provider.

The result? A [60% lift in revenue per customer](#). So yes, direct mail does still work, especially when it's combined with an email or mobile messaging workflow. Luckily, we growth marketers have options beyond a one-off direct mail service. Direct automation tools like [Inkit](#), [Lob](#), or [Poplar](#) help brands send postcards that complement the digital messaging workflow, not compete with it.



*Direct mail automation allows you to send hyper-targeted campaigns at exactly the right time based on an individual's events or actions that you know they have taken. The result is a much more personalized, meaningful, and authentic experience that ultimately helps build loyalty.*

- Michael McCarthy, Founder & CEO, Inkit

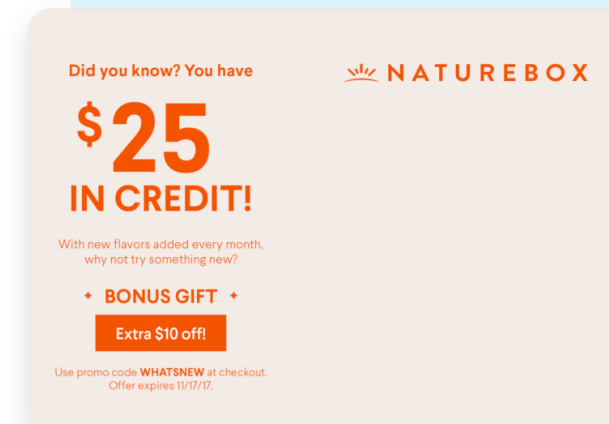


Figure 9: Food subscription service Naturebox uses direct mail automation to re-engage customers.

Source: [Inkit](#)



# Geolocation

If your customers interact with your brand mostly through their mobile device, utilizing geolocation can help you personalize messages that increase customer engagement.

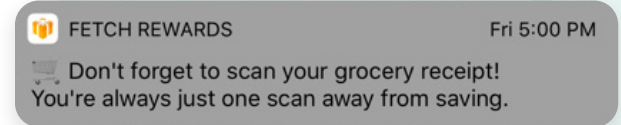
As an example, let's look at the mobile push notification Fetch Rewards sends to their members on their typical grocery shopping day (*Figure 10*). While the message above doesn't look personalized, Fetch Rewards is actually using geolocation to determine when a user is entering or leaving a retail location, as well as when they arrive at home.

Similarly, grocery delivery service Instacart sends an automated mobile push notification when a driver is en-route to a customer's address (*Figure 11*). Luckily, there's no reason to build a location tracker from scratch. If you're a growth marketer thinking about using geolocation as part of your personalization strategy, test out using a tool like [Radar](#) or [Foursquare](#).

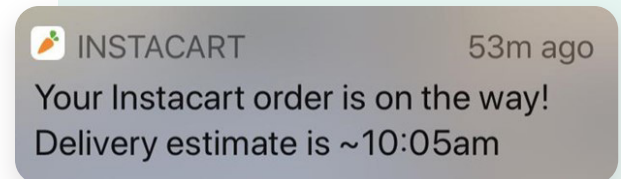


*Personalizing your content by location connects your brand's digital experience to the physical world. From building location-based features with in-store mode to using real-time ETAs to power order-ahead, we're seeing the smartest retail and QSR leaders leverage location to deliver highly relevant and convenient experiences to their customers.*

– Coby Berman, Co-Founder & COO, Radar



*Figure 10: Mobile app Fetch Rewards uses geolocation to personalize their customer push notifications.*



*Figure 11: Grocery delivery service Instacart uses geolocation to personalize their mobile push notifications.*

# Now, a Recap on Dynamic Content

Most brands aspire to personalize messaging to their customers as much as possible. However, those efforts may be hampered by a common issue: access to data.

However, growth marketers can individualize emails and mobile messages using dynamic content if they can acquire at least one of the four types of data:

1. **User Attributes**
2. **Event Data**
3. **External Data**
4. **Metadata**

And once a brand is ready for an advanced personalization, growth marketing teams can enhance their technology stack with three of our must-have tools:

1. **Open-Time Personalization**
2. **Direct Mail Automation**
3. **Geolocation**

*Now that you know the types of data you need to create dynamic content in your brand's emails and mobile messages, where do you think your brand falls on our Personalization Maturity Model? [Take the quiz to find out.](#)*

# About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility. Leading brands, like Zillow, SeatGeek and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.



## 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.

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