



# 4 Steps to Make Individualization Seem Like Magic



# Contents

|  |                         |    |
|--|-------------------------|----|
|   | Introduction .....      | 3  |
|   | Segmentation .....      | 4  |
|   | Lifecycle Mapping ..... | 9  |
|   | Journey Building .....  | 14 |
|   | Dynamic Content .....   | 21 |
|   | The Grand Finale .....  | 28 |
|  | About Iterable .....    | 30 |





# Introduction

Is this your card? No? How about this? ...Still no? A magician botching a magic trick rates pretty high on the cringe scale. It's uncomfortable and destroys any interest you have in seeing what else they can do.

The same thing happens when a brand sends customers marketing messages hoping—but not knowing if—they'll be relevant. You're in the market for dresses? No? Shoes? ...Still no? Equally as cringeworthy.

Today, customers have high expectations when it comes to the marketing messages they receive. They want to feel like brands care about them as an individual, not a data point. This is why individualization is the path

forward for marketers, not just the standard personalization we've all been shooting for.

**Luckily, it only takes four steps for your brand to make individualization seem like magic:**

- **Segmentation**
- **Lifecycle Mapping**
- **Journey Building**
- **Dynamic Content**

Why individualization and not personalization? With so much customer data and a variety of powerful marketing tools available, brands should be able to create customized marketing campaigns on an individual level.

While individualization isn't as easy as waving a magic wand, the end result can be so seamless it seems like magic for the customer. With this guide you can add a little "abra-cadabra" to your marketing messaging.





# Segmentation

Your audience is at the heart of your individualization efforts. After all, individualization is about creating an experience unique to each customer. To do so, however, you need to first start with segmentation. Understanding your audience and dividing them into similar groups—based on available data—gives you the ability to easily add some baseline individualization into your marketing messaging.

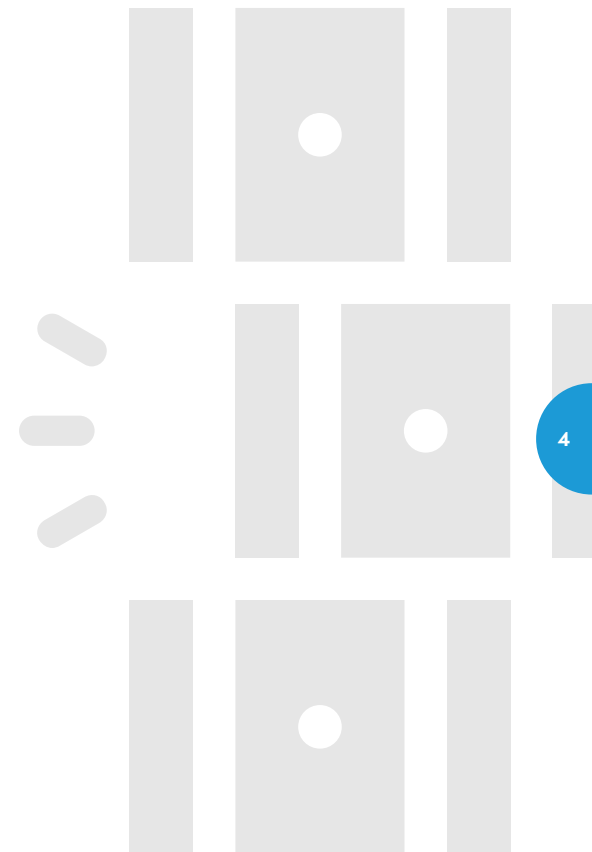
## Watch Traditional Segmentation Strategies Transform!

Since we're trying to get to individualization, let's start there... at the individual. Let's use the example of a 35-year-old customer buying a toy for a child. They discovered the toys through a quick online search, purchased a toy and received a follow up coupon prompting them to add their child's birthday to their profile.

Except, the customer doesn't have kids. They were buying a birthday gift for a friend's child.

Brands often make assumptions based on what customers have done in the past, not where they would like to go in the future. With traditional segmentation strategies, this customer would likely continue

receiving irrelevant messaging about a child they don't have. To break old segmentation patterns and build the audience your brand wants, you need some new tricks.



### 3 Tricks for Better Segmentation

There's a popular process called the [4 Disciplines of Execution framework \(4DX\)](#), developed by FranklinCovey, that helps you execute your strategies more effectively. Ideally, after adopting the four disciplines into your processes, you have an actionable how-to plan. Well, we said we wanted you to feel like individualization is waving a magic wand, so we've waved our own wand and condensed the four disciplines into **three** tricks you can start using today.

#### REFLECT AND VISUALIZE YOUR IDEAL

**AUDIENCE:** Instead of trying to come up with a comprehensive segmentation strategy for your entire database, **reflect and visualize what your ideal audience looks like.**

Here's the catch: just choose one. Otherwise, you'll get caught up in accomplishing everyday tasks, which [FranklinCovey refers to as "the whirlwind."](#)

Your ideal customer may be a new market segment. It could be a set of existing customers that you're rolling out a new product to. Whoever it is, make sure you're clear on who you're trying to attract to your brand and why.

Once you have a good grasp on who that ideal customer is, look into **what your team is currently doing with segmentation that gets you closer to your ideal customer.**

For example, [Curology](#), a personalized skincare brand, creates custom events for any customer data point, including whether members have uploaded a recent photo of their skin's progress.

Those who haven't are segmented and sent a [targeted SMS message](#) that reminds them to send a photo update and explains why it matters. Most importantly, members are able to snap a selfie and respond directly to the text—dramatically reducing the friction in patient-to-provider response rates.

Curology's segmentation becomes even more sophisticated during the customer journey. Email follow-ups are triggered automatically if members haven't shared a photo in a certain number of days.

These strategies, amongst others, resulted in [customer engagement increasing by 26%](#) and revenue increasing by 10%.

Your ideal audience is engaged. As Curology shows, once you've identified that audience, it's important to find the right interactions to add value to their experience.



**SELECT YOUR DATA POINTS:** After you've determined the ideal audience you're looking to attract, the next step is to **select your data points**.

Marketers can choose from [three types of data](#) to create their segments:

- **Demographic Data.** "Who are your subscribers?" Demographic data includes gender, age, location, and marital status.
- **Lifecycle Data.** "When will they convert?" Brands who use lifecycle data want to know which stage of the sales process each of their customers is in.
- **Behavioral Data.** "What are they doing right now?" Behavioral data focuses on what's happening on your website or mobile app.

The types of data chosen will depend on the ideal audience you're trying to attract. For example, UK-based real estate and rental marketplace, [Zoopla](#), [leans heavily on demographic data to fuel growth](#). In contrast, [online education platform Creative Live](#) has a preference toward behavioral data to segment and engage new user signups.

It's important to note that while it may seem that more data is better, the data may be old, outdated, or incorrect. That's why being able to update your data in [real-time](#) is a game changer for individualized segmentation.





**BUILD AND SEND A TEST CAMPAIGN:** After selecting data points to create a segment, marketers need a way to generate results to verify if they are targeting the right people. To do so, **build and send a test campaign.**

When designing a test campaign, think of what takeaways you can learn right from the get-go.

- Start by **defining the key performance indicators.** What metrics will tell you the test was a success? What numbers are you hoping to see?
- Then, **put thought behind the templates** you can create. With drag-and-drop template builders, you can easily put together a campaign that houses all of the information you want to share with your segments.
- Next, you test! You're not going to pull a rabbit out of the hat on the first try—and that's ok. That's what **A/B testing** is all about. Figure out which messaging resonates and which layouts influence higher engagement levels. Now's the time to think outside the box.

Once you've built and sent your test campaign, it's time to **evaluate the results.** If you plan to go through the steps of segmenting your audience, make sure to consistently report on your progress to understand whether your test campaign is reaching the right people, or if you should try another audience segment.

Remember not to overthink this step too much. At Iterable, we're believers in the [minimum viable campaign](#), so create something that you can iterate and improve on with later versions.

## A Recap on User Segmentation

Before you can run, you have to walk. And before you can individualize your marketing, you need to start segmenting your audience. Thanks to modern marketing technology, brands have more than enough data to create meaningful, granular customer segments beyond age, gender, and occupation.

By adapting the three tricks of better segmentation into your strategies, you'll be able to identify each audience member as an individual and market to their experience, taking the guesswork out of communication.

Now that you have a better understanding of modern segmentation, how are you going to start building your brand's perfect audience?







# Lifecycle Mapping

Lifecycle mapping is a lot like trying to read your customers' minds. It's an exercise meant to help marketing and sales teams understand how the customer interacts with your brand. But, rather than a crystal ball leading lifecycle map creation, it's a lot of logic-based and data-driven predictions.

With lifecycle mapping, you can plan for the future. You can determine what steps you expect your customers to take, based on past actions and other customer experiences, so you can meet them where they are with individualized marketing messages. Sure, you may not always guess correctly—we can't all be [Carnac the Magnificent](#)—but that just provides more learning and data collecting opportunities.



## How a Lifecycle Map Compares to the Customer Journey

If lifecycle mapping is the prediction, the customer journey is the outcome. Sales and marketing teams can only make educated guesses as to the path a customer will take, but the reality of how a customer interacts with your brand is their customer journey.

This may not be how everyone thinks about lifecycle mapping and customer journeys, but it works for us. In fact, it adds clarity to cloudy concepts. To simplify, this section will focus just on building a lifecycle map as a great way to navigate the various ways a customer can find your brand.

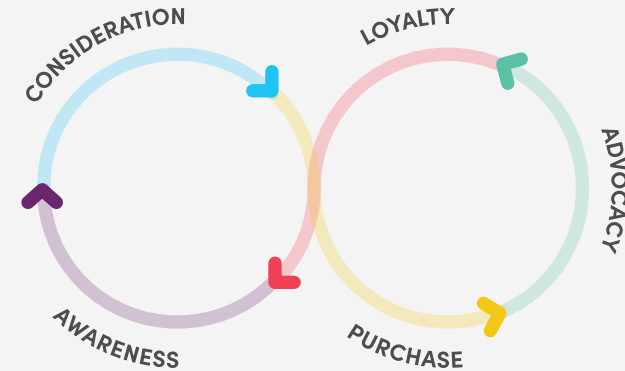
## 5 Tricks to Building a Lifecycle Map

A customer lifecycle map features the stages that, as marketers, we're all familiar with: **Awareness, Consideration, Purchase, Advocacy, and Loyalty**. Oftentimes, however, we see these stages organized in a funnel—awareness at the top and loyalty at the bottom.

Ah, wouldn't that be nice. If customers connected with your brand in a linear, highly-organized way. That's not the case though, is it? At least not the majority of the time. The road is a bit...winding.

Each customer is different. To develop an individualized marketing strategy, your team needs to plan for the chaos and design a lifecycle map that accounts for an infinite number of possibilities—it's not a funnel, it's a cycle.

Unlike a rigid funnel, our lifecycle map depicts how customers flow in and out of the different stages. Let's take a look at each stage, how they connect to other stages, and why this new format can help accomplish individualization.



### AWARENESS:

- Digital Ads
- Print Ads
- Word of Mouth

### CONSIDERATION:

- Search
- Email
- Paid Content

### PURCHASE:

- Store Purchase
- Online Purchase
- App Purchase

### ADVOCACY:

- Reviews
- Social Media Mentions
- Forums

### LOYALTY:

- Newsletter/Blog Subscription
- Rewards Programs
- Customer Support

**AWARENESS:** Yes, we're starting with awareness—shocking, we know. But, because we're ditching the over-used funnel, keep in mind that awareness isn't always the very first interaction a customer may have with your brand. Context is key.

A customer could be just learning about your brand, as a whole, via a billboard on the highway or a TV ad, but they could also be in a pinch and need to buy a present. They do a quick search and buy what fits without noticing the brand name. Awareness is about building a foundation of...well...awareness. It's ensuring the new customers know who you are and those not-so-new customers can learn more about you.

**CONSIDERATION:** The consideration stage is where individualization has the power to cast a spell over your customers. As customers are contemplating your new product, or even shopping with your brand for the first time, providing customized messaging can move the needle towards a purchase.

Let's say you're a shoe retailer and a customer is interested in learning more about your brand but hasn't made a purchase in the past. They find your site via search and, to get more info, sign up for your newsletter. Then, they poke around and click on the sneaker category. The customer leaves your site, still not sold on your brand—but considering a purchase.

Now's the time to use what you know about the customer to serve up individualized marketing messaging. The goal is informing the customer enough they move from consideration to purchase.

**PURCHASE:** The purchase stage is all about location, location, location. Where did the purchase take place and how can you use that information to further your individualization efforts? Consider the various choices a customer has to make a purchase: in-store, online, or through mobile devices.

The purchase is a win, but it isn't the end of the lifecycle. Even in a funnel, a purchase is only about halfway down. After the purchase, the goal should be to continue your customer relationships by turning those who have purchased into brand advocates.

## Fiit

To effectively capitalize on their expanded addressable market and deliver an experience that would retain those users for the long haul, [Fiit.tv](#), an on-demand fitness brand, used Iterable to test their onboarding sequence across email and mobile push notifications to optimize for conversions.

By leveraging Iterable's cross-channel Experiments and Studio, Fiit.tv tested both content and timing of touchpoints to determine what drove users to complete their first class within the first five days, and ultimately provide the highest trial-to-paid conversion performance. After testing, Fiit.tv increased conversions from new user onboarding by 15% and first-day activations by 12%.



**ADVOCACY:** Brand advocacy is what—hopefully—happens after a customer makes a purchase. Through tools like surveys, forums, and customer testimonials, your brand should aim to collect the sentiments of your customers and use those insights to drive not only additional purchases from that individual, but other, new customers as well.

Using brand advocacy—a.k.a. [peer-to-peer marketing](#)—can help individualize a customer experience because it's relatable. A brand is obviously going to gush about the benefits of their products and services, but a real customer talking about a product brings a new level of authenticity to your marketing efforts. In fact, [91% of people](#) regularly or occasionally read online reviews, and 84% trust online reviews as much as a personal recommendation from a friend.

The key to unlocking advocacy as part of an individualized customer experience is knowing who each customer wants to hear from—usually a member of your ideal audience. You then know who to target for testimonials, reviews, etc. and can use those assets to market to like-minded individuals.

**LOYALTY:** Brand loyalty means that, when researching competitors, this customer will still choose to shop with your brand—they're loyal to you.

Some techniques for creating loyal customers include rewards programs, positive customer support experiences, and getting customers to subscribe to your email newsletters. But, to create an individualized customer experience for loyal customers, you have to be able to tailor each technique for each customer.

With loyalty programs, for example, offering points on purchases that are relevant to the individual can help establish and maintain a customer relationship. Take the Starbucks Rewards program. If the customer consistently gets a grande iced coffee, maybe they receive rewards on iced coffees. Or, maybe a reward on a food item that pairs well with an iced coffee.

Moral of the story? There's no shortage of customer data. Throughout various stages of the customer lifecycle you can collect information and use historical data to craft a unique, individualized experience that keeps them coming back for more.



People shop with you or use your products because of *how* you help solve a problem and deliver experiences, not just because you *do* it. Your largest advantage is the data you collect and how it drives decisions. Make sure user behavior drives your actions, analyze what they do and do not accomplish, and actively nurture them through automated workflows. Finally, make sure your data is clean, uniform, and easily actionable across tools to execute a successful loyalty program.

[Josh Lloyd](#)  
Managing Director





## A Recap on Lifecycle Mapping

Customers can bob and weave in and out of various stages in the customer lifecycle. It may seem like they're there one second, and gone the next. But really, this is how the modern customer shops. Like we said earlier, the funnel is organized, linear, and straightforward, but that's not a realistic depiction of the customer lifecycle.

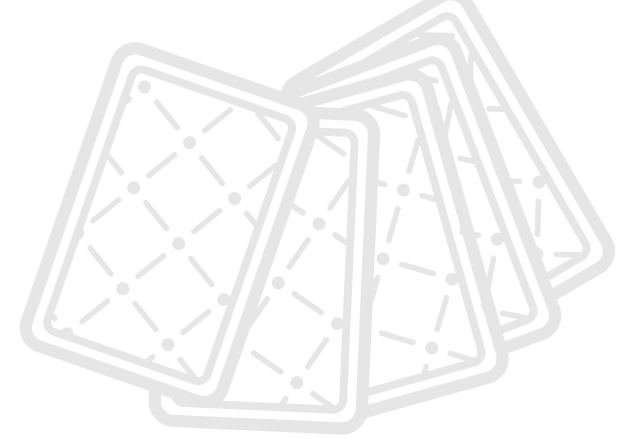
The customer is a ball and the lifecycle is a set of moving cups. The customer is somewhere in there but it's your job, as a marketing magician, to keep your eye on the customer so you can deliver an individualized experience regardless of lifecycle stage.



# Journey Building

Lifecycle and journey can often get conflated. At Iterable, lifecycles are the stages where customers can connect with your brand. The customer journey, on the other hand, focuses on guiding the customer, using various touchpoints, to the next stage as they interact with your brand.

To start building a journey, you have to determine the goal of the journey (purchases, subscriptions, sign ups, etc.). However, there isn't a singular journey every customer must take with your brand. That's why journey building is crucial for creating an individualized marketing strategy—**every customer's path is different.**



## The Four Tricks to Building a Customer Journey

While lifecycle mapping is accounting for what *could* happen, designing a customer journey is what *will* happen, depending on certain actions the customer takes. Think of it as a “choose your own adventure”—or pick a card, any card—for your customers. No matter the path they choose, you've designed a journey to take them to the next step.

In paving these paths, there are four tricks to consider when building a customer journey.

1. **Enter/Exit Criteria**
2. **Timing and Cadence**
3. **Actions**
4. **Filters**



## Enter/Exit Criteria

For our first trick, we start at the beginning...and the end. More specifically, how a user enters and leaves the customer journey. Let's say you have a new email subscriber. You notice their entrance point is email, but the desired exit point is to download the app and engage there where you see better conversions.

At this point, your journey begins at subscribe, continues through various touchpoints encouraging app download, and concludes at that first app engagement.

Think of the enter/exit criteria as the ticket taker at the magic show. With certain criteria—like your seat number and row—the ticket taker will lead you to a specific section of the theater. That's exactly how a customer journey should work. With specific criteria—an action like downloading an app—the customer is led to a specific customer journey that has a desired result or exit point.

But when the user enters and exits these journeys is entirely up to them. That's where you have to take timing into consideration as well.

## Timing

You've probably heard the old expression "timing is everything." Well, in marketing this means the send time of messages sent and the delay between them. This holds true in customer journeys as well. **Timing can make or break a customer experience.**

**SEND TIME:** Customers aren't constantly refreshing their inboxes, hoping to get a marketing email. Determining when a customer should receive a specific marketing message and the time between messages can impact the success of the customer journey. Brands need to be realistic about how and when customers will interact with their messages and identify the opportunities for the most engagement.

**DELAY OF MESSAGES:** The time of day is important for engagement, but the time in between messages is equally important when considering retention of customer attention spans. The best we can hope for as marketers is to stay top of mind for our customers whenever possible. A delay that's too long can lose the attention, while a delay that's too short can become a nuisance. Analyzing your engagement rates can help determine the optimal delay period.

Timing can seem complex, but a feature like [Send Time Optimization](#), which looks at each customer's level of engagement within the journey and selects the time based on past campaign performance and user behavior, can individualize a customer experience while making a large impact on your brand's bottom line.



[Imperfect Foods](#), a food delivery subscription service, takes timing very seriously. Customers are given a certain window of time (48 to 72 hours) to shop for their produce. The company sends a triggered email to those customers in the shopping window to remind them to pick their produce. Better timing of this initial email resulted in [engagement from 40% of their customers](#).

The day after the shopping window has begun, Imperfect Foods can see which customers customized their orders and which didn't. Understanding that customers who did not customize are not going to respond to a second message immediately, Imperfect Foods triggers a delayed second email and SMS message to those customers who haven't customized—this time, with more urgent messaging. After the combination of messages on day one and day two, Imperfect Foods saw a 67% engagement rate with over 85% of orders customized each week.



## Actions

For the third trick, we focus on the actions you can take as a brand with a journey to make sure it's hitting the right channels, users, and lists. Without these three actions in place, your journeys run the risk of losing relevance at the individual level.

**SEND ACTIONS:** Send actions pertain to how you're sending your messages. Traditional legacy martech platforms and ESPs only enable email journeys, but modern platforms like Iterable give marketers the chance to add other channels to their toolset like in-app, push, SMS, web push, and more.

Sometimes, simpler is, in fact, better. Don't overdo it right away and inundate your customers on every device at all times. Start with email and incorporate other channels after observing audience behavior. You should cater channel usage to customer behavior, rather than adding them because you can.

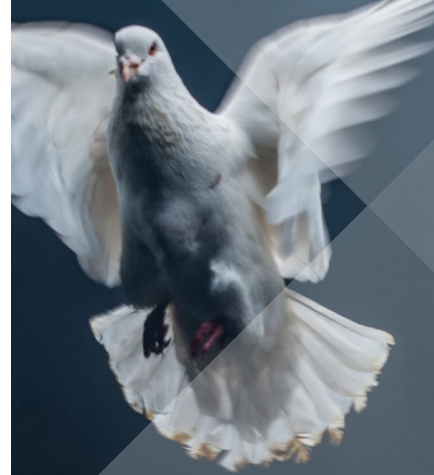
**USER ACTIONS:** The second core action is maintaining current user profile information. When users complete an action, such as completing a purchase or using a discount code, this information should be automatically updated to better inform that user's inclusion in future journeys.

Based on these actions, you can better identify which journeys make sense to include or remove users from, how their contact fields are changed, and in general how to update customer profiles.

In keeping track of this and making sure changes are made in real time, you can monitor which journeys are working, identify what your most valuable customers are doing, and evaluate how to iterate and improve underperforming journeys.

**SUBSCRIPTION ACTIONS:** The final action is related to list cleaning. Essentially, we recommend keeping track of subscriptions constantly and understanding how to add or remove users from receiving communications. This goes beyond opt-in and opt-out lists.

Where many marketers trip up is identifying customers who no longer engage with or open messages. Monitoring engagement levels can help reflect a more accurate assessment of a journey's success and inform journeys that are a better fit for disengaged users.



## Filters

The fourth and final trick of journey mapping is filters. **Filters decide which users move to the next step of the journey**, depending on criteria that you designate. There are three ways to filter users through a journey.

**FIELDS MATCH:** To explain how fields match work, let's say you're a subscription box brand and assume a customer signed up to receive notifications about customizing their monthly subscription box, scheduled to be auto-purchased in April. We'll call this user Sophia.

However, Sophia hasn't customized a box from your brand since January, which puts her in the at-risk category to trigger a reactivation workflow. Without fields match, she's likely to receive both campaigns—customization and reactivation—independent of each other, which is confusing from a user experience perspective.

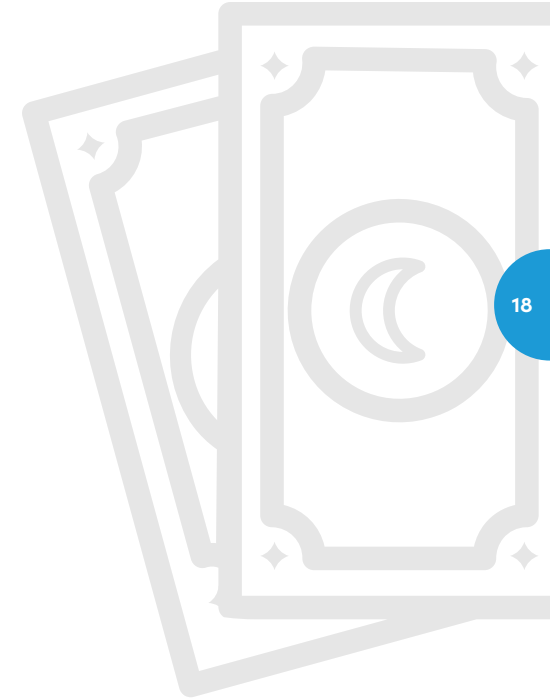
If your brand used an attribute like fields match, then a filter can prioritize the notification journey and hope that Sophia will use the reminder to make a purchase, effectively removing herself from the at-risk category. If Sophia doesn't make an order, she can be placed into the reactivation workflow to see if an incentive will prompt her to make a purchase.

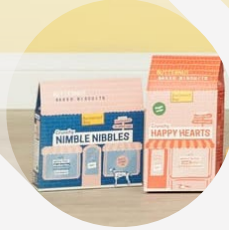
**A/B SPLITS:** Maybe your team can't decide on a design template or when a user should receive a particular journey. While most marketing automation software allows for basic A/B testing of your journeys, Iterable, in particular, enables marketers to split their audience up to five ways.

We recommend most brands start with basics if they are new to using A/B splits, though. Let's say your brand struggles with open rates for its reactivation journey—particularly the first email. If we were marketers on that team, we'd analyze the data we have, decide whether it's timing or copy related, and then test and iterate on one variation first—such as the subject line or time of day—before considering others.

**FIELD SPLITS:** The last filter is more related to user profile information. In the instance of field splits, your brand is individualizing content based on specific user information. Take our subscription box example, if Sophia selects a certain preference, like being vegetarian, we can update imagery in her emails to more closely reflect this.

Meanwhile, Michael, who selects dairy-free as a preference, would receive a similar reactivation journey, but with content related to his preferences. Splitting based on user profile fields personalizes the content in a way that feels individualized for the user and encourages further engagement to continue the journey.





## Iterable Case Study

# Butternut Box

European dog food delivery service [Butternut Box](#) found that brand ambassadors—in this case, dog-related businesses—are hugely helpful in garnering new customer referrals. To keep these high-value ambassadors engaged, Butternut Box designed an ambassador-specific activation journey.

First, Butternut Box scans their membership list to see which ambassadors have both not

referred in the past 60 days and aren't new ambassadors. Then, those ambassadors will receive a reminder email, using send-time optimization.

If a week passes with no action from the ambassador, a new campaign is triggered. This campaign uses a field split to send a nine-email sequence to non-breeders (breeders get 11).

These campaigns have three stages, each with specific timing, and run for roughly 30 weeks in total:

1. **Ambassador Program Reminders and Referral Links**, runs for ~9 weeks
2. **Butternut Adding Value (e.g. why Butternut Box is the whole package)**, runs for ~7 weeks
3. **Community & Feedback**, runs for ~14 weeks (including 6-week delay for re-entry)

Since the journey went live in August 2021, over 40% of Ambassadors in the journey have since gone on to make at least one referral.



## A Recap on Journey Building

Marketing teams may have grandiose visions when building their journeys. However, vision doesn't always align with reality—especially if their marketing automation tool assumes the customer journey is linear and sequential. The key to building an effective journey, ultimately, is utilizing **Enter/Exit Criteria, Timing, Actions, and Filters** to engage with your audience in a dynamic and elastic way.





# Dynamic Content

Every marketer knows that [individualization is the secret sauce to getting more clicks, conversions, and revenue](#). The grand finale of individualization is dynamic content. That is, content that changes depending on the individual user.

By using different dynamic elements—like images, text, and user information—in your marketing messages, you'll be able to automatically individualize every single message that gets sent. There are four ways to make this happen.



## The Four Tricks you Need to Create Dynamic Content

Dynamic content brings [context](#) to your individualization efforts. In the past, marketing messages were often a swath of sameness. Every person received the same message, regardless of their interests, needs, or wants. Today, marketing has evolved. Dynamic content gives marketers the ability to change their messaging for each individual user with:

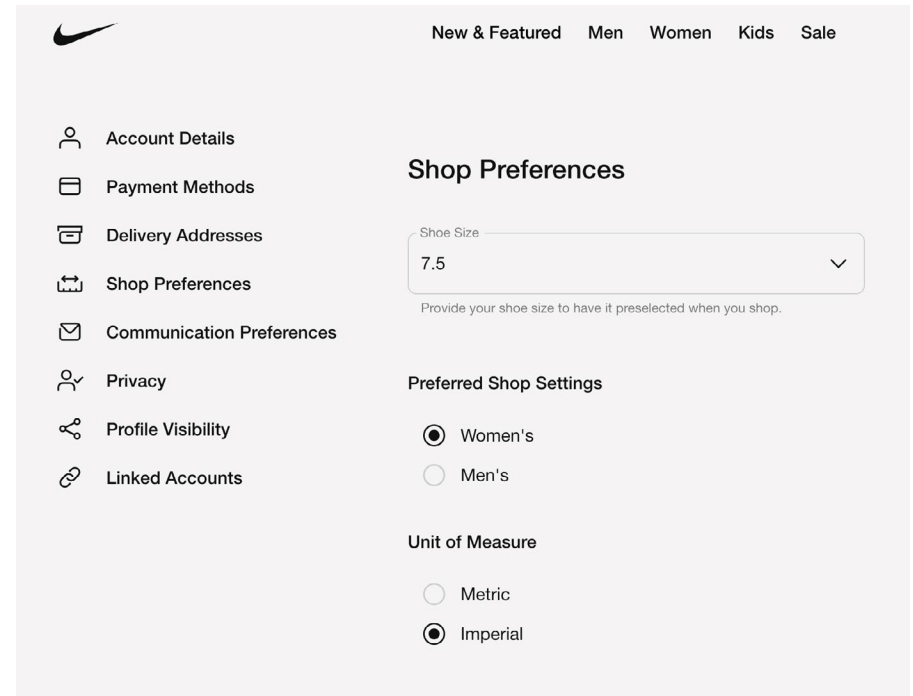
1. **User Attributes**
2. **Event Data**
3. **External Data**
4. **Metadata**

## User Attributes

User attributes are the demographic and personal information you have about each and every one of your customers. Think of information like their first and last name, birthday, email address, or anything found on [Manage Subscriptions or User Preferences pages](#).

User attributes can be used in subject lines or even body copy of messages. When you see your name in the subject line of a promotional email, that's a dynamic user attribute.

User attributes generally are the first, easiest step to dynamic individualization. They give you a chance to connect with customers right away. It's a good start, but can limit the amount of individualization you can achieve if you stop here.



Nike's preference page, for example, allows users to enter shoe size, shop settings, and units of measure. Source: [Nike](#).



## Event Data

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

So in the example from Nike on the previous page, it's great that a user can choose to receive emails about women's clothing. However, that profile becomes richer and more nuanced if Nike can pick up on the fact that the user is browsing through specific sneaker types and alter their marketing messaging accordingly.

Brands can also use event data to notify customers about milestones. For example, a congratulatory push notification based on the number of points accumulated by a user in a loyalty program.

## External Data

Data feeds aren't necessarily a data type, but they do add another dimension of individualization 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 this message from clothing retailer [Uniqlo](#).

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 an individualized touch to this message.

Another type of data feed you can use is a ticker or API to beef up your newsletters. Cryptocurrency exchange [Coinbase](#) reports on market performance of the top digital currencies in its monthly roundup email.

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



The image shows a weather forecast email template for Uniqlo. At the top, the Uniqlo logo is displayed in red. Below it, the location "Saint Paul, Minnesota" is shown. The date "03/07" and "TODAY" are followed by a large "50°" and a sun icon. A weekly forecast table follows, showing temperatures and weather icons for each day from Sunday to Saturday. The main headline "TRANSITIONAL WEATHER ESSENTIALS" is in large, bold, white letters. Below the headline, a promotional message 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 buttons: "SHOP MEN" and "SHOP WOMEN".

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

Uniqlo uses a weather external data feed to individualize their emails. Source: [Really Good Emails](#).



## Metadata

Finally, the holy grail. To take individualization even further, marketers should be utilizing metadata, which is defined as “descriptive information about your brand’s product or service offerings.”

In other words, it’s individualizing a message based on what a single customer is doing instead of 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 individualize a message to reflect such activity.

Food delivery service, [Caviar](#), can offer email recommendations using metadata.

Based on a user’s delivery address and order history, Caviar can pull real-time data to individualize an email with offers from local restaurants in their database.

caviar

Bite into the Week with Fastbite



Want the best dishes from your favorite places in SF at lightning speed? Whether you are stuck at your desk or binge-watching tv at home we'll bring you lunch or dinner for **under \$15, delivered in 15 minutes or less.**

Check out a few of our favorite dishes for this week, below. And **follow us on Instagram (@trycaviarsf) or Twitter (@trycaviarsf)** to get full daily menu updates.

And best of all, check in on Thursday for a special **mystery item** available at 11 am for lunch. **Trust us, you don't want to miss out on this one.**

Start your order

Try these items:



**Señor Sisig Burrito with Chicken:**

Grilled chicken, adobo garlic rice, pinto beans, lettuce, pico de gallo and our cilantro cream sauce wrapped in a tortilla.

**\$10.00**



**"The Workout" Asian Chicken Salad from Asian Box:**

Skinless chicken, extra steamed veggies, crisp bean sprouts, pickled veggies, herbs, finished with tamarind vinaigrette.

**\$9.00**

Caviar offers local restaurant delivery based on customer's previous orders. Source: [Really Good Emails](#).

## Three Must-Have Tools in Your

# Individualization Technology Stack

Before going on, it's important to note some other tools you can use to make dynamic content more impactful. While using a variety of data types can create dynamic content, how you obtain and use the data is important. Here are three marketing tools to consider as you begin to begin dynamic content.

**OPEN-TIME INDIVIDUALIZATION:** Open-time individualization is exactly like it sounds. Instead of individualizing an email based on the most recent information held in a brand's database, the content of the message changes depending on when the user opens a message in their inbox or mobile device. Think: countdown timers.

#### Our Recommendations:

- [Movable Ink](#)
- [Nifty Images](#)
- [Kickdynamic](#)
- [Sendtric](#)

**DIRECT MAIL AUTOMATION:** You may be thinking that direct mail is an outdated marketing channel, but it can work wonders if paired with a digital channel like email or mobile push.

Brands sometimes see issues getting repeat customers. So instead of bombarding them with more digital campaigns, some brands send postcards by integrating direct mail with their ESP and see massive uplift in revenue.

#### Our Recommendations:

- [Inkit](#)
- [Lob](#)
- [PFL](#)
- [Poplar](#)

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

We talk about marketing where the customer is. Well, geolocation is the best tool for doing just that, and contextualizing your marketing too. Be careful to use this transparently though to avoid creeping customers out.

#### Our Recommendations:

- [Radar](#)
- [Foursquare](#)

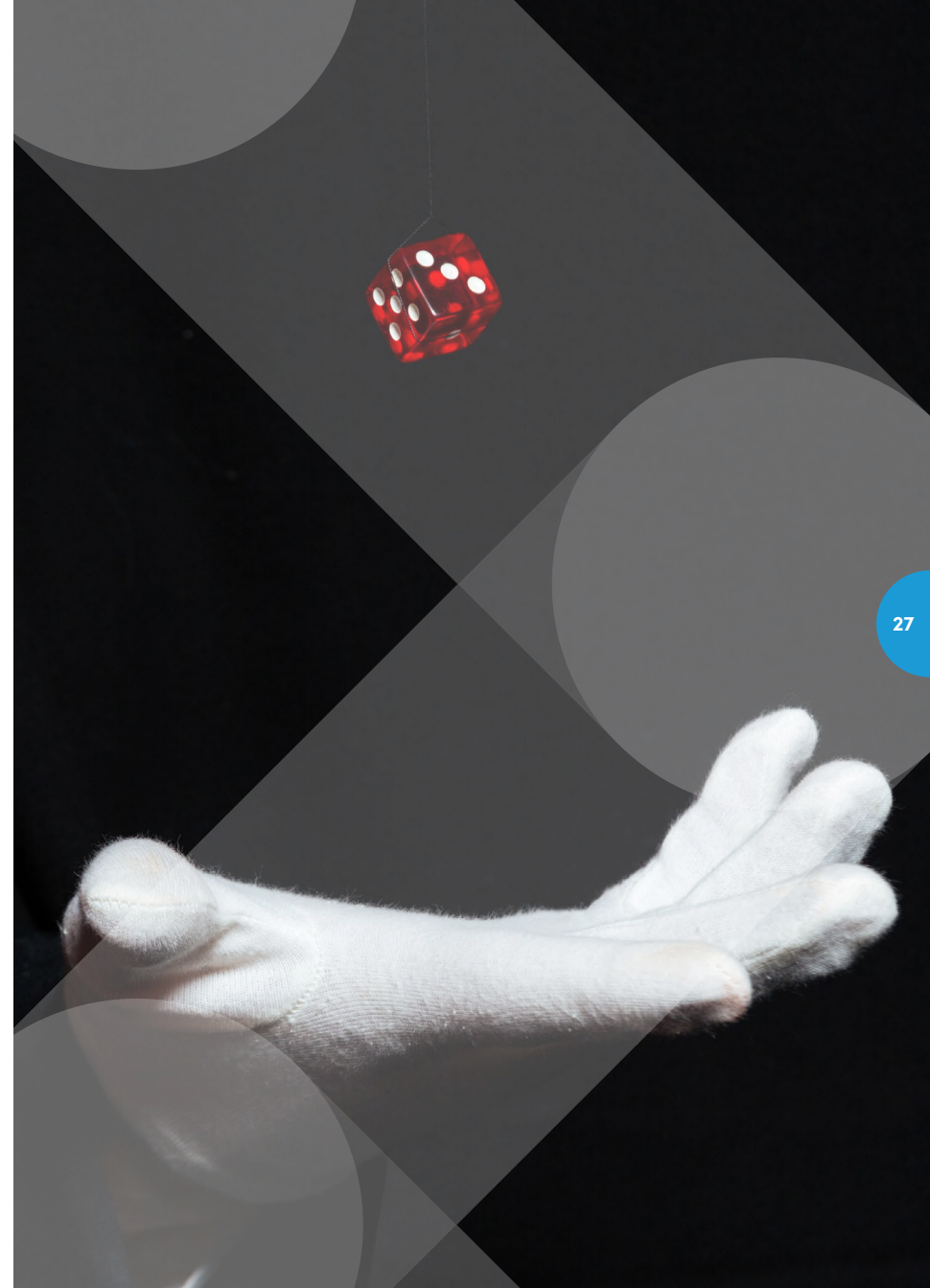


## A Recap on Dynamic Content

Most brands aspire to individualize messaging to their customers as much as possible. However, those efforts may be hampered by a common issue: access to data. The data doesn't have to be perfect—it likely isn't. But as long as you have *some* data, you'll be able to individualize emails and mobile messages using dynamic content. All it takes is at least one of the four types of data:

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

And if you're able to combine them, that's even better for you and your customer.





# The Grand Finale

That was a lot. All of that info may make individualization seem overwhelming, but really, we just want to equip you with all of the information you need to make your individualization efforts look—and feel—like magic.

First, we covered segmentation, which is all about knowing and understanding your audience as a first layer of individualization.

## The three tricks to segmentation:

- Reflect and Visualize Your Ideal Audience
- Select Your Data Points
- Build and Send a Test Campaign

Then, we reviewed lifecycle mapping where you lay out all of the possible stages a customer can have with your brand.

## The five tricks to lifecycle mapping:

- Awareness
- Consideration
- Purchase
- Advocacy
- Loyalty

Next, we covered journey building where you decide the path a customer *will* take when interacting with your brand.

## The four tricks to journey building are:

- Enter/Exit Criteria
- Timing and Cadence
- Actions
- Filters

Lastly, we dove into dynamic content which uses template fields to pull individualized content into your marketing messages.

## The four tricks for creating dynamic content:

- User Attributes
- Event Data
- External Data
- Metadata



By implementing these elements, you'll be able to develop highly individualized marketing campaigns that connect to each unique customer.

## A Peek Behind the Curtain

While individualization may look and feel like magic, it does take work. We mean that in the best way possible. It's not an unachievable, otherworldly undertaking—it's quite doable. Hopefully this guide served as a peek behind the proverbial curtain—giving away all of the magician's tricks—when really, you already have the data, you just have to activate it. Ta-da!

To learn more about data activation and individualizing your customer experience, [schedule an Iterable demo](#) today.

# About Iterable

Iterable is the powerful customer communication platform that helps organizations like Zillow, DoorDash, Calm, and Box to activate customers with joyful interactions at scale. With Iterable, organizations drive high growth with individualized, harmonized and dynamic communications that engage customers throughout the entire lifecycle at the right time.

If you want to learn more about Iterable, please request a demo.

[Request Demo](#)



## 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.

Trusted By:

 box

 fabletics

 Fender®

 SEAT  
GEEK

 STRAVA

 Zillow®