



How to Personalize Cross-Channel Campaigns Using User and Event Data

Personalization Maturity: Level 1



Introduction

Personalization is touted as one of the core tenets of cross-channel marketing, and for good reason.

Studies show that [91% of consumers are willing to buy from brands that offer relevant recommendations](#). And companies that provide an [emotional connection with customers outperform their competitors by 85%](#).

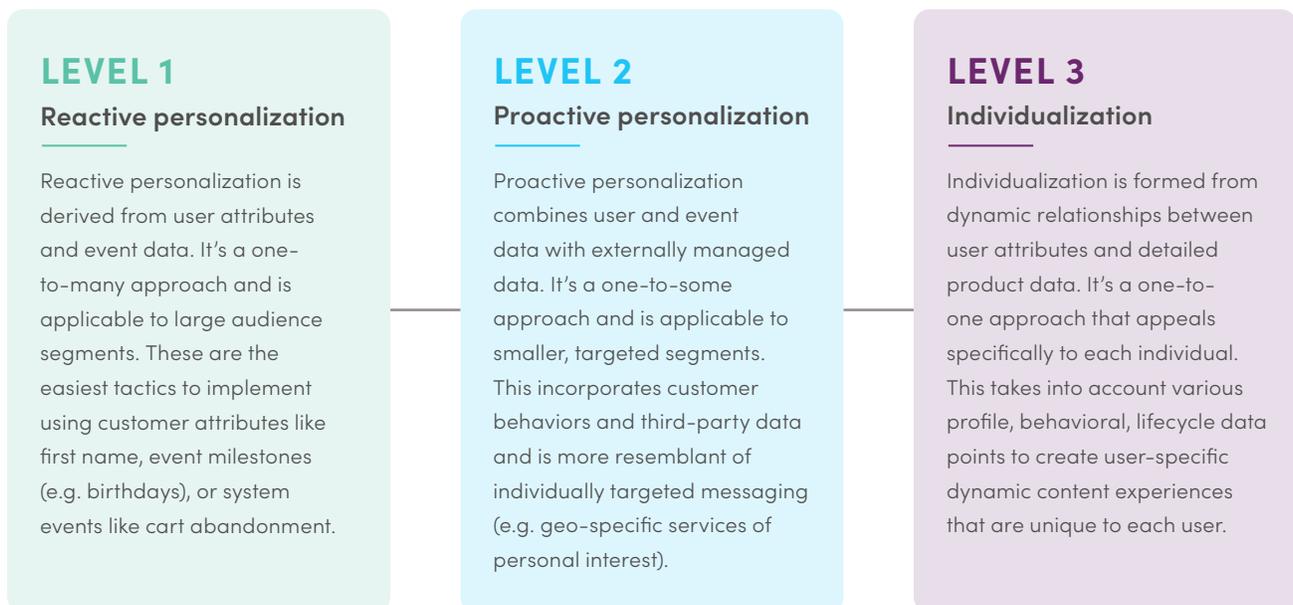
What's more, [72% of consumers say they only engage with personalized messages](#), further reinforcing the need for brands to deviate from the “spray and pray” approach to marketing.

But these numbers beg the question: **what's the driving force of personalization?**

As it turns out, the brainchild of personalization is user and event data. It's the knowledge that brands acquire when they land a front-row seat to their customers' subconscious minds to get to the heart of what they want (and give it to them when they want it).

As a B2C marketer, your goal is to establish a 1:1 connection with your audience throughout the lifecycle.

To get there, you must understand the foundation of personalization, broken down into three levels.



In this guide, we'll walk you through Level 1 of personalization. You'll learn what user and event data is and why it's essential, and you'll see some real-life examples of companies that understand the [art of personalization](#).

Afterwards, you'll be able to create highly personalized cross-channel campaigns that make your customers feel like they're VIPs.

What Is User and Event Data?

An Overview: A Treasure Trove of Customer Data

Simply put, [user and event data](#) is user profile information found in any modern email service provider (ESP) or growth marketing platform. A user's profile is their single source of truth for two main components:

1. **User attributes** (demographic information and personal characteristics)
2. **Event data** (actions, behaviors and engagement with messaging)

Together, these components give you a wealth of customer data at your fingertips—let's break each of them down into further detail.

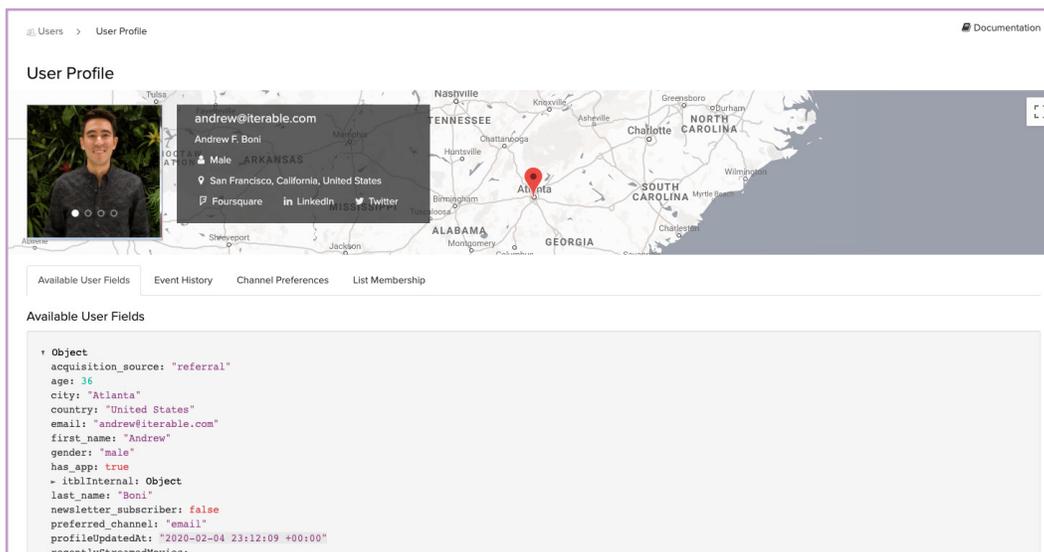
User Attributes: An Introduction To Your Customers

User attributes define who your customers are. Basic details—such as their contact information, geographic location, preferred communication channels, how and when they joined your website or app, and the devices they use—are all personal characteristics that shape their identities.

Attributes give you a holistic view of your customers, and they serve as a great starting point for dynamic personalization and segmentation.

However, user attributes are less frequently updated than other data types (it's not like most folks move or change phone numbers every month), so they alone can't offer you a more nuanced understanding of your customers.

This is where event data comes into play.



The screenshot displays a user profile interface. At the top, there's a navigation bar with 'Users > User Profile' and a 'Documentation' link. The main content area is titled 'User Profile' and features a profile picture of a man, a map of Atlanta, Georgia, and a list of social media links (Foursquare, LinkedIn, Twitter). Below the map, there are tabs for 'Available User Fields', 'Event History', 'Channel Preferences', and 'List Membership'. The 'Available User Fields' tab is active, showing a JSON object with the following data:

```
{
  "Object": {
    "acquisition_source": "referral",
    "age": 36,
    "city": "Atlanta",
    "country": "United States",
    "email": "andrew@iterable.com",
    "first_name": "Andrew",
    "gender": "male",
    "has_app": true,
    "itblInternal": {
      "Object": {}
    },
    "last_name": "Boni",
    "newsletter_subscriber": false,
    "preferred_channel": "email",
    "profileUpdatedAt": "2020-02-04 23:12:09 +00:00",
    "recentlyStreamedMovies": []
  }
}
```

A standard user profile holds basic basic information about your customer, such as their email address and how they signed up for your communications.

Event Data: All About the Behavior

Event data is activity-based information about your customers. Tied closely to [behavioral targeting](#), they tell a story about how your users interact with your brand, greatly enhancing your understanding of their changing interests and preferences over time.

With event data, you get a multidimensional view of your customers' behavior—ranging from broad to granular—throughout their journey.

Let's say, for example, that you're the owner of an e-commerce site. On a broad level, you would track message engagement events, such as email open and click-through rates, push open rates, and SMS response rates to determine which channels appeal to which customers the most.

If you wanted a more detailed perspective of their behavior, you would track external action-oriented events, such as items added to cart or purchased.

By understanding your customers' actions and behaviors, you can anticipate their needs over time. In turn, this allows you to create more targeted and precise campaigns.

Now that you know what user and event data entails, let's discuss how you can use this data throughout the five foundational stages of marketing automation:

1. Audience identification
2. Data integration
3. Campaign composition
4. Message personalization
5. Performance optimization

The screenshot displays a user profile for 'andrew@iterable.com'. The profile information includes: Andrew F. Boni, Male, San Francisco, California, United States. Below the profile is a map of the United States with a red pin on Atlanta, Georgia. The 'Event history' section is active, showing a table of events. The table has columns for Event Type, Time, Details, City, State, Browser, Device, OS, Raw Data, and Actions. Two events are listed, both 'Subscribed to' events for list creation on Mon, Jul 06 2020, at 7:51 pm and 7:50 pm, both in Atlanta. The page also includes navigation tabs for 'Available User Fields', 'Event History', 'Channel Preferences', and 'List Membership'. A search bar and pagination controls (20, 50, 100) are also visible.

Event Type	Time	Details	City	State	Browser	Device	OS	Raw Data	Actions
Subscribed to	3 months ago	List 596314: List created on Mon, Jul 06 2020, 7:51 pm	Atlanta	-					Show
Subscribed to	3 months ago	List 596313: List created on Mon, Jul 06 2020, 7:50 pm	Atlanta	-					Show

Your customer's event data is a chronological framework for their online activities and behavior.

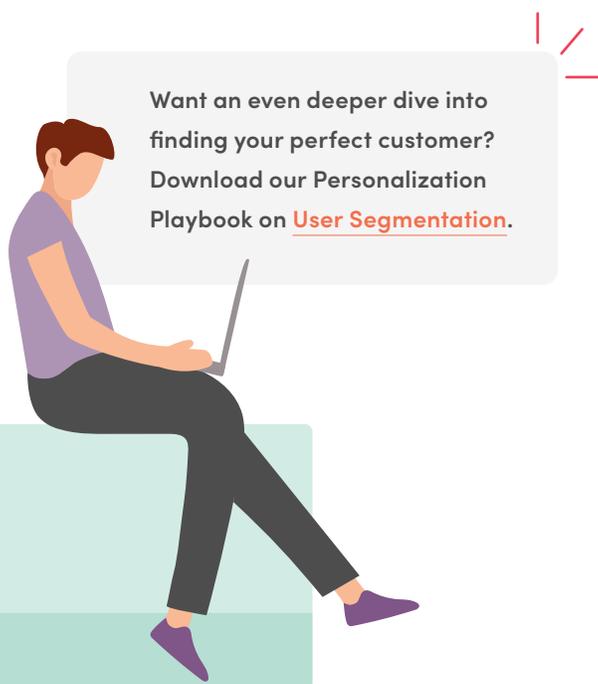
Stage One: Audience Identification

Knowing your target audience is the most critical step in the campaign building process. Whether you're creating a new email marketing campaign or revamping an existing one, you must understand who your customers are. Without a firm grasp of who you want to reach out to, your message will be unlikely to engage the right people at the right time.

A good place to start is by studying your loyalists' user profiles where you'll get a 360-degree view of their data in real time. As you go through layers of information, ask yourself the following questions:

1. What do they do?
2. What do they like?
3. How do they interact with the brand?
4. How can you convert more customers to act like them?

Once you nail down your ideal audience, create a dynamic list so you can send a message that resonates.

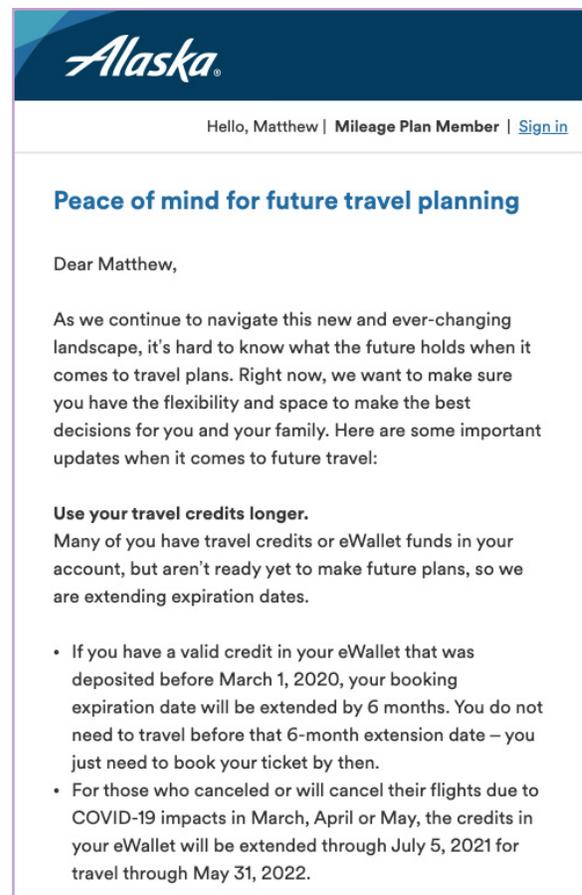


Inside Look: Alaska Airlines

Target Audience: Travelers with account credits

Situation: The travel industry has been one of the hardest hit industries in the wake of COVID-19. During these uncertain times, people were forced to cancel or delay their plans until it's relatively safe to travel again. For those with travel credits, their main concern was whether they could redeem their credits toward future bookings.

Solution: Alaska Airlines does a fantastic job of demonstrating compassion, flexibility and relevance in this email message. The body of the email explains how the airline is extending expiration dates, further reassuring those with account credits that they can safely rebook flights through 2022.



Inside Look: Spotify

Target Audience: Group of listeners that are considered the artist's top fans.

Situation: There's something to be said for getting the intel on the latest news about your favorite artist before everyone else. Spotify's data shows which listeners are considered the artist's top fans. With this information, the music streaming service can send an email campaign expressing gratitude for their listenership.

Solution: This thank you email does a great job of not only making the fans feel special, but it also highlights the value of exclusive merch. The offer code for this shirt/ticket bundle incentivizes fans to buy before the deal expires.



FANS FIRST

A message from All Time Low:

This year we were supposed to be on the road playing these songs with you guys every night. We're doing the next best thing and playing Wake Up Sunshine all the way through for the first time with a livestream on October 9th. We wanted to offer something special to our Spotify listeners so grab your exclusive shirt/ticket bundle and we'll see you at the show!

Use to the code **ATLFIRSTACCESS** and receive access to an exclusive t-shirt only for Spotify fans. Offer ends October 6th or while supplies last.

BUY TICKETS & MERCH

Mini Assignment #1:

- Find out where your team stores data.** Learn how the data is structured. After all, if you don't know where things are, how can you begin the process of building a personalized campaign?
- Get a panoramic view of your data.** The amount of information at hand can be overwhelming at first. But the more you familiarize yourself with it, the faster and easier it will be to find what you're looking for.
- Filter out the most important details** and apply that to your campaign.



So far, you've seen a couple of examples of brands that understand their target audience. You've also done your homework (hopefully!) and figured out who you want to reach out to. It's time to take that knowledge into the next stage: data integration.

Stage Two: Data Integration

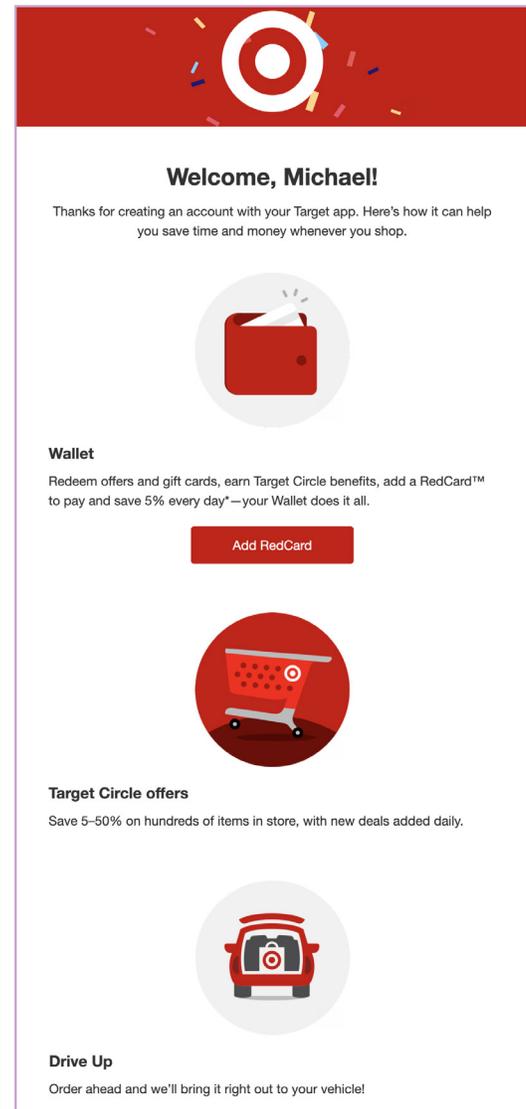
In this stage, it's all about context. You know who your customers are, but do you know where they're hanging out in the digital realm? Take stock of the arsenal of data at your fingertips to understand the big picture first. Determine which app or channel data you can glean from, and incorporate your findings in your campaign.

Inside Look: Target

Target Audience: Customers who created new accounts via the mobile app.

Situation: Target understands the importance of context when connecting with new customers, whether their first touchpoint is creating a desktop account, downloading the app or making a first purchase. The retailer takes this context into consideration in its welcome campaign, with dynamic content based on signup source.

Solution: Target sends a warm [welcome message](#) that focuses on the app experience for mobile-first users. The email [onboards](#) the customer by explaining how they can save time and money on the go, namely through its CTA that promotes the Wallet feature in the Target app. Overall, the message does a great job of illustrating convenience and cost savings to new subscribers.



Mini Assignment #2:

- Brainstorm a list of signup sources** and other user touchpoints that are critical to the customer journey (e.g. website, app, social media).
- Choose one source** you want to incorporate into your campaigns. Focus your attention there.
- Build out dynamic content modules** based on that added source to personalize messages by context.



Give yourself a pat on the back! So far, you've identified your target audience and integrated key data sources to improve the relevancy of your content. The next stage is to put the pieces together to create an unforgettable cross-channel experience for your customers.

Stage Three: Campaign Composition

In the third stage, it's all about composing an amazing cross-channel campaign for your customers. But before you start designing email templates, here are just a few questions you should ask yourself first:

1. What are the enter and exit criteria for your campaign?
2. How many touchpoints are needed and what are their CTAs?
3. Which channels will you use to communicate at these touchpoints?
4. How long will you delay between each message?
5. How will you filter users through each step of the workflow?

If you send an email at the wrong time or via the wrong channel, you miss the opportunity to connect with your customers. And if you send messages too often, you run the risk of them developing fatigue and dropping your brand altogether (yikes!).

As a marketer, you're responsible for striking the right balance between too little and too much, and find them where they're most active and responsive. Plan first, then act accordingly.

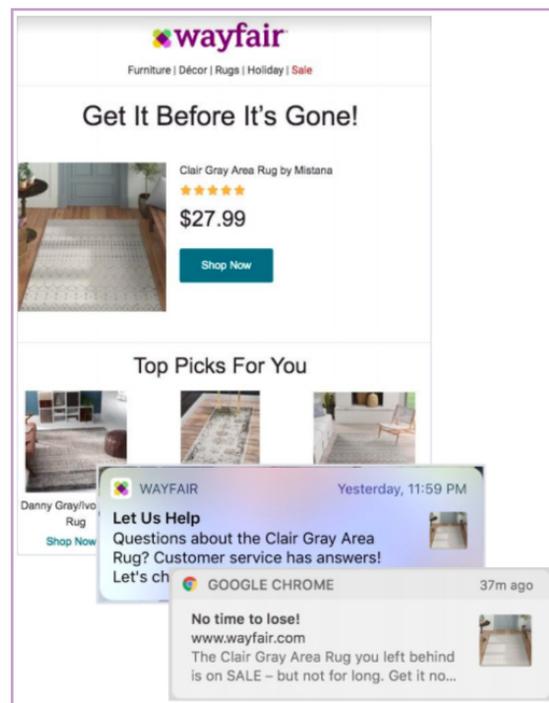


Inside Look: Wayfair

Target Audience: A customer who added an item to the shopping cart but didn't complete the purchase.

Situation: It's common for shoppers to browse and add items to the cart with no intention of buying anything. The average cart abandonment rate is 81%, so online retailers need to work hard to overcome this obstacle and encourage their customers to complete the transaction.

Solution: Wayfair sends cross-channel notifications to invite the customer back to the website and complete the purchase. These messages are cohesive across the channels (email, mobile push, web push), ensuring a seamless experience for the customer. The messaging increases urgency over time, while the image of the rug keeps the item top of mind.

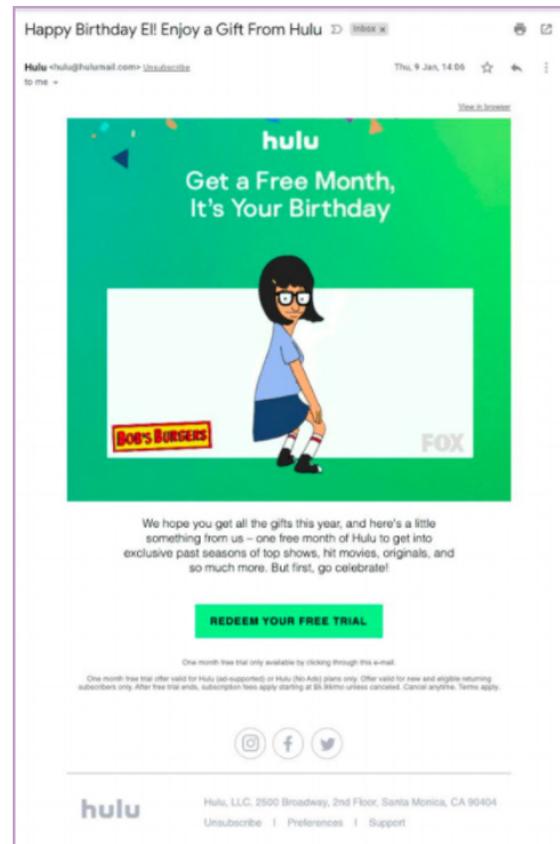


Inside Look: Hulu

Target Audience: New or eligible returning subscribers who haven't completed their free trial.

Situation: Hulu customers are able to sign up for a 30-day free trial before paying a monthly subscription fee for their streaming services. But those who have yet to redeem their offer could use a fun and friendly message to remind them of what they're missing out on.

Solution: Hulu knows that a little humor goes a long way in capturing the reader's attention. This birthday email campaign uses an animated GIF of a popular character in one of their top shows (Tina Belcher from "Bob's Burgers") to inject a little fun. In acknowledgement of the recipient's birthday, Hulu offers a free one-month trial as a gift.



Mini Assignment #3:

- Gather your favorite and top-performing campaigns.**
Pick the top 10 as a starting point.
- Look for trends and patterns in the elements,** themes and features. Do you notice anything that stands out?
- Pick the standout element** and incorporate it into your next campaign.



Let's do a quick recap. You've identified your target audience, chose the right messaging channels, and drew inspiration from your top-performing campaigns. By now, you have enough materials to start personalizing messages that speak to your audience.

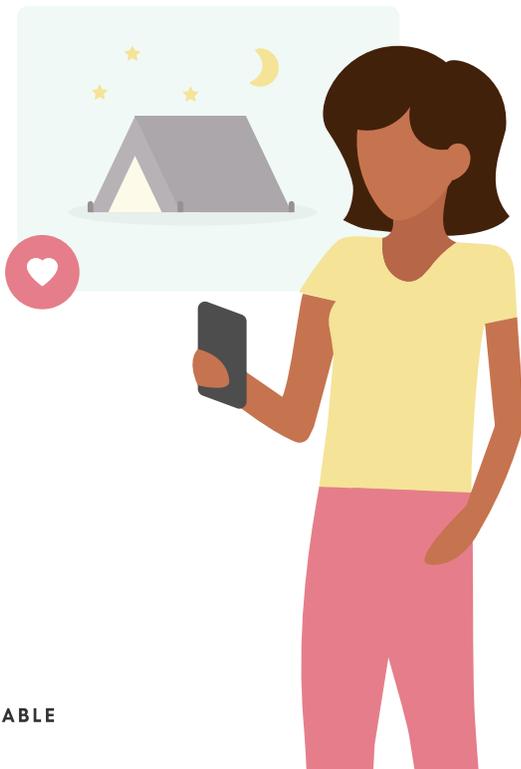
Stage Four: Message Personalization

In this pivotal stage, you have the chance to appeal to your customers by providing them with personalized messages while reinforcing your brand value.

In a survey, 72% of consumers say they will only engage with marketing that is personalized. When it comes to tailoring messages for your customers, be sure to make them feel wanted, remembered, valued and connected.



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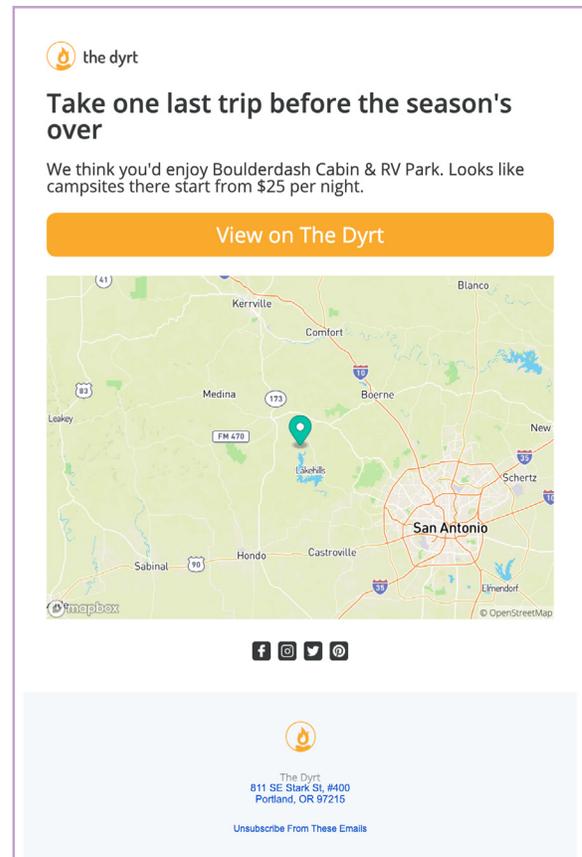


Inside Look: The Dyrft

Target Audience: Campers interested in taking one last trip before camping season ends.

Situation: Powered by Iterable, The Dyrft is the highest-ranked camping app that recommends campgrounds based on the user's desired geographic location, price and camping preferences.

Solution: The Dyrft creates this highly personalized campsite recommendation based on user attributes: first name in the subject line ("Consider one last trip, James"), city (San Antonio), and price (starting from \$25 per night). The image of the map displaying the campground's location makes the message more compelling and incites the user to take action by clicking the CTA.

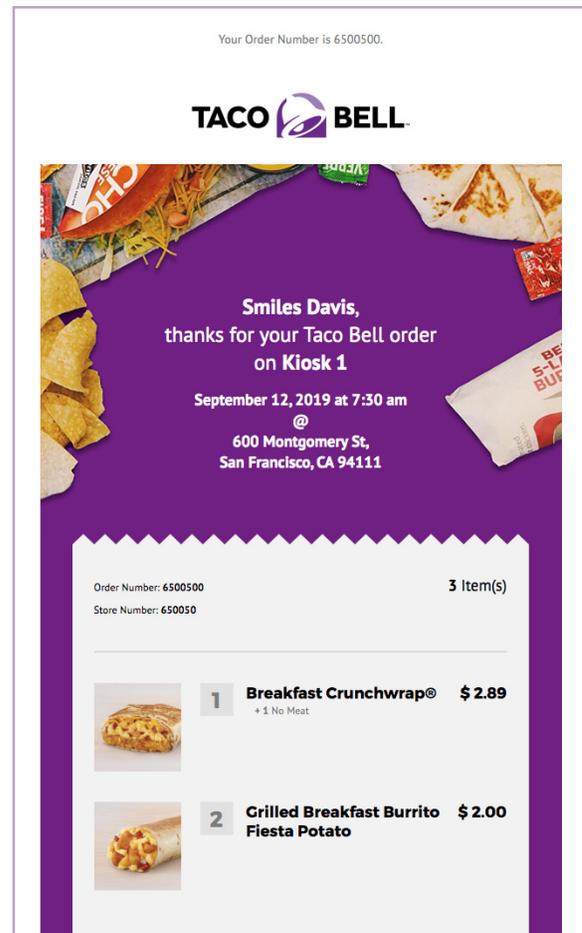


Inside Look: Taco Bell

Target Audience: A customer who places a take-out order.

Situation: Taco Bell's customer base is often on the go, so it's important that the fast food chain makes it just as easy and engaging to order food in advance via desktop and mobile as it is to order in-person.

Solution: Transactional messaging doesn't have to be bland and boring, as Taco Bell proves in its reimagining of the receipt, which evokes the feeling of being at the restaurant. The CTA makes it easy to track an order, and the option to favorite the items gives customers a frictionless experience and the brand the ability to offer personalized recommendations in the future.



Source: Really Good Emails

Mini Assignment #4:

- Choose **five** of your recent emails at random.
- Talk to **your teammates**. Brainstorm which elements did exceptionally well.
- Make **key changes** to your next email based on your group's consensus.



Creating and launching a campaign is the fun part. But the real work begins after you press that 'send' button, and the results start rolling in. Now it's time for you to evaluate the performance and see where things went right (and wrong).

Stage Five: Performance Optimization

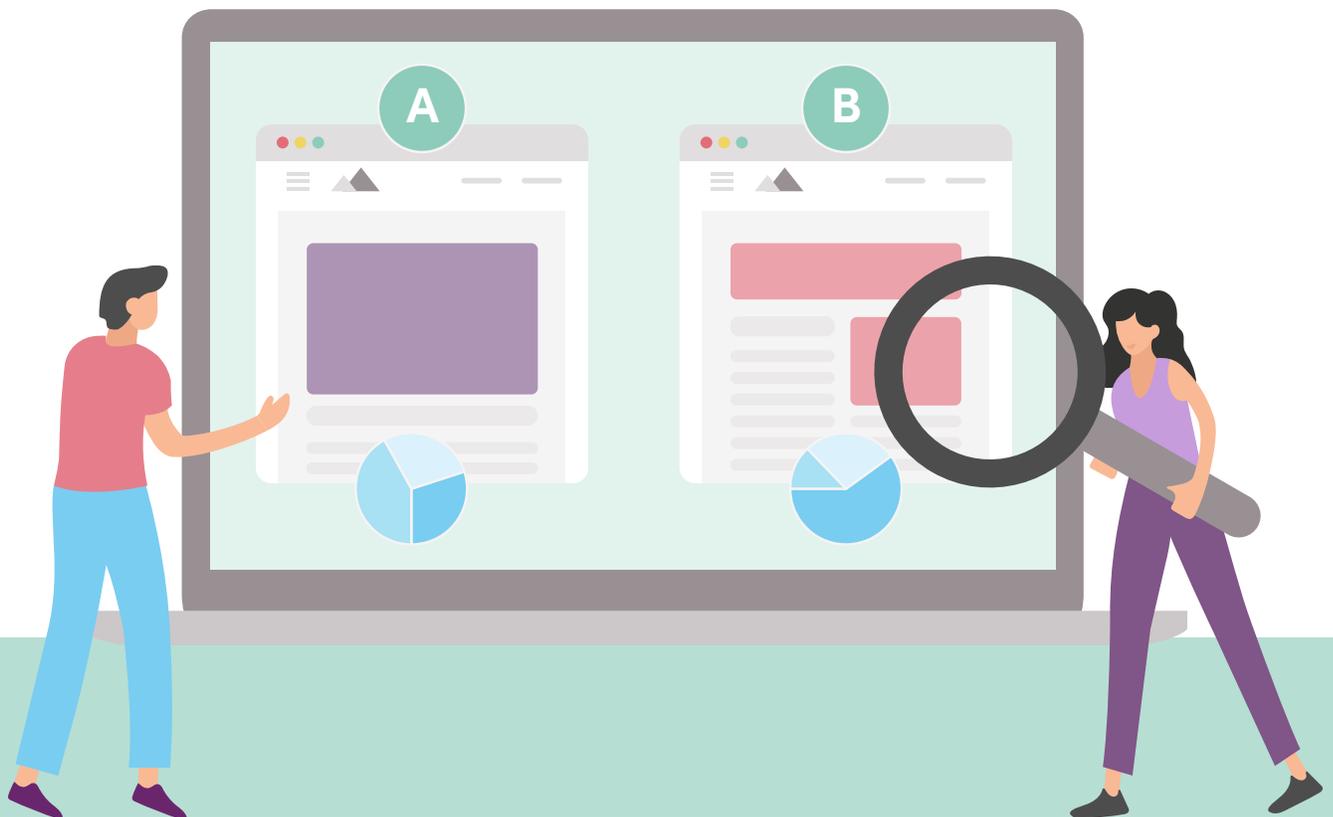
The final stage of campaign building is analyzing performance results. What did you learn? Did the outcome meet your expectations? If not, what can you do to improve your future campaigns?

Refer to previous user engagement data to gauge the effectiveness of your current campaign.

Chances are, you'll notice varying degrees of success across the channels.

Conducting A/B tests and multivariate experiments to determine which elements resonate the most with your customers. A modern growth marketing platform will be able to put performance improvements on autopilot by using AI technology to optimize by send time, frequency and channel.

You can only get better by learning from your past wins and losses, so keep iterating until you achieve your business goals.



Closing Thoughts (Learn, Build, Create!)

The success of your cross-channel campaigns hinges on your ability to access and activate your customers' user and event data and turn them into highly personalized experiences.

Regardless of what products or services you're offering, keep in mind the following:

1. **Learn** the nuts and bolts of your customers.
2. **Build** individualized campaigns with their goals in mind.
3. **Create** a unified brand experience for your customers.

With the knowledge you've gained, go forth and start building a campaign that delights and engages your customers throughout their unique journeys.

To learn more about how you can create personalized campaigns across email, SMS, mobile push, web push, in-app, social and more, [schedule a demo with Iterable](#).



About Iterable

Iterable is a 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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