Building a personalization program from zero

Crafting tailored emails with any budget

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InStride

71%

Customers expect personalized interactions from brands

71%

CMOs believe they lack sufficient budget to fully execute their strategy

Starting from where you are

Areas you can target today, no matter your resources

Stage 1: Brand-based

Stage 2: Identity-based

Stage 3: Behavior-based

Stage 4: Affinity-based

Brand-based

Establish yourself with assets immediately identifiable as and (often) unique to your company

Your own voice and culture

- What makes your brand and product identifiable?
- Can you be selected out of a busy inbox?

Localization

- Should you offer multiple languages?
- What idioms, phrases, and quirks will make your users feel at home?
- Complement (or avoid) holidays you know your users are likely to participate in

How to use:

- Become recognizable in your creative tone and personality
- Build out a serve-your-masses persona

Identity-based

Zero-party data: Build communication with your users. Open channels for them to tell you about themselves

Basic facts

- Preferred name
- Birthday/Age
- Location
- Gender

Surveys and Quizzes

- Personal preferences
- Likes and dislikes

How to use:

- Subject line and intro personalization (that matches what **your users** respond to)
- Begin segmentation: adjust campaign types and frequencies
- Leverage alternate channels, like SMS

Behavior-based

First-party data: How can your records of conversions, pageviews, and interactions serve the user?

Conversions

- Product timeliness reminders
- Preferred traits

Browse behavior

- Commonly-viewed pages
- Time engaged
- Clicks and opens in your campaigns

How to use:

- Serve recommended products/resources. This can begin with manually built curation and grow into dynamic content blocks
- User-triggered campaigns

Affinity-based

Personas and predictions: You know some of your users really well - who they are, what they need. How can you extrapolate your successes?

Personas

- Combo platters of your identity- and behavior-based trends
- Advanced tagging to create diverse combinations from finite inputs

Predictions

- Machine learning/algorithms
- AI
- If/then flows

How to use:

- User testimonials and stats
- Expand audience size and sophistication
- Improve the scalability of your recommendations

Think ahead

Map out ideal scenarios

- Tell the story
- Brainstorm, edit, and brainstorm again
- Build out connections - what information pieces do you need to 'speak' to each other?

Document data schema

- Event vs user field
- Data types:
  - String
  - Boolean
  - Number/Date/Currency
  - Object
  - Array
- Relational data

Operationalizing your data

Manual

- CSV uploads
- Multi-campaign sends

ESP-driven

- Audiences/ segments
- User fields and merge tags
- Dynamic content languages

Third-party connectors

- Customer data platforms (CDPs)
- Integrations with survey, webinar, and shop vendors
- Real-time data from your business ⭐

Get buy-in

From your leadership

- Run pilots
- Test results
- Include time savings in ROI
- Be forward-thinking (AI, etc)

From your user base

- Acknowledge personalization
- Provide input areas
- Get granular with campaigns. What is the minimum amount you can communicate, and still add value?

Professional development

Community resources

- #emailgeeks on Slack
- ESP blogs and communities
- Your Product/Tech/Operations/Growth team

Inspiration

- ReallyGoodEmails.com
- Newsletters from brands you love
- User interviews