



How to Use Data & Design to Drive Cross-Channel Personalization at Scale

Movable Ink + Yes Marketing

November 17, 2019



Agenda

- Importance of Personalization and Relevancy
- It's All About the Data
- Use of Personas, Segments & Models
- Designing for Personalization
- Real-time Solution





Bryan Finke
VP, Client Experience
Comm Strategies
Yes Marketing



Matt Caldwell
SVP
Creative
Yes Marketing



Julio Lopez
Associate Director,
Client Strategy
Movable Ink

About Movable Ink



Company Stats

700+ Leading Brands

300+ Employees



Global Presence

Head Office: New York City

Regional offices: San Francisco, Chicago, London, Tokyo



Accolades



Fastest-Growing
Growth Stage Private
Software Company



Extensive Partner Network



ESPs



Agencies



Technology

Movable Ink

Over 700 innovative companies rely on us.

Brands in Technology, Retail, Entertainment, Media, and Finance use Movable Ink to surprise and delight their customers and drive revenue.



About Yes Marketing



Company Stats

Infogroup, parent company

300+ Employees



We Do It All

Marketing Services

+

Data

+

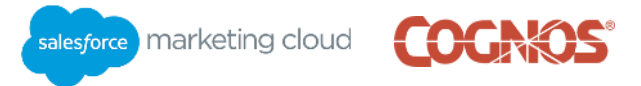
Marketing Technology
























Accolades



Extensive Partner Network

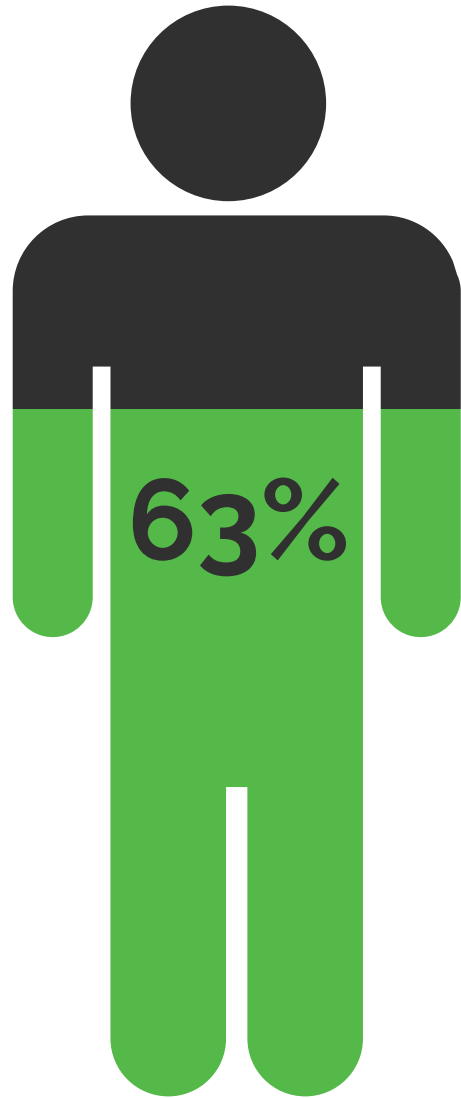


yes brands

	Dillard's		See's CANDIES	
	WYNDHAM • DESTINATIONS			
				
				MARRIOTT BONVOY™
				

Consumers
Expect
Relevance &
Personalization





Consumers agreed that they expect personalization from brands and retailers.

January 2019 survey conducted by The Harris Poll

It Works

Emails with personalized subject lines vs. those without personalization in the subject line



Higher Open Rates




Higher Click-to-Open Rates



Unique Click Rates



Yes Marketing data

A photograph of a wooden desk with several Sharpie markers and a stack of 'Hello my name is' name tags. The name tags are white with blue horizontal bars and the text 'Hello my name is' at the bottom. The markers are various colors and brands, including Sharpie and Super Permanent Ink. The text 'Personalization can take many forms' is overlaid on the right side of the image.

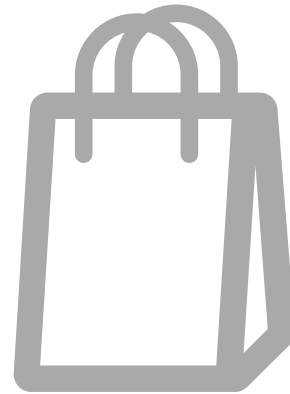
Personalization
can take many
forms

Ways to Personalize



Data Attributes

Name, Geo,
Persona, Segment,
Model Score



Behavior

Past Purchase,
Email or Browse
Activity



Context

Real-time, Based on
Point in Customer
Journey

The most commonly used types of data to personalize emails



Demographic Data

Gender | Age | Income | Residence | Presence of children | Education level



Psychographic Data

Personality traits | Interests | Lifestyle choices | Beliefs



Browse Data

Web pages visited | Browsed items | Items added to/abandoned in cart



Preference Center Data

Personal details (name, birthday, ZIP code, etc.) | Preferred type of email content | Email frequency preferences



Email Activity

Open rates | Click-through rates | Opt-in date



Real-Time Data

Local weather | Sporting events | Real-time location



Purchase Data

Purchased items | Order value | Purchase frequency

Honeywell

Monthly Energy Report Campaign

- Data populated based on consumer's individual thermostat
- Month over month and year over year usage stats
- Pulls in weather data for context based on where the thermostat is located

Valuable insights on how to save energy each month. [View online](#)

Honeywell Home

November Energy Report

Todd, welcome to your Energy Report for: Alumnae House

November Trends: Heating & cooling compared with last month

Heating **40 hrs more**

Cooling **146 hrs less**

On average, temperatures were 14° cooler than October 2018.

Heating and Cooling: This Month vs Last


E. Thermostat

Month	Weather	HEATING	COOLING	OFF	Avg Away	Avg Home
NOVEMBER 2018	Avg Hi: 58° Avg Lo: 41°	141 hours	7 hours	572 hours	65°/-°	69°/72°
OCTOBER 2018	Avg Hi: 72° Avg Lo: 55°	42 hours	107 hours	595 hours	67°/75°	70°/70°

W. Thermostat

Month	Weather	HEATING	COOLING	OFF	Avg Away	Avg Home
NOVEMBER 2018	Avg Hi: 58° Avg Lo: 41°	0 hours	0 hours	720 hours	--°/--°	--°/--°
OCTOBER 2018	Avg Hi: 72° Avg Lo: 55°	59 hours	46 hours	639 hours	69°/-°	71°/75°

Some information is missing. Hours shown are an estimate based on available data. [Learn more](#) about keeping your thermostat connected.



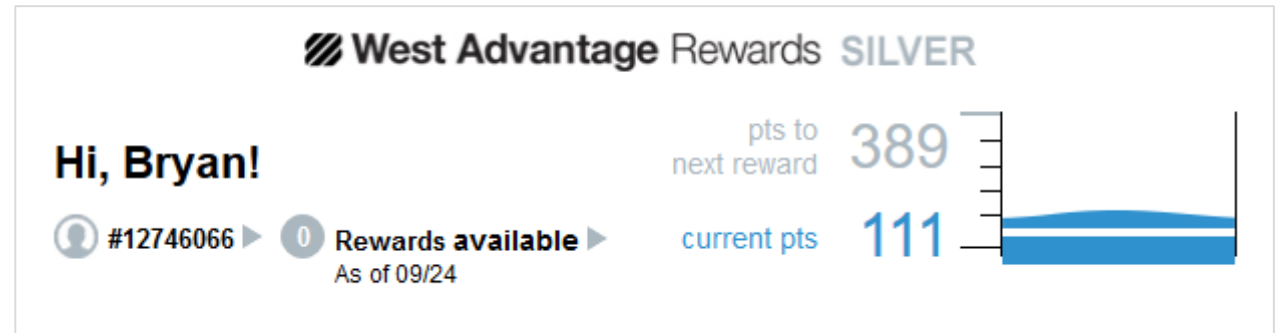
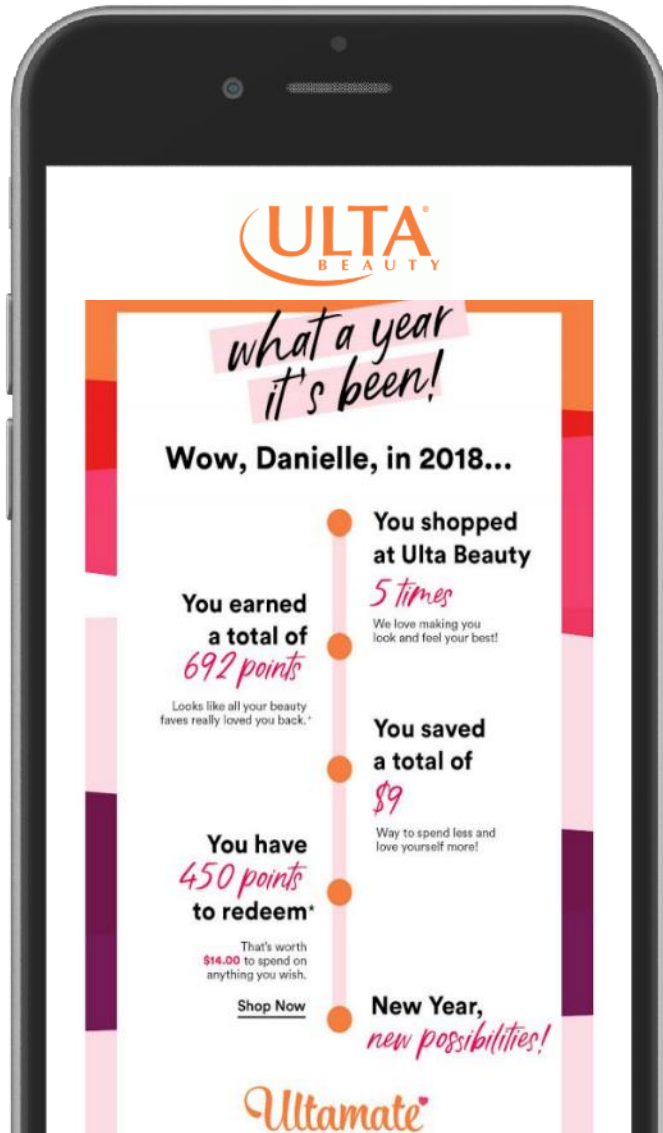
Find a Honeywell Home pro

Help keep your efficiency high this month. Between holiday travel and hosting friends and family, there's no time for an issue with the heating in December. Bookmark the Honeywell Home Find a Pro tool for quick access to local pros. [Learn More](#)

Honeywell Home

[f](#) [t](#) [i](#) [p](#)

Examples of Merging Actual Customer Data



Spartan

Relevant content that is dynamically populated based on lifecycle segment, type of racer (persona) and individual status (1x1).

SPARTAN SPARTAN LIFE NEWSLETTER AUGUST 2018

KK WELCOME

Welcome to the revamped Spartan newsletter. Spartan is about more than a race, it's a way of life and, through this newsletter, I hope to push you to become the best version of yourself.

Each month, we'll share stories of fellow Spartan racers, nutrition, training, and mindfulness tips, a record of your own stats and a look ahead at upcoming races. Thank you for being a part of the Spartan community and let's keep climbing towards the next challenge!

- JOE DE SENA
CEO AND FOUNDER, SPARTAN RACES

REA KOLBL
CO Native. PhD Student. Spartan.

READ HER STORY

REA'S RISE TO THE TOP

From signing up with friends for her first race when they came across a Groupon deal on Spartan Races to a second place finish in the United States Spartan Championship Series, Rea Kolbl proves that with determination, grit, and training, anything is possible.

REA'S TIPS FOR SUCCESS

TRAIN LIKE A SPARTAN

WORK YOUR LEGS FOR MOUNTAIN TRAILS

Running on trails is a different beast, but with proper training, you'll crush every mountain.

FIND YOUR STRIDE

WILL HIT WORK FOR YOU?

High Intensity Interval Training (HIIT) is an effective way to build speed and increase body fat.

TRY OUT SPEED LAB

EAT LIKE A SPARTAN

Egg, Avocado & Sriracha Sandwich

Mason Protein Oats

Microwave Mug Omelet

HIGH-OCTANE BREAKFASTS

In order to be your best, you need to eat the best. Luckily, healthy doesn't have to take a long time. We've rounded up 2-minute breakfasts that start your day off with a blast of nutrients.

SEE 2-MINUTE BREAKFASTS

SLOW DOWN TO SPEED UP

The key to preparing yourself mentally for your next personal challenge is getting in the right headspace.

ARE YOU RACE READY?

HOW TO MASTER THE 5-GALLON BUCKET CARRY

Upper-back strength and a strong grip are just part of the equation.

CONQUER YOUR NEXT BUCKET CARRY

NORTH AMERICAN CHAMPIONSHIP PREVIEW

This August, the biggest race of the year tries to tame its West Virginia.

ATTEND THE 2018 CHAMPIONSHIP

IT'S ALL IN THE SHOES

HOW TO CHOOSE YOUR RUNNING SHOES

You do the tough work out on the course, but finding the best running shoes for the job goes a long way.

CHOOSE THE RIGHT SHOES

YOUR SPARTAN STATS

0 RACES COMPLETED

Looking for a challenge? **SEE ALL RACE TYPES**

MOST RECENT RACE

0 DAYS SINCE YOUR LAST RACE

Get back out there. **FIND A RACE**

RACE RANKING

CURRENT MEN'S U.S. NATIONAL SERIES LEADERS

Name	Overall	Gender	Age	Points
Ryan Adams	2	M	31	1142
Ryan Adams	5	M	31	1139
Robert Kitten	7	M	27	1136
Ryan Ford	8	M	4	1132
Angel Garcia	10	M	31	1132

CURRENT WOMEN'S U.S. NATIONAL SERIES LEADERS

Name	Overall	Gender	Age	Points
Lindsay White	1	F	31	1136
Ryan Adams	2	F	27	1136
Ryan Kitten	4	F	31	1132
Alyssa Ranley	6	F	4	1130
Lugh Annan	8	F	31	1130

SPARTANS ON SOCIAL

SPARTANRACES

SPARTANRACES Put yourself up, you got this! @spartanraces @spartanraces ...MORE

SHARE YOUR OWN SPARTAN STORY

TRAIN EAT LIFE SHOP

Instagram Facebook Twitter YouTube

Please add [@spartanraces](#) to your address book.

This mailing was sent to [lindsay.white@spartanraces.com](#) because you signed up to receive email from Spartan.

For more information about Spartan privacy practices, see our online privacy statement.

View Online | Update your email preferences | Unsubscribe

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Still There is a Gap...

89%

of digital businesses say
they are personalizing
experiences

Source: Forrester report Evolve Now To Personalization 2.0: Individualization; Forrester Data Consumer Technographics Global Online Benchmark Survey (Part 2), 2018

Still There is a Gap...

89% of digital businesses say they are personalizing experiences

13% of U.S. online adults aged 18 – 24 say that brands make them feel valued

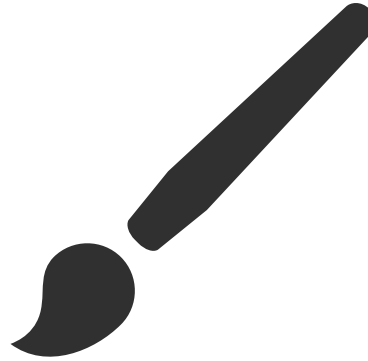
5% of U.S. Consumers say email offers are usually well-timed with my needs

Source: Forrester report Evolve Now To Personalization 2.0: Individualization; Forrester Data Consumer Technographics Global Online Benchmark Survey (Part 2), 2018

Why? What are the Challenges for Brands?



Data
Accurate,
Actionable

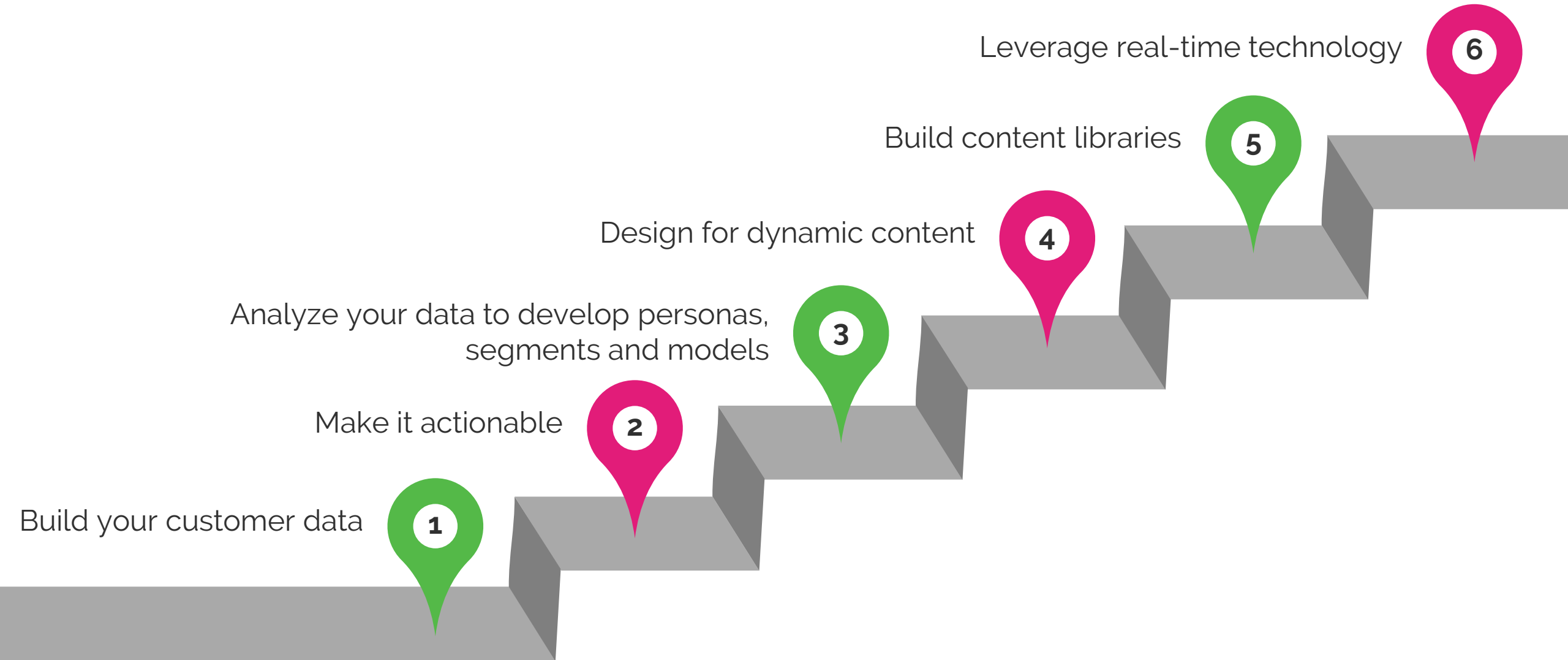



Creative
Dynamic Design
and Scalable
Content
Development



Technology
Integrating
Technology to
Deliver the Desired
Experience

6 Steps to Better Personalization



A DJ with a beard and glasses, wearing a white t-shirt and white headphones, is focused on operating a Pioneer DJ mixer. He is wearing a green wristband. The background shows a dimly lit nightclub with other people and a basket of greenery on the counter. The text "Combine zero, first, second & third-party data to build your customer record" is overlaid in white on the left side of the image.

Combine zero, first,
second & third-party
data to build your
customer record

Types of Customer Data

- **Zero-party** = data consumers give marketers to improve their experience
- **First-party** = data collected through customers interactions with a marketer
- **Second-party** = someone else's first-party data that their customer has consented can be shared with another marketer
- **Third-party** = data collected by a third-party with no direct connection to the customer



Community Coffee
MANAGE YOUR PREFERENCES

Your Perfect Blend
Tell us how you take your emails.

Tell Us About Your Origins
* Required Fields

Birthdays Are Kind Of A Big Deal To Us
We'll mark our calendar and help you celebrate yours.

Month Day

What Makes Your Perfect Cup?
Feel free to choose them all.

GROUND

SINGLE-SERVE

WHOLE BEAN

PRIVATE RESERVE®

TEA

FLAVORED COFFEE

What Pairs Well With Your Interests?
Feel free to choose them all.

- Seed to cup (sourcing, roasting, brewing, tasting)
- Recipes
- Coffee pairings
- Deals, promotions, special offers
- New products
- Local events and sponsorships
- Giving back to local communities
- Career opportunities

Where Do You Buy Community® Coffee?
Feel free to choose them all.

- Online at CommunityCoffee.com
- Other online retailers (Ex. Amazon.com)
- In my local grocery store

Submit Preferences

West Marine

Update your email preferences

BRYAN, you are subscribed as bryan.finke@yesmail.com. Please take a moment to update your interests and the type of information you would like to receive from us.

What is your primary boating activity? (Choose one)

Power Boating

Sailing

Fishing

Paddle / Kayaking

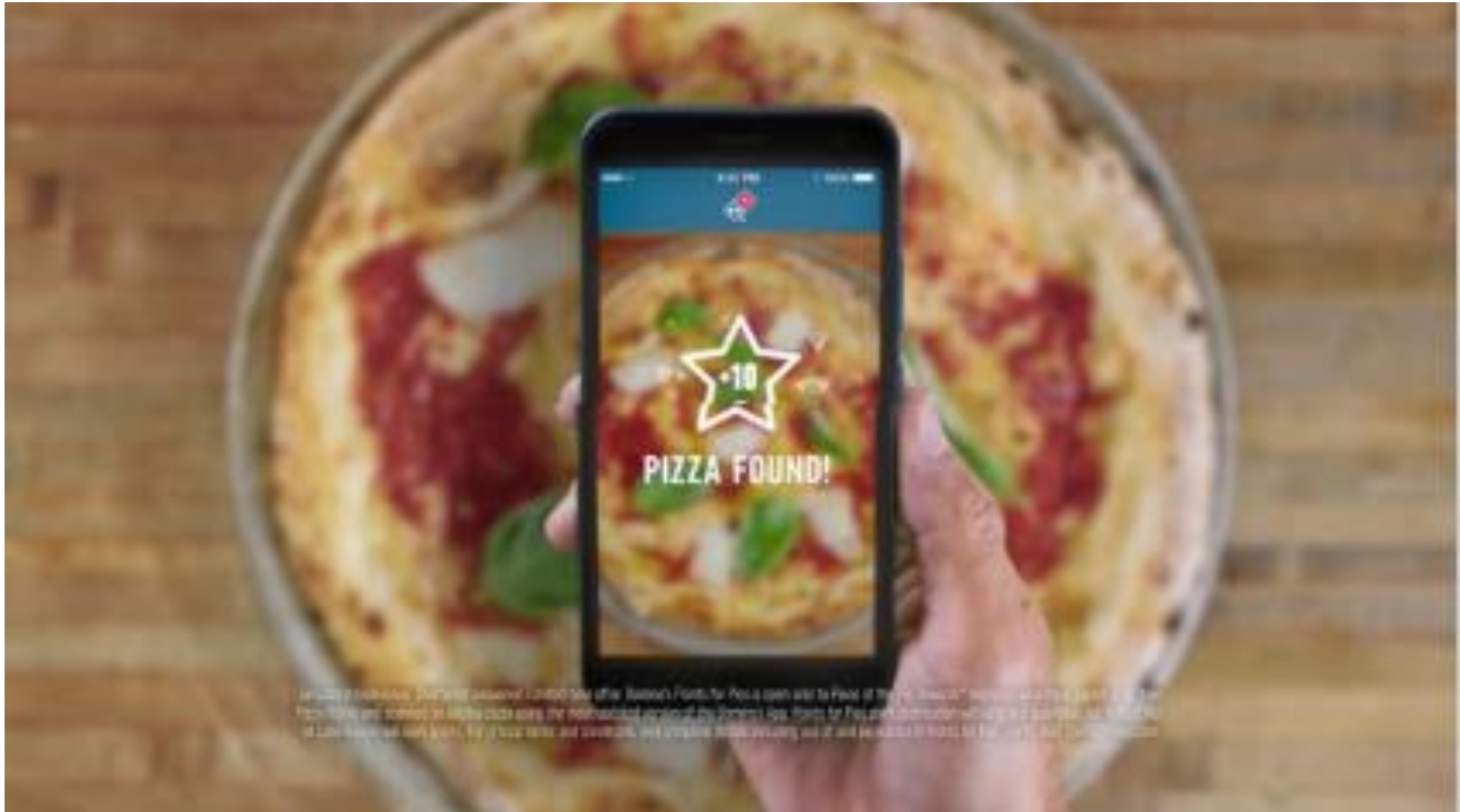
What other activities do you enjoy on the water?

Power Boating Sailing Fishing Paddle / Kayaking

Do you own a boat?

Preference Centers are Great Ways to Capture Zero-party Data...

Dominos Example



Third-party Data Can Help Fill Gaps



She is
married



Has one
child



Lives in
the suburbs



Works in
the city



Purchases in
the evening

Make it
Actionable



Create a single view of your customer

Utilize validation

Dedicate resources to data
management

Develop a customer
data integration
(CDI) framework

The background of the slide features two slices of grapefruit. The slice on the right is a whole cross-section, showing the characteristic radial segments and the central core. The slice on the left is a smaller, partial section. The entire image is overlaid with a semi-transparent dark brown filter, which makes the text stand out clearly.

Use Personas,
Segments & Models
to help scale

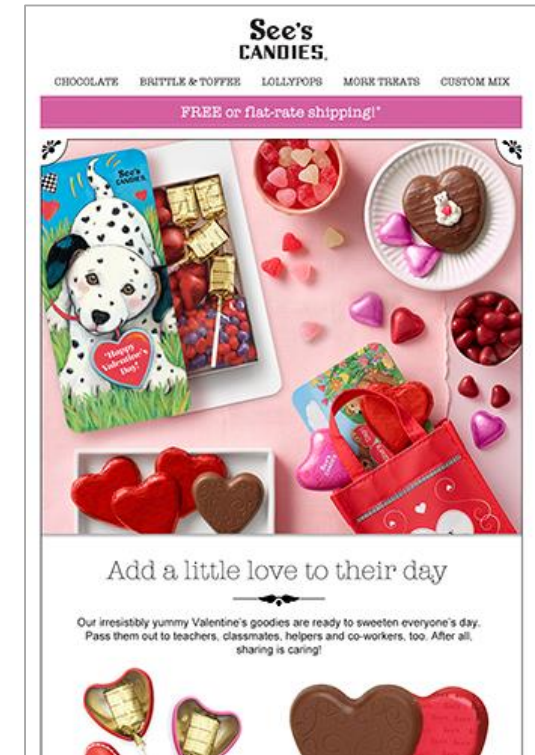
See's Candies Persona Example



Male



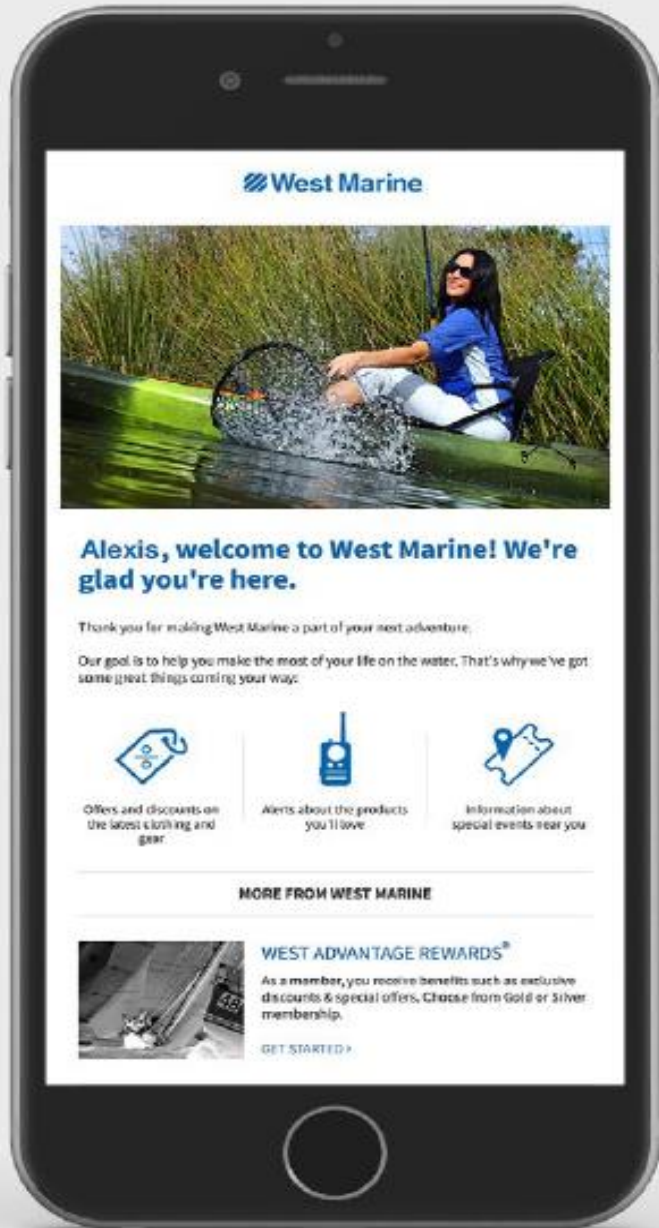
Mom



Grandma

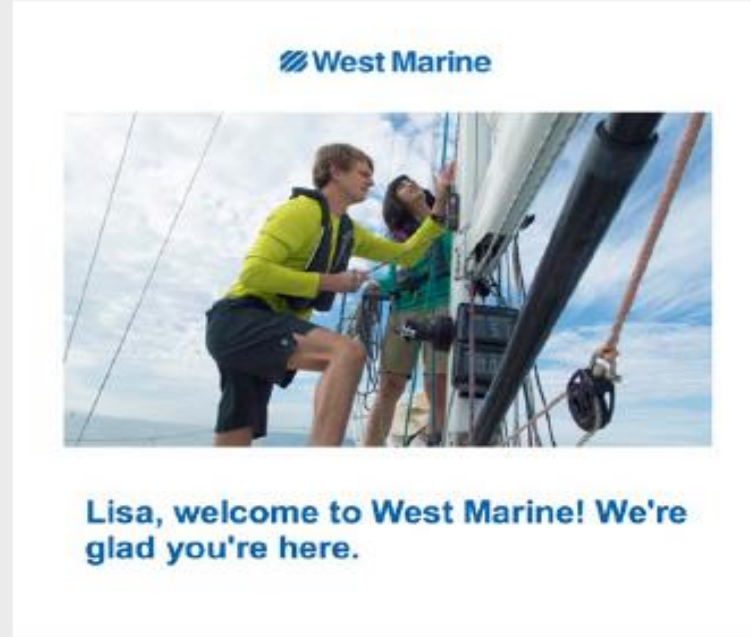
Subject Line:

Welcome Aboard Alexis!



Subject Line:

Welcome Aboard Lisa: The Wind is With Us...



Sailboat enthusiasts receive a welcome greeting that includes first name personalization and identifies their interest in sailing.

Subject Line:

Welcome Aboard Kevin: Full Speed Ahead!



Power and fishing boat lovers receive a welcome message that includes first name personalization and references their boat's speed.

Marriott Rewards

Personalized Approach with Data-driven Modules

Individual Data Driven	Propensity Models	AI Real-time
Based on individual data and behavior	Based on modeled data to determine most likely next action of individual	Based on real-time interaction across campaign and individual information
Member status	Brand	Most valuable promo
Scorecard of activity	Hotel property	Next getaway
Upcoming trip scheduled	Destination	Dynamic segmentation optimization

Marriott Rewards

Personalized Approach with Data-driven Modules

Personalized

Individual Data Driven; based on level of usage

Individual Data Driven; member status

Individual Data Driven

No credit card

Click interest

Likely to rent car

Level of usage

Destination

AI Real-time Next Getaway

Propensity Model Destination

A top-down photograph of a wooden desk. A hand is holding a black Sharpie marker, ready to draw on a piece of light-colored paper. To the left, two other Sharpie markers, one green and one orange, are lying on the desk. A stainless steel ruler is visible in the upper right corner. The text 'Designing for personalization' is overlaid in white on the left side of the image.

Designing for personalization

Designing for Personalization

Template Systems

- What they are
- Why use them
- How to use them
- Designing data-ready modules

Case study: Olive Garden Template System & Dynamic Modules



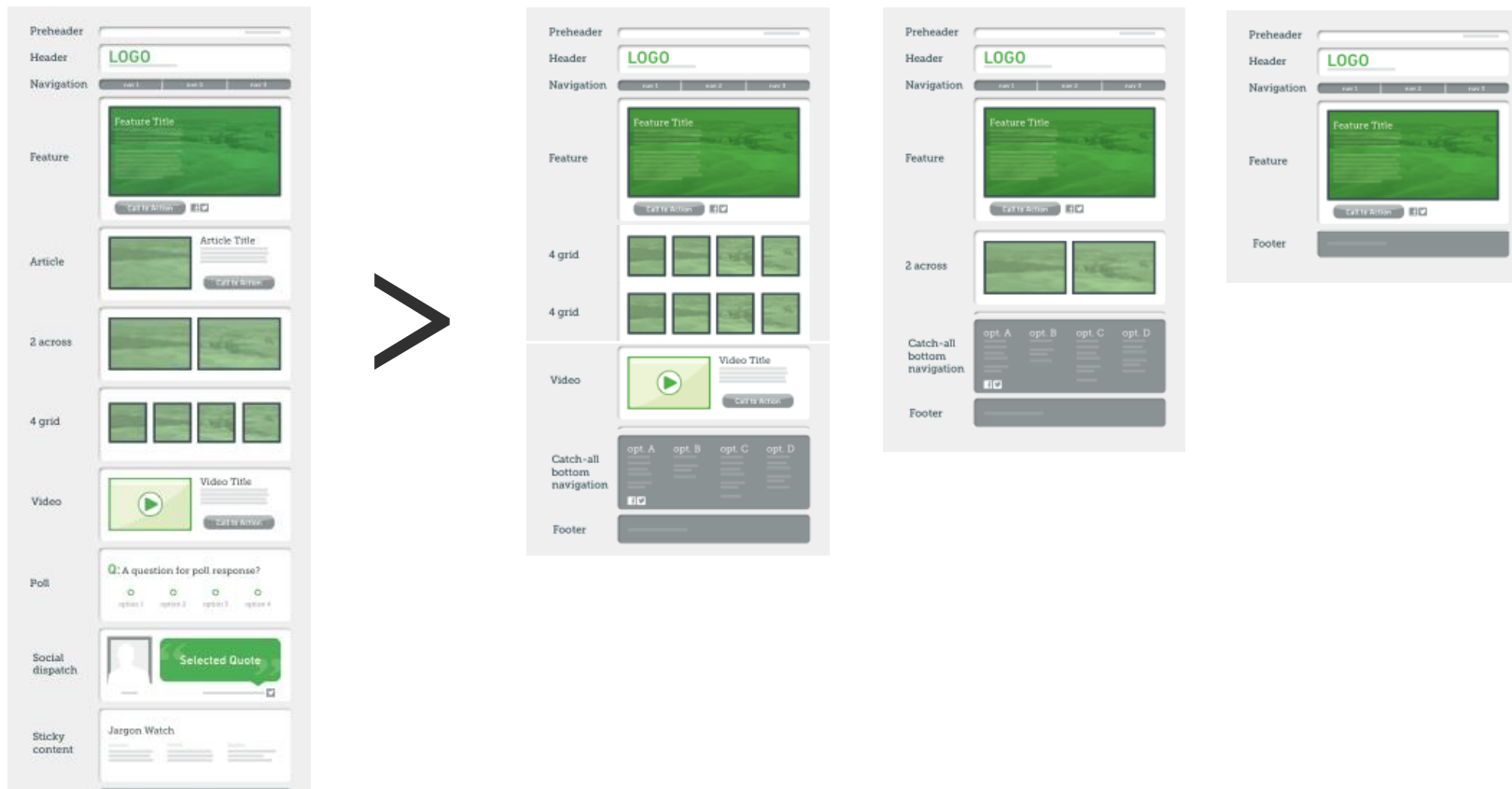
Template Systems

- Standardized headers & footers
- Large variety of modules
- Modules can be duplicated, deleted reordered

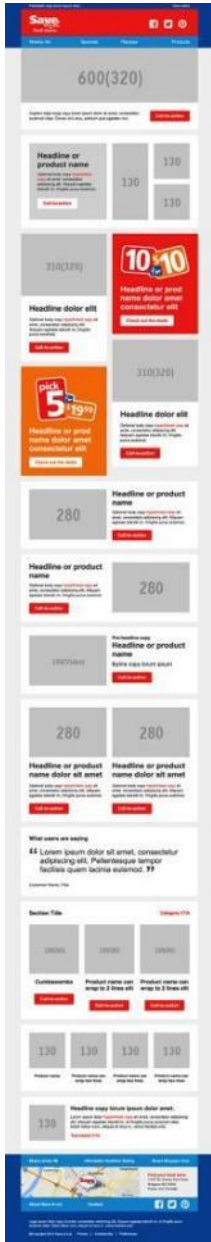


Template Systems

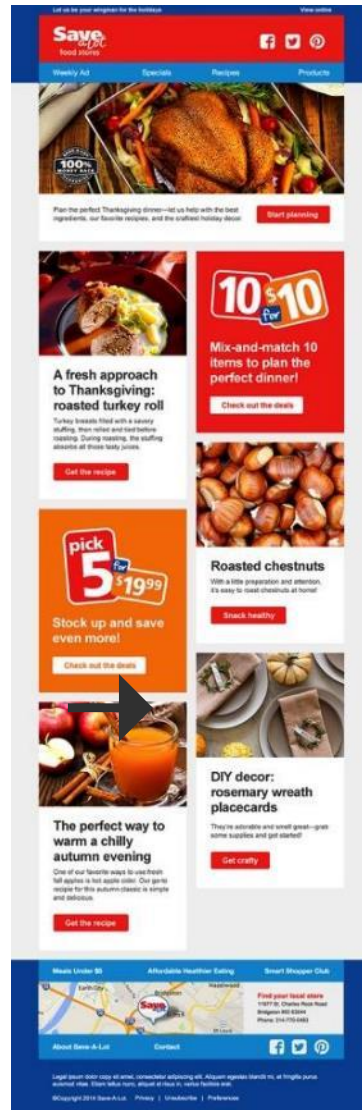
- Critical for high-frequency email publishing
- Design-once, code-once solution



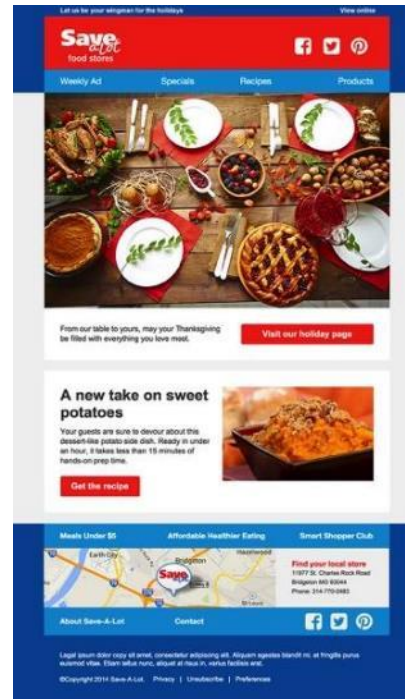
Template



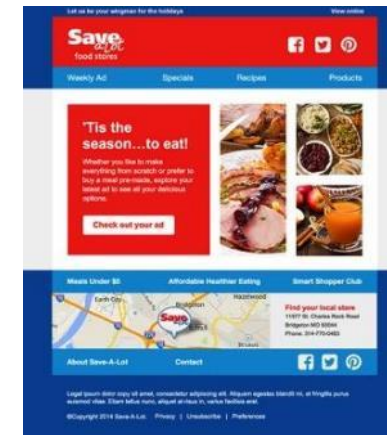
Newsletters



Hybrid



Postcards





HP Logo | **Show Mom you care**
Make her Mother's Day with help from HP

Navigation: Notebooks Desktops Tablets Printers Ink & Toner

Give her a gift from the heart

Personalize a card or print your own party supplies for a Mother's Day celebration she'll never forget. With free photo cards and printable party favors from Snapfish, you can help make it her best Mother's Day yet.

Browse Mother's Day projects

Make Mom happy

Print the perfect Mother's Day card at home. Just download the free HP Photo Creations desktop app and add your favorite photos.

Get started

From screen to paper in three simple steps

Print to your HP wireless printer from your iPad®, iPhone®, or iPod touch® with the magic of AirPrint™ technology.

Learn more

Bring photos to life

Create a Mother's Day photo card that magically comes to life with the HP Live Photo app** for your iPad®, iPhone®, or iPod touch®.

Download on the App Store

Give Mom her "me time"

With crossword puzzles, menu planners, horoscopes, and more, HP Printables! can help you give Mom a much-deserved break.

Browse HP Printables

Don't have an HP ePrint-enabled printer? See what you're missing

Spring spectacular

Lowest prices of the year on select PCs plus save up to 50%* storewide

Shop sale now **Free** Delivery

Savings end March 23rd

Starting at \$329.99*

Starting at \$299.99*

Save \$10 on a \$50 purchase of ink or toner**

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Value on the go Hot prices on our popular everyday notebooks.

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Perfectly priced Unbelievable savings on everyday desktops.

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Great deal ends soon

Act now for ink savings

Navigation: Notebooks Desktops Printers Ink & Toner Accessories

Get 15% off

when you spend \$50 on ink*
Use coupon code **LUVHPINK15**

Shop HP now

Free Delivery next business day

Notebooks	Desktops	Printers	Connect with HP
Everyday	Everyday	All-in-Ones	Facebook
Ultrabooks	High Performance	LaserJets	Twitter
High Performance	All-in-Ones	Wireless	Pinterest
ENVY	TouchSmart PCs	Ink & Toner	


HP.com Privacy Statement Unsubscribe Change email



Alexandra, you have to see this stuff! You're in New York!

CAMBRIA CHOICE privileges
Hotels & Suites

Hi Alexandra
#970543 1,200 Points as of 07/15/2016 Account




**NEWEST LOCATION!
NY CHELSEA**

Save 10%* at Cambria® hotels & suites

BOOK NYC NOW >

*See below for rate restrictions

Hi Alexandra,
Total Points: 1200
Qualifying Nights: 4
Membership Level: MEMBER




**You Have & More Nights
To reach Gold Status**

VIEW MY ACCOUNT >

Hi Alexandra, there's still time to earn Triple Points!

CHOICE privileges.
#970543 1,200 Points as of 07/15/2016 Account



The snow is really piling up.
And so are the points*.

BOOK NOW >

It's not too late to earn triple points,
up to 50,000!*

The Triple Points promotion ends on **January 15**, so don't let this slip away!
Earn triple points for every qualifying stay. Book now to earn your rewards
three times faster. It's that easy.


Book and stay by January 15 to enjoy this offer:

- Book on ChoiceHotels.com or our mobile app.
- Earn triple points, up to 50,000, with every qualifying stay.

LEARN MORE >

Share This <

Your skiing vacation
is all downhill
with Choice Hotels®



Sed ut perspiciatis unde omnis iste
natus error sit voluptatem

BOOK NOW >


Book On The Go
Find a great place to stay with our app.
Read reviews, view hotel amenities and
book your next stay within minutes.

GET THE APP >

GET IT ON Google play | GET IT ON the App Store | GET IT ON amazon

CAMBRIA HOTEL & SUITES NY - CHELSEA

Hi Alexandra,
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VIEW MY ACCOUNT >

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#970543 1,200 Points as of 07/15/2016 Account



Last Chance To Earn
Triple Points*

BOOK NOW >

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LEARN MORE >

Share This <

Your skiing vacation
is all downhill
with Choice Hotels®



Sed ut perspiciatis unde omnis iste
natus error sit voluptatem

BOOK NOW >


Book On The Go
Find a great place to stay with our app.
Read reviews, view hotel amenities and
book your next stay within minutes.

GET THE APP >

GET IT ON Google play | GET IT ON the App Store | GET IT ON amazon

CAMBRIA HOTEL & SUITES NY - CHELSEA

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LEARN MORE >

Share This <

Your skiing vacation
is all downhill
with Choice Hotels®



Sed ut perspiciatis unde omnis iste
natus error sit voluptatem

BOOK NOW >

Book On The Go
Find a great place to stay with our app.
Read reviews, view hotel amenities and
book your next stay within minutes.

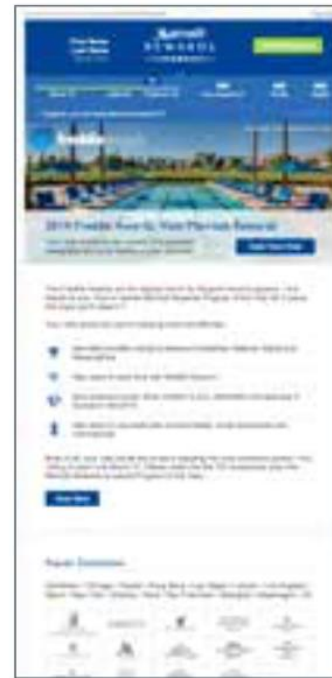
GET THE APP >

GET IT ON Google play | GET IT ON the App Store | GET IT ON amazon

CAMBRIA HOTEL & SUITES NY - CHELSEA

Template Systems

- One Master Template for all email
- Not multiple templates – just one
- All emails are created from the master
- Do not recycle old emails to make new

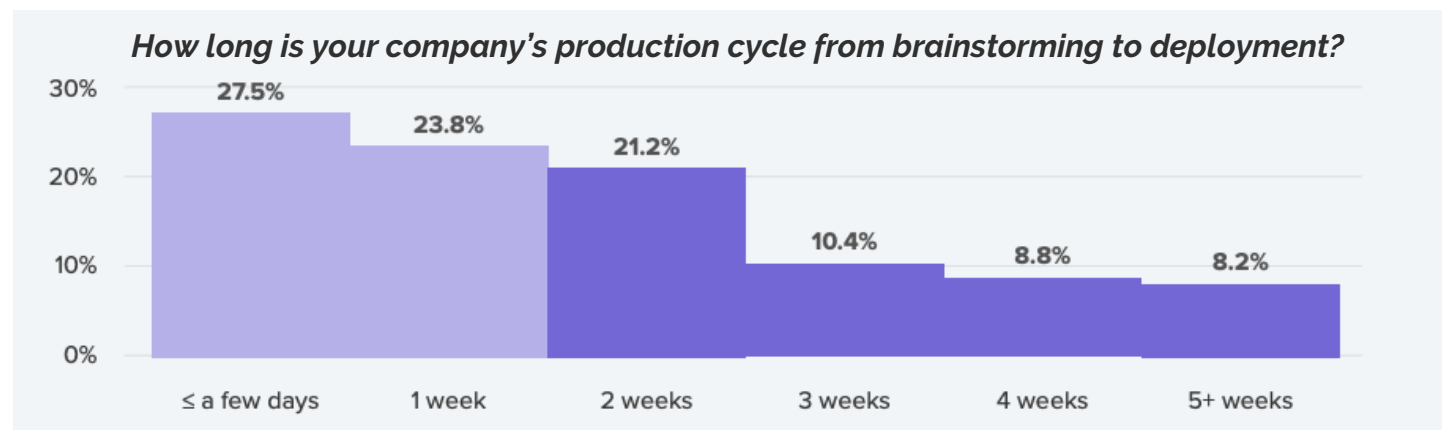




Real-time Solutions

Email Production

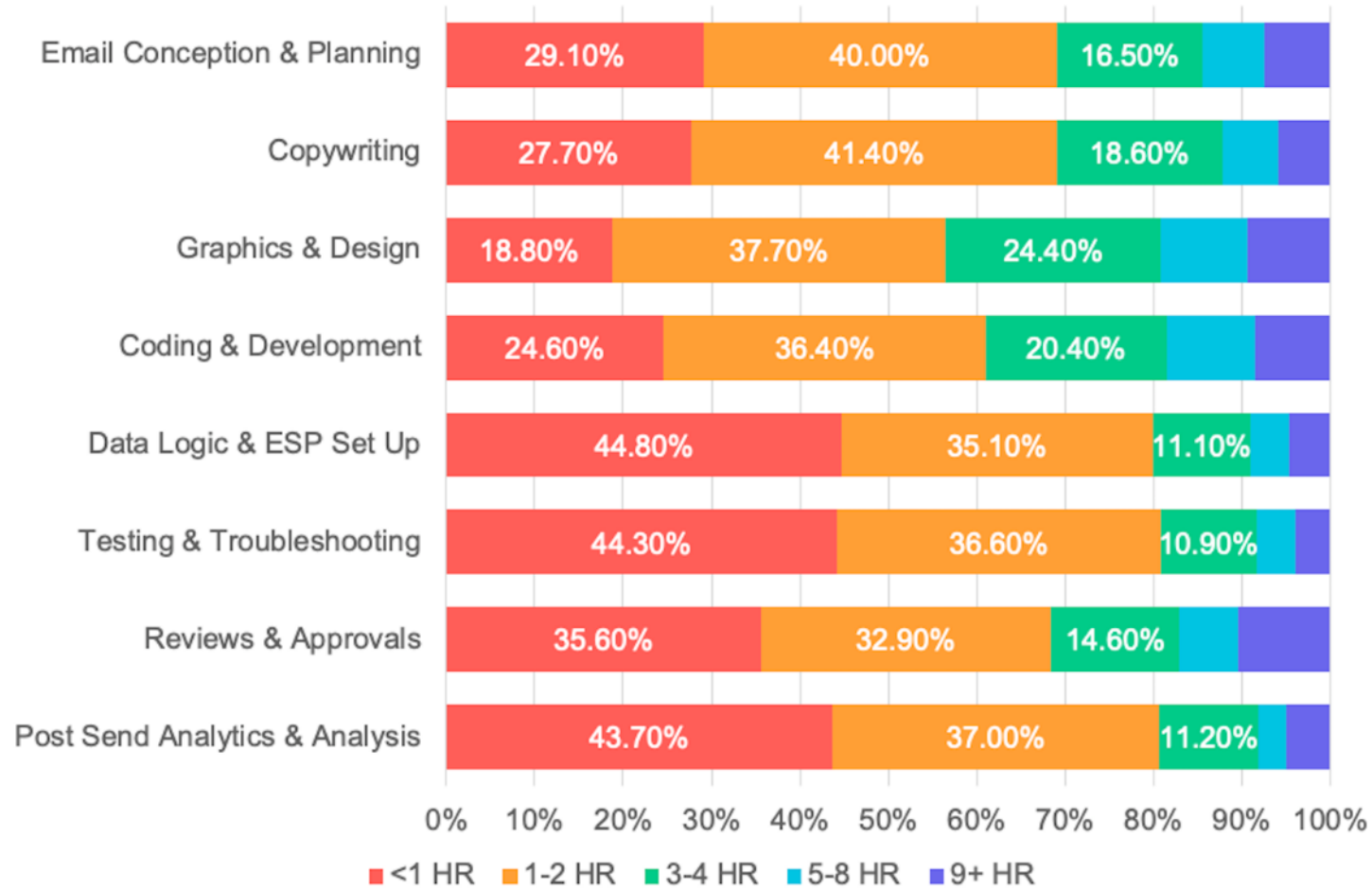
- The number of emails in production and the time it takes brands to produce an email varies significantly from brand to brand, particularly between larger companies and smaller ones
- Marketers at companies with 500 or more employees have **12.4 emails** in production at any given time on average, compared to **8 emails** at smaller companies
- Brands spend **2 weeks on average** taking an email from conception to deployed, email programs at larger companies pulled up this average. Brands with 500 or more employees spend **54% more time** on each of their emails than smaller companies



Source: Litmus
"2018 State of
Email
Workflows"

Email Production *(cont.)*

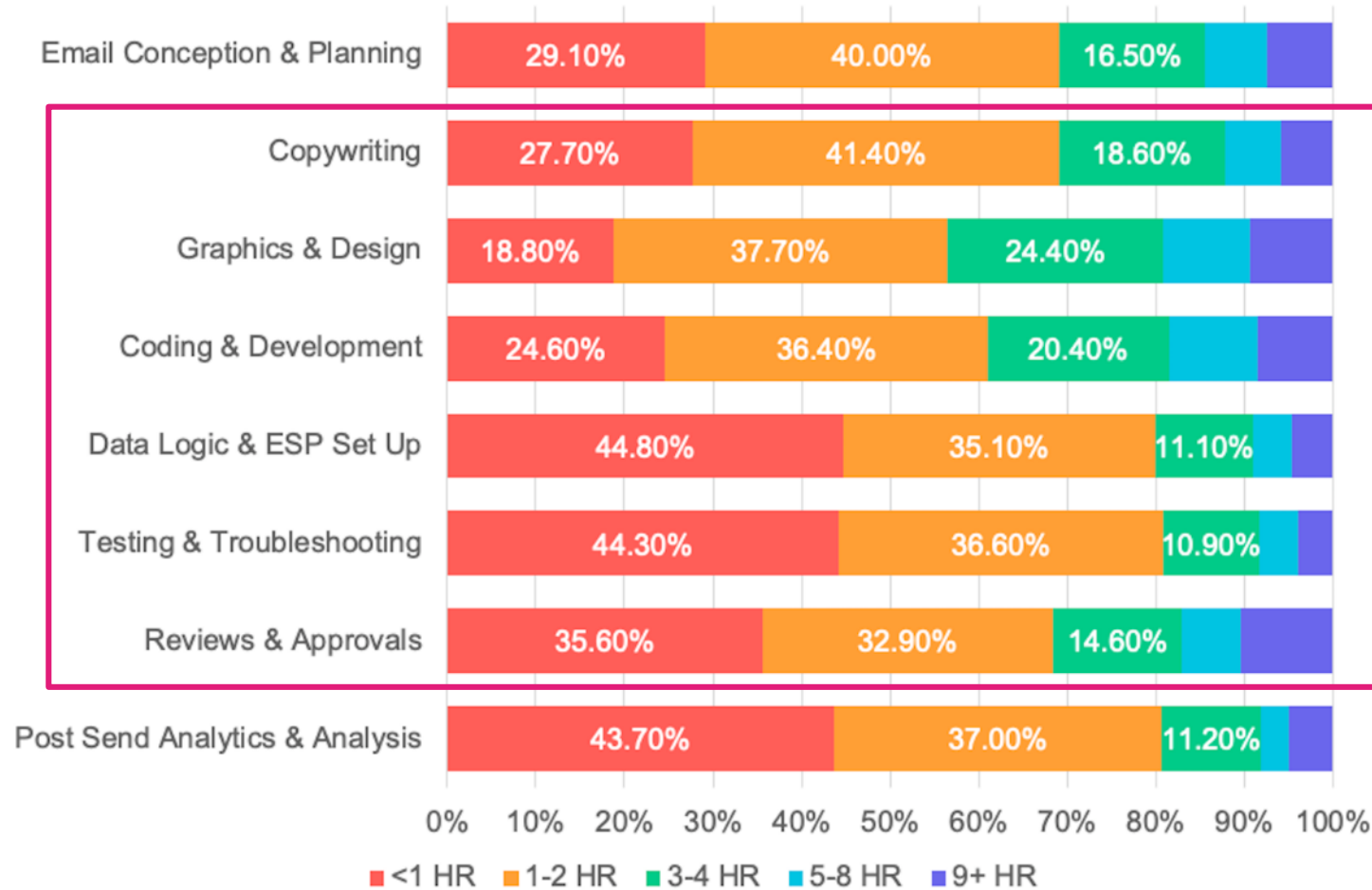
For each email sent, how much time is spent on the following tasks?



Source: Litmus "2018 State of Email Workflows"

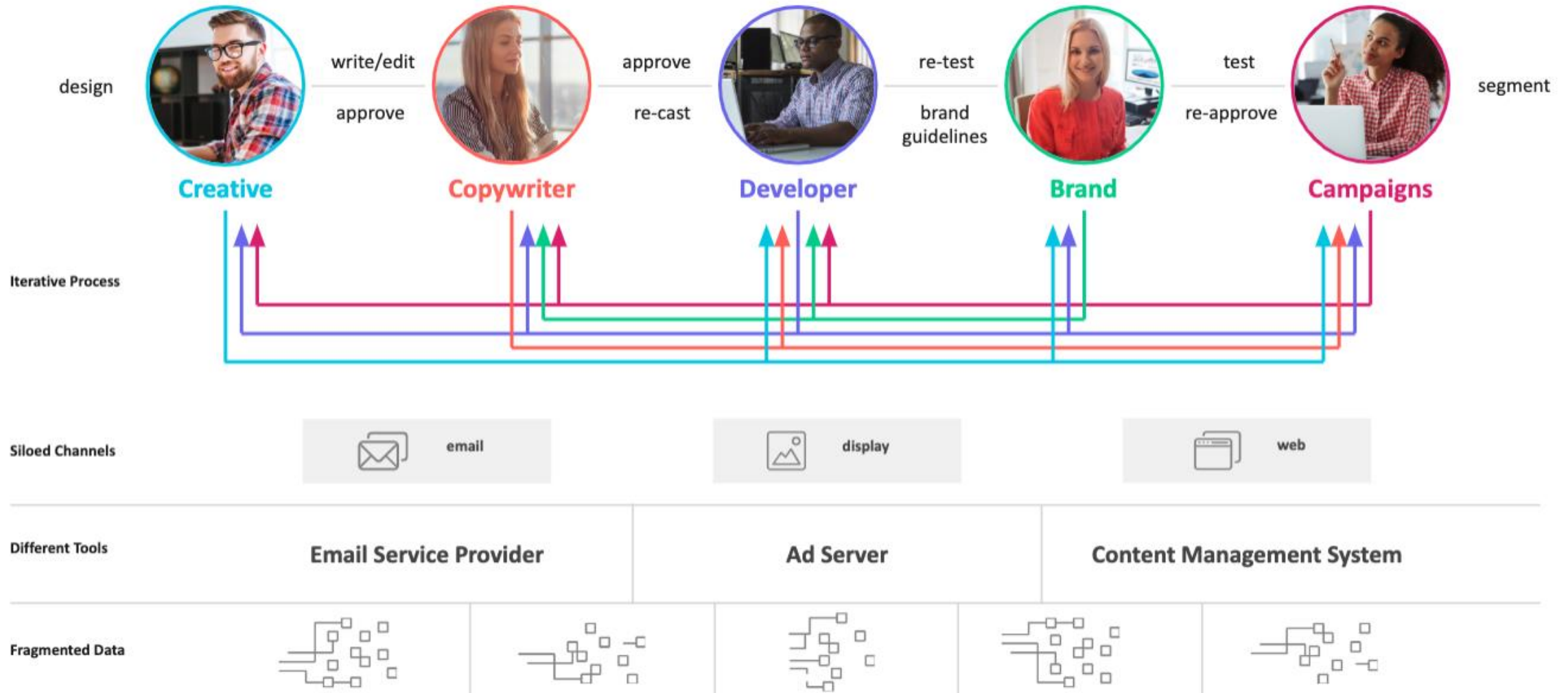
Email Production (cont.)

For each email sent, how much time is spent on the following tasks?



Software solutions that solve for **efficiencies** by creating truly **reusable content** can slash production time across all email streams, freeing up time for **planning** and **analyzing** performance.

The Challenge: Can't Generate Enough Content



Email List: Personalization

Personalization is the optimizing of experiences and messages to **individuals** themselves – not the group they belong to

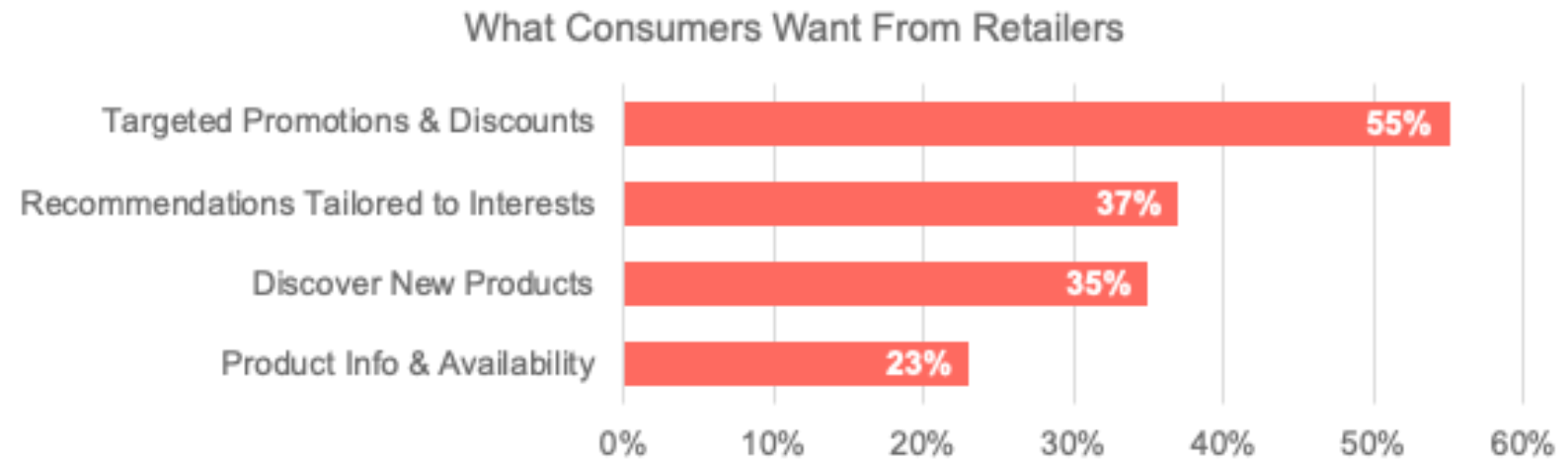
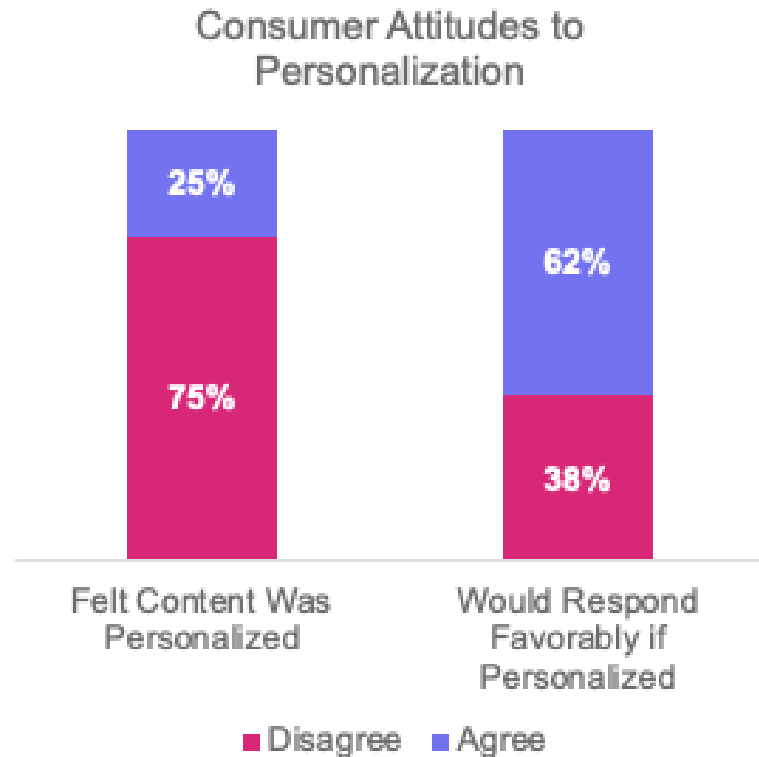
Consumers largely do not feel the marketing content they receive via email is personalized to **individual behaviors**



True personalization – 1:1 messages – are the holy grail, and are achievable through **dynamic content** that allows marketers to create one email, but customize blocks of it for certain subscribers

To personalize emails, you have to know your customers. That means you have to **collect data on an ongoing basis** and as information rolls in, use the data to build personas

Email List: Personalization *(cont.)*



Only 25% of consumers in North America feel email content is personalized, but 62% would respond favorably to personalized content

Making the Most of Your Existing Investments: Your Tech Stack

What do senior executives worldwide think is essential to implementing a digital strategy?

48%

Encouraging cross-functional collaboration



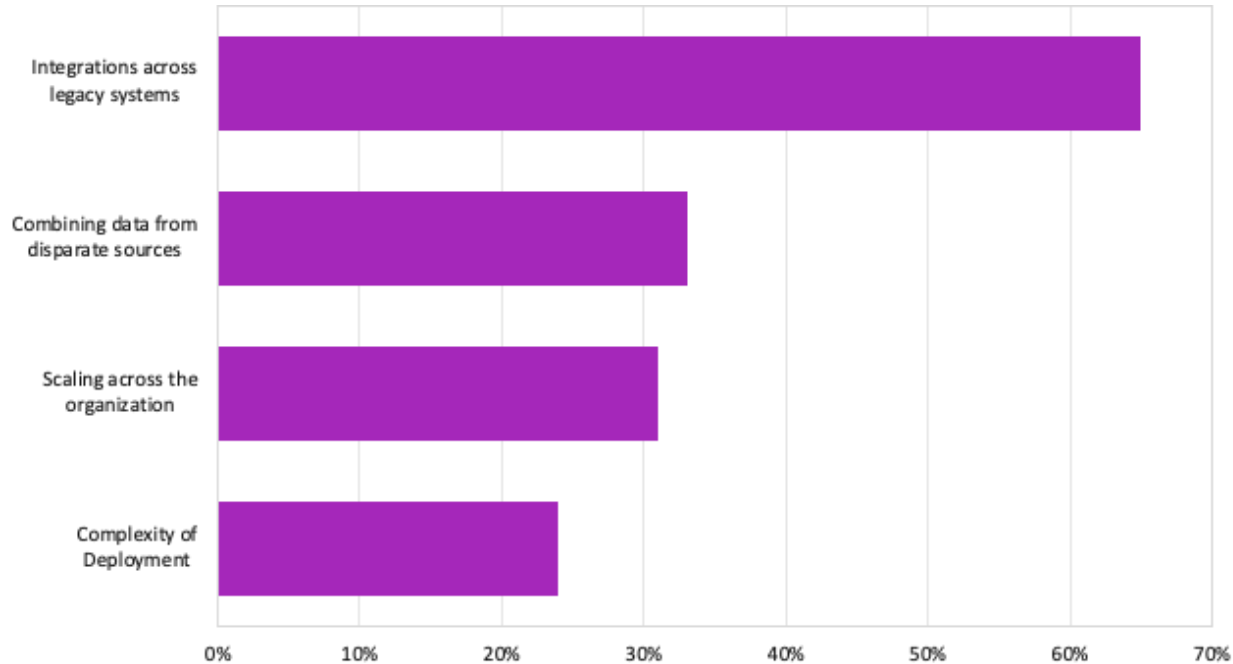
What are the biggest challenges faced by solutions providers?

48%

Getting face-to-face with decision-makers

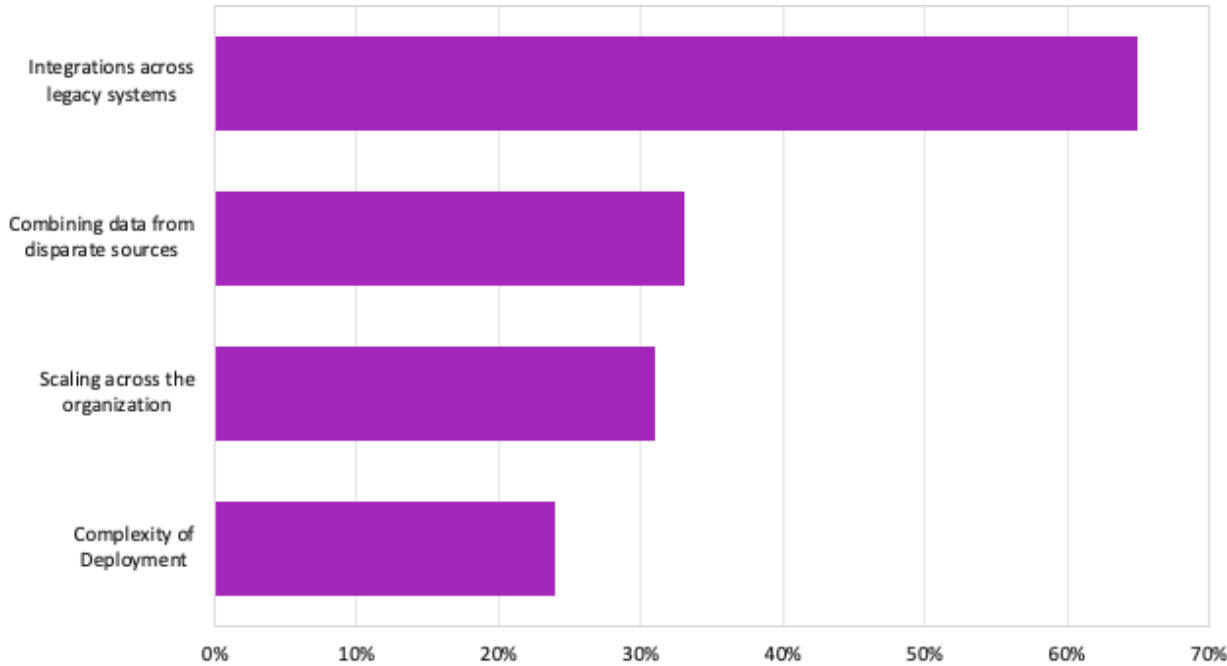
Unlocking Value from Your MarTech Stack

Challenges in activating technology



Unlocking Value from Your MarTech Stack

Challenges in activating technology



Loyalty API



Inventory API



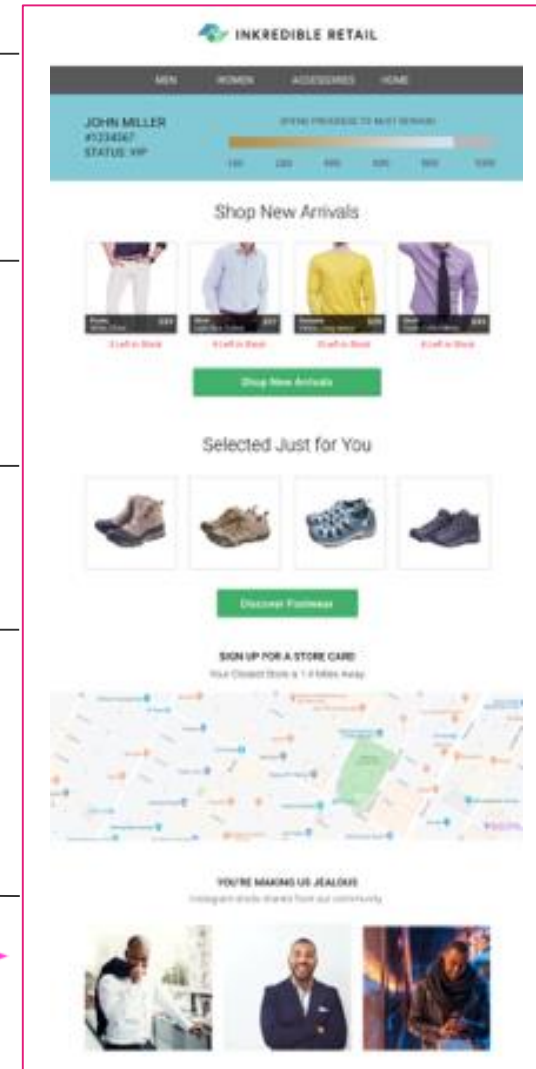
Recos API



NBA API



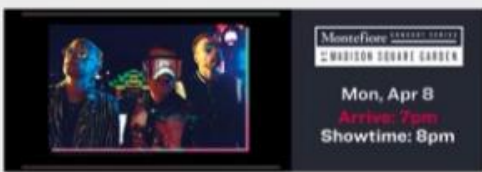
UGC API



Location API



Integrated APIs



MUSE
Simulation Theory World Tour with special guest Walk The Moon

Arrive 60 Minutes Early

If you're not in line early, you risk missing the start of the show. Get the MSG app. Get in faster.

General Admission Info

If you're a General Admission ticket holder, please see below "Where to Enter" section.

*Accessible entrance

Leave Bags Behind

If possible, leave your bags behind. The bigger the bag, the longer the delay.

Get in Faster

Download the MSG app to use the App Express Lane, which opens 15 minutes prior to doors to the general public.



What's Next...



Anderson .Paak & The Free Nationals
May 30
Madison Square Garden

VAMPIRE WEEKEND



Vampire Weekend: Father Of The Bride Tour
September 6
Madison Square Garden



VULFPECK with The Fearless Flyers
September 28
Madison Square Garden

[SEE FULL CALENDAR](#)

*If you require assistance please use our accessible entrance at 8 Penn on the corner of 31st St and 8th Ave.

Get to your seat faster
Enroll for free online and finish at The Garden in minutes. [GET CLEAR](#)

MUSE
Simulation Theory World Tour with special guest Walk The Moon

HELPFUL SHOW INFO
Mon, Apr 8

92h:53m:23s
'til you need to take your seat

New York, NY
47°F & Partly Cloudy

7 pm arrive **8 pm** showtime

Book show parking with ParkWhiz

Your suggested entrance
You're in Section 117! For faster entry use the Chase A or Chase B entrance on 31st St & 8th Ave. [Click here](#) for more info.

Get to your seat faster
Enroll for free online and finish at The Garden in minutes. [GET CLEAR](#)

Challenge: Create a personalized, visual experience for ticket holders

Solution: Tap into APIs and data sources to create fully automated, 1:1 experiences

1:1 data visualization with personalized timer, weather, showtime, seat location, and more

-98%
decrease in production time




Challenge: High cart abandonment rates

Solution: Visual reminder of items a customer browsed

Checking Us Out?

You have **great taste!**

We noticed you admiring some of our most popular items. Be sure to add them to your shopping cart before they sell out.



continue shopping

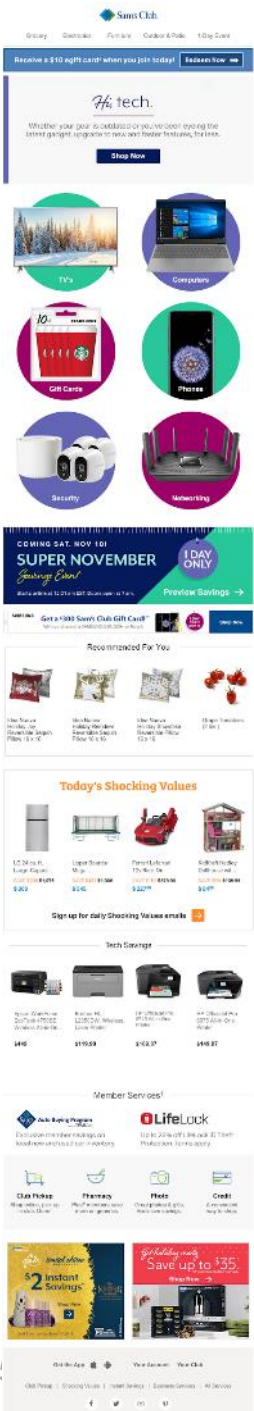
Behavioral targeting that pulls in the last items a customer browsed

+488%

Lift in CTR

+266%

Lift in conversions




— Real-time prices, inventory, and images generated at the moment of open


Challenge: Lack of time and resources to create personalized experiences

Solution: Leverage modular, reusable templates


Recommended For You




Idea Nuova
Holiday Joy
Reversible Sequin
Pillow 16 x 16



Idea Nuova
Holiday Reindeer
Reversible Sequin
Pillow 16 x 16



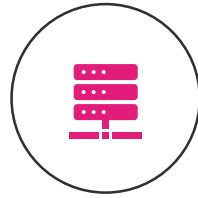
Idea Nuova
Holiday Snowflake
Reversible Pillow
16 x 16



Grape Tomatoes
(2 lbs.)

-71%

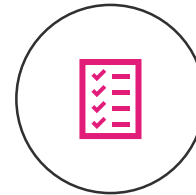
Decrease in
production
time



Combine zero, first, second, and third-party data to build your customer record



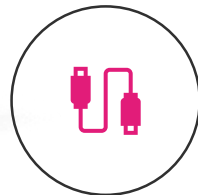
Use personas, segments, and models to help scale



Template systems are critical for designing for personalization: they're a design once, code once solution



Software solutions that solve for **efficiencies** by creating truly **reusable content** can slash production time across all email streams, freeing up time for **planning** and **analyzing** performance



Focus on unlocking value from your MarTech stack



Questions?