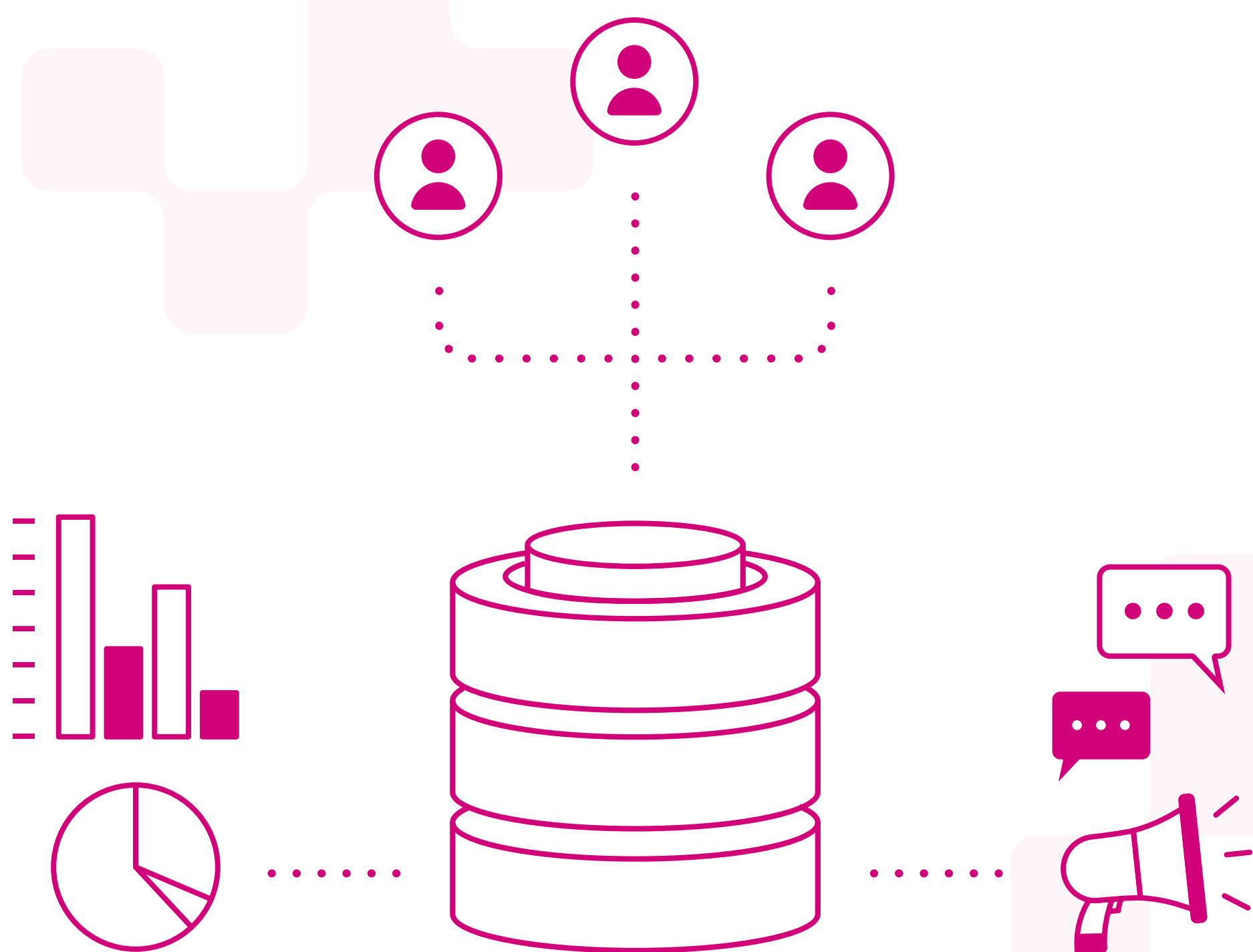# Simon

Mastering the 4 stages of the marketer's **personalization journey**

A guide to the four key stages marketers must master to effectively turn customer data into meaningful experiences.

When composing marketing messaging, especially personalized content, the standard definition of personalization is often limited to using contact properties.

But true personalization extends far beyond just the message. Unfortunately, most tools in the market today do a poor job of addressing this broader concept.

Personalization is a buzzword in MarTech these days, but the typical usage tends to over-fixate on recommender systems, like those on Amazon and Netflix. While recommendations are certainly an effective technique for generating personalized content, the journey to truly custom-tailored messaging is much broader. It begins well before populating fields in a template.

The essence of personalization involves answering these critical questions:

1. **How do I send a message at the right time?**
2. **To the right person?**
3. **Through the right channel?**
4. **With the right content?**

While the order of these questions might seem unusual, I chose to list them this way on purpose. This structure underscores a concept I call the marketer's personalization journey.

> Great personalization works when you have the right capabilities and behavioral and data context. Many marketing tools provide the capabilities, but fewer capture all the necessary context to enable deep personalization. Critically, you need a single tool to maintain this context seamlessly from end to end.

4 stages of the marketer's personalization journey

When considering personalization, marketers need to understand the customer data in front of them, such as:

01. Contextual data

- What customer activities triggered the message?
- What did the session look like, and how did it start?
- Where did a new user registration come from, and what referred them initially?
- For a purchase or an abandoned cart situation, consider what items your customer added to their cart

02. Segmentation

- What attributes of their customer profile placed them in a specific segment?

- What other attributes should be used to build the message?

Hint: This involves segmenting on aggregated customer data and being able to pull out raw contributing events.

03. Coordination and experimentation

- Which campaigns are your customers involved in?

- Which experimental treatments have they received in the past, and which should they receive now?

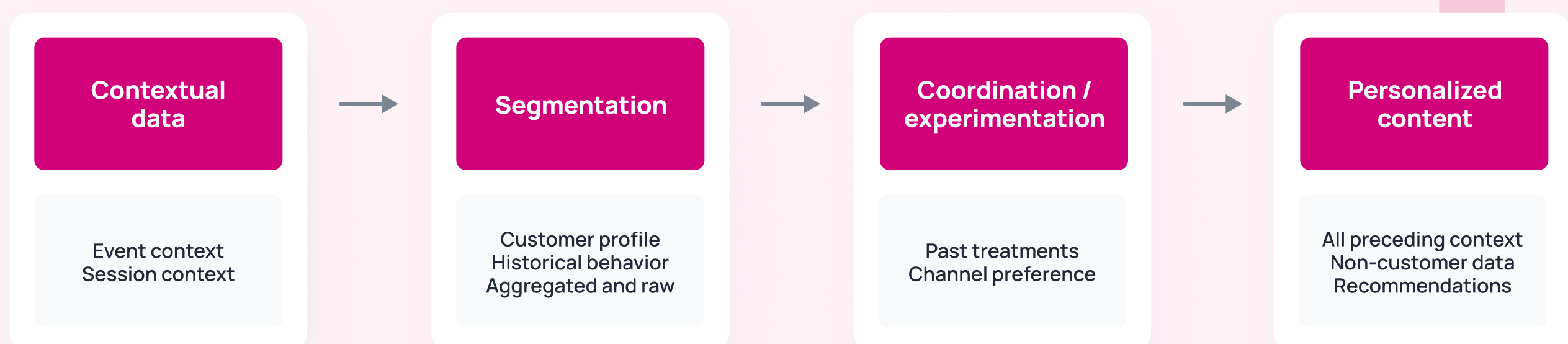- What channels do they respond to best?

04. Personalized content

- What are the full details of the items they browsed or left in their cart?

- What promotions are running right now?

- What are the full details of items I should recommend, given all of the above?

> When sending a message, you need to know all the context that precipitated it.
> This is why threading that context through the journey is essential!

The marketer's personalization journey

Contextual data		Segmentation		Coordination / experimentation		Personalized content
Event context Session context	→	Customer profile Historical behavior Aggregated and raw	→	Past treatments Channel preference	→	All preceding context Non-customer data Recommendations

Now, let's walk through each stage in the journey and explore how it impacts personalization in your marketing strategy.

Stage 1: Contextual data

Capturing behavior is the baseline for any effective personalization strategy.

But all too often, event data is lost as context for messaging. To ensure effective personalization, your event capture must propagate raw, unaggregated event context down the journey to message hydration.

Consider these examples of critical event triggers:

Item SKUs left in an abandoned cart

Knowing exactly which items were left behind can tailor follow-up messages to encourage completion of the purchase

Browsing history before new user registration

Understanding what products or services interested a user before they signed up can personalize their welcome experience

Initial referrer into a converting session post-purchase

Recognizing the source of conversion can help in crafting thank you messages and future engagement strategies

Timeliness is essential to maintaining the high intent that makes triggered messaging so effective.

It's not just about the trigger itself but also about gathering all the surrounding context: items in the cart, the initial referrer of the session, and major parts of the application the customer interacted with. These key attributes enable a personalized response downstream.

In addition, there are significant advantages in using event-triggered flows over high-latency segment-triggered flows:

Performance boost

Event triggers perform 100% better without an increase in unsubscribes

Higher conversion rates

Triggered abandonment journeys see up to 3x higher conversion rates and a 24% higher open rate compared to single messages

Case study: A luxury fitness club's onboarding journey with Simon Data

A luxury fitness club faced significant challenges coordinating member communication across multiple systems — app, email, SMS, and more. These systems operated independently, lacking user interaction context from one another.
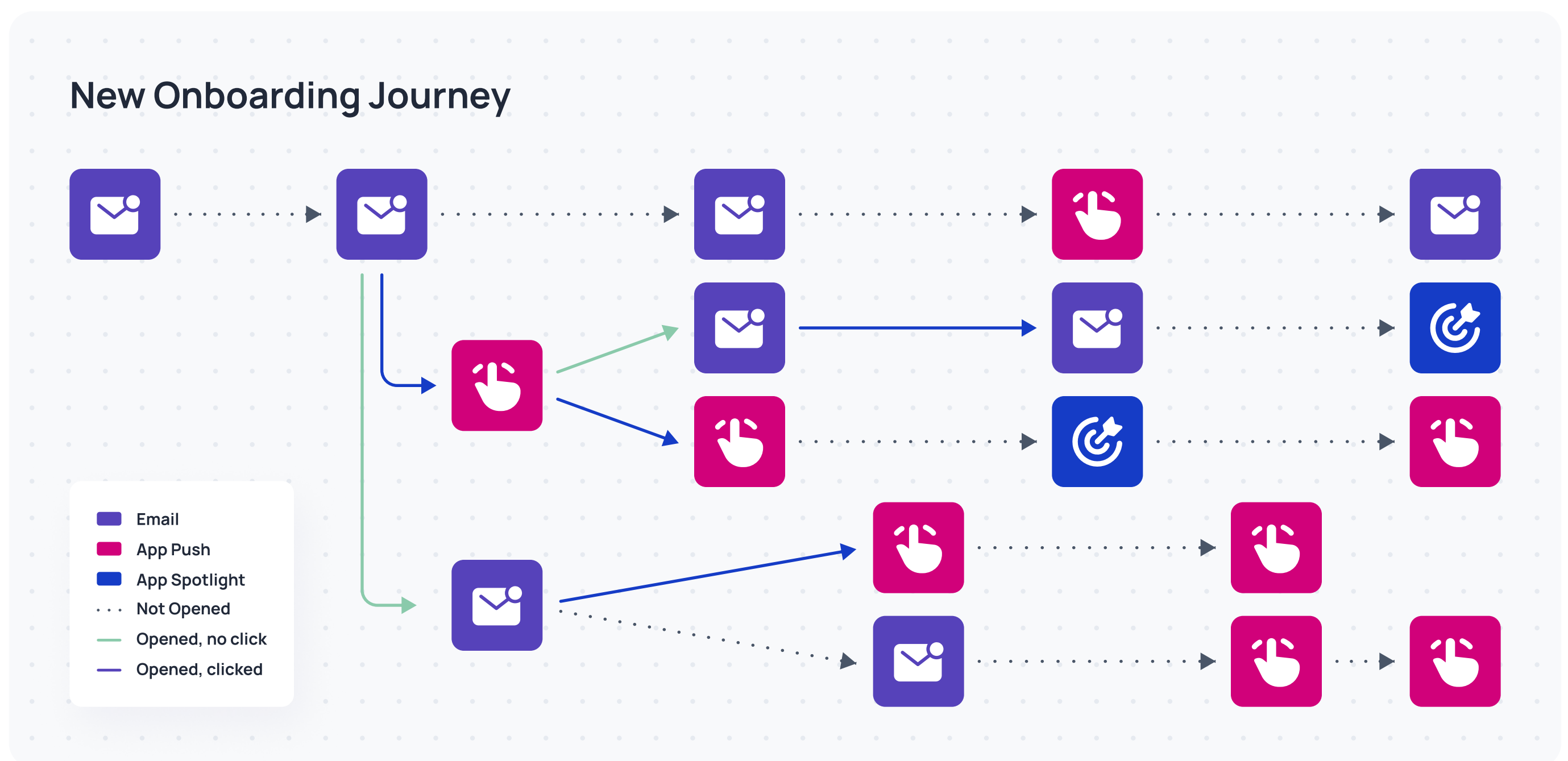
Onboarding is a critical moment in the club's member lifecycle. The club identified it as the highest-leverage experience for increasing retention and lifetime value, which is crucial for hitting its growth goals.

Previously, its onboarding series involved sending between 7-12 messages to new customers within the first seven days of their membership. This approach resulted in many redundant touchpoints, as the user's previous behavior or response rarely informed the following message.

Transforming onboarding with contextual triggers

With a CDP in place, the club's revamped onboarding journey now captures the context of each user's interaction with each triggered message, enabling informed, automated decisions about the best following message.

For instance, if members schedule their fitness assessment at any point, they no longer receive messages promoting the free fitness assessment. Previously, new members who had already signed up for the evaluation would still receive redundant messages.

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New Onboarding Journey

Legend:
- Email
- App Push
- App Spotlight
- Not Opened
- Opened, no click
- Opened, clicked

This seamless maintenance of context, as described, allowed the fitness club to achieve deep coordination and personalization. The results were significant:

Increased coordination:

Messages were no longer redundant, reducing user frustration and increasing engagement

Enhanced personalization:

Every interaction was informed by the previous one, creating a coherent and tailored onboarding experience

The club saw impressive results quickly, underscoring the importance of gathering and coordinating as much customer context and data as possible. This case makes a strong argument for maintaining a comprehensive context to unlock the full potential of personalization.

Now, let's dig into how segmentation plays a vital role in the marketer's personalization journey and how it can be effectively implemented.

Stage 2: Segmentation

Building audiences based on contact properties is the baseline for any segmentation strategy. However, the ability to form dynamic behavioral aggregates is much rarer, and the capacity to pull the full context of triggering events is virtually unheard of but essential for downstream personalized messaging.

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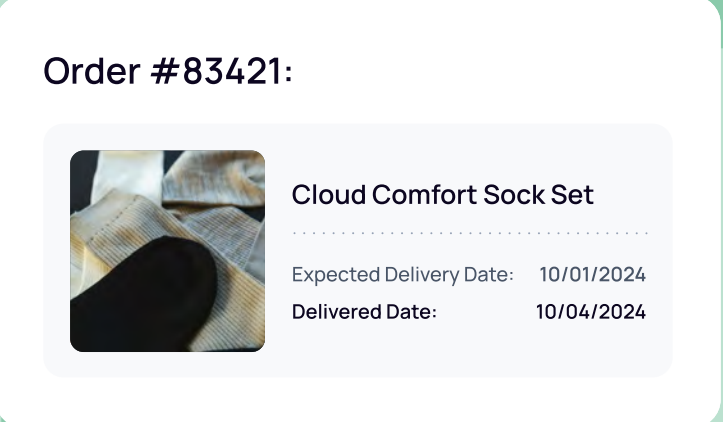Here are some examples where deep context enhances segmentation.

Exclusive segments

Suppose a contact is in an exclusive segment of taste-makers when leaving product reviews. To personalize effectively, you need to know which product reviews were their most recent.
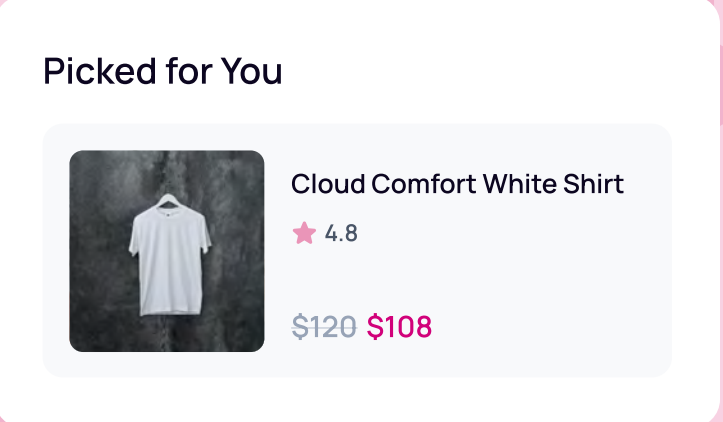
Issue impact

If a contact was affected by a delivery issue in a specific geographic region, which is noted in your customer support tool, it's crucial to understand the exact content of the impacted delivery.
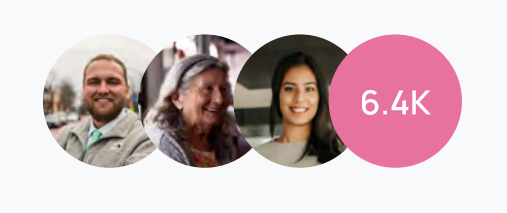
Recent interactions

When recommending similar items to recently active contacts, knowing the specific items they interacted with recently can drive more relevant recommendations.

Segmentation serves different purposes, whether for triggered campaigns or ad-hoc, scheduled, or recurring blasts. With triggered campaigns, segmentation acts as a router, linking triggered customers to the right campaign.

For non-triggered messages, the goal is to define segments large enough to justify the marketing effort but small enough to allow deep personalization in the actual message.

Requirements for effective segmentation tools

For segmentation tools to be truly effective, they need to meet several criteria:

Seamless integration with customer data

Self-service capabilities

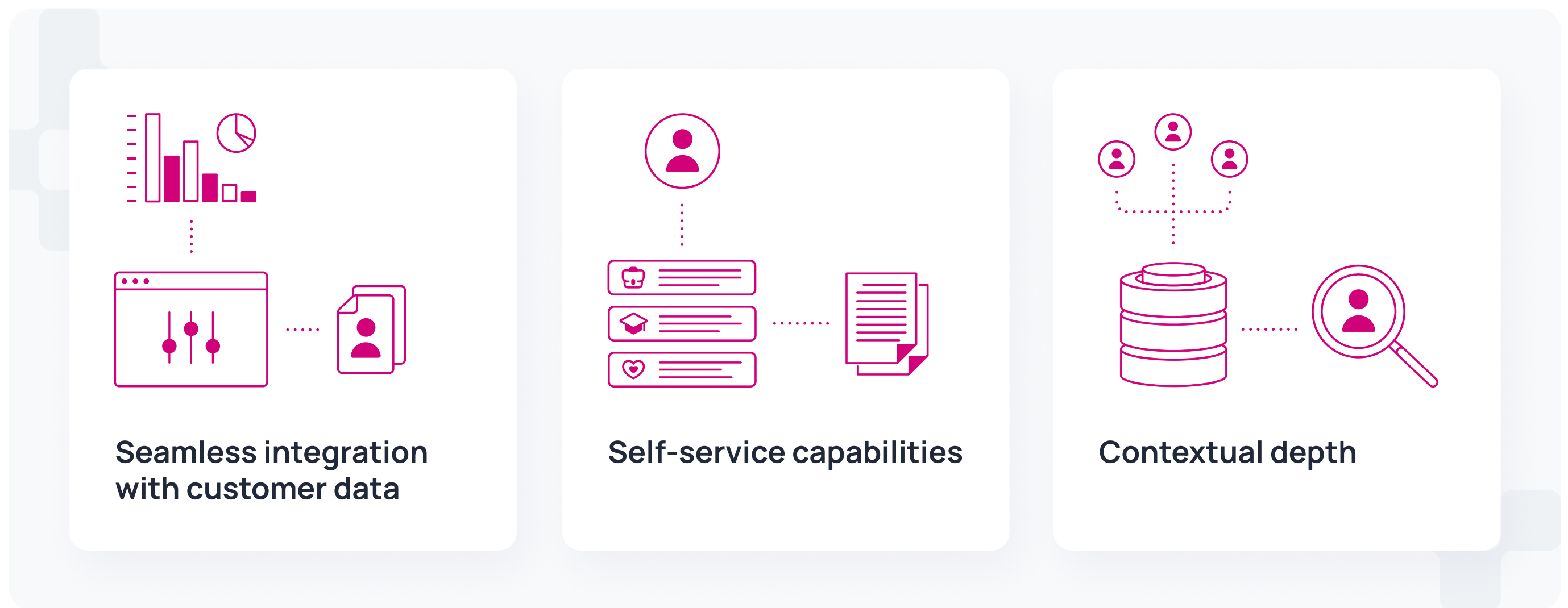Contextual depth

1. Seamless integration with your data

The tool must work across both real-time and historical data

2. Self-service capability

Marketers need to self-serve without relying on the data team for CSVs of customers meeting specific criteria. They should be able to interact with the data, build intuition, and manage numerous business rules and fine-grained segmentation details independently

3. Contextual depth

The segmentation tool cannot operate solely on aggregated data to achieve deep personalization. For example, if a segment comprises active users with more than 10 listing interactions in the last day, it's crucial to identify which specific listings each user interacted with for downstream personalization

The impact of advanced segmentation in marketing strategies

At Simon, we've observed that moving from broadly defined to highly targeted segments can dramatically increase conversion rates, ranging from 5 to 20 times higher.

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One of our clients transitioned from fewer than ten segments to nearly 1,400 active segments after gaining access to no-code segmentation tools. This transformation enabled them to create highly targeted and personalized segments, significantly boosting their marketing effectiveness.

Segmentation, when executed with precision and depth, becomes a powerful tool in the marketer's personalization journey. It ensures that every message sent is relevant and tailored to the individual's specific context and behavior.

After implementing segmentation, marketers must tie together the various elements of personalization to ensure consistency and relevance across all touchpoints.

Stage 3: Cross-channel coordination & experimentation

In digital marketing, the true power of personalization lies in effective experimentation and cross-channel coordination. These elements are layered over audience definition and campaign orchestration, allowing marketing teams to learn from past campaigns and tailor future efforts to individual preferences and behaviors.

Personalization at the orchestration level means custom-tailoring channel preferences, send times, and messaging cadences and sequences to individual contacts. Here are a few examples:

Preferred messaging channel

Understanding whether a contact prefers email, push notifications, or SMS can significantly improve engagement

Optimal message receipt time

Sending messages when a contact is most likely to engage ensures higher open and response rates

Shopping style

Identifying whether a contact is a price-sensitive spender or a convenience shopper allows for tailored promotional deals and messaging cadences

Effective orchestration requires sending messages across various channels, including email, push notifications, SMS, ads, surveys, postcards, and more.

This necessitates having contact information and data stitched together through an identity model, combined with your CRM or user table, to form a comprehensive customer identity, or a customer 360.

Customer 360 Profile

Rhonda Johnsons
rhoonda.jhonsons@email.com

Email open rate	Lifetime value	Current loyalty tier	Lifetime order count
0.235	$2,388.00	Gold	12

Event History

Journey Entry: Anniversary		October 22, 2023
Cart Abandoned		September 14, 2023
Added to Cart: Brown Leather Boots		September 14, 2023
Email Clicked: New Fall Drops		September 14, 2023
Email Opened "New Fall Drops"		September 14, 2023
Email Delivered: Birthday		August 15, 2023
Product Viewed		August 2, 2023
Page Visited: Women's New		August 2, 2023
Google Ad Clicked		July 20, 2023
Journey Entry: Birthday		July 15, 2023

Information

Key	Value
Account Created	October 24, 2022
Date of Birth	August 15, 1994
Country Code	US
Push Opt-In	TRUE
Email Opt-In	TRUE
App Installed	FALSE
Total Order Count	3
First Order Date	October 24, 2022
Last Order Date	December 1, 2023
Average Order Value	52.69
All SKUs Purchased	["202372718", "203243787", "204197158"]

Cross-channel experiments empower you to compare and contrast different channels, messages, customers, and triggers across campaigns. This is a powerful tool for identifying the best-performing campaign treatments or correlating customer properties with their responses to various treatments, thereby building smaller, more targeted segments.

> Learning from your marketing experiments is a critical input for ongoing personalization efforts, as understanding the context of past campaigns helps set the context for future messages.

The impact of marketing experimentation

Experimentation is more important to marketing strategies than brands think, and, in marketers' day-to-day activities, it's often placed on the backburner.

But how will you know what messaging (and how to deliver it) is truly effective if you don't experiment? This is an often overlooked benefit of using a CDP.

At Simon, our customers can experiment with their campaigns. Here are the results they've seen:

Performance lift:

Experimentation can drive up to a 63% lift in campaign performance, with more variants under test leading to dramatic increases in effectiveness

Enhanced customer journeys:

Campaigns using both push and email messaging see a 260% boost in conversion rates compared to those composed only of emails

But don't take our word for it — here's a story about how one company used our CDP to drive better cross-channel coordination and marketing experimentation.

Case study: A meal service delivery's seamless cross-channel coordination

A meal delivery service company provided an impressive example of cross-channel coordination and contextual campaign routing. Striving to create an exceptional customer experience across their organization, the org heavily utilizes email, push notifications, and SMS. Initially, SMS was primarily used for marketing rather than transactional messaging.

It launched an innovative SMS program to create a seamless experience between its in-app and onsite chats and new SMS capabilities.

Customers could reply to SMS messages to speak with an actual person, facilitated through Twilio's SMS API for sending automated texts. However, replies needed to reach the customer service team to ensure a seamless conversational marketing experience.

Here's how it worked:

Message parsing:

When an SMS is received, it's parsed via webhooks. If the message is an opt-in or opt-out, auto-responses handle these, updating the subscription status accordingly

Customer support integration:

For other messages, a webhook creates a ticket in Zendesk, including the person's email, phone number, and message content. This allowed the customer service team to respond, tag the customer as needed, and update their profile with this context

This system enables cross-channel and cross-function coordination, creating a seamless customer communication experience.

Marketers can manage everything within Simon without switching between SMS and customer support tools, and customer service can rely solely on Zendesk to track and respond to inquiries.

Ultimately, effective experimentation and cross-channel coordination are at the heart of successful digital marketing campaigns. By leveraging these strategies, you can achieve deeper personalization, significantly improving campaign performance and customer satisfaction.

Now, let's delve into the final stage of the marketer's personalization journey: delivering personalized content that resonates with your audience.

Stage 4: Personalized content

To achieve true personalization, your templating tool must be capable of integrating:

Event data	Segment data	Experimental context	Channel preferences
Information about recent customer interactions and triggers	Detailed segmentation criteria and context	Insights from past campaigns and A/B tests	Customer's preferred communication channels and optimal send times

Moreover, it should enrich messages with non-contact data, such as:

✓ **Product information:** SKU details, images, and current pricing

✓ **Service availability:** Booking and inventory availability, translations, and product recommendations

✓ **Offer management:** Coupon codes, available discounts, and promotional deals

> The final stage of the personalization journey is dynamic message templating. This is where all the gathered context — events, segments, experiments, and channel preferences — converges with the marketer's creativity to produce highly personalized messages.

Time-sensitive data is crucial for accurate personalization. For example, the tool should be able to fetch the latest product catalog through an API and ensure that the recommended items are in stock. Consistency in producing outbound content across different message templates and data exports is also vital.

Integrating context in messages

Templates should blend all gathered context. Here's how we define all the pieces of this gathered context.

- **Event triggers:** Context in which triggers occurred
- **Segmentation:** Unaggregated matching criteria context
- **Cross-channel campaigns:** Coordinated messaging across various channels
- **Experimental treatments:** Insights from past experimental campaigns

These elements meet in the message with recommenders:

- **Collaborative filtering:** "People who bought X also bought Y"
- **Similarity recommendations:** "See more items like…"
- **Personalized recommendations:** "You might also like…"
- **Recent Items:** Browsing history and recent interactions

Access to non-customer data, such as product catalogs with listing images, titles, descriptions, and current prices, is essential. This data often needs to be dynamically rendered on the client side, enabling dynamic content optimization.

The impact of personalized marketing campaigns

Based on Simon's customer data, customers who maximized their personalization strategies using these data points saw a massive boost in conversion rate. On average, campaigns with more than two in-message personalization elements see a 6x increase in conversions. Simon customers also see a 2x increase in click-through rates (CTR).

Case study: A wine retailer's innovative recommender system

Let's look at how a wine retailer demonstrates the power of advanced templating in a highly regulated space: online alcohol sales. Its goal is to match great wines with the right customers, considering regional legal restrictions, available stock, and customer preferences.

The brand's recommender system is sophisticated, involving:

- **Customer preferences:** Similarity between users and wines
- **Explore vs. exploit:** Balancing serendipitous recommendations with predictable favorites
- **User ranking:** Individual taste profiles
- **Implicit data:** On-site interactions like browsing history, abandoned carts, and message engagement
- **Regulations and availability:** Compliance with regional laws and stock availability across partners.

Previously, its marketing team had to craft campaigns that considered all these factors manually. Now, with CDP's advanced templating tools, recommendations are readily available through lookup tables. This automation allows the marketing team to focus on creativity and experimentation, incorporating recommendations seamlessly into various campaigns.

Bringing the power of personalization together with GenAI

Dynamic message templating is where the full potential of personalization is realized. By integrating rich event, segment, and experimental context with dynamic non-customer data, marketers can create highly personalized, effective campaigns.

The most powerful capability of Simon is that all of its templating tools — Custom Contexts, Blocks, Simon Templates, and the Drag and Drop Editor — provide the full context of the marketer's personalization journey in all outbound data rendering contexts.

That means regardless of whether you are building a field for a data extension or personalizing a full-scale email template, you have not only the target contact's profile, but also:

- **Event trigger data:** The full context of the triggering event for event triggered flows and journeys
- **Contact event content:** All of the events that qualified the contact for the targeted segment, if it was a behavioral segment
- **Real-time content:** Access to any of your organization's own 1p and 2p API endpoints, serving up recommendations, inventory information, your product catalog, and more
- **Lookup tables:** Non-contact data arising from your data layer

In addition to Simon's intuitive editing and testing user interface, you also have a smart assistant to help you craft all of this dynamic context into a highly personalized template in the form of Simon's Jinja generator.

This ultimately brings together the unparalleled breadth of dynamic context from the marketer's personalization journey into an unparalleled personalization experience for your marketing team.

Want to see how Simon can help your brand deliver a 1:1 customer experience? Go to our website to learn more about the product or book a demo.

About Simon Data

Simon Data is the leading customer data platform (CDP) for enterprise customer marketing teams. Top brands such as JetBlue, ASOS, Vimeo, and 1-800-Flowers use Simon Data to centralize their customer data, build precise, sophisticated segments, and drive 1:1 personalization across customer touchpoints. Simon Data is recognized as a G2 Leader in the CDP space. Learn more about Simon Data at simondata.com.