

ACTIVATE **19**

The Growth Marketing Conference

# Evolution of Email: From Personalization to Individualization

Eva Wei  
Growth, Shift

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Presented by:  *iterable*



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# Agenda



1. Email is here to stay

2. Personalization vs. Individualization

3. Case study: Shift

# Re-engagement is key

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- Relevant and engaging content **throughout the purchase journey** is very important
- 1/3 of consumers who visit a company's website or app with the explicit intent of making a purchase **don't complete the checkout**

70%

of online carts abandoned on average

Source: Baymard Institute

92%

of 1st time visitors aren't there to buy

Source: Episerver

# Everyone uses email...how do you stand out?

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- Email is the dominant online communication channel
- How do you stand out from the crowd?
  - Personalized subject lines
  - Witty preview text
  - Strong CTAs
- **Data is the great differentiator**, separating the good from the great

281bn

emails are sent daily on average

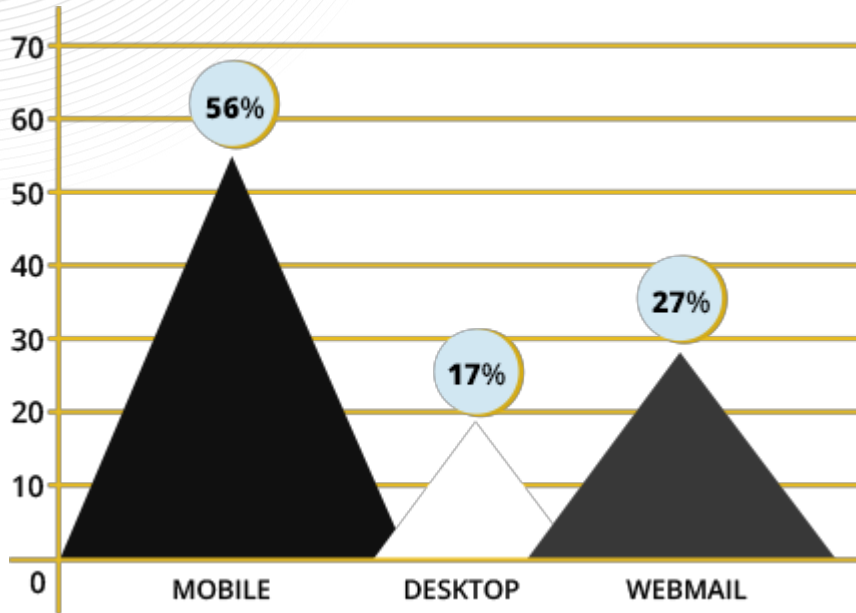
Source: Radicati Group

99%

of people check email everyday

Source: DMA Insight

# Mobile responsiveness is important



56%

of email users prefer opening email on their mobile devices

Source: Litmus

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# Agenda

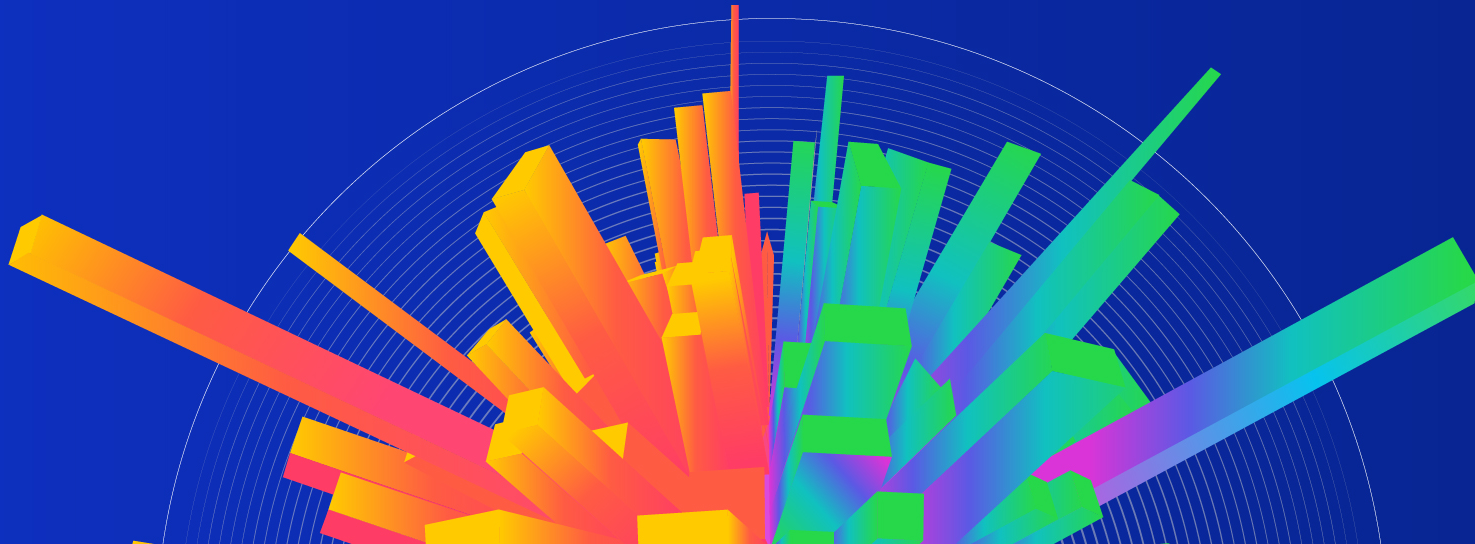


1. Email is here to stay

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What's the difference?



# Personalization...

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- ...evolved from one-size-fits-all **generic mass messaging**
  - Name
- ...to **basic segmentation**
  - Demographics
  - Stated preferences
  - Purchase (e.g. high LTV, high AOV, repeat customers, etc.)
- ...but still is held back by relying on general / **surface-level information** for the group





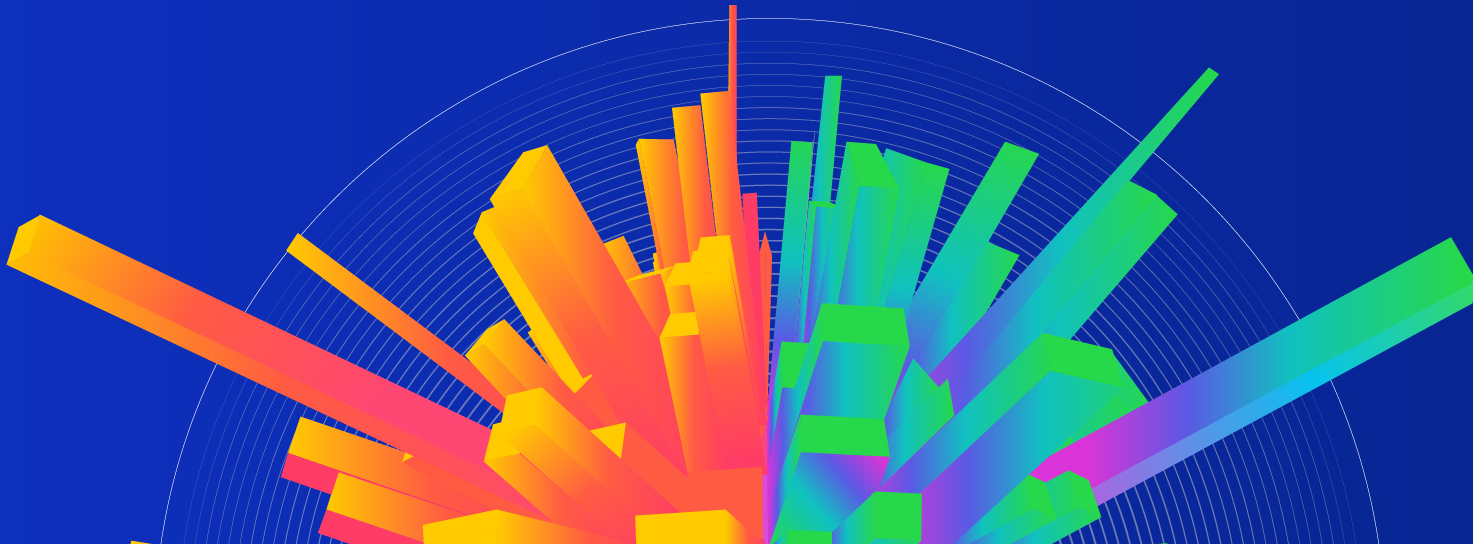
# Individualization...

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- ...evolves to deal with consumers effectively **at an individual level** and curate relevant messaging accordingly
  - Personal behavior and preferences
  - Event / engagement history
  - Item status
- ...enabling you to respond appropriately in real time to a **customer's interests, wants, needs, and identity**



Great, but how do you do that?

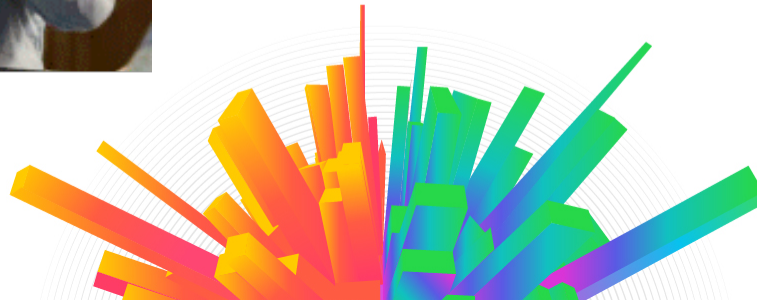


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An aerial photograph of a city, likely San Francisco, viewed from a high vantage point. A winding asphalt road with a white guardrail curves through a grassy hillside in the foreground. A white car is visible on the road. The city below is densely packed with buildings, and the background is hazy. The word "SHIFT" is overlaid in large, white, italicized, sans-serif font across the center of the image.

# SHIFT

# How Shift works

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## STEP 1



### ACQUIRE

- Free online instant estimate
- Car inspection at seller's location
- Payment on the spot
- Shift handles all the paperwork

## STEP 2



### RECONDITION

- 150-point inspection
- Repairs (if needed)
- Detailing
- Cleaning
- Professional photographs

## STEP 3



### SELL

- Listing on shift.com, Shift app, and 3rd party websites
- Test drives brought to the buyer
- Easy financing
- Shift handles all the paperwork

# SHIFT

## Heads up: a deposit has been placed on this car

Hi Marie, the 2013 Honda Civic LX that you scheduled a test drive for has just been put on deposit by another customer. While this doesn't necessarily mean that the car will be sold, the deposit does mean that the vehicle cannot be test driven until the deposit expires in 72 hours.

You can stay notified on the progress of the sale by signing up for updates on this **vehicle's page**. We'd also be happy to arrange a new test drive for a different car, just find the one you want and create a new appointment.

[Browse available cars](#)

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SHIFT.COM

855.744.3801 | 2500 Market St., San Francisco, CA 94114

# SHIFT



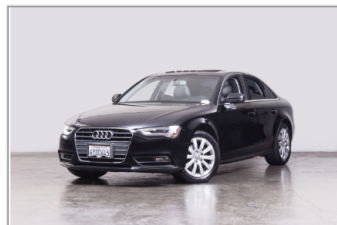
**Vehicle:** 2012 Audi Q5 3.2L Premium Plus

**Time:** 04/22/2019 10:15:00 AM

**Location:** 202 Littlefield Ave, South San Francisco, CA 94080

**Status:** Canceled

Hi Anthony, we had to cancel your upcoming test drive because the 2012 Audi Q5 3.2L Premium Plus has just been purchased by another customer. We'd be happy to arrange a new test drive for a different car. We have a large inventory at Shift and may have something similar to the one you're looking for. Check out the below, and book your new test drive today!



**2013 Audi A4 Premium**

77,236 miles

**\$9,700**



**2014 BMW X1 sDrive28i**

62,104 miles

**\$12,650**



**2010 Audi A3 2.0T Premium Plus**

51,960 miles

**\$9,100**



**2014 Audi A4 Premium**

36,343 miles

**\$15,200**

List prices do not include taxes, registration, or Shift Service fee. View the total price by selecting any car above or at [shift.com](http://shift.com).

[Browse cars](#)



**SHIFT**

855.744.3873 | 202 Littlefield Ave, South San Francisco, CA 94080

Hear from our happy customers on Yelp »

Generic field replacement

Text heavy

Static footer

# SHIFT

## Heads up: a deposit has been placed on this car

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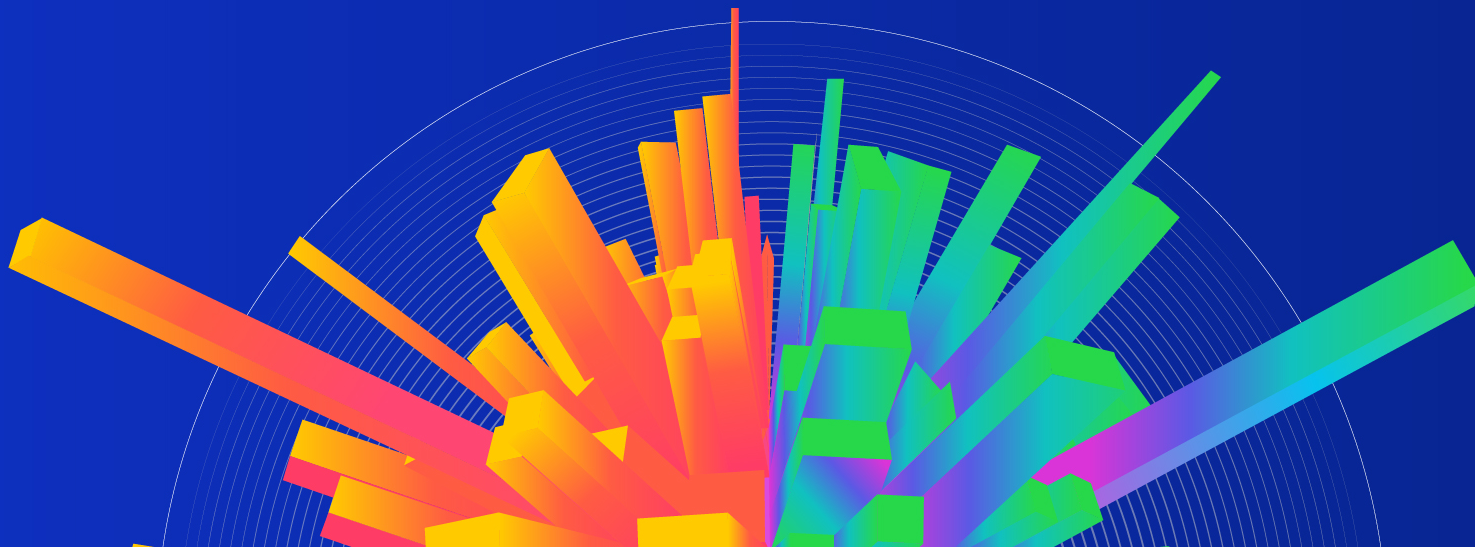


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But first, data



# Start with what information you need

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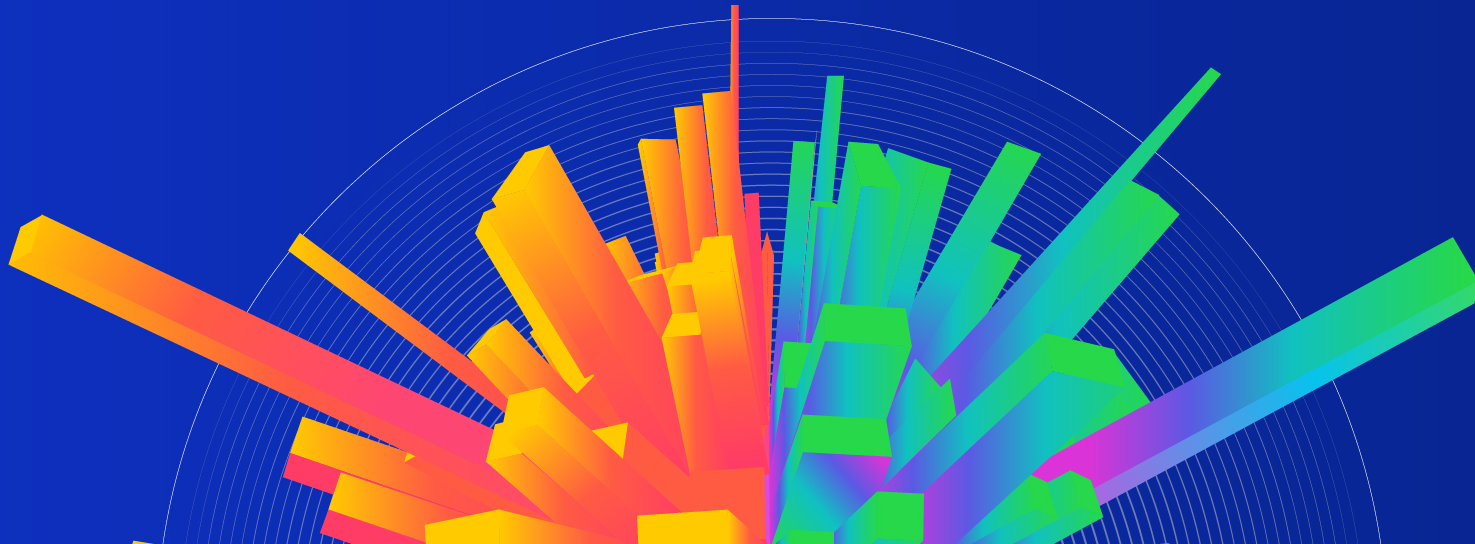
- About the customer

- Name
- Lead source
- Location
- Item(s)
- Part of funnel
- Account / cart
- Browse history
- Engagements
- Purchases
- CSAT

- About the item

- Name
- Price
- Price drop
- Characteristics (e.g. size, new)
- Features and options
- Availability / state
- Photo URL
- Similar items, complements
- # other people interested
- Time

# Tools and techniques



# Data feeds

- Access **real-time data**
- Provide recommendations based on live inventory status
- Let's get technical
  - Requires engineering to set up, in JSON, XML, RSS, or Atom format
  - Need to pass in user-specific merge parameters
  - User profile `{{}}` vs. data feed `[[ ]]`
  - E.g. `[[cars.year]]` `[[cars.make]]` `[[cars.model]]` returns "2016 Land Rover Range Rover Evoque"

Load data feed data

Similar car feed

LOAD FEED

CLEAR DATA FEED

```
Code powered by ace
1  {
2  "cars": [
3  {
4    "carid": "c169527",
5    "vin": "SALVR2BG3GH078584",
6    "link": "/car/c169527",
7    "region": "us/sfo",
8    "year": "2016",
9    "make": "Land Rover",
10   "model": "Range Rover Evoque",
11   "trim": "HSE",
12   "model_trim": "Range Rover Evoque HSE",
13   "photos": [
14     {
15       "masked": true,
16       "damage": false,
17       "studio": true,
18       "sizes": {
19         "base": {
```

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# Metadata

- **Central way** to store data fields
- Access without having to be dependent on events
- Let's get technical
  - Iterable API Explorer
  - PUT API call to insert the data
  - To update, need to include the entire object or else it overwrites
  - Insert metadata into email templates using Handlebars logic

RESPONSE BODY

```
{
  "table": "regions",
  "key": "ussfo",
  "size": 349,
  "lastModified": 1544478072000,
  "value": {
    "tradeInCredit": "300",
    "sellerDropoffCredit": "50",
    "formattedPhone": "855.744.3801",
    "formattedSellPhone": "855.744.3873",
    "seller0tsHubCredit": "150",
    "buyer0tsCredit": "100",
    "yelp": "san-francisco",
    "address": "202 Littlefield Ave, South San Francisco, CA 94080",
    "seller0tsCredit": "100",
    "buyer0tsHubCredit": "150",
    "unformattedPhone": 8557443801,
    "PWFee": "300"
  }
}
```



# SHIFT



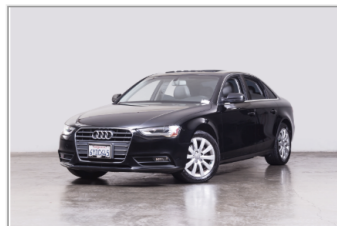
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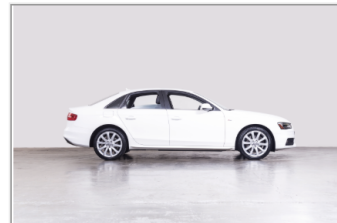
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# Handlebars

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- Show **dynamic content** based on data inputs
- Eliminates need for different templates from the same trigger
- Let's get technical
  - Helpers manipulate, format, perform conditional logic, or iterate over data
  - E.g. `{{capitalizeFirst name}}`
  - E.g. `{{#if region}}{{#metadata "regions" ...{{else}}{{#metadata "regions" "default" ...`

```
{{#if region}}{{#metadata "regions" (cut region "/" ) as |regionInfo|}}<a style="color: #9b9b9b; Text-decoration: none;" href="tel:+{{regionInfo.formattedSellPhone}}">{{regionInfo.formattedSellPhone}}</a>{{/metadata}}{{else}}{{#metadata "regions" "default" as |regionInfo|}}<a style="color: #9b9b9b; Text-decoration: none;" href="tel:+{{regionInfo.formattedSellPhone}}">{{regionInfo.formattedSellPhone}}</a>{{/metadata}}{{/if}} <span style="padding:0 10px">|</span>{{#if region}}{{#metadata "regions" (cut region "/" ) as |regionInfo|}}<a style="color: #9b9b9b; text-decoration: none;">{{regionInfo.address}}</a>{{/metadata}}{{else}}{{#metadata "regions" "default" as |regionInfo|}}<a style="color: #9b9b9b; text-decoration: none;">{{regionInfo.address}}</a>{{/metadata}}{{/if}}
```

Show different location information based on where the user is located, if known

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Toyota 4Runner SR5

2016 | 41k miles

\$30,750

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[Browse cars](#)



## SHIFT

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Presented by:  **iterable**

# Snippets

- Standardize and **re-use content** across templates
  - Headers
  - Footers
  - CTA
  - Explanations, e.g. About Shift
- Updates will flow through automatically
- Let's get technical
  - If you change the name of the snippet, you need to update in templates too

**SHIFT**

```
{{#if region}}{{#metadata "regions" (cut region "/" as |regionInfo|)}}{{regionInfo.formattedSellPhone}}  
{{/metadata}}  
{{else}}  
{{#metadata "regions" "default" as |regionInfo|}}  
{{/metadata}}  
{{/if}} | {{#if region}}{{#metadata "regions" (cut region "/" as |regionInfo|)}}  
{{regionInfo.address}}  
{{/metadata}}  
{{else}}  
{{#metadata "regions" "default" as |regionInfo|}}  
{{regionInfo.address}}  
{{/metadata}}  
{{/if}}  
  
{{#if region}}{{#metadata "regions" (cut region "/" as |regionInfo|)}}Hear from our happy customers on  
Yelp »  
{{/metadata}}  
{{else}}  
{{#metadata "regions" "default" as |regionInfo|}} Hear from our happy  
customers on Yelp »  
{{/metadata}}  
{{/if}}  
  
Unsubscribe
```

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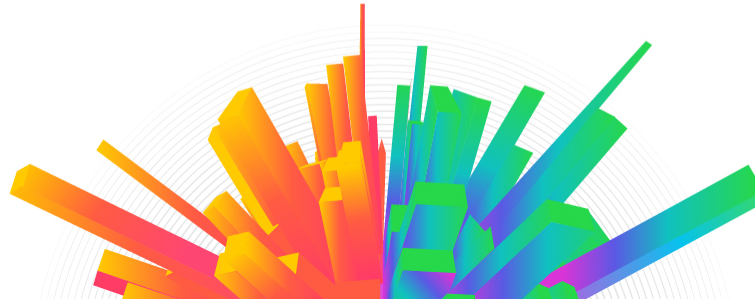
**SHIFT**

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# Other individualization tactics

- Most popular items
- Countdown timer
- Interactive elements
- Integrated forms
- Year in review
- Anniversary



## Melanie's year in review

Thanks for being part of the Lyft community and making each ride count. Cue the music and toss the confetti – here's your 2018 in numbers.



# ACTIVATE 19

The Growth Marketing Conference

## Q&A

[eva@shift.com](mailto:eva@shift.com)

Presented by:  *iterable*

