

ACTIVATE 19

The Growth Marketing Conference

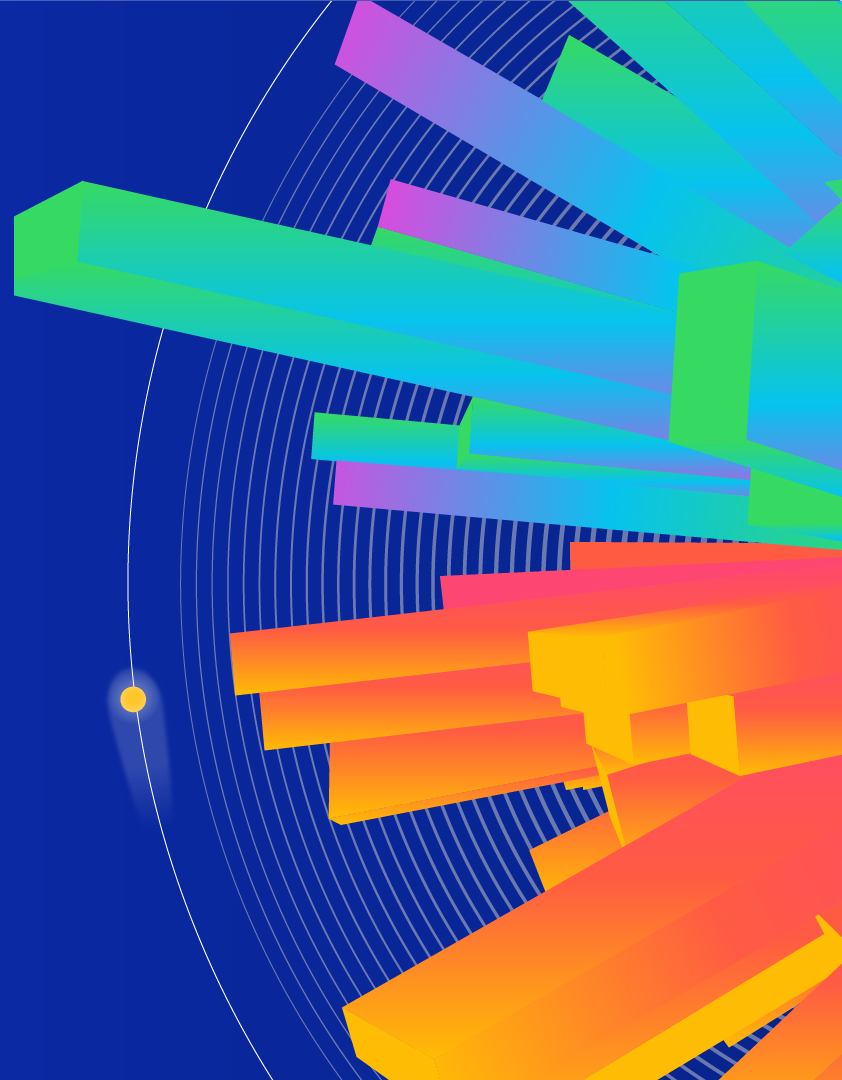
Introducing Catalog

Unlocking Personalization at Scale

Mahavir Parekh

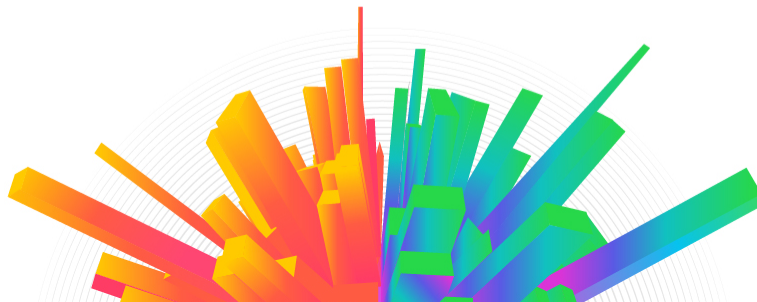
Principal Product Manager, Iterable

Presented by:  *iterable*



Agenda

1. Overview of Scalable Personalization
2. Introducing Catalog and Collections
3. Demo
4. Questions?



Personalization at Scale

What challenges do marketers face with Personalization at scale?

- Data silos between teams within the organization
- Limited engineering resources to personalize quickly
- Marketers have limited technical expertise to run SQL queries,
- Unable to leverage actionable data to tailor to each user (Personalization to Individualization)
- Datafeeds have limited use cases, not designed to scale

Image

- Datafeed from iterable
- Stock photo on engineering resources

Introducing Catalog

- **Catalog:** Metadata on your customers to unlock new ways to personalize your campaigns at scale
 - i.e. Food and Delivery app and a “restaurant” can be a Catalog
- **Collection Builder** is the visual builder to create static or dynamic collections based on custom criteria you choose
 - Static collections are criteria that are fixed in time
 - Dynamic collections search Catalog items matching values on a recipient's Iterable user profile
- **Collections** are the ordered list of items you generate from the Collection Builder to create personalized content blocks to insert in your templates.
 - Restaurants located near me (Geolocation)
 - Popular Mexican restaurants (Category)
 - Restaurants with a rating >4 (Rating)

Introducing Catalog: Collection Builder

Catalogs > Collections > RestaurantsNearUsers

RestaurantsNearUsers

SAVE COLLECTION

Catalog Restaurants **Description** 3+ rated popular restaurants near users

Must Have **EDIT** **VIEW** **↺** **↻**

Any that meet the following criteria

This

where location STATIC DYNAMIC ↔ Is Within 20 Miles of home_geo_location **✕** **✕**

and rating STATIC DYNAMIC >= Greater Than Or Equal 3 **✕** **✕**

ADD FIELD

+ OR

+ OR GROUP

Items To Show 3 **Ordered By** rating **Sorted** **×** **ASCENDING** **DESCENDING**

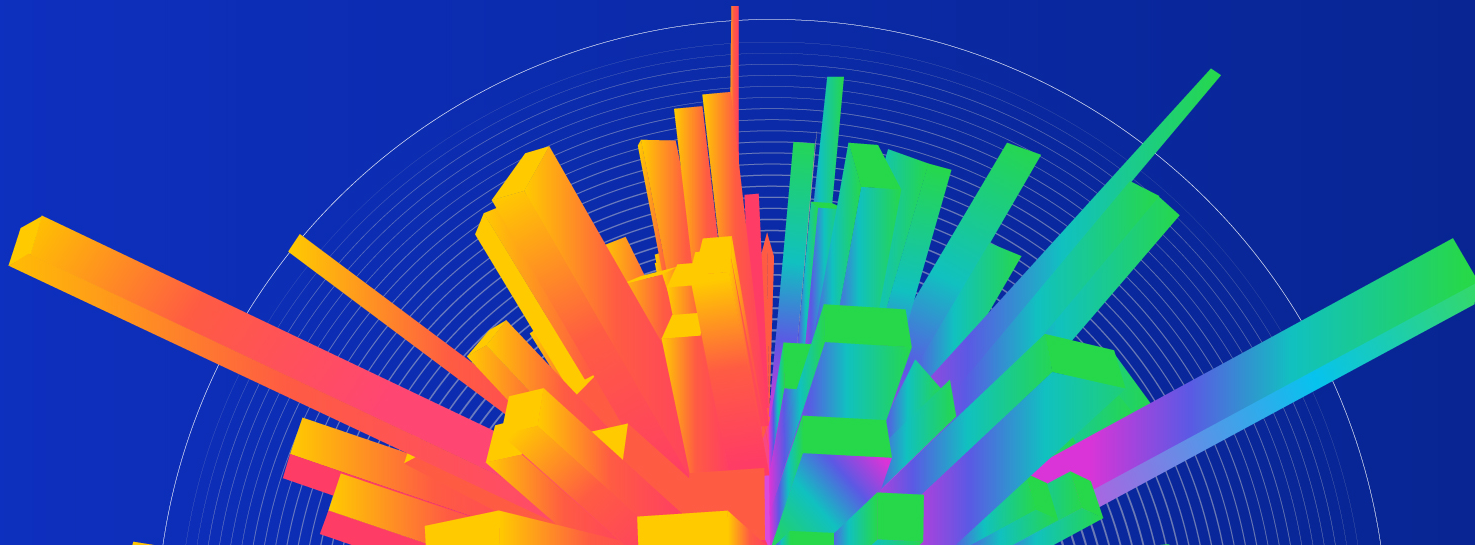
Preview Collection Results with: User Email **SAVE AND PREVIEW** **USE IN TEMPLATE**

Collections

What are Collections?

- Dynamic and Static collections

Demo Time!



Building a Catalog

- click
- Replace with video of creating a new catalog
- click

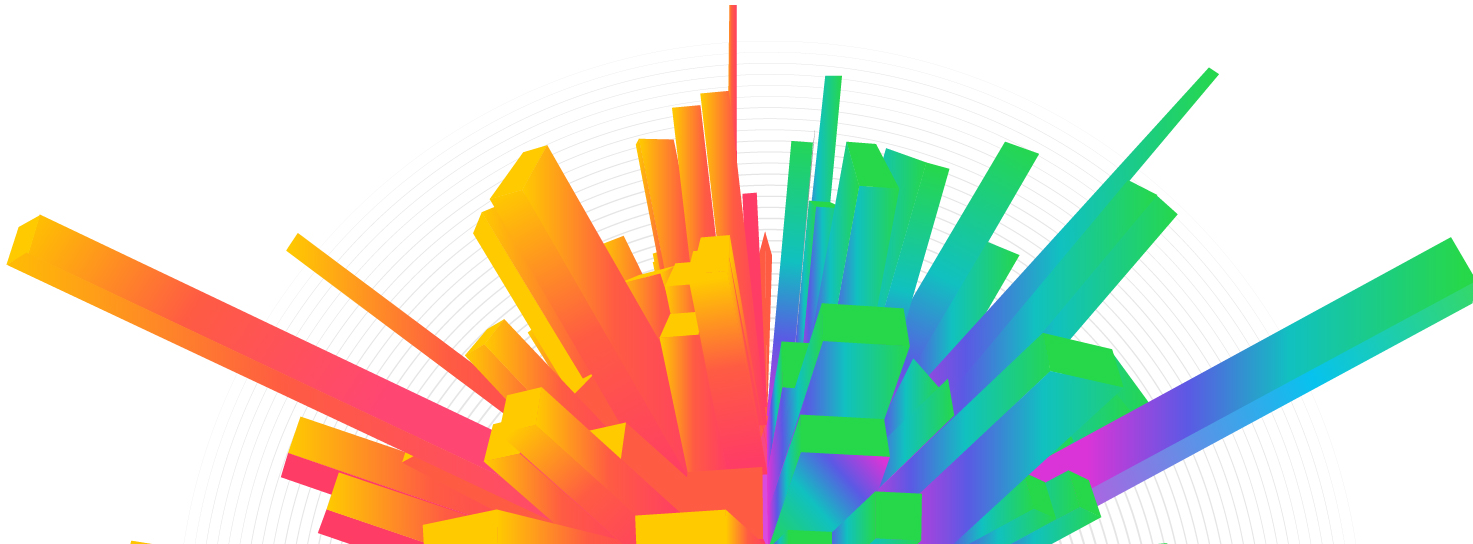
Restaurant - Metadata

```
{
  "id": "1",
  "name": "Nopa",
  "imageUrl": "http://nopasf.com/wp-content/uploads/2016/07/nopa-logo.png",
  "category": "American",
  "rating": 4.8,
  "price": 3,
  "popularityScore": 99,
  "openingDate": "2019-04-01",
  "hasDelivery": false,
  "hasParking": false,
  "isVegetarianFriendly": true,
  "ambiance": [
    "Romantic",
    "Trendy"
  ],
  "popularDishes": [
    {
      "name": "Wood Grilled Hamburger",
      "description": "Pickled Onions and French Fries",
      "imageUrl": "https://s3-media3.fl.yelpcdn.com/bphoto/_g_edzTqKtgK9_oGq6KvJA/o.jpg"
    },
    {
      "name": "Seared Duck Breast",
      "description": "Fried Wing, Purple Top Turnips, Romanesco and Strawberry Mostarda",
      "imageUrl": "https://s3-media4.fl.yelpcdn.com/bphoto/axAsTBDMdbG1a07vNRpFg/o.jpg"
    },
    {
      "name": "Country Pork Chop",
      "description": "Carrots, Brussels Sprouts and Kumquats",
      "imageUrl": "https://s3-media3.fl.yelpcdn.com/bphoto/aWrrqyTcJFvAMybm0s-w/o.jpg"
    }
  ],
  "location": {
    "lat": 37.774899,
    "lon": -122.437489
  }
}
```

Building a Catalog

- video of viewing catalog items
- expand an item

Using Collections



Successfully created RestaurantsNearUsers

Catalogs > Collections > RestaurantsNearUsers

RestaurantsNearUsers

Catalog

Restaurants

Description

Popular restaurants near users

Any - that meet the following criteria

AND

VIA

OR

NOT

Field	Operator	Value	Field	Operator	Value
where location	is Within	30	where ad	name	user_location
and popularityScore	Greater Than Or Equal	80			
and rating	Greater Than Or Equal	3			

OR

OR GROUP

Items To Show

Number of items

Ordered By

Score of item

Sorted

Preview Collection Results with

Open form

Advanced

Use in Campaign

Using Collections

The screenshot displays the Iterable Collections management interface. The top navigation bar includes the Iterable logo, a 'Foodies' dropdown, a notification bell, and a user profile for 'Iterable Users'. The left sidebar contains navigation options: Insights, Campaigns, Workflows, Templates, Users, Experiments, Revenue, Integrations, Settings, and Support.

The main content area shows the breadcrumb path: Catalogs > Collections > RestaurantsNearUsers. The collection name 'RestaurantsNearUsers' is displayed in a light blue header, with a 'SAVE COLLECTION' button to its right. Below the header, the 'Catalog' is set to 'Restaurants' and the 'Description' is 'Popular restaurants near users'. Action buttons for 'EDIT', 'VIEW', 'UNDO', and 'REDO' are visible.

The filter configuration is set to 'Any' and includes three criteria:

- where** location (STATIC/DYNAMIC) ↔ Is Within 20 Miles **of** home_geo_location
- and** popularityScore (STATIC/DYNAMIC) >= Greater Than Or Equal 80
- and** rating (STATIC/DYNAMIC) >= Greater Than Or Equal 3

Buttons for '+ OR' and '+ OR GROUP' are located below the filter list. The 'Items To Show' section is set to 'Number of items' and 'Ordered By' is set to 'Select a field...'. The 'Sorted' dropdown is set to '- ASCENDING'. At the bottom, the 'Preview Collection Results with:' field is set to 'User Email', with 'PREVIEW' and 'USE IN TEMPLATE' buttons.

Using Collections

- Replace with video of collection builder showing preview of collection

Personalized Content Block

- Replace with video of “Use in Template”
- Click
- Replace with video of “Template Builder”

Personalization at scale

- Replace with video of “Preview with Data for user A”
- Click
- Replace with video of “Preview with Data for user B”

Limitless imagination

- Replace with video of “Editing collection in collection builder”
- Click
- Replace with video of “Preview with Data for user A”

Limitless Imagination

You can create a catalog of

- Hiking or biking trails and send out campaigns with popular trails or new trails near the user
- Real estate listings and send out campaigns for open houses near you on a scheduled for a Saturday morning
- Challenges or activities and send out campaigns for trending or latest activities near the user
- Job listings and send out campaigns for trending or latest jobs near the user
- Events and send out campaigns for last minute events near the user

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Questions?

