



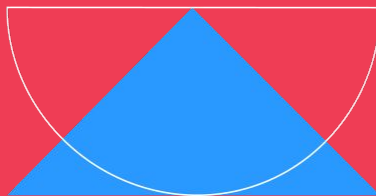
Technical and Organizational Strategies for Successfully Implementing Iterable



Session Abstract

Overview

It goes without saying that when it comes to implementing new technology, there's a lot to consider—both at the technical and organizational level. In this talk, learn useful tips and tricks for building, refining, and clarifying your implementation strategies: what to think about, which pitfalls to avoid, and how to get buy-in from all players involved. Discover new ways of thinking about implementing Iterable to ensure technological and organizational success.



Who am I?

Brian Schmidt

VP, Acquisition & Retention, ReserveBar

6X RFP Runner

5X Implementer

3X Iterable Customer

RESERVEBAR

Clutter

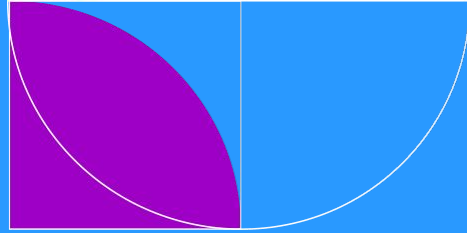
MINIBAR

Fender



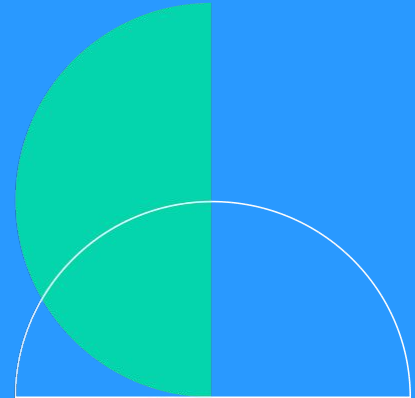
Integrations: A BS History





Initial Alignment

Before you set out on a journey, know your potential outcomes.
Is it feasible in your tech stack? In your roadmap? In your budget?
What do you gain from making the change?



The RFP

This is not a path you walk alone.

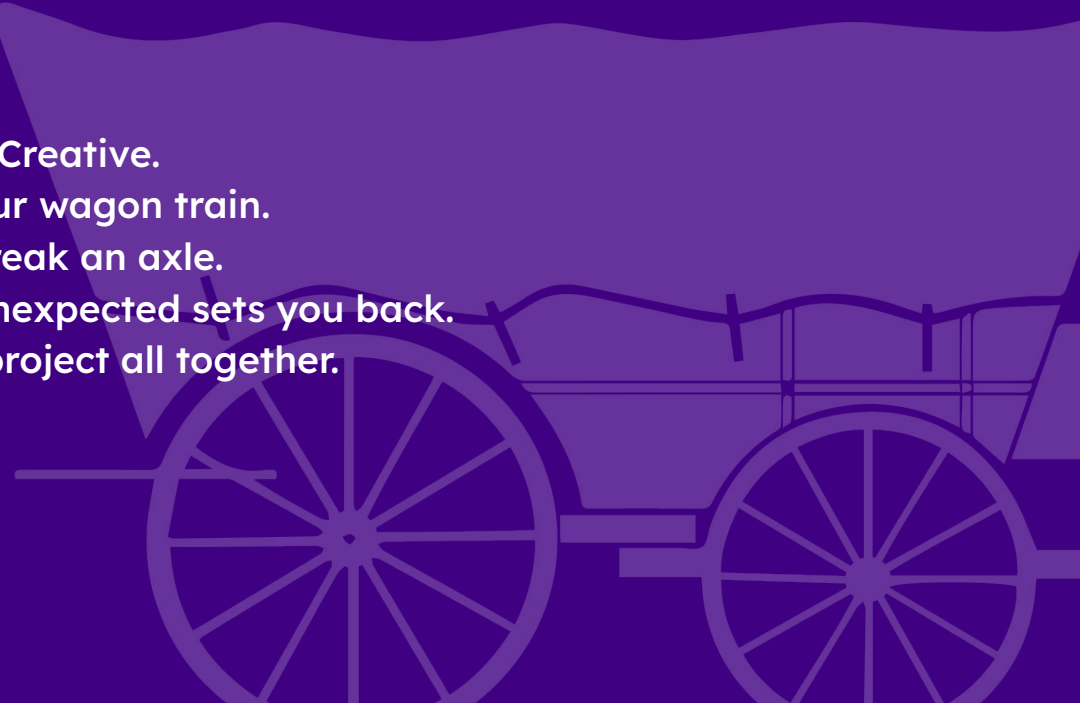
Tech. Product. Project Management. Creative.

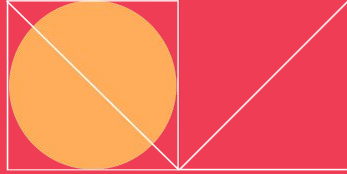
These people can be members of your wagon train.

You work together even when you break an axle.

Or they can be the snake bite that unexpected sets you back.

Or the dysentery that un-alives the project all together.





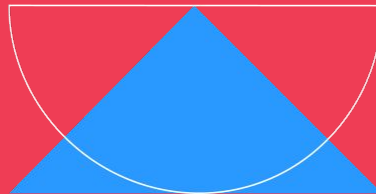
RFP Beats

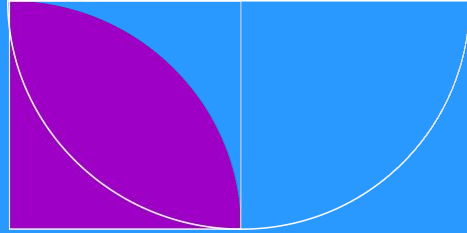
Bringing Everybody Along to Selection

It starts with building the RFP and getting alignment on the questions, the use cases and the mission.

If everybody agrees on the North Star, they should move towards it.

And if they don't, you have something to point them to to get them back on track.





Sharpening the Axe

To Cut Trees and Keep People In Line

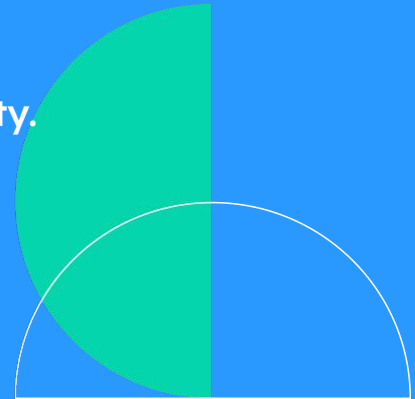
Your grindstone tools:

Be a curious mind (and learn to be a little bit technical)

Understand how things connect (and the implications of change)

Know your audience (and what matters to them)


This all creates your opportunity for alignment and future accountability.





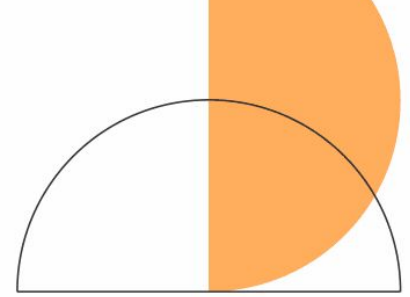
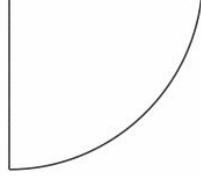
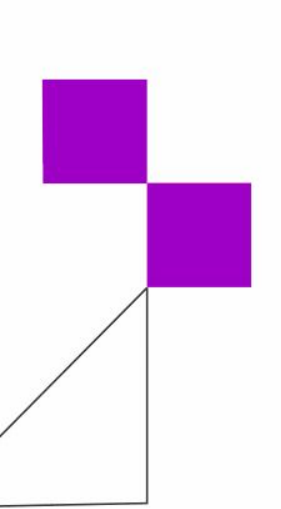
A Brief Word on Data

Where does it come from and why is it so big?
Don't wait for it to be done to start your plan + design
Set it so you can forget it (a lesson in field types)

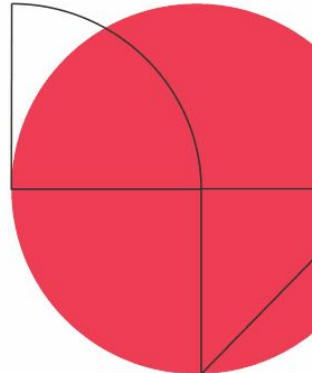
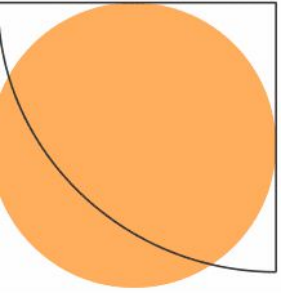


Really Tactical Email Items

- **Setting profile data you may need for a little while or in the future**
 - Don't be afraid to create profile fields you may hide in the future
 - Create profile fields with dates so you can reference them until a certain time in the future
- **Longitudinal testing record setup**
 - Create a journey that triggers for all new records
 - Use an A/B split to cut the group in half
 - Use two more to split those groups into 5 each
 - Assign profile values 0-9
 - Only allow an email to go through this journey 1 time
 - Value set for life
- **Think again about when you send your welcome email**
 - Re-evaluate timing vs. when a user may take an action on the site that would cause you to say something different
 - Make sure you don't accidentally send your welcome email to all of your existing users



Thank You





A Few Housekeeping Items

- Submit your session feedback in the mobile app by selecting this session and then click on **feedback** at the bottom. **Rate the session and click post your feedback!**
- All session recordings will be available at the end of September on iterable.com/activate
- Continue the conversation on social using **#Activate22**
- PSSST: some sessions will have QR codes to scan and earn points towards the raffle. **Keep your eyes peeled!**

