Connect & Collect

Propelling Customer Journeys with the Power of Automation

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StreetEasy (Zillow's NYC-specific app)

Currently a member of the Lifecycle Marketing and Operations team with Zillow Group's StreetEasy brand, Nate oversees the automation and upkeep of just shy of one billion messages annually to B2C and B2B audiences in the New York City real estate market.

StreetEasy

Street Cred

80MM+

Messages a month to B2C and B2B audiences

150+

Journeys and API triggered campaigns

99%

Use catalogs, data feeds or integrations

Agenda

01 Gated Content & Applications
02 Confirmations & Alerts
03 Listing Cards & Recommendations
04 Announcements & Reports
05 Blog Updates & Rollups

Third Party Platforms & Journey Webhooks

Gated Content & Applications

Requirements

Third Party Platforms & Journey Webhooks

1 Web Forms

I want a message triggered when a user fills out a form on our website (appointments, applications, etc.)

2 Gated Content

I want to deliver content that is not easily accessible by others to specific users.

3 Update Other Platforms

I want to update another platform, such as Salesforce, when an action is taken in a communication sent via Iterable.

4 Real-time Triggers

I want my communications to fire as soon as an action is taken.

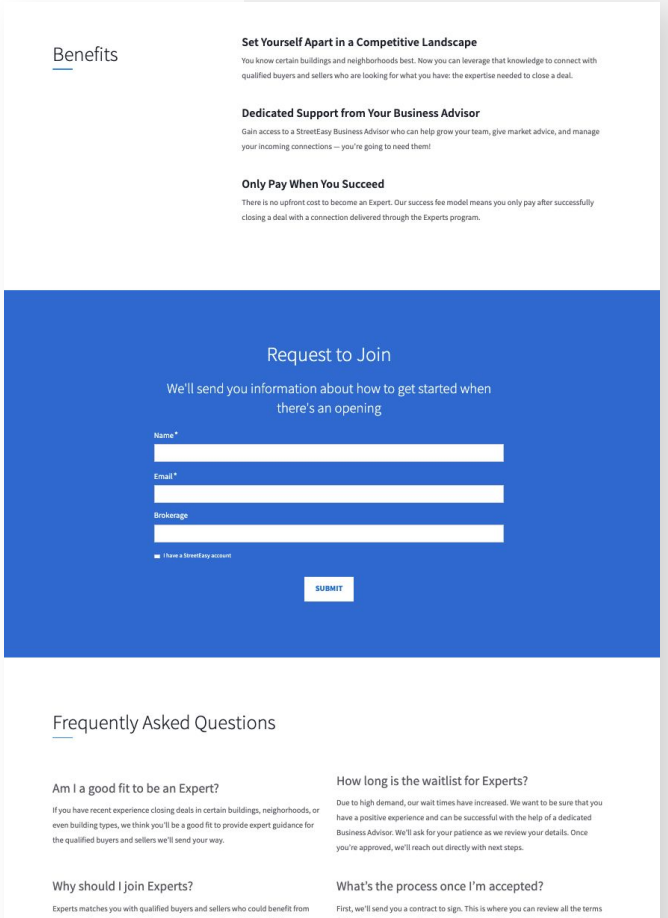
Third Party Platforms & Journey Webhooks

Gated Content & Applications

Example use cases:

- A consumer visits the website and wishes to speak to a concierge about selling their home. They fill out a form which triggers an email to schedule an appointment via Calendly.

- An agent visits the website and wishes to become a StreetEasy partner. They fill out a form which triggers a link to request a DocuSign contract.

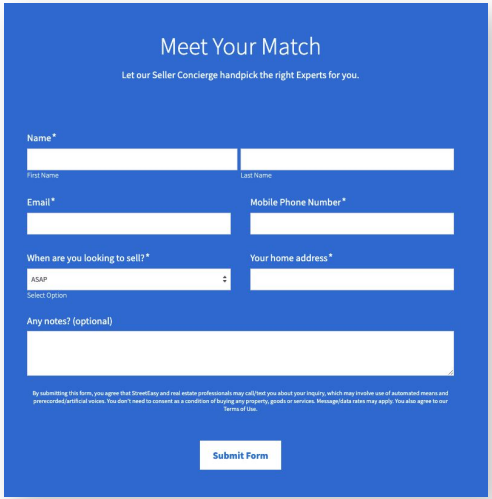


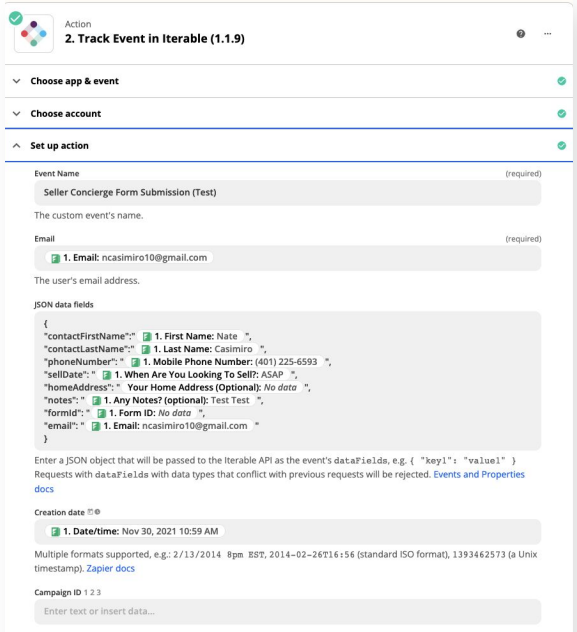
Engineering-free Custom Event

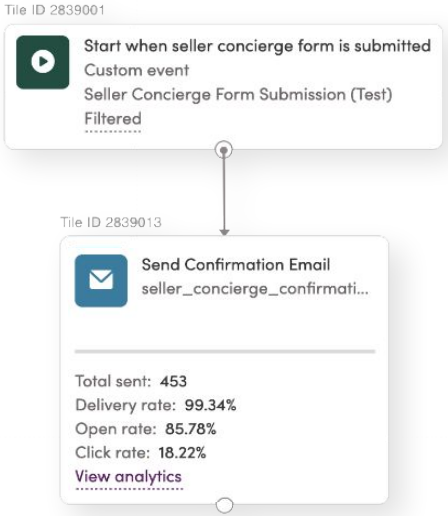
Formstack + Zapier + Iterable

Iterable's upcoming Web In-app functionality could potentially remove the need for third parties in this use case.

User Submits Formstack Form → Zapier Creates Event from Submission → Iterable Receives Event, Sends Email



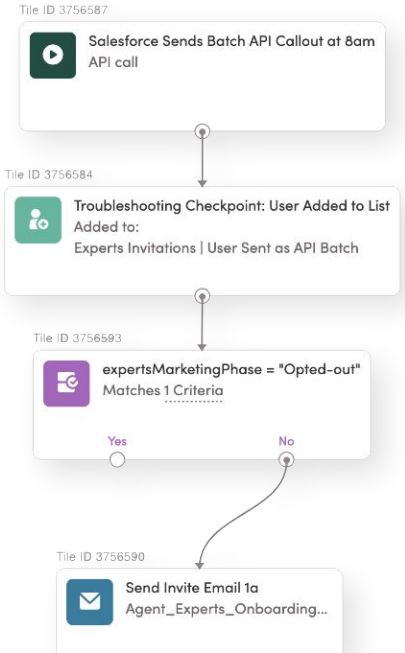




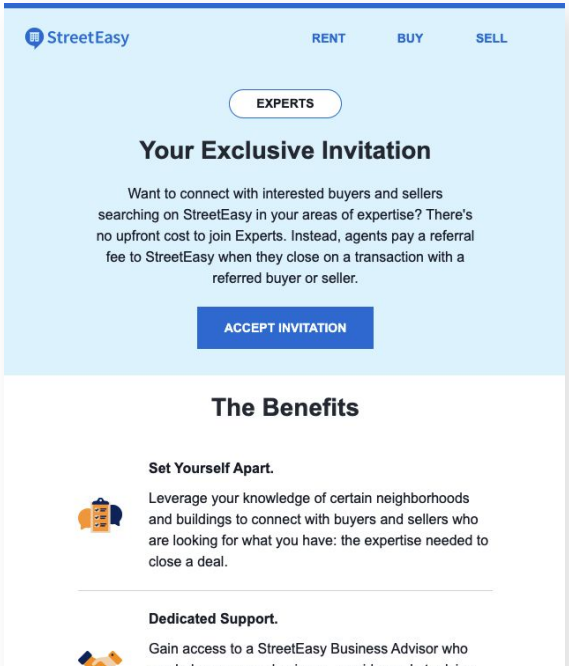
Salesforce Connection via Webhooks

Iterable + Salesforce

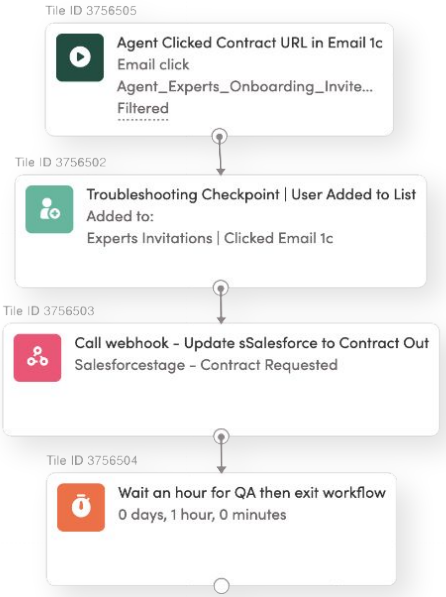
Salesforce Makes API Call to Iterable



User Clicks Email CTA



Iterable Updates Salesforce via Webhook



Things to Consider

Pros

- Some combinations, such as the Formstack/Zapier, can require literally zero engineering – really!
- Great for anything you would use a form for, such as websites, tradeshows, etc.
- Journeys to track clickthroughs and unsubscribes can trigger in real-time and use webhooks to update other platforms

Cons

- Zapier and other third parties have their own costs (but likely less than the cost of engineering hours)
- Zapier can be technical / understanding of basic JSON is a plus
- Iterable journeys can filter on quite a bit, but not everything will be able to fire in real-time; sometimes you will need manual checks built into your journey.

Takeaways

- Iterable can play nice with third party tools and platforms
- Slight learning curve with using third parties, but well worth the investment to be able to set up your own custom event triggers
- The ability to speak directly to some platforms (like Salesforce) and skip data lakes can prevent discrepancies from overlapping syncs or bad data hygiene.

Custom Events & Journeys

Confirmations & Alerts

Requirements

Custom Events & Journeys

1 Real-time Triggers

I want my communications to fire as soon as an action is taken.

2 Filter by Field

Once and event is triggered, I want to filter which users receive communications based on event or user profile data

3 Product Data

I want to populate data from my product within a communication.

4 Timelines & Schedules

I want to trigger a communication in real time but hold a send until specific days of the week or time of day

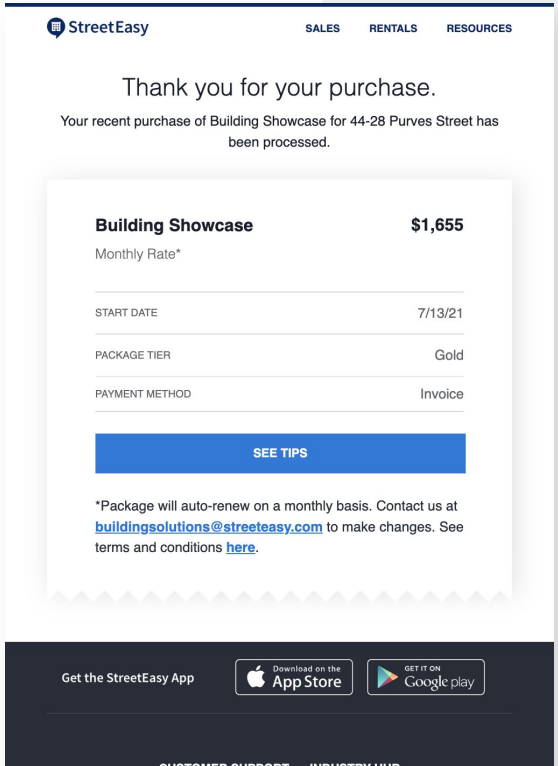
Custom Events & Journeys

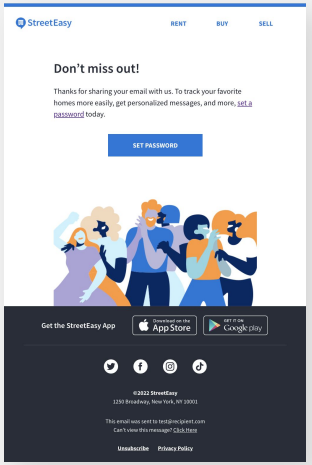
Confirmations & Alerts

Examples

- Sending a receipt when a feature is purchased.
- Sending an email to reset a user's password.
- Checking if an account was created with an anonymous email via services like iCloud Private Relay, then asking a user to verify their email.

The price point below actually populates via an additional Iterable feature called Collections, which would warrant its own presentation down the line.





Things to Consider

Pros

- Easy to understand; simply place the data needed in the custom event to trigger the message
- Great for 1:1 outcomes
- Set these custom events to trigger a Journey to add additional filtering and timelines, or set as a triggered-campaign to fire instantly with minimal server delay

Cons

- Without third party tools, these will most likely require engineering resources each time you build a custom event
- Hard to change after it's put into production and may force you to rename fields and update templates if revised
- Only one event can trigger and power a Journey, so you need to be highly proactive when building out events

Takeaways

- Custom events can be used extensively, but they are better when paired with additional Iterable features, which we will discuss in this next use case.

Catalogs, Collections & Snippets

Listings Cards & Recommendations

Requirements

Catalogs, Collections & Snippets

1 Dynamic Content

I want to populate specific property details based on a single key value using a minimal amount of code

2 Code Collections

I want to easily reproduce this result across a number of templates with minor adjustments

3 Minimize Engineering

I want to iterate versions of this content while minimizing the amount of engineering effort

4 Personalized Data

I want to display pieces of data and content within a message that is personal to a user

Catalogs, Collections & Snippets

Listings Cards & Recommendations

Examples

- Monthly reports on user consumption data or performance benchmarks
- Any communications that populates details for products, places, events, or services. In StreetEasy's case, listing cards with property details.

CONDO IN LOWER EAST SIDE

199 Chrystie Street #6

$5,995,000

3 Bed | 3.5 Bath

Listing by Casa Blanca Real Estate (60 Collister Street, New York, NY 10013-2083)

CONDO IN LOWER EAST SIDE

199 Chrystie Street #PH1

$18,350,000

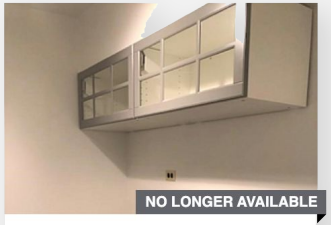
6 Bed | 6 Bath | 4610 ft²

Listing by Casa Blanca Real Estate (60 Collister Street, New York, NY 10013-2083)

COOP IN MIDTOWN

100 West 57th Street #12I

$139,000



COOP IN MIDTOWN

100 West 57th Street #12Q

$99,000

Listing Cards Snippet

Powered by Catalogs

```
{{#catalog "Listings" "rental
    -3918081" as |listingId|}}

{{{ snippet
    "bynd_listing_card_long_open_hou
    se_one" listing=this event
    ="open_house" }}}

{{/catalog}}
```

HOUSE IN JERSEY CITY

214 Grand Street #2

$2,495

UPCOMING OPEN HOUSE

1 Bed | 1 Bath

Listing by Core Nj

Key	image_full_url	addr_street	neighborhood	price	bedrooms	baths	url
rental-3918081	https://photos.zillowstatic.com/fp/b51f3839283ebc8ce940b30837a35bff-se_large_800_400.png	214 Grand Street	Jersey City	2495	1	1	https://streeteasy.com/rental/3918081

Things to Consider

Pros

- Once built out this, this can easily be scaled and customized to create countless dynamic communications
- Reduces the amount of data delivered via custom events or stored in the user profile
- Populate as much or as little information as you need for each catalog item
- Thoughtful snippet system can supplement limited email coding experience

Cons

- Requires moderate set-up and engineering resources as well as a regular system for syncing
- Mild learning curve involving writing and modifying handlebar, catalog and assign statements
- Updating a single item in the catalog manually in the event of a failed sync can be cumbersome
- Locating items within a catalog is also tedious

Takeaways

- While a marketing operations team will need engineering time and resources to stand up your catalog, consider this an investment that will allow you to operate more independently down the line
- One or two robust catalogs and a handful of snippets that utilize an array of positional parameters will equip you for a wide array of communication use cases

Catalogs + Google Sheets

Announcements & Reports

Requirements

Catalogs + Google Sheets

1 Self-service

I want copywriters or other team members to edit the copy of a campaign, at will, without me.

2 Safety First

I don’t want the copywriters to have the ability to change any code and break my template.

3 Time After Time

I want to reuse this process every week, month, etc.

4 Style Savant

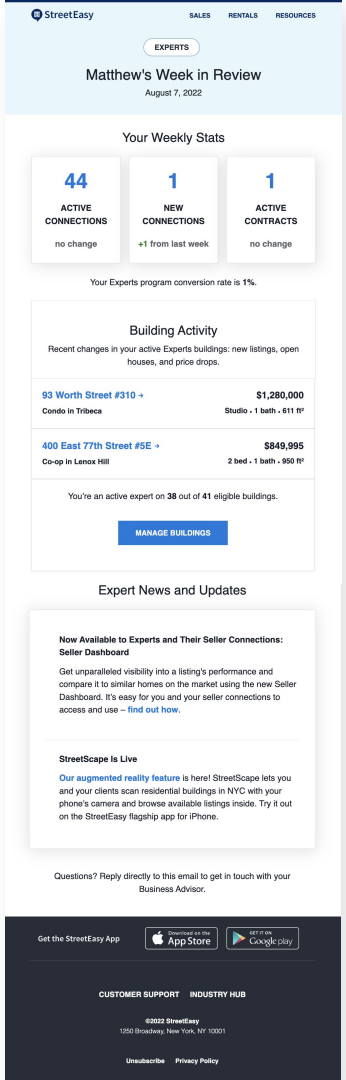
I want copywriters with fundamental HTML skills to be able to change colors, text styles, etc.

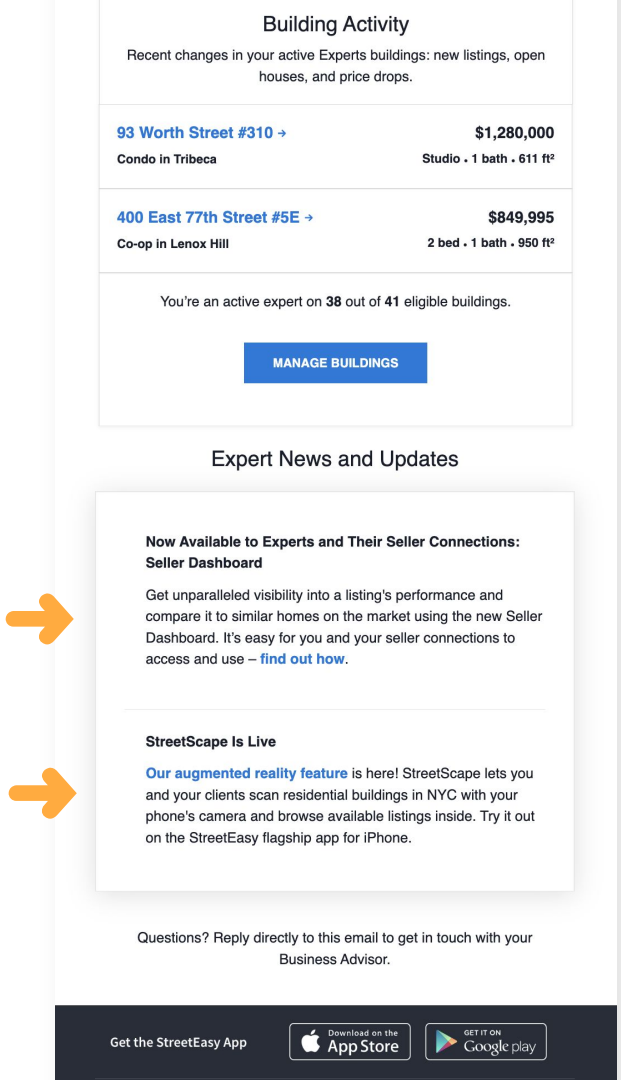
Catalogs + Google Sheets

Announcements & Reports

Examples

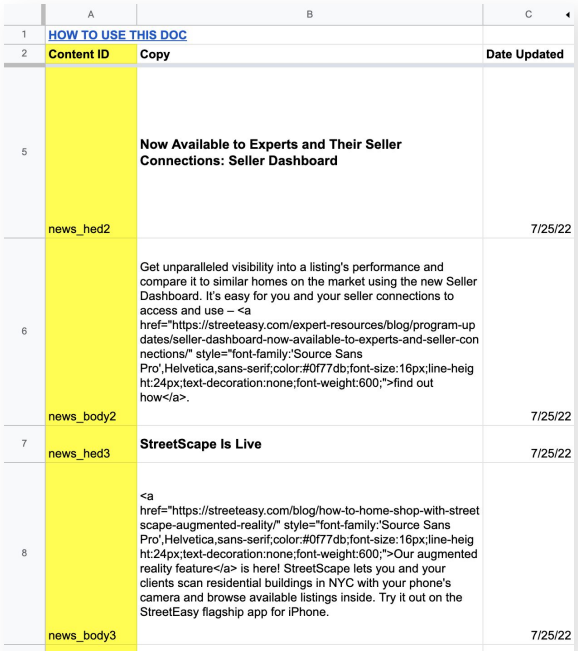
- A user sees product announcements at the bottom of a personalized email with engagement summaries and performance metrics.
- A traditional newsletter with every section populated by a copywriter.



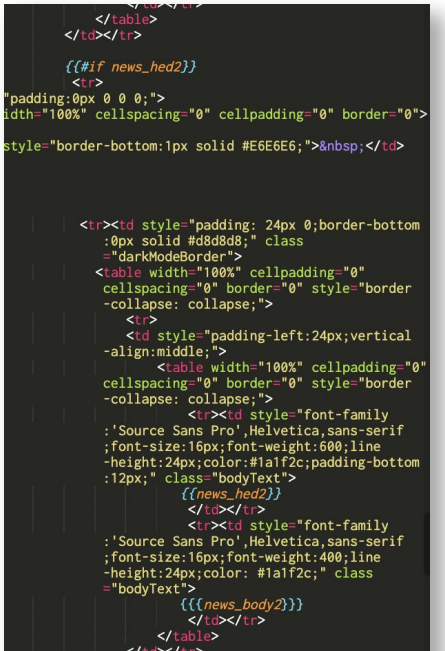


Copywriter Self-service

Copywriter populates Google Sheet → The Catalog syncs each week → The campaign pulls Catalog data at send-time



	A	B	C
1	HOW TO USE THIS DOC		
2	**Content ID**	**Copy**	**Date Updated**
5	news_hed2	**Now Available to Experts and Their Seller Connections: Seller Dashboard**	7/25/22
6	news_body2	Get unparalleled visibility into a listing's performance and compare it to similar homes on the market using the new Seller Dashboard. It's easy for you and your seller connections to access and use – find out how.	7/25/22
7	news_hed3	**StreetScape Is Live**	7/25/22
8	news_body3	Our augmented reality feature is here! StreetScape lets you and your clients scan residential buildings in NYC with your phone's camera and browse available listings inside. Try it out on the StreetEasy flagship app for iPhone.	7/25/22



```
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            -height:24px;color:#1a1f2c;padding-bottom
            :12px;" class="bodyText">
                      {{news_hed2}}
                    </td></tr>
                    <tr><td style="font-family
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            ;font-size:16px;font-weight:400;line
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                      {{{news_body2}}}
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                  </table>
```
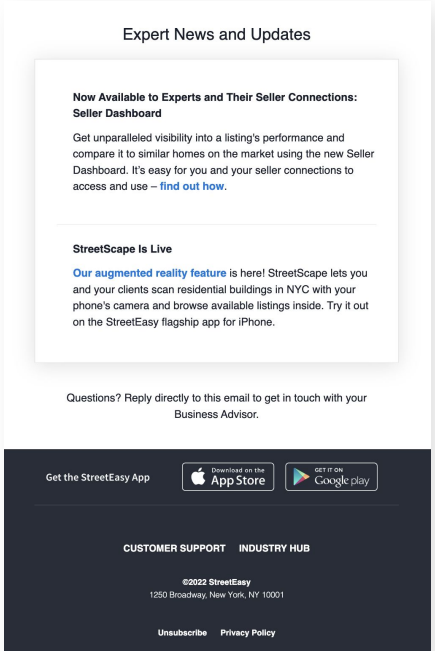



Things to Consider

Pros

- Possibly easy to stand up if your engineer is familiar with the process
- You don’t have to make 6,478 updates because they decided they like an ampersand instead of the word “and”
- Great way to supplement personalized/dynamic content with intentional, static calls to action

Cons

- Copywriters will not be able to view an HTML email proof until after each sync occurs. Updating after the most recent sync could result in excessive delays in the copywriter’s process
- If the need an update before the next sync, updating a catalog manually can be a chore.

Takeaways

- This is a bit elaborate for a newsletter, however it’s a great way to add on to personalized content populated by Catalogs
- Removing yourself from these straightforward processes free up time for you to work on more data driven communications. Or take a nap

Data Feeds

Blog Updates & Rollups

Requirements

Data Feeds

1 Blog Content

I want to populate pull content I've created in another platform such as WordPress.

2 One and Done

My copywriters don't want to rewrite content for email that they have already summarized on web.

3 Time After Time

I want to reuse this process every week, month, etc.

2 Safety First

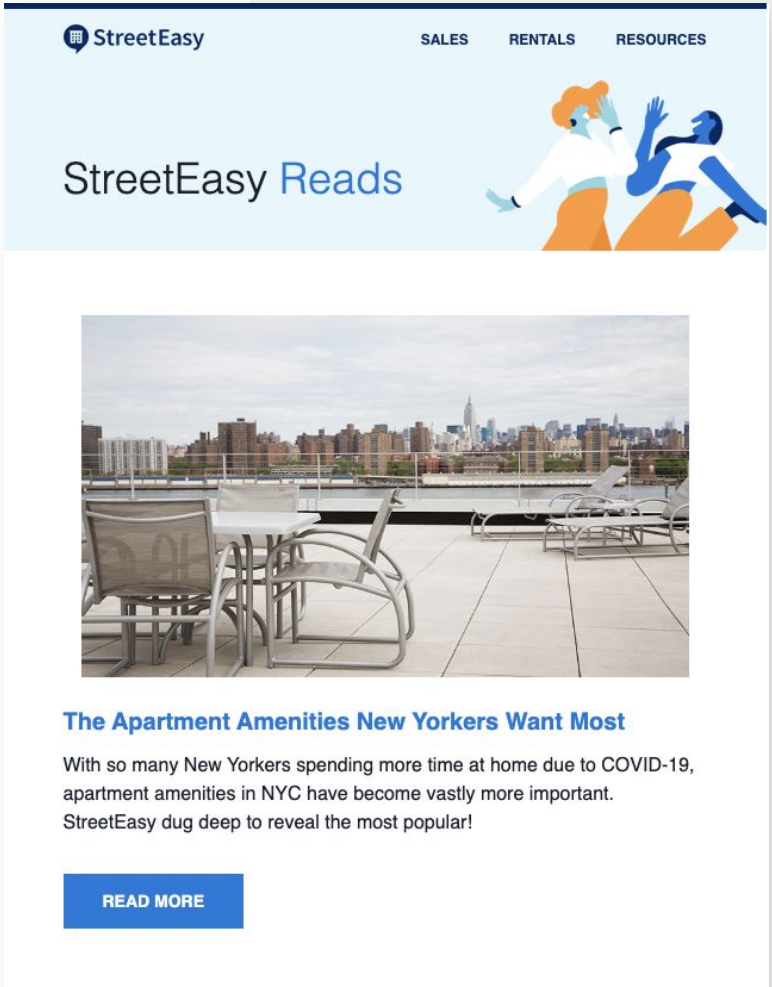
I don't want the copywriters to have the ability to change any code and break my template.

Data Feeds

Blog Updates & Rollups

Examples

- Each week a rollup campaign should go out to consumers with the three newest StreetEasy blog posts.
- A campaign goes out each day an episode of your business podcast goes live.



Things to Consider

Pros

- Fairly specific solution for querying external web services such as XML, RSS and Atom, making it ideal to pull blog, podcast and a variety of other media
- Can be populated in real-time versus around scheduled Catalog syncs

Cons

- You may not use external web services for rollup-related content
- You will want to read up on string parameters to unlock the full benefits

Takeaways

- This is a pretty neat feature and can be combined with custom events and Catalogs, but it may be hit or miss if it works for your existing stack and comes with some unique parameters that may or may not be worth your time

Demo

Scan the QR code to have a copy of the deck emailed to your inbox.

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!**