



# **Personalized CRM Strategies**

Vahe Baghdasaryan, CRM Expert

About Me

# Vahe Baghdasaryan

- Sr Growth Marketing Manager  
@ CoinStats
- App Growth Consultant
- Founder



**In CRM, personalization  
has the greatest potential  
to move the needle.**



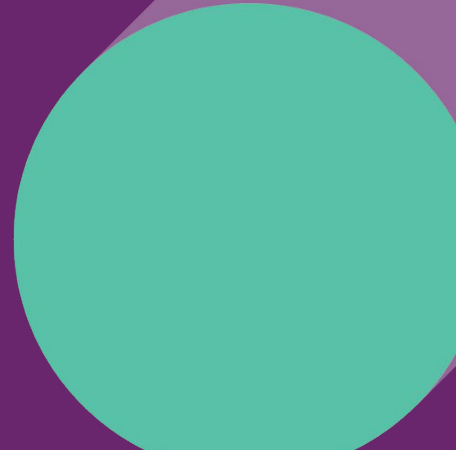


# How Most CRM Personalization Strategies Work

- Audience segmentation / cohorts
- Personalization based on customer inputs
- Location
- Device / OS

**Is this a wrong  
approach?**

**ABSOLUTELY NOT!**

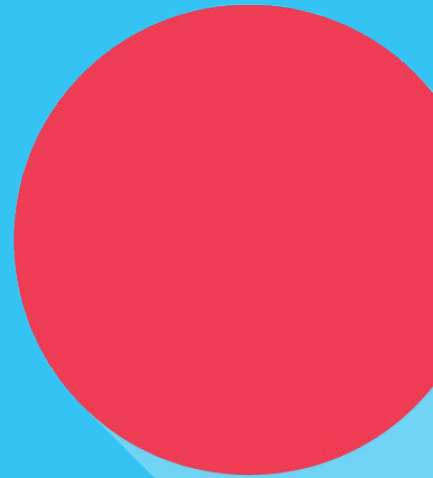


**Is there a better  
approach?**

**ABSOLUTELY YES!**



# Holistic Approach to CRM Personalization



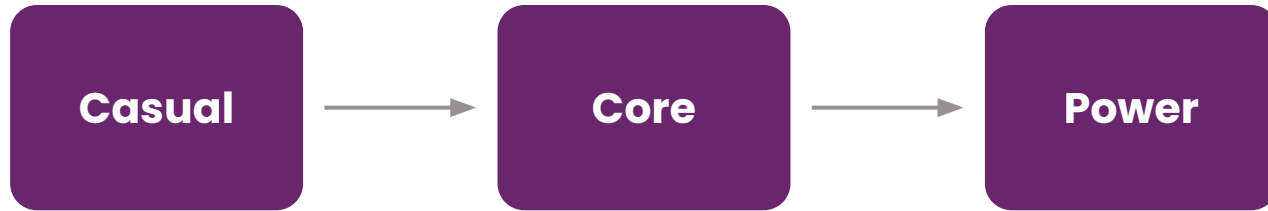


# How Does the Holistic Approach Differ?

- Takes into account user Engagement States
- Divides users into Engagement Cohorts
- Accounts for acquisition channels, locations, and other user characteristics



# Engagement States (non-exclusive)



# How to define engagement states for personalization



# Defining Engagement States by Features

Features	Correlation Score with Long Term Retention
Portfolio Tracking	0.7
Price Tracking	0.8
News	0.5
Price Alerts	0.8
Trading	0.6
NFT Tracking	0.4
Analytics	0.5



# Defining Engagement States by # Features people use

# Features	Correlation Score with Long Term Retention
1	0.3
2	0.5
3	0.6
4	0.7
5	0.85
6	0.95
7	0.97



# The Complete Picture of Engagement States

## Casual

### 1-2 Features

Coin Analytics + News

## Core

### 3-4 Features

Trading + Price Alerts +  
Portfolio Tracking

## Power

### 5-6 Features

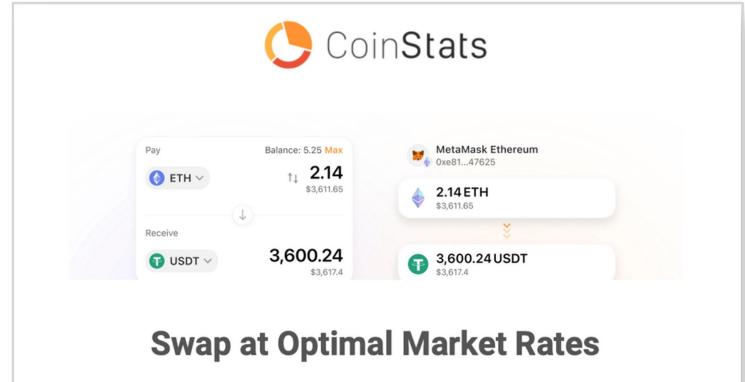
Trading + Price Alerts +  
Portfolio Tracking +  
Price Tracking

# Mismatching CRM with Engagement States



## Casual Users

- ✗ No Connected Portfolio
- ✗ Have no wallets
- ✗ Very low engagement



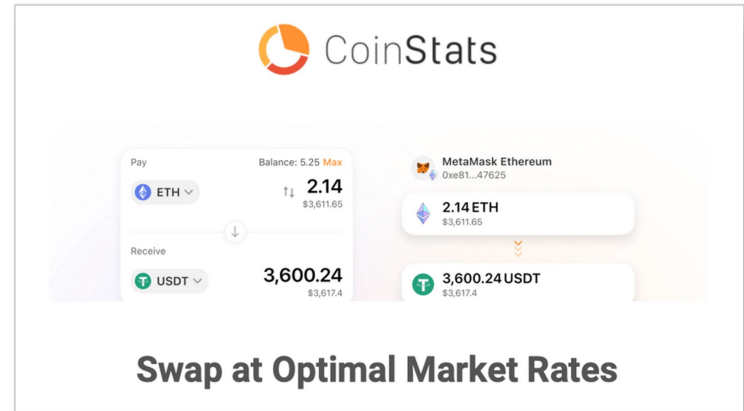
*Example email nudging users to swap*

# Mismatching CRM with Engagement States



**Core**

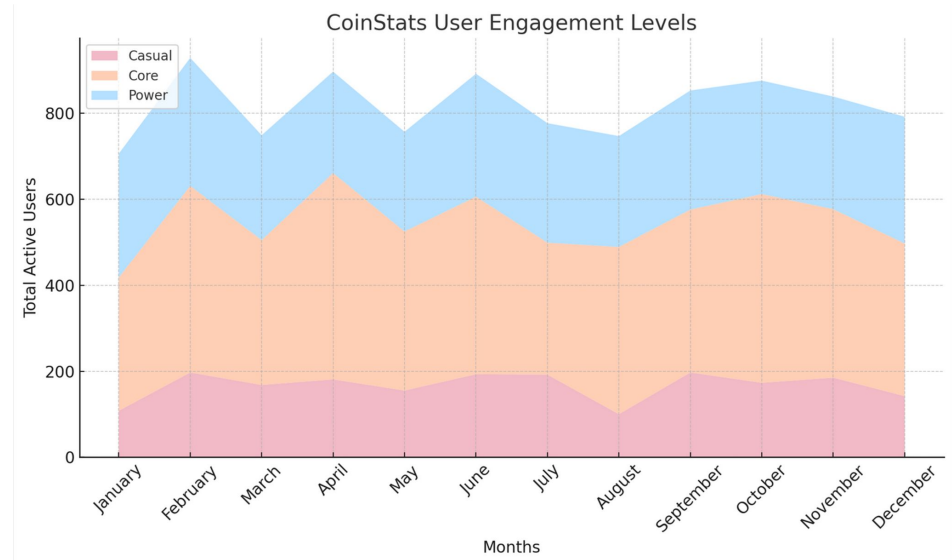
- ✓ 2-3 Connected Portfolio
- ✓ Weekly trader
- ✓ Uses the app 3/7 days per week



*Example email nudging users to swap*

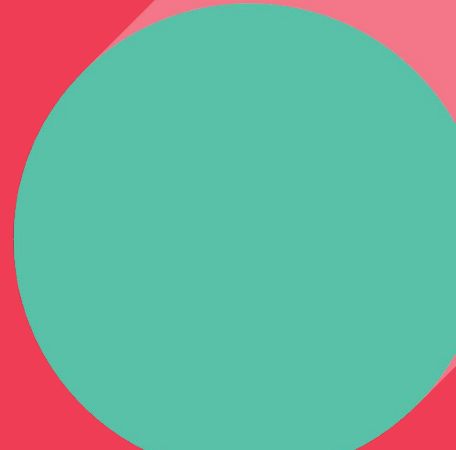
**What influence does CRM have on this chart?**

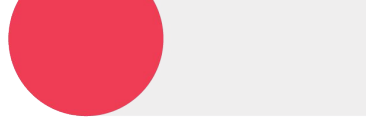
## Engagement State Levels Over Time





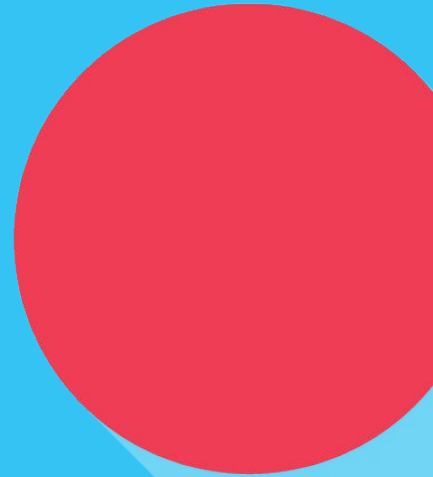
**Does your personalized  
CRM strategy answer  
these questions?**






- Did we clearly define our engagement states?
- Is there a mismatch between our CRM strategy and user attributes?

# Building a personalized CRM strategy based on user attributes



# Adaptive Personalized Strategies Based on User Attributes

CoinStats






**Good morning, mashinyan!**  
Here's your weekly portfolio update.


Check out this week's performance of your coins, NFTs, and portfolio overall.

Portfolio Value	Portfolio Change
<b>\$44,728.54</b>	<b>\$4,341.26</b> ▲9.26%

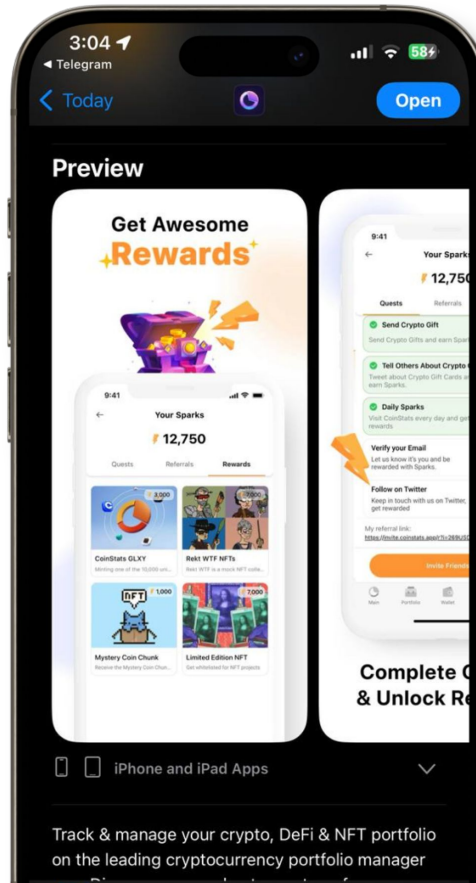
Top Coins

Asset	24 Hours P/L	Price	Total Amount
 <b>Bitcoin</b> BTC	<b>\$704.11</b> ▲3.41%	\$21,341.77	\$22,341.77
 <b>Ethereum</b> ETH	<b>\$2,400.76</b> ▲15.41%	\$1,715.76	\$10,627.11
 <b>Tether</b> USDT	<b>\$0.699021</b> ▼0.14%	\$1	\$500

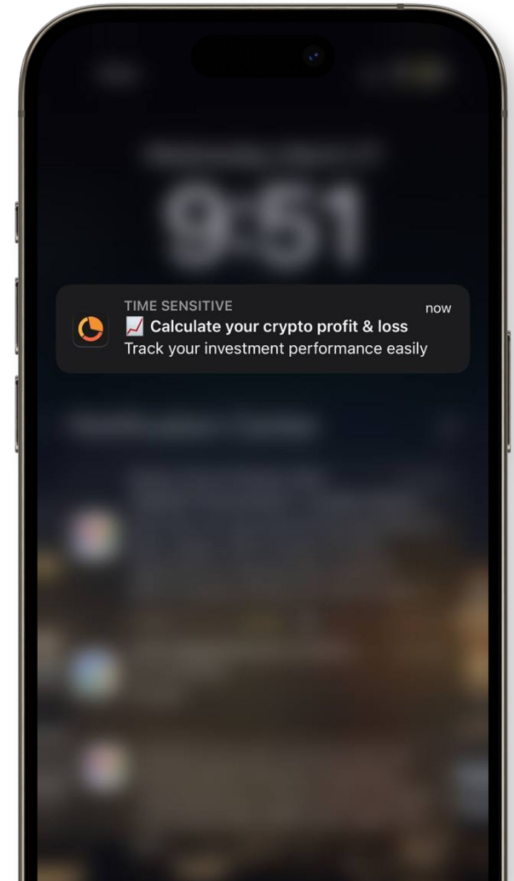
[See More](#)

Sparks	Gain/Loss	Transactions
 <b>32</b>	<b>-\$127</b>	<b>⇌ 128</b>

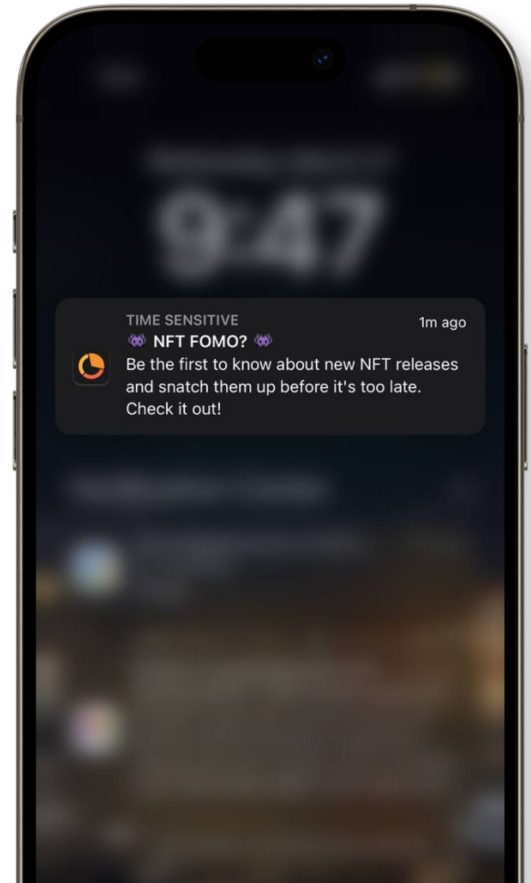
# Adaptive Personalized Strategies Based on Acquisition Channels



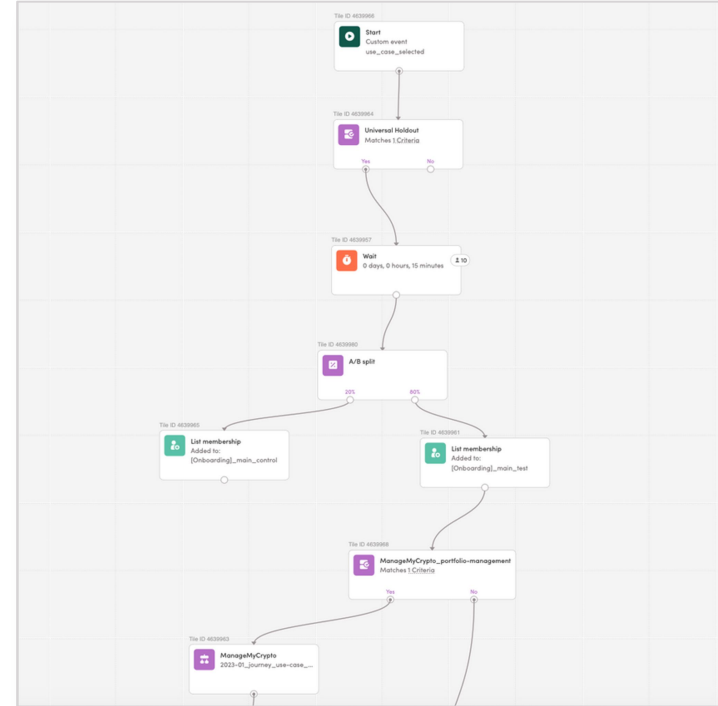
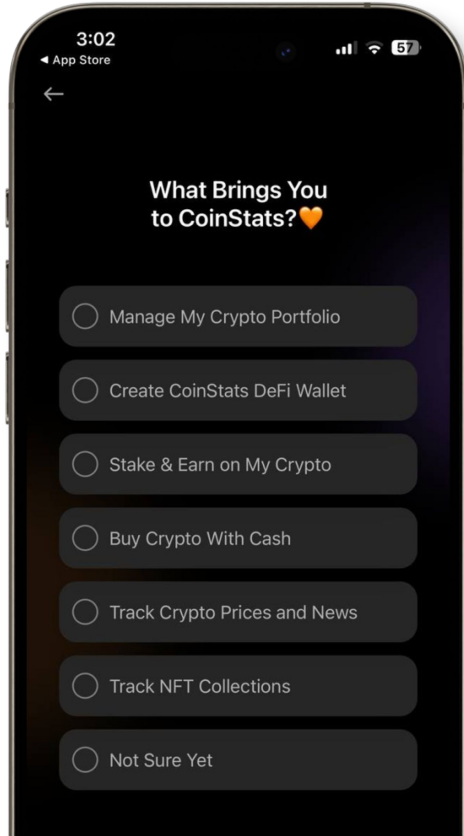
Track & manage your crypto, DeFi & NFT portfolio on the leading cryptocurrency portfolio manager



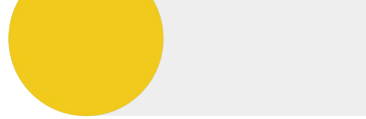
# Adaptive Personalized Strategies Based on Acquisition Channels



# Adaptive Personalized Strategies Based on Onboarding Inputs



*Journey snapshot from Iterable*



# To sum up

- Personalization is not just about doing user segmentations and cohorts
- CRM strategy should be aligned with user engagement states
- Personalization strategy should consider user attributes like acquisition channels, intents, and use cases



# THANK YOU



**@bvahe**



**@vahebagdasar**





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