

The background features a light gray network of interconnected nodes and lines. Overlaid on this are several large, semi-transparent geometric shapes: a yellow circle at the top, a red circle on the left, and a blue circle at the bottom right. A solid blue horizontal bar is positioned across the upper middle section.

Advanced Workshop

Getting the Most Out of Iterable's AI Suite

Deep dive into Iterable's Predictive Goals



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Agenda

01 Housekeeping, Learning Outcomes

02 AI Landscape

03 Iterable AI Features Spotlight:

- Copy Assist
- Channel Optimization
- Frequency Optimization

04 Predictive Goals Deep Dive:

- Set-up and identifying goals
- Interpreting the output
- Use cases and testing

05 Learning Recap, Next Steps

Today's Learning Objectives

Copy Assist, Channel, Frequency Optimization

How marketers are thinking about and using these features.

Predictive Goals

Planning Predictive Goals aligned to your outcomes.

How to **interpret** and think about Predictive Goals outputs.

How to **use** Predictive Goals in Campaigns and Templates.

How to **test** and assess performance/lift from Predictive Goals.



Today's Goals:

- **Discuss and learn** how you/others are using AI to support go-to-market strategy.
- Identify **new ways** in which Iterable AI could help support your outcomes and programs.
- Identify how to **set-up, manage, and test** Predictive Goals in a test and learn/ongoing basis.

Housekeeping

Location Logistics

Bathroom break, snacks, drinks,
outlets, get up and stretch...

...take the time you need to for the
things you need!



Housekeeping

Session Info

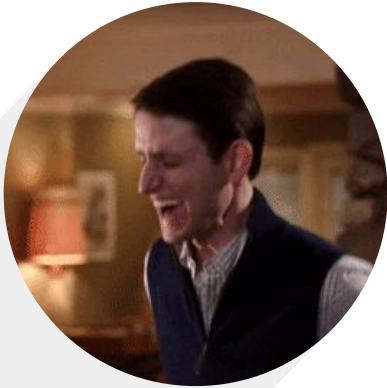
Event materials will be available at the end of the session

We will have a portion of **time dedicated for Q&A** but feel free to ask questions for the Iterable folks walking around

We want your feedback! Please be sure to fill out the post event survey in the follow-up email



Housekeeping



Wanting more AI?

If you're interested in more AI information and/or a **one-on-one session related to your AI wants/needs**, please provide your contact information on the sheet at your table.

- Name
- Company
- Email and/or SMS number (or WhatsApp)
- Preferential date/time to meet at Activate (or future date)

Slido for questions

Slido.com / code: 2260752





What are you most excited to learn about today?

① Click **Present with Slido** or install our [Chrome extension](#) to activate this poll while presenting.

AI Landscape





91%

**Marketing leaders are already using AI
in their jobs today**

Source: Iterable

How to Think About AI

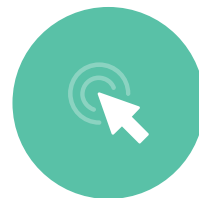
Powered by data, AI is fundamentally a **set of insight tools** here to **solve specific tasks and problems**. Here is how we think about AI at Iterable:



AI is powered by
historical data.



AI speeds up
decision making.



The time to act
is now.

Iterable AI Features



Expanded AI Suite

Generative

Optimization

Audience Insights

AI Feature	Standard	Premium
Next Best Action (New)		✓
Copy Assist	✓	✓
Frequency Optimization (New)		✓
Channel Optimization	✓	✓
Send Time Optimization	✓	✓
Predictive Goals with Explainable AI		✓
Brand Affinity with Explainable AI	✓	✓



How marketers (you) are thinking about and using:



Copy Assist



**Channel
Optimization**



**Frequency
Optimization**

Standard

Copy Assist

What it does: Overcome writer's block and iterate over different messages quickly based on your existing copy.

Provides new copy suggestions based on marketer created content.

Pre-reqs:

- 10 characters minimum
- Available for Email, SMS, and Mobile Push
- Subject line, preheader, body (SMS/Push)
- *No data requirements, can use immediately*
- *Limited to approved industries*

VALUE DRIVERS:



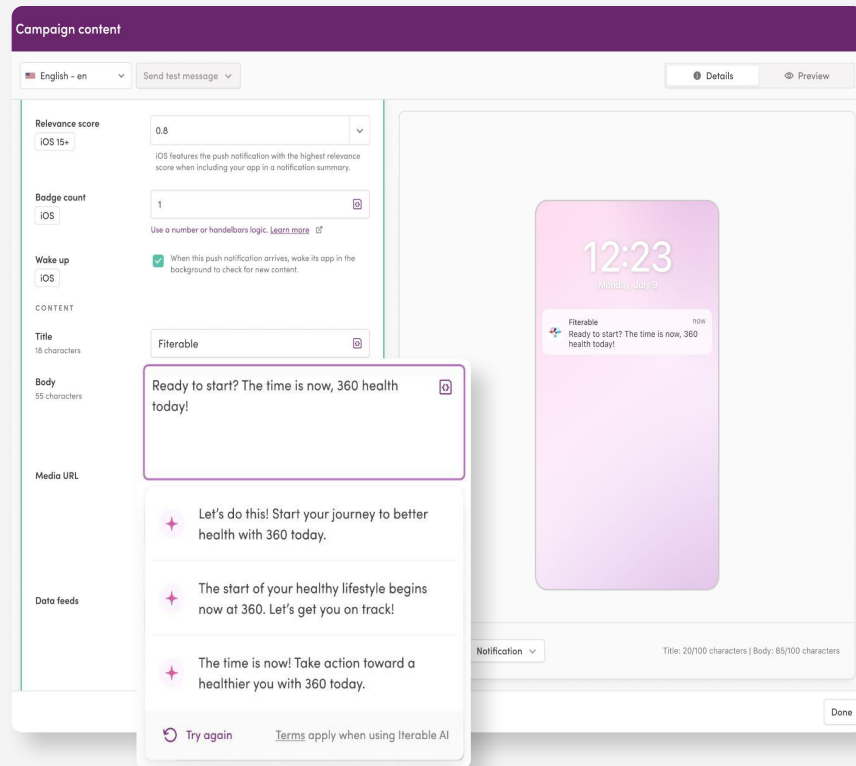
Easy to access and implement



Increases volume of copy options



Saves time, iterate quickly



Located in Setup flows for Campaigns, Templates, and Experiments

Standard

How Marketers Are Using **Copy Assist**

Use to generate different subject line, pre-header, and body copy options and then **test this version against your champion/control.**

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Use to generate different subject line, pre-header, and body copy options and then **test this version against your champion/control.**

Provide copy options as a starting point/input to your copy writer or content team for **campaign inspiration.**

How Marketers Are Using **Copy Assist**

Use to generate different subject line, pre-header, and body copy options and then **test this version against your champion/control**.

Provide copy options as a starting point/input to your copy writer or content team for **campaign inspiration**.

Use to **generate channel copy options/inspiration** when translating from one campaign (channel) to another (e.g. use email copy for sms campaign).



How are you thinking about and/or using **Copy Assist** with your programs?

① Click **Present with Slido** or install our [Chrome extension](#) to activate this poll while presenting.

Standard

Channel Optimization

What it does: Leverages historical data to automatically determine and send messages on the right channel, based on a users' likelihood to engage with a message.

Pre-reqs:

- Allows for optimization across Email, Push, and SMS (must use 2 of these channels)
- Available for triggered, marketing messages
- *Need ~3 months of historical data to be most effective, can be enabled now*

VALUE DRIVERS:



Increased user engagement



Drive urgency/action for time sensitive alerts

The screenshot displays the Journey Builder interface for a "Holiday-themed 'Thank You'" journey. A "Channel Optimization" tile is shown in a workflow, triggered by a "Start when" event with the trigger type "Secondary value", filtered. The configuration panel for the "Channel Optimization" tile is open, showing the following settings:

- Boost engagement with the right channel:** Channel Optimization looks at historical data to determine your users' preferred channels for marketing messages.
- Send channels:** Choose at least two channels. Email and Push are selected (checked), while SMS is not.
- FALLBACK OPTIONS:** Choose send preference when there's inconclusive data. Email is selected as the first option, and Push is selected as the second option.

Located in Studio (Journey Builder) as a send tile option

How Marketers Are Using **Channel Optimization**

Incorporating Channel Optimization tile in all applicable messages/journeys to automatically select the channel a user is most likely to engage with (minus test/control campaigns).

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Experiment/test campaigns that uses Channel Optimization vs. those that don't (control).

How Marketers Are Using **Channel Optimization**

Incorporating Channel Optimization tile in all applicable messages/journeys to automatically select the channel a user is most likely to engage with (minus test/control campaigns).

Experiment/test campaigns that uses Channel Optimization vs. those that don't (control).

Use insights gained from Channel Optimized journeys to get a sense of **most relevant channels** based on campaign/message.

slido



How are you thinking about/using Channel Optimization with your programs?

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Premium

Private Beta

Frequency Optimization

What it does: Identifies the ideal frequency limit for each user, per channel. Marketers can provide their preferred capping range, Iterable AI identifies the optimal limit.

Frequency management includes both Frequency Capping and Frequency Optimization.

Prioritize a message by ignoring the frequency cap for a campaign, a message type, or a journey.

VALUE DRIVERS:



Expanded personalization



Optimal touchpoints
(avoids over messaging)



Relevant customer experiences

Frequency Management

Cap the number of marketing messages your users receive. [Learn more](#)

✉ Email

Set preference ▾

Message maximum

Send no more than Email messages per per user.

💬 SMS

Optimize 🔧 ▾

Your range is set at **2** to **5** messages per **week**.

🔄 Reset

Audience distribution by cap [?]

Refreshes weekly • Last updated on 12/12/2022



📱 Push

No cap ▾

SAVE PROJECT SETTINGS

Frequency Optimization details will be surfaced in the User Profile field.

Premium

Private Beta

How Marketers Are Using **Frequency Optimization**

Avoid over-messaging;
use to **reduce
complaints and
unsubscribes.**

How Marketers Are Using **Frequency Optimization**

Avoid over-messaging;
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Use to **understand the
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action. Ensure
journeys/campaigns
and timing are in line
with this optimal
frequency.

How Marketers Are Using **Frequency Optimization**

Avoid over-messaging;
use to **reduce complaints and unsubscribes.**

Use to **understand the 'sweet spot' in terms of messaging frequency,** driving users to take action. Ensure journeys/campaigns and timing are in line with this optimal frequency.

Use to understand **frequency variances between channels** to identify channel threshold and how that impacts journeys/campaigns.

slido



How are you thinking about/using Frequency Optimization with your programs?

① Click **Present with Slido** or install our [Chrome extension](#) to activate this poll while presenting.

Takeaway:



Copy Assist



Channel
Optimization



Frequency
Optimization

AI tools are stronger together. Use AI tools together for a powerful marketing strategy and plan (e.g. **right message** with copy assist, brand affinity, and predictive goals / **at the right time** with send time optimization and frequency optimization / **in the right context** with channel optimization).

10 Minute Break



Deep Dive: Predictive Goals



Premium

Predictive Goals

What it does: Utilizes valuable, first-party data to identify and predict each customer's likelihood to achieve a specific goal.

Build audiences based on their likelihood to convert on your goals.

Influence future behavior and drive conversions by tailoring your marketing.

VALUE DRIVERS:



Outcomes driven by conversion and action



Personalization to influence future behavior



Optimize consumer lifecycles

The screenshot displays the Iterable Predictive Goals configuration page for a goal named "Subscription renewal". The interface includes a "Goal criteria" section with a search bar for contact properties and a list of available properties: Age (Long), Email address (String), First name (String), Last name (String), Subscriber (Boolean), and Total purchases (Long). The "Have property" section is set to "subscription" with a value of "paid". The "in a given" section is set to "1 month" period. The "Prediction" section shows a graph of Probability vs. Percentile, with a vertical line at the 95th percentile. The graph indicates that 155,303 contacts were selected, which are 6.2x more likely to convert than the average, resulting in approximately 13K conversions predicted. A "View selection in segmentation" button is visible at the bottom right of the graph.

Predictive Goals details will be surfaced in the User Profile field and within Messaging Insights

Setting up Predictive Goals





Predictive Goals Scenarios:

1 Subscription

Consumers pay on a recurring basis for access to a product/service. Customers renew their subscription after a period of time (or transition from free to paid).

Examples include: Amazon Prime, Netflix, Prose, IPSY.

2 Non-Monetary

Driving consumers to take action before the actual purchase occurs. Activities could include: driving users to sign-up (create account), completing a form (lead submission), requesting a tour, and more.

Examples include: Cars.com, NerdWallet, Redfin.

3 E-Commerce

Consumers that purchase something online (driving a purchase/revenue-based action).

Examples include: Joybird, Vera Bradley, Nuts.com, Warby Parker.



Brainstorm and Small Group Discussion (8 minutes)

Select a scenario and brainstorm different predictive goals aligned to driving consumer action.



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Larger Group Discussion (8 minutes)

Talk through predictive goals for three scenarios.
Discuss data inputs (events) relevant to goals and actions you want to drive consumers to take.



Takeaways on setting up Predictive Goals:

- **Predictive Goals to align with outcomes and actions** you are driving users to take.
- Think about data required to power the specific Predictive Goal in additional to **data to support actions around the goal** (e.g. driving a purchase, think about actions leading up to the purchase like adding products to a cart/check-out, creating an account, adding a credit card, and more).

Interpreting Predictive Goals





Demo (10 minutes)

Iterable Demo Predictive Goals output and walk through of how to interpret (scores and percentiles).

Demo



Takeaways on Interpreting Predictive Goals:

- Predictive Goals will populate **12-24 hours after creation** (assuming data schema/historical data needs have been met).
- Play around with the **top percentage used** to adjust for segmentation filters (drop off) and addressable audience size.
- Predictive goals is scored against all users (entire user base). **Additional segmentation should be considered** to segment out anyone not aligned to the goal's action.

Using Predictive Goals



How Marketers (you) are Using Predictive Goals



**Campaigns,
Segmentation**



**Template
Personalization**



Testing

Predictive Goals in Campaigns, Segmentation

1 Top % of Users

High propensity

Send these high propensity users **highly targeted and personalized communication** with the end goal of taking action.

Consider **not including a promo or incentive** for these users, as they are most likely to take action without an additional motivator.

2 Middle % of Users

On the fence

Middle ~60% are neutral users, they may or may not take action.
Consider testing different types of messaging and/or incentives to see what works best.

3 Bottom % of Users

Low propensity

Bottom X% are your least likely of your users to take action.

Consider:

- Testing something drastic in messaging/offers
- Suppressing these users from marketing communications
- Minimum frequency for these users
- Testing other channels

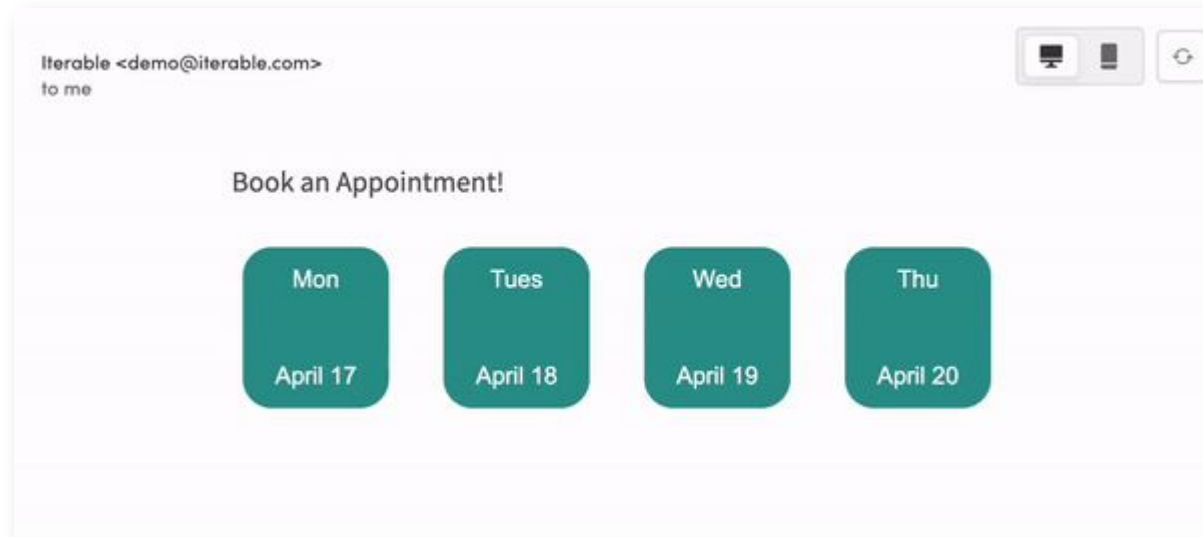


Predictive Goals in Template Personalization

- Predictive Goals are saved as user profile data, ability to **use inside any template.**
- Create **dynamic campaigns based on propensity score**, personalize and dynamically serving content (“If premium propensity greater than .8, display this section, if less than .8, display something else...”)

Example:

```
1 {  
2   "apptPercentile": 0.9  
3 }
```



Predictive Goals in Testing

- Consider **testing Predictive Goals audience against a non-predictive audience** (created in Segmentation) to assess audience size variance and gauge results/lift for predictive audience vs. non predictive (run A/B test for this).
- Assess **statistical significance** based on addressable audience size for testing confidence.
- **Track users as they move through the lifecycle** for illustrative examples of how predictive goals can pull users from awareness to conversion and retain in a loyalty state (track and test across journey path).

Testing example: Redfin

Goal: **converting inactive users** to active buyers and sellers

Testing set-up

Predictive Goals identified Inactive users.

Holdout group created (sending emails to 50% on buyer side, 10% on seller side).

Test group: conversion-oriented emails (book consultation, assess home's value).

Testing example: Redfin

Goal: **converting inactive users** to active buyers and sellers

Testing set-up

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Holdout group created (sending emails to 50% on buyer side, 10% on seller side).

Test group: conversion-oriented emails (book consultation, assess home's value).

Results

72% lift in converting inactive sellers to active state (additional **9% lift** in conversion after the seller emails).

15% lift in converting inactive buyers to an active state.

Directionally **positive lift** in seller consultations and tours booked.



Discuss:

How are you thinking and/or **actively using Predictive Goals** within your programs (testing)?



Takeaways on Using Predictive Goals:

- Predictive Goals provide a **campaign strategy filter** for high, on the fence, and low propensity users for messaging and action inputs.
- Predictive Goals used in templates to serve **dynamic content** based on how to best action a user.
- Identify and outline a **testing plan** to gauge performance/lift from Predictive Goals audiences.

Learning Objectives



Copy Assist, Channel, Frequency Optimization

How marketers are thinking about and using these features.

Predictive Goals

Planning Predictive Goals aligned to your outcomes.



How to **interpret** and think about Predictive Goals outputs.

How to **use** Predictive Goals in Campaigns and Templates.

How to **test** and assess performance/lift from Predictive Goals.



One Last Thing...





Suggested Action Plan *(not using AI features/Predictive Goals yet)*

- **Flag to your CSM** (if you haven't already) that you're interested in Iterable's AI suite.
- Have Iterable schedule a **1:1 AI demo** based on your priorities and impact areas.
- Ensure **AI standard features are 'turned on'** for use.
- If **AI premium** features align to your priorities, use cases, and impact areas, ensure that this is added on to your contract.
- Ensure your **data schema is scoped** to best support/power select AI features (Predictive Goals).
- Continue your **AI learning journey** with Academy and support docs (next slide).



Suggested Action Plan *(already using AI/Predictive Goals)*

- **Continue working with your CSM** on results, testing, and performance plan.
- **Share baseline metrics** for all AI enhanced campaigns to showcase results that AI and campaign strategy are driving.
- **Have a regular and consistent check-in** for analyzing results and campaign optimizations to continue to drive outcomes.
- Continue your **AI learning journey** with Academy and support docs (next slide)

AI Resources

Support Docs

AI & Experimentation Overview
Copy Assist
Send Time Optimization
Channel Optimization
Brand Affinity™
Predictive Goals
Frequency Management Optimization docs coming soon - in Beta
Next Best Action docs coming soon - in Beta

Academy Courses

AI Catalog
Product Bite: Copy Assist
Product Bite: Send Time Optimization
Course: Brand Affinity
Product Bite: Channel Optimization
Course: Predictive Goals
Optimization courses coming soon - in Beta
Next Best Action courses coming soon - in Beta

How did we do?

Slido (code: 2260752)





ITERABLE

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scan to follow us on all social platforms.