

Five Elements of Personalization

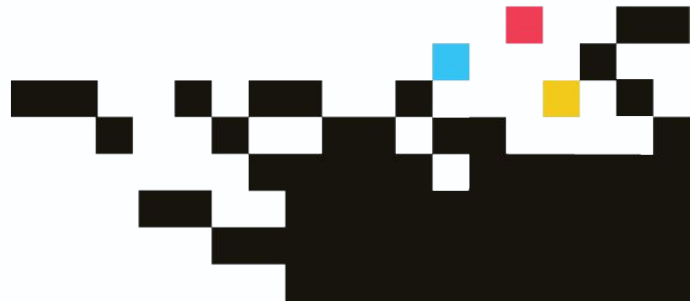
Using data to craft relevant automations and campaigns that increase conversions (and doing it at scale).



Hi, I'm Dina

A little about me

- Iterable user 4.5 years
- Previously CRM manager at a Vancouver-based start up
- B2C marketing at Fullscript since 2022
 - *Iterable implementation*
 - *Patient funnel optimizations*
 - *Patient go-to-market campaigns*



Today you'll walk away knowing

How we leveraged data, at scale, to take personalization to the next level.

- A bit about Fullscript
- How to identify valuable data to fuel personalization
- How to implement the 5 elements of personalization in your own marketing automations and campaigns
- How Fullscript used this strategy to increase revenue per email by 130%

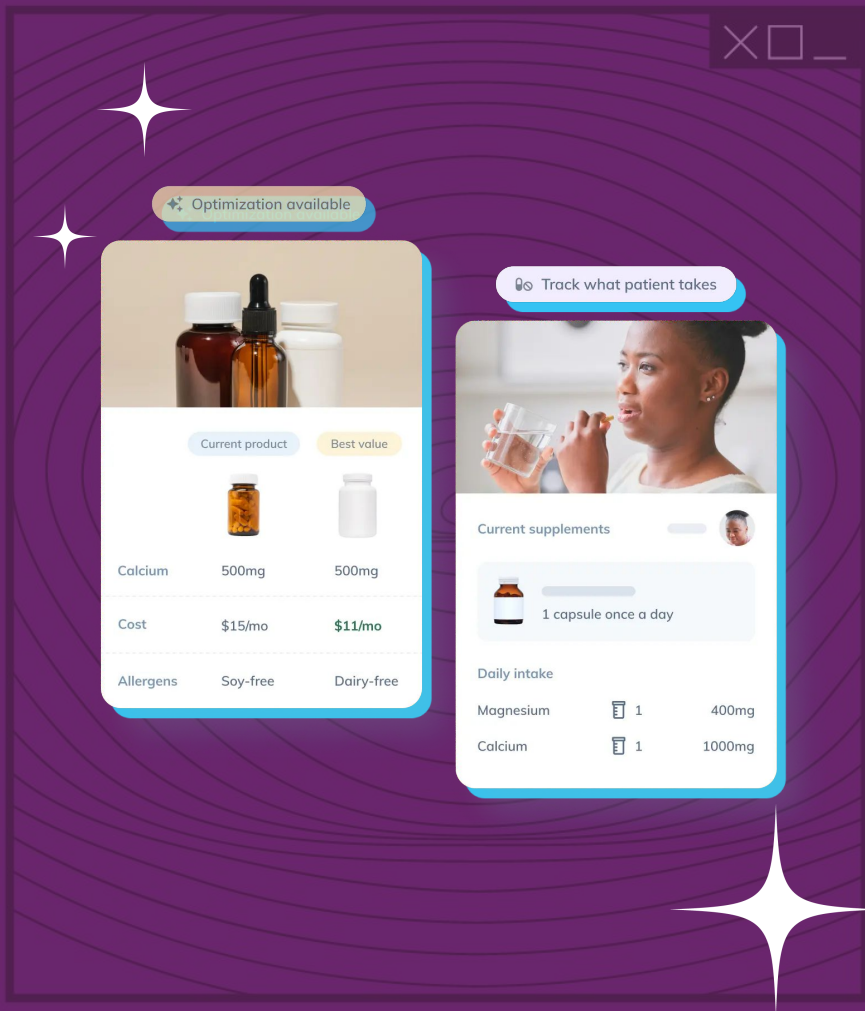


What is Fullscript?

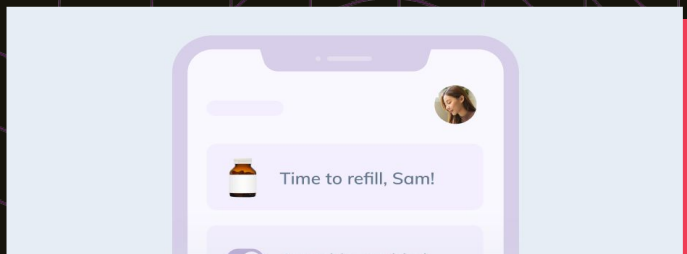
B2B2C health tech platform that helps create an ongoing cycle of whole person care by giving providers a single platform that brings together industry-leading labs, clinically effective supplements, and an intuitive suite of tools to promote adherence and outcomes.

This is a tool that helps providers (think: Naturopaths, MDs) to give patients preventative, whole person care.

The majority of our communications are sent as automations, especially on the B2C side.



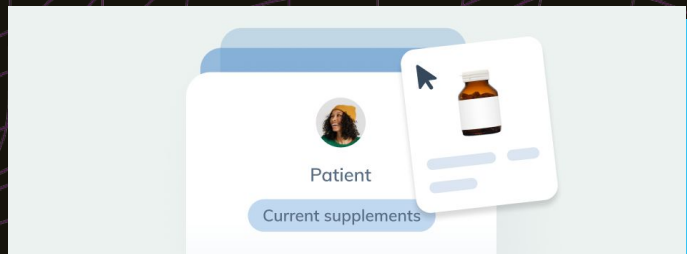
2 categories of data



Behavioural

Groups users based on purchasing behaviour and types of purchases.

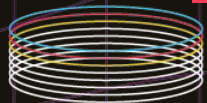
- What purchasing behaviours differentiate a sticky customer from a regular one?
- Are they a first time customer or a returning customer?



Engagement

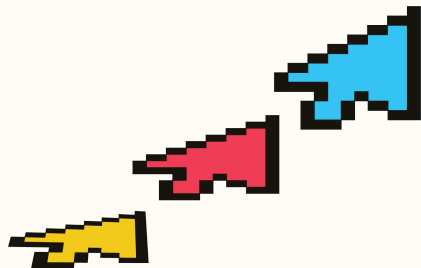
How users engage with our platform and communications.

- Have they clicked a marketing email in the last 30 days?
- Have they logged into my site?
- What categories or features are they engaging with or adopting?



Tip: Become BFFs with data analysts (or someone who is data savvy).

5 elements of personalization



Copy that feels personal and informative.



Content that delivers relevant information.



Timing that is relevant for the customer.



Frequency that isn't annoying.



Channel that makes sense for the communication and the customer.

1. Copy

Use the right words to ensure the message is relevant and not generic. You can tailor the language based on past behaviour and intent.

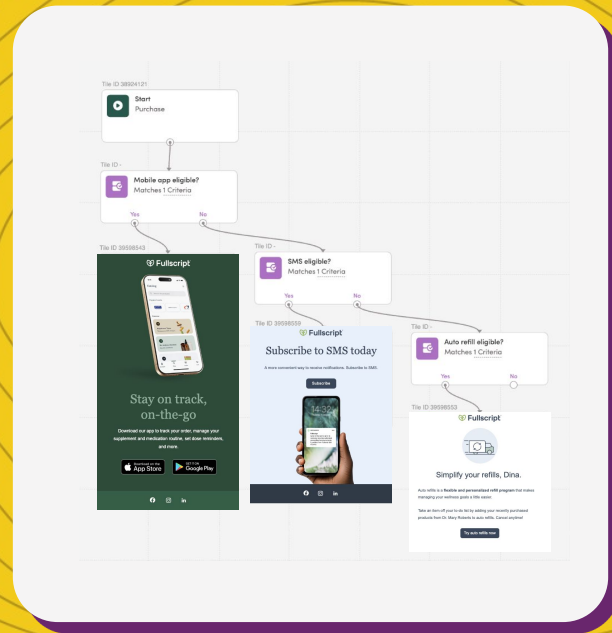
- **Example:** You can be invited to Fullscript by more than one provider. The invite CTA is tailored based on if you are an existing patient or not.



2. Content

The contents of the communication need to provide value. Consider what actions the user just took, may take next or may add value to their experience.

- **Example:** In our post purchase journey, patients could either may be educated about auto refills, our mobile app, or given the option to opt in to SMS.
- **Example:** In many of our triggered comms we only show a mobile app footer if you don't already have it downloaded.

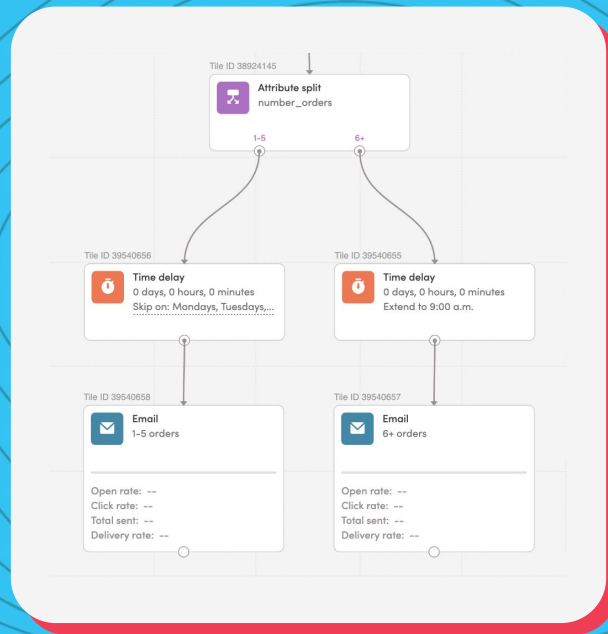


3. Timing

Reaching a user when it makes sense can make or break your comms. It's important to balance being proactive without being annoying.

- **Example:** We delay refill reminder comms based on the number of orders you've placed previously.

💡 **Tip:** Use data-driven A/B tests to determine the right timing for your audience and touchpoints. You can even test with Iterable's STO.

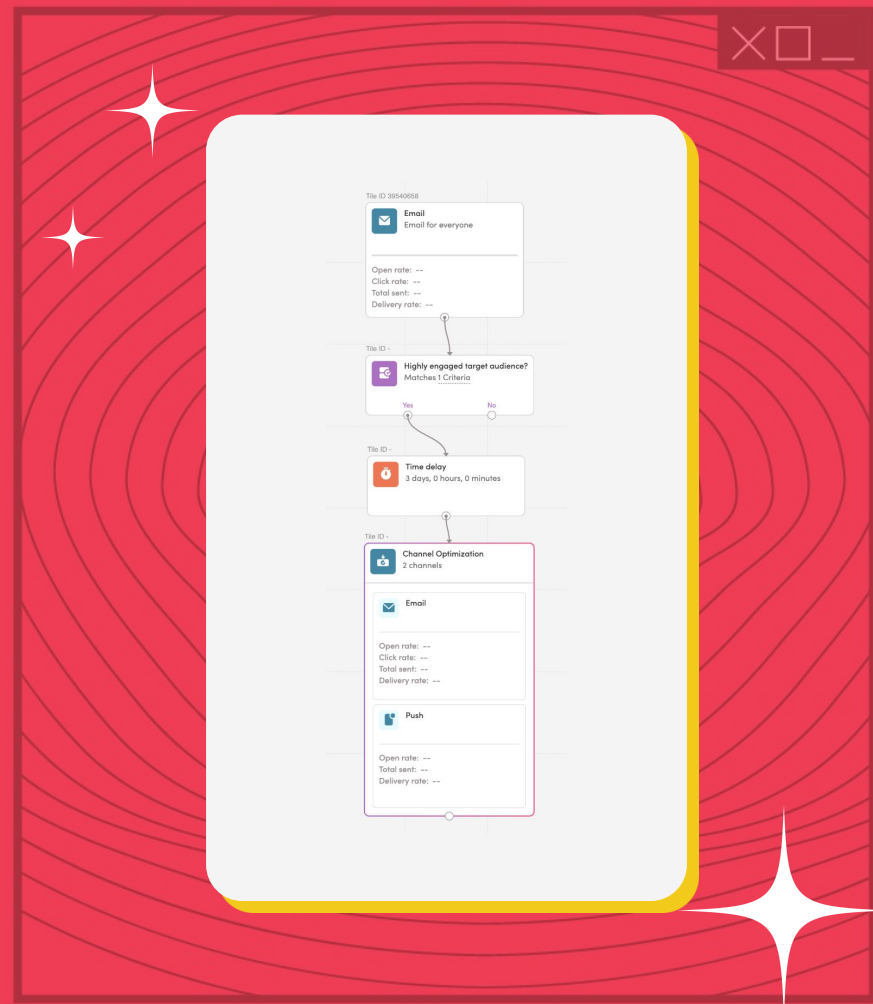


4. Frequency

Finding the balance between too many and too little is key. Considering how engaged a user has been can help inform how frequently to communicate with them.

- **Example:** For highly engaged users, we remind them twice about activating auto refills once their provider adds a discount. For less engaged, just once.

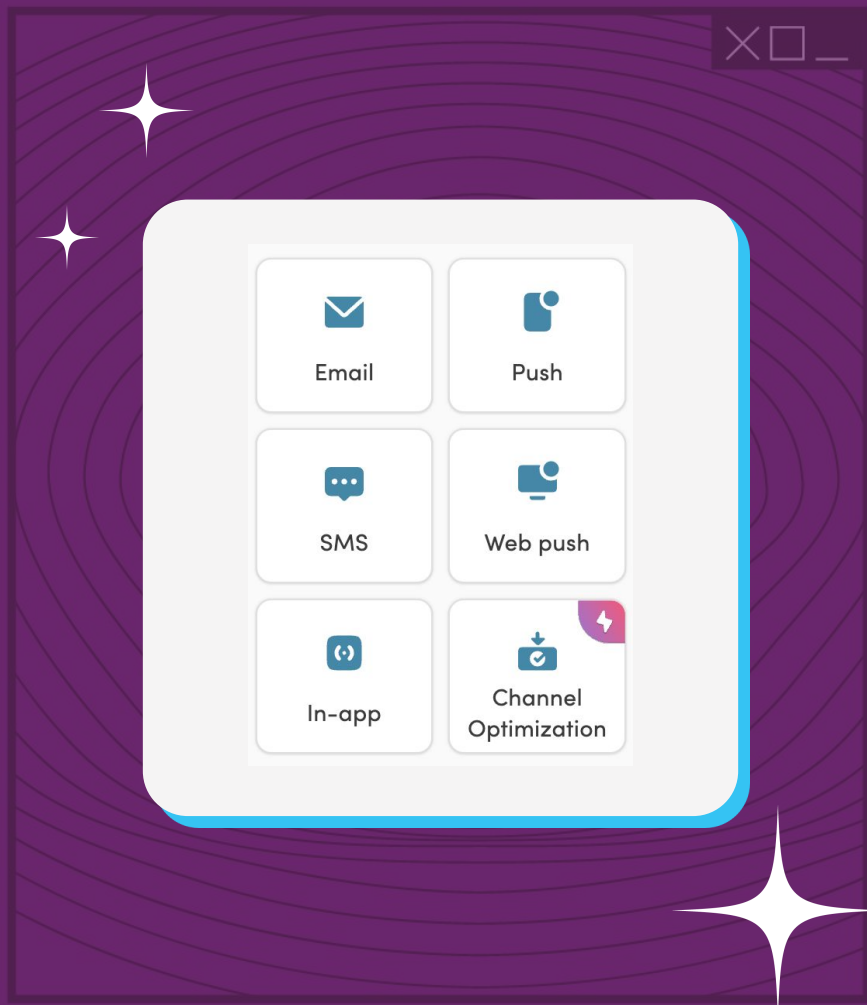
💡 **Tip:** For email, consider deliverability/ESP impact.



5. Channel

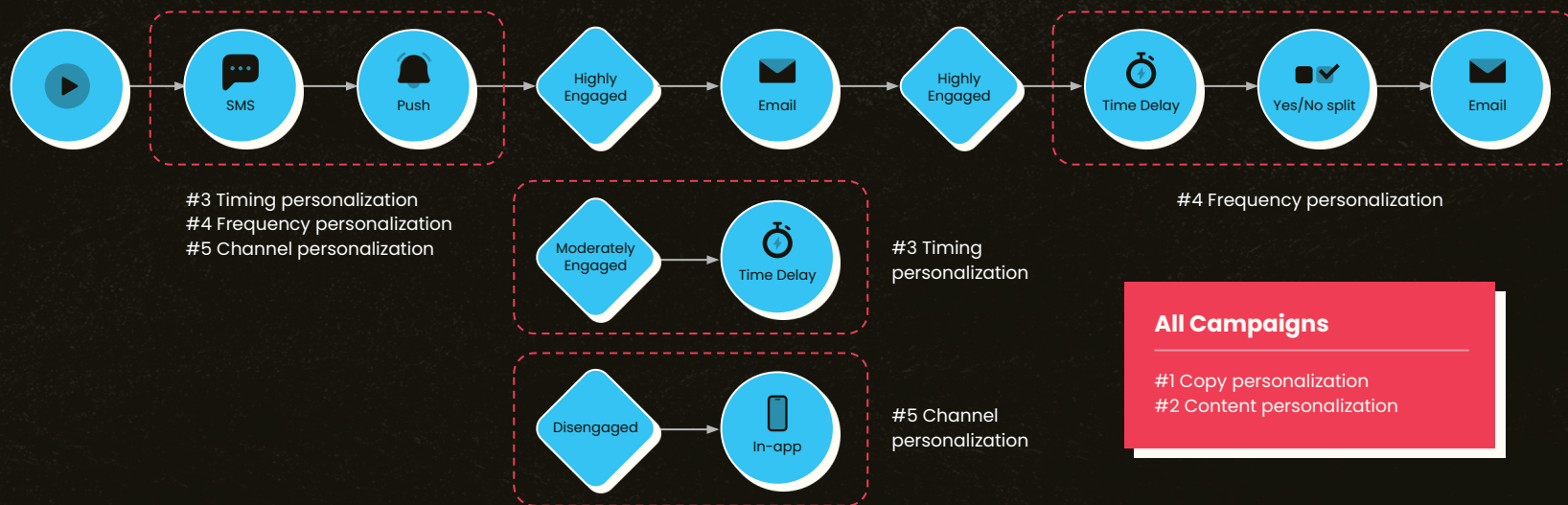
Meet the user where they are. Consider the channels they are likely to engage with and the best channel for that type of communication.

- **Example 1:** If you're eligible for push notifications, that's the only way we notify you of a delivery.
- **Example 2:** If you're eligible for push notifications & SMS we only use one at a time.



How we achieved 130% increase in revenue per email

Using a journey to execute a personalized blast campaign.



Actionable takeaways

Nailing down the trends and data

Cross-functional input



Consult internally to get additional ideas and perspectives on the data points you could use.

- Does the CS team get common feedback that could be addressed with updated copy?
- What trends does the product division see that you could leverage?
- Set up journeys to track characteristics at certain key stages for each users.

Identify key segments



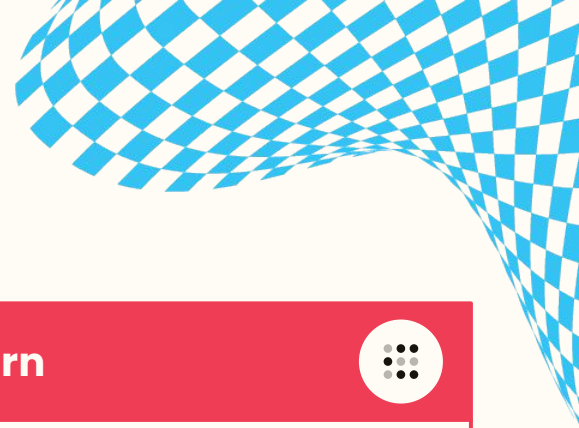
Use the data you have at hand to get started.

- Review audience segmentation from a recent key campaign.
- Consider the goals of your campaigns or metrics you're trying to move.
- Use AI tools to help analyze the data.



Actionable takeaways

Putting the data to work



Start small



Pick one new thing to try so it doesn't seem too daunting. Then iterate and add onto it. Some easy tests to execute:

- Test delays or STO.
- Send a reminder to those who didn't convert.
- Change the CTA language.

Test, fail and learn

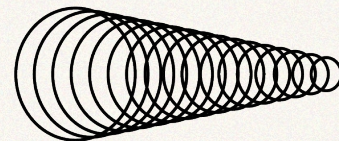
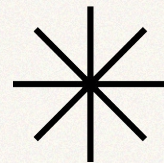


The first try likely won't be the way forward. But what can you learn from it—good and bad—to inform the next iteration?

- Document & report on learnings. Apply them to other touchpoints.
- When something goes really well or really wrong, understand why.



Actionable takeaways



1

Gather data from within your organization.

2

Organize the data into key segments that you can use for campaigns.

3

Start personalizing with A/B tests and record what you learn.

4

Iterate on your tests based on new learnings and data points.



Questions?

WE'D LOVE YOUR FEEDBACK

Here's how to fill out the session survey:

1. Download/Open the Activate app
2. Toggle to the **Agenda** tab
3. Tap on this session
4. Scroll to **Engagement** and tap **Survey**

BONUS

Complete the survey to earn points you can redeem for prizes at **The Market @ Activate!**



**RECORDING WILL BE
AVAILABLE ON APRIL 10TH!**



Thank you!





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Dina McClelland

Sr. Manager, Lifecycle Marketing

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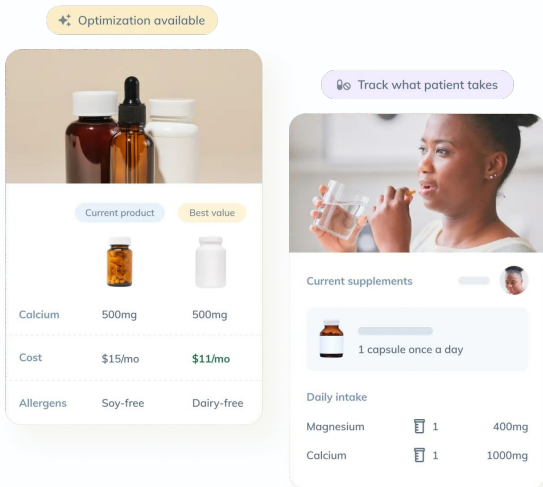


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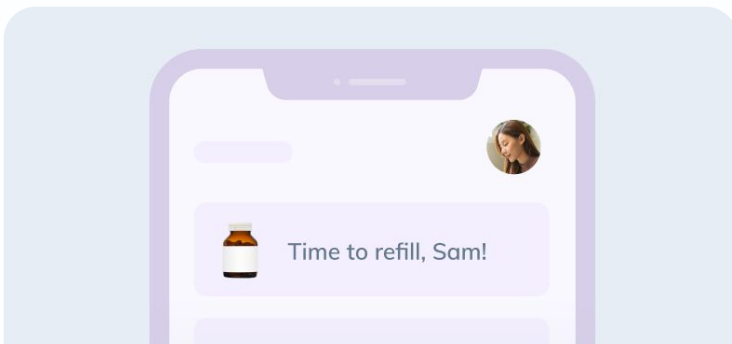
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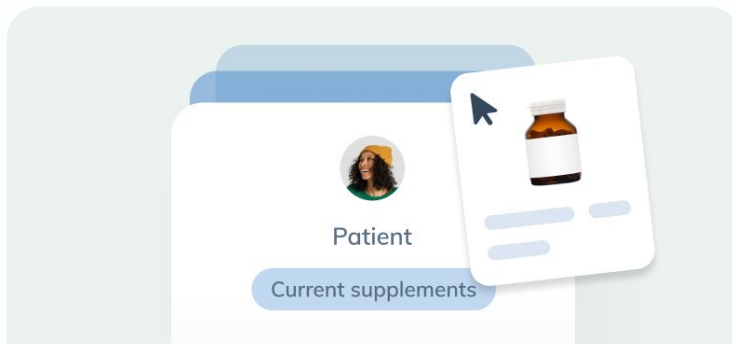
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{{first_name}}, join
{{provider_full_name}} on
Fullscript 

{{provider_full_name}} has invited you to join their Fullscript
dispensary.

{{#if existing_patient}}

Log in

{{else}}

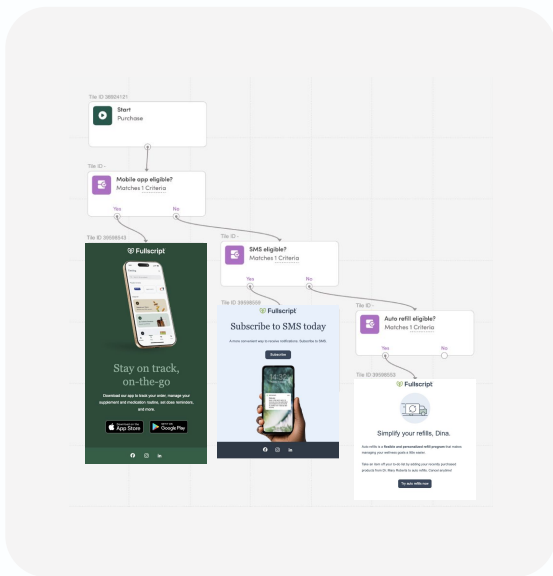
Accept invitation

{{/if}}

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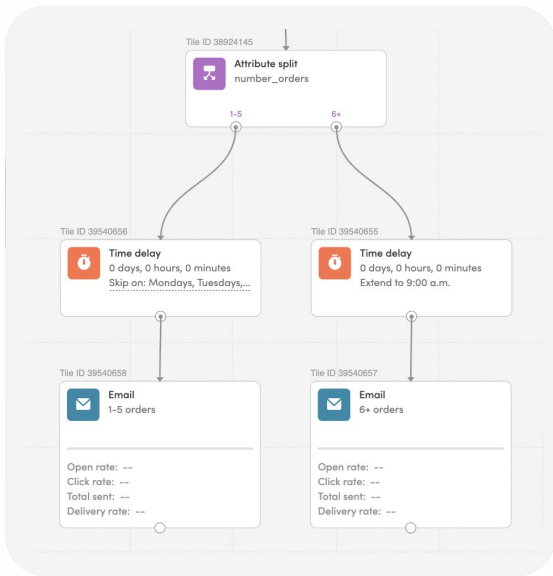
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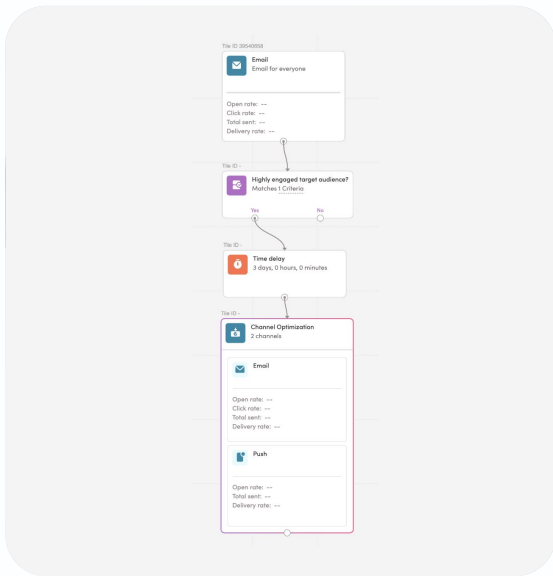


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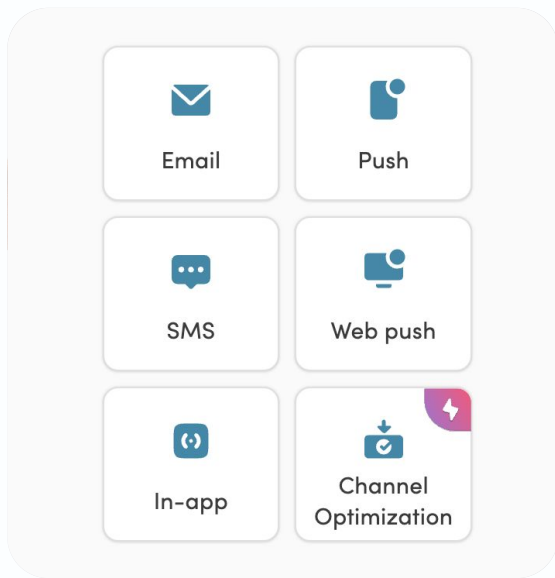
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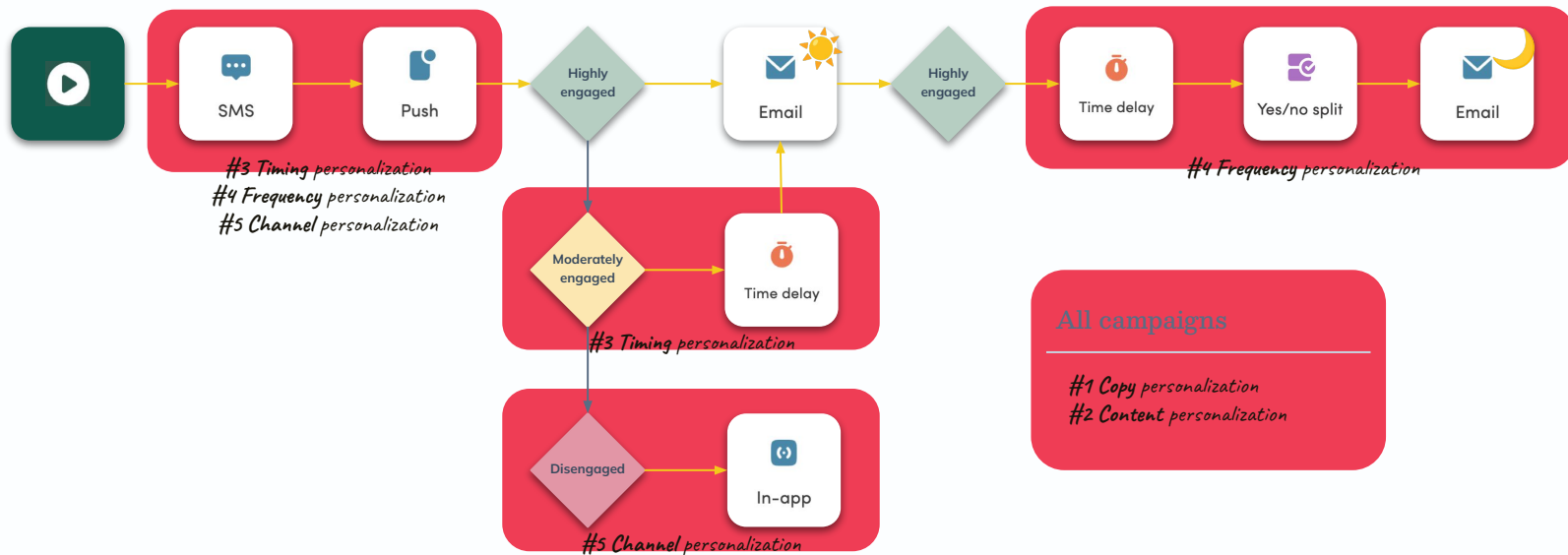
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