Email Personalization

15 EXAMPLES THAT GO WAY BEYOND {FIRST_NAME}
TABLE OF CONTENTS

PERSONALIZATION OVERVIEW

EMAIL PERSONALIZATION ........................................................................................................................................... 03
WHAT IS EMAIL PERSONALIZATION, EXACTLY? ........................................................................................................ 04
TRIGGERED EMAILS .................................................................................................................................................... 04
OPEN-TIME PERSONALIZATION .................................................................................................................................. 05

PERSONALIZATION USE CASES

E-COMMERCE

TRIGGERED EMAIL: ABANDONMENT (CART, BROWSE, SEARCH) .................................................................................... 06
TRIGGERED EMAIL: INVENTORY OR PRICE CHANGES .................................................................................................. 07
TRIGGERED EMAIL: POST-PURCHASE FOLLOW-UP ........................................................................................................ 08
TRIGGERED EMAIL: TYING ONLINE AND OFFLINE INTERACTIONS .................................................................................. 09
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE BEHAVIORS ......................................................................... 10
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE PRICING OR INVENTORY ...................................................... 11
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE INTENT OR PREFERENCES .................................................... 12

DEMAND GENERATION

TRIGGERED EMAIL: ABANDONMENT (FORM, BROWSE) .................................................................................................. 13
TRIGGERED EMAIL: NEW CONTENT ADDED .................................................................................................................. 14
TRIGGERED EMAIL (INTERNAL): LEAD NOTIFICATIONS .................................................................................................... 15
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE BEHAVIORS ........................................................................ 16
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE PREFERENCES OR INTENT .................................................. 17

CUSTOMER SUCCESS

TRIGGERED EMAIL: ONBOARDING .................................................................................................................................. 18
TRIGGERED EMAIL (INTERNAL): ALERT INTERNAL TEAMS TO MAJOR ACTIVITY CHANGES ................................................. 19
OPEN-TIME PERSONALIZATION: REFLECT UP-TO-DATE BEHAVIOR ................................................................................ 20
These days, there is certainly a lot of talk about personalization. Digital marketers are eager to connect more effectively with their prospects. And customer experience experts are keen on the benefits of delivering more relevant and engaging experiences to customers. But if you have been personalizing your emails for years — as most marketers across industries have been doing — it can be easy to tune all of this out assuming it doesn’t apply to you.

News flash: it does apply to you! The level at which most marketers are personalizing their email communications — which may have been sufficient in the past — does not cut it today. One major reason is email overload. The number of emails sent last year was 15% higher than the prior year, yet consumers opened 15% fewer of those emails.¹ The Radicati Group estimates that by 2021, the number of business and consumer emails that are sent per day will reach 319.6 billion.² Marketers are sending more and more emails to capture the attention of their audiences, but consumers and business buyers can’t get to everything in their inboxes. The other major reason email recipients are so frustrated is the lack of value being delivered in those emails. All it takes is one irrelevant email for a recipient to begin to tune out your messages — or worse, to unsubscribe.

Even if you are personalizing your emails, are you doing enough to cut through all of the noise? Are you just incorporating someone’s first name or company name to “personalize” your email? In this eBook, we’ll outline what successful email personalization truly looks like.


What Is Email Personalization, Exactly?

When we talk about personalized emails, we mean emails that meet two criteria:

- Sent at the right moment in the person’s journey or relationship with the company, otherwise known as **triggered emails**.
- Containing accurate and relevant information to the recipient at the moment the email is opened, otherwise known as **open-time personalization**.

Let’s dive into each type of email personalization.

**TRIGGERED EMAILS**

Traditional “batch and blast” emails are sent to a large audience at a time that is determined by the marketer. Triggered emails, in contrast, are sent to individuals on a one-off basis and only when certain criteria are met. Essentially, triggered emails are sent at the right time for the individual, rather than the marketer.

Triggered emails are generally based on “IF/THEN” rules. For example, IF a visitor leaves an item in her shopping cart, THEN trigger an email reminding her to complete her purchase.

Of course, this is a simple but good example for an e-commerce site. The IF/THEN logic can also be leveraged to trigger emails with more specific scenarios. For example, IF a person who downloaded a white paper about web security has not returned to a B2B site in the past week AND no activity has been logged by a sales rep for this lead in the CRM system, THEN trigger an email containing the most recently published content on web security that the person has not yet consumed.

**Different situations that can trigger emails:**

- **BEHAVIOR-DRIVEN**
  For example, a visitor or user takes an action (or fails to take an action) on your site or in your app.

- **CATALOG-DRIVEN**
  For example, new products are added to your catalog, new content is published, or changes are made to existing items like price, availability, etc.

- **EXTERNAL-DRIVEN**
  For example, weather changes in a particular geography.

Triggering an email allows you to better time your message to increase the chances that it is read and acted upon. But how do you ensure that the content of the email itself is relevant? That’s where open-time personalization comes in.
To make the content of an email maximally relevant to the recipient, you need to consider all you have learned about that person—across touch points—particularly in terms of his or her history and preferences. In-depth behavioral data gathered from the website and mobile app channels can tell you a lot about what someone’s genuine interests are. That data can be combined with attribute data from outside sources (such as someone’s location, loyalty program status, etc.) to give you a clear picture of each individual.

To be truly relevant, a personalization system needs to sift through everything that is known about a person to automatically select the content that is sure to grab their attention and add value. But what is relevant to a person at one moment may be out of date to that same person later. You have no control over how and when your email is consumed—once the email leaves your servers, the recipient chooses when to consume the information. He or she could open it within a minute, a day, or a week from the time that it’s sent. If you’re lucky, they may even open it multiple times, but those opens could be days or weeks apart.

During this time, circumstances can change. A recipient could have already responded to an offer sent by email, or he could have shown interest in something completely different. The key is to be relevant at open time, rather than at send time. By personalizing your emails at open time, you have the opportunity to display the latest or most accurate information (like availability, pricing, inventory levels, etc.), show the most appropriate recommendations by factoring in completely up-to-date information about the person’s preferences, and avoid suggesting an action that someone has already taken or dismissed.

Essentially, if the content of your emails cannot update dynamically at the time the email is opened, you are missing a valuable opportunity to be relevant.

In the rest of this eBook, we’ll delve into some of the most common examples for email personalization—both triggered and open-time. We’ll focus on three main use cases for email personalization: e-commerce, demand generation and customer success. Chances are, your business is focused on one or more of these areas. Use these examples as inspiration for improving your own email marketing strategy.
**E-COMMERCE**

**Triggered Email: Abandonment (Cart, Browse, Search)**

**CHALLENGE**
After all the work it takes to drive traffic to your e-commerce site, it’s disappointing when a shopper shows interest but leaves before making a purchase. But just because she left your site doesn’t necessarily mean she isn’t interested. She might just need to consider her purchase or do additional research first. How can you identify which shoppers are truly interested so you can reach out and bring them back to the site?

**SOLUTION**
Most retailers are already familiar with triggered emails targeted at shoppers who leave unpurchased items in their cart (“cart abandonment messages”). But there are other actions that can also indicate interest and may warrant a triggered email which may be less obvious. One such example is search abandonment — when a visitor abandons a session after conducting a search on a site. Triggered emails can also be sent to browsers who may not have added an item to a cart or searched for anything specific, but demonstrated interest in a particular item or category by spending a lot of time on certain pages.

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If a shopper searched for cat collars before abandoning this pet supply site, trigger an email recommending other cat collars she may be interested in. The email could even contain personalized category recommendations based on what is known about her interests — encouraging her to return to the site to keep exploring.
Triggered Email: Inventory or Price Changes

**CHALLENGE**
Some shoppers may show interest in a specific product on your site but are not ready to purchase. Any notification that time is running out for them to get the products they want — at the right price — could be what nudges them toward conversion. How can you inform an interested shopper that circumstances are about to change with the product he was interested in?

**SOLUTION**
You can send shoppers timely emails triggered by any pricing or inventory changes to those products in which they have shown recent interest. Was a shopper spending time researching a product that is currently running low in stock? Send him an email warning him that there are only five items left. Did the price just drop? Trigger an email announcing that he should act now to take advantage of the lower price. Was he engaged with an out-of-stock product? Trigger an email informing him when it’s back in stock.

Don’t Miss Out! Only 1 Left in Stock!

**MAN THINGS**

Hi Andrew,
We know you were interested in it, so we wanted to let you know there’s only 1 Premium Hinkle Series® Razor left in stock!

![Premium Hinkle Series Razor](image)

Premium Hinkle® Series Razor
$25.99

MAN UP

If a shopper has recently engaged with a particular razor on a retailer’s site or mobile app but hasn’t purchased it yet, trigger an email announcing when there are only a few left in stock to drive prompt action.
Triggered Email: Post-Purchase Follow-Up

**CHALLENGE**
Many retailers opt to trigger an email a week or so after a purchase has been made. Oftentimes, such emails are generic — thanking the shopper for his purchase and asking him to take a satisfaction survey or submit a review. But this approach misses a valuable opportunity to be relevant to the individual and potentially drive follow-on sales.

**SOLUTION**
Post-purchase emails are a great opportunity to demonstrate that you understand the shopper, add value after a purchase, and drive upsells. With that in mind, triggered emails sent after a purchase should be as personalized as much as possible and include relevant, individualized product or content recommendations.

A shopper on a home improvement site purchases an oven, but her behavior on the site indicates that she may be planning a larger project such as a kitchen remodel. Send her a post-purchase email with recommendations for the rest of the kitchen, as well as a remodeling guide and other articles.
**CHALLENGE**
Retail marketers have been striving to deliver one-to-one personalized experiences across channels for years. They have struggled to do this effectively because many retail organizations have different teams, systems and datasets dedicated to each channel. Bringing all of these together in real time to recognize a person across channels and deliver an individualized experience is understandably difficult.

**SOLUTION**
With the right solution, online and offline data can be brought together in one place, interpreted and acted on in real time. Once a shopper provides his email address to a cashier, for example, his in-store purchase can trigger an emailed receipt. That email can contain individualized product recommendations that are relevant to the shopper based on his past shopping experiences as well as products that pair with his in-store purchases when applicable. This email can, in turn, drive him back to the site for more shopping.

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Hi Paula, Thanks for your recent purchase!

Household Goodness <householdgoodness.com>
theadirlhalpaula@gmail.com

Hi Paula, We hope you enjoy your new duvet cover set.

ORDER NUMBER: 0098547
Goodness Plus Duvet Set - Pastel
$109.99

Questions? Contact us at: 1-888-754-0000

WE THOUGHT YOU MIGHT LIKE THESE ITEMS

Dreamy Beach Accent Pillow Set
$59.99

Sheets Of Many Colors - Deluxe Set
$70.99

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A shopper in a home goods store purchases a duvet cover set. At checkout, the cashier asks for her email address. An email receipt can be automatically sent to her containing recommendations of sheets and pillows to pair with the duvet cover, based on her preferences uncovered from her recent behavior.
Open-Time Email Personalization: Reflect Up-to-Date Behaviors

CHALLENGE
Between when an email is sent and when it is opened, a person can take additional actions that cause certain CTAs, offers or messaging to become outdated. You never want to recommend a product that someone has just purchased, for example. In addition, you don’t want to miss an opportunity to recommend something that could drive another transaction or engage the recipient in a positive way.

SOLUTION
If you personalize your emails at open time, you can account for any recent behaviors that may have otherwise made your message obsolete. Avoid recommending items the shopper already purchased. Don’t recommend a product he has recently removed from his cart. Don’t suggest products to pair with an item he just returned. These kinds of messages will make you look like you don’t understand your customers and can tarnish your brand.

ELEKTRIKcity
Hi Walt,

The industry-leading Z100 Series Printer is waiting for you.

BUY NOW

RECOMMENDED FOR YOU

3pk Notebooks - $19.99
BUY NOW

Deluxe Pen Set - $25.99
BUY NOW

Premium Calculator - $21.99
BUY NOW

A shopper browses an office supplies site and adds a printer to his cart but doesn’t purchase it right away. It’s wise to send a triggered email shortly thereafter to encourage him to return to purchase the printer. However, what if he does buy the printer and later re-opens the email? Rather than miss the opportunity to be relevant and helpful again, the content of the email can be personalized at open time to recommend complementary ink or paper instead of the printer he already purchased.
Open-Time Email Personalization: Reflect Up-to-Date Pricing or Inventory

**CHALLENGE**
Most retailers’ catalogs are continuously changing. Between when an email is sent and when it is opened by a given recipient, a lot can happen. The price of the products you recommend in the email could have gone up or down. An item may have gone out of stock, or a previously out-of-stock item the shopper was interested in may have been restocked. When the shopper clicks through an email to learn more about a featured product only to discover the price was inaccurate or it is out of stock, she will likely become frustrated with your company.

**SOLUTION**
Avoid irritating your shoppers by reflecting the most up-to-date pricing and inventory information every time an email is opened. If the price has changed, make sure the accurate price is shown in the email. If an item is low in stock, encourage the shopper to buy now while supplies last. And if the item goes out of stock, remove it from the email and suggest a different — but still relevant — alternative.

If a footwear retailer sends an email recommending two pairs of shoes to a regular shopper, the pricing and inventory levels of those products should be updated in real time as the email is opened. If one pair goes on sale and the other goes out of stock, the price of the first pair of shoes should be updated and the second pair should be replaced with another relevant product recommendation – all done in the moment the recipient opens the email.
Open-Time Email Personalization: Reflect Up-to-Date Intent or Preferences

**CHALLENGE**
A shopper's behavior across channels are a valuable clue into her intent and preferences. But a person's preferences can evolve over time, and what she had once intended to purchase may no longer be important to her. It doesn't make sense to send someone an email suggesting products that meet a need a shopper no longer has.

**SOLUTION**
Make sure your emails are updated at open time to account for everything you know about the recipient's most current interests and intent. If a shopper has shown interest in a particular category on your site or in your app in the past but, more recently, has spent more time browsing another category, make sure at least a few of your email product recommendations are for this new category. Otherwise, your message will seem behind the times.

A shopper on this women's apparel site may have originally demonstrated a strong affinity for dresses. But later, when she returned to the site, she spent more time browsing shirts and blouses — even adding one to her shopping cart. Therefore, show recommendations for appropriate tops — in addition to dresses — to reflect a fuller understanding of her needs.
Triggered Email: Abandonment (Form, Browse)

**CHALLENGE**

According to SiriusDecisions, 67% of the buyer’s journey is done digitally. In order to effectively communicate with prospects in digital channels, B2B marketers must be able to recognize where each account falls in its research journey and provide relevant content. But many marketers simply rely on nurture tracks with preset cadences to push content they think will lead the prospect through the funnel — rather than utilizing information about that specific prospect.

**SOLUTION**

Triggered emails allow you to send a communication that aligns to a prospect’s stage of the journey — based on his actions and his colleagues’ actions on your website. If a visitor spends time on your site, you know he is thinking about and researching your company and offerings. That’s an ideal time to reach out with relevant content that makes sense based on where that prospect’s organization is in the buying process and what that individual visitor’s areas of interest are.

If three people from one of this tech company’s target accounts visit its website in the same week, it would seem that the organization is in the market for their solution. Trigger an email to the right individual(s) at this account containing case studies or other content pertinent to the industry or solution areas they’re researching.

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**Triggered Email: New Content Added**

**CHALLENGE**
Sending regular newsletters to clients and prospects is a common tactic employed by B2B marketers. But newsletters are often sent too frequently and contain content that isn’t relevant to most of the audience. Recipients, in turn, start ignoring such emails and, worse, unsubscribing from future email communications.

**SOLUTION**
If you have a lot of content you’d like to push out to your opt-in subscribers, consider triggering your newsletter-like emails at the right moment instead. With this approach, the emails will be sent only when you have generated enough relevant content for each person in their preferred topics or categories (so that each email contains only new and individually relevant information).

For this B2B blog, instead of sending a newsletter at a regular cadence (such as weekly or monthly), trigger one-off emails to individual subscribers once there are enough newly published articles that will be relevant to the recipient.
Triggered Email (Internal): Lead Notifications

**CHALLENGE**
When it comes to making a sale, timing is everything. If a prospect from a target account reads a few case studies or watches a couple product videos on your website, you want the appropriate salesperson to know about it right away and to follow up while your company is still top-of-mind for the prospect. But what’s the best way to relay that information to the sales rep in a manner that will catch their attention?

**SOLUTION**
Internal email alerts are the perfect solution for this challenge. These emails can be triggered the moment one or more visitors from a target account takes certain actions on your website, alerting the designated sales team member(s) of the account’s recent activity. This allows her to provide personalized outreach, timed at the opportune moment.

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If someone from Acme Corp, a B2B company’s target account, visits the website, views several pages and downloads an eBook, trigger an email to inform the account’s sales rep of the activity and prompt her to follow up while the prospect is thinking about the company.
Open-Time Email Personalization: Reflect Up-to-Date Behaviors

**CHALLENGE**

Many demand gen marketers send email campaigns to encourage prospects to engage with their content. Open rates for such emails are generally quite low (often under 10%), but when people do open your emails, you want to be sure they contain relevant and engaging information for each individual recipient. Otherwise, you’ve wasted an opportunity to guide the prospect forward in their journey.

**SOLUTION**

Any email that is sent to a prospect should contain content that reflects the most up-to-date information you have about the actions the person has already taken. Has she already downloaded that eBook? Don’t feature it in an email! Is she already signed up for that webinar? Don’t promote it to her again! Has she already read certain blog posts? Don’t recommend those! This seems obvious, but if you can’t personalize your emails at open time, you aren’t able to avoid these potentially embarrassing situations.

A financial services firm sends out an email promoting an upcoming webinar to prospective clients. A recipient who learned about the webinar elsewhere has already signed up for the webinar before opening the email. At open time, the content of her email is updated to acknowledge her registration and suggest a few relevant resources to check out in advance of the webinar.
Open-Time Email Personalization: Reflect Up-to-Date Preferences or Intent

**CHALLENGE**
When you are able to interpret the context of a person’s behavior on your website, you can infer her preferences and in-the-moment intent. That information can be used to send her relevant content that will catch her attention. But a person’s interest may change between when the email is sent and when it is opened. How can you ensure the message is relevant regardless of when the email is read?

**SOLUTION**
Personalizing your emails at open time allows you to reflect the most recent information you have about a prospect. If a prospect has returned to the site and started browsing a different topic between the time an email is sent and when it is opened, that new interest can be reflected in the email content. You are not stuck with the content that was sent in the initial email if circumstances have changed.

If a prospect was initially on this software company’s blog demonstrating interest in the “marketing attribution” topic, the blog recommendations in a follow-up email should be around that subject. But if between the time the email was sent and opened she was back on the site browsing articles under the “A/B testing” topic, it would be more effective if the recommendations in the email were updated – in real time – to reflect both topics.
Once prospects become customers, they need to be onboarded to your product or service. Inevitably, some customers will start the onboarding process but drop off before completing it. If they don’t go through all of the required steps, they may not receive all of the value of your solution — or they may not be able to get started at all. How can you remind customers of incomplete actions?

**Triggered Email:**

Once a user has completed all the required onboarding steps for this software-as-a-service (SaaS) solution, trigger an email to her to thank her for completing the steps and suggest content she may find valuable as she begins using the solution.
Triggered Email (Internal): Alert Internal Teams to Major Activity

**CHALLENGE**
User activity changes in a logged-in environment can tell you a lot about a customer and the status of your relationship. If a customer consistently logs in to your web or mobile application at least once a week but then stops logging in for a while, it may be an indication he is no longer receiving value from your solution or may even be thinking about leaving. Alternatively, if he begins logging in more frequently or using more features, he might be a good candidate for upsell or advocacy activities. Both of these situations warrant follow-up from a customer representative. How can you alert that person?

**SOLUTION**
Significant changes in user activity can be communicated to customer success or account management team members right away via an internal triggered email. The emails can indicate when a customer relationship might be at risk or open to expansion and encourage the representative to follow up with a personal touch.

We haven’t seen Lisa Lolly from Acme Corp in a while...

Hi Customer Engagement Team,

We’re sending out this user activity alert to inform you that it’s been 3 weeks since we’ve encountered activity from Lisa Lolly from Acme Solutions.

An email has been sent to Lisa within 1-2 business days.

Best Regards,

emission media customer retention team

If a customer who usually logs into a media site once or twice a week suddenly stops logging in for several weeks, trigger an email to a customer representative encouraging her to follow up with the customer.
Open-Time Email Personalization: Reflect Up-to-Date Behavior

**CHALLENGE**
Customer success, product management or marketing teams often send regular emails to customers to keep them engaged, make them aware of upcoming events or content they may be interested in, and/or help them achieve success with the product or service. But you never want to frustrate your existing customers by sending them too many emails containing irrelevant information. How can you avoid suggesting actions they have already taken or recommending content they have already consumed?

**SOLUTION**
You are constantly learning about your customers from their in-app behavior and the actions they take on your website or via other channels like online chat or your call center. Use that information to understand their needs, challenges and interests and personalize any email to them at open time to ensure the information they receive is valuable and never out of date.

When sending out a monthly update to this SaaS platform provider’s customers, rather than sending the same content to everyone, personalize the email to each individual at open time. If a customer initially receives an email containing several support articles but she downloaded one of them between the time the email was sent and she opened it, a different relevant article can be shown in its place.
Take Your Email Communications to the Next Level

Are you using both triggered email and open-time personalization to send relevant content to your email recipients that they value and act on? If not, now is the time to start.

Cut through the clutter of today’s overstuffed inboxes with true email personalization. And make sure to partner with the right organization to help you take your email program to the next level.
About Evergage

Evergage’s real-time personalization platform delivers The Power of 1, enabling digital marketers to transform the dream of 1:1 customer engagement into reality. Combining in-depth behavioral analytics and customer data with advanced machine learning, Evergage provides the one platform you need to systematically understand and interact with each person that visits your site or uses your app – one at a time, “in the moment” and at scale – to deliver a maximally relevant, individualized experience.

Contact Evergage at 888-310-0589 to speak to an expert about your needs today!