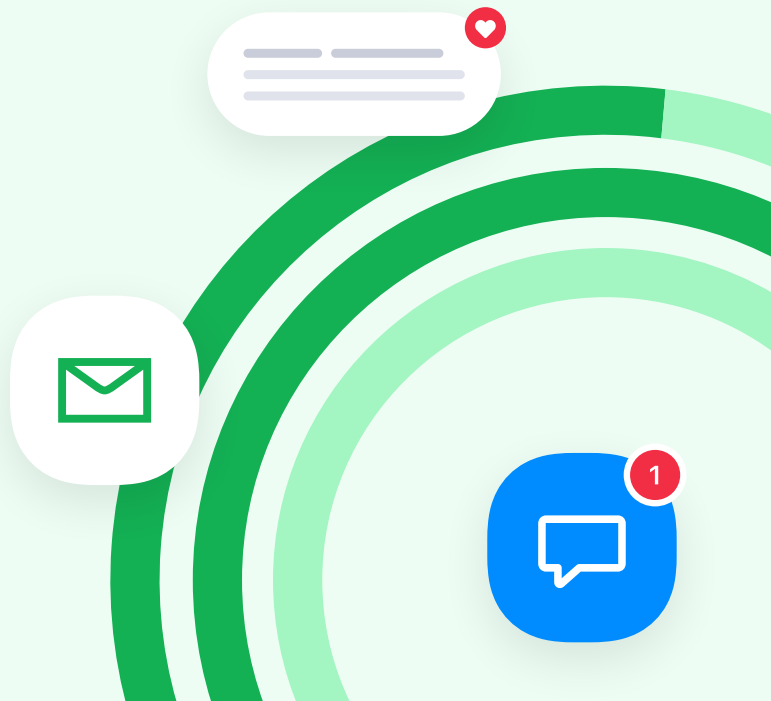


How to Win With Personalization:

30 data-driven strategies for 2023



Introduction

Welcome to 2023, where the digital world is constantly changing, and businesses worldwide are adapting to keep up with rapid tech advancements and ever-shifting consumer behaviors. As Ferris Bueller once said, “Life moves pretty fast, if you don’t stop and long around once in a while you could miss it”.



At the same time, companies are on the lookout for innovative ways to grow sustainably and efficiently through challenging economic headwinds. That’s where personalization comes in – it’s the secret sauce of customer engagement, and it’s what keeps your audience coming back for more.

Now, here’s the kicker – despite the circumstances, businesses are going all-in on personalization. The latest [State of Personalization](#) report by Twilio Segment tells us that nearly 69% of business leaders are upping their personalization game to stay competitive in the market. They know that creating tailor-made experiences for their audience leads to happier, more loyal customers.

One-to-one marketing is no longer exclusive to industry giants; it has become an important strategy for organizations of all sizes. Advances in technology, such as AI and machine learning, have enabled companies to access deeper insights into customer preferences and behaviors, making it easier than ever to deliver highly personalized experiences across all touchpoints.

As you navigate the challenges posed by the macroeconomic climate and strive for sustainable growth, this comprehensive guide will serve as an invaluable resource for optimizing customer engagement and staying ahead in an increasingly competitive market.

How to make personalization happen?

Delivering personalization across the customer journey involves a complex orchestration of data, tools, and organizational alignment. Each industry and use case also requires a different mix of these elements, adding to the challenge.

To help get you started with personalization, we've organized 30 use cases and strategies by three phases of the customer journey—acquisition, real-time activation, and retention. These stages in the marketing lifecycle drive critical business metrics like new user signups, sales revenue, and active users.

Our case studies and strategies show how other companies have successfully improved these phases in their customer journeys and explain how you can do the same.



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Acquisition

Acquisition involves finding prospects and turning them into customers for your business. It's usually the first step in the customer journey that enables all subsequent phases – there's no business without customers.

Personalization plays an essential part in this first stage of the customer journey. It's the difference between irrelevant ads and messages that people ignore versus winning campaigns that bring the right customers to your company and drive growth.

We'll explain how you can personalize ads, emails, and campaigns in the following section, so you can improve your acquisition efforts.

Case Study 1

INDUSTRY

Healthcare

HEADQUARTERS

Paris, France

PRODUCTS

Twilio Engage
Protocols
Connections
Profiles Sync



Sanofi Drives Customer Engagement with Personalization

Challenge

Sanofi, one of the world's largest healthcare companies, needed a real-time, 360-degree view of its healthcare providers (HCPs) to better understand both the online and offline customer journey. With this data, Sanofi hoped to provide more targeted, personalized experiences for HCPs and positively impact patient outcomes.

Solution

Sanofi turned to Twilio Segment to build "golden profiles" of its customers, using [Profiles Sync](#) to combine customer data from multiple sources in their Snowflake data warehouse. With this more complete, relevant view of customers' interests and behaviors, Sanofi was able to create complex, omnichannel marketing campaigns that better educate healthcare providers about new drugs and treatment plans.

Results

Measured by various metrics—more prescriptions written, webinars attended, and sales interactions—Sanofi has seen improvements across the board, thanks to complete customer profiles and the ability to better personalize its campaigns with Twilio Segment.

[**Read the full customer story here >**](#)

“Previously, we would work with our data by moving it, then using it. Now, with Twilio Segment, we can use data while we move it.”

Rick Troiani

Director of Omnichannel Engagement Architecture, [Sanofi](#)



Acquisition Strategy 1

Unify Customers' Online and In-Store Purchases with Reverse ETL

It's easy to use Segment to track your customer's online purchases, as a visitor to your website. But online is not the only place that customers can shop and interact with your brand. It's very likely that customers shopping online will also make a purchase in your store. This matching will create a seamless brand experience for your customers and allows you to further personalize marketing content for your customers.

Unify a customer's online and in-store purchases by integrating data from Segment Reverse ETL with your data warehouse and analytics/email marketing tool. Here's a summary of the steps:


1. **Create a bucket in Google Cloud Storage:** Set up a new bucket and create a folder within it.
2. **Create an External Table in BigQuery from the bucket data:** Set up a new dataset and create a table using the Google Cloud Storage bucket you created.
3. **Set up BigQuery as a source for Reverse ETL:** Create a new service account, grant the necessary roles, and connect BigQuery to your Segment workspace.
4. **Build a model to grab data from the external table:** In your Segment workspace, create a new model using an SQL query to fetch relevant data from the external table. Set up a unique identifier column and configure the sync schedule.
5. **Set up your analytics tool as a destination and map the table data as purchase events:** Connect your preferred analytics tool (e.g. Mixpanel) to Segment, map the columns to the relevant fields, and configure the destination settings.

By following these steps, you can create a seamless brand experience for your customers by attributing both their online and in-store purchases, allowing for better personalization and improved customer relationships.


[Read the step-by-step instructions here >](#)

Add Mapping ×

Select model to sync from

 Retail Purchases ▼

Select action*

 **Track Purchase**
Record purchases in Braze ✓

Cancel

Next

Case Study 2

INDUSTRY

Retail

HEADQUARTERS

CDMX, Mexico

PRODUCTS

Twilio Engage



Domino's Personalized Ad Campaigns with a Single Customer View

Challenge

Domino's customer data captured from interactions across dozens of digital touchpoints was stuck in silos across the organization. Different teams had different information, which prevented personalized campaigns and loyalty programs based on consumer behavior.

Solution

Domino's created a single view of their customers by partnering with Segment. They simplified their data collection process across all digital properties with a single API. Domino's used this setup to launch more relevant cross- and upsell campaigns via personalized offers enabled by [Twilio Engage](#).

Results

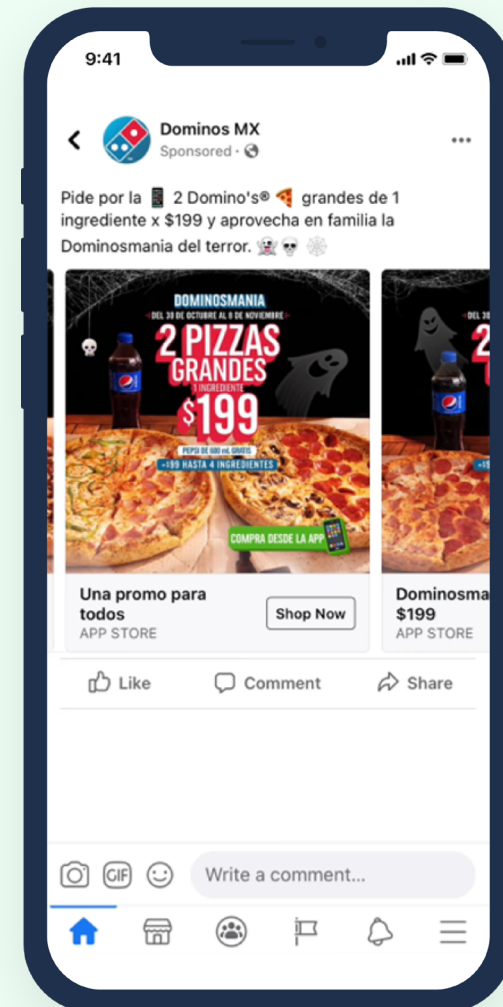
Domino's used Segment to identify eight customer cohorts and created personalized journeys for each based on their behavior. That setup allowed them to tailor their ad campaigns, which decreased their cost per acquisition (CPA) by 65% and increased their return on ad spend (ROAS) by 700%.

[**Read the full customer story here >**](#)

“Having Segment not only helped us do the personalization work we’ve always wanted to do, but we can now improve on the effectiveness of our ad campaigns and create a better feedback loop.”

Christian Rocha Castillo

Deputy Director Ecommerce/Digital Media, [Domino's Pizza](#)



Acquisition Strategy 2

Increase Advertising ROI with Lookalike Audiences and Ad Suppression

You can use data on your existing customers to let advertising platforms find prospects with similar characteristics—lookalike audiences. You can also use this information to exclude misfits with ad suppression. Both of these approaches help increase your advertising efficiency.

When implementing lookalike audiences and ad suppression for your campaigns, avoid these two common mistakes:

1. **Working with out-of-date customer data** by manually uploading CSVs to your advertising platform
2. **Suppressing too many ads**, for example, by excluding existing customers who might want to purchase a different product from you

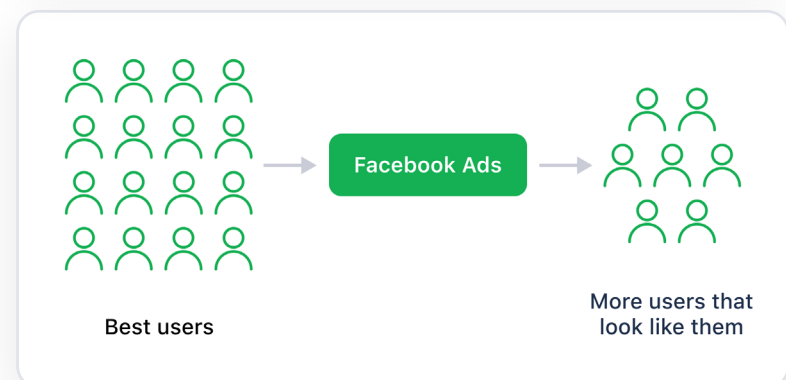
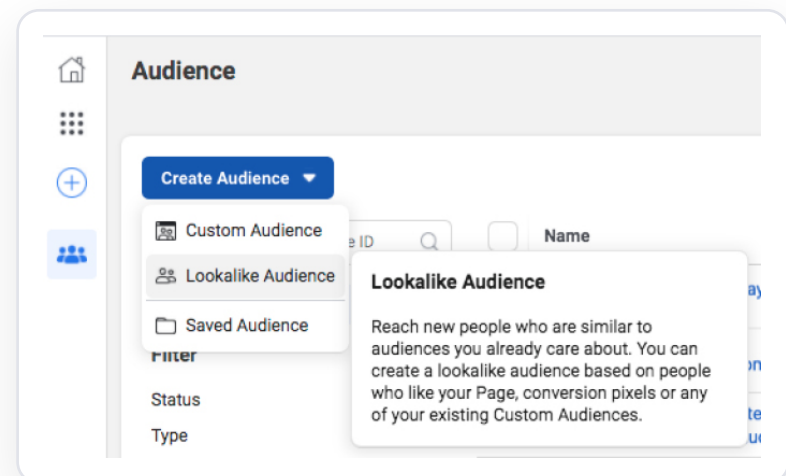
Your ads are always based on real-time customer data when you connect Segment to your advertising platform. You can also use Twilio Engage to create custom audiences for more granular personalization and ad suppression. For example, you can put your big spenders in a separate audience from budget shoppers.

Insights and takeaways

A survey by [Postclick](#) found that among those businesses that apply personalization to their advertising, 42% still use only basic

segmentation techniques. Lookalike audiences and ad suppression can move you past these laggards and increase your advertising ROI and conversation rates.

[Read the step-by-step instructions here >](#)



Case Study 3

INDUSTRY

B2B SaaS and Technology
Consumer Goods and
Services

HEADQUARTERS

Melbourne, Australia

PRODUCTS

Connections
Protocols
Twilio Engage



Vervoe Decreased its Customer Acquisition Using More Personalized Ads

Challenge

Vervoe needed to improve its entire customer journey from acquisition to onboarding. It lacked complete customer data, which made it difficult to understand the customer journey and provide the best experiences to its users.

Solution

Vervoe turned to Twilio Segment to create real-time customer profiles, accessible by all teams across the company. With this data, Vervoe optimized its advertising spend, personalized customer onboarding and improved product features, all based on real-time customer data.

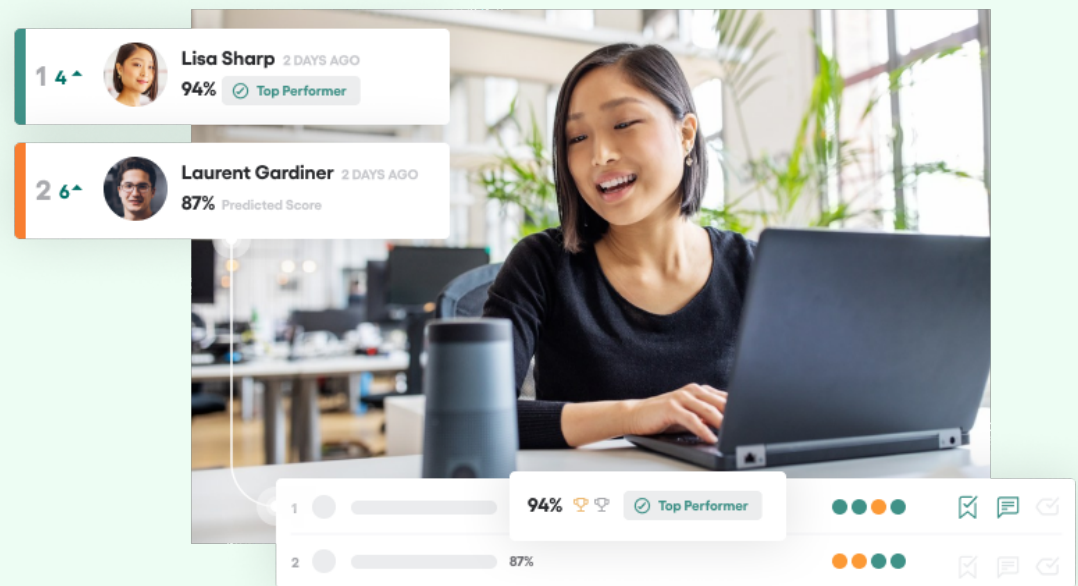
Results

Twilio Engage Audiences allows Vervoe to now suppress unqualified candidates from Google Ads. Since this was rolled out, their team has experienced a 25% reduction in customer acquisition cost (CAC).

[Read the full customer story here >](#)

“We use Segment to understand everything going on with our customers. We are able to understand active user behavior, where usage drop-off occurs and who might be at churn risk. I can’t even begin to imagine how we would have done any of this before Segment.”

Nicole Bowes
Head of Product, [Vervoe](#)



Acquisition Strategy 3

Power Customer Acquisition with a Personalized Affiliate Program

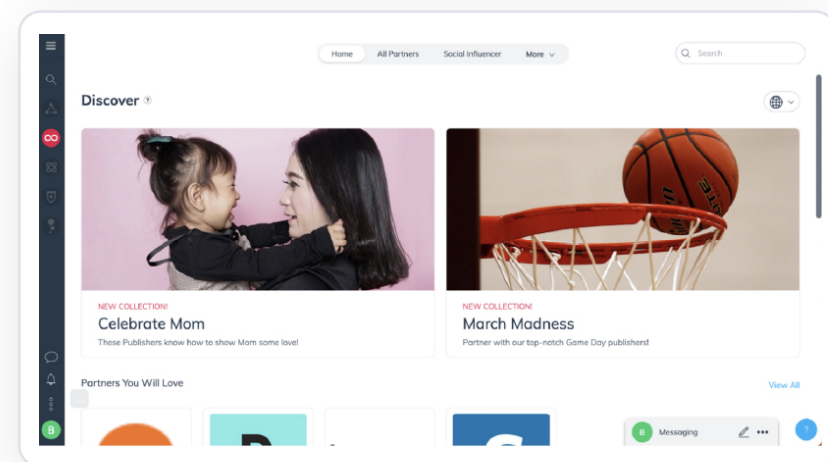
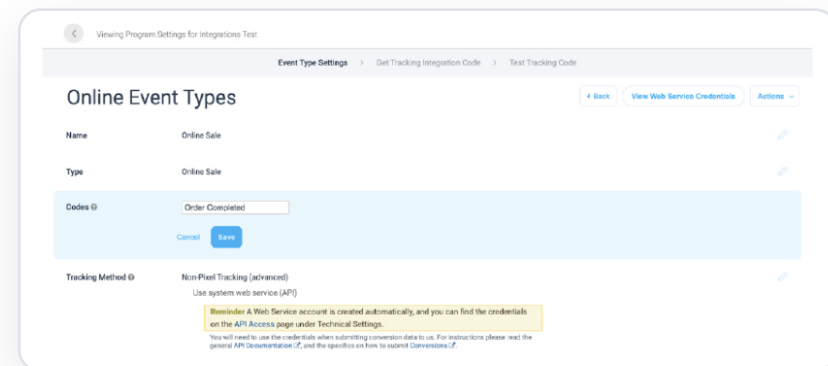
A successful affiliate marketing program relies on personalization, targeting the right audience, and tracking the performance of your partners. With Twilio Segment and [impact.com](#), you can streamline your affiliate marketing efforts and create a more efficient and personalized program.

Follow these steps to set up a personalized affiliate marketing program with Twilio Segment and impact.com:

1. **Configure Segment Calls:** Set up Identify, Track, and Page API calls based on the Segment Spec. Refer to the [Segment documentation](#) for guidance.
2. **Add impact.com as a Destination:** Enable impact.com as a destination in your Segment account. This allows your impact.com program to receive events from Segment. Find the necessary steps [here](#).
3. **Set up Tracking Settings and Event Types:** Follow the general instructions [here](#) to set up tracking settings and event types on impact.com. Create event types for “Online Lead” and “Online Sale” based on the Track calls in Segment.
4. **Discover and Recruit Partners:** Use impact.com’s Discover feature to find and recruit suitable partners, including affiliates, influencers, and publishers.

By following these steps, you’ll be able to launch a personalized affiliate marketing program, efficiently discover and recruit partners, drive customer acquisition, and track performance all in one place.

[Read the step-by-step instructions here >](#)



Case Study 4

INDUSTRY

Consumer Goods and
Services
Retail

HEADQUARTERS

Fort Mill, South Carolina

PRODUCTS

Connections
Twilio Engage

Rugs.com

Rugs.com Personalized Their Messaging to Target the Right Customer

Challenge

Rugs.com did not effectively collect, manage, and activate their own data, let alone data from other brand lines they owned. They spent valuable internal engineering resources standardizing their first-party data for other teams, creating roadblocks for marketing initiatives and preventing growth.

Solution

Rugs.com turned to Segment to seamlessly connect customer data across their brands and send valuable shopper audiences to downstream marketing and ad platforms. Now, Rugs.com can easily create highly differentiated audience segments based on advanced behavioral data directly from the Twilio Segment interface.

The marketing team is also using Segment Journeys to build multi-step, cross-channel campaigns to drive repeat sales and customer lifetime value. For example, after a customer orders a rug of a particular size, Rugs.com now delivers a personalized campaign to encourage them to buy another rug size to complement their collection.

Results

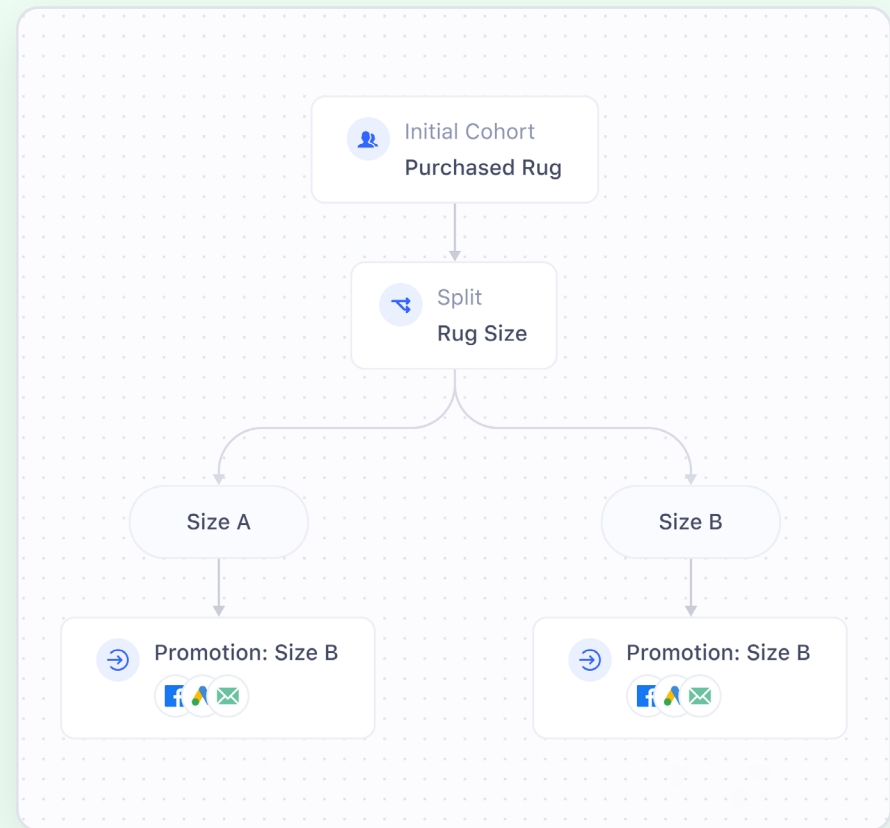
The marketing team can now autonomously build personalized experiences in Twilio Engage rather than wait for engineering resources to support new campaigns. Segment's first-party audience targeting capabilities also directly improved Rug.com's return on ad spend and helped them achieve 400% YoY growth.

[Read the full customer story here >](#)

“The ideal future state is targeting our customers with relevant products, as opposed to generic blasts of news or updates... It’s actually personalizing and customizing their experience wherever they are, and with Segment Journeys, we’re delivering cross-channel engagement like never before.”

Grayson Bagwell

Director of Business Development and eCommerce, [Rugs.com](https://www.rugs.com)



Acquisition Strategy 4

Win Back Churned Users with Pre-Targeting Ads Before Email Campaigns

One of the highest-leverage growth strategies your team can implement is to win back churned users. A technique to revive inactive users is pre-targeting—running ads to inactive users before reaching out to them via email. This way, once they receive your email, they're already re-acquainted with your product. The ads are also an opportunity to restate your value propositions to them.

To accomplish this with Segment, follow these four steps:

1. **Create a list of inactive users.** Set up a Segment audience with customers who haven't engaged with your platform or service in the past 30 days. Segment will keep this audience synchronized in real time as users fall in and out of the 30-day active/inactive window.
2. **Add destinations in Segment.** Add destinations for your advertising platform—for example, Facebook Custom Audiences—and your email marketing tool of choice, like PersistIQ, Mailchimp, or Customer.io. Segment will continuously sync your audience of inactive users with these destinations.
3. **Launch your pre-targeting ads.** Now you can select your inactive users as an audience on your advertising platform and schedule ads to target them. Consider ads that highlight new features of your product, customer testimonials, or your best-performing blog content.

4. **Schedule your revival emails.** Go to the email tool you set up as a destination earlier and schedule the emails you'll send to your inactive users after they've been pre-targeted. For products with a long sales cycle, email a user four to six weeks after pre-targeting has started. For impulse purchases, try two to three weeks.

[Read the step-by-step instructions here >](#)

The screenshot shows the 'Review & Create' interface in Segment. It is divided into two main columns. The left column contains three input fields: 'Audience name' with the value '30 Days Inactive Users Audience', 'Audience key' with the value '30_days_inactive_users_audience', and 'Description (optional)' which is currently empty. The right column displays summary information: 'Audience Size' with an 'Approximation: 8,106', 'Sync Schedule' indicating 'Sync will happen: every hour', 'Upcoming sync: in 2 minutes', and 'Sync duration: 10s'. There is a checked checkbox for 'Compute without enabled destinations'. Under 'Destinations', it states 'No destinations selected'. At the bottom, there is a 'Previous Step' button on the left and a 'Create Audience' button on the right.

Real-Time Activation

Real-time activation consists of personalization strategies executed while a user is actively engaged on your web or app property. Usually, these are personalized recommendations or content delivered based on the customer's preferences and past behaviors.

Most real-time activation happens around customer journey events that directly impact critical business metrics like revenue and churn. Such responses are nearly always personalized because they target individual customers and are triggered in real time by their actions.

We'll show you how to apply this type of personalization in areas like product recommendations and advertising campaigns through the following use cases and strategies.

Case Study 5

INDUSTRY

B2B SaaS and Technology

HEADQUARTERS

San Francisco, California

PRODUCTS

Connections



Dialpad Activates Real-Time Data to Solve Onboarding

Challenge

Dialpad wanted to expand its customer base, run campaigns at scale, and increase its speed to market. It needed a better way to manage data in its multiple backend databases to focus on personalization and add new revenue streams without additional resources.

Solution

Dialpad turned to Twilio Segment to kickstart its ability to onboard users and get customers to value quickly. Twilio Segment's Customer Data Platform (CDP) collects data from across Dialpad's platform and pushes it to downstream tools. The marketing team now tracks customer experiences in real time and focuses their attention on increasing software adoption.

Results

With a customer data platform in place, the Dialpad team has been able to increase conversion rates on paid subscriptions and speed-to-value for customers with real-time data.

[Read the full customer story here >](#)

“We had disparate systems storing all this data and we were able to pull those traits into Segment and actually leverage them. We’re starting to really see the benefit, and I think that’s been a relatively understated accomplishment.”

Andrew Gai

Senior Director of Growth Marketing at [Dialpad](#)



Activation Strategy 5

Personalize Customer Communications Using Real-Time Location Data

Location data, when appropriately used, is essential for delivering personalization that can feel magical and helpful. You can now put together such experiences quickly using Segment, [Radar](#) (a location data infrastructure platform), and [Customer.io](#) (a marketing automation software).

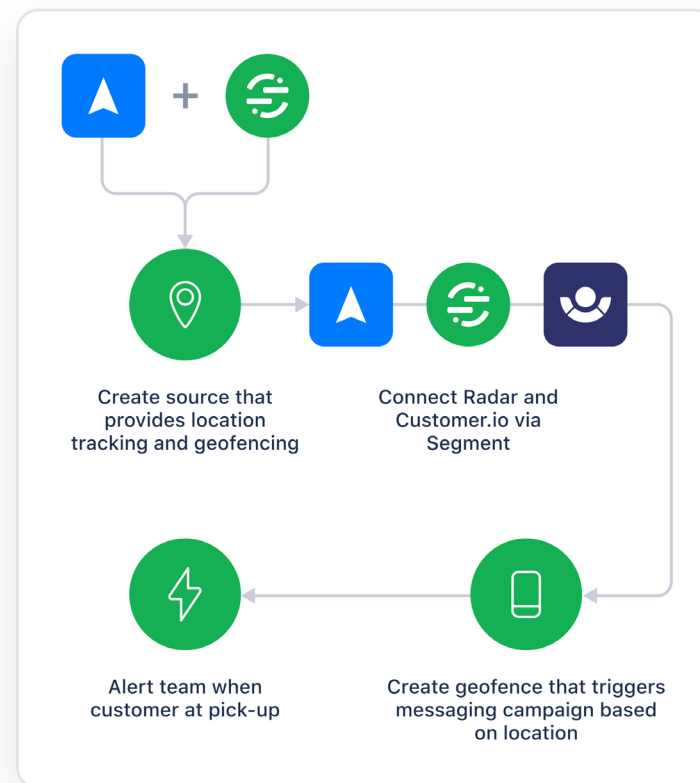
Once you have accounts created with these three services and have prepared your customer data in Segment, follow these three steps:

1. **Set up a geofence in Radar.** Radar offers geofencing, trip tracking, and a location API platform. Create a geofence—for example, two miles around your physical store—and then use Radar's API to calculate metrics like distance and ETAs, which can be helpful for both your customers and your staff.
2. **Connect Customer.io to Radar via Segment.** Once you've created a geofenced area in Radar, you can send an event to Segment when a customer enters your designated zone. From Segment, you can pass this information on to Customer.io to trigger a personalized message or message sequence for that customer.
3. **Create a location-triggered campaign in Customer.io.** Use Customer.io's visual campaign builder to set up one or more messages that will go out to your customer based on that customer entering your geofence area. This could be to help them with directions or let them know which parking spots are available.

Insights and takeaways

RetailMeNot saw a 19% uplift in store-entry events by implementing contextual messages based on location. Offering such an experience has become relatively easy thanks to the seamless integrations between Segment, Radar, and Customer.io.

[Read the step-by-step instructions here >](#)



Case Study 6

INDUSTRY

Retail

HEADQUARTERS

Bangkok, Thailand

PRODUCTS

Connections
Twilio Engage



Pomelo Personalized Recommendations at Scale

Challenge

With nearly 8,000 different items on the Pomelo site, new visitors struggled to discover products and couldn't receive relevant recommendations from Pomelo's legacy algorithm.

Solution

Pomelo's small team had limited engineering resources in-house, so they looked for external solutions to deliver scalable one-to-one personalization. They coupled Segment's Customer Data Platform with Amazon Personalize, Amazon's machine learning service for real-time personalization.

Results

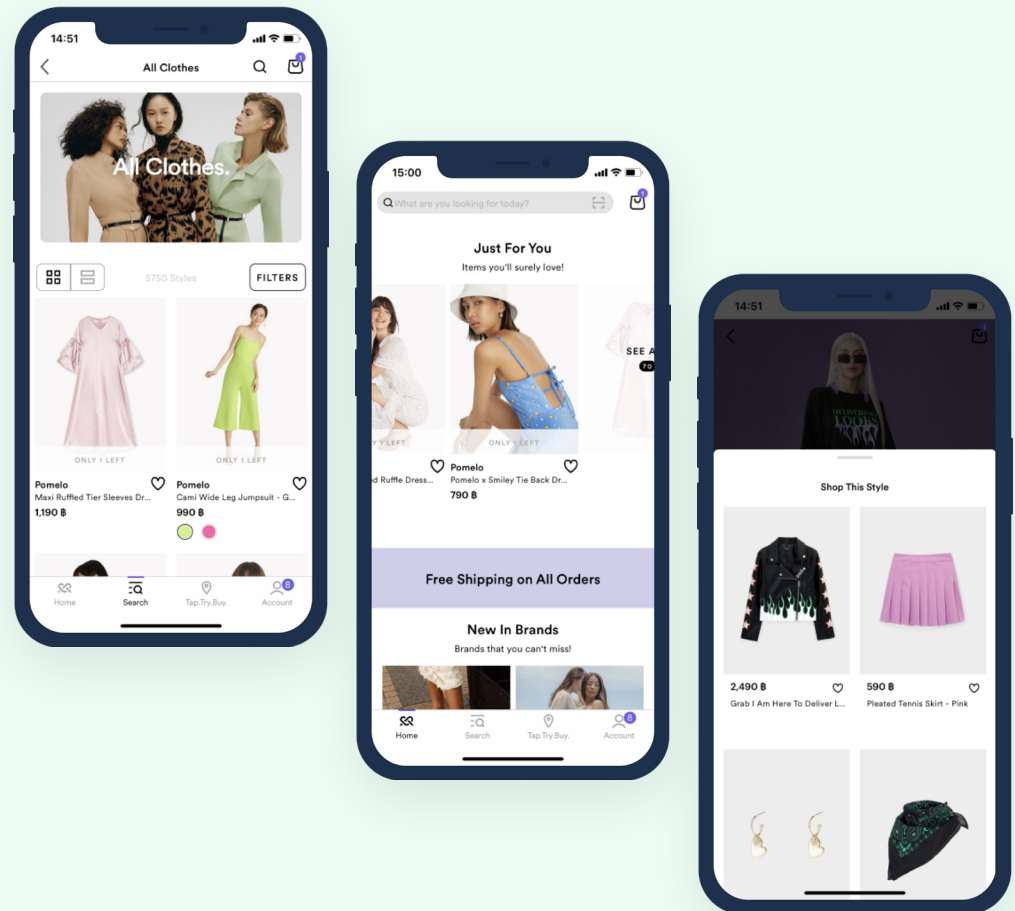
Pomelo's new recommendation engine is so fast, customers can see recommendations changing based on their behavior during a single session. This improvement surfaced in the business metrics: revenue is up 15%, product engagement by 50%, and Segment and Amazon Personalize-fueled recommendations now generate 60% of all product clicks.

[Read the full customer story here >](#)

“We went from a system of batched, general recommendations at a country level to a system of one-to-one recommendations based on your actions. We’ve seen a massive improvement in not only revenue generated, but also customer loyalty.”

Adam Kirk

AVP, Product Management, [Pomelo Fashion](#)



Activation Strategy 6

How to Implement Segment and Amazon Personalize

To create real-time, personalized interactions with customers, companies need machine learning (ML) to build sophisticated algorithms that can deliver personalization at scale.

Traditionally, ML-based personalization required complex data infrastructure and large in-house data science teams. Segment and Amazon Personalize can now deliver these experiences without such resources. With Amazon Personalize and Segment, you can power the models Amazon has perfected over the years with your Segment data to create accurate, personalized content at scale. With a few clicks, you can send product recommendations into emails in Iterable, push notifications from Braze, or embed the recommendations directly into your website or app experience. There are three steps to get started with Segment and Amazon Personalize:

1. **Prepare historical data (optional):** Prepare your historical customer data and upload it to Segment along with your product or media catalog. (Alternatively, you can launch Personalize with an empty data set and train it with new event data.)
2. **Create a Personalize solution:** Select a specific personalization algorithm or let the AutoML feature determine the best algorithm for you based on the data you provide.

3. **Get recommendations:** Use the Personalize API to stream customer data back into Segment to activate recommendations for each user on your channels.

Insights and takeaways

56% of consumers say they will become repeat buyers after a personalized shopping experience with a retailer. You can provide your customers with such personalized, ML-powered recommendations across your apps, emails, live chats, and sales and support channels with Segment and Amazon Personalize. Recommendations can include articles, products, videos, or music and can be delivered in real time to drive conversions and increase engagement.

[Read the step-by-step instructions here >](#)



Case Study 7

INDUSTRY

Retail

HEADQUARTERS

Copenhagen, Denmark

PRODUCTS

Connections
Twilio Engage



The Vintage Bar Personalized Real-Time Purchase Recommendations

Challenge

The Vintage Bar wanted to run real-time personalization experiments with their customer data while scaling its business rapidly. To accomplish this, they needed a flexible tech stack that allowed them to switch quickly to another software solution without losing time or historical data if one wasn't performing.

Solution

The Vintage Bar chose Segment as their Customer Data Platform (CDP) and put it at the heart of their operations. They now use Segment to enable all their onsite, real-time personalization, like tailored search results and product recommendation pages.

Results

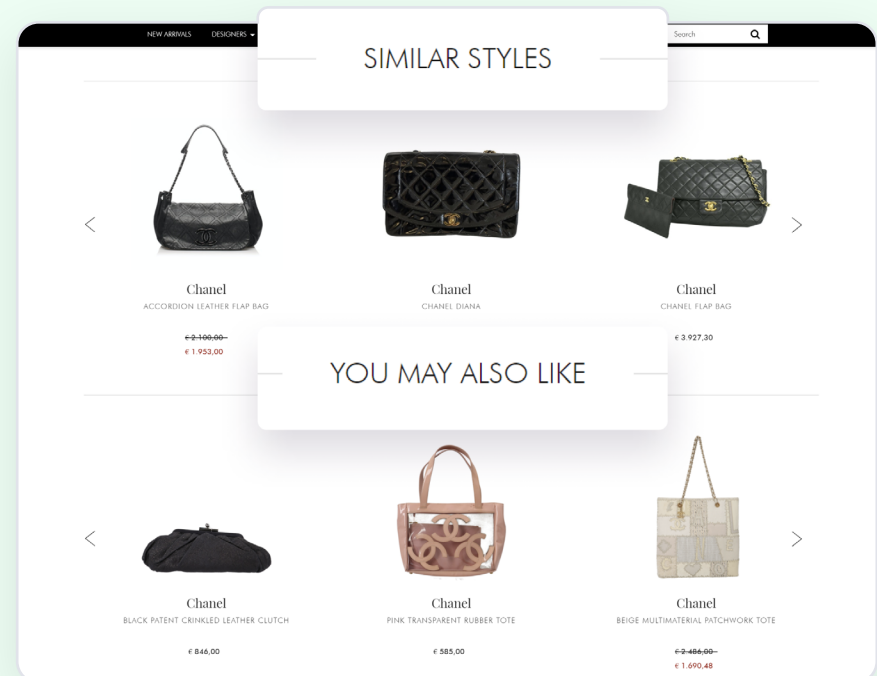
Personalized listings based on what the user will most likely purchase increased The Vintage Bar's overall site conversion rate by 12%. Order conversions also went up 34% through personalized recommendations on product detail pages.

[Read the full customer story here >](#)

“Real-time personalization is important to us because of how heavily we’ve scaled our product catalog. Not only does on-site personalization help that session’s engagement and conversion, but it keeps our visitors coming back.”

Nikolaj Toxværd

Chief Marketing Officer, [The Vintage Bar](#)



Activation Strategy 7

Personalize eCommerce Site Search to Increase Conversion Rates

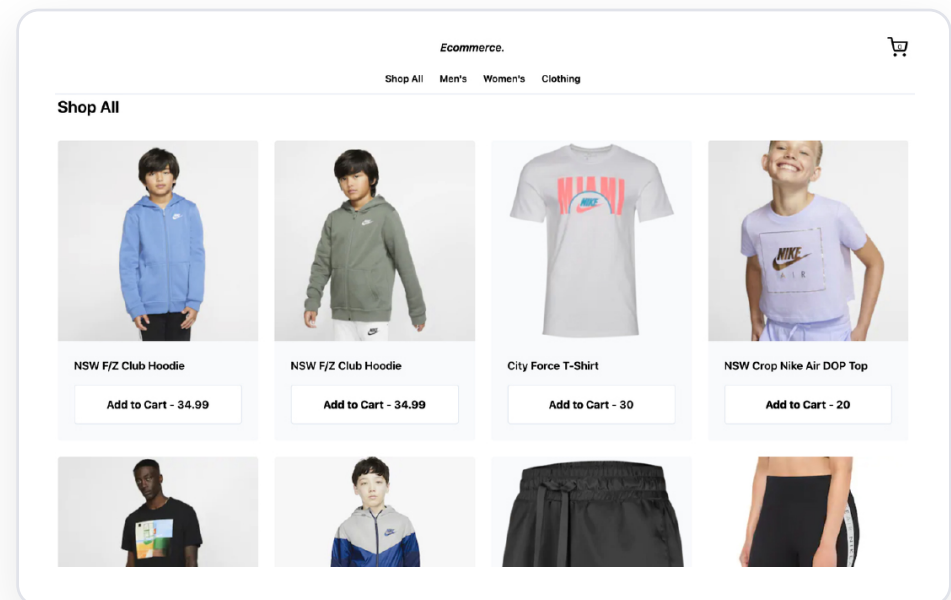
A site that's not personalized to a customer's needs leads to a poor customer experience and low conversion rates. You can personalize the user experience on your eCommerce site using Twilio Engage and [Algolia](#) – a site search and discovery plug-in.

Apply these four steps to personalize your site search experience based on users' behavior:

1. **Identify a use case you want to personalize.** Some ideas—boost the most frequently viewed brands in your search results; boost items based on gender in search or the product category browser; boost high-value items for high-value buyers in search or the product category browser.
2. **Implement tracking events to understand user behavior.** Set up your site as a source in Segment and implement our [default eCommerce events](#) to track customer behavior on your site.
3. **Enrich user profiles with traits in Engage.** Select a trait that matches the use case you've picked under step 1 from the eCommerce events you've started tracking. You could, for example, add a trait on which brand a customer has viewed most frequently.
4. **Connect Segment and Algolia to personalize search results.** Link Segment and Algolia so you can send the information from the previous step to Algolia's search listing function. You can

personalize the search results in real time using the traits you've defined, like prioritizing a customer's most-viewed brand in the results.

[Read the step-by-step instructions here >](#)



Case Study 8

INDUSTRY

B2B SaaS and Technology

HEADQUARTERS

Copenhagen, Denmark

PRODUCTS

Connections
Functions
Twilio Engage



Veo Gains a Deeper Understanding of its Customers

Challenge

Veo was struggling to deliver more personalized experiences for customers because the team simply didn't have enough insight into customer needs and preferences. It was challenging to understand user behavior across its product platforms – iOS app, Android app and web app. Even on its website, Veo's ability to track event data was very limited.

Solution

With Twilio Segment offering unprecedented visibility into customer usage and behavior, Veo is now taking a more sophisticated approach with its customer personalization. For instance, the marketing team is able to use customer data to identify customers that are most likely to buy an additional camera for their clubs. They can also spot when sports clubs are nearing storage capacity, triggering an automated email with specific offers to purchase an additional camera.

Results

By implementing Twilio Segment, Veo has been able to generate a much richer understanding of its customers and generate a 45% upswing in customer engagement (open rates/CTR).

[Read the full customer story here >](#)

“Twilio Segment is enabling us to continually improve our products and to communicate more effectively with customers. But more than this, Twilio Segment is generating business value, as we’re now in a far better position to retain customers and upsell new products and services based on their behaviors and interests.”

Bjarke Wheatley Enkelund

Data analyst, [Veo Technologies](#)



Activation Strategy 8

Use Predictive Purchase Behavior to Increase Campaign ROI

The foundation for building personalized experiences is based on having access to reliable and clean first-party data. With access to this data, you can power machine learning models to predict relevant content recommendations, user interactions, or even help forecast revenue.

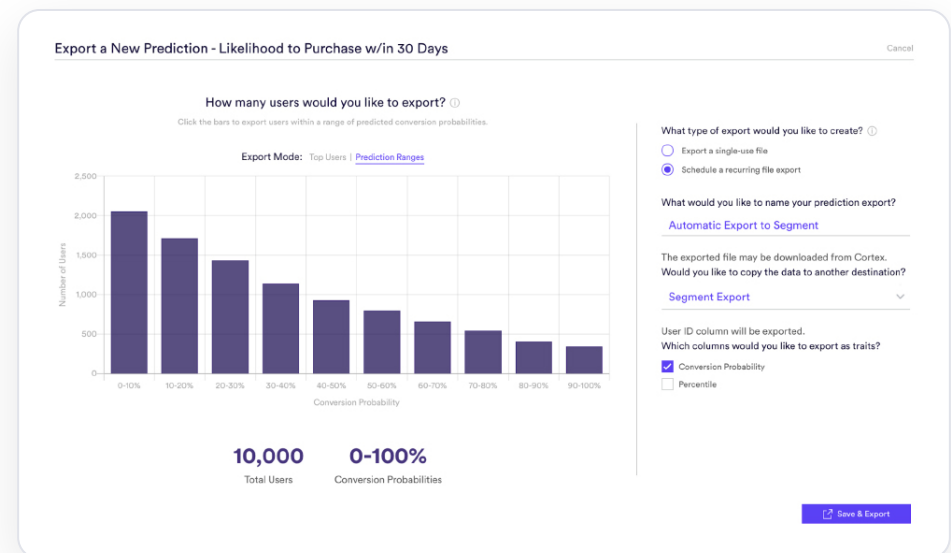
Predict the likelihood of users purchasing an item or subscribing to a product within 30 days and optimize marketing campaigns using [Vidora](#) and Segment. Here are the essential steps:

1. **Capture user behavioral events and traits:** Track user actions (e.g., screen views, button clicks) using the Segment platform to gather historical behavioral data.
2. **Set up the Vidora destination in Segment:** Copy your Vidora Cortex API key and enable the Vidora destination in Segment.
3. **Predict the likelihood of purchase/subscription:** Using Vidora Cortex's no-code platform, create a Future Events Pipeline to predict the likelihood of a user action (e.g., Purchase, Subscribe) within the next 30 days.
4. **Export predictions back to Segment:** Set up Segment as an export destination in Vidora Cortex to send user predictions back to Segment, ensuring up-to-date data.

5. **Activate predictions in your favorite tools:** Connect your Segment source receiving prediction data to any of their 300+ destinations to achieve specific use cases, such as targeted ads or personalized emails.

By following these steps, you can use predictive purchase behavior to increase campaign ROI, delivering the right offer at the right time to your customers.

[Read the step-by-step instructions here >](#)



Retention

Retention is the art of keeping your current customers and generating more business from them. Earlier parts of your funnel need to work well before you can consider retaining customers. But most companies focus too much on acquiring new customers at the expense of keeping existing ones.

Customer acquisition is costly—in both time and money—because you need to find prospects, win their trust, and convince them to buy from you. Existing customers have already passed through these steps, so the hurdle to sell to them again is much lower. You also know more about them, so it's easier to provide them with relevant recommendations and offers.

The following use cases and strategies help shift focus to retention as they're all about doing more for—and generating more revenue from—your existing customers with personalization.

Case Study 9

INDUSTRY

Healthcare

HEADQUARTERS

Dublin, Ireland

PRODUCTS

Journeys
Protocols
Connections
Twilio Engage
rETL



Allergan Personalized Their Loyalty Program

Challenge

Facing more competition, Allergan knew it needed to build better direct relationships with patients to continue to grow. However, in order to do that, the team needed to rebuild its technology stack, try new messaging tools, and create a centralized source of customer data.

Solution

Allergan rerouted customer data from all their sources—loyalty program, branded and non-branded websites, digital and social ads—through Segment. The marketing team used this as a “golden record” of personas with no need to write SQL to create custom audiences and deploy personalized campaigns.

Results

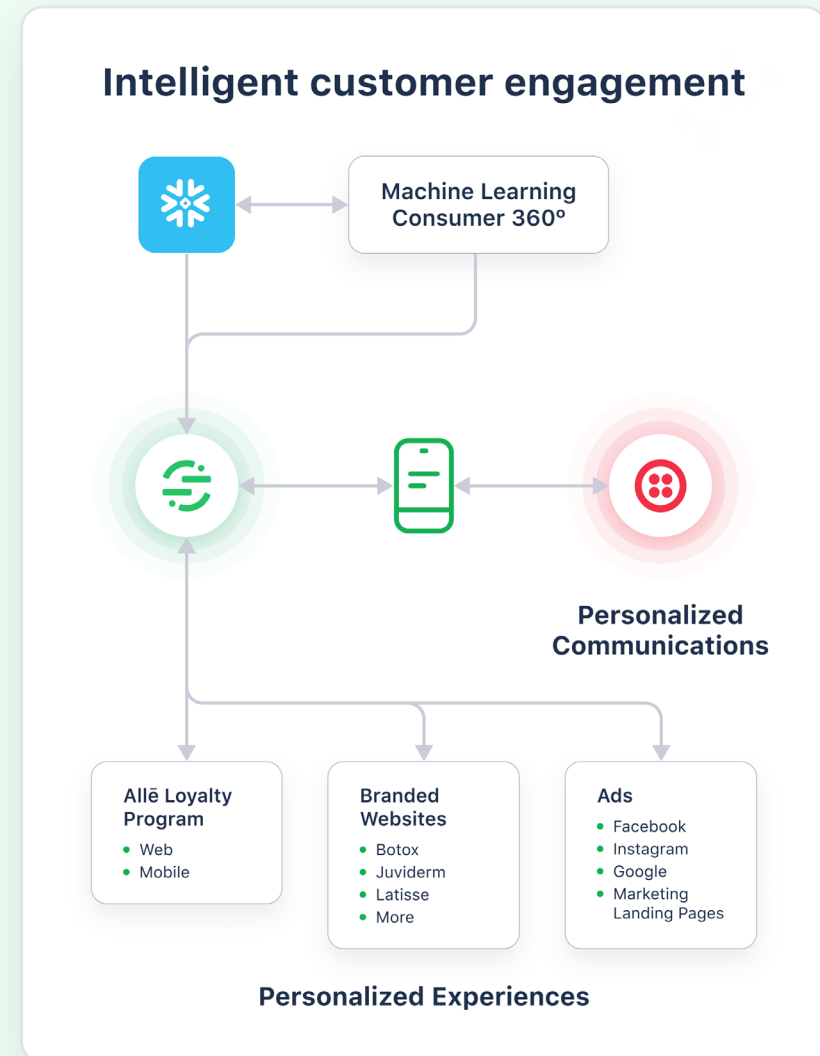
Since turning their attention to consumers by using Segment, Allergan has added over 1 million customers to their loyalty program, generated \$250M+ in revenue for their partners, and sold 150k Botox gift cards.

[Read the full customer story here >](#)

“Since we turned our attention to consumers, we have over 1 million more loyalty users, and we’ve generated about \$250 million in provider revenue. That’s all attributed to the personalization that Segment made available to us.”

Tory Brady

Associate Vice President, Product, Engineering & Data,
[Allergan Data Labs](#)



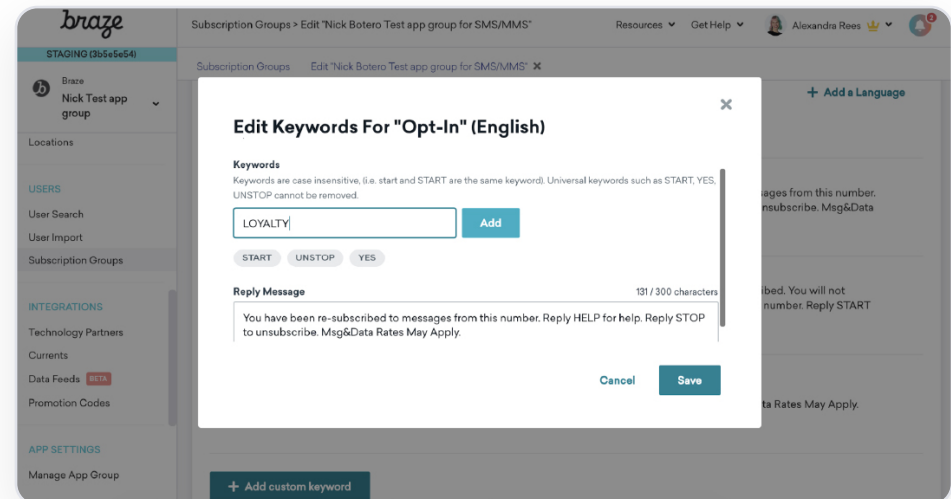
Retention Strategy 9

Build a Loyalty Program for High-Value Customers Through SMS and Email

SMS is a powerful channel for any loyalty program because of its global reach, two-way interactions, and incredible (95+%!) open rates. You can use Twilio Engage to create an audience of high potential lifetime value (LTV) customers. You can then invite them to join an SMS-powered loyalty program using a customer engagement platform like Braze. Follow these steps to implement such a program:

1. **Track customer actions.** Add Segment event tracking to your website or mobile app so you can capture customer data, like their order history and LTV.
2. **Create an audience in Segment.** Set up an audience of high LTV customers in Twilio Engage based on the events you've started tracking. Pass this information on to Braze by adding it as a destination in Segment.
3. **Define a custom SMS keyword.** In Braze, add an SMS opt-in keyword customers will use to confirm they've joined your loyalty program, for example, "LOYALTY."
4. **Build and launch your campaign.** Use the Canvas Campaign feature in Braze to create a series of messages. First, send an email to invite customers to the loyalty program, followed by an SMS with an exclusive offer to confirm their participation using the keyword you've configured.

[Read the step-by-step instructions here >](#)



Case Study 10

INDUSTRY

Retail

HEADQUARTERS

NYC, New York

PRODUCTS

Connections
Twilio Engage

BONOBOS

Bonobos Personalized In-Store Shopping Through Online Ads

Challenge

Bonobos' 48 Guideshop locations let people “try before they buy” through personal appointments with “Guides” who find the right items with the right fit for customers. The retailer needed to know whether Facebook Ads that encouraged customers to book such personalized appointments converted to sales.

Solution

Bonobos used Segment to identify whether a customer purchased an item online or during an in-store visit. Then, the Bonobos team analyzed the in-store sales to learn how many purchases resulted from people seeing the Facebook campaign. The Facebook point-of-sale integration with Segment also allowed Bonobos to optimize its ads to attract more people to Guideshop locations.

Results

Bonobos increased online and offline purchases by 3X –versus a control group–by using Facebook carousel ads powered by Twilio Segment.

[Read the full customer story here >](#)

“Although Bonobos was born online, our Guideshop locations are an important touch-point to our customers’ shopping experience because they serve as an opportunity to experience our brand in real life.”

Micky Onvural
Co-President, Bonobos



Retention Strategy 10

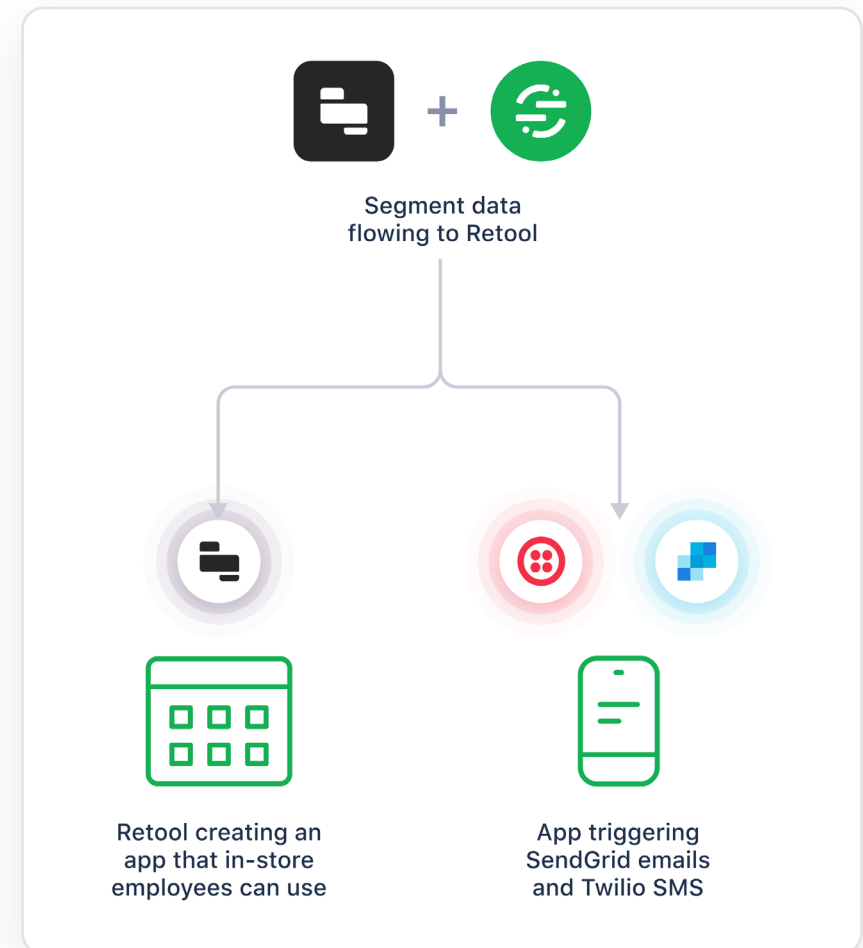
Personalize the In-Store Experience with an App for Your Sales Reps

Retailers need to ensure every online and in-store experience builds on the last through a customer-first instead of a channel-first approach. Your sales reps on the ground are essential for delivering such an experience. We'll explain how you can quickly build a mobile app for them that shows a customer's online purchase history and can generate loyalty coupons.

In the following steps, we'll use Twilio Segment, [SendGrid](#), and [Retool](#)—a leading low-code app builder—to create our mobile app:

1. **Capture user events and traits in Segment.** Use Segment to capture as many eCommerce events as possible, like products viewed, products purchased, and canceled orders.
2. **Set up SendGrid for email.** Configure SendGrid so the store rep can send a loyalty coupon or product recommendation by email from the mobile app to the customer who's picking up in-store.
3. **Activate Twilio for SMS.** Do the same with Twilio for SMS. Then use Twilio to send the loyalty coupon or product recommendation if the customer prefers SMS.
4. **Connect Retool and deploy the app.** Select the [Twilio-Segment app template](#) in Retool, connect Segment, SendGrid, and Twilio, and you're ready to deploy your app to your in-store sales reps.

[Read the step-by-step instructions here >](#)



Case Study 11

INDUSTRY

Financial Services and
Insurance
B2B SaaS and Technology

HEADQUARTERS

Nicosia, Cyprus

PRODUCTS

Functions
Connections
Twilio Engage



Skilling Personalizes to Increase Customer Retention

Challenge

In order to better serve its customers and deliver on customer retention goals, Skilling needed to integrate its customer data across a siloed and complex tech stack and push data through to downstream marketing tools, without having to lean on internal development resources.

Solution

Skilling turned to Segment to centralize and standardize its data across all of its channels. In doing so, it was able to:

- Create a single, unified view of the customer, based on accurate, high quality and compliant data
- Enable marketing teams to execute personalized marketing campaigns, without developer input
- Generate game-changing business intelligence which is now informing strategy and the introduction of new financial instruments

Results

Because Segment is integrated into Skilling's trading platform, the company now has access to a wealth of high value, behavioral data. For instance, it's able to analyze customer churn to identify signals and potential reasons for customers who are no longer engaging with the platform. This has led to a 2% increase in customer retention in key markets.

[**Read the full customer story here >**](#)

“Segment is giving us the confidence to take our marketing in new directions and embrace new tools. Our campaigns have matured hugely over the last 18 months but we still feel that there is so much more we can do now that we have access to trusted, real-time data. This really is just the start of a really exciting journey with Segment.”

Andrew Haigh
CTO, [Skilling](#)



Retention Strategy 11

Engage New Signups with a Personalized Welcome Email

Prospects are more likely to turn into loyal customers if they perform a valuable action early in their journey. Automated and personalized welcome emails can encourage customers to perform such actions by setting new users up for success or moving them to your next funnel stage. Through the following steps, we'll explain how you can use Segment and [Customer.io](#) to create such a personalized welcome email for your new users:

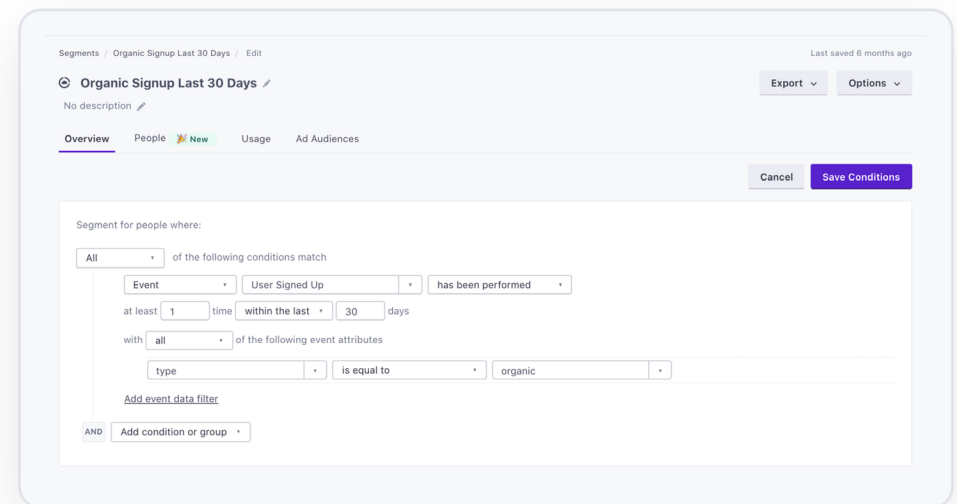
1. **Configure Segment.** Create an audience for new signups using Twilio Engage, which includes specific traits, like a customer's profession or product category preference. Add Customer.io as a destination where you'll send this information.
2. **Write your welcome email.** Determine when exactly you want to send your welcome email—on account creation or after first using your product's main feature—and then write relevant copy for it in Customer.io's editor. Use the traits you included to personalize some elements of your email's content. Also, make sure to add a follow-up action, for example, by linking to a blog post or the next step in your funnel.
3. **Select your audience and time window.** In Customer.io, select the new user audience coming from Segment. To avoid sending the email immediately—which can feel pushy—choose a “time delay” of your preference, ideally a non-standard interval, so it feels organic, like 43 minutes.

4. **Send, test, and measure.** Confirm to start sending these emails in Customer.io, then monitor their performance over time. Pay attention to conversions—how many people take the follow-up action you included—not just the open and click-through rates.

Insights and takeaways

Email is still an indispensable communication channel for consumers and companies. [Research by Drift](#) showed that 67% of buyers used email when interacting with B2B companies.

[Read the step-by-step instructions here >](#)



Case Study 12

INDUSTRY

Consumer Goods and Services

HEADQUARTERS

St. Louis, Missouri

PRODUCTS

Connections
Twilio Engage



Schnucks Personalized the Online and Offline Customer Journey

Challenge

Siloed data sources handicapped the Schnucks' teams in their marketing efforts. It could take between two to three working days to develop a single campaign and required valuable resources to standardize the necessary customer data. Personalization was limited, and Schnucks could only customize communications through manual lookups based on transaction data.

Solution

Schnucks implemented Segment at the core of their long-term data strategy. Segment connected and standardized data across Schnucks' different tools and merged offline and online actions to give a complete picture of the customer journey. Segment then automatically cleaned and sent that data to downstream platforms, empowering teams with more effective and automated personalization capabilities.

Results

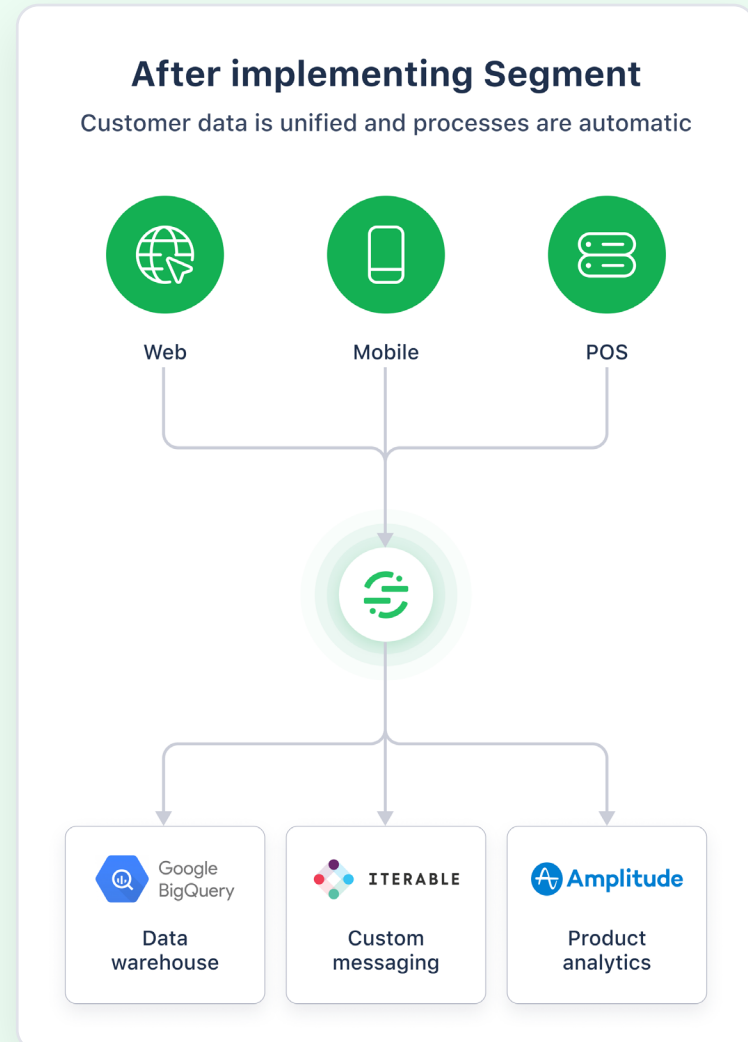
Schnucks increased the number of active personalized campaigns by 200% and reduced manual work for developers and marketers by over three hours per week.

[Read the full customer story here >](#)

“Our goal is to match the experiences our customers know and love from shopping at our stores into our online shopping journey... and Segment is at the core of that process.”

Ann Ehnert

Manager of CRM & Loyalty Marketing, Schnucks Markets



Retention Strategy 12

Improve Product and Retention Rates with Targeted Push Notifications

You can increase user engagement with a personalized push notification that raises awareness for a new product feature. We'll show how to use Segment and Braze—a marketing automation tool—to send push notifications to re-engage dormant users.

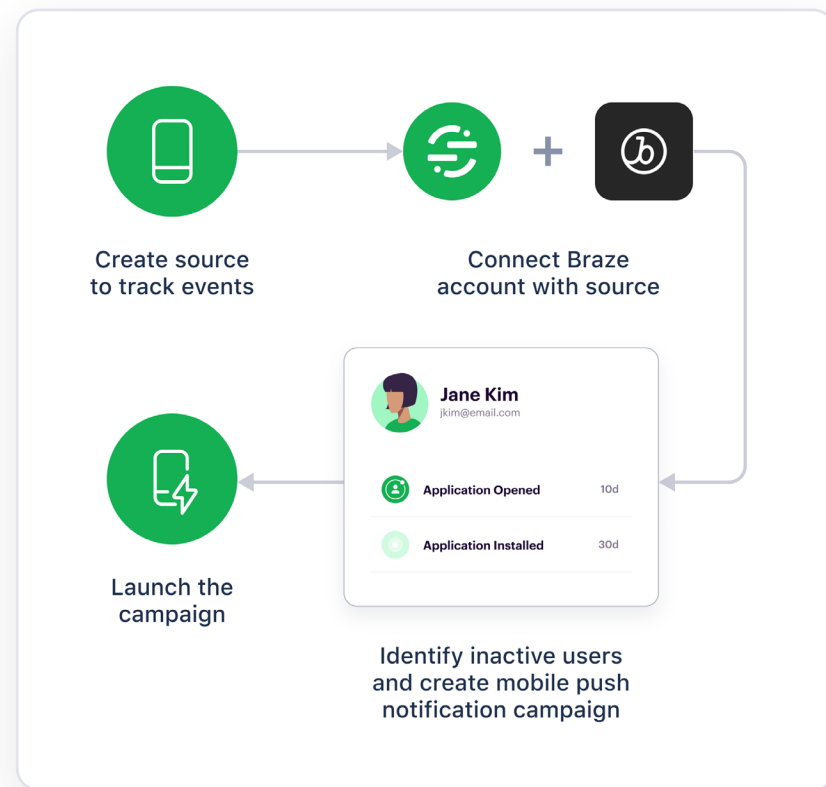
Follow these steps to implement this strategy:

1. **Set up data tracking in your app.** Connect your app as a source in Segment, then implement tracking events using Segment's Android or iOS SDKs to understand what actions users perform in your app.
2. **Create an audience.** Create an audience of inactive users with Twilio Engage based on the data you've started tracking. Configure Braze as a destination in Segment to make this audience available for further use there.
3. **Design a push notification campaign with Braze.** Select the audience you've set up with Twilio Engage and go to Braze's Campaign page to configure your campaign and compose your notification message.
4. **Schedule and monitor your campaign.** Confirm all the relevant details of your campaign one more time, then launch it. Braze allows you to review statistics for the number of messages sent, delivered, bounced, opened, and directly opened while your campaign is active.

Insights and takeaways

Keep in mind these findings from YouGov on notification frequency tolerance when you design your push notification flows: “19% of American users say it’s appropriate to see promotions a few times per week, 18% say once a week and 17% say less often than that”.

[Read the step-by-step instructions here >](#)



Case Study 13

INDUSTRY

Real Estate

HEADQUARTERS

NYC, New York

PRODUCTS

Connections

Protocols

Functions

Twilio Engage

Orchard

Orchard Reactives More Customers with Personalization

Challenge

Real estate company Orchard was seeking a better way to unify data across all platforms to power more customized touchpoints to its customers. To reach its goal of scaling into new markets, Orchard knew it would need to enable every team within its organization to deliver a fantastic customer experience with clean, accurate data.

Solution

To keep up with the fast-moving real estate environment, Orchard turned to Twilio Segment to centralize and connect its data, form a unified customer view, and launch personalized marketing campaigns around specific offers and services. With a complete view of the customer, every team across the organization is empowered to use data to better engage its customers and increase activation.

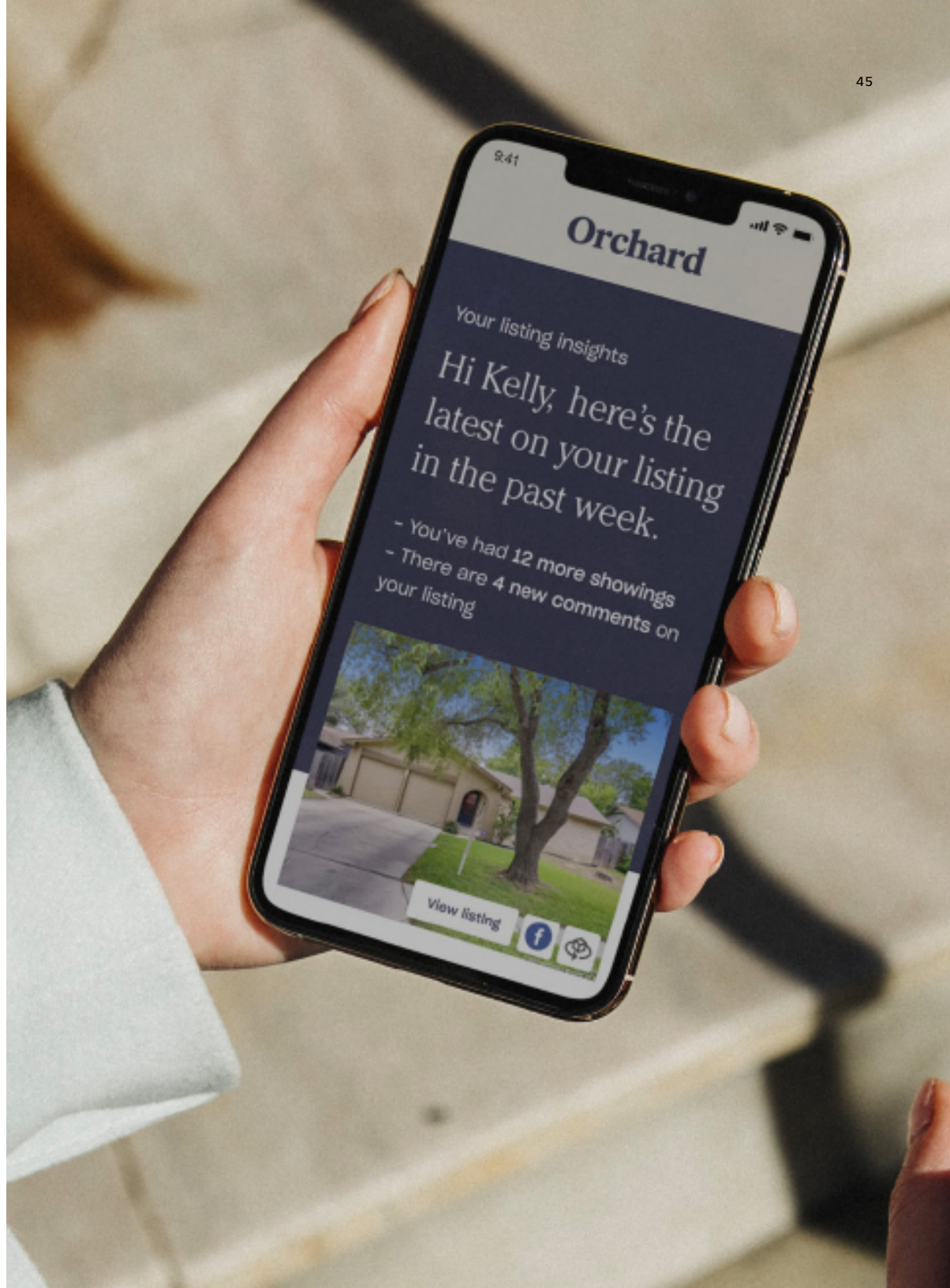
Results

With Twilio Segment, Orchard's cross-functional teams can better activate data to optimize marketing campaigns using more targeted, personalized messaging. This has resulted in reduced reliance on engineering support and a 10% increase in reactivated customers.

[Read the full customer story here >](#)

“The biggest impact Segment has provided is improved efficiency. Once our data stack was in place we were able to optimize marketing campaigns much faster than we could before.”

Taylor Cronk
CRM Lead at [Orchard](#)



Retention Strategy 13

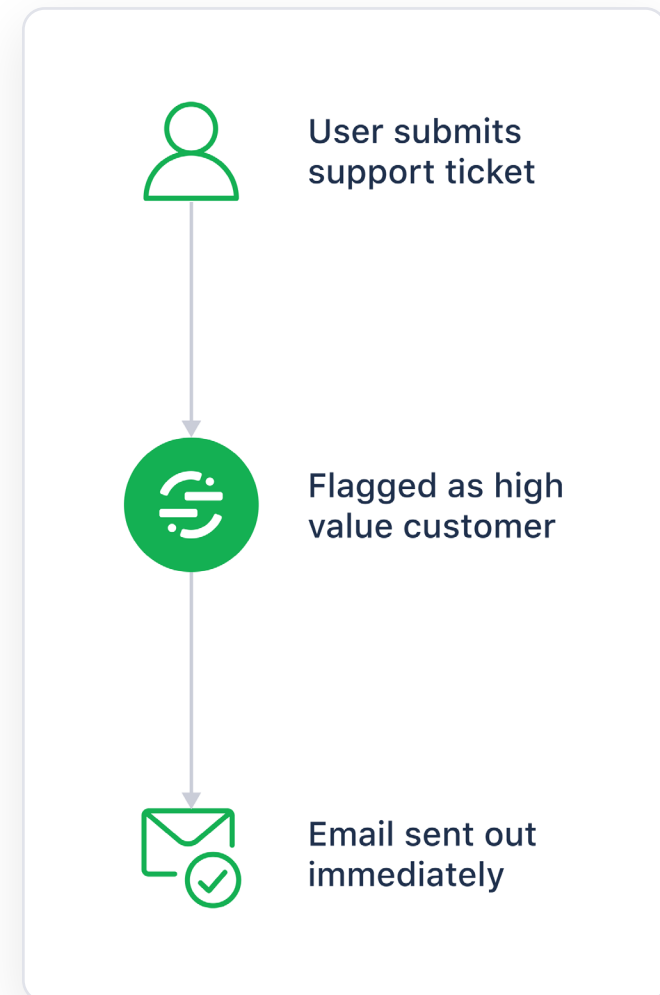
Identify and Prioritize High-Value Support Tickets

One of the most common ways to prioritize your support queue is by customers' pricing plans. Ensure you meet your company's SLAs (Service Level Agreements) by automatically moving high-value users up in line.

Follow these four steps to set up ticket prioritization:

1. **Connect your support ticketing system to Segment.** You'll need to connect your support software tool to Segment so that you can cross-check a support request's sender with your customer information.
2. **Add customer details to your tickets.** Configure an SQL trait in Segment that pulls customer details from your database and adds the customer's pricing plan to the ticket.
3. **Send the updated ticket back to your support tool.** Set up your support tool as a destination in Segment so that you can send back the updated ticket with the customer's pricing plan.
4. **Set up a prioritization rule.** Create a prioritization rule in your support software that moves customers with a higher pricing plan to the top of the queue.

[Read the step-by-step instructions here >](#)



Case Study 14

INDUSTRY

Consumer Goods and
Services

HEADQUARTERS

NYC, New York

PRODUCTS

Connections



Daily Harvest Personalized 1:1 Customer Experiences

Challenge

Daily Harvest had their customer data stored across two locations—Google Analytics and a data lake—which made the data difficult to consolidate and access in real time. Because the data wasn't consolidated, they had a fragmented view of their customers, which meant they couldn't accurately personalize their users' experience, marketing communications, or recipe development.

Solution

Daily Harvest needed to break down their data silos and create a single source of truth for all teams. Segment offered the fastest time to value, allowing Daily Harvest's engineers to centralize customer data and connect it to hundreds of tools with just a few clicks.

Results

Daily Harvest can now collect customer feedback across all touchpoints quickly and co-create clean food with their community in fast, iterative cycles. Segment also provided a more efficient way to query email data, enabling more precisely targeted communications based on individual customer interest.

[Read the full customer story here >](#)

“We have active conversations with our customers to understand who we’re talking to, how we should communicate with them, what their preferences are, and then continuously learn from their behavior across all our touchpoints.”

James Riso

VP of Insights and Analytics, [Daily Harvest](#)



Retention Strategy 14

Boost Conversion Rates with Cross-Channel Messaging Campaigns

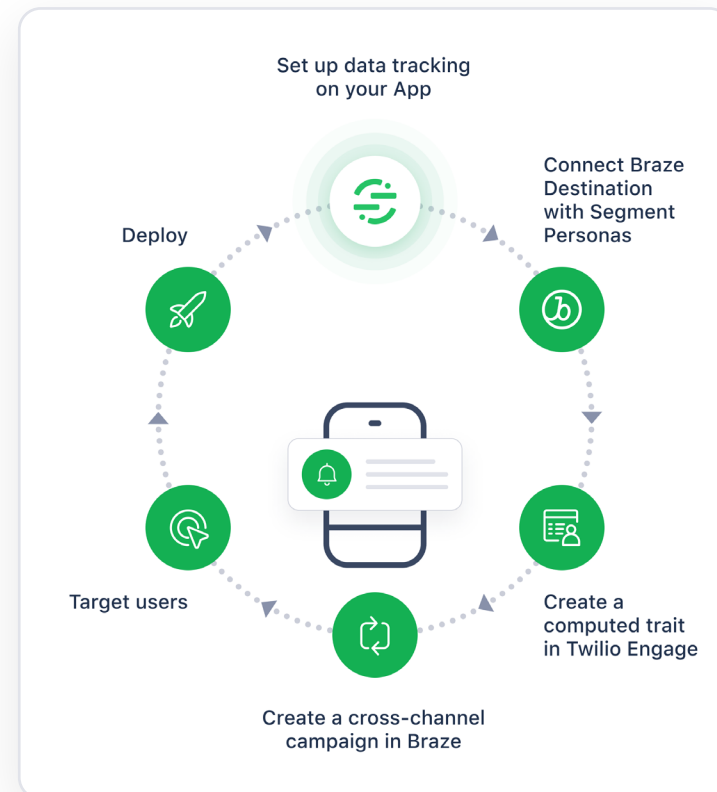
A marketer uses a cross-channel strategy when they reach customers through a combination of email, push notifications, in-app messages, and other methods. Twilio Engage and Braze make it easy to orchestrate and personalize such campaigns based on your customer data.

Follow these steps to implement a personalized, cross-channel messaging campaign with Segment and Braze:

1. **Start tracking customer data.** Set up the channel where you want to collect customer data—for example, your website or app—as a source in Segment. Add the relevant eCommerce events from [our default list](#).
2. **Configure Twilio Engage.** Create a Twilio Engage audience based on one or more traits you want to use to personalize your campaign. You could, for example, capture which product category your customers have viewed most frequently. Send this data to Braze by adding it as a Destination in Segment.
3. **Design a cross-channel campaign in Braze.** Create a new Multichannel Campaign in the Campaigns section of Braze. First, set up a mobile notification that will attract the customer's attention. Then design a content card within the app where the user will arrive after clicking the message.

4. **Deploy your campaign in Braze.** Use the testing function in Braze to ensure everything works correctly. Select the audience you'll target with the campaign based on the audience you're sending from Segment, then launch your campaign.

[Read the step-by-step instructions here >](#)



Case Study 15

INDUSTRY

B2B SaaS and Technology

HEADQUARTERS

Los Angeles, California

PRODUCTS

Connections
Twilio Engage



Tillster Increased Repurchase Rates with a Personalized Loyalty Campaign

Challenge

Tillster, a leading digital solutions provider—e.g. mobile ordering—for restaurant brands like Burger King, had seen some success with personalization, but felt it could do more to deliver even better results. Tillster needed to empower its brands with reliable, trusted data that could activate customized solutions and better engage end users.

Solution

To keep up with the competitive digital restaurant industry, Tillster turned to Twilio Segment to collect and unify more granular data. Now, with a modern data infrastructure, Tillster empowers its clients to provide more personalized loyalty campaigns at scale, which has resulted in increased user adoption and lifetime value.

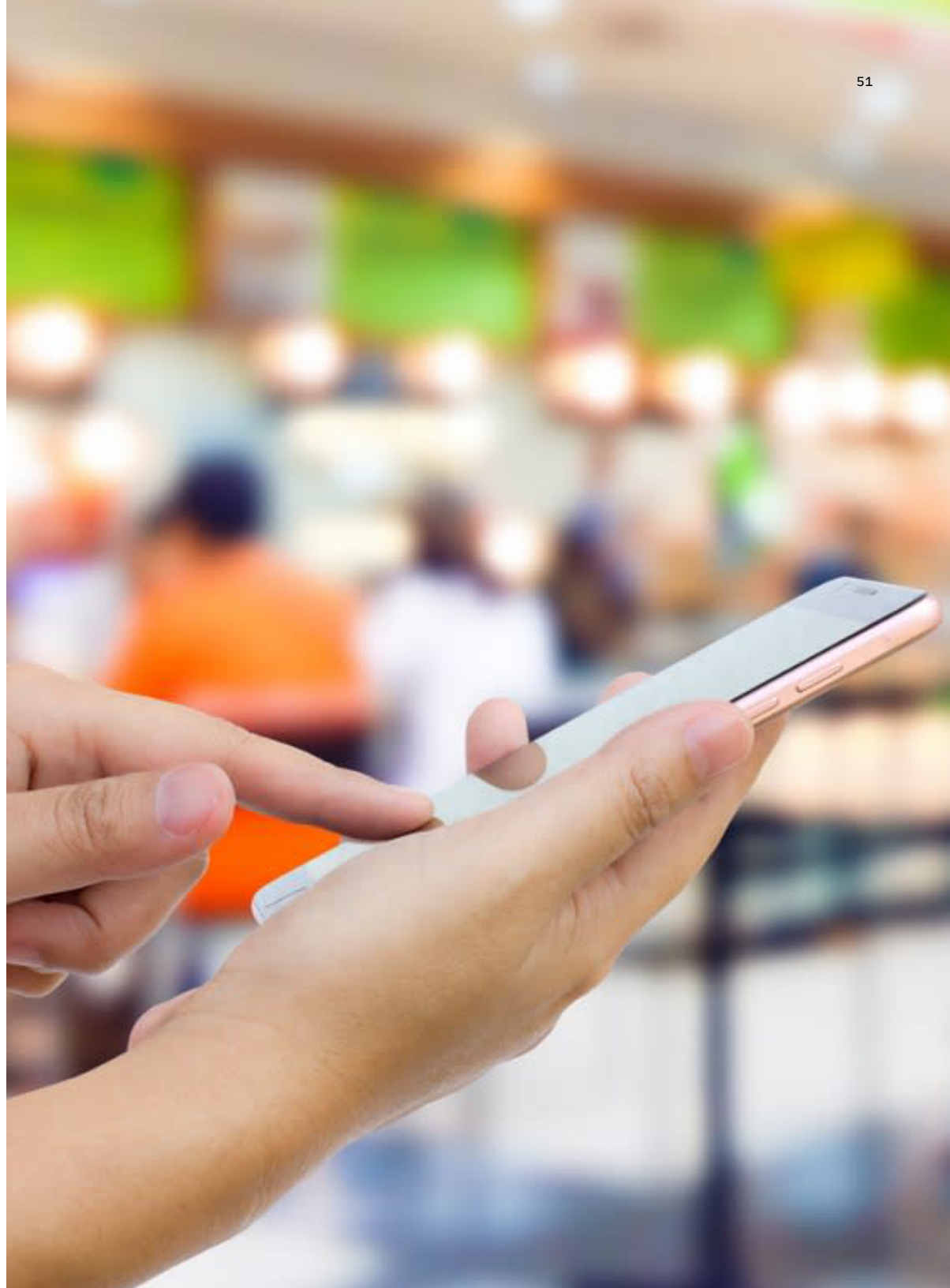
Results

Using Segment, Tillster connected its own loyalty platform and messaging tools to create a cohesive multi-channel campaign. As part of this campaign, Tillster sent messages via email and push notification, incentivizing users with bonus points to try mobile ordering. With this campaign, Tillster's client saw a 50% increase in mobile order adoption and repeat customers.

[Read the full customer story here >](#)

“The kinds of attributes we pull into Segment help create a more diverse range of personalization capabilities. Before, it was mostly just purchase behavior we were looking at. Now, we look at intent and behavior data, rather than just transactional data.”

Farzana Noorzay
VP of Analytics, [Tillster](#)



Retention Strategy 15

Increase Conversion with Personalized Lifecycle Campaigns

Personalized email campaigns based on buying personas can increase conversions by nudging people forward to the next stage of your funnel until they complete it.

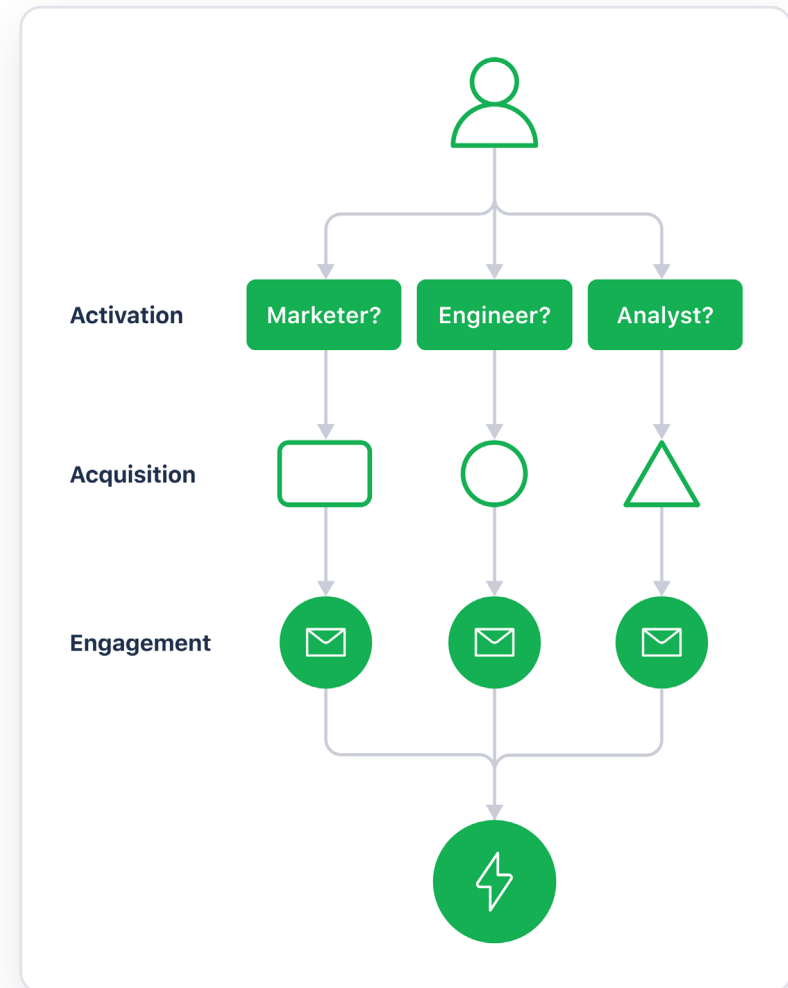
First, split your users into different audiences according to factors like demographics, behavior, and lifecycle stage. Then, map out the sections of your funnel by working backward from your ultimate goal, usually to convert someone to a paying user.

Set up tracking events in Segment that correspond with your funnel stages. For example, when someone signs up for a free account, that event could signal they've moved from *acquisition* to *onboarding* in your funnel.

Create personalized emails for each persona and lifecycle stage once you've set up your tracking events. The campaign flow will look like a matrix, and you can do this in email marketing tools that connect to Segment, for example, Customer.io. Measure your email campaign through two lenses once it's running:

1. Its impact on your core metrics, which you can do with A/B tests
2. The performance of individual emails by keeping an eye on their open and click rates

[Read the step-by-step instructions here >](#)



Start Winning with Personalization Today

We hope these cases and strategies have made one thing clear: there's no valid excuse for waiting to deliver personalization for your customers.

With Twilio Segment and its hundreds of integrations, you no longer need to consume valuable engineering resources to have a privacy-compliant, omnichannel personalization approach ready in days, not weeks or months.

This guide should have given you practical instructions and inspiration to address challenges at every critical stage of your customer's journey using Segment:

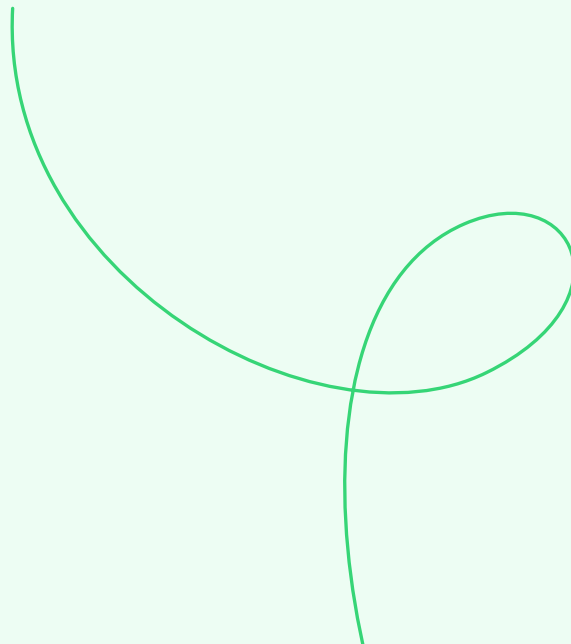
- **Acquisition** covers the early stage of your funnel, responsible for metrics such as new user signups and advertising ROI.
- **Real-time activation** provides insights into tailoring the user experience while your customer is active on your website or app. Such personalization improves conversion and engagement.
- **Retention** shows how to turn customers into loyal fans that keep returning to your product or service, captured in metrics like retention rates and repeat sales.



Want to unlock the power of personalization with your customer data?

Learn why 25,000+ satisfied customers are already transforming their businesses on the Twilio Segment platform – charting new territories in personalization and satisfaction, driving improved sales, and enjoying the benefits of precision-targeted customer engagement.

[Request a demo](#)



Recommended reading



The Customer Data Platform Report 2023

Our new Customer Data Platform Report analyzes real data from the Twilio Segment platform (nearly 12 trillion API calls to be exact) to examine the biggest digital trends happening in customer engagement.

[Get the report >](#)



Digital Advertising in the Cookieless World

Learn how to deliver personalized and more transparent experiences in the absence of third-party cookies.

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Customer Acquisition Cost (CAC): A Guide for 2023

In this guide, we share the CAC formula and explain how to calculate it. We also look at what makes a “good” CAC, how to determine an LTV:CAC ratio, and what steps you can take to improve both metrics for long-term success.

[Download the guide >](#)



Thanks for reading



If you would like to learn more about what Twilio can do for your business,
please [contact the Segment sales team](#).