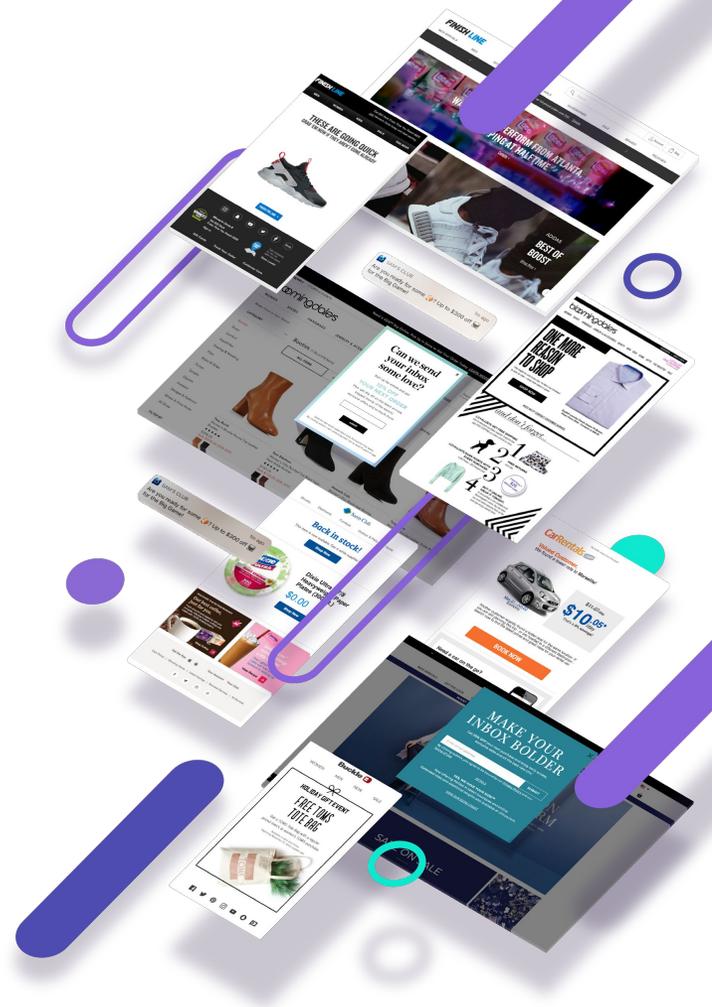


Retail Personalization Playbook.

Increase revenue now and customer relationships over time with these highly personalized, cross-channel experiences.

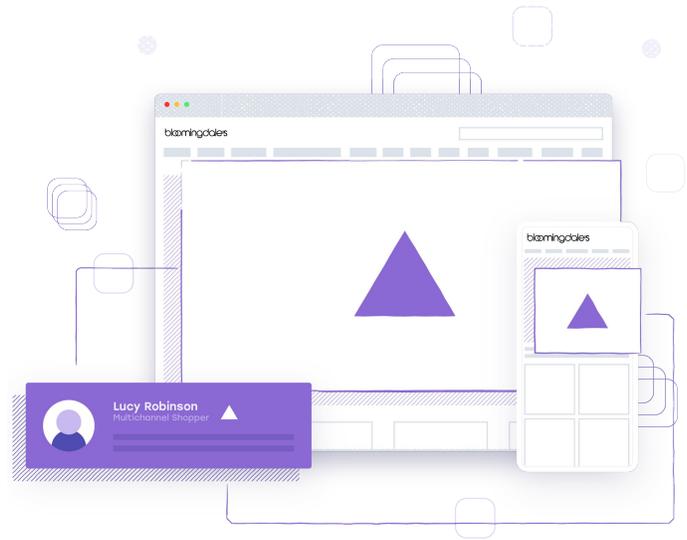


The Game Plan

72% of consumers now say they *only* engage with marketing messages tailored to their interests.¹ As customer expectations continue to rise and shopping preferences shift, it's more important than ever to prioritize personalization.

Unfortunately, limited resources, constant competition, disparate data, and conflicting priorities can make delivering 1:1 communications seem like a daunting task. But it really doesn't have to be—and that's where this playbook (and SmarterHQ) come in.

We've compiled our most effective campaigns to offer solutions to many of the problems marketers face today, spark inspiration from top brands, and show how simple, yet extremely impactful personalization can be—as long as you have the right partners in place. **Need more proof? Take a look...**



¹ SmarterHQ Privacy & Personalization Report

Here's a play-by-play on a few of our clients' results:

bloomingdale's

395% increase
in campaign revenue

FINISH LINE

2x increase
in revenue per session

AMERICAN EAGLE

366% increase
in email engagement

In this playbook, you'll find client examples, campaign details, and tips to help you get started with powering highly relevant, cross-channel experiences proven to increase revenue and drive long-term customer loyalty. **Let's dive right in.**

Cross-Channel Abandonment

Channels: Email, Push



The Problem

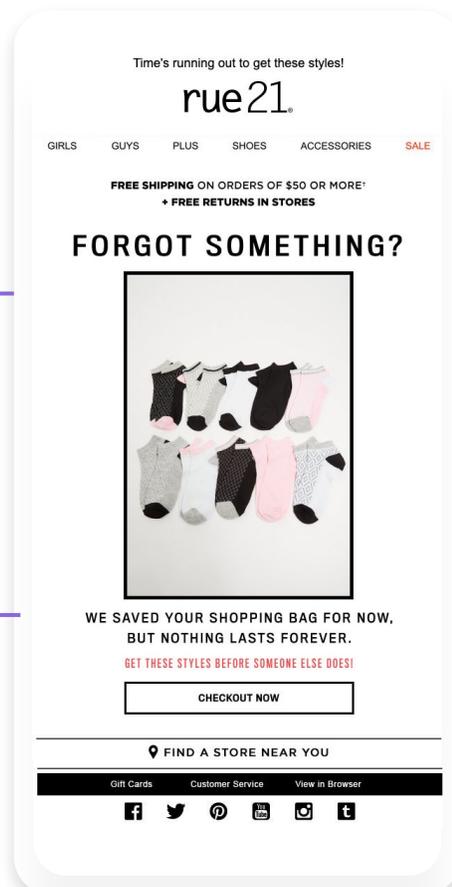
Simple cart abandonment drives revenue but leaves so much room to create a disjointed or irrelevant customer experience.

Our Solution

Understand and unify behavior across all touchpoints to send individualized, accurate triggers that convert your customers no matter where they engage with your brand.

Remind customers about items they carted but *didn't* buy in another channel

Avoid over-sending with flexible, business-friendly audience/timing rule adjustments



Activate

Customer Identity Resolution gives your triggered campaigns the whole history—phone or laptop, web, mobile app, in-store, multiple email addresses—collected and clicked.

Identify

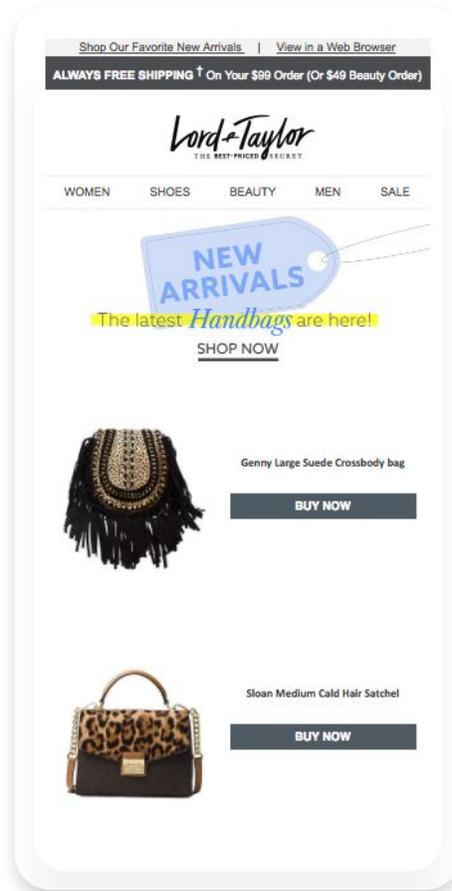
Target very specific audiences with easy, flexible rules, and send alternate content to those who have already received these triggers for more relevance per touch.

Automate

Tweak business rules and customer-specific content to email, web, push, and more without needing help from your tech team.

Brand & Category Browse

Channels: Email, Online, Push, Ads, Direct Mail



The Problem

Customers are no longer using one device to shop, making it harder to unify their cross-device browse behavior and deliver highly personalized content tailored to the brands and categories they show specific interest in.

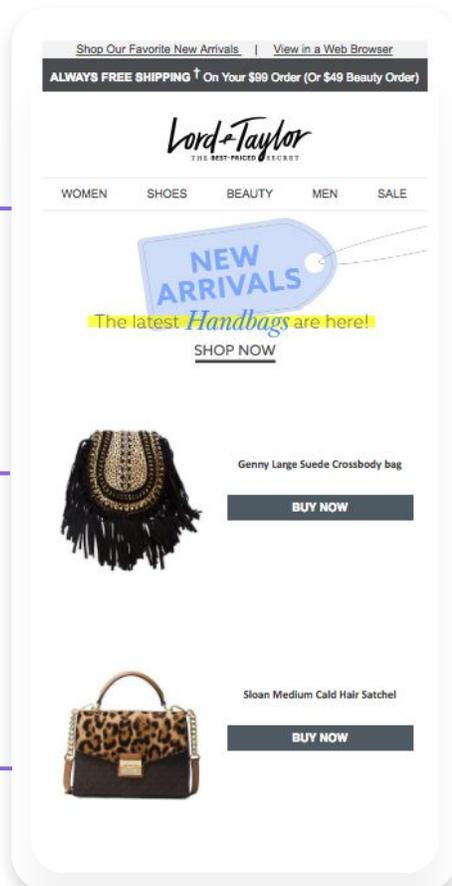
Our Solution

SmarterHQ's Customer Identity Resolution capabilities unify behavior and history across devices to fine tune the most relevant, real-time messages possible based on ALL of their behavior.

Unify behavior across devices and channels for the most relevant message

Creative based on highly targeted customer interactions

Showcase content by browsed category or brand, 1:1 recs, and more



Activate

Collect and unify customer behavior across devices with first party data—products, categories, brands, and more.

Identify

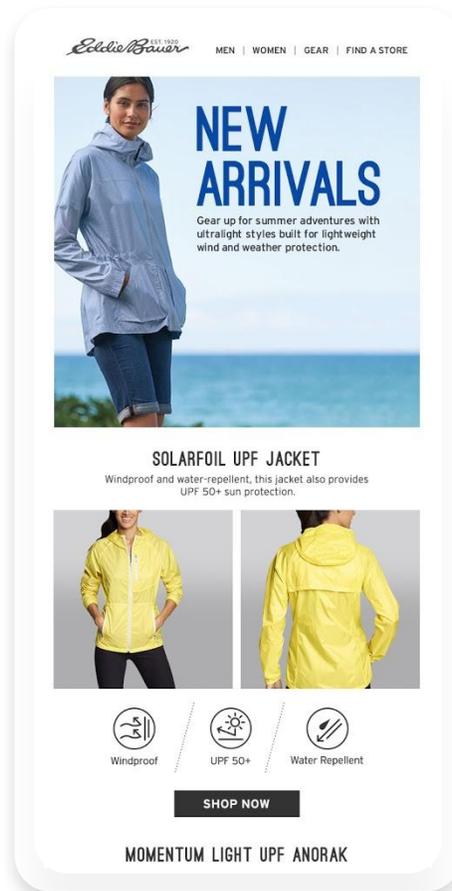
Identify the audiences that most closely match your creative and focus areas based on their behavior, no matter where they choose to interact.

Automate

Focus on creative that will be most relevant to your customers based on browse behavior—and personalize at scale.

Personalized Blast Send

Channels: Email, Direct Mail



The Problem

Batch-and-blasts burn out audiences quickly, and personalizing blast sends has long been a tricky and time-consuming task.

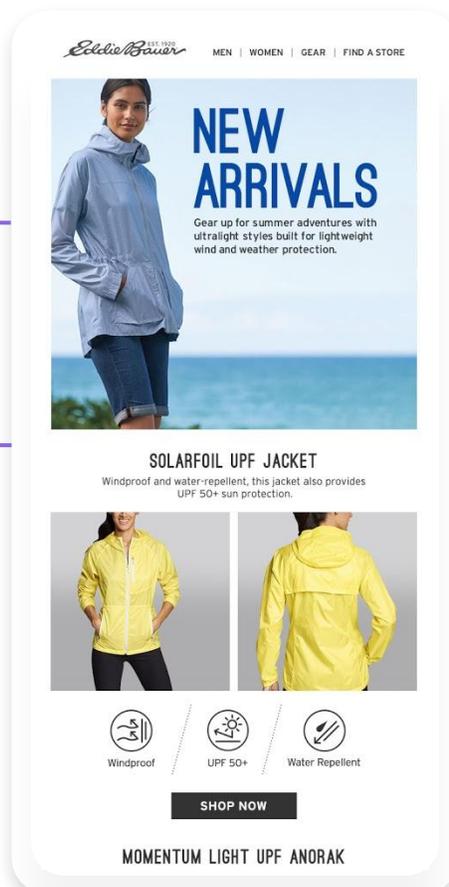
Our Solution

Generate 1:1 content to use within your mass campaign templates to make them more effective—with less effort on your part.

Segment and send branded content to key groups with similar interests

Customize based on engagement history, without needing additional creative

Use content blocks to show browsed/carted items, recs, and more within blast sends



Activate

Pair intelligent product recommendations, retargeting based on purchase funnel behavior, and curated cross-sell and upsell content with individual customers.

Identify

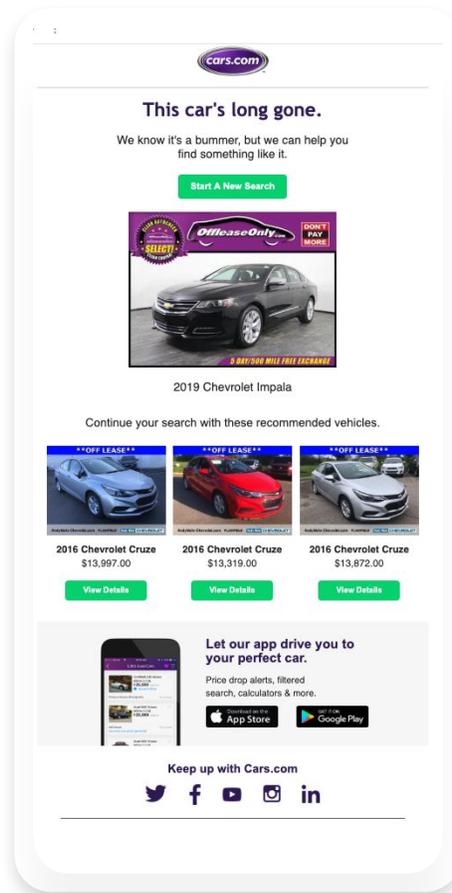
Prioritize the appropriate sets of personalization (content blocks, whole-email sends) for all of your customer segments.

Automate

Automatically update content as soon as your customers complete their interaction, and weave them into your promotional templates within any of our integrated ESPs.

Product Recommendation Blocks

Channels: Email, Online



The Problem

It's hard to effectively curate a set of recommendations that will be relevant enough for each of your customers based on their individual history and interactions.

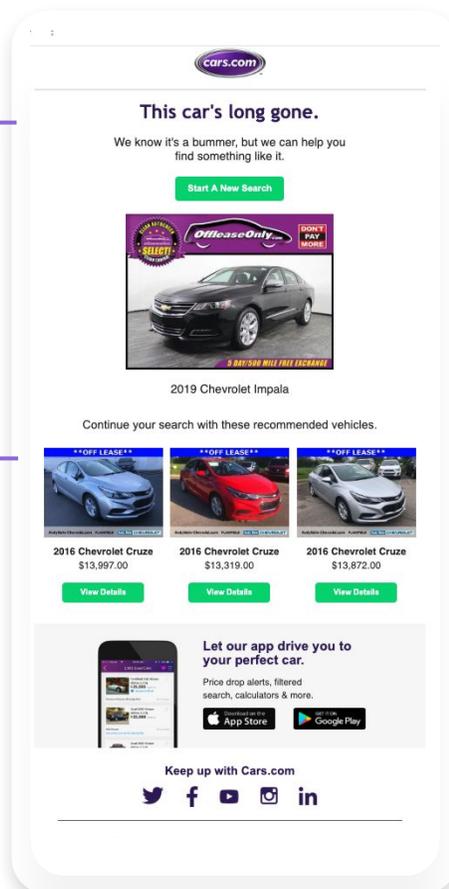
Our Solution

Intelligent recommendations driven by machine learning link products based on all customer interactions and match the strongest ones to each individual.

Trigger messages for products that they saved, but are now out of stock

Offer 1:1 personalized recommendations

Product recs made more accurate with cross-channel data and identity resolution



Activate

Understand strong recommendations based on customer interactions, including views, carts, and purchases across all channels (web, app, and offline).

Identify

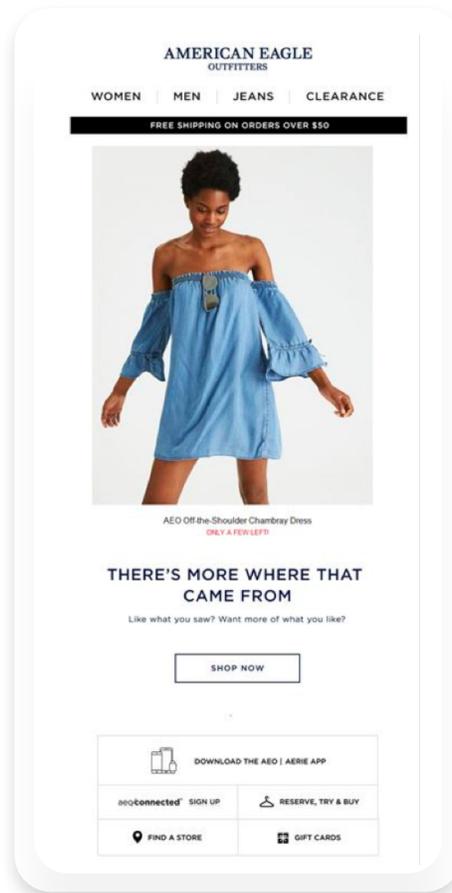
Match the strongest recommendations to each customer's behavior history.

Automate

Leverage recommendation blocks as a re-engagement tool, a secondary CTA, to cross-sell, and to prompt future purchases across multiple campaigns with ease.

Product Alerts

Channels: Email, Push



The Problem

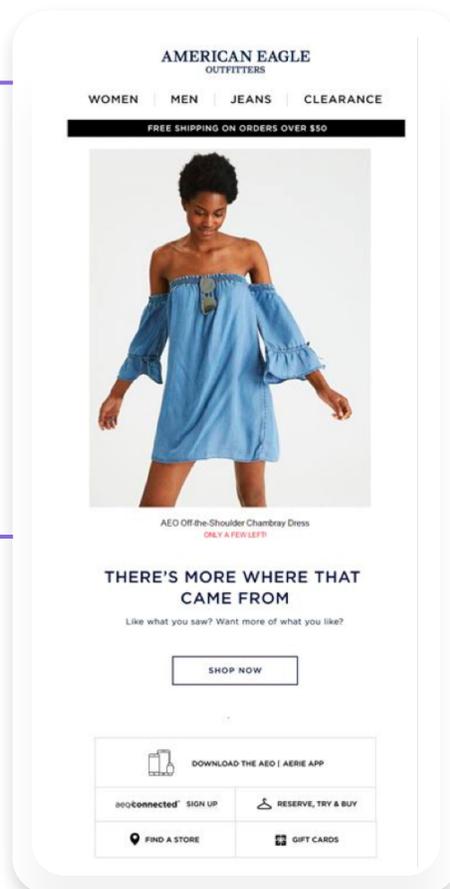
Most people love a good deal, but it's hard to prioritize and send alerts based on the products your customers care about.

Our Solution

Marry real-time product catalog changes with customers who have shown interest in those products at any stage in the purchase funnel to drive highly targeted, high-conversion messages.

Only target customers who have interacted with specific products—based on viewed, carted, purchased, and wishlist activity

Automatic price drop, low inventory, or back in stock detection



Activate

Process your product/content catalog and all product interactions regardless of sales channel.

Identify

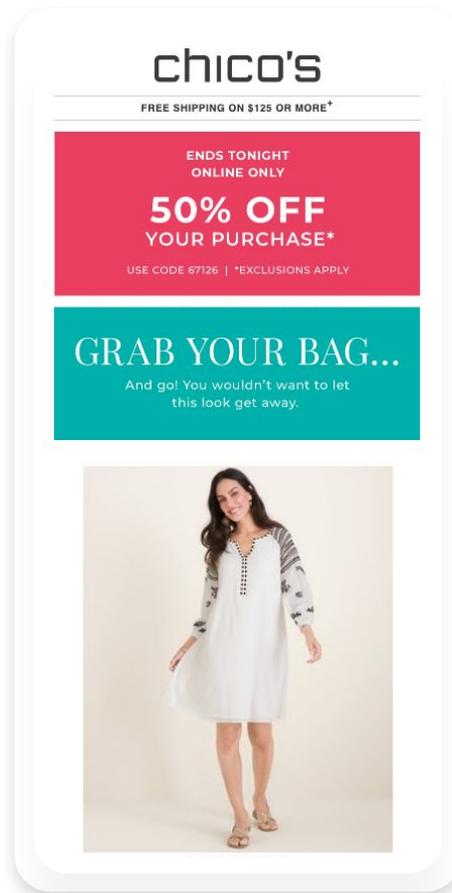
Flexibly generate audiences who have viewed, carted, or even wish-listed a product that has lowered in price, inventory, or recently become available again.

Automate

Scale this campaign across your entire product/content catalog, and trigger messages to urge customers to buy now before it's too late.

Targeted Sales Series

Channels: Email, Push



The Problem

Sale previews and last chance reminders to save are effective conversion tactics, but it's hard to cater the sale to the product(s) your customers are interested in.

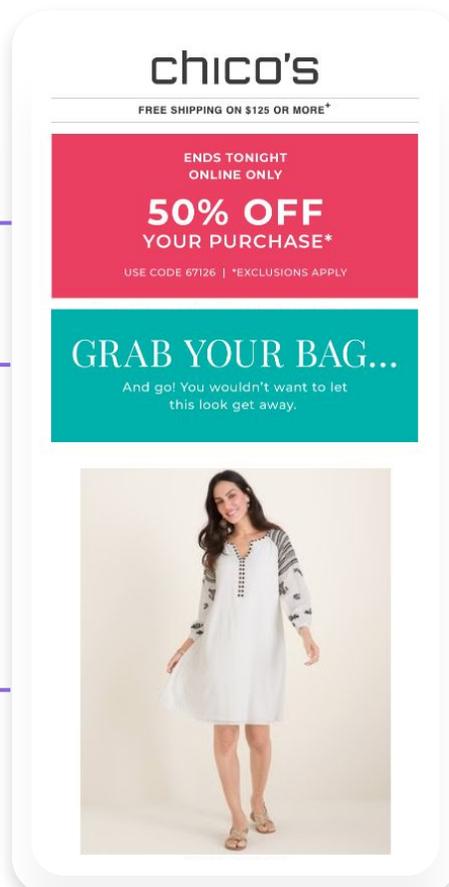
Our Solution

Easily execute ad-hoc sends targeted only to those who have shown interest in items nearing the end of their sale period—and give first access or promo extensions to customers based on their interactions.

Only target customers interested in sale items

Automatic or customized sale product groupings

Easy ad-hoc identification, prioritization, and scheduling



Activate

Process your product catalog so only items on sale are available.

Identify

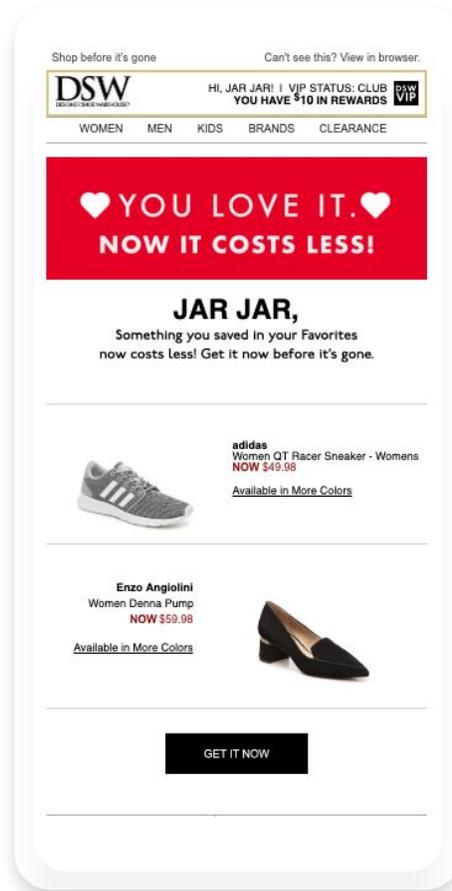
Target only those customers who have reached a certain threshold of views, cart, or wishlist activity against specific sale items or custom product groupings.

Automate

Launch ad-hoc, precisely timed sale introduction, sale mop-up, and/or sale extension messages in minutes, not hours or days.

Wishlists & Favorites

Channels: Email, Push



The Problem

Wishlists are becoming more common with multitasking customers who want to go back and view products, but most solutions don't know how to weave these in with other personalized triggers.

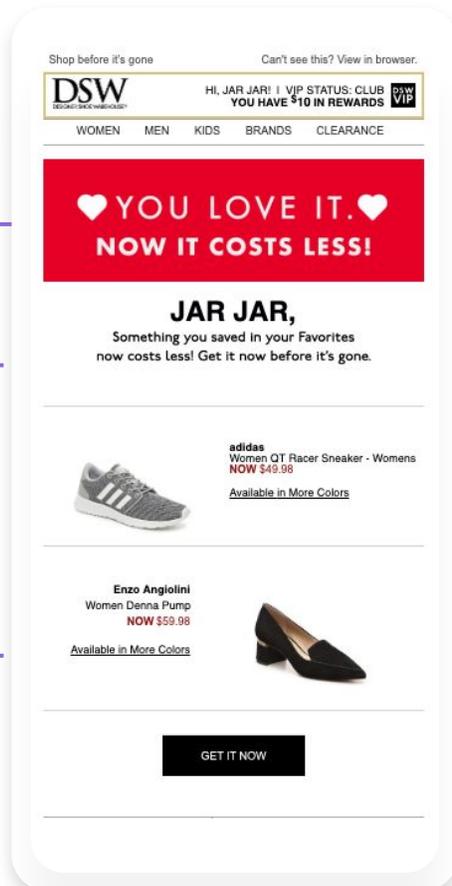
Our Solution

Identify and connect with those who are actively engaging and showing interest in things they are more likely to buy—and send extremely relevant messages such as product alerts or gift guides based on items they've wishlisted throughout the year.

List interactions collected alongside products viewed, carted, purchased

Identify audiences who have saved items in specific categories or brands

Automatically pull in products to make completing purchase easier



Activate

Collect wishlisted or favorites activity alongside other key product interactions for deeper segmentation and retargeting.

Identify

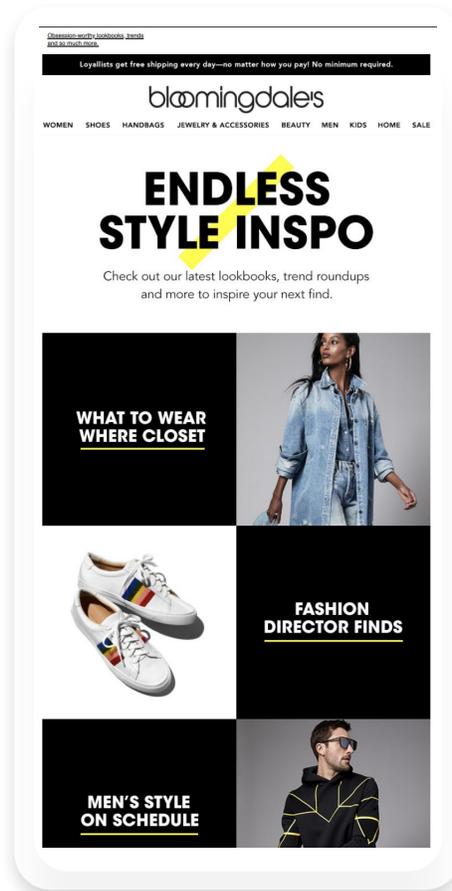
Re-engage customers who are farther down the funnel and displaying intent to purchase specific items.

Automate

Flexibly retarget the products each customer has wishlisted in triggers and promotional sends.

Highly Engaged Non-Purchaser

Channels: Email, Online, Push, Ads



The Problem

There's a temptation to keep sending messages to those who are ready to buy but need an extra push—but these cues can frustrate customers who are not at that point in their journey.

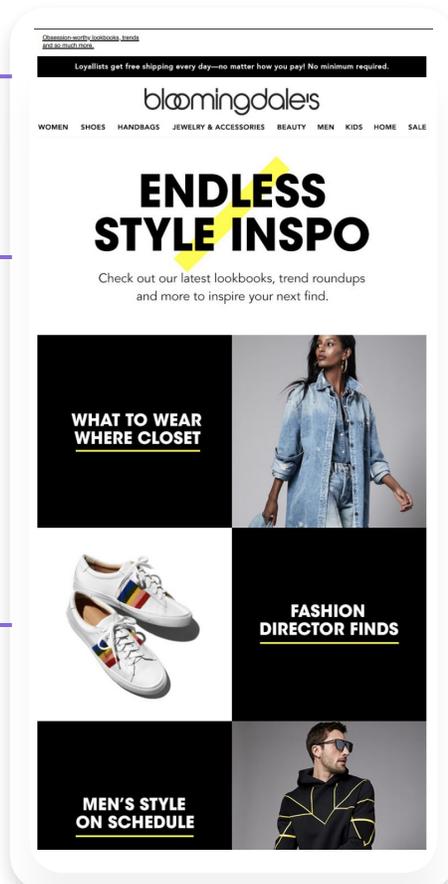
Our Solution

Use advanced engagement models to find and nudge customers who are ready to purchase, without annoying those who aren't quite ready to convert.

Target “modeled engagement score” audience

Send frequent, urgent messages only where and when it makes sense

Highlight top sellers by category instead of giving up promos



Activate

Model the engagement level of each of your customers across all sales channels to understand where they are on the engagement curve.

Identify

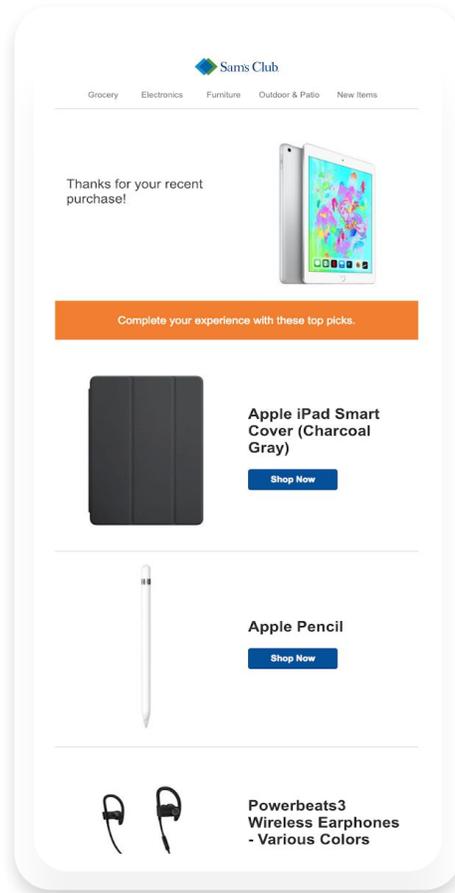
Pinpoint highly engaged customers who haven't completed a purchase on any channel.

Automate

Provide urgency in messages and offers to drive them to make a decision without annoying the rest of your audience or training customers to expect offers.

Personalized Post-Purchase

Channels: Email



The Problem

Post-purchase campaigns are a great chance to cross-sell, upsell, and nurture customers along, but it's hard to match customers with the right content for the situation.

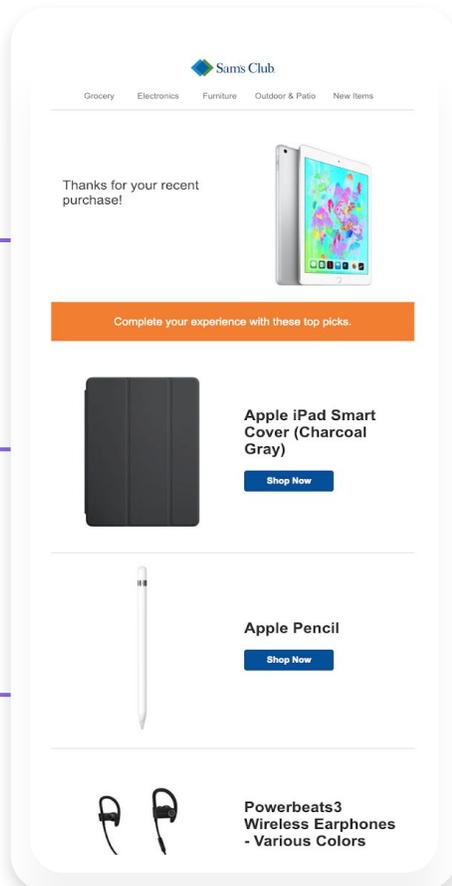
Our Solution

Leverage cross-channel customer profiles and recommendations to tailor post-purchase content to individuals—and produce immediate and long-term results.

Know your customers' full shopping history

1:1 intelligent recommendations based on all channel interactions

Content can be tailored based on which channel the customer made the purchase on



Activate

Unify customer browse and purchase behavior across online and offline channels, and generate intelligent product recommendations based on interests and activity.

Identify

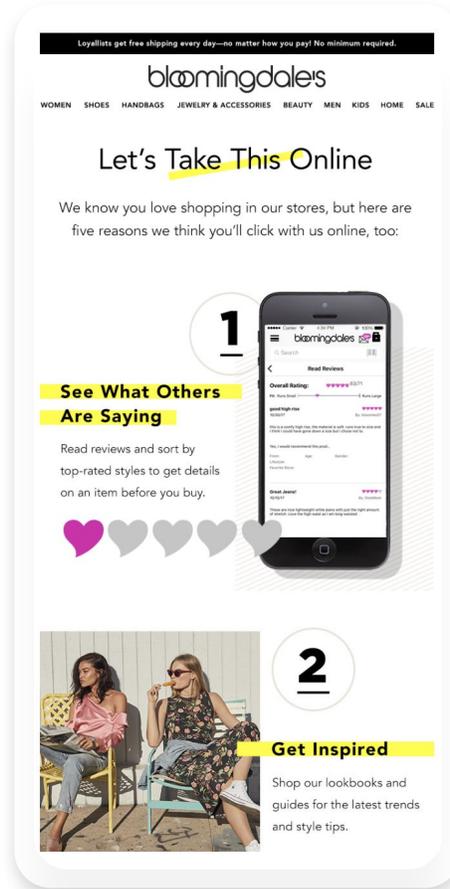
Tailor your post-purchase use cases to your customer personas for the best chance at quick re-engagement.

Automate

Scale campaigns that drive customers to buy again and stay top-of-mind for future nurture and re-engagement campaigns.

Cross-Channel Shopper

Channels: Email, Online, Push, Ads



The Problem

The most engaged customers are the ones that shop across channels. It's hard to effectively drive new cross-channel habits for stronger loyalty and retention.

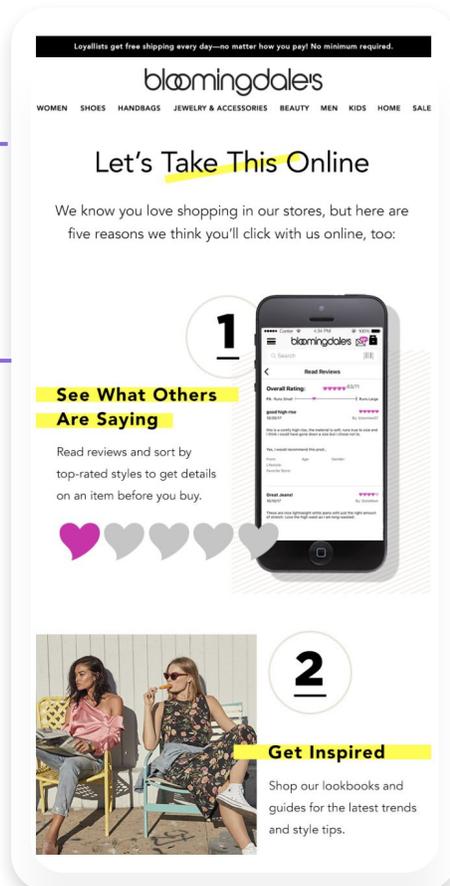
Our Solution

By combining offline purchase data with online behavior, craft and automate specific content tracks for buyers who fit this pattern—driving more in-store purchases and nudging them to buy online, too.

Encourage cross-channel shopper engagement

Introduce in-store shoppers to online reviews, brand resources, etc.

Personalize effectively for online window shoppers to drive more in-store traffic and revenue



Activate

Unify offline purchase behavior with online browse behavior.

Identify

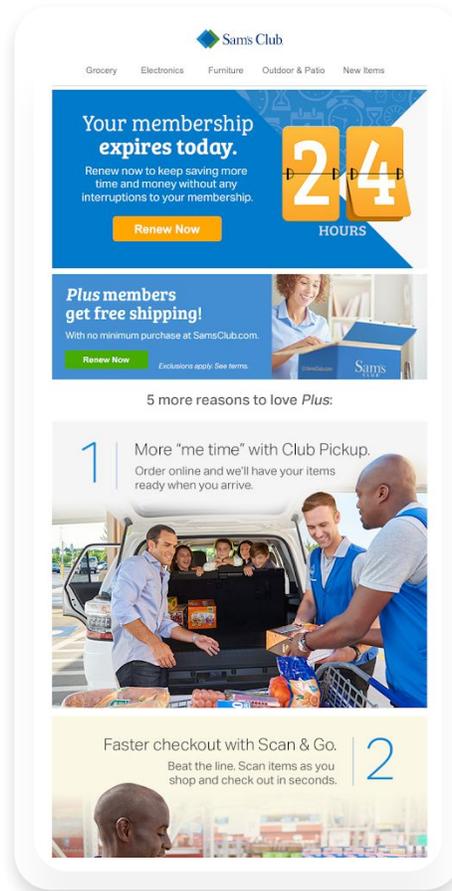
Find those customers who buy frequently in-store, and assign them as a specific group to treat differently than other segments.

Automate

Scale a different messaging/content journey for those key cross-channel customers based on their unique behavior.

Loyalty Tier Alerts

Channels: Email, Push, Ads, Direct Mail



The Problem

Loyalty programs and memberships are critical ways to retain and engage customers, but they aren't easy to personalize and leverage across channels.

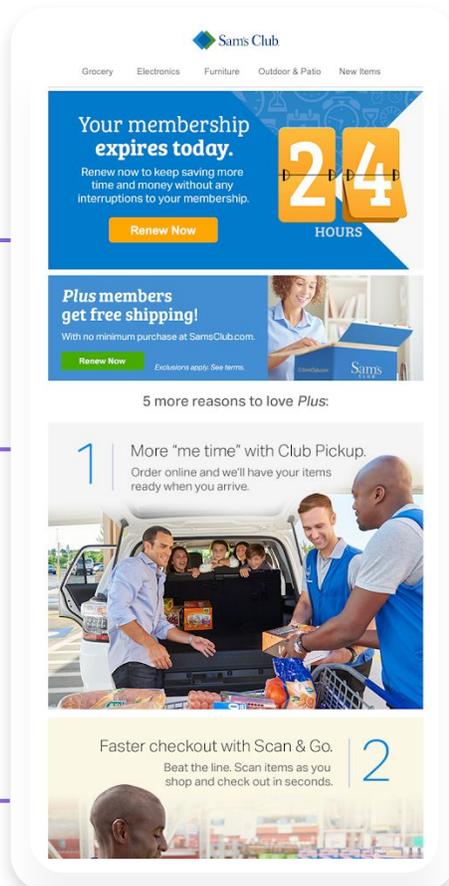
Our Solution

Integrate profile data like loyalty tiers and balances with customer behavior to easily automate highly personalized messages to your outbound channels.

Collect and leverage key dates, balances, status

Marry customer profile data with cross-channel behavior

Personalize loyalty messaging across channels



Activate

Collect profile data (status, important dates, balances) and combine with behavioral data for a full picture of who your customers are and their relationship with your brand.

Identify

Segment audiences by tier, balance levels, upcoming expiration or renewal dates, and whether or not they've taken a key action (visit, purchase) recently.

Automate

Scale personalized messages tailored to your loyalty, membership, or other key retention efforts across outbound channels.

Intelligent Email Collect

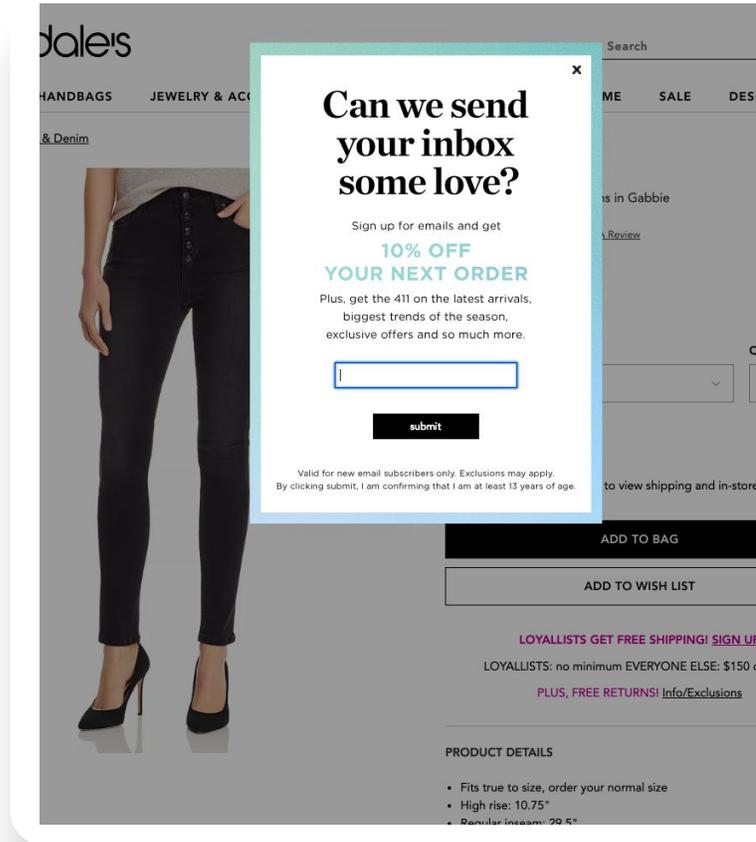
Channels: Online

The Problem

Most web modal solutions used to grow email lists or collect other key data points take a blunt approach, which can disrupt customer journeys and hurt conversion rates.

Our Solution

Intelligent email collect modals give you control on how and when to grab customer attention at the right point of interaction with your site.



Activate

Understand how a customer got to your site, their engagement level, and whether they are browsing certain categories or brands where alternate messaging can be used.

Identify

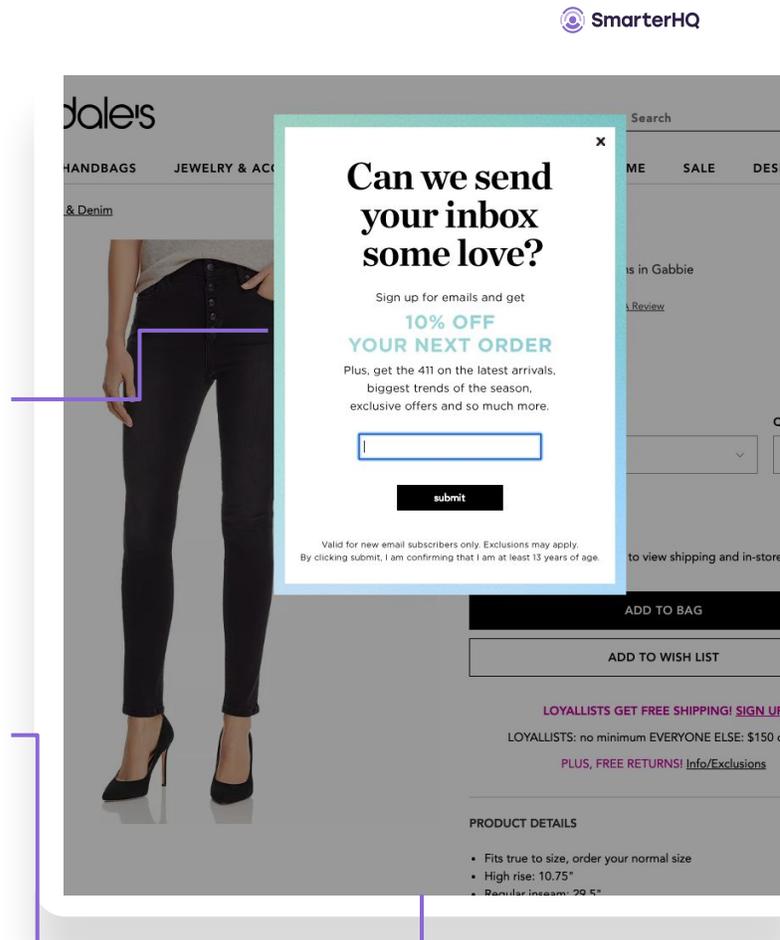
Target only those customers where it makes sense to ask for their email, and know if an offer or promo is needed in exchange for information to help personalize their experience.

Automate

Automatically launch special modal, tray, or other sophisticated creative in-line with a customer's journey on your site or upon exiting the site.

Request information at exactly the right time

Content in-line with the customer's journey



Targeted Site Transform

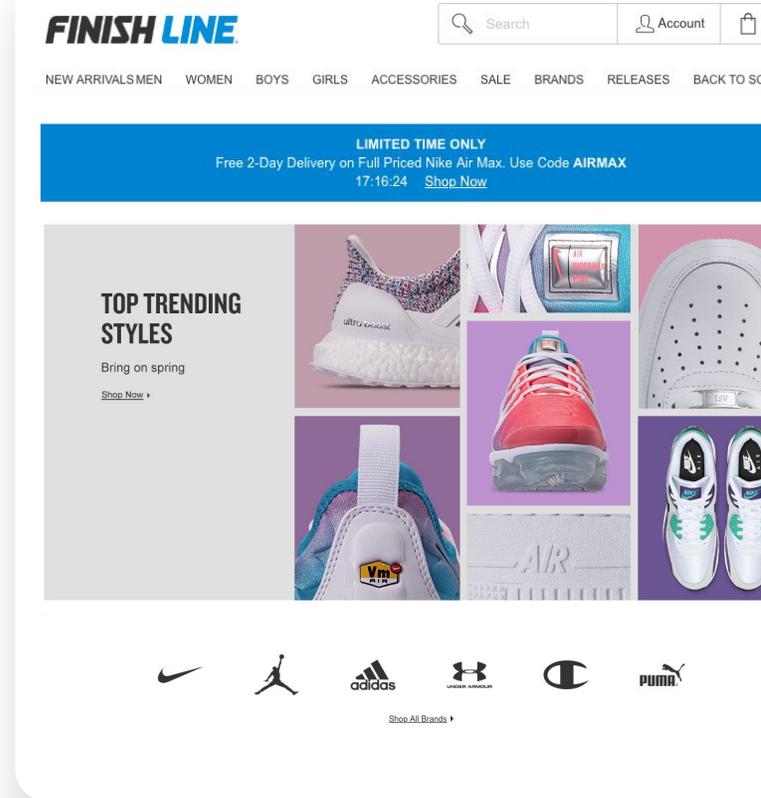
Channels: Online

The Problem

Most websites are optimized to appeal to your largest audience, but it leaves smaller customer segments with irrelevant site experiences and messaging.

Our Solution

Power audience-specific site transforms in real time to recognize and personalize key content on your website that drives maximum relevance, retention, and loyalty.



Activate

Collect a unified behavioral history, how the customer arrived at your site, where they are located, and in-session activity.

Identify

Segment audiences who may be underserved or at high risk for a disjointed experience from channel to channel.

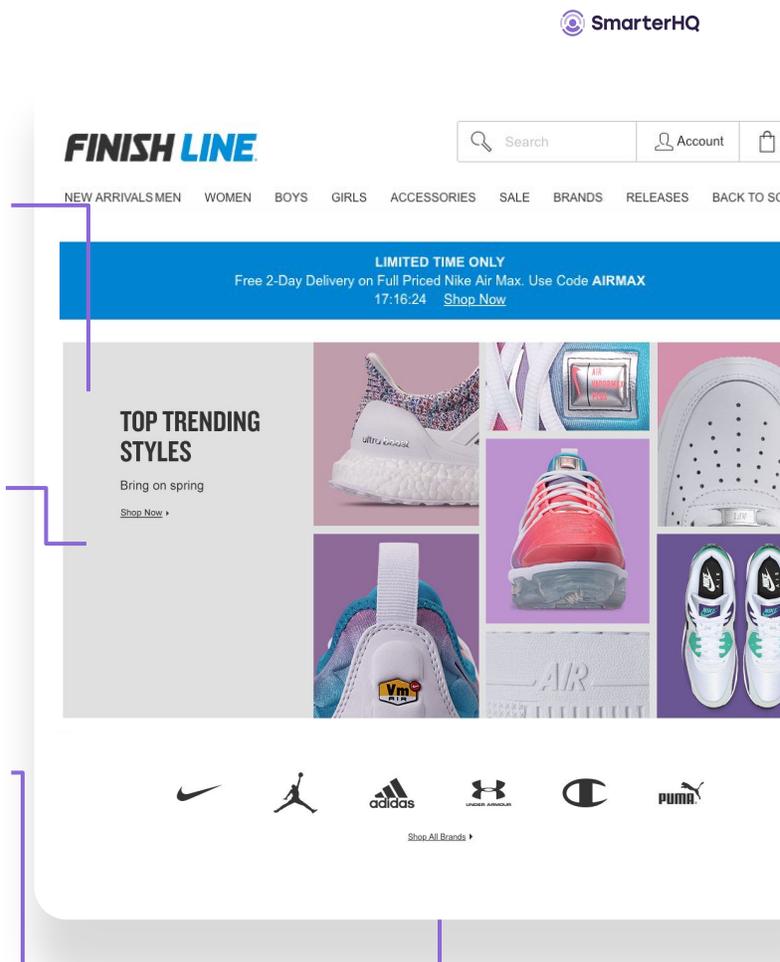
Automate

Transform key content in real time to match what's most relevant to the customer and avoid showing messages they don't care about or that don't make sense.

Reach key underserved customer segments

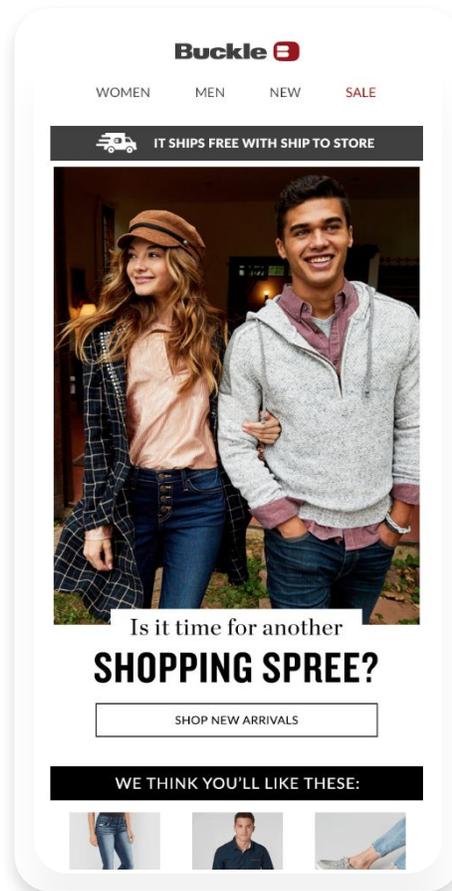
React to customer context, such as where they came from

Build loyalty and retention with relevance



Customer Reactivation

Channels: Email, Online, Push, Ads, Direct Mail



The Problem

It's important to keep the interest of disengaging shoppers, but it's hard to successfully identify, retarget, and win back these audiences across various channels.

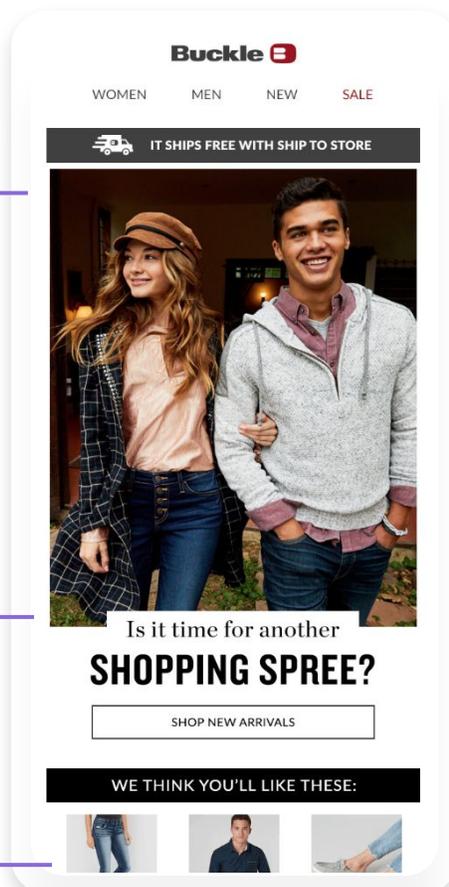
Our Solution

Easily identify those who have demonstrated a high level of modeled engagement in the past based on your brand's engagement curve—but are showing low levels of engagement more recently—to re-engage them with the most relevant message or offer.

Consider a one-time promo code or free shipping offer to give an extra nudge

Entice customers with a first look at new arrivals

Spark interest with 1:1 product recs or top sellers keyed to past purchases and behavior



Activate

Collect cross-channel, online, and offline behavior and purchase history for a full understanding of each customer.

Identify

Quickly segment those who have made a purchase X days ago (or even farther back in time, e.g. 6-12 months) but have not bought and/or interacted with anything since.

Automate

Automate personalized content to disengaging and at-risk browsers or purchasers with a specific campaign inviting them to come back and shop again.



About SmarterHQ

Our personalization platform makes it easy for marketers to increase revenue now and customer relationships over time by powering highly relevant, cross-channel experiences. Trusted by leading brands such as Bloomingdale's, Hilton, Santander Bank, and Finish Line, SmarterHQ activates real-time, multichannel data, identifies audiences quickly based on customer behavior and information, and automates personalized content across outbound and online channels.

Learn more at SmarterHQ.com