14 Strategies to Deliver Moments-based Messaging at the Enterprise Level

A crawl, walk, run checklist for personalizing 1:1 conversations across millions of contacts

CRAWL

WALK

RUN

Let's be real... Dynamic personalization at scale can be *hard*. Personalization feels like it's table stakes these days, yet many enterprises are struggling to execute hyper-personalized campaigns across huge customer bases. So let's take a step back together!

Dive into this checklist and learn how some of the world's biggest brands are implementing complex campaigns (that are still simple to execute). Discover exactly how to personalize at every step with an attainable crawl, walk, run approach.

Step 1: Take baby steps toward a more personalized experience

The key is staying customer-obsessed.

In theory, the foundation of every good marketing campaign is simple: know your customer. Who are they? Where do they engage? What are their pain points, goals, and motivations? Start focusing on these fundamentals – and start small.

☐ **Choose one customer segment** you want to get closer to and focus on them. See examples below for ideas!
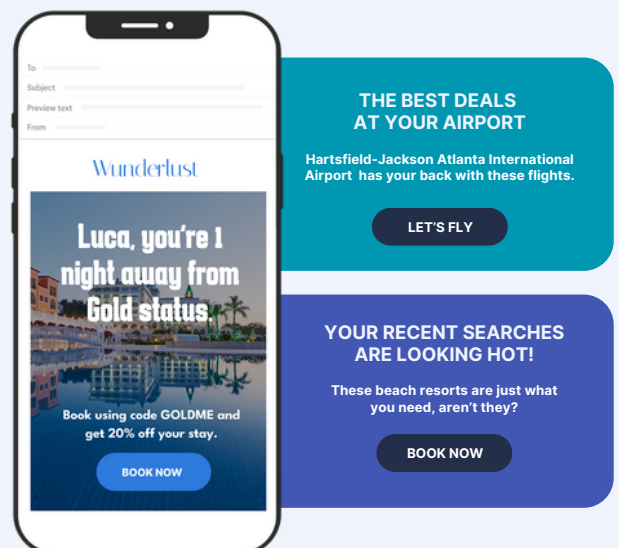
TOP 10% OF SPENDERS

RISK OF CHURN

HIGH ENGAGEMENT

☐ **Determine their preferred channel.** Or, if you already have a solid multi-channel campaign strategy, choose their top three channels.

☐ **Choose up to five unique attributes** you want to use for personalization in your campaign. Don't overthink it, but be thoughtful. Pull the data points that will make the biggest impact for your brand. What attributes might drive revenue, feel the most personal, or help you achieve your goals?

☐ **If you can't access those attributes on your own, make a friend on your data team.** And don't just submit a ticket but get them excited about the campaign! Share your goals and KPIs – or better yet, the revenue it could drive to the business. 🤑

☐ **Figure out how to best leverage these attributes in your campaign.** Again, don't overthink it. E.g. You can create a dynamic module that highlights the best customer insights you found in the body of some email copy.

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# Step 2: Pick up the pace (a little) with some testing and channel expansion.

Now that you've got your feet wet… You can have a little fun!

Once you feel confident implementing everything from step #1, you can easily start to expand your strategy. Take your time and incrementally get more complex as you go – otherwise things can get overwhelming real quick. This "walk" stage is all about testing and gaining even more insights on your customers.

- [ ] **Select a second customer segment to get close to.** Apply the skills you learned in step #1 to this group, too.

- [ ] **Start weaving multivariate testing into your campaigns** to determine what content performs best with your audience(s). This can be testing subject lines, intro messaging, dynamic variables, graphics, and more. There are really an unlimited number of things to test, so figure out what you think could best move the needle for your brand.

- [ ] **Now that you've got a friend in the data department, they can help you get 20 more attributes!** Based on what you learned in step #1, what else do you want to know about your customers?

- [ ] **Deploy your campaign on one additional channel.** If you're focusing only on email, for example, layer on a mobile push campaign and see what happens. You can start doing multivariate tests across channels when you're ready, too.

MULTIVARIATE TESTS ACROSS CHANNELS

SUBJECT LINE A	SUBJECT LINE B
We really miss you!	**Please don't go!**
OPEN RATE 30%	OPEN RATE 13%

EMAIL

PUSH
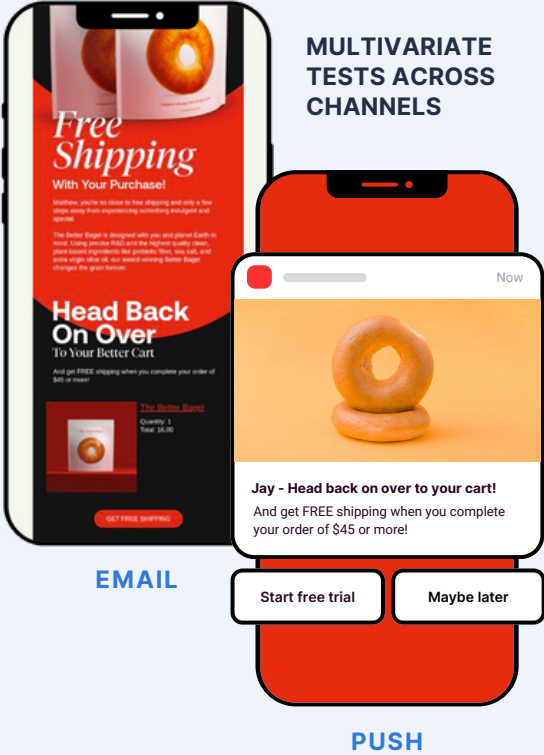
Step 3: Run toward full-fledged personalization at scale.

Start having advanced, 1:1 conversations across segments.

After you've nailed steps #1-2 and are enjoying the high of all your successful A/B tests, you're ready to run. You can iterate, optimize, and expand along the way. It's not an all-or-nothing approach, so layer on complexities as you and your team are ready.

☐ You probably saw this coming – **select a third customer segment to apply what you've learned** in the first two steps. This can scale for as many segments as you have, need, or want.

☐ **Use AI for more data-driven customer segmentation.** Leverage MessageGears' predictive modeling for AI-enhanced audiences to help you move fast and see better results. You can also incorporate AI-generated content using great tools like Phrasee and Movable Ink.

NEXT BEST CHANNEL	EMAIL
PREDICTED LTV	>$5K
ENGAGEMENT INDEX	HIGH

☐ **Start pulling your own customer segments with a data warehouse native solution** (like MessageGears 😉). You'll keep that great relationship you've built with the IT team while becoming far more autonomous – not to mention operating more efficiently.

☐ **Send campaigns across channels in (actual) real-time** to drive purchases and long-term loyalty. Once you've established a direct data connection, you'll no longer need to wait hours (or days) for data syncs between platforms. This is when the magic really happens! You can start to leverage those 20+ customer attributes for true, in-the-moment campaigns.

☐ For distributed organizations, **bridge the gap between corporate and local franchises with centralized templates and better data access**. By empowering regional managers/locations to get involved, you can scale personalization. With the right platform, you can ensure corporate branding stays intact while localized messaging is dynamically populated – which can really impact engagement.

M **Swiftie, there's a weather delay** 5 mins ago
Tonight's Taylor Swift concert is delay due to a storm. Show is now scheduled to start at 9PM. Bring a poncho along with your bracelets.

Culvers **Cool off with BOGO custard** Now
Stop by tomorrow at our Cumberland location for a BOGO custard deal to cool off during this heat wave.

Chick-fil-A implemented real-time, dynamic personalization across 32 segments, including 500+ email versions per deployment and a *"Congratulations on your first mobile order!"* module in their mobile app with a picture of the food a customer just purchased. The popular fast-food chain saw a 500% increase in app membership and a 20%+ increase in conversion rates.

Read their story →

Finding the right platform to power 1:1 conversations across millions of contacts

MessageGears has exactly what you need to deliver moments-based messaging in real time at the enterprise level

MessageGears is a warehouse-native customer engagement platform that delivers advanced customer segmentation, message personalization, and cross-channel delivery that simply outperforms other enterprise marketing clouds and data platforms. Through direct data access and innovative platform capabilities, marketers can deliver compelling customer experiences at massive scale, faster and more flexibly than ever before. We'll happily chat with you 1:1 and discuss how your brand can level-up your data-driven marketing strategies!

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