20 Ways to Win with
Personalization

Unlocking data-driven strategies for 2024

Introduction

Observing the world by looking out a window, one might be deceived into believing that little has changed. However, the profound impact of technology, particularly the recent advancements in AI and machine learning, is undeniable.
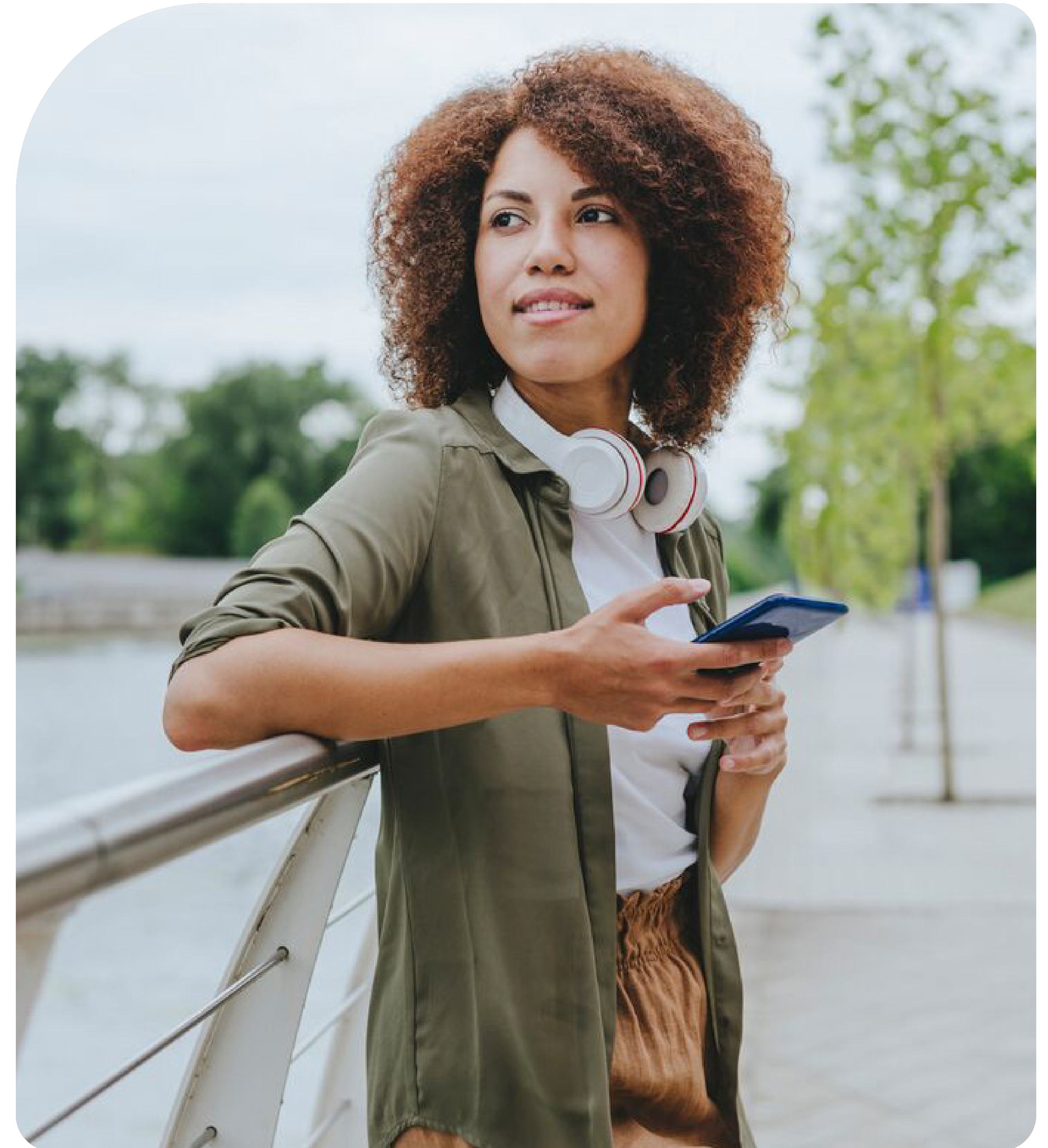
Digital tools have become more sophisticated, enabling companies to gain deeper insights, make more accurate predictions, and provide highly personalized user experiences. But as Steve Jobs noted, "Technology is nothing. What's important is that you have a faith in people, that… if you give them tools, they'll do wonderful things with them."

We agree.

As companies pursue innovative growth strategies, personalization remains pivotal, driving engagement and fostering customer loyalty. In Twilio Segment's latest **State of Personalization** report, 89% of business decision-makers see personalization as essential for their success in the next three years.

But delivering personalization across the customer journey isn't easy. It 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 20 use cases and strategies (10 each) by three phases of the customer journey—acquisition, real-time activation, and retention. These stages in the marketing lifecycle drive critical business metrics like increased customer engagement, 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.

Table of **Contents**

Chapter 02

Acquisition

Acquisition is 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.
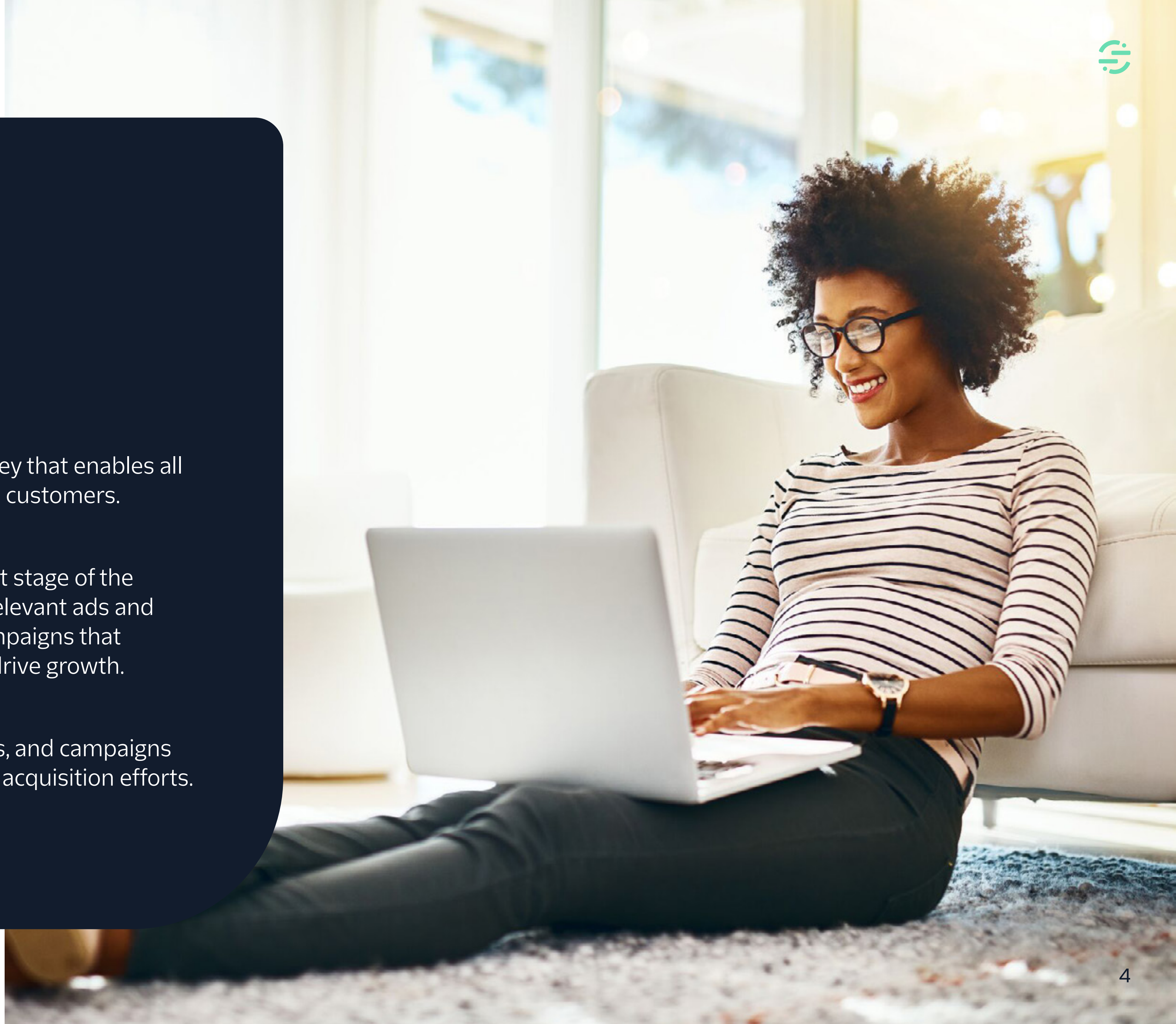
Case Study 1

Vacasa Increases Customer Engagement with Personalization

USE CASE	• Data powered performance marketing
	• Data powered digital customer experiences
INDUSTRY	• Travel
	• Real Estate
HEADQUARTERS	Portland, Oregon
REGION	NAMER
PRODUCTS	Connections

Challenge

Vacasa's existing web analytics tool had limited data collection capability and provided little visibility into how customers were navigating the website. Without clear insight into the customer journey, Vacasa struggled to create effective marketing and lifecycle campaigns, and lacked a concrete understanding of how current campaigns were performing within downstream tools.

Solution

Vacasa implemented Twilio Segment to unify and centralize data and better engage customers who showed interest in rental properties but hadn't completed a booking. Using Twilio Segment, Vacasa has real-time access to trusted, actionable customer data that empowers Vacasa to unlock highly personalized email marketing campaigns.

Results

Vacasa's personalized email marketing strategy increased guest bookings by 3X and delivered a seamless customer journey that fuels customer engagement and growth.

Read the full customer story here

"Capturing event activity and building a customer data pipeline in Twilio Segment and then passing it into our data warehouse to create an accessible schema has been a complete game changer–it allows us to get communication out to customers within a few hours rather than a few days. We can get an exact look at event history to see whether we need to send emails to people that have received the alert email, but didn't open or take any action."

Brad White
Marketing Technology Team Lead, **Vacasa**

Acquisition Strategy 1

Re-engage Cart Abandoners with Personalized Email Campaigns

Email campaigns that target cart abandoners are an effective way to increase purchase conversion rates. Sadly, many online retailers don't have the required data infrastructure to personalize and send out such emails.

Combining Twilio Segment with an email tool like Braze allows you to set up automated, personalized campaigns to recover lost sales from cart abandoners. Follow these steps to set this up:

1. **Set up data tracking.** Add Segment's tracking functionality to your website to capture events that identify cart abandoners. Select Braze as a Destination where you'll send this data.

2. **Create an email campaign in Braze.** In Braze, click on the "Create Campaign" button in the "Campaigns" section and select the "Email" option. Develop an email and use the data you're syncing from Segment to target cart abandoners and personalize the content of your email.

3. **Deploy your campaign.** Select "Start Campaign" in Braze and monitor the results. Braze will show you the number of emails sent, opened, clicked through, sent to spam, and bounced for each campaign.

Read the step-by-step instructions here

Case Study 2
Sanofi Drives Customer Engagement with Personalization

USE CASE
- Data enabled sales and support teams

- Data powered performance marketing

- Customer insights and analytics

- Customer 360

INDUSTRY   Healthcare

HEADQUARTERS   Paris, France

REGION   EMEA, APAC, NAMER

PRODUCTS
- Twilio Engage
- Protocols
- Connections
- Profiles Sync

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 data points, such as 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 2
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*

🔍 purchase

Track Purchase
Record purchases in Braze

Cancel   Next

USE CASE	Data powered performance marketing
INDUSTRY	• Consumer Goods and Services • Retail
HEADQUARTERS	Mexico City, Mexico
REGION	NAMER, LATAM
PRODUCTS	Twilio Engage

Case Study 3

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 Twilio 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 Twilio 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%.
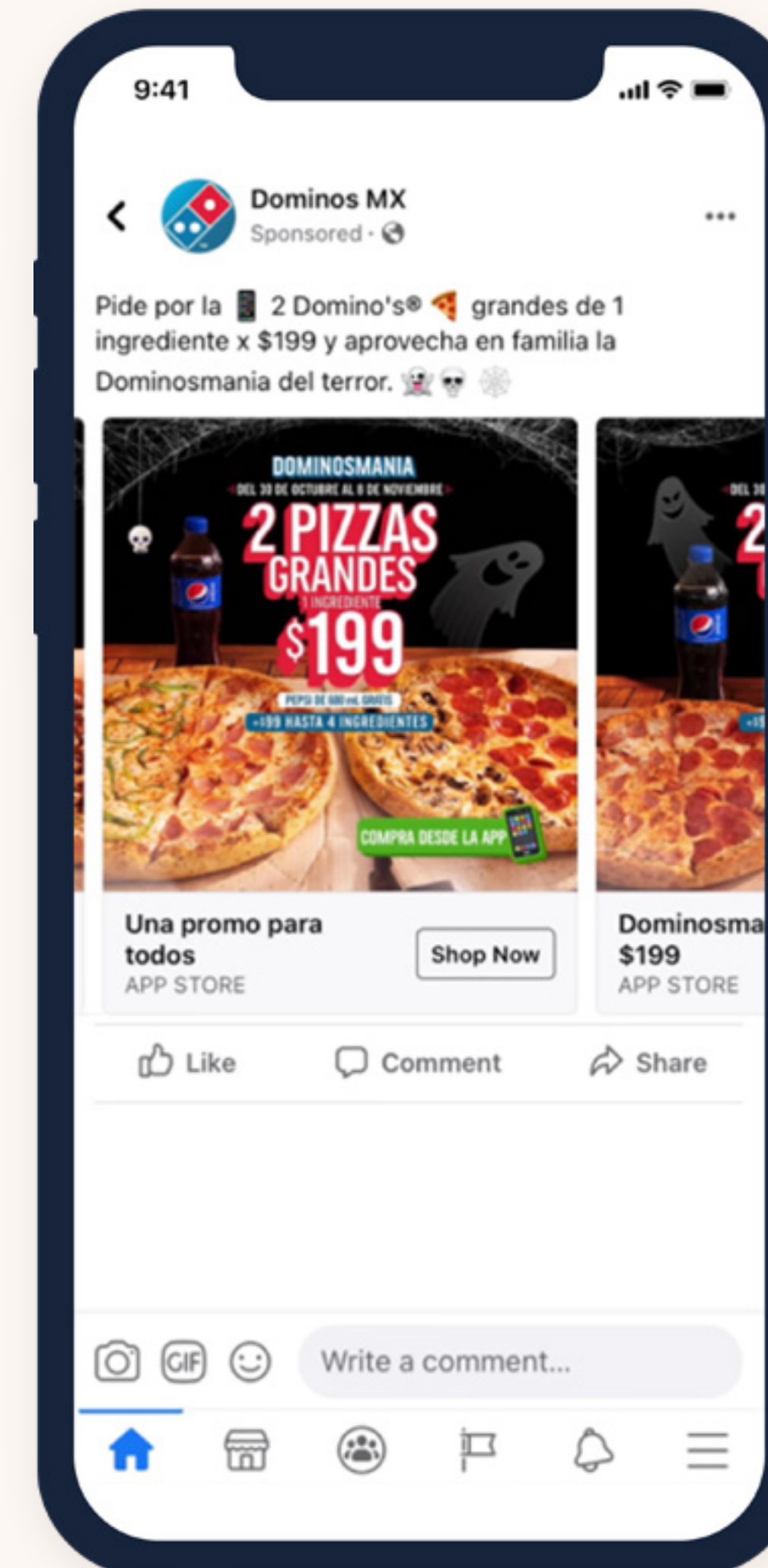
Read the full customer story here

"Having Twilio 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 3
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.

Read the step-by-step instructions here

Best users

Facebook Ads

More users that look like them
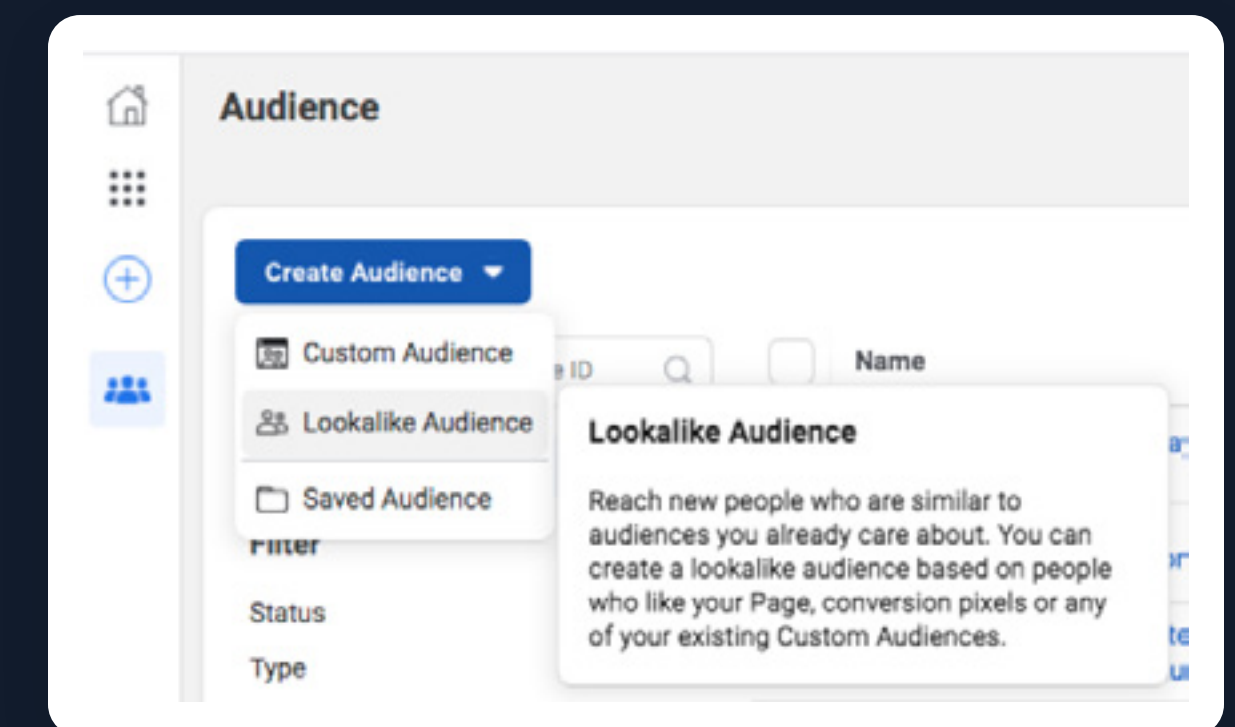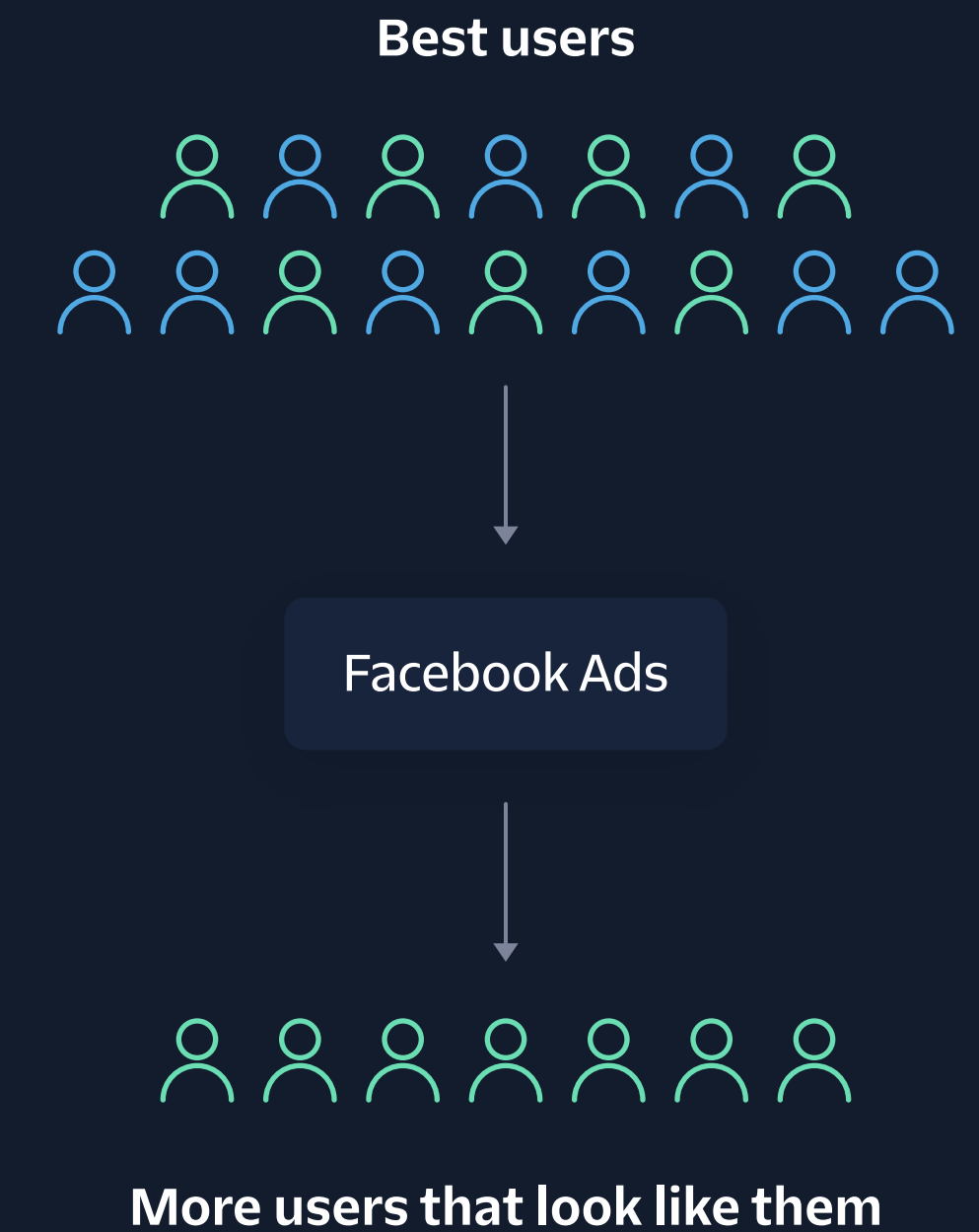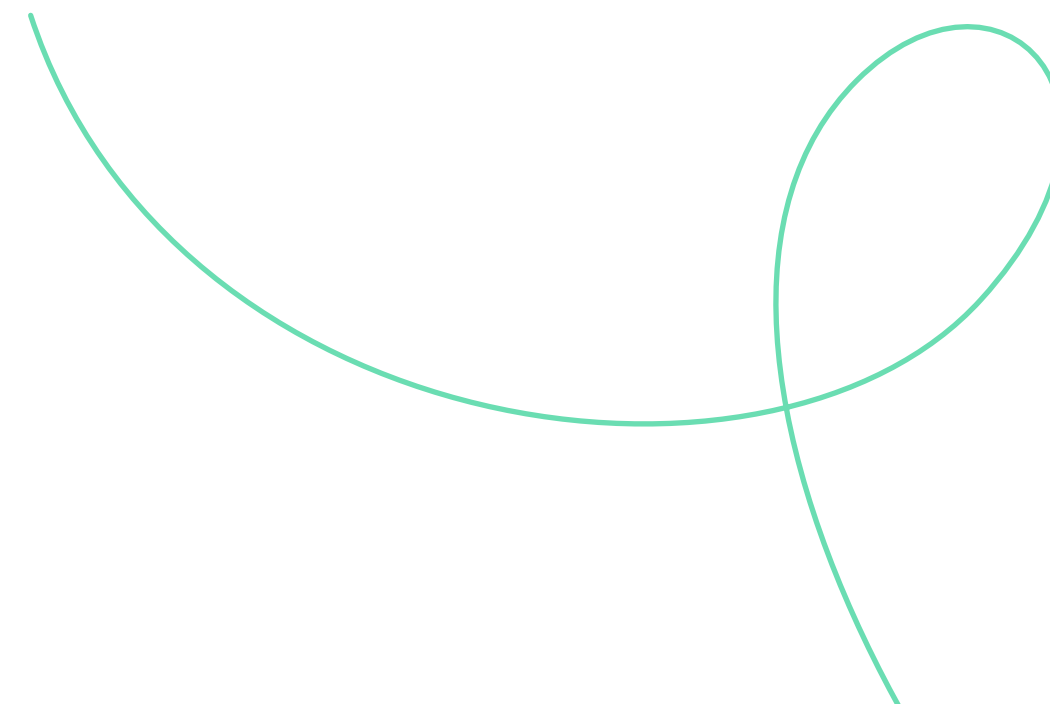
Real-Time Activation

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 increased campaign ROI through the following use cases and strategies.

Pomelo.

Case Study 4
Pomelo Personalized Recommendations at Scale

USE CASE	• Data powered performance marketing
	• Data powered digital customer experiences
INDUSTRY	Retail
HEADQUARTERS	Bangkok, Thailand
REGION	APAC
PRODUCTS	• Connections
	• Twilio Engage

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 Twilio 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 Twilio 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**
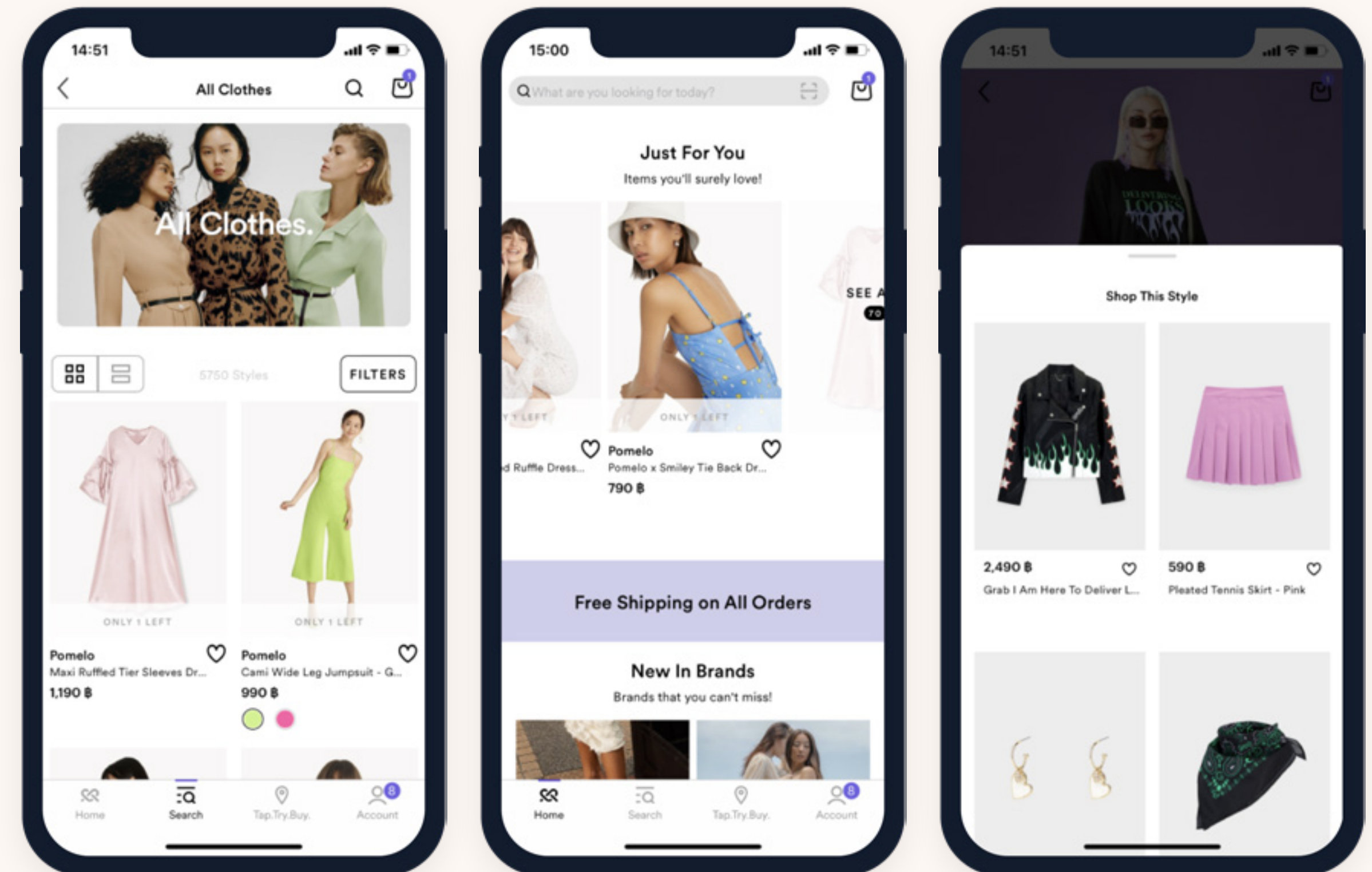
Activation Strategy 4

How to Implement Twilio 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. Twilio Segment and Amazon Personalize can now deliver these experiences without such resources.

With Amazon Personalize and Twilio Segment, you can power the models Amazon has perfected over the years with your Twilio 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 Twilio 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 personalized 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.

Read the step-by-step instructions here

Product View

Order Complete

Recommended Products

```
[dark-denim-top, yellow-wool-
jumper, olive-green-jacket]
blue-silk-tuxedo]
```

17
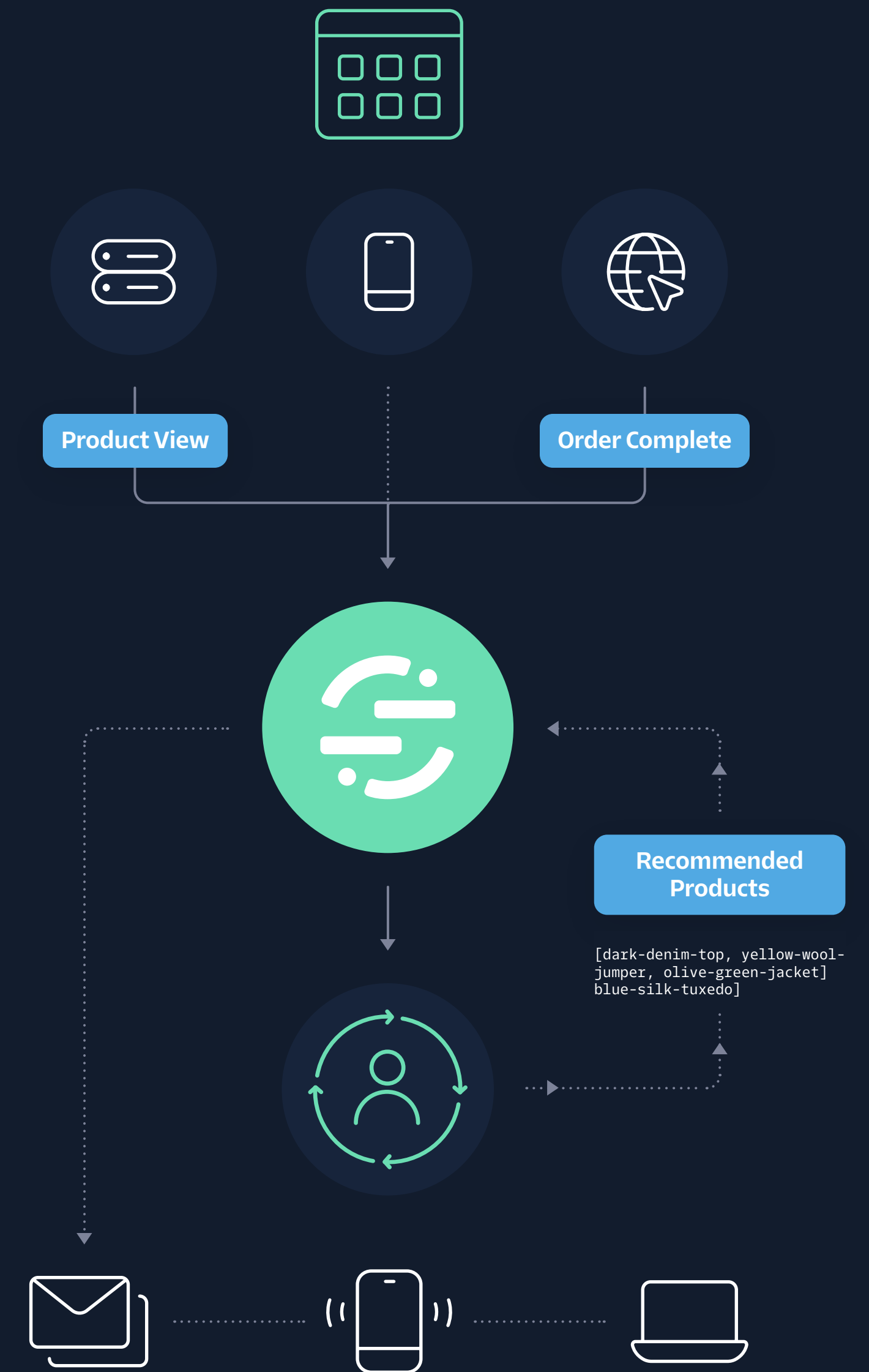
USE CASE	Data stack modernization
INDUSTRY	Retail
HEADQUARTERS	Copenhagen, Denmark
REGION	EMEA
PRODUCTS	• Connections • Twilio Engage

Case Study 5
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 Twilio Segment as their Customer Data Platform (CDP) and put it at the heart of their operations. They now use Twilio 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.
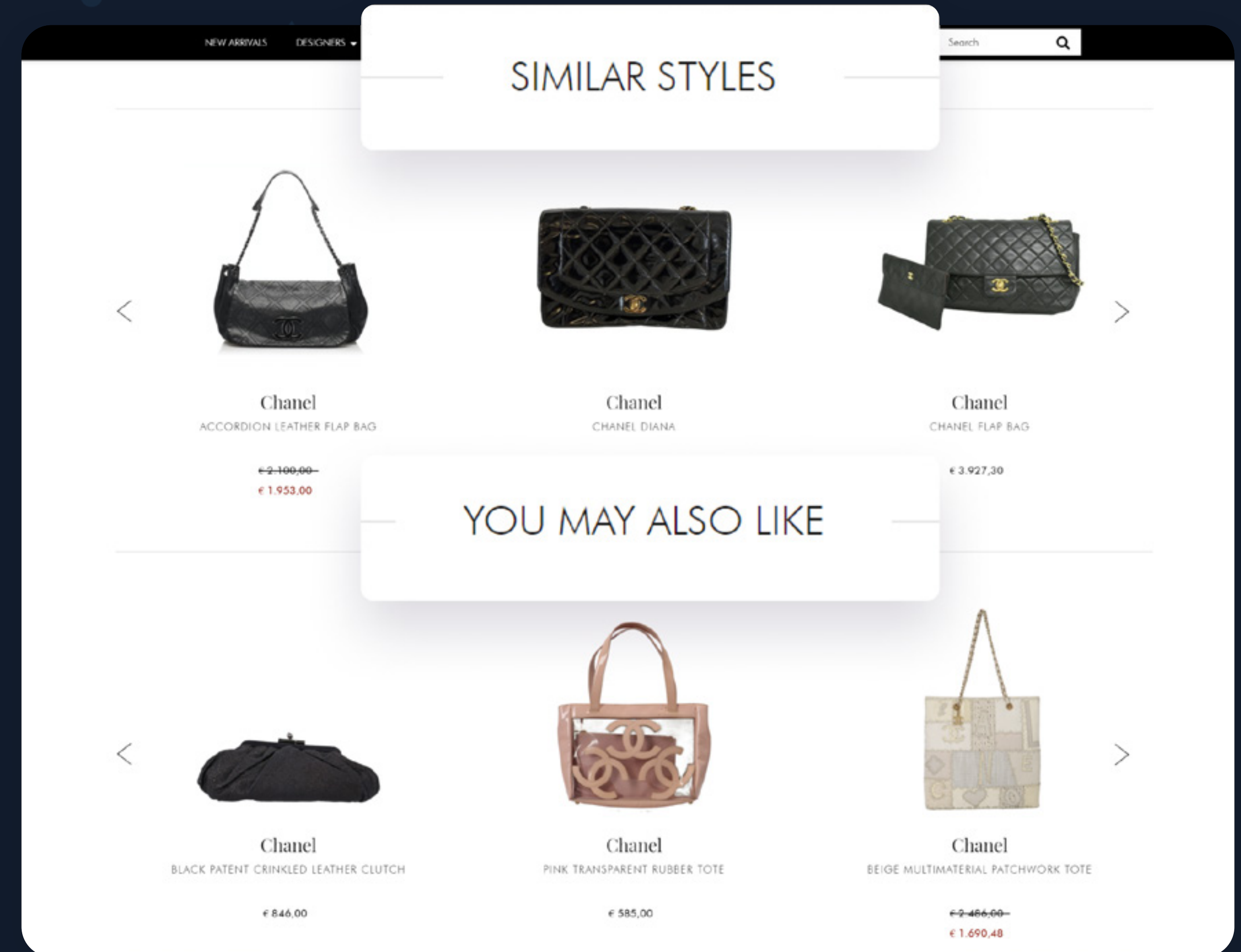
Read the full customer story here

"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 5

# 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 6
Veo Gains a Deeper Understanding of its Customers
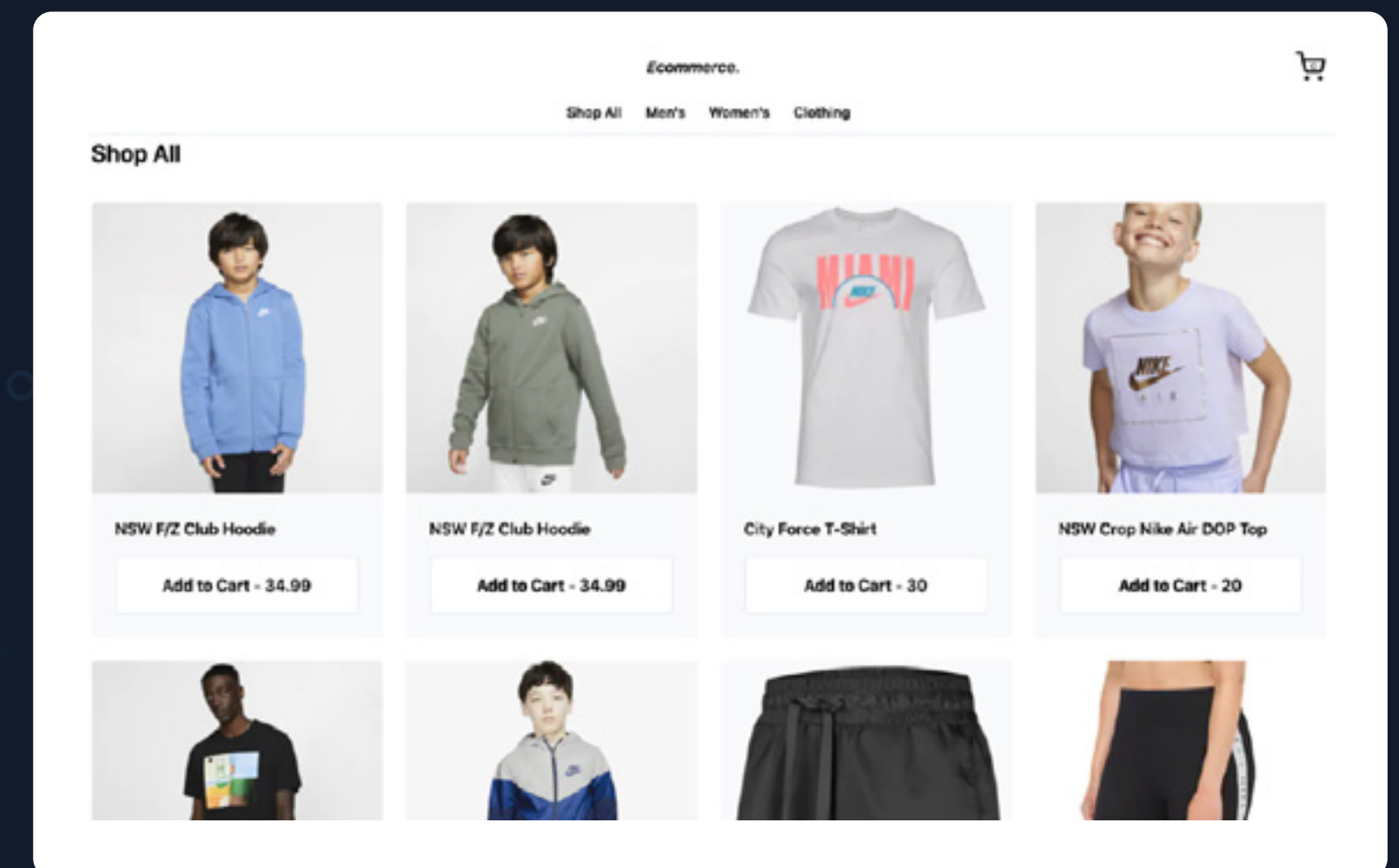
USE CASE
- Data powered performance marketing
- Data powered digital customer experiences
- Customer 360

INDUSTRY
B2B SaaS and Technology

HEADQUARTERS
Copenhagen, Denmark

REGION
EMEA

PRODUCTS
- Connections
- Functions
- Twilio Engage

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 6
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 Twilio 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

23
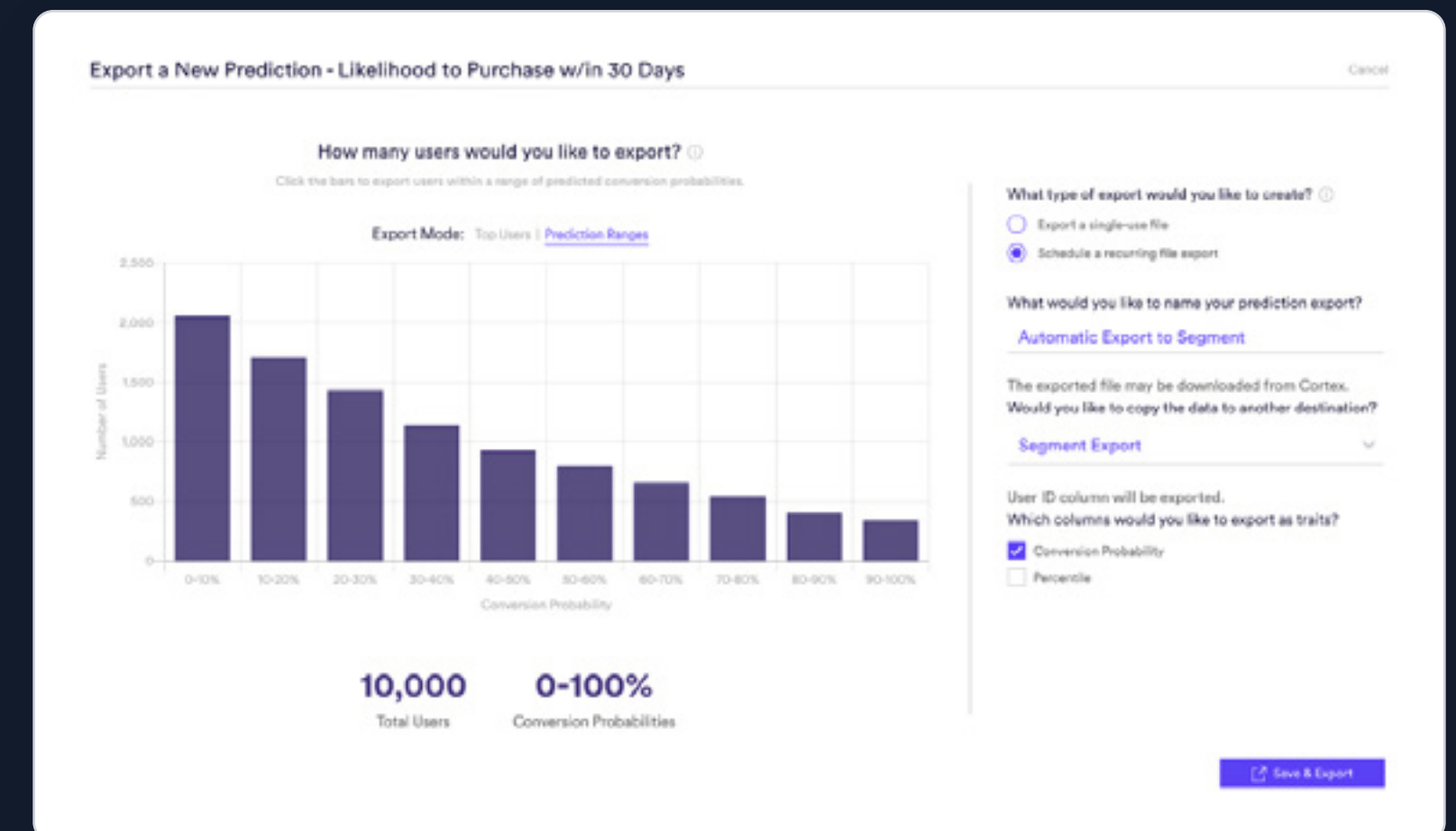
Retention

Most companies focus too much on acquiring new customers at the expense of retaining existing ones.

Yet 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, meanwhile, 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.

Allergan

USE CASE	Data powered digital customer experiences
INDUSTRY	Healthcare
HEADQUARTERS	Dublin, Ireland
REGION	EMEA
PRODUCTS	• Journeys • Protocols • Connections • Twilio Engage • rETL

Case Study 7
Allergan Personalized Their Loyalty Program

Challenge
Allergan used to spend most of their time building relationships with doctors instead of with the consumers of their products. While they did have a loyalty program with 6 million customers, their marketers needed to use SQL to leverage this data for campaigns and special offers.

Solution
Allergan rerouted customer data from all their sources–loyalty program, branded and non-branded websites, digital and social ads–through Twilio 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 Twilio 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 Twilio Segment made available to us."

Tory Brady

Associate Vice President, Product, Engineering & Data, **Allergan Data Labs**

Intelligent Customer Engagement

Machine Learning
Customer 360°

Personalized
Communications

Allē Loyalty Program
- Web
- Mobile

Branded Websites
- Botox
- Juviderm
- Latisse
- More

Ads
- Facebook
- Instagram
- Google
- Marketing landing pages

Personalized Experiences
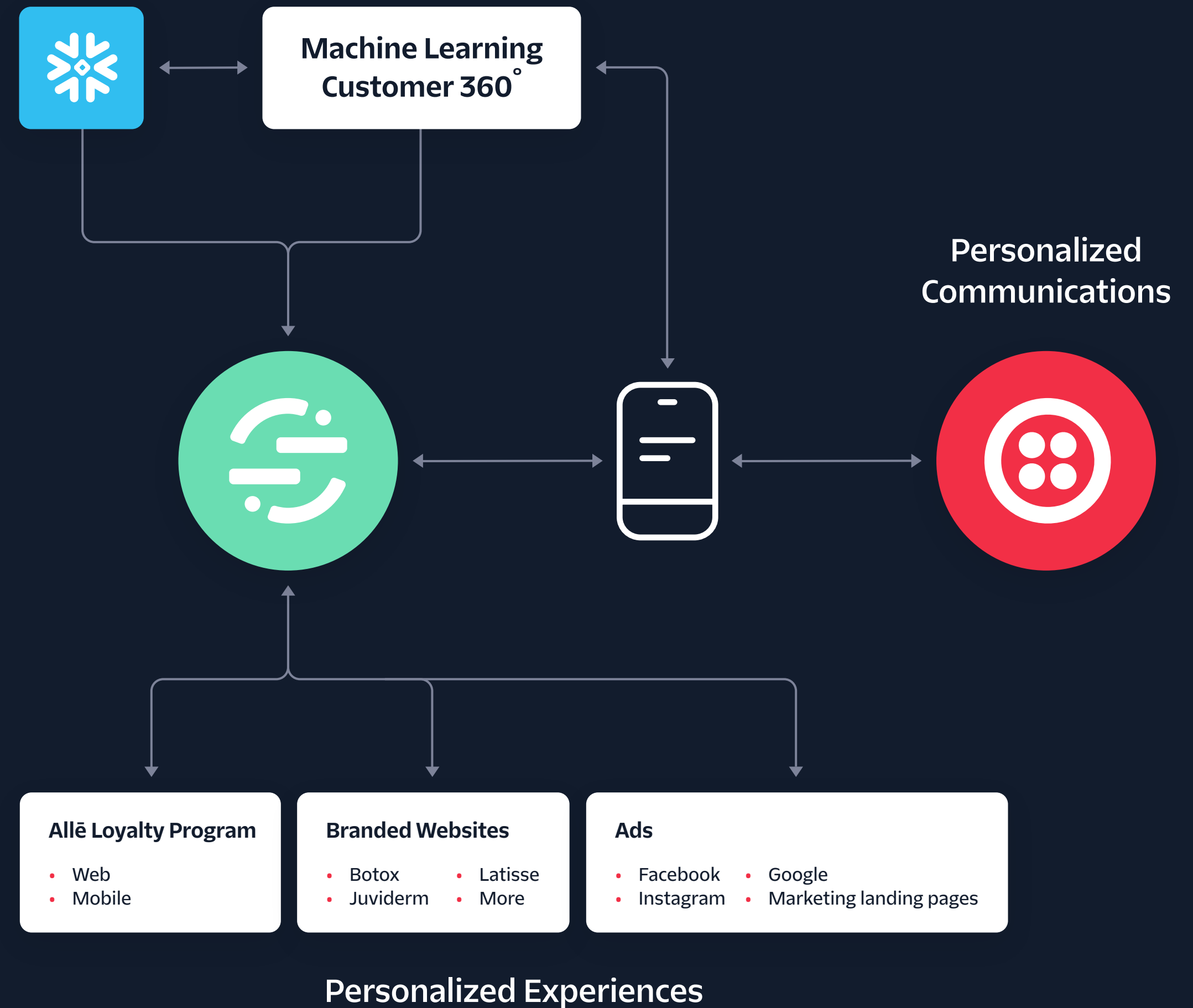
Retention Strategy 7
Build a Loyalty Program for High-Value Customers Through SMS and Email

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

BONOBOS

Case Study 8
Bonobos Personalized In-Store Shopping Through Online Ads
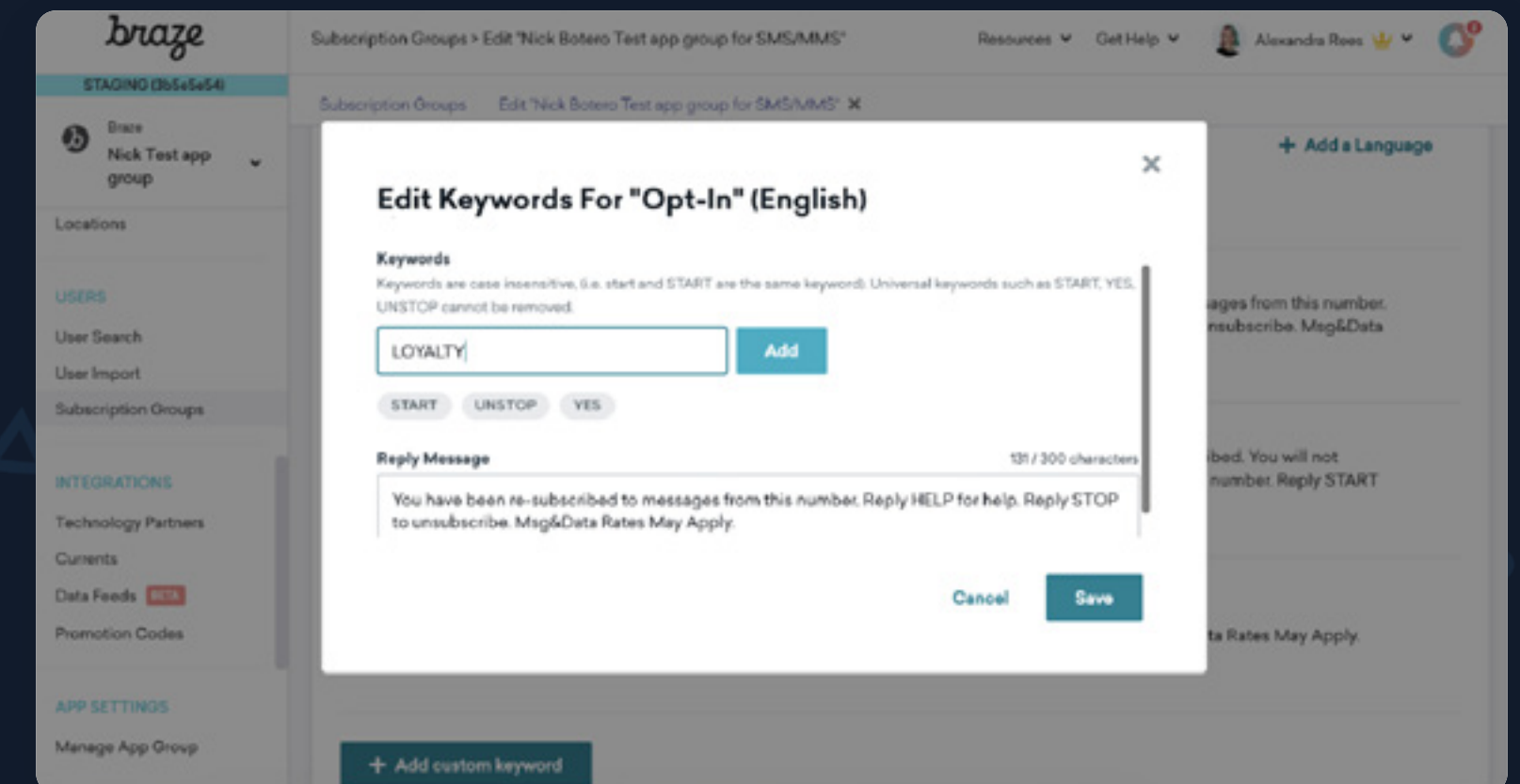
USE CASE	Data powered performance marketing
INDUSTRY	Retail
HEADQUARTERS	New York City, New York
REGION	NAMER
PRODUCTS	• Connections • Twilio Engage

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 Twilio 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 Twilio 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 8
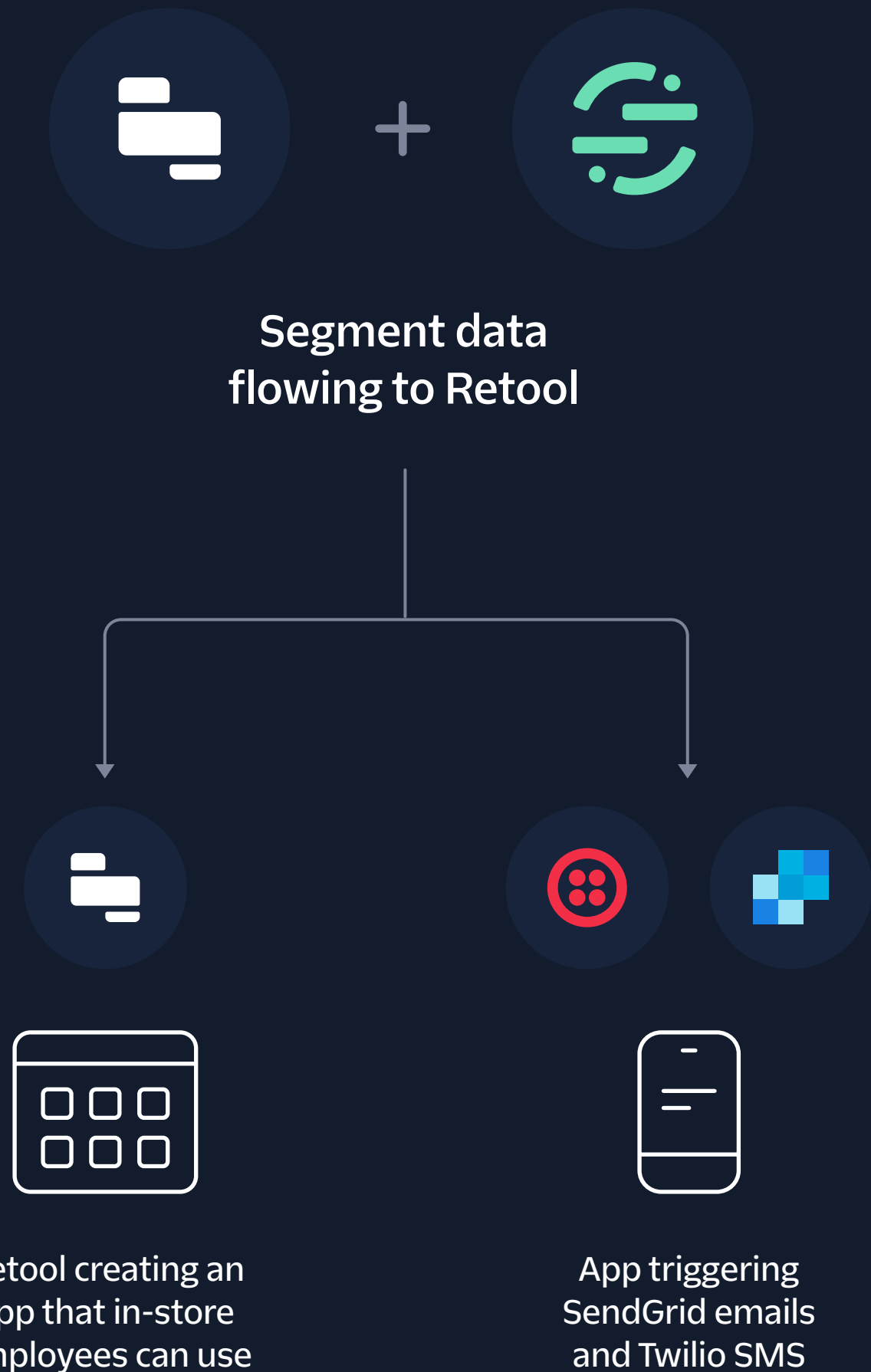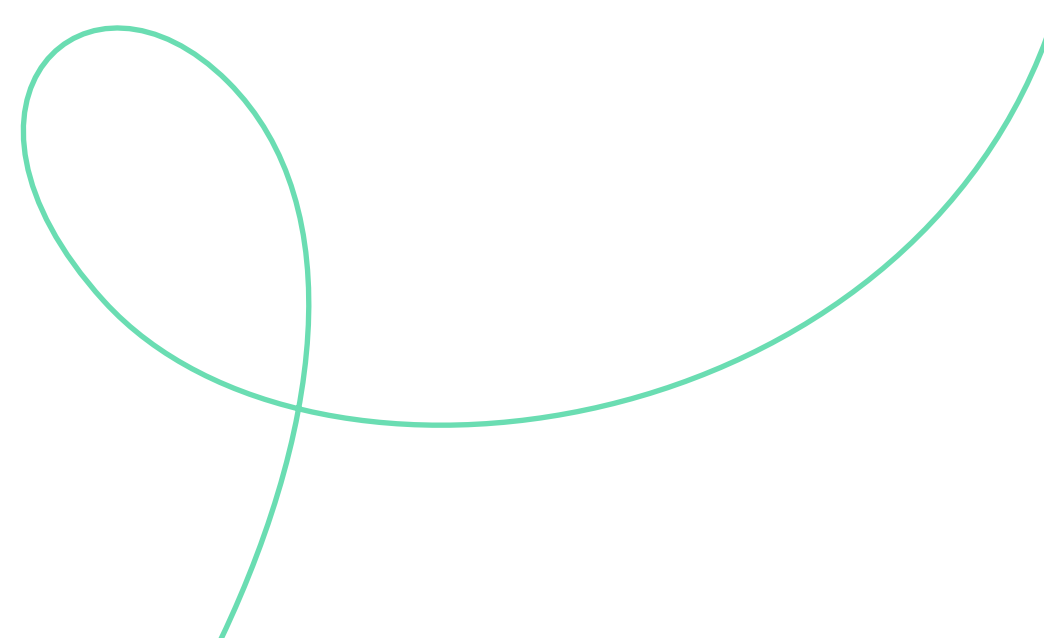# Personalize the In-Store Experience with an App for Your Sales Reps

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

Segment data flowing to Retool

Retool creating an app that in-store employees can use

App triggering SendGrid emails and Twilio SMS

Case Study 9

Skilling Personalizes to Increase Customer Retention

USE CASE	• Data powered performance marketing
	• Customer 360
INDUSTRY	• Financial Services and Insurance
	• B2B SaaS and Technology
HEADQUARTERS	Nicosia, Cyprus
REGION	EMEA
PRODUCTS	• Functions
	• Connections
	• Twilio Engage

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 Twilio 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 Twilio 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

31

"Twilio 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 Twilio Segment."

Andrew Haigh
CTO, **Skilling**

Retention Strategy 9

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 Twilio 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.

Read the step-by-step instructions here

33

DAILY
HARVEST

Case Study 10
Daily Harvest Personalized 1:1 Customer Experiences
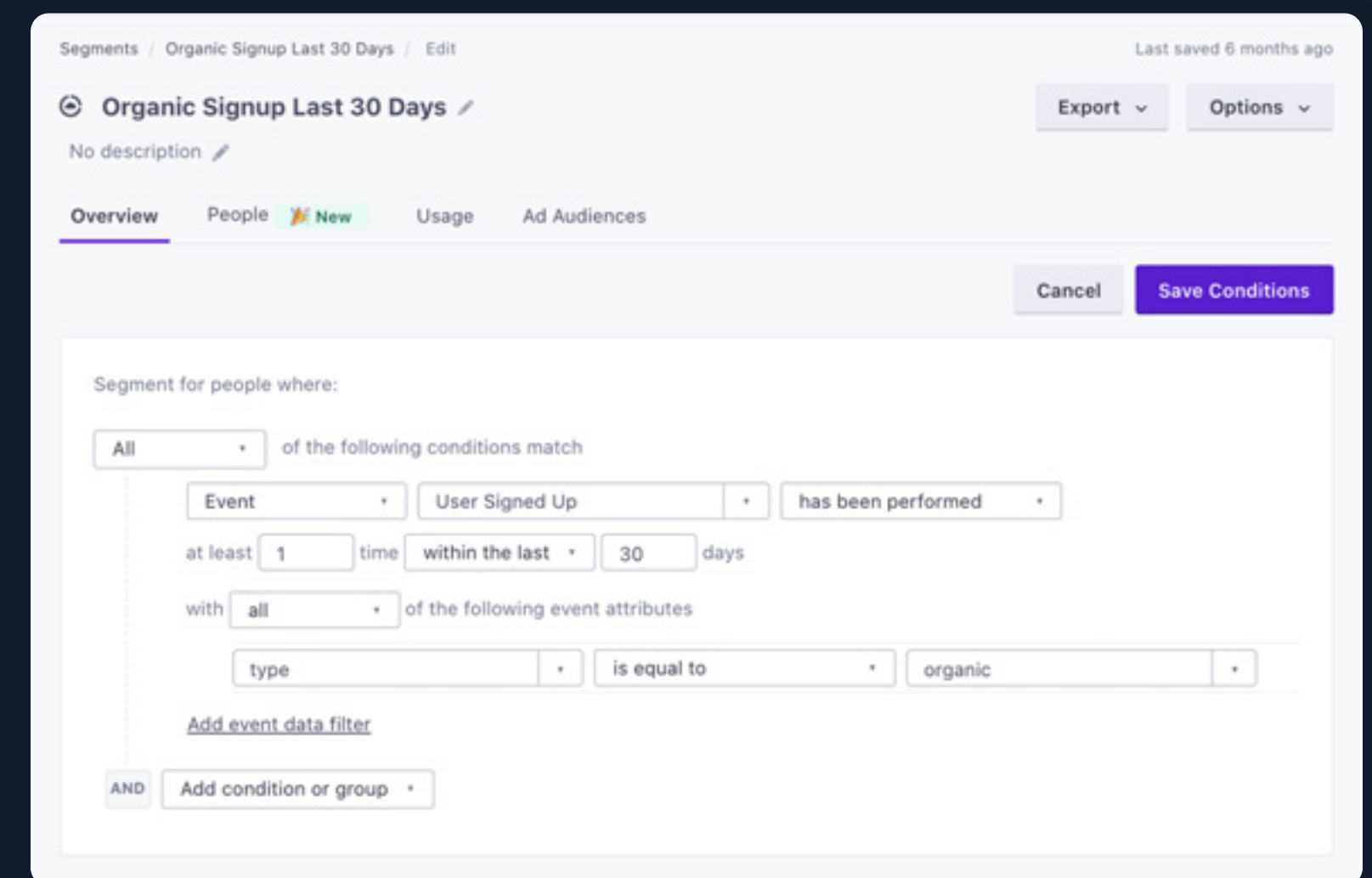
USE CASE	• Customer insights and analytics
	• Customer data infrastructure
INDUSTRY	Consumer Goods and Services
HEADQUARTERS	New York City, New York
REGION	NAMER
PRODUCTS	Connections

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. Twilio 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. Twilio 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 10
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 Twilio 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

Set up data tracking on your app

Deploy

Connect Braze Destination with Segment Personas

Create a computed trait in Personas

Create a cross-channel campaign in Braze

Target users

Start Winning with Personalization Today

We hope these use 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 Twilio 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

38

Recommended Reading

The Customer Data Platform Report 2024

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>

7 Ways to Use AI to Superpower Your Marketing Strategy

This guide explores how AI-driven marketing can revolutionize customer interactions, loyalty programs, and personalized recommendations, paving the way for smarter and more efficient customer engagement.

Download the guide>

Customer Acquisition Cost (CAC): A Guide for 2024

This guide shares the CAC formula and explains 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>

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