

Elevate Your Email Game with Marketo Email Personalization

A start to finish guide

ARE YOU READY FOR PERSONALIZATION?

Today's Agenda



What is Personalization?



Why use Personalization?



How can I use Personalization in Email (more than just first name)



Demo Examples

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Your Speakers



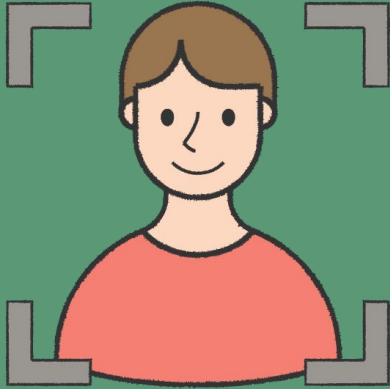
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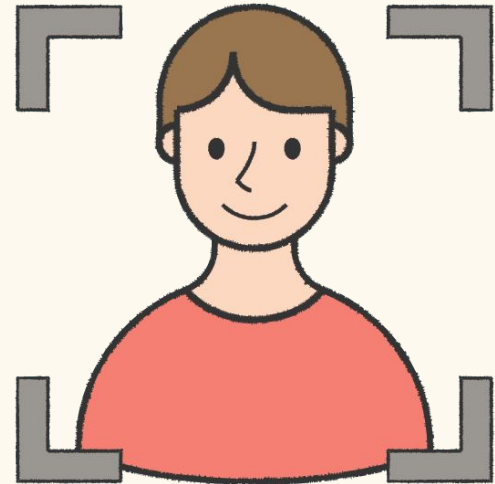


01 What Is Personalization

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What is Personalization?

Personalization is the practice of customizing marketing efforts and messages to suit the individual preferences, behaviors, and characteristics of each target audience or even individual customer. It involves using data-driven insights to deliver highly relevant and targeted content.

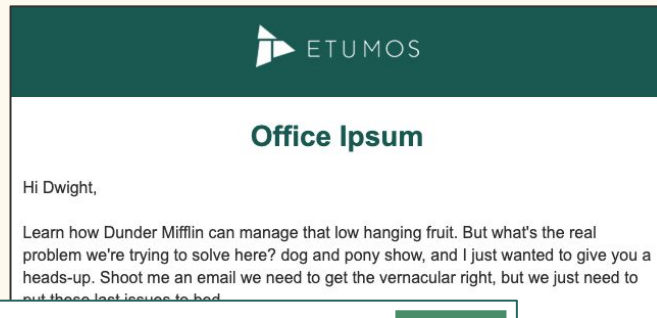
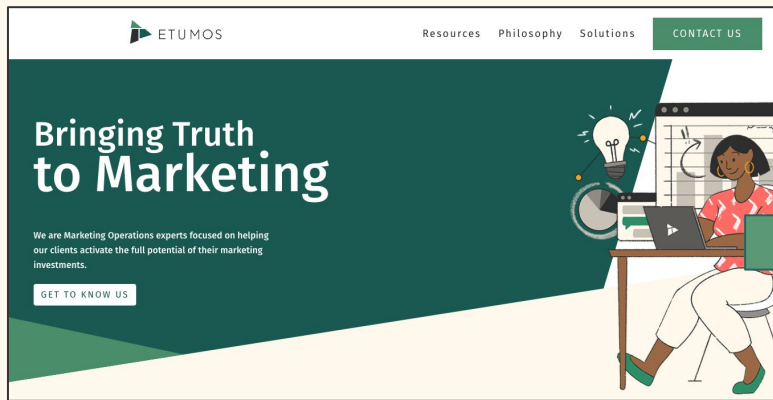


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Where can I personalize with Marketo?

Marketo allows personalization for assets such as:

- Email
- Landing Pages
- Web pages
- Dynamic Chat





02 Getting Started

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How do I get started!?

Before any personalization work is done, you need to check your existing data!

Not auditing your data can lead to a bad customer experience if they receive an email with a misspelled name or irrelevant information!

Audit your database against the fields you are looking to utilize for personalization:

- First Name and Last Name
- Company Name
- Country
- Language

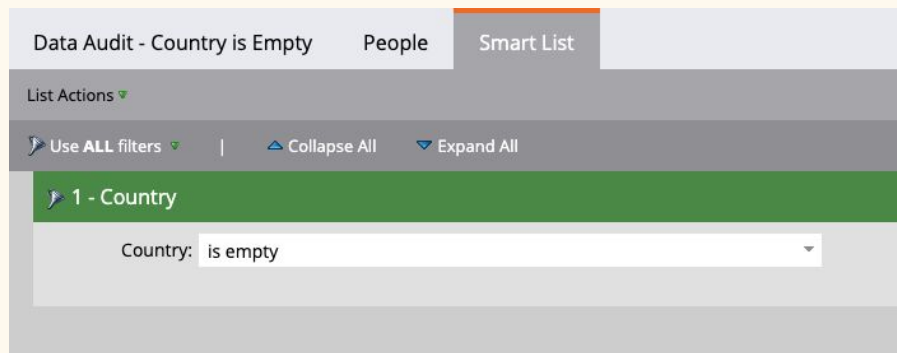
EXAMPLE: First Name Value Audit

- How many blanks?
- Incorrect spellings?
- Missing capitalization?

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How to audit your data

1. Create smart lists that fit the criteria you will be utilizing
 - a. First Name is empty
 - b. Country is empty
 - c. [Segmentation] is Default
2. Identify total record counts for who fits different categories as well as potential errors/gaps in data.
3. To dig deeper into your data, export to pivot tables



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Ensure you have clean data to begin with

When importing data, make sure you always leads with clean data!

- Are all required fields populated?
- Are all first and last names proper cased?
- Are all emails formatted correctly, with an @ symbol and a .com or equivalent?
- Are there any duplicate emails listed?
- Are all state and country values abbreviated/spelled correctly?
- Are all telephone numbers formatted uniformly?
- Are all industry values validated against accepted values?
- Has an opt-in value been provided for all records?



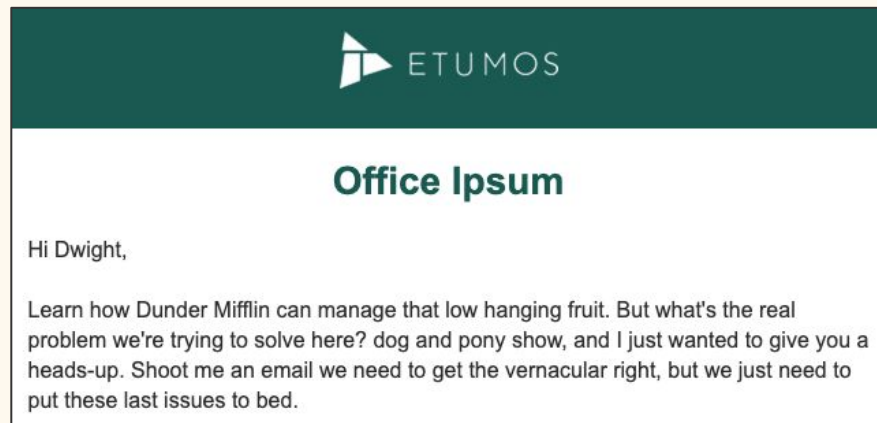
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Where to start?

Where should I start first with personalization?

The simple answer is email. This can be instituted quickly and depending on the personalization you are doing, can be a good pilot run for personalization.

Personalization for web pages or landing pages, while beneficial, takes a lot more work and testing to ensure proper personalization occurs.





03 Impact of Personalization

Why bother with personalization?

- Potential reduction in unsubscribe rates:
 - Personalized email campaigns can reduce unsubscribe rates by 28% - MailChimp
- Increased open rates
 - Personalized email subject lines generate 50% higher open rates compared to non-personalized ones - Campaign Monitor
- Higher Click-Through rates (CTR):
 - Emails with personalized subject lines are 26% more likely to be opened, and personalized emails improve click-through rates by an average of 14% and conversions by 10% - Experian

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Personalization is not just [First Name]

You can do more than just adding first name to personalize an email!

- Subject lines
- Email headers
- Email copy
- CTAs
- And more!

Utilize in Marketo

- Tokens
- Email script
- Dynamic content



04 Personalization Ideas

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Example 1 - Tokens

Team Etumos

Ever had a `{{lead.First Name:default=whoops!}}` kind of day? 🤦 - We've all been there...

Hi `{{lead.First Name:default=there}},`

Learn how `{{company.Company Name:default=your company}}` can manage that low hanging fruit. But what's the real problem we're trying to solve here? dog and pony show, and I just want to get the vernacular right.

Hi Dwight,

Learn how `Dunder Mifflin` can manage that low hanging fruit. But what's the real problem we're trying to solve here? dog and pony show, and I just wanted to give you a heads-up. Shoot me an email we need to get the vernacular right, but we just need to put these last issues to bed.

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Tokens 101

Person Tokens









Person Tokens leverage a person or company attribute such as lead Tokens and company Tokens.

Program Member Tokens

Member Tokens insert unique values from integrated service partners.

Date Token reflects its name, it holds a date but can only be formatted as year, month day.

Email Script Tokens require Velocity scripting language knowledge and pull from Custom Objects, API Calls, and Custom fields.

Token Type
Calendar File 
Date 
Email Script 
Number 
Rich Text 
Score 
SFDC Campaign 
Text 

Example 2 - Email script

Edit Script Token

```
1 #if(${lead.Segmentation_GeoLanguage} == "German")
2 Wir sollten uns zu einem Gespräch treffen:<br>
3 <br>
4 • die Einzelheiten des nächsten Treffens<br>
5 • Unternehmenssynergien <br>
6 • der ultimative Maßstab für Erfolg <br>
7 <br>
8 #elseif(${lead.Segmentation_GeoLanguage} == "Spanish")
9 Nosotras deberíamos tener una reunión para discutir
10 <br>
11 <br>
12 • los detalles de la próxima reunión <br>
13 • sinergia corporativa <br>
14 • la medida definitiva del éxito <br>
15 <br>
16 #else
17 we should have a meeting to discuss:
18 <br>
19 <br>
20 • the details of the next meeting <br>
21 • corporate synergy <br>
22 • the ultimate measure of success <br>
23 <br>
24 #end
25
```

Office Ipsum

Wir sollten uns zu einem Gespräch treffen:

- die Einzelheiten des nächsten Treffens
- Unternehmenssynergien
- der ultimative Maßstab für Erfolg

oficina ipsum

Nosotras deberíamos tener una reunión para discutir

- los detalles de la próxima reunión
- sinergia corporativa
- la medida definitiva del éxito

Office Ipsum

we should have a meeting to discuss:

- the details of the next meeting
- corporate synergy
- the ultimate measure of success

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Example 3 - Dynamic Content

Can't see images? [View as Web Page!](#)

Office Ipsum

We've got to manage that low hanging fruit but what's the real problem we're trying to solve here? dog and pony show, and I just wanted to give you a heads-up. Shoot me an email we need to get the vernacular right, but we just need to put these last issues to bed.

Rock Star/Ninja disband the squad but rehydrate as needed, yet marketing, illustration. Per my previous email.

Big data lift and shift. Going forward. Sorry i didn't get your email prepare yourself to swim with the sharks we need to future-proof this collaboration through advanced technology, nor we don't want to boil the ocean technologically savvy, but that jerk from finance really threw me under the bus.

Content Modules

All **Dynamic**

- Dynamic
 - GeoLanguage
 - English
 - Spanish
 - Default
 - Headline
 - Text

Can't see images? [View as Web Page!](#)

oficina ipsum

Tenemos que gestionar esa fruta madura, pero ¿cuál es el verdadero problema que estamos tratando de resolver aquí? exposición de perros y ponis, y sólo quería avisarte. Envíame un correo electrónico, necesitamos entender bien la lengua vernácula, pero solo tenemos que dejar de lado estos últimos problemas.

Rock Star/Ninja disuelven el equipo pero se rehidratan según sea necesario, pero marketing, ilustración. Según mi correo electrónico anterior.

Elevación y cambio de big data. Avanzando. Lo siento, no recibí tu correo electrónico, prepárate para nadar con los tiburones que necesitamos para preparar esta colaboración para el futuro a través de tecnología avanzada, ni tampoco queremos hervir el océano con conocimientos tecnológicos, pero ese idiota de las finanzas realmente me puso nervioso. autobús.

Content Modules

All **Dynamic**

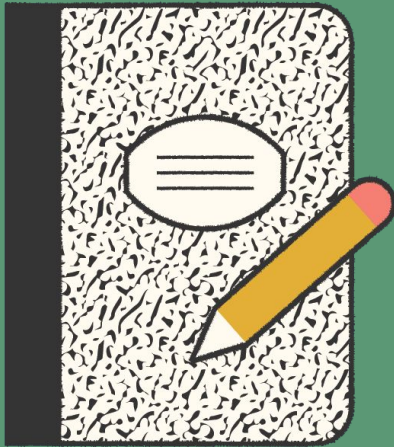
- Dynamic
 - GeoLanguage
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Example 3 - Dynamic Content (Segment Set Up)

The screenshot shows the Adobe Marketo Engage interface with the 'Database' tab selected in the top navigation bar. The left sidebar displays a tree view of the database structure, including folders for '01 - Global', '02 - Framework', '03 - Staging', and '04 - Training'. Under '04 - Training', there are sub-folders for 'System Smart Lists', 'Group Smart Lists', 'Group Lists', 'Segmentations', 'Employees', 'Geographical', and 'GeoLanguage'. The 'GeoLanguage' folder is expanded, showing 'Approved' with sub-items 'Default', 'English', and 'Spanish'. The main content area shows the 'Spanish' segment selected, with options to 'View members of this segment' and 'Find people'. Below this, the 'Smart List' section is visible, with the option to 'Define membership rules for this Segment'.

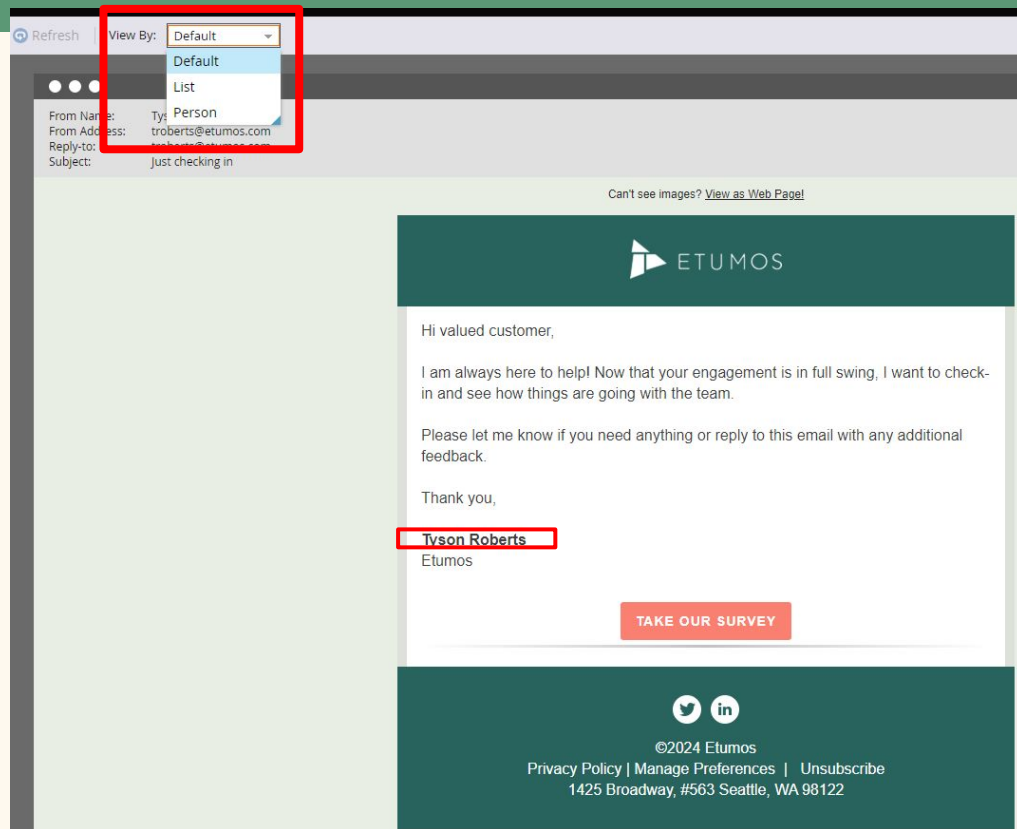
The screenshot shows the Adobe Marketo Engage interface with the 'Smart List' tab selected in the top navigation bar. The left sidebar displays a tree view of the database structure, similar to the previous screenshot. The main content area shows the 'Smart List' section selected, with options to 'Define membership rules for this Segment'. Below this, the 'Smart List' section is visible, with the option to 'Define membership rules for this Segment'. The right sidebar shows a list of segments, including '1 - Country' with the rule 'Country is "US,CA,AU,GB,NZ"'. The 'Smart List' tab is highlighted in the top navigation bar.



05 Wrap Up

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How To Test



1. Click on Email & Click “Preview”
2. Select List of Person
3. Watch Personalization piece change (Ex. Tyson changes to Dan)

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Key Takeaways

- Check your existing data
- Start small - start with email
- There are more ways to personalize than just adding [First Name].
- Fully test before your first send!

Resources

- [Marketing and Sales Data Standardization: Best Practices for Scrubbing Your Database and Lists](#)
- [Marketo Tokens to Streamline Campaign Production](#)
- Cited Statistic Sources
 - [Campaign Monitor - Email Marketing Benchmarks 2022](#)
 - [Email Marketing Benchmarks - MailChimp](#)
 - [Data behind personalization - Experian](#)



Questions?