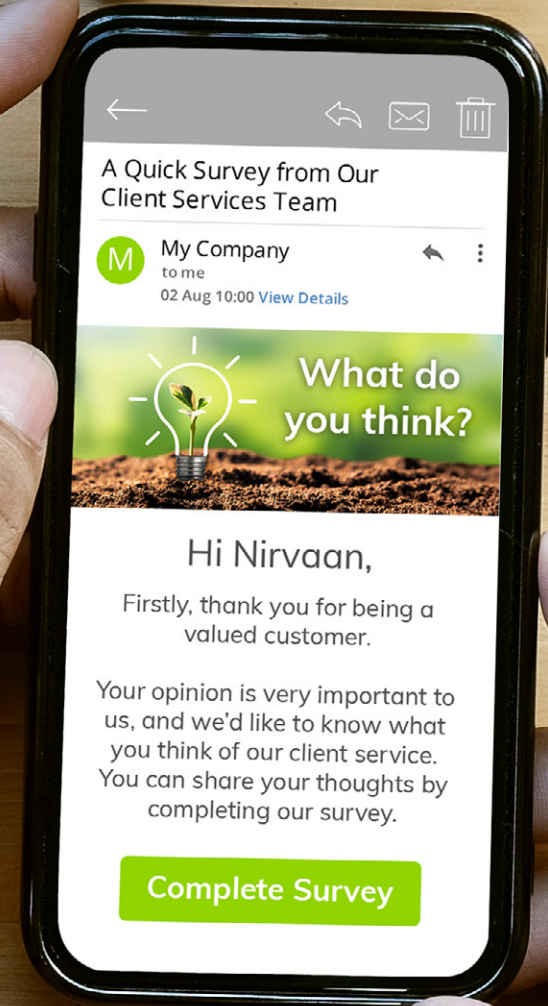




The Step-by-Step Guide to Message Personalisation

Achievable Personalisation
Steps to Improve the
Customer Experience



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Introduction

Year after year, message personalisation shows up in bulk communication trends thanks to its ability to improve the customer experience. We know customers expect a personalised experience and the stats prove that brands who use it outperform those who don't.

But even though personalisation has become a necessity in marketing and communication, there are still many brands that aren't using it effectively. This isn't necessarily because they're opposed to personalisation or that they aren't aware of the benefits – it's because they're overwhelmed by it. It's simply too big and complex a topic to know where to start.

This is why we created this guide. To finally simplify personalisation, so all communication professionals know what it is, know why to use it, and can develop their brands' personalisation capacity one step at a time.

Visit us at www.everlytic.com or [click here](#) to schedule a chat.



What is Message Personalisation?

Message personalisation relates to the tools, tactics, and strategies you can use to make your messages more personal to the reader. It can start at its most basic level, like the style and tone of your writing, and progress to the technical ways you can automate adding personalisation to bulk messages.

If you use a bulk communication platform, your ability to personalise messages at scale depends on the data you collect on your clients and subscribers. The more relevant information you have on them, the more customised you can make the experience.

The common technical tools and tactics you can use to personalise your messages include:



Segmenting your database

into smaller, more targeted audiences and creating custom content for each of them.



Including personalisation tags

(like name, account number, location) in your content so the information is specific to the reader.



Using dynamic content

to customise different sections of an email, so different audiences only receive the sections relevant to them.

These will all be discussed in this guide. Enjoy!

Why Personalise?

There are many good reasons to personalise your messages.
Here are some of the stats:

Clients Expect It

72%

of consumers claim they will only engage with personalised messaging.
(SmarterHQ)

63%

of consumers see personalisation as a standard of service.
(RedPoint Global and Harris Poll)

It Boosts Engagement

74%

of marketers said that targeted messages and personalisation of emails improves customer engagement rates.
(Instapage)

46%

higher open rates are seen on segmented, personalised automated email messages compared to normal marketing messages.
(Instapage)

It Increases Sales

77%

of consumers have picked, recommended, or paid more for a brand that prioritises personalised service or experience.
(Zoominfo)

75%

of consumers are more likely to buy from a retailer that recognises them by name, recommends products or services based on past purchases, or knows their purchase history.
(Accenture)

Personalisation vs Automation

What's the Difference?

There's a lot of overlap between automation and personalisation in the bulk communication and email marketing space. This is our take on it:

Personalisation is a form of automation within a message. It enables you to program different sections of the message to be customised to a specific recipient based on the data that you have on them.

This is somewhat different to communication automation – a broader term for what we consider the automated triggering and sending of messages. It includes more than just personalisation within one email, but the customisation of entire communication journeys.

Technically, customising an automated communication journey based on recipient data is a broader form of personalisation too. But, for the sake of simplicity, we've split it.

Why Split the Two?

Many communication platforms don't distinguish between email personalisation and automation like we do. Their marketing guides clump everything together. But in our experience, we've found that this can be overwhelming – especially for people who are still learning.

To hold your hand through the process, we're building **a growth journey** that gets you there one step at a time, starting with the basics and building on prior learnings. This guide is a part of that journey and should play a role in giving you robust foundations for all your bulk communication, personalisation, and automation needs as you grow.

In this guide, we'll discuss personalisation specifically – meaning the ways you can personalise an individual message using different tools and tactics available in most bulk communication platforms.

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Learn more about the **Everlytic growth journey**.

How to Gather Personalisation Data

To personalise messages at scale, you need information on your recipients. The more useful data you collect on your contacts (like name, gender, location, interests), the more personalised your messages can be.

There are three main ways to collect this data:

1

Ask the Contact for It

This is the standard data-collection method, typically using a subscription form. But it doesn't need to be limited to an opt-in form. Other ways to collect data from contacts is via lead magnets, competitions, and update-your-profile campaigns.

2

Track Recipient Engagement

This is when you track how your contacts interact with your messages and collect that as data. This enables you to customise content based on what recipients have shown interest in before, improving the customer experience.

3

Integrate Across Systems

This pulls and pushes data from other sources, like your CRM or ecommerce platform. It simplifies your life by automating database updates and allows you to personalise messages with cross-system information.



Harness Hyper-Personalisation with Three Data-Collection Methods

Learn more about what collecting data using these methods can mean for your email personalisation.



Data Privacy & Personalisation

Personalisation requires recipient data. But that doesn't mean you can just collect whatever data you want. International data privacy laws require explicit consent for you to collect a person's data and even once you have this, many data privacy regulations will inhibit you from collecting more information than you need.

For instance, in [our 2020 POPIA webinar series](#), POPIA expert, Elizabeth de Stadler from [Novation Consulting](#), explained that personal data can only be collected if it's necessary and for a valuable purpose. The regulations will likely be similar in many other regions too, especially the GDPR, as POPIA and the GDPR are very similar.

See the [POPIA FAQs](#) from this series.

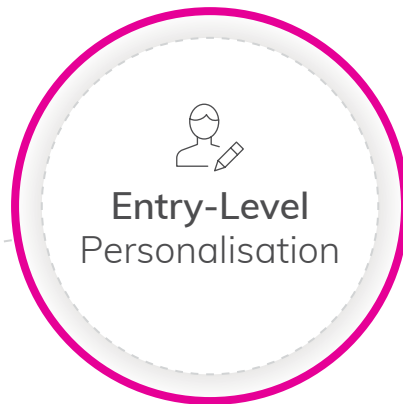


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How to Personalise Your Messages

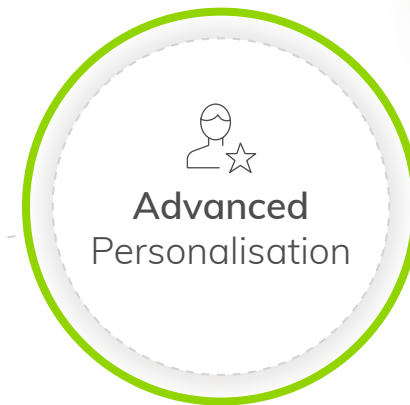
Message personalisation at scale is powerful but can be complicated for anyone learning the ropes. So, we've broken this section down by level of experience. Progress through these sections one at a time and test what works best, so you can grow your personalisation ability and improve your results as you go.



- a. Personalising email properties
- b. Greeting recipients by name
- c. Personalising message content
- d. How to do this in Everlytic



- a. Segmenting your database
- b. Segmenting with filters
- c. Segmenting with tags
- d. How to do this in Everlytic



- a. Using dynamic content
- b. Tracking & collecting data
- c. How to do this in Everlytic

How to Personalise Your Messages (cont.)

Entry-Level Personalisation

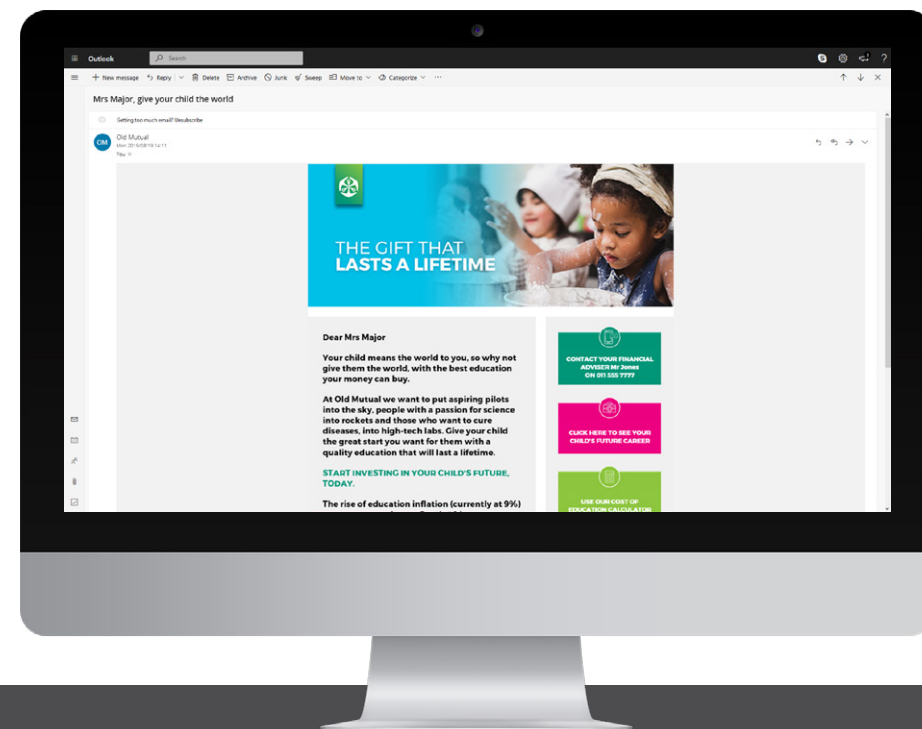
The first level of personalisation involves inserting personalisation tags into the places where you want to personalise specific information. All you need is the relevant data. Here are a few ways you can do this...

Personalising Email Properties

Emails with personalised subject lines **are 22% more likely to be opened**. When you use a platform that enables you to customise the preview text as well, this could potentially increase opens even more.

But the subject line isn't the only thing that can be personalised. In fact, you can be really strategic when personalising other email properties too. For instance, depending on your service provider, personalisation in your email properties can include:

- ✓ **Subject lines:** Include a person's name or personal information in the subject.
- ✓ **Email preview text:** Include a person's name or personal information in the preview text.
- ✓ **From name:** Customise who the email will come from. For instance, if each of your clients has an account manager and you've included this information in your data, you can make each client's email look like it came from their specific account manager.
- ✓ **From email address:** Customise the email address that the email will come from. This works much like the from name example. If each recipient has a custom contact email address that you'd like the email to come from, you can personalise it here.



Old Mutual's Hyper-Personalised Emails Get Benchmark-Beating Engagement

Old Mutual Personal Finance used personalised subject lines (and a variety of other personalisation tactics) to customise an email to their database. The results? They beat our average email benchmarks for both opens and clicks.

[Read the Case Study](#)

How to Personalise Your Messages (cont.)

Entry-Level Personalisation (cont.)

Greeting Recipients by Name

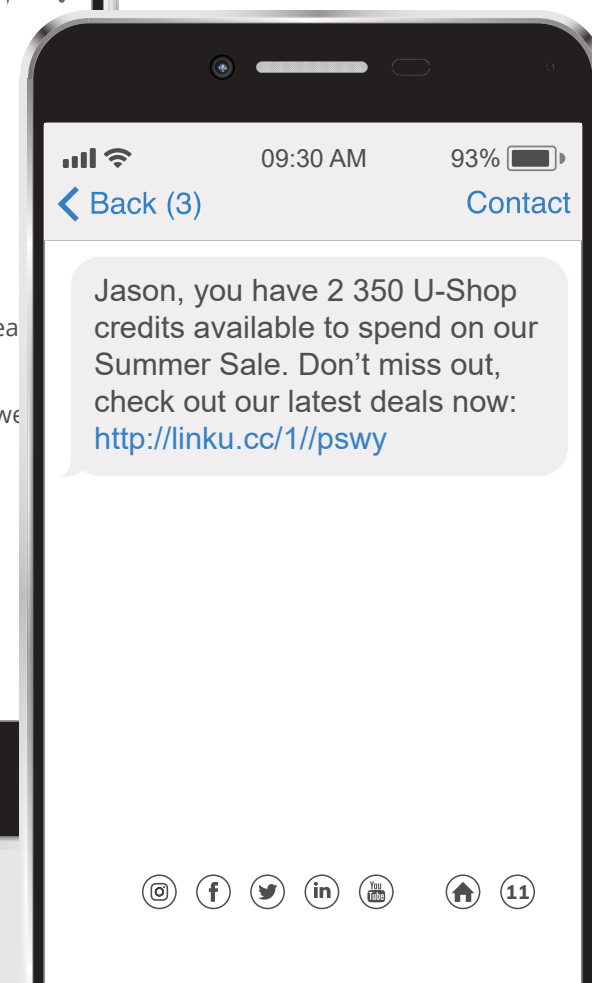
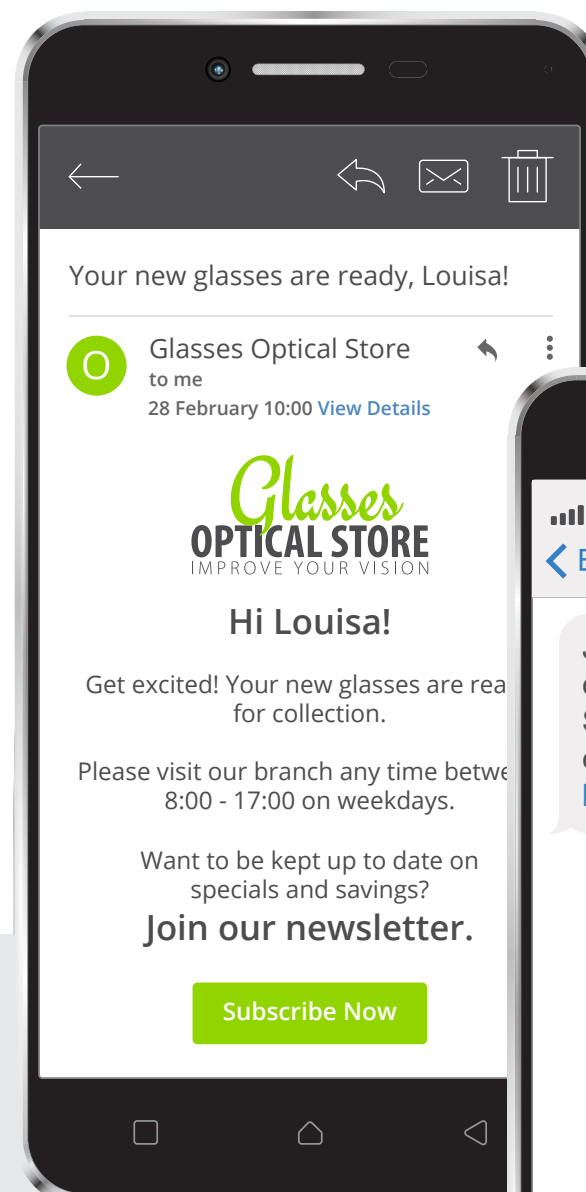
Greeting your recipients by name is another great way to get started with personalisation. It's a simple personalisation tactic, yes, but with some powerful psychological benefits.

For instance, according to [Marshall Connects](#), a business leadership coaching business, greeting people by name "is one of the most basic and influential social skills strategies, especially if your goal is to engage someone in conversation". [Positive Psychology News](#) also says that greeting by name embraces the three pathways to happiness: pleasure, engagement, and meaning.

In other words: greeting your recipients by name may be a simple and common personalisation tactic, but it's by no means frivolous. Even on a subconscious level, it creates personal connection and shows that they matter to your brand.

NB:

When using this form of personalisation in your emails, make sure your name data is accurate. You don't want to greet a person using a misspelled or incorrect name.



How to Personalise Your Messages (cont.)

Entry-Level Personalisation (cont.)

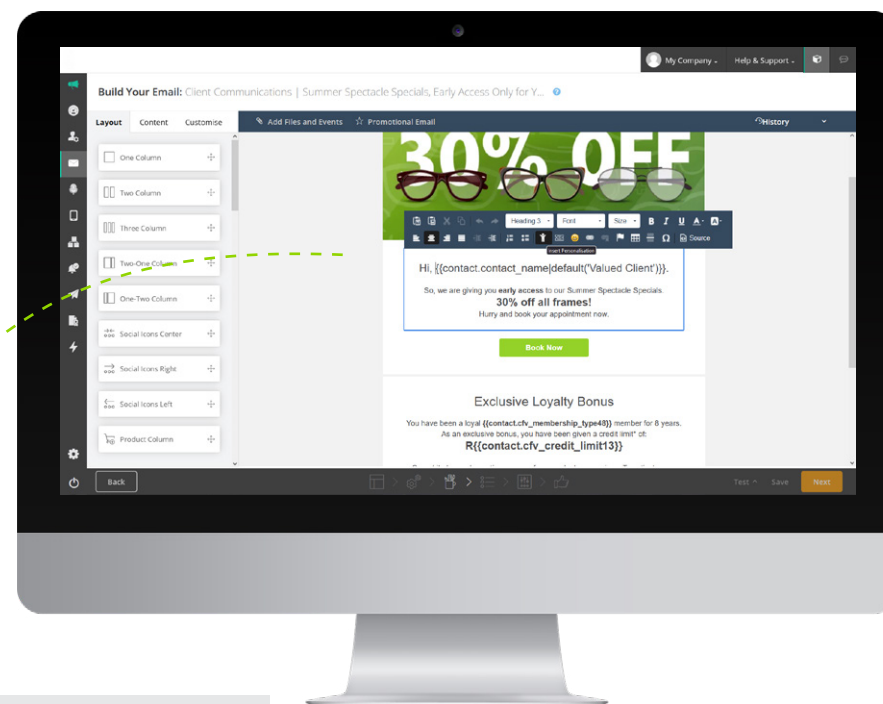
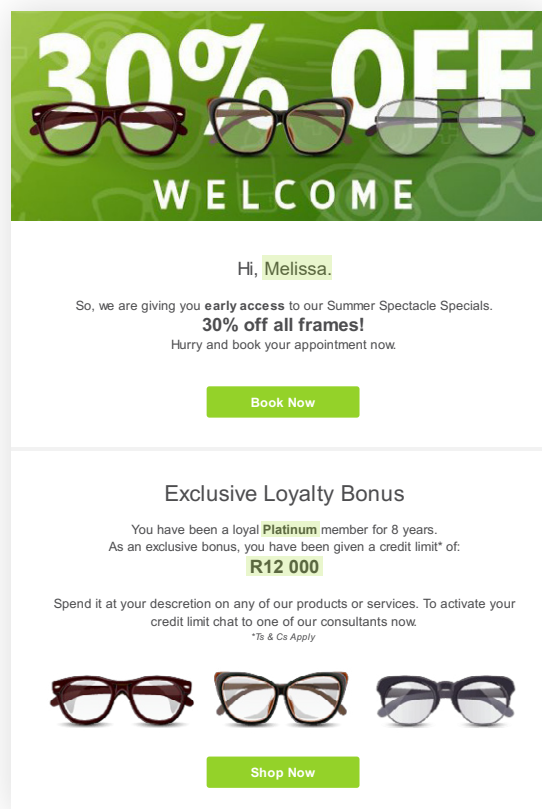
Personalising Message Content

Once your recipient is into the body of your message, you can use personalisation tags to customise any unit of data you're communicating about.

For instance, beyond greeting by name, you can include contact-specific data in your message, like:

- ✓ Account number
- ✓ Loyalty level
- ✓ City of residence
- ✓ Account manager
- ✓ Points balance

Use this to add value to the client, so they can relate to your message in the context of their own personal information.



How to Do This in Everlytic

The process for using personalisation tags in Everlytic is the same throughout the platform, whether you're sending emails, SMSs, voice broadcasts, or web push notifications.

Anywhere you can insert text that a recipient will see via a message, you can probably insert a personalisation tag. And it all starts with this personalisation icon.



If you're working in email properties or the body text of the message itself, to insert a personalisation tag, all you do is:

- ✓ Position your cursor where you'd like to insert the personalisation.
- ✓ Click on the personalisation icon.
- ✓ Select the data field that you'd like to personalise with.
- ✓ Provide a fallback option if this data is missing for any contacts (e.g.: "Hi you rock star" or "Hi there").
- ✓ Click Insert.

How to Personalise Your Messages (cont.)

Mid-Level Personalisation

Once you've mastered entry-level personalisation, you can progress to mid-level personalisation. This is where it starts to get really fun.

Sending Custom Content Using Database Segmentation

One of the main ways to personalise your message is to create relevant content for different audiences. Why? Because not all your clients will be interested in the same thing and even if you greet them by name or pull their data into the message, the message content itself may not be relevant to them.

The easiest way to do this is by segmenting your database into smaller groups using the data that you have. For instance, if you run region-specific deals and your database has data on where each contact is from, you can send different messages to people in different locations.

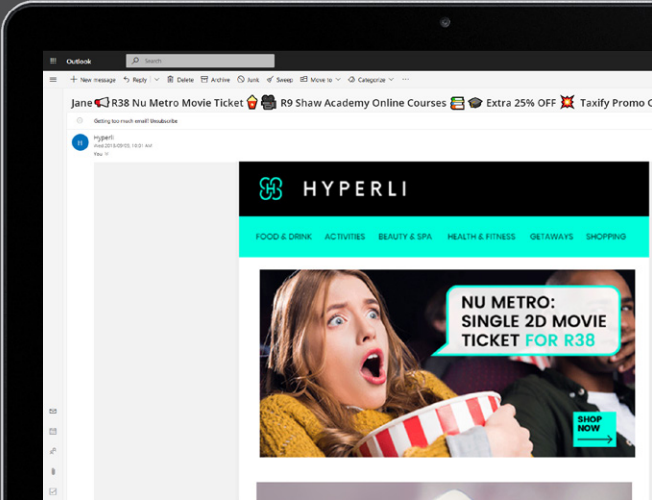
You can segment based on any information that you have. For example:

- **Demographics like:**

- | | | |
|---------------------|--------------------------|-----------------|
| ✓ Gender | ✓ Family size | ✓ Education |
| ✓ Age | ✓ Nationality | ✓ Homeownership |
| ✓ Income | ✓ Social economic status | ✓ Geolocation |
| ✓ Ethnic background | ✓ Occupation | |

- Stage of the sales funnel
- Loyalty programme level
- Participation in your events
- Content downloads
- How often they want to receive your content

Visit us at www.everlytic.com or [click here](#) to schedule a chat.



Hyperli Retains More Clients with List Segmentation

Hyperli successfully re-engaged stagnant clients by sending location-specific deals only to people in a particular region.

[See How They Did It](#)

How to Personalise Your Messages (cont.)

Mid-Level Personalisation (cont.)

How Do You Segment a Database?

We explored this topic in detail [on our blog](#), where we explained that there are two common ways to segment your database: using filters or tags.

Segmenting with Filters

Databases are typically stored in a format much like a spreadsheet. For every contact, there are multiple fields (columns) that store relevant data. For instance, you'd have fields for your contacts' email addresses, first names, etc.

You can filter your database on the data in any of these fields, sending messages to contacts that only have specific information. For example, you can create a filter to send a message to your silver loyalty club members only, excluding all contacts with 'bronze' or 'gold' in this field.

This should improve the silver recipients' interest and engagement with your message because the content is relevant to their specific loyalty level.

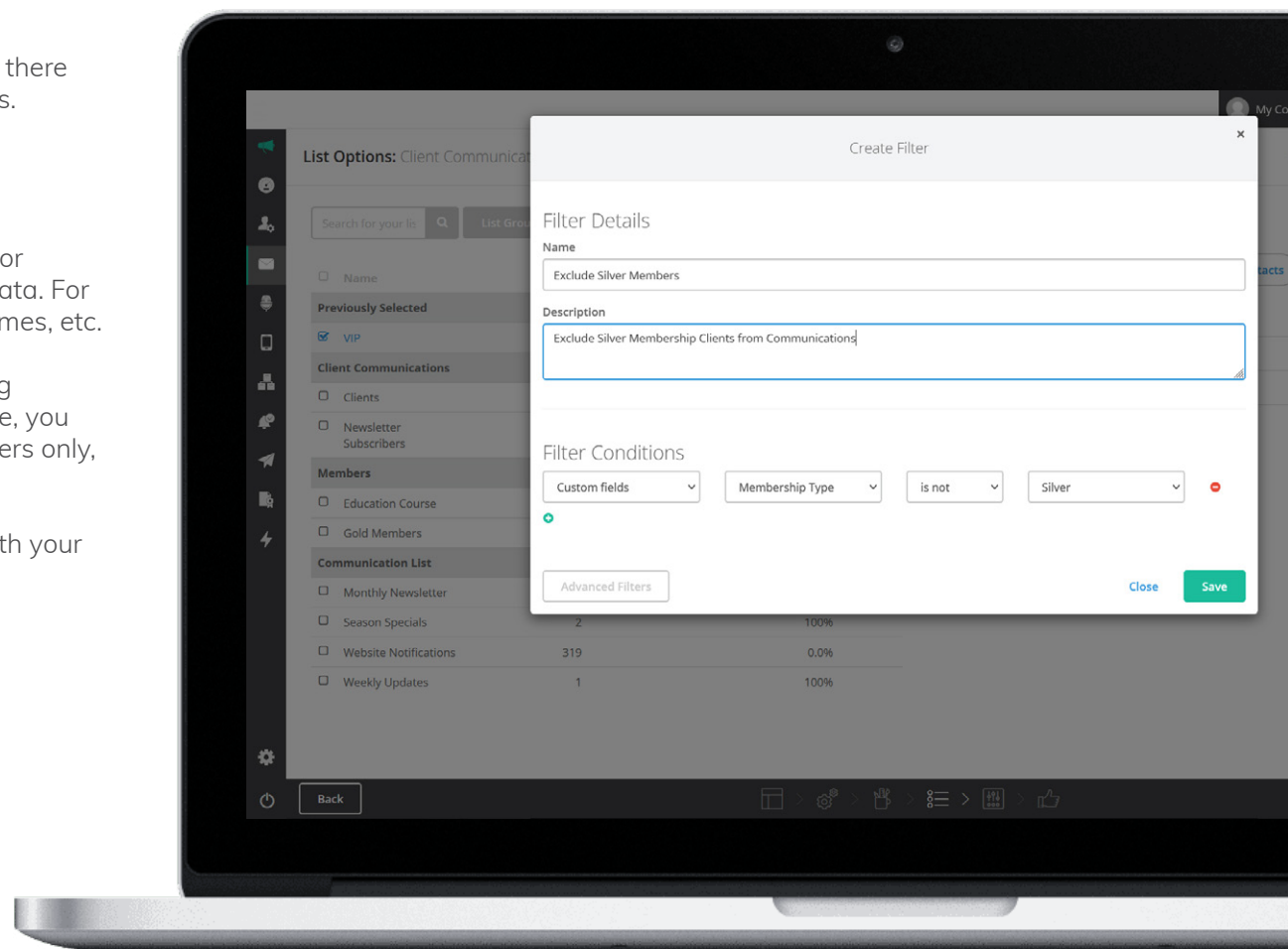
How to Do This in Everlytic

Filters are easy to set up in Everlytic. All you do is:

1. Go to *filters*
2. Click *Create Filter*.
3. Enter a name and description for your filter.
4. Refine your filter properties.
5. Click *Save*.

[Read detailed instructions](#)

Visit us at www.everlytic.com or [click here](#) to schedule a chat.



How to Personalise Your Messages (cont.)

Mid-Level Personalisation (cont.)

Segmenting with Tags

Tags take filters to another level, enabling you to collate contacts with the same interests in a similar way to how you can collate related social media posts using hashtags.

They work in conjunction with filters, but are used a bit differently, because all your tags (e.g.: male, female, from Europe, likes cats) fit into one 'tags' field (column). A platform like Everlytic then searches through that one field to find the tag associated with the contacts who fit the criteria of your email content.

For a more detailed look at how to use tags, read our blog post, [How to Improve Your Customer Experience with Contact Tagging](#)

How to Do This in Everlytic

To tag contacts, follow the standard import process and ensure that you:

- Include a tags column in your list.
- Separate each tag in the tags field with a comma.
- When you map your fields, map the tags column as tags.

[Read detailed instructions](#)

Visit us at www.everlytic.com or [click here](#) to schedule a chat.

The screenshot displays the Everlytic interface for mapping imported columns. The 'Match columns with your fields' window shows a table with columns: Name, Last name, Email address, Mobile number, Membership Type, and Tags. The 'Tags' column contains various tags for each contact, such as 'Male, Manager, Dancing, Music, Vanilla' for Joe. A dropdown menu is open for the 'Tags' column, showing a list of tags: 'Male, Manager, Dancing, Music, Vanilla', 'Male, Managing Director, Chocolate, Dining, Cars', 'Female, Programmer, Movies, Popcorn, Sleep', 'Male, Chef, Food, Dining, Asia', 'Male, Driver, Vanilla, Music, New York', 'Female, Doctor, Mint, Maldives, Running', and 'Female, Architect, Painting, Lime, Cake'. A green dashed arrow points from the dropdown menu to the 'Tags' column in the table.

Name	Last name	Email address	Mobile number	Membership Type	Tags
Joe	Peter	joe@emailaddress.com	2782456456	Silver	Male, Manager, Dancing, Music, Vanilla
Kevin	Wilfield	kevin@emailaddress.com	2781454721	Gold	Male, Managing Director, Chocolate, Dining, Cars
Mbali	Kangai	mbali@emailaddress.com	2782365847	Black	Female, Programmer, Movies, Popcorn, Sleep
John	Lancaster	john@emailaddress.com	2782987123	Silver	Male, Chef, Food, Dining, Asia
Peter	Dayton	peter@emailaddress.com	2781453786	Silver	Male, Driver, Vanilla, Music, New York
Lynette	Barlow	lynette@emailaddress.com	2782357159	Gold	Female, Doctor, Mint, Maldives, Running
Mia	Garcia	mia@emailaddress.com	2782066264	Black	Female, Architect, Painting, Lime, Cake
Lucas	Miller	lucas@emailaddress.com	2782879531	Platinum	Male, Painter, Chocolate, Music, Asia
Isabella	Davis	isabella@emailaddress.com	2782325458	Platinum	Female, Dentist, Dancing, Strawberry, Africa

How to Personalise Your Messages (cont.)

Advanced Personalisation

Advanced personalisation methods are more advanced ways of using database segmentation. And we'll start with dynamic content.

Using Dynamic Content to Customise One Email for Different Audiences

Dynamic content is an email personalisation tool that enables you to create different messages for different audiences within the same email, and program which audiences receive which sections based on their data. This saves you time on creating separate messages for each segment of your audience.

For example, if you're a clothing retailer, you may want to send out a summer promo email. But instead of creating two separate emails for women and men, you create one email. Where there are sections relevant to different sexes, you create two different sections and program the email to only show the men's section to men and the women's section to women.

The content you apply dynamic content to can include:

- Headings
- Text
- Images

Flight Centre Boosts Website Traffic from Email by 388.72% with Dynamic Content

Flight Centre created a personalised experience for users by sending them emails customised to their travel destinations, buyer personas, travel interests, and purchase history.

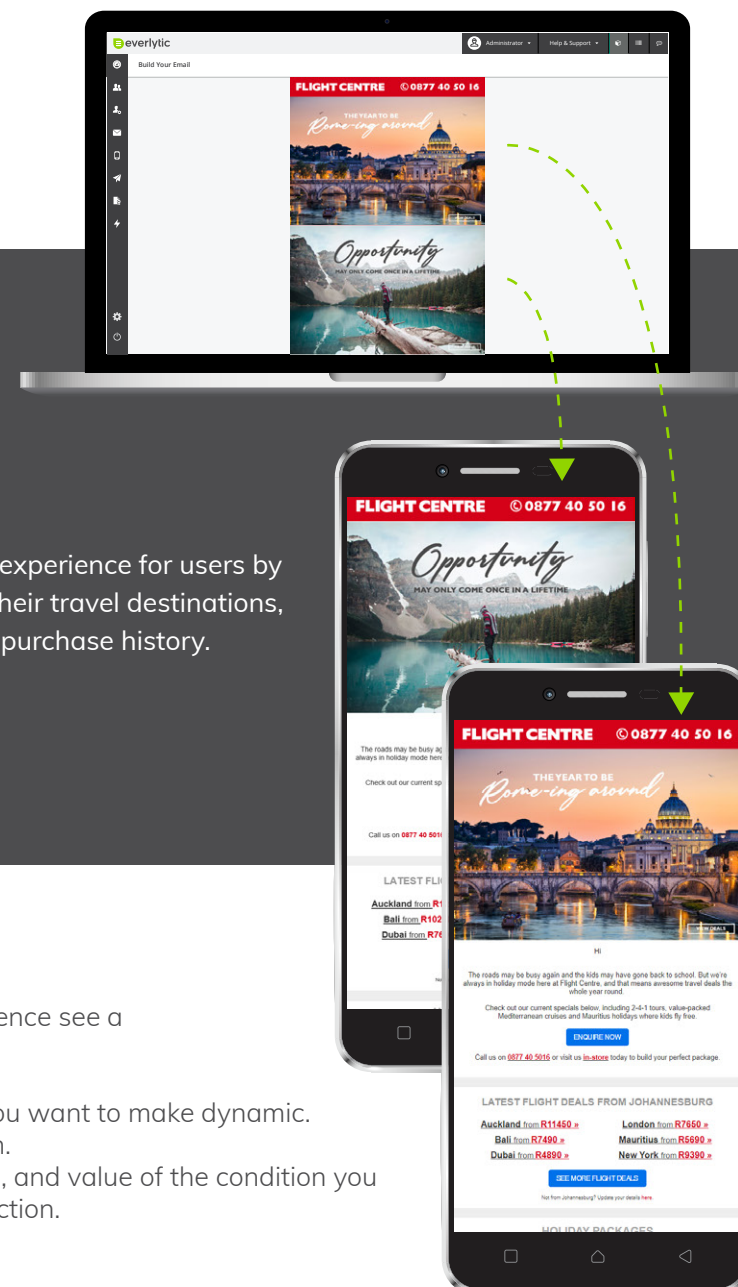
[Read the Case Study](#)

How to Do This in Everlytic

To customise which segments of your audience see a section of your email:

1. Hover over the full layout section that you want to make dynamic.
2. Click the *Add dynamic statement* button.
3. Select the data category, field, condition, and value of the condition you want the recipient to meet to see the section.
4. Click Save.

[Read detailed instructions](#)



How to Personalise Your Messages (cont.)

Advanced Personalisation (cont.)

Tracking & Collecting Data Automatically with Interest-Based Tags

You learned about contact tags in the mid-level personalisation section. Interest-based tags take this a step further – it's like tagging on autopilot.

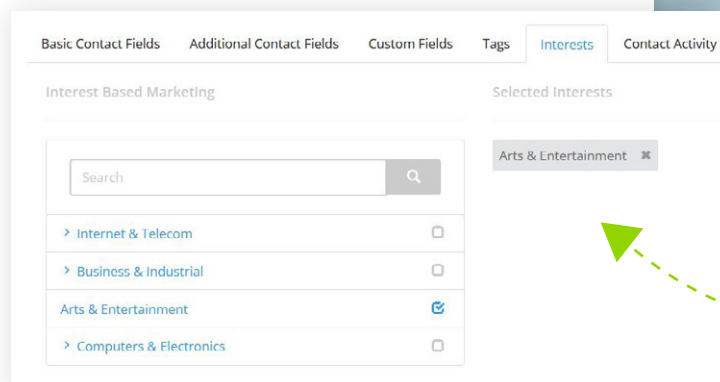
Using natural language processing (a form of machine learning), a platform like Everlytic can categorise the content your contacts are clicking on within your emails and tag them with it in your database. You can then use this data to create filters based on interests, so you can get even more granular with segmentation and targeting.

How to Do This in Everlytic

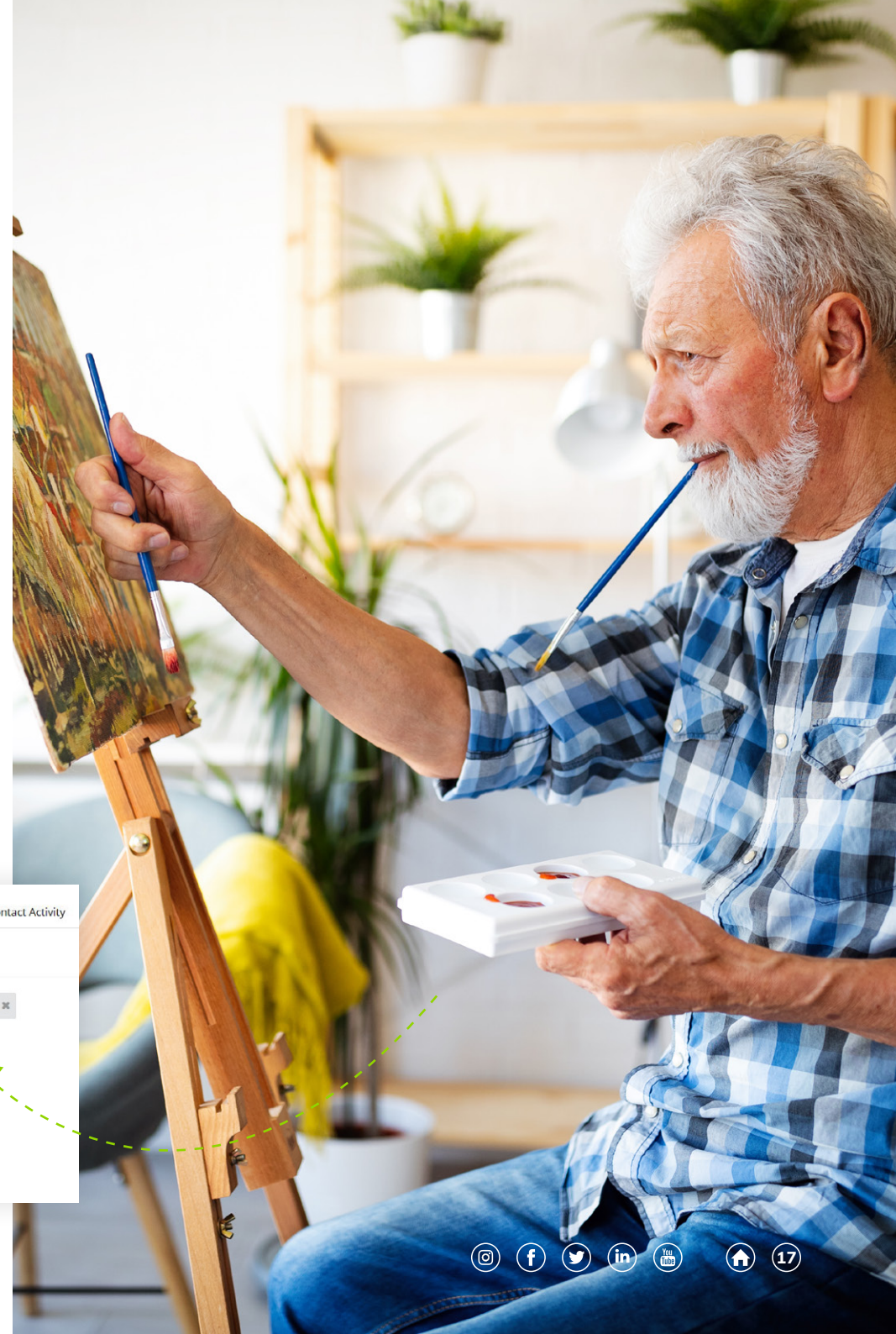
Setting up interest-based tagging is as simple as checking a checkbox when creating an email. Once you've done that and collected some interest-based tags, create a filter:

1. Go to *filters*.
2. Click *Create Filter*.
3. Enter a name and description for your filter.
4. Go to the *interests* tab and select the interests you'd like to filter on.
5. Click *Save*.

[Read detailed instructions](#)



Visit us at www.everlytic.com or [click here](#) to schedule a chat.



Personalisation Ideas

Now that you've got a good idea of how to personalise your messages, here are some examples of what to personalise in your messages.



Customise Message by Weather

If the weather on a certain day will impact your subscribers, share the weather forecast for their specific region using segmentation (and dynamic content, if you're familiar with it), so their content is customised to their needs.



Send Special Deals to VIPs

If you've got data on who your most active clients are, either via [an ecommerce integration](#) or an import, you can send custom deals to keep them coming back. Win-win for everyone!



Send Purchase-Related Tips

Another great way to use purchase data is by sending contacts information relevant to the products or services they've bought. This will add value to the client and could even open the possibility of upselling or cross-selling.



Personalise Content by Send Time

Another great way to use purchase data is by sending contacts information relevant to the products or services they've bought. This will add value to the client and could even open the possibility of upselling or cross-selling.



Segment Based on Personas

If your typical customers fit into certain 'types' based on things like interests and spending habits, you can also segment your database using personas.

In our [content strategy guide](#), we explain that adding a name, face, and character to segments of your audience makes it easier to create content that speaks to them personally and it makes your communication with them more authentic.



NetFlorist Used Quick Thinking & Personalisation to Boost Mobile Web Traffic from Email by 170% During Lockdown

It was an intense time back in 2020 when all the lockdowns hit, and businesses had to pivot – fast. NetFlorist handled this especially well, putting a halt on all flower deliveries and shifting to fresh produce instead.

Using database segmentation and several other email marketing tactics, they survived and thrived despite the chaotic times.

[Read the Case Study](#)

Testing Your Personalisation

Once you've personalised your message, it's time to test.



Before

Testing Before Send

Before you send any email, it's important to send yourself a test version to make sure the email is displaying how you expect it to. This is especially important when you've included personalisation in your message.

In Everlytic, for instance, you can preview your email layout, or check the personalisation by sending yourself a test.

During

Testing What to Send

A/B tests enable you to send two slightly different versions of the same email to a sample of your contacts to test which email gets a higher click- or open-rate. After a predetermined time, the better-performing email is automatically sent to the rest of your database.

Use it to test if personalisation performs best compared to no personalisation or which personalisations work better than others.

Get more A/B testing tips in our blog post, [The Basics of A/B Testing Your Emails](#).

After

Testing How it Performs

Tracking engagement metrics, like clicks, opens, etc, is important for any message you send – whether it's personalised or not. Use it to assess the impact personalisation has on your message engagement overall (like a before and after view) and to assess which mails are more effective at achieving your goals.

Analysing your email metrics can help you monitor the success of your campaigns in relation to your business goals. [Use the guidelines in this blog to learn how.](#)

Personalisation Mistakes to Avoid

Recently, we hosted a keynote event in the UK with Kath Pay, a **best-selling author** and Email Marketing Thought Leader Award winner. In her presentation, she uncovered the common (but rarely spoken about) mistakes you may be making in your email personalisation and how you can avoid them. Here are some of them:

1 Getting Overwhelmed by Personalisation

As we've expressed, personalisation is a big topic, so getting started can be overwhelming. Kath explained that the best way to avoid personalisation overwhelm is to break your strategy and tactics into smaller steps – much like the progressive implementation we've suggested in this guide. Use your learnings from each step to improve gradually over time.

It also helps to use personalisation as a tactic, not the goal itself. Personalisation isn't typically a business goal anyway – but improving the customer experience is. And personalisation is an ideal tactic for making strides towards this.

2 Not Using Overt & Covert Personalisation

Brands typically use more overt personalisation in their marketing. This is when you tell the recipient that you're personalising the message with their data (e.g.: abandoned-cart messages, emails explicitly saying they're based on the recipient's interests, etc).

This is effective in some cases, but isn't always appropriate, because people are uncomfortable with the idea that you track them. Over-personalisation can feel creepy.

Covert personalisation is more subtle – almost like a serendipitous event – and it provides balance to overt personalisation. For example, if you've tracked a recipient's activity on your website using site-tracking software, include the items they've looked at in your next marketing email – without explicitly saying it's there because you've tracked them.

Watch the **replay** of Kath Pay's keynote.



Personalisation Mistakes to Avoid (cont.)

3 Over-Segmenting Your Database

Segmenting your database is a powerful personalisation tool but be careful that you don't unintentionally exclude potential clients from your communications.

For example, in her keynote, Kath speaks about a new client of hers that was getting a lot of drop-offs from their emails. Upon inspection, Kath realised that they weren't sending messages to people who hadn't visited the site in the last 3 to 9 months – a point in time when (unknown to them at the time) their recipients were actually most likely to buy.

They assumed that recipients who were recently active were more likely to buy. But this wasn't the case. By over-segmenting, they actually lost potential business.

What's the key takeout? Speak to active visitors more regularly, but don't stop communicating with less-active customers. Some people need to be tantalised more with consistent, valuable email content before they buy. And even then, those who got value from your emails may still end up converting through other channels – not necessarily from the emails themselves.

4 Not Testing Personalisation Correctly

Most email marketers aren't specialists in the space, so they don't always know about effective email testing. If this is you, then there's a chance that you could be optimising for the wrong metric – and losing money because of it. For instance, if your objective is to increase conversions, testing for opens won't help. You must test for clicks and actual conversions.

But it doesn't end there. It's also important to remember the key objective that personalisation tactics support: enhancing the customer experience. Conversions are a short-term success metric. Long-term is customer lifetime value – something you track across the entire relationship.

When you test only for the short-term, you may lose out on some valuable insights about the long term. Sometimes what works now isn't what works later. Test for both.



Tip From Kath for Testing Personalisation:

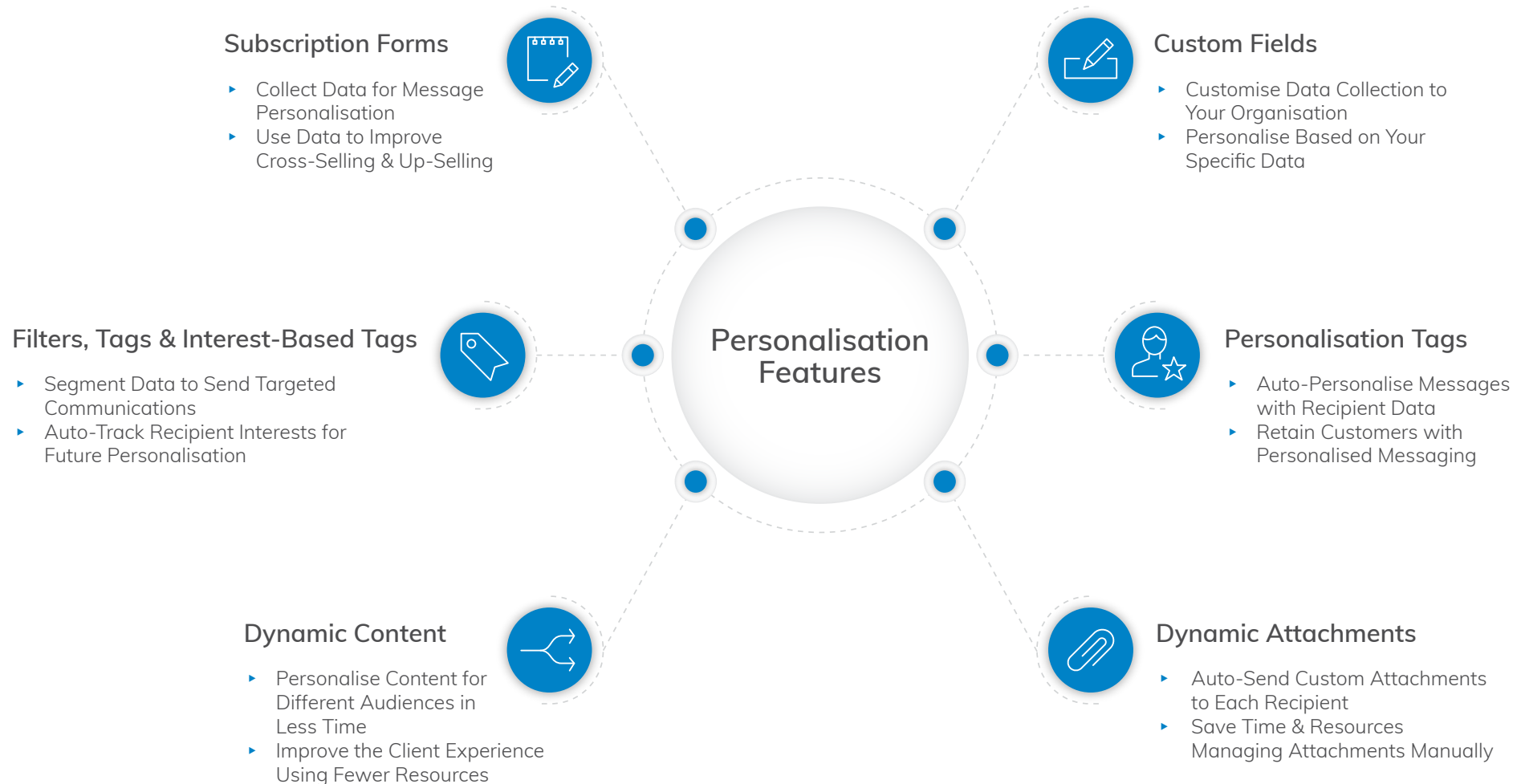
When testing for personalisation, include a control message (a message without personalisation) to see when and how personalisation increases your conversions.

On a long-term basis, you can also track how your control group performs compared to the personalised group. Are personalised messages more or less likely to keep customers coming back?

Watch the replay of [Kath Pay's keynote](#).

Personalise Your Messages with Everlytic

Everlytic is a bulk communication platform that enables you to personalise and automate messages sent via email, SMS, voice broadcasting, and web push notifications. These are some of our personalisation features that can enhance your customer experience.





Conclusion

Personalisation is a necessity. Don't let not knowing how it works get in your way of implementing it successfully in your business. Use this guide and the functionality in Everlytic to get there one step at a time.

Chat to a Consultant



www.everlytic.com | sales@everlytic.com

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