

Unlocking Hyper-Personalization Using Data & AI

blueshift

 UDACITY





Ben Okeya

Customer Success Manager



Lauren Reiterman

Manager, CRM



Unlocking Hyper-Personalization Using Data & AI

Personalization

Building a scalable strategy to maximize ROI.

blueshift

UDACITY



Why build a personalization strategy?

8

Email attention span in seconds ¹

76%

Of customers said personalized content made them more likely to buy ²

+32%

CTOR rates with product recommendations ³



54%

of Marketers reported better email engagement with personalization ⁴

62%

of customers feel an emotional connection to the brands they buy from the most ⁵

71%

of customers expect brands to personalize ⁶

76%

Of customers said personalized content made them more likely to buy ²

62%

of customers feel an emotional connection to the brands they buy from the most ⁵

The Golden Rule

- **Recognize customers** for their individuality
- **Understand them** for their tastes and preferences
- **Celebrate them** for their milestones
- **Help them out** with what they need most

HOW TO PERSONALIZE

Leverage Real-Time Data

Action critical moments in your customer lifecycle with dynamic content, customized according to your personalization strategy.

WHY THIS WORKS

Behavioral + zero-party data create a complete picture of your customer.

WHAT TO RECOMMEND

AI-Powered Recommendations

We saw a **32% lift in CTOR** using Blueshift's AI-powered recommendation engine to suggest courses personalized to a student's learning history.

WHY THIS WORKS

Customers get what they want with less work.

WHY SCALE PERSONALIZATION

Maximize ROI

Using segmentation, shared assets, liquid syntax, and external fetch API, we're able to scale personalization and **reduce campaign workload 5x**.

WHY THIS WORKS

We customize content and manage ops efficiently.

WHERE TO MESSAGE

SMS vs Email Channel

We saw **3-8x lift in clicks per send** on notifications using the SMS channel in addition to email.

WHY THIS WORKS

Customers are updated faster and complete critical actions easier.

Leveraging Real-Time Data

HOW TO PERSONALIZE

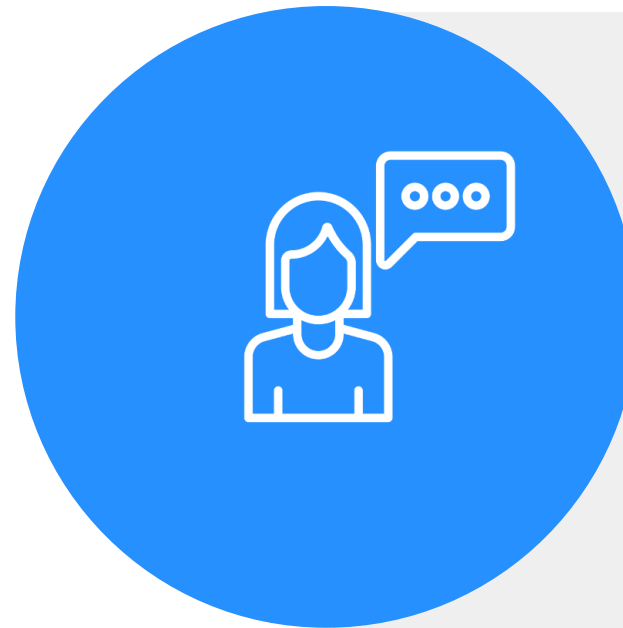
Leverage Real-Time Data

Action critical moments in your customer lifecycle with dynamic content, customized according to your personalization strategy and first-party data.

mobile message by Design Circle from [Noun Project](#) (CCBY3.0)

talking by Design Circle from [Noun Project](#) (CCBY3.0)

online chat by Design Circle from [Noun Project](#) (CCBY3.0)



ZERO-PARTY DATA

- Quizzes
- Newsletter sign-ups
- Gated rewards and offers
- Onboarding surveys

FIRST-PARTY DATA

- Cookie-tracked action
- Visits
- Downloads
- Purchases
- Product activity



Creating Your Customer

Unify Customer Data

Personalization and automation rely on unified, real-time profiles for each user. We lean on survey data, prior transactions, behaviors, campaign engagement, product interactions, and real-time activity from across channels.

Build an Intentional UX

Your experience enables you to:

- 1) Collect key data.
- 2) Build MVP customer segments.
- 3) Track key actions in the customer journey.
- 4) Trigger marketing and in-product interventions.



Building the Customer Profile

Anonymous User

User

Registered Account

Paying Account

Alumni

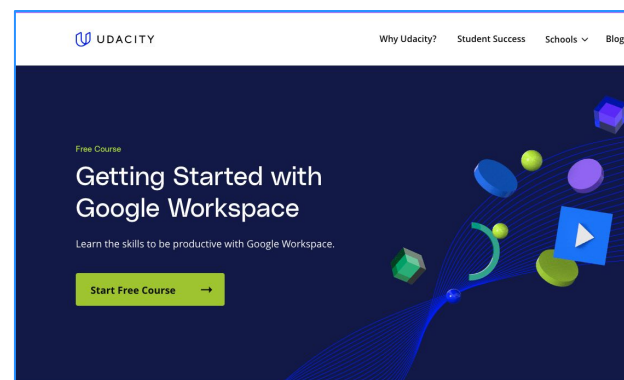
Anonymous User

browses website, tracked by 🍪

CRM

First-party data being collected.

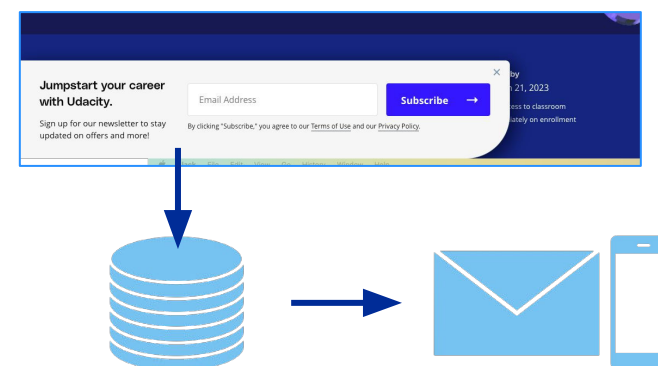
- Geo
- All site actions



User is created after Anonymous User submits email through webform.

CRM

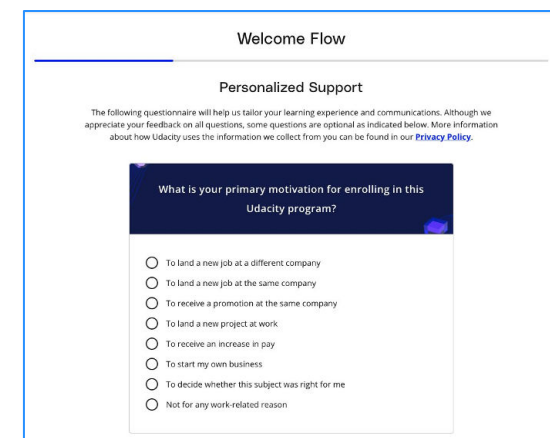
- Behavior tracked
- Kick off Email & SMS
- Product Reco's start



User converts to **Account** to start a free course, then submits in-product survey.

CRM

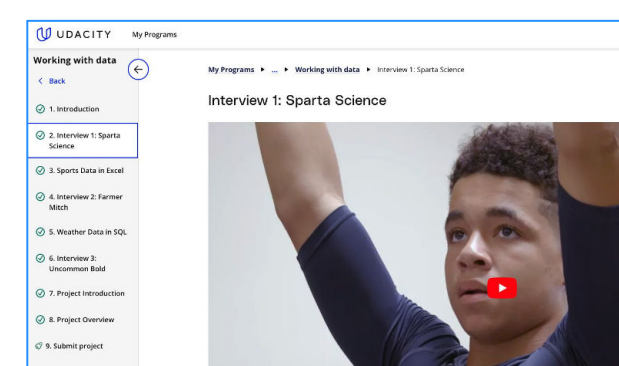
- Zero-party data collected
- Persona development
- Advanced Content Personalization



Account converts into paid Nanodegree program.

CRM

- Transition to Lifecycle communications
- Suppression from Marketing CRM
- In-product reviews and data collected



Account converts to **Alumni**. Alumni completes outcomes survey.

CRM

- Zero-party data collected
- Marketing re-engages with learning path and fresh content



AI-Powered Recommendations

WHAT TO RECOMMEND

AI-Powered Recommendations

We saw a **32% lift in CTOR** using Blueshift's AI-powered recommendation engine to suggest courses personalized to a student's learning history.



GET THE CREATIVE JUICES FLOWING

- Automate recurring newsletters with freshly generated product suggestions
- Curate product collections by a category, trending, seasonal, top-selling
- Upsell users a product path
- Replay what users recently viewed

UDACITY'S RECOMMENDATIONS

- Top-sellers within a category: AI, Data, etc.
- Courses and degrees according to duration, experience level, new in catalog
- Prescribed Learning Paths learners like you also took

REAL-TIME CONTENT

Recommendations allow us to pull products, content, and offers directly from our catalog in real-time. Automated recurring newsletters with the latest product data.

TIME SAVINGS

Automation saves our team 10-15 hrs per month fetching product data and manually updating email html code across multiple campaigns.

Top degrees in Data

Get job-ready in 2023 for a career in data

Start today to be ready for your next career move in less than 4 months.

[Data Courses →](#)

Start your new year off right by learning lucrative, in-demand skills in data. Our Nanodegree programs get you job-ready with hands-on, real-world projects and 24/7 learning support from our team of skilled mentors. Discover our most popular data programs below:

Data Engineering with AWS

Learn to design data models, build data warehouses and data lakes, automate data pipelines, and work with massive datasets. [View syllabus.](#)

Pre-requisites: Intermediate Python, intermediate SQL, and command line skills.

Data Engineering with Microsoft Azure

Learners will acquire the skills needed to design data models, create data pipelines, and navigate large datasets on the Azure platform. Additionally, they will learn to build data warehouses, data lakes, and lakehouse architecture. [View syllabus.](#)

Pre-requisites: Experience with SQL, Python, Azure, and Github.

Data Analyst

Advance your programming skills and refine your ability to work with messy, complex datasets. You'll learn to manipulate and prepare data for analysis, and create visualizations for data exploration. Finally, you'll learn to use your data skills to tell a story with data. [View syllabus.](#)

Pre-requisites: Experience working with Python (specifically NumPy and Pandas) and SQL.

New courses and degrees

See what's new from Udacity.

New project-based Nanodegree programs.

Ethical AI

Learn to apply ethical AI to minimize bias, while maximizing fairness and explainability, ensuring an ethical future for all.

School of Artificial Intelligence

[View Program](#)

Zero Trust Security

Learners leave the course with a reinvigorated perspective on cybersecurity and a lexicon of practices and solutions that support what is rapidly becoming the new dominant strategy in enterprise security.

School of Cybersecurity

[View Program](#)

Cybersecurity for Business Leaders

Learn to leverage the capabilities of cybersecurity best practices to protect your organization and unlock next-level results.

School of Cybersecurity

[View Program](#)

Maximizing ROI

WHY SCALE PERSONALIZATION

Maximize ROI

Return on Operational Investment

Using segmentation, shared assets, liquid syntax, and external fetch API, we're able to scale personalization and **reduce campaign workload 5x**.

PERSONALIZED COPY

Try these courses to help you deepen your knowledge of a subject

Try these courses to help you confidently take on new challenges at work

Try these courses to help you start your own business

DYNAMIC CONTENT BLOCKS

Content changes based on user attributes from the Customer Profile.

For example:

- Customer type (user, free, paid, churned).
- Interests
- Motivation

UDACITY

Try these courses to help you take your career to the next level.

You've built great momentum by taking a free course. Now's the time to level up with one of our Nanodegree programs.

Nanodegree programs help you get the skills you need to take your career to the next level.

Based on the free course that you chose, we suggest enrolling in one of these Nanodegree programs:

<p>Digital Project Management</p> <p>LEARN MORE</p>	<p>Predictive Analytics For Business</p> <p>LEARN MORE</p>
<p>Marketing Analytics</p> <p>LEARN MORE</p>	<p>Digital Freelancer</p> <p>LEARN MORE</p>

By enrolling in a Udacity Nanodegree program, you'll get access to many valuable services you didn't have with one of our free courses, including:

- ✓ Real world projects that give you the job-ready skills you need to increase your earning potential
- ✓ Project reviews from highly-vetted industry professionals
- ✓ 24/7 technical mentor support so you get personalized help when you need it
- ✓ Flexible learning plans so you can learn at your own pace
- ✓ Student community to help support you in your learning journey

Didn't find what you're looking for? Browse the full catalog of 200+ paid and free tech courses.

[Browse catalog](#)

Explore available scholarship programs

Udacity is currently offering several scholarship programs in AI Programming with Python, Business Analytics, Digital Marketing, or Front End Web Development Fundamentals.

[Browse scholarships](#)

Leveraging SMS

WHERE TO MESSAGE

SMS vs Email Channel

We saw **3-8x lift in clicks per send** on notifications using the SMS channel in addition to email.



When SMS is Best

Because of SMS's high open and response rate, it's preferred for key, time-sensitive user actions.

- **Unblocking faster:** Unblock critical actions in the product journey
- **For urgency:** Communicate expiration dates for key actions
- **For convenience:** Send a copy of a recent download, a purchase confirmation
- **Date reminders:** For deadlines or appointment dates
- If the **mobile-web** experience is superior, direct to SMS
- Be courteous: If your **communication preferences** include SMS proactively share subscription settings

4 Must-Haves for SMS

PERSONALIZATION

You're now sharing space alongside of friends and family. Keeping messages personable and targeted makes them more familiar, human and inviting to open.

KEY ACTION CTA

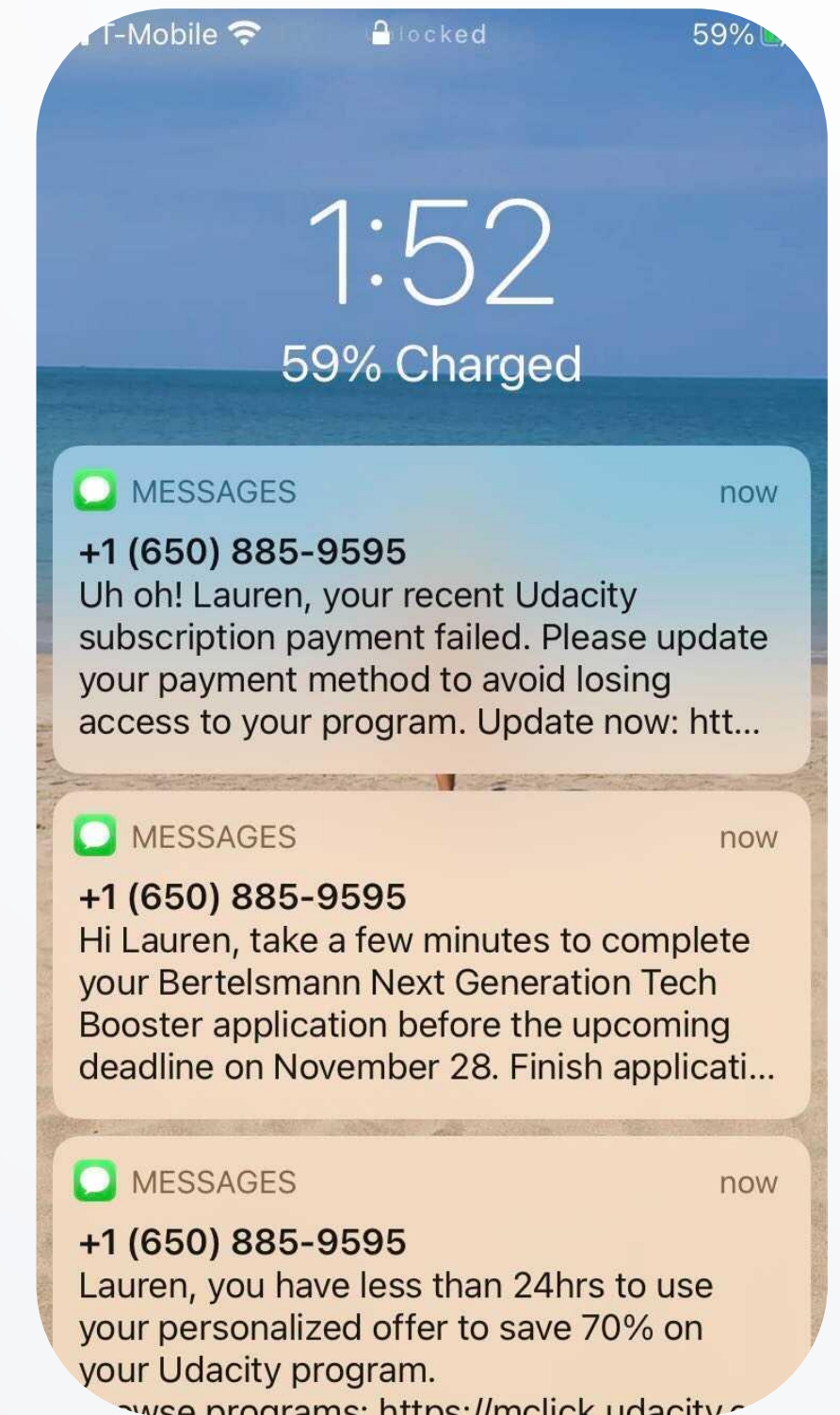
Respect the intimacy you earned by only sending important messages that would benefit or unblock a user.

URGENCY

Train users to keep up fast-response times by only sending messages that demand a user's prompt attention today.

COURTESY

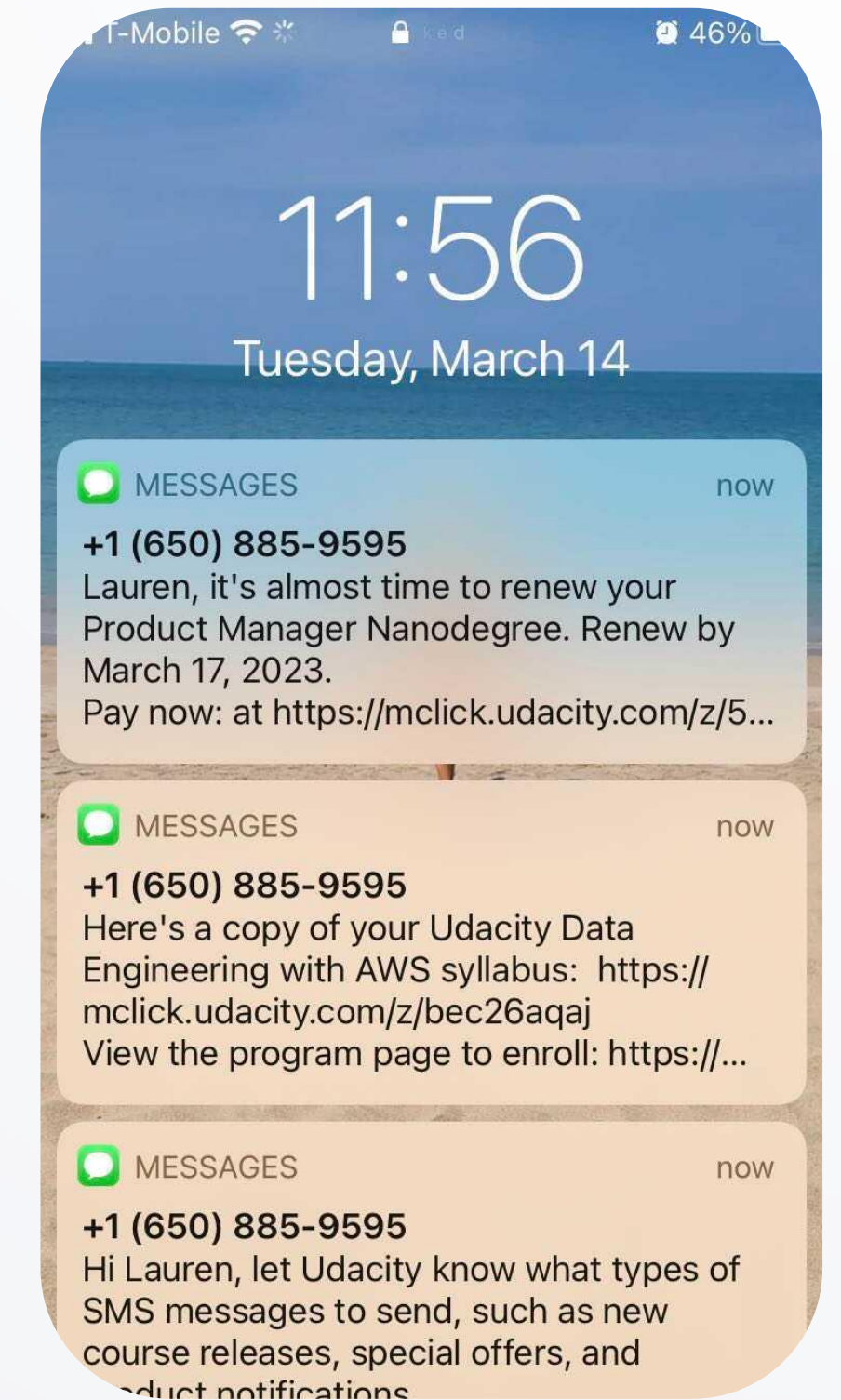
Keep trust with your customers that you won't violate their personal space by interrupting sleep or personal time. Some countries have rules for when it is appropriate to send SMS.



A marketer's dream engagement

SMS messages receive up to 8x the click engagement as email.

Campaign	Lift in CTR
1 Subscription Payment Reminders	3x 9% vs 26% CTR
2 Notifications Preferences	5x 3% vs 16% CTR
3 "Last Chance" Special Offer Expiration	5x 4% vs 19% CTR
4 Downloaded Content	5x 8% vs 40% CTR
5 Project Review Prompt to Mentor	8x 2% vs 16% CTR



Action Plan: 5 Steps to Getting Started

PLOT YOUR LIFECYCLE

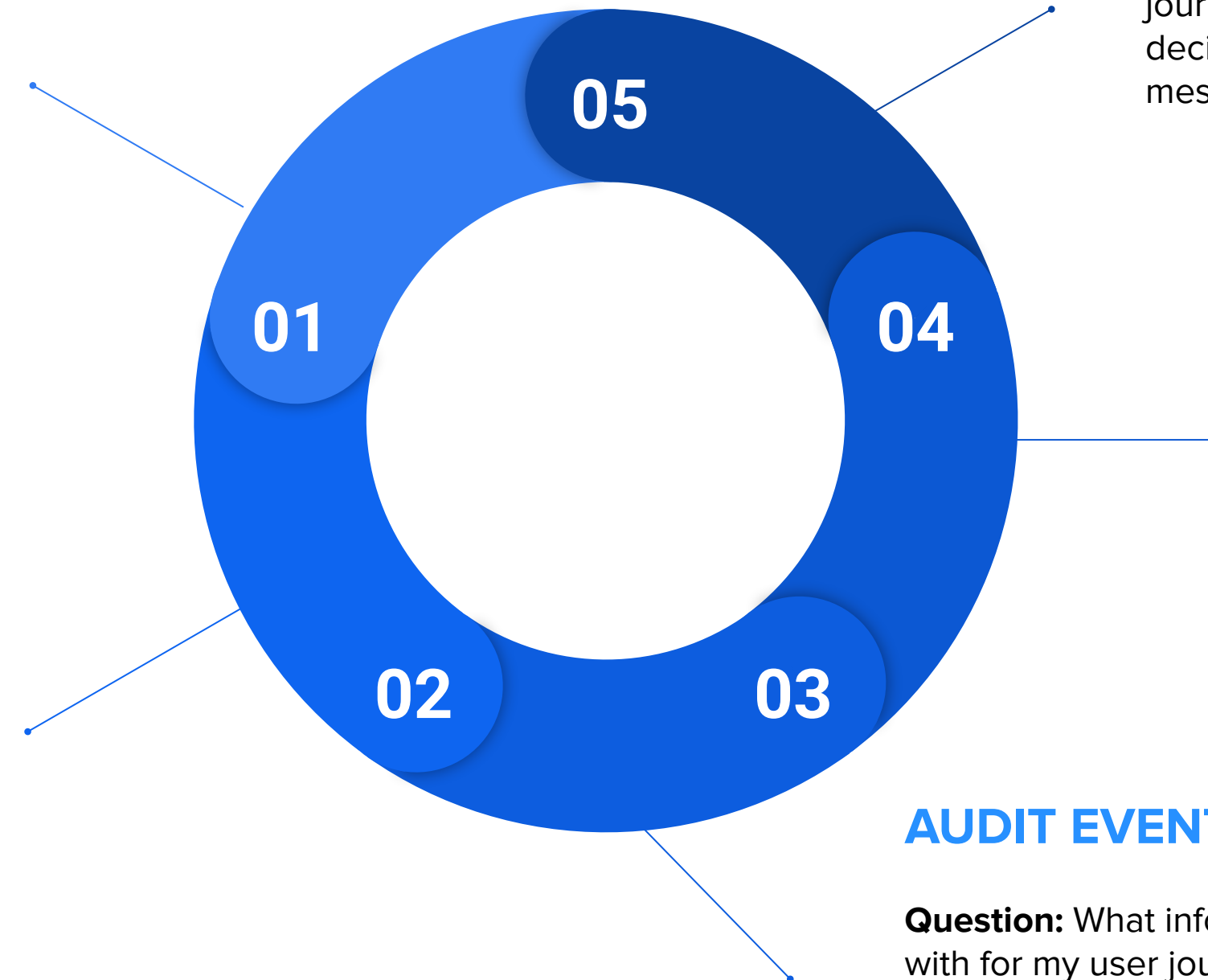
Question: What is your customer journey?

Output: Document the critical action and decision points along your customer journey. Note peak emotional moments.

IDENTIFY MVP SEGMENTS

Question Who is your **Most Valued Persona**?

Output: Define your target customers, what do they do, what they like, what they want. Don't overcomplicate. Focus one 1-2 segments.



EXECUTE YOUR STRATEGY

Output: Here you create campaign journeys based on your critical lifecycle decision points, available user data and messaging strategy.

CREATE YOUR CONTENT STRATEGY

Question: What is being sent to whom.

Output: Write content such as key messages, proof points, and product reviews, and assign to MVP customer segments for each lifecycle stage.

AUDIT EVENTS & USER DATA

Question: What information do I have to work with for my user journey and profiles?

Output: Identify the gaps and possibilities for personalization.



A Fireside Chat

With Ben & Lauren

Thank you!

Ben Okeya
Customer Success Manager
Blueshift

✉ ben.okeya@getblueshift.com

in [LinkedIn](#)



Lauren Reiterman
Manager, CRM
Udacity

✉ lauren.reiterman@udacity.com

in [LinkedIn](#)

