
MAKE IT PERSONAL:

Building relationships at scale through
next-level digital campaigns



Evolve your marketing

Because digital marketing is constantly evolving and developing, small business marketers are presented with a unique opportunity — the opportunity to level up their marketing game and add new, impactful strategies to the mix. Solid, ongoing email, social and text messaging strategies can help build relationships and create success — but what's out there to help you understand your customers, personalize your messaging even further, and reach them in their preferred online locations?

In this eBook, we'll be hitting on three big ways small business marketers can take their marketing efforts from status quo to something truly spectacular through automation, personalization and more.

What you'll learn

03 Understand your audience
with email heat maps and revenue reporting

06 Get on their level
with dynamic content and custom segmentation

10 Make it easy and scalable
with custom automations

12 Conclusion



Understand Your Audience

Business owners of all experience levels have one key thing in common: it's absolutely critical that they understand their audience in order to attract them, engage them, and nurture a valuable relationship with them. Reporting and analytics tools that provide insight into metrics like opens, sends and clicks allowed marketers to see how their outreach was working, and to improve when it wasn't.

But understanding the customer has come a long way since then, allowing for deeper insights into customer engagement and behavior. You might be keeping an eye out on basic metrics, but here are helpful tools to dig deeper that you should be using to give your campaigns (and your business) that extra edge.

Understand Your Audience

Heat Map Reporting



What is a heat map and how does it work?

Just like a meteorological heat map that shows “hot spots” in the hottest part of the area, a heat map for web or email will show you where users clicked the most.

For emails, this means seeing at a glance the top links that your readers engaged with. With a quick scroll, you can follow your readers’ footsteps and see where they stopped to click into your images, calls to action (CTAs), and even footer links.



How does this help me?

Obviously, if you put links in your email, they’re there for your readers to click, right? But not all links are created equally, and understanding what your readers gravitate toward can tell you a lot about your email content and how to improve it.

- **Are the majority of your clicks somewhere other than where you *really* wanted them?**
Your CTAs may not be clear enough or compelling enough.
- **Is there no clear pattern of clicks?**
You may have too many links in your email, creating confusion, or too few links, driving no action at all.
- **Are all your clicks occurring too early in the email, well above where the real content is?**
Your copy and design may be too long, making your readers stop scrolling.
- **Are most of your clicks in the footer, on links like “unsubscribe” or “privacy policy”?**
The content you are sending may not be what your customers expect, or your emails may be occurring too frequently.

Checking these often and comparing them from email to email (in addition to using features like email comparison reporting and A/B testing) can help you to fine-tune your approach to fit what truly delights and engages your customers.



Understand Your Audience

Revenue Reporting

What is revenue reporting and how does it work?

If you run an eCommerce business, you already closely monitor your sales and revenue. But do you know where your sales are coming from? This can be key to understanding customer behavior.

With revenue reporting tied to your digital marketing, sales that can be attributed to your campaigns are automatically reflected in your analytics with their respective emails. This attribution accounts for activities like direct clicks to your storefront from a campaign, or purchases in a set time period after communications are opened.

How does this help me?

Greater visibility into your revenue streams is always a good thing for an eRetailer. But by looking at which campaigns generate revenue, and comparing them to one another, you can begin to see a bigger picture about what communications are effective and how to expand on that success.

By evaluating your campaigns through a revenue reporting lens, you can begin to take a closer look at things like:

- **Content**

Evaluating your copy, photo links, coupons and other content from a revenue lens can help you determine efficacy and improve for the future.

- **Timing**

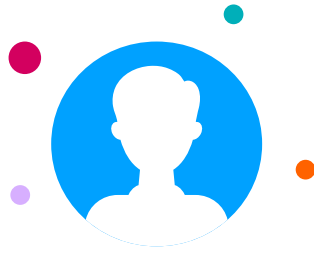
Everything from time of day to time of year can influence shoppers and their wallets.

- **Template and design**

As you experiment with templates and designs, you may start to see emergent trends in the revenue generation tied to these aesthetic changes.

Regardless of where you see positive or negative trends, these things can and should inform how you craft and send your sales-driving communications to your customers. Lean into what's working, and try something new for what's not!





Get on Your Customers' Level

So once you know and understand your customers, what's next? Understanding them doesn't matter if you don't communicate with them in a way that demonstrates that understanding. One-size-fits-all marketing can feel inauthentic and fall flat, but by adding personal touches to your email and text messages, you can build relationships at

scale—quickly, easily, and without having to create dozens of custom emails each time you reach out to your audience.

Here are ways to take what you know about your customers and turn it into something that speaks to them personally.

Get on Your Customers' Level

Dynamic Content



What is dynamic content and how does it work in email?

Every business wants its content to be dynamic—that is, energetic, stimulating, and progressive. But in digital marketing, dynamic content is content that changes based on the user before they ever interact with it at all.

This means you can create and send all your contacts a single email, but by adding dynamic content blocks, you can include content that changes based on your contacts' information stored in standard and custom fields within your database. Depending on what information you set out to gather from your contacts, you can use dynamic content to personalize your email in more refined, more specific ways. Dynamic information can be simple things like name and geographical location all the way up to complex things like product preferences and donor status, depending on your database.

A great example of this would be a gardening center asking users about their preferences when they sign up: Do they plant more flowers, or food plants? Do they like houseplants or luscious landscaping? Then they can use a dynamic content block in their newsletter to display a coupon targeted exactly to their users' preferences. One on-sale orchid, coming right up!

Marketers see up to

25%

higher open rates and improved click rates with dynamic content.

Source: Spiceworks

How does this help me take my marketing to the next level?

Ultimately, the success or failure of your marketing hinges on a single factor: whether your audience responds to it. Personalizing your outreach is one way to ensure you're reaching the right people with the right message, and that they feel the message was fully intended for them.

Get on Your Customers' Level

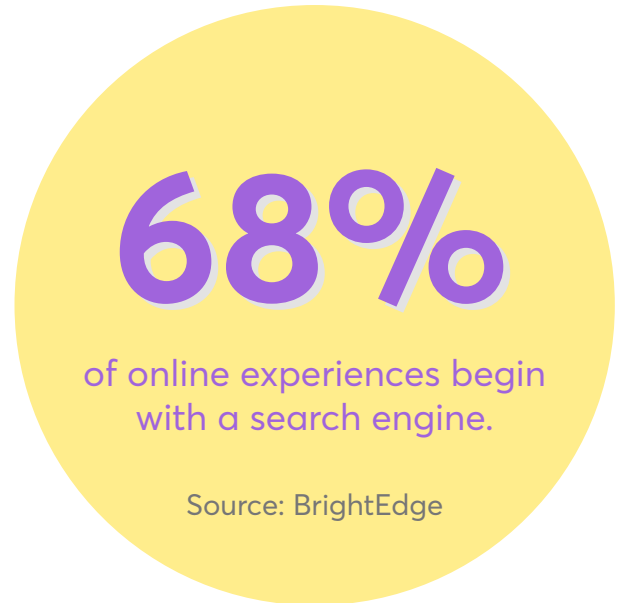
Search engine optimization (SEO)



What is search engine optimization (SEO) and how does it work?

Odds are, you're already somewhat familiar with search engine optimization and how SEO works. SEO is the process of identifying the terms and phrases your customers are interested in that relate to your business (also known as keywords) and ensuring those words and phrases are represented throughout your messaging and website content. When your customers and prospects search for things related to your business or location, then it is more likely they will discover you among the list of search results.

For instance, this could mean the difference between saying "American pub-style restaurant" on your website and saying "Modern pub serving American cuisine, with an expansive menu including burgers, hot wings, steak dinners, and homemade desserts." Ultimately, the success or failure of your marketing hinges on a single factor: whether your audience responds to it. Personalizing your outreach is one way to ensure you're reaching the right people with the right message, and that they feel the message was fully intended for them.



How does this help me take my marketing to the next level?

If you're not an SEO expert, then it can be difficult to look at your website and see where you can make improvements. But using tools that can assess the copy and content of your website as a whole and create scoring, insights, and recommendations can be a quick, easy way to make certain you see where improvements can be made—and where you can provide your customers the exact information they need to make a decision.

Unlike other forms of content personalization, SEO efforts work to make sure you're speaking to the right audience before they reach your website, and help you deliver the experience they expect, boosting both their knowledge and their perception of your business.



Get on Your Customers' Level

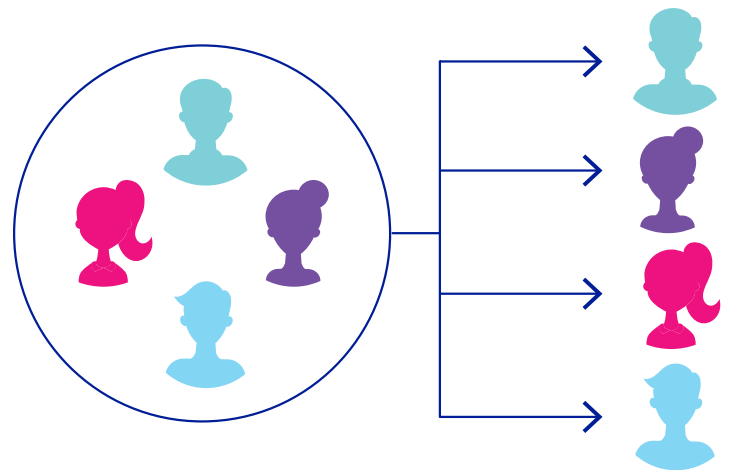
eCommerce Segmentation

What is custom segmentation and how does it work?

Custom segmentation is the practice of creating more advanced groups of customers based on their interactions with your business. For eCommerce businesses in particular, this segmentation is based on buyer behavior.

This segmentation works hand-in-hand with your online store provider (like Shopify, WooCommerce, and others), utilizing information generated during the shopping process to create customer segments. These can be basic criteria (like whether a customer has placed an order) or more advanced (like how much a customer has spent, or what specific products they purchased). Some providers even provide individual spending projections, allowing you to segment your digital marketing to that, as well.

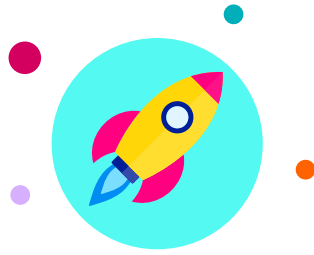
Ultimately, how you segment your audience as an eCommerce business is dependent on the amount of information you get – so the more thoroughly you can integrate your shop into your digital marketing (and vice versa), the more sophisticated and impactful your outreach can become.



How does this help me?

Loyal customers are the backbone of any retail business, and eCommerce is no different. By talking to your customers about how they buy, what they want, and what they need not only ensures engagement and future purchases, but also lets your customers know you're paying attention to their relationship with you, and that how they shop with you matters.

This type of segmentation can help you to create personalized product recommendations, impactful win-back campaigns, and long-lived loyalty programs. Get on your customers' level and you'll find they'll want to stay on yours, too!



Make it Easy and Scalable

The work of optimizing and fine-tuning your marketing is never done— after all, your audience is unique and constantly changing. But as a small business owner or marketer, your time is in short supply, making it a challenge to get to all the things you know can make a difference in your marketing.

Digital marketing automation can help take some of the sting (and the time commitment) out of your marketing, of course. But how can you automate something that's different for each and every customer? The answer is the perfect combo of customization and automation: custom automations for your marketing.

Make it Easy and Scalable

Custom Automated Marketing Paths

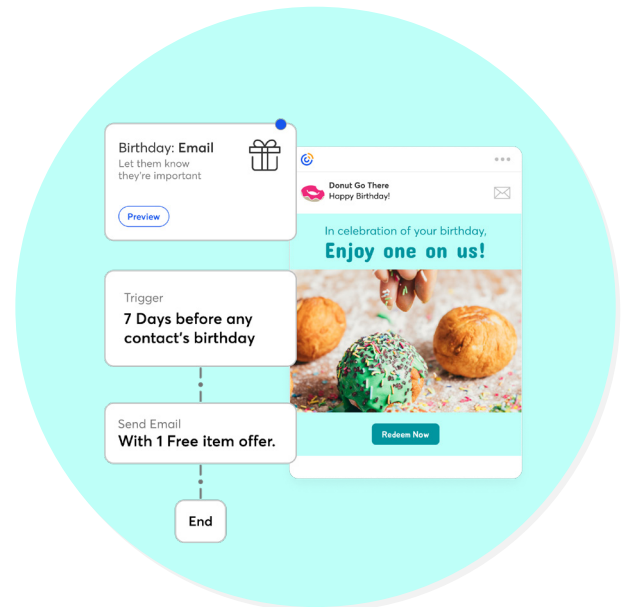


What are custom automations and how do they work?

A welcome series is a basic marketing automation that you are likely familiar with—when a contact opts in to hear from a business, they then receive a series of emails, spaced out over a period of time, welcoming them to the mailing or text messaging list and educating them about the company and its goods or services.

With custom automations, automated email flows can be crafted to be more sophisticated and tailored to the customer by using **delays**, **triggers** and **conditional splits**.

- A **trigger** is a behavior or action a customer takes that kicks off a messaging workflow, such as subscribing to a list, having a birthday, clicking on an email link, or placing an order.
- A **delay** is the time between the trigger and when the message is sent. This can be any time period from minutes all the way up to months after the initial trigger.
- **Conditional splits** are moments in your digital marketing automation where a contact's next communications are determined by their actions and information. Based on these splits, your users are segmented and sent down different messaging paths tailored to their activity. Splits can be based on things such as contact details, engagement activity, location and interests.



When combined, triggers, delays, and splits determine when an email or text messaging series starts, how much time passes before they receive a communication, and how those communications change and personalize in response to their activity.

How does this help me?

Custom automations can help you achieve the best of all worlds, customizing your outreach for your business and its needs while also providing timely, relevant and personalized content for your customers. This provides a number of benefits, including:

- ✓ Time savings
- ✓ Consistent messaging
- ✓ Increased engagement
- ✓ Relationship building



Even in the most finely tuned marketing plan, there is always room for marketers to improve by paying careful attention to their customers and nurturing those important relationships through evolving, personalized communications.

However, as all small business owners and marketers know, time is the hardest thing to come by when operating your business—which

means constantly streamlining, automating, and improving your marketing efforts in order to run efficiently.

Adopting new tools and technologies that allow you to foster your valuable relationships across hundreds or even thousands of customers, prospects, and other supporters can take your current marketing from “good” to “great,” all while delighting your customers and saving you time.

It's time to upgrade your marketing.

[Learn More >](#)