# Your Checklist for Creating Individualization Magic

Today, customers have high expectations when it comes to the marketing messages they receive. They want to feel like brands care about them as an individual, not a data point. This is why individualization is the path forward for marketers, not just the standard personalization we've heard about for years.

In our latest whitepaper, **"4 Steps to Make Individualization Seem Like Magic,"** we touch upon the four key tenets of marketing individualization and the top tricks for implementing them.

If you don't have time right now to read the full whitepaper, we've got you covered. This skimmable, shareable checklist will give a brief overview of each of the four elements needed to create individualized marketing messages and a few items to check off to make sure your strategies are on the right track. Et voilá!
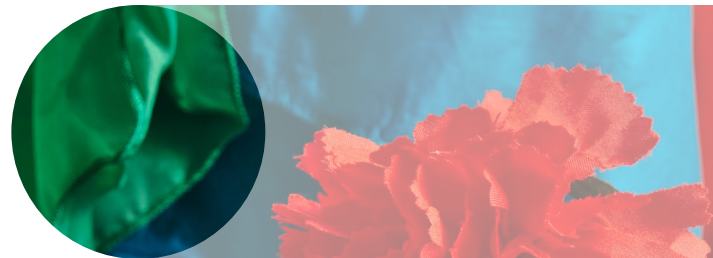
## Segmentation

Understanding your audience and dividing them into similar groups—based on available data—gives you the ability to easily add some baseline individualization into your marketing messaging.

- ☐ **Reflect and Visualize Your Ideal Audience:** Just choose one. Otherwise, you'll get caught up in accomplishing everyday tasks.
- ☐ **Select Your Data Points:** Select your data points. Demographic? Lifecycle? Behavioral?
- ☐ **Build and Send a Test Campaign:** Define KPIs, put thought behind the templates, and A/B test.

## Lifecycle Mapping

Each customer is different. To develop an individualized marketing strategy, your team needs to plan for the chaos and design a lifecycle map that accounts for an infinite number of possibilities—it's not a funnel, it's a cycle.

- ☐ **Awareness:** Ensure new customers know who you are and not-so-new customers can learn more about you.
- ☐ **Consideration:** Use what you know about the customer to serve up individualized marketing messaging.
- ☐ **Purchase:** Consider the various choices a customer has to make a purchase: in-store, online, or through mobile devices.
- ☐ **Advocacy:** Collect the sentiments of your customers and use those insights to drive not only additional purchases from that individual, but other, new customers as well.
- ☐ **Loyalty:** Tailor each loyalty technique (rewards program, newsletter, etc.) for each customer.

## Journey Building

At Iterable, lifecycles are the stages where customers can connect with your brand. The customer journey, on the other hand, focuses on guiding the customer, using various touchpoints, to the next stage as they interact with your brand.

- ☐ **Enter/Exit Criteria:** Think about how a user enters and leaves the customer journey.
- ☐ **Timing:** Use both send time and time between messages to craft a custom experience.
- ☐ **Actions:** Consider send actions, user actions, and subscription actions when designing journeys.
- ☐ **Filters:** Employ fields match, A/B splits, and field splits to your journey steps to determine where a customer goes next.

## Dynamic Content

Dynamic content brings context to your individualization efforts. In the past, marketing messages were often a swath of sameness. Every person received the same message, regardless of their interests, needs, or wants. Today, marketing has evolved.

- ☐ **User Attributes:** Include demographic and personal information you have about each and every one of your customers as a baseline.
- ☐ **Event Data:** Analyze what their customers are doing, versus what they're saying.
- ☐ **External Data:** Add data feeds to pull external data into your marketing messaging.
- ☐ **Metadata:** Weave in metadata, which is defined as "descriptive information about your brand's product or service offerings."

All of that info may make individualization seem overwhelming, but really, we just want to equip you with all of the information you need to make your individualization efforts look—and feel—like magic.

To learn more about creating individualized marketing messages, check out the rest of the **"4 Steps to Make Individualization Seem Like Magic"** ebook. If you're interested in learning about how Iterable can help you achieve individualization, **schedule a demo** today.

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