Personalization Playbook

Actionable use cases
for omnichannel engagement

SAP Emarsys

Big Ideas, Real Results

Personalization today can feel like a never-ending sprint. Your to-do list grows faster than you can check things off, and just when you think you've cracked the code to engage your audience, their expectations shift. Marketers everywhere are navigating a rapidly changing landscape, trying to meet growing demands for new channels, real-time engagement, and results that don't just look good on a dashboard but truly drive business outcomes.

That's where our Personalized Playbook for Marketers comes in.

A Leader in Personalization Engine's according to the Gartner® Magic Quadrant™ 6 times in a row

Get the report

We've designed it to be as actionable as it is inspiring—leveraging real scenarios from our most successful customers. Think of it as your partner in tackling those day-to-day challenges, offering you both fresh ideas and clear, step-by-step advice to implement them. Need to build a campaign that re-engages dormant customers? It's in here. Trying to figure out how to create a seamless omnichannel experience that feels effortless for your customers? We've got you covered.
This Playbook is about answering the question 'how' — how to take an idea and turn it into a strategy, how to take a strategy and bring it to life.

We get it. The life of a marketer is busy, often chaotic, and rarely predictable. That's why this Playbook was created with empathy for the real-world pressures you face. Whether you're stuck in a creative rut, overwhelmed by too many challenges with too little resources, or simply need a fresh perspective, this resource is here to guide you forward.

Michael Jonas, Chief Customer Success Officer, SAP Emarsys

Pre-built Tactic Available

This indicates SAP Emarsys offers a pre-built marketing automation for the strategic tactic used in the play to get you started quickly. These can be customized to be as simple or as complex as you need to meet your business requirements.

Beginner

A marketer that understands the fundamentals and has started with entry level marketing automation channels like email.

Advanced

A marketer that has developed expertise in multi-channel strategic execution of marketing automations using data-driven insights.

Expert

A marketer that has mastered omnichannel campaigns and innovates with new trending channels and tactics.

Table of contents

Find your play by business challenge:

Find your play by use case:

Grow your database

Beginner

Encourage unsubscribed customers to resubscribe

Use Case:
During high peak sales seasons, ensure you take advantage of the heavy traffic of customers both new and old by encouraging them to opt-in to your email campaign and maximize your first party data.

**Retail | eCommerce | Consumer Products | Sports & Entertainment**

What to measure:

- 👥 Active customer base
- @ Email re-opt-in
- 💲 Revenue generated from email re-opt-in

" ...on the landing page for the Hot Sales season, we ask them through a sign-up form, what category are you interested in?
And then we store that in a database, and we send that information through an automation on the first day of the event. "

Mauricio Gonzalez, Online Experience Manager, The Home Depot
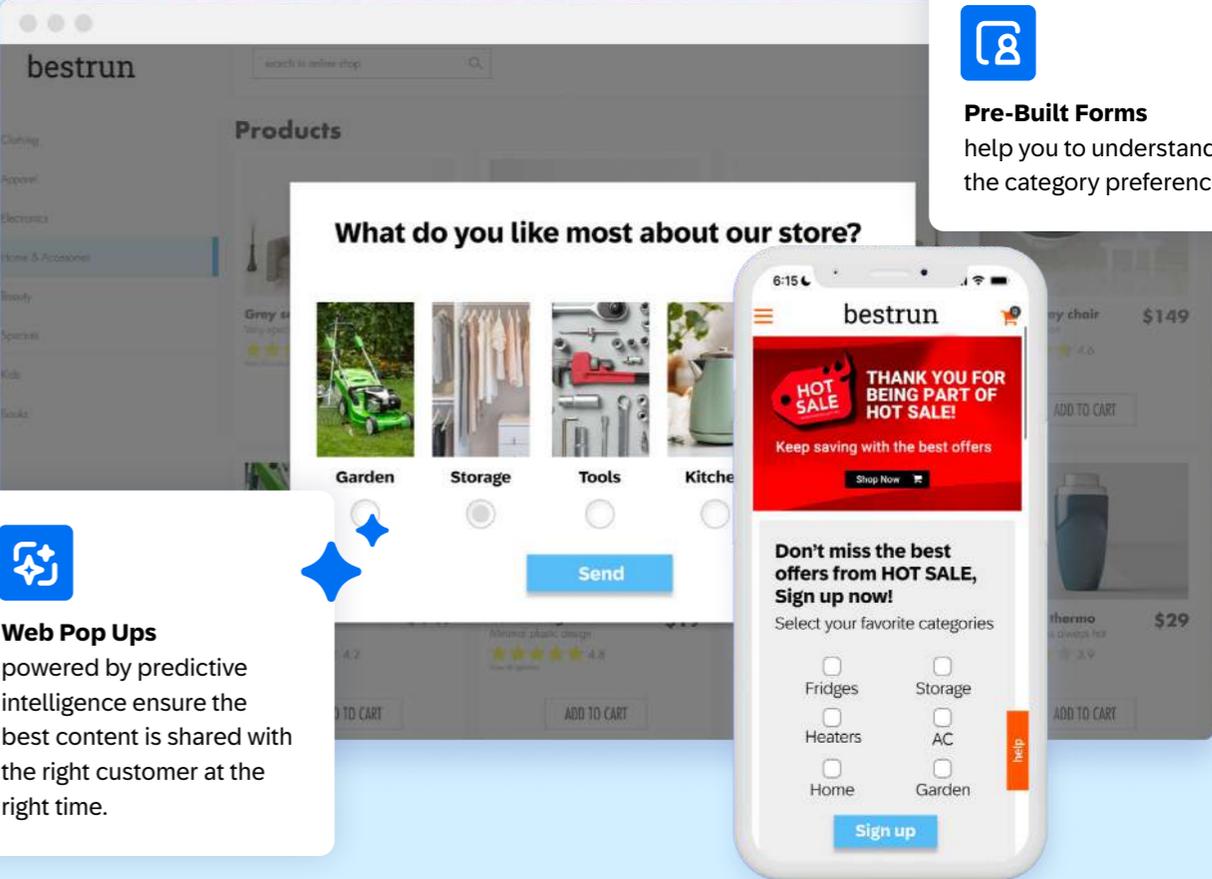
Pre-Built Forms help you to understand the category preference.

Web Pop Ups powered by predictive intelligence ensure the best content is shared with the right customer at the right time.

Encourage unsubscribed customers to resubscribe

Use **Send Time Optimization** to deliver a personalized follow up email at the time most likely to be opened.

Trigger the automation with a **customized form** to collect helpful information about your customers with a web pop up.

Once the form is completed, send a **personalized email** with content relevant to each subscriber.

Beginner

Encourage unsubscribed customers to resubscribe

Channels Included
- Web Channel
- Email

Solution
- Target customers in your database who are currently opted out or are unidentified. These are potential high value customers.
- Create a web channel form pop up, asking customers to re-optin, showcasing the value they'll receive including data transparency.
- It's important to set the value node used to update the opt-in field to True.
- Once opted in, automate a follow up email with personalized product recommendations and content based on their preferences.

Optional Resources
- **SAP Emarsys Services:** Strategy, Technical, Creative, Execution, Optimization

Pre-built Tactic Available

Advanced

Create an omnichannel progressive profiling opt-in experience

Use Case:
Gather data in stages rather than overwhelm prospective customers with lengthy forms. Build detailed customer profiles that enable personalized recommendations and services for an improved customer experience.

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What to measure:
🛒 First purchase
👥 Customer churn
💲 Active customer revenue

> SAP Emarsys has really become the center of how we orchestrate the conversation with our customers to deliver a more rewarding customer experience. And what's most important is we have a deep level of understanding of our customer than ever before. We're using the interactions that the customer has with our brand and using the products that they show interest in to drive a conversation with them...

Ellise Jones, Group Head of Loyalty, Total Tools
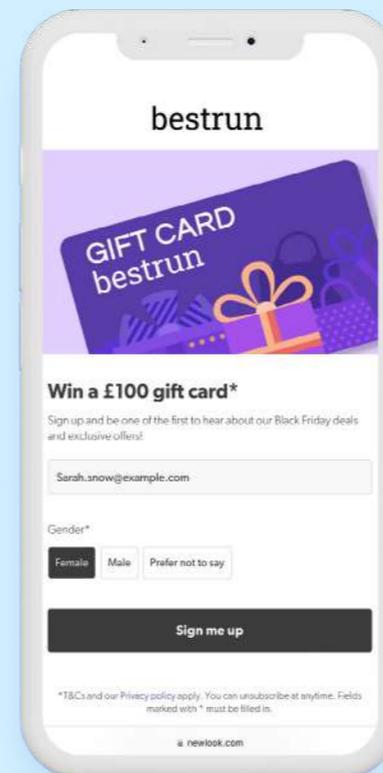
Capture the essentials   **Enrich their experience**   **Understand the customer**
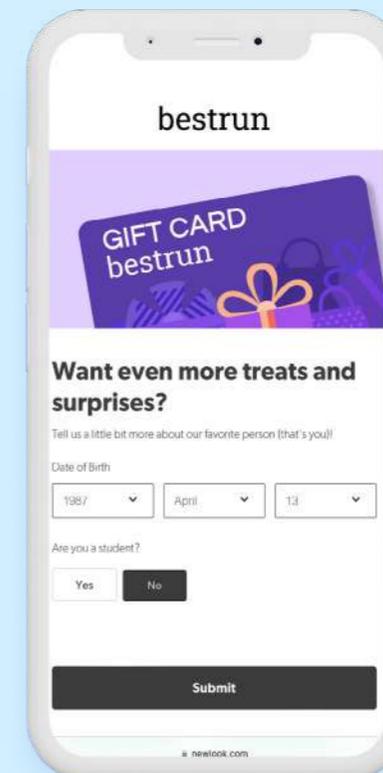
Use **personalized digital ads** to encourage engagement.

Create a participation check to make sure you have the best target audience to deliver a progressive profile opt-in experience.

Advanced

Create an omnichannel progressive profiling opt-in experience

Channels Included
- Email
- Digital Ads
- Web Channel

Solution
- Entry node is a purchase made that triggers an email follow up, digital ad and web channel message asking about category preferences.
- After a week, an automation triggers across channels asking questions to capture interest.
- Use email and web channel to capture SMS opt-in to help reach on-the-go customers.

Optional Resources
- **SAP Emarsys Services:** Strategy, Technical, Creative, Execution, Optimization

Pre-built Tactic Available

Drive Customer Engagement

Advanced

Launch a new product or offering

Use Case:
Introduce a new product to existing customers to generate excitement about the brand and the new product with a focus on meeting customers on their channel of choice.

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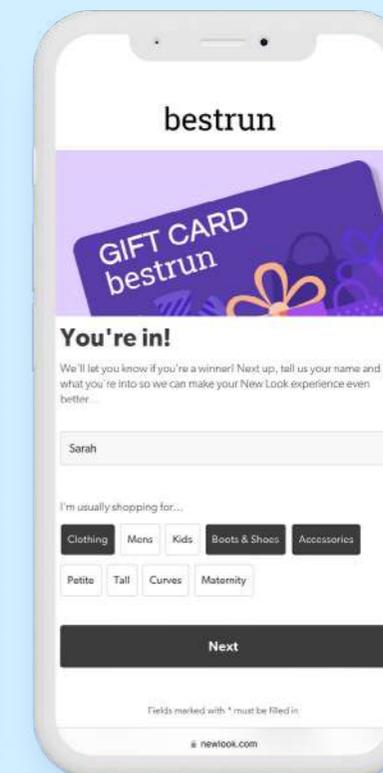
What to measure:

- 💲 Conversion & retention
- 🖥 Product adoption
- 👥 Audience growth

❝ For lifecycle marketing, we wanted to provide personalized experiences for increased conversion rate, develop segmentation strategies for improved retention and conversion, implement automation triggers to nurture current and future customers, and educate our existing audience and identify customer needs for this new product line. ❞

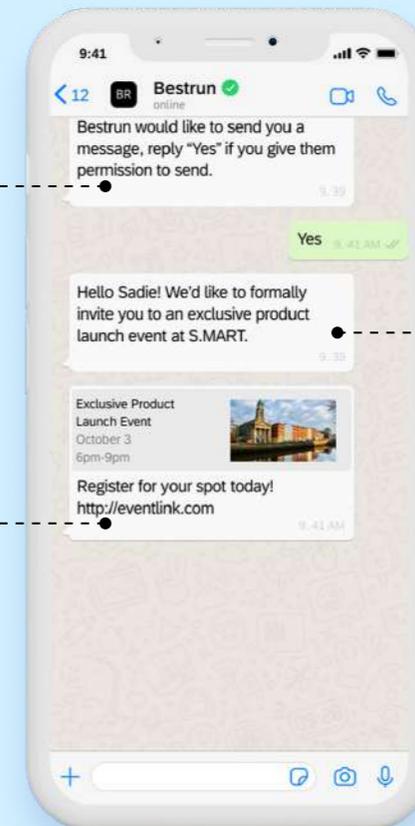Lyla Holt, Global Digital Marketing Manager, Consumer Care, John Frieda

AI Marketing
Predict your highest value segments by identifying overlap in customer affinity for similar products.
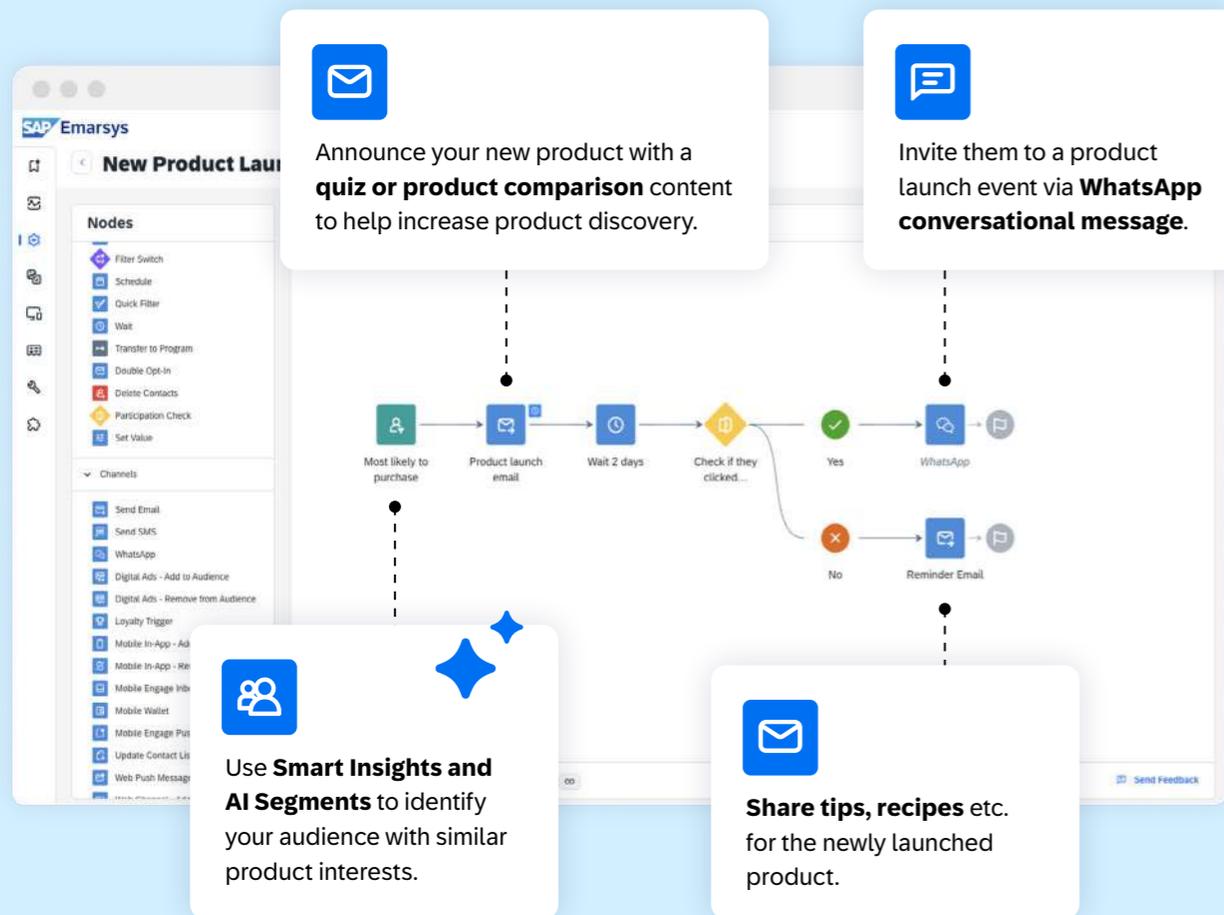
Automate WhatsApp messages to deliver personalized experiences.

Capture consent
and unlock a new revenue channel to engage your customers.

Announce your new product with a **quiz or product comparison** content to help increase product discovery.

Invite them to a product launch event via **WhatsApp conversational message**.

Use **Smart Insights and AI Segments** to identify your audience with similar product interests.

Share tips, recipes etc. for the newly launched product.

Advanced

Launch a new product or offering

Channels Included
- Email
- Conversational Channels

Solution
- Create a target audience segment that would be most interested in your new offering with Smart Insights and AI.
- Create Personalization Tokens & Content Blocks that you can reuse across channels and campaigns.
- Use our pre-built tactic for product launches to get you started, then personalize based on your goals & channels available.
- Include Send-Time Optimization to deliver messages at the right moment.

Optional Resources
- **SAP Emarsys Services:** Strategy, Technical, Creative, Execution, Optimization

Pre-built Tactic Available

Advanced

Deliver time-sensitive messages when a product is back in stock

Use Case:

Inform customers about popular products, tickets, and offerings that are back in stock, to drive immediate sales and increase customer engagement.
Take advantage of channels like SMS that can meet your on-the-go customers in the moments that matter most.

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What to measure:

👆 SMS click rate

🖥 Product adoption

💬 SMS opt-ins

" Today with SAP Emarsys, we can automate personalized experiences to deliver the perfect product that the customer was looking for based on the customer's behavior in the moment.
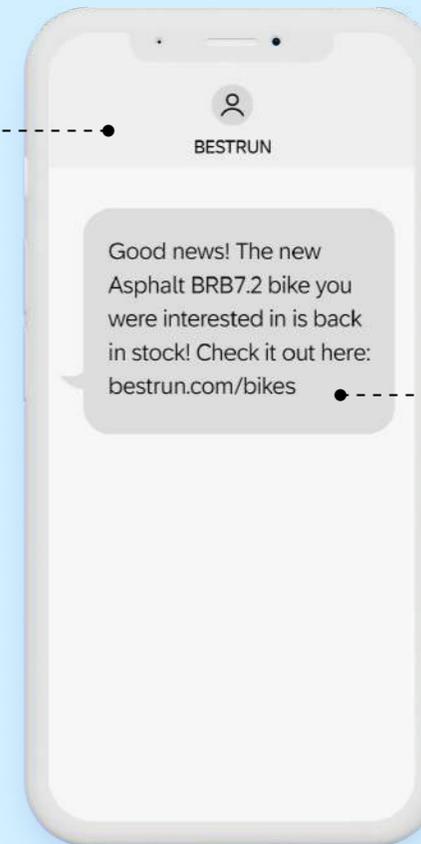For us, that has been very beneficial to build relationships and drive business results. "

Bárbara Schlindwein, CRM Lead for Arezzo Brand

Capture consent and unlock a new revenue channel to engage your customers.

BESTRUN

Good news! The new Asphalt BRB7.2 bike you were interested in is back in stock! Check it out here: bestrun.com/bikes

Personalize your SMS message by including the name of the product back-in-stock as well as a direct link to explore.

Send an SMS message to **drive a sense of urgency** for the newly stocked item.

Connect Emarsys to your **Commerce Product Catalog** to capture the latest products in-stock.

Let customers know an item is back in stock + **product recommendations**.

Advanced

Deliver time-sensitive messages when a product is back in stock

Channels Included
- Email
- SMS

Solution
- Check for updates on your product catalog on a daily interval and specify a back-in-stock change to trigger this automation.
- Target your audiences based on contact behavior where the customer has viewed the product in the past 5 days.
- Be sure to exclude contacts who have already made the purchase within the past 5 days.
- Deliver a personalized SMS messages for those opted-in to receiving SMS.

Optional Resources
- **SAP Emarsys Services:** SMS concept & writing, personalization & ESL, Transactional messaging, use case & automation creation

Pre-built Tactic Available
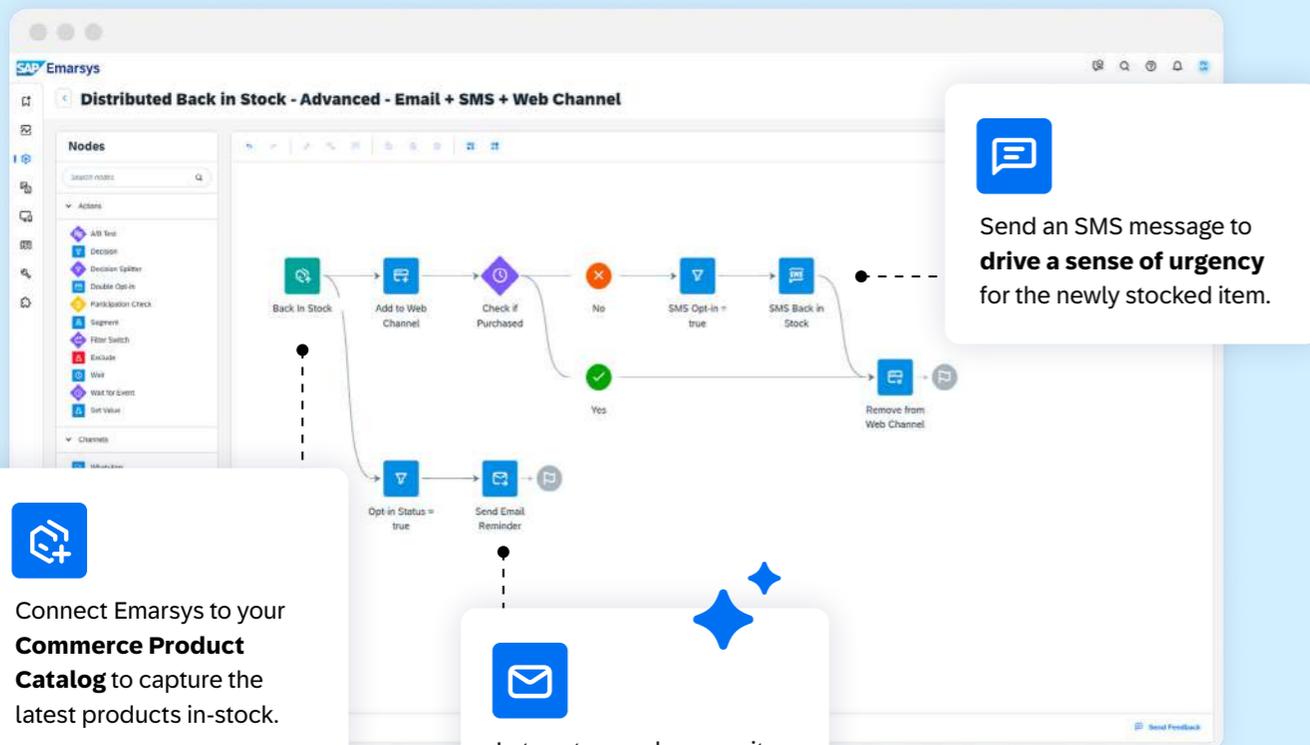
Increase Customer Retention

Beginner

Convert abandoned cart shoppers on your mobile app

Use Case:
Keep mobile app users engaged by reminding them of items they have left in their cart via a strategic series of push notifications over the optimal amount of time.

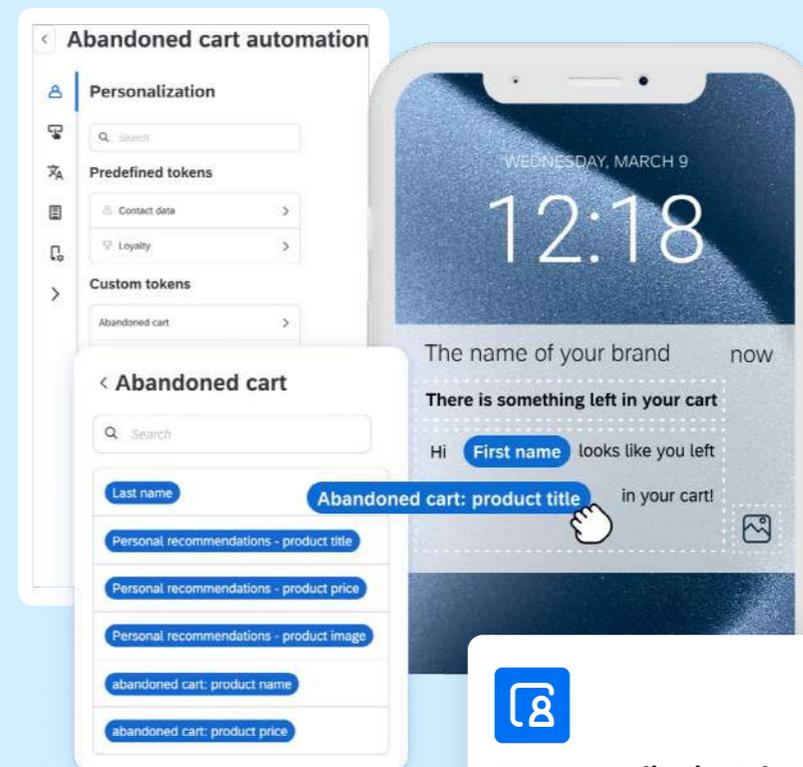**Retail | eCommerce | Consumer Products | Sports & Entertainment**

What to measure:

📱 Push notification open rate

💲 Revenue from event attribution

🛍️ Abandoned cart conversion rate

> "[Mobile Engage] allows us to reach more contacts with our triggered app messages such as Abandoned Cart or Wishlist messages. Especially the Abandoned Cart program is showing pretty good results with an Open Rate of 8% and a Conversion Rate of 10.5%."

Franziska Fischer, Senior CRM Manager, NBB (notebooksbilliger.de)

Use **personalization tokens** to easily promote the product abandoned.

Personalize the push message with the product name & imagery.

Trigger an automation from a **mobile app abandoned** cart event.

Beginner

Convert abandoned cart shoppers on your mobile app

Channels Included
- Mobile Push

Solution
- Trigger a cart abandoned custom mobile event for this automation.
- Isolate only app users and target both anonymous and known customers.
- Send a cart abandoned push notification.
- Deliver a reminder notification if no purchase has been made.

Optional Resources
- **SAP Emarsys Services:** Mobile Push concept & writing, design & execution, personalization & ESL, transactional messages, automations/interactions, in-app templates, geofence & beacons

Pre-built Tactic Available

Advanced
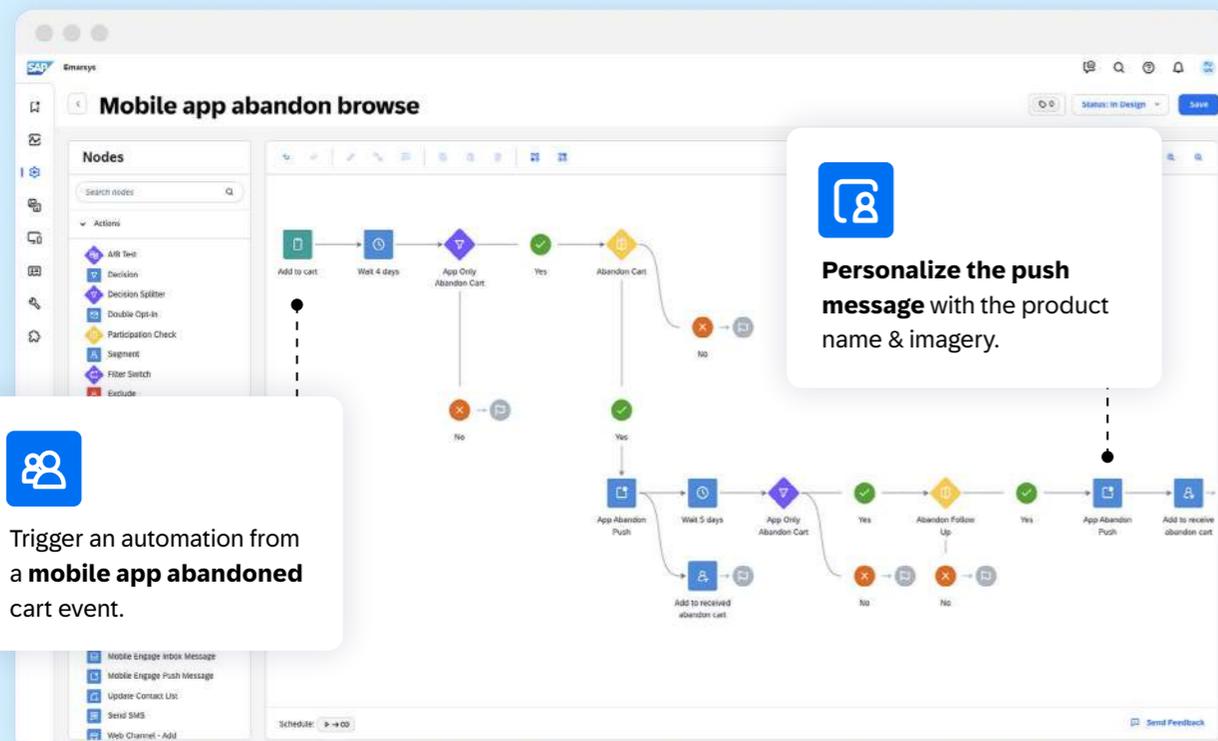
Reactivate inactive loyalty program members

Use Case:
Reignite interest among inactive members. This use case transforms passive audiences into active participants with targeted messages that drive action and build loyalty.

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What to measure:

- Customer churn
- Purchase frequency
- Premium customer revenue

"The SAP Emarsys platform and loyalty solution offered versatile ways of connecting with our customers across dynamic touchpoints. This also provided valuable insights into customer behavior both online and in-store through enriched first-party data. Our strategy centered around leveraging these valuable customer insights and robust first-party data to drive better personalized experiences for our customers."

Mike Cheng, Head of Digital, City Beach

Send a timely **mobile in-app or push message** automatically alongside a personalized email.
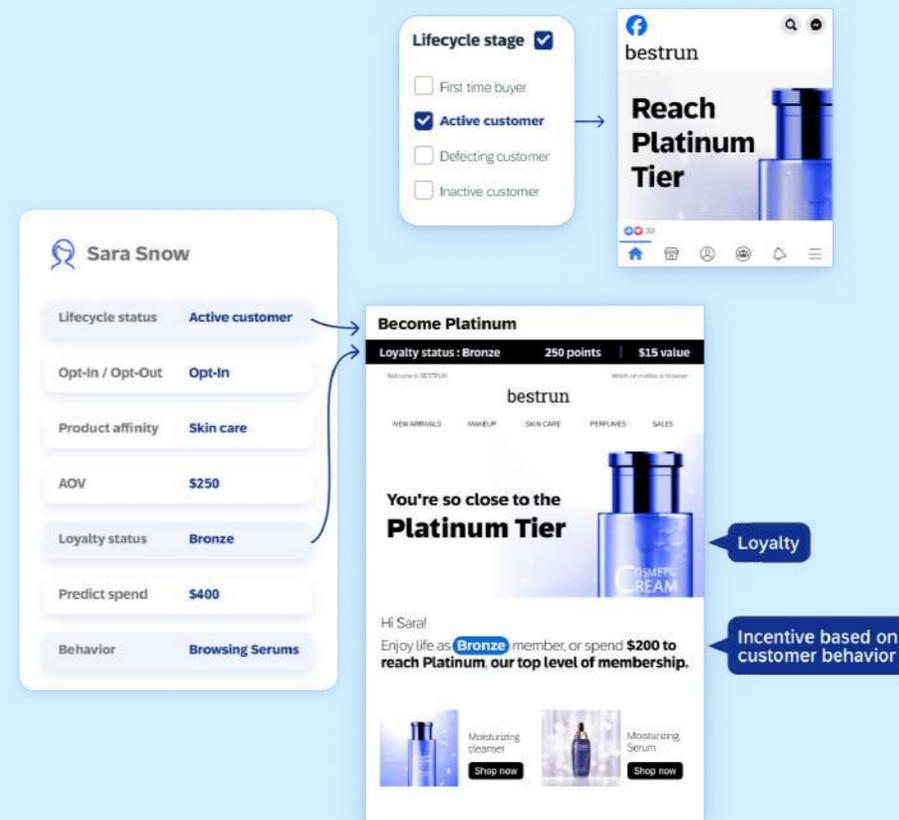
Advanced

Reactivate inactive loyalty program members

Channels Included

- Email
- Mobile In-App
- Mobile Push

Solution

- Every month, trigger an email send to a loyalty segment of members with no activity in the last 30 days
- Use personalization tokens to personalize incentive email
- Follow up with a reminder email to same audience segment 12 days later

Optional Resources

- **SAP Emarsys Services:** Strategy, Technical, Creative, Execution, Optimization
- **Partner:** Annex Cloud Integration

Pre-built Tactic Available

Expert

Drive leads from online to in-store for first purchase

Use Case:
Help your customers research online then point them to an offer they can redeem by adding directly to their mobile wallet, allowing for easy and convenient in-store identification, richer customer insights, and frictionless customer experiences.

Retail | Consumer Products
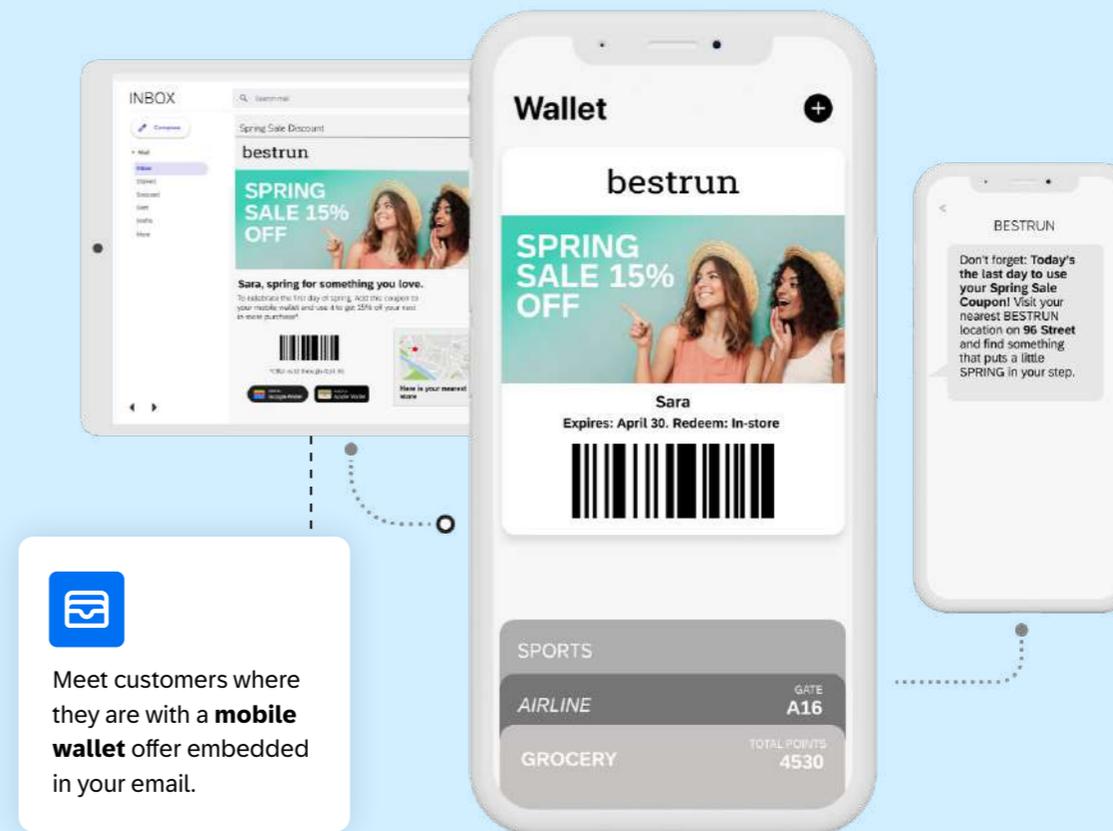
What to measure:
- In-store or event engagement
- Mobile wallet downloads
- Mobile wallet redemption

" Mobile is the one channel that's always with the customer, so it's an important part of our omnichannel mix. Mobile Wallet in particular allows us to reach customers anywhere they're at, which unlocks a whole new set of use cases to better connect our digital and in-store experiences. "

James Neill, Customer Lifecycle Manager, City Beach Australia

Meet customers where they are with a **mobile wallet** offer embedded in your email.

Include a **mobile wallet offer** within your email to redeem in your store or at your event.

Create a **reccurring filter** to automatically update your audience daily.

Use **AI to predict** which leads are most likely to engage online.

Expert

Drive leads from online to in-store for first purchase

## Channels Included
- Mobile Wallet
- Email
- Digital Ads
- Web Push

Solution
- Create a mobile wallet campaign with a voucher to redeem in store or at an event.
- Build a segment for this automation and set up a reccurring filter.
- Use filter switches to predict whether the customer is most likely to engage online or via email.
- Can optionally add multiple waiting periods to test the optimal time period to be in a web or digital ad campaign.
- Refresh your list to remove dormant customers and focus on the hottest leads.

Optional Resources
- **SAP Emarsys Services:** Strategy, Technical, Creative, Execution, Optimization

Pre-built Tactic Available
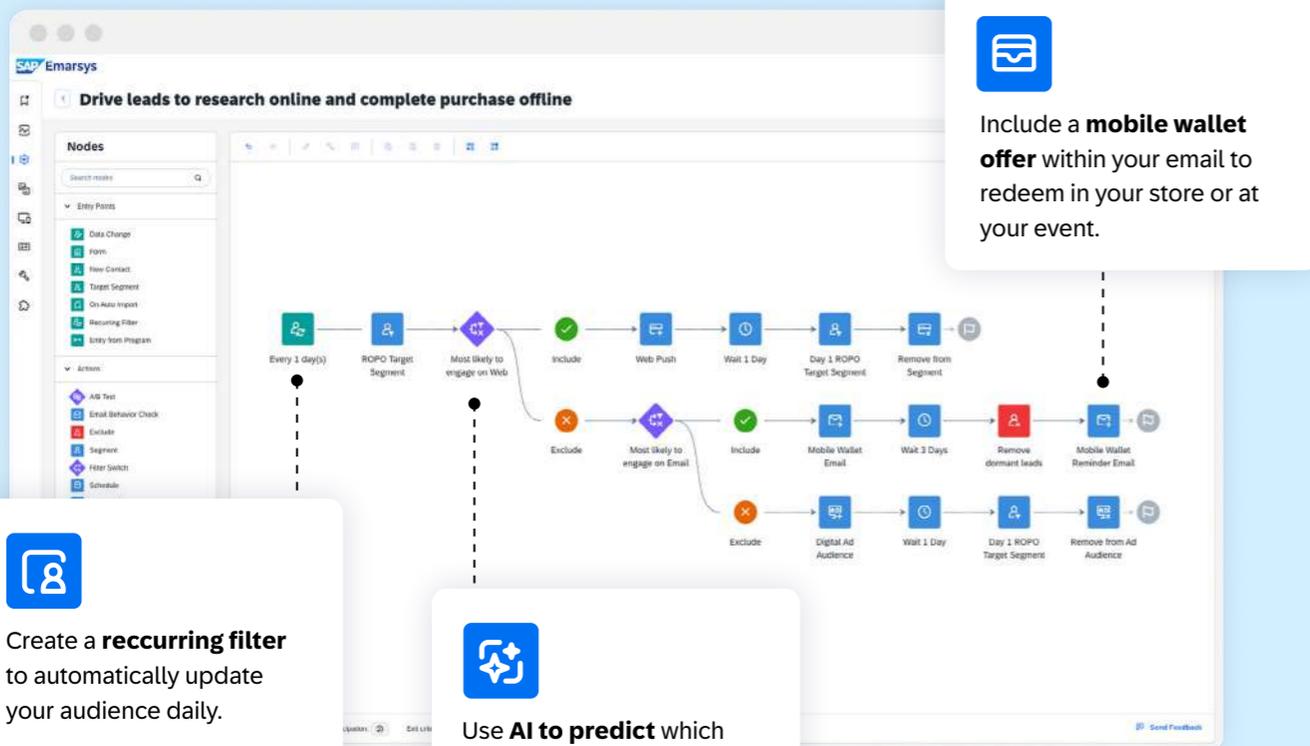
Get to know SAP Emarsys

See personalization in action with our 3-min demo video.

Watch now

Looking for ways to expand your omnichannel personalization?

Extend your capabilities, unlock additional value, and add the functionality you need to scale through the extensible SAP Emarsys Partner Ecosystem.

Discover now

Ready for hands-on support to turn your vision into reality?

Our Services Team offers expert support to help you implement the ideas in this playbook and more to drive real impact.

Learn more

Go Time!

The work doesn't stop with the Playbook — in fact, this is just the beginning. Now it's time to take action, turn insights into strategies, and strategies into results. Wherever you are in your marketing journey, SAP Emarsys has the tools and support to help you go further.

Marketing success doesn't happen overnight, but with the right tools, partners, and guidance, you'll be ready to tackle any challenge. Let's take this journey together and make your next big move count.

SAP Emarsys

SAP Emarsys is the customer engagement solution of Intelligent CX from SAP, empowering businesses to deliver personalized, AI-driven, omnichannel experiences. Built for scalability and extensibility, Intelligent CX from SAP integrates commerce, sales, service, marketing, and customer data, enabling businesses to exceed customer expectations with real-time, relevant engagement. From digitally native disruptors to global enterprises, SAP Emarsys helps bring out the best CX in every business by meeting customers where they are with the products, information, and experiences they need, exactly when and where they need them. For more information, visit www.emarsys.com