Email Personalization Capabilities within Marketo Engage

Tori Forte, Adobe Professional Services

What does Personalization mean to you?

Agenda

- Personalization Options for Email – Tokens, Email Scripting and Dynamic Content
  - **Overview of Capabilities**
  - **Pros and Cons**
  - **Use Cases**
- Demo Each Option in Marketo Engage
- Q&A

Personalization within Marketo Engage

Personalization is the customization of content and/or experiences to an individual person or group(s) of people, to improve audience experience.

Individual Asset Personalization → **Campaign Personalization** → **Lifecycle/Funnel Personalization**

Email Personalization

Three tools we'll cover today to create personalization within Marketo Engage:

- Tokens

- Email Scripting

- Dynamic Content

Tokens Overview

Token Types:

- [Person Tokens](#)

- [My Tokens](#)

- Company Tokens

- Campaign Tokens

- System Tokens

- Trigger Tokens

- Program Tokens

- Member Token

Token Personalization Examples

- First Name Personalization in Subject Line

- From Name Personalization of Sales Rep/Account Executive

- Event Details - Calendar File, Date, Speaker Details
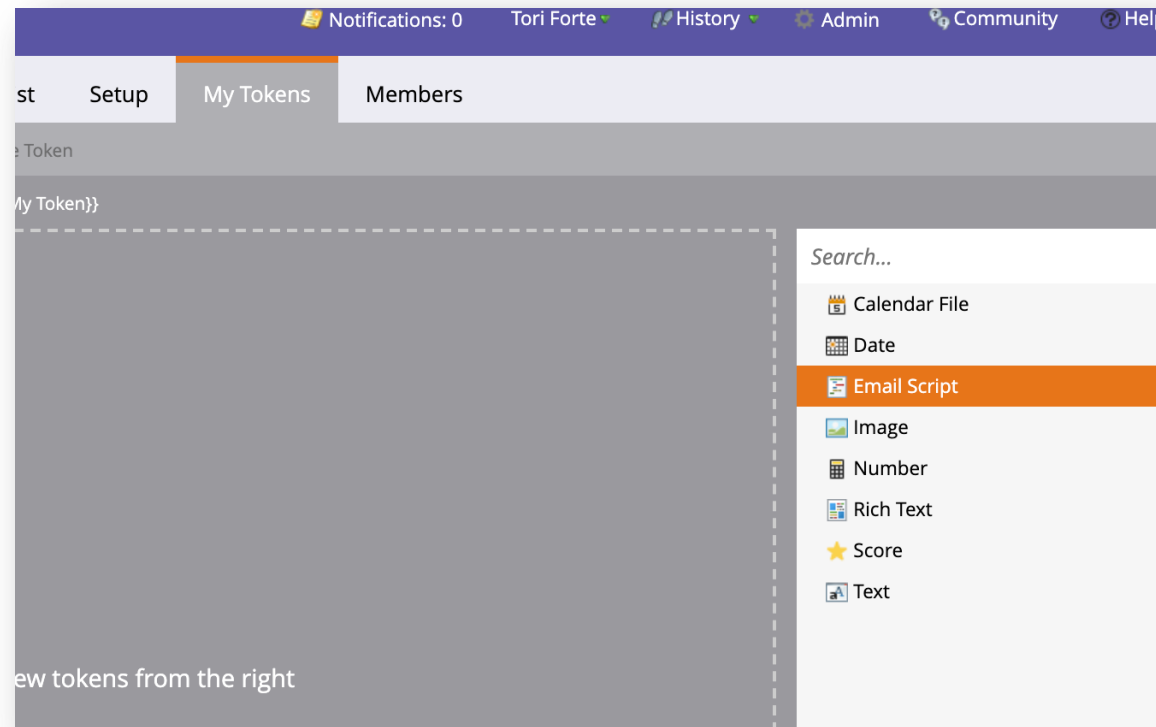
Tokens Pros and Cons

- Pros
  - Can personalize to the individual, campaign or asset
  - Easy to use and test

- Cons
  - Personalization is only as strong as the data you have

Email Scripting (Email Script Token) Overview

The Email Script token allows you to leverage velocity scripting to drive personalization of content within your Marketo Engage email, leveraging data stored on a custom object.

Email Scripting Examples

- Sales Lead Notification – Daily Batch

- Abandoned Cart Email

- Content Summary Request

- Tradeshow Reminder Email – Summary of Registered Sessions

Email Scripting Pros and Cons

- Pros
  - Allows for more complex, robust personalization
  - Allows you to leverage data stored within a custom object to drive personalization

- Cons
  - Need to understand scripting to execute

Dynamic Content Overview

Dynamic content leverages Marketo Engage Segmentation to display content differently to people based on your business rules.

Assets that can use dynamic content:

- Emails
- Landing Pages
- Snippets

Segmentation Overview

Segmentation is a specific functionality of Marketo Engage that leverages data within your database to drive Dynamic Content. Key items to consider when using Segmentation:

- Each Marketo instance is allowed up to 20 segmentations and 100 segments within each of segmentation

- Person can reside in only 1 segment at a time

- Order of segments matters – person reside in the first segment they match

- When a segmentation is created, Marketo will automatically create a system field with the name of that segmentation – you cannot edit the values of these fields

Adobe

Dynamic Content Examples

- Global Email with Content translated per Language

- Banner Image changed by Industry

- Subject Line changed by Persona
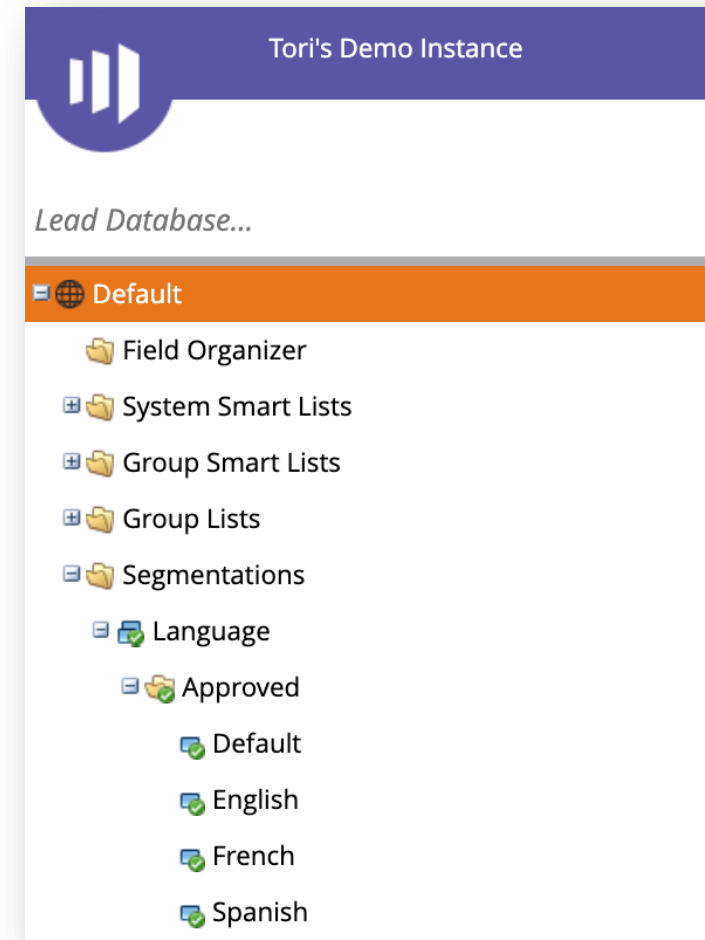
Dynamic Content Pros and Cons

- Pros

  - Personalization at scale (can reuse segmentations and dynamic content by cloning)

  - Preview capabilities: you can see each segment's content within the Email Preview

  - All content edits done within email editor

- Cons

  - Segmentation must be approved and have run prior to the email send (plan at least 1 day in advance for testing)

  - Reporting will show the person's *current* segment, which could be different than the segment they were in when the email was sent

Demo Time!

Q&A