Personalized Emails

Send personalized emails directly from Personyze.
**Why use personalized emails?**

Read more details on [how to execute an email campaign here](#).

**Note:** Email broadcasting requires a paid account, not available with the free trial.

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**EASY SETUP**

Setting up Personyze to send from your own email address is easy, there's a simple email verification, and then you're ready to go.

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**RICH FEATURE SET**

Personyze email broadcasting includes:
- Email drip/workflow functionality
- Wide variety of email algorithms
  - Products like those you viewed
  - Accessories to your recent purchase
  - Newest from your favorite topic/author
  - Most popular this week
- Dynamic variables like first name, account info, company name, etc.

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**REAL-TIME RECOMMENDATIONS**

Each visitor sees the recommendation that's most relevant for them based on their most recent product or content interactions.
Personalized email setup process

Note: Personyze must first be activated on your site. Installing Personyze involves a 5-minute or less copy/paste of our tag to your tag manager, and requires no dev work. Read how to do so here.
For any recommendations to work, you'll need to have your feed uploaded/synced. This will usually be a part of your onboarding. Read more here

Personyze needs to be tracking the interactions that users are having with your products/content. This is standard onboarding setup. Read more here

This is only relevant if you plan to filter your algorithms with CRM data. For instance, "Show most popular among users with CRM variable X." Read more here

Recommendation Preliminaries
All these preliminary elements are standard onboarding, one-time setups usually handled by your account manager.
Step 1: Set Recipients, User List

Import options

Total users on your account, use this to create filters, for example show only email = not empty, to see only users whose emails you have.
Personyze emails can be sent to a user list, or visitors you choose through targeting.

**Step 1: Set Recipients, Targeting**

You can use different targeting rules such as CRM data or last product interaction, etc.

- Set User: Subscriber Contains YES
- Add rules for User List (profile data), Days till birthday, etc.
- Include Product interactions: Purchased Any product Distinct products ≥ greater than or equal to 1 and less than 10 days

Changes not saved yet:
- Update audience
- Create action group Rotation group A
- Add action: Forgotten Cart Email (after 2H) to Returning Visitors to group Rotation group A
- Create action group Rotation group B
- Add action (unverified) to group Rotation group B
- Delete action Forgotten Cart Email (after 2H) from group Always shown
- From group Always shown

Your campaign is targeting:
- Include User: Subscriber Contains YES
- Include Purchased Any product Distinct products ≥ greater than or equal to 1 and less than 10 days

Rotation among 3 action groups:
- Always shown (no actions), Rotation group A (50% of users, 1 action), Rotation group B (50% of users, 1 action)
Step 1: Triggers

Emails are typically triggered in 3 ways:

- Site visited
- Cart abandoned
- Form submitted

For example, in e-commerce, you can show them a popup offering to send them their cart, the items they recently viewed, or a coupon code, and the email will send immediately after they submit the form.
Step 1: Sender Settings
Here you have various settings for how email should be sent, from which address, etc.

New action: Products recommendation by email

1. Recommendation type
2. Sender settings
3. Email look
4. URL parameters

You can send using Personyze server, or you can use different Mail Server settings that use the standard SMTP protocol.

- **Send using** + Add new mail or webhook provider
- **Use Personyze mail server**
- **Mail provider (SMTP)**
- **Webhook (HTTP POST)**

"From" email address

Subject

Broadcast service: from which email address or provider this campaign is going to be sent?
Step 2: Choose a Widget

Next, you'll be directed to select one of a few different types of email campaigns. The webhook option is for triggering emails in a third party platform, by sending a webhook.

Emails that include dynamic recommendations, such as “Recommended for you based on other users like you” or “Items left in your cart,” etc.

In this content widget, you set the email content with no dynamic recommendations. You can still use dynamic variables, such as account values, first or last name, etc.
Step 2: Algorithm

If you selected an email with recommendations, Personyze has algorithms for both products and content.

Some popular email algorithms include:

- Products like those you recently viewed
- Accessories to your recent purchase
- New content from your favorite topic
- Most popular content this week
- New from your favorite writers

Read more about Personyze algorithms.
Step 2: Template

Next is the design of the email itself. The first step is choosing a template, or uploading your own.

All Personyze templates are responsive.
Step 2: Email Design
Use our HTML editor to edit one of our templates, or your own design.

Select the element and see edit options
Click on the element to edit its content
You have the option to directly edit the HTML
Step 2: Dynamic Variables

Personyze variables can be inserted into the email content, for example first name, company name, or account details.
Step 2: No Recommendations Designs

Personyze can also send emails with no recommendations.
Step 3: Timer Settings

Here you determine exactly when the email will be sent, and what limitations it should have.

You can time the email to be sent after another event has taken place, such as a form submit or an item added to the cart.

In this email, we are setting it to send only at 8AM in the visitor’s time zone, and not on Saturday or Sunday, only when a visitor added a product to their cart at least one hour ago. We’re also setting it to wait 3 days before sending another.

The limitations on this email campaign are to wait 3 days from one email to the next, and don’t send more than 6 total for the same user from this campaign.
Step 3: QA
Here you can send test emails, view what emails will look like if sent, review sent emails, and see the interests and data that are feeding the recommendations and variables.

In the QA step, you can preview exactly what emails and their content will look like if they are sent to any given user, and also review what sent emails looked like.
Step 3: QA

QA for emails, allows you to see what the recipient will see and why, such as detailed user info, as well as user activity on the site.
Preview on a phone or tablet

Send cross-selling recommendations

Purchased item with recommended cross-sell items that are usually bought together
Review Performance

Once your emails are sent

Reading the data:
Review the number of emails sent, view rate, clicks, click rate, etc. For ecommerce emails, you can also track the add-to-cart clicks, purchases, as well as a detailed log of each user’s activity after clicking through the email to your site.

Revenue tracking as well as conversion and KPI tracking is available for email campaigns.

Read more about Personyze analytics here
It's as simple as that!

If you'd like help with your personalized emails, let your account manager know.

Or simply email: support@personyze.com

Thanks for viewing our presentation.