

15 Ways to Use Data to Engage Your Customers





15 Ways to Use Data to Engage Your Customers

Brought to you by Segment, SendGrid, and Twilio

Together, Twilio, SendGrid, and Segment provide the building blocks you need to engage your customers across every step of their journey.

Customer data is becoming useful in more and more ways—from sending [personalized emails](#) to powering proactive [SMS](#).

Long gone are the days when personalization meant simply adding in a recipient's name in the greeting of an email. We now need to cater our messages to the individual, providing content that matches their specific taste, channel preferences, time zone, and spending habits.

At first glance, it feels like an impossible task to create individualized communications. But with the right tools and strategies in place, engaging the right person with the right message at the right time becomes a seamless part of creating nearly any campaign.

This guide outlines 15 ways you can use data to conquer your customer engagement strategy at different stages of the customer lifecycle. From enticing new customers, promoting recurring purchases, and bringing back inactive users, we'll show you various use cases to keep your customers connected to your brand and coming back for more.





What data you should be tracking

Before we get into the strategies you can use to engage your customers, let's set the stage and answer: what customer data should your business be collecting, and why?

When getting started with data collection, the obvious first step is to...look at the data. It might sound counter-intuitive, but this is the wrong place to start.

Instead, you should look inwards. What are your business objectives? Understanding your business goals will help focus your data collection.

Regardless of company size, our most successful customers start their data collection journey with a concrete set of business questions. If you are a retail or e-commerce company, here are some broad questions you might be trying to understand:

- What products are visitors clicking on most?
- Where are people dropping off in our checkout flow?
- How do I re-engage people who abandoned their carts?

Armed with these questions, a customer data platform like [Segment](#) will help you collect the precise data you need to answer these questions and use that knowledge to power your customer engagement strategy.

Now that you have your business objectives in mind, let's walk through what you can do to engage your customers at every step of their journey.



ENGAGE WITH BEST PRACTICES

Knowing how your customers engage with your business is the first step—the second step is to start engaging with them in better, more productive ways. Use the [2020 Global Messaging Engagement Report](#) to find out how customers want to engage with your business.





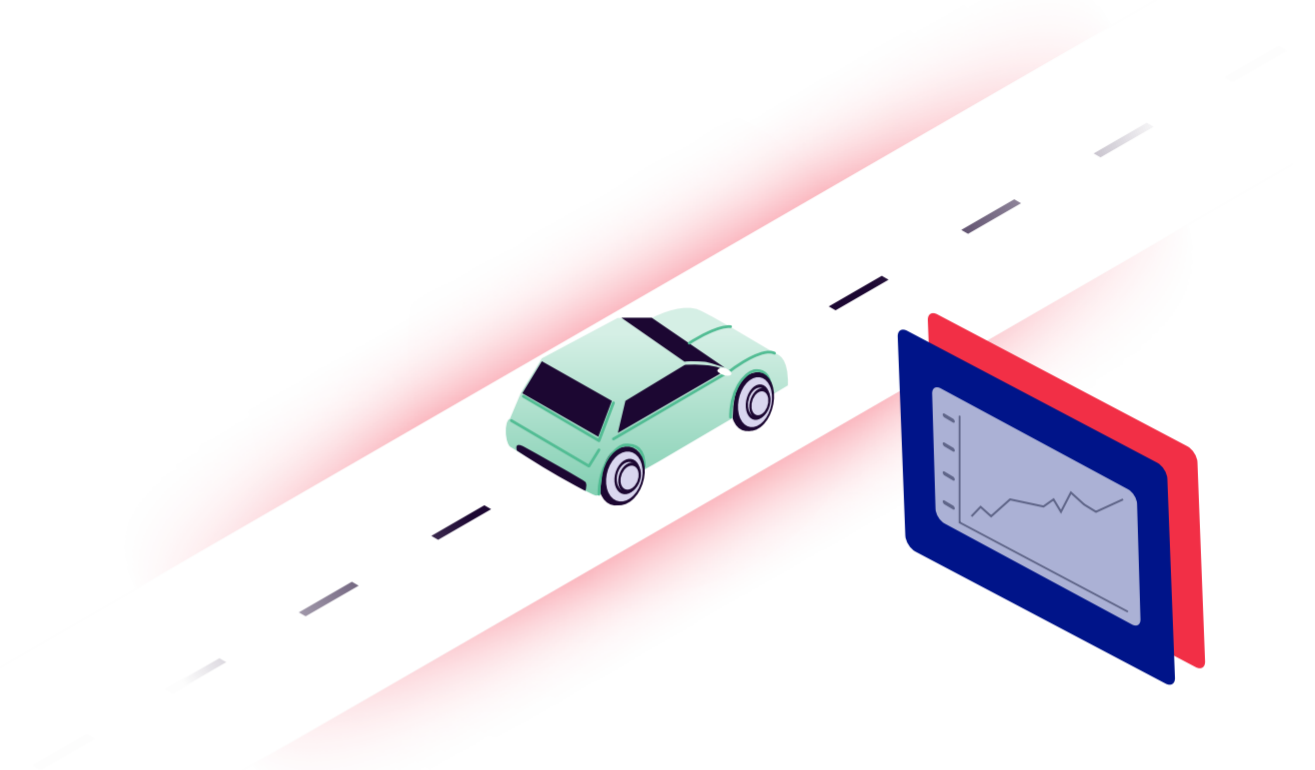
How to engage new visitors

Retaining loyal visitors and customers is key to the success of all businesses, but we can't take for granted the value provided by new visitors. From the moment a new customer visits your site, they provide you with a wealth of information and data about themselves.

1. Start by building customer profiles

Every time a new visitor checks out your site, they leave behind a wealth of information about their habits, preferences, and purchasing behaviors. Use these initial data points, like product searched or promotion viewed, to build comprehensive customer profiles for retargeting and future campaigns.

No two customers are alike, and it's important to treat them as such. Building out thorough customer profiles can help you dig into exactly what your audiences are looking for and how best to serve their interests.



CUSTOMER DATA YOU SHOULD TRACK:

Browsing events like "Products Searched"

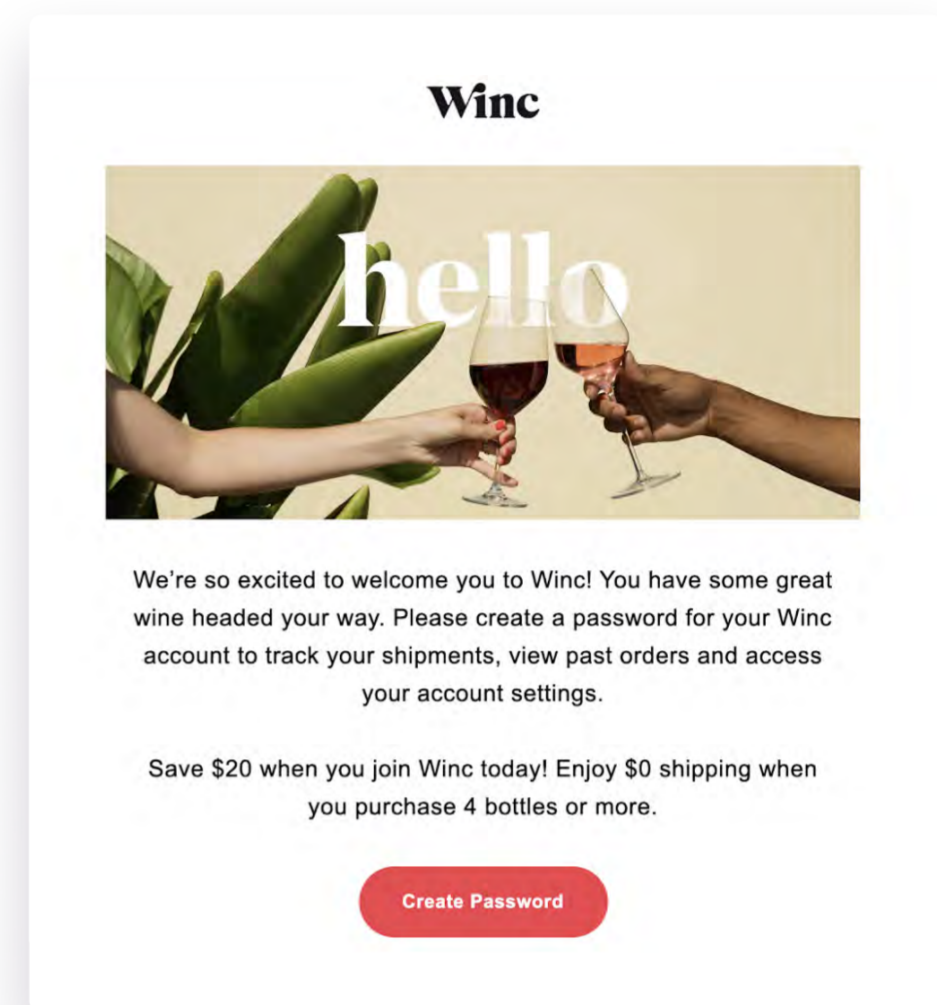
Behavioral events like "Promotion Viewed"

2. Push for account creation

New visitors are more likely to fall out of the sales funnel than returning customers or visitors. It's important to get users registered with accounts and continue to engage them to keep them active. Many ecommerce sites encourage new visitors to provide their email address or phone number in exchange for a discount. Others encourage account creation to better organize customer data.

Account creation is an invaluable step in the process of converting new visitors into frequent customers. Getting customers registered with your business allows you to access and manage their data in one central location.

Having their contact information readily accessible in an account is crucial in pulling them into the nurture campaigns that keep them engaged with your business. Sending new visitors reminders to complete account set up (like the email example with Winc) helps to push them through the funnel and keep your business top of mind.



CUSTOMER DATA YOU SHOULD TRACK:

Identity traits like "AnonymousID" (for those that haven't created accounts yet)

Behavioral events like "Email" and "UserID" (once an account has been created)

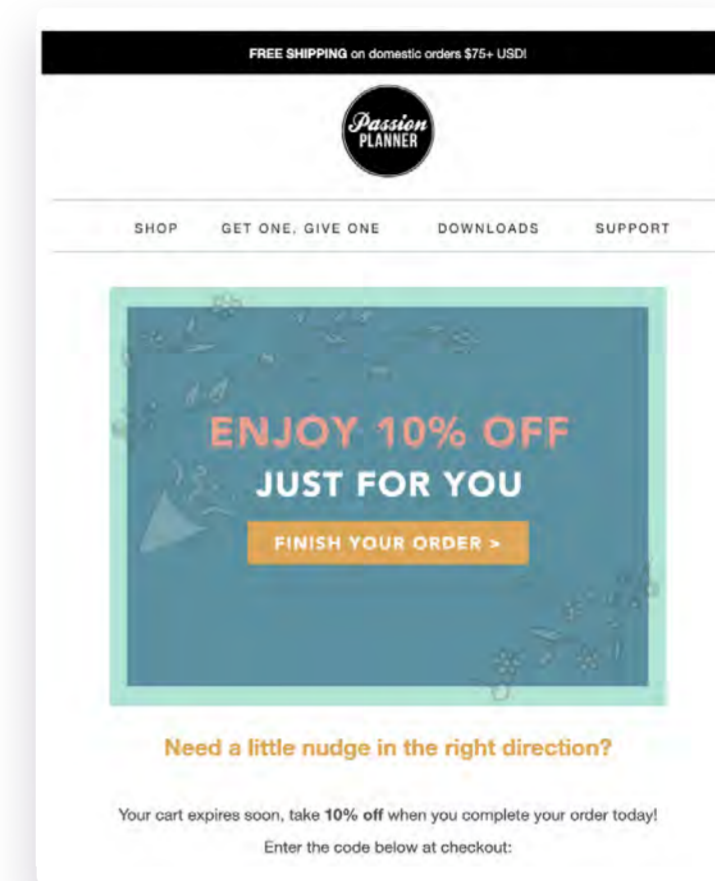
3. Nurture new visitors


It can be easy to get complacent once new visitors have created accounts, but account creation doesn't equal investment in your business. It's vital to nurture these new visitors to convert them into returning customers.

This kind of [email nurture campaign](#) doesn't have to be overly complex. Here's an outline of what a nurture campaign could look like:

1. Start with a [welcome email](#) that identifies the remaining steps in the account creation process or with an abandoned cart reminder.
2. The next email in the campaign could be a discount or sale of some kind—this could be a discount code (like the example from Passion Planner) or a reduced subscription cost for a limited period.
3. Then, provide educational information like directions on how to use a service or best practice tips for new users and visitors.

To create nurture campaigns, identify where a group of customers is in the conversion process and how you'd like them to proceed. No matter how you choose your target audience, here are a few metrics you'll want to track regularly.




CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like “Signed Up” or “Subscription Started”

Identity traits like “Premium Plan” or “Free Plan”



4. Predict patterns among site visitors

Another great way to nudge new visitors through the funnel is to utilize predictive user actions. [Predictive user actions](#) use data to determine consumer decision-making patterns and estimate what could convert leads into sales.

Although visitors may not always opt-in, you can utilize behavior scores and actions taken by users and create automated, personalized nurture campaigns based on those actions.

Let's use a visit to your pricing page as an example.

A visit to your pricing page is typically a good signal of intent, so an effective campaign based on this action could include [sending triggered emails](#) based on specific actions taken on the pricing page.

These actions could include:

- Spending 30 seconds or longer on the pricing page
- Visiting the page 3 or more times
- Showing other signs of intent particular to your business

By identifying and nurturing a specific audience, you're more likely to convert leads into sales.

Alternatively, you might find a visitor is spending a lot of time on your integrations or documentation page. In that case, you could follow-up with a triggered email that asks if they have any questions about specific integrations or how-to documentation.



CUSTOMER DATA YOU SHOULD TRACK:

[Referring domains](#) like Facebook ads, email, or pricing page

[Contextual traits](#) like "Time Spent On Page"



How to encourage ongoing purchases

Most of us have a couple of brands we religiously monitor, opening every email, eagerly awaiting seasonal sales, and whipping out our credit card when a new line or product is released. For these brands, we're loyal customers.

While it's important to bring in new customers, it's incredibly valuable to keep your regulars engaged with fresh, personalized communications. And what's the best way to create personalized experiences? Leverage the right data.



SEGMENT YOUR EMAIL LIST

Segmenting emails, a tactic every email marketer should (and can!) master, produces relevant and valuable messages that your recipients are more likely to read and respond to. Email segmentation helps you to take your messages from an email blast "one-to-many" approach to more of a "one-to-one," personalized communication. Get started with [The Essential Guide to Email Segmentation](#).

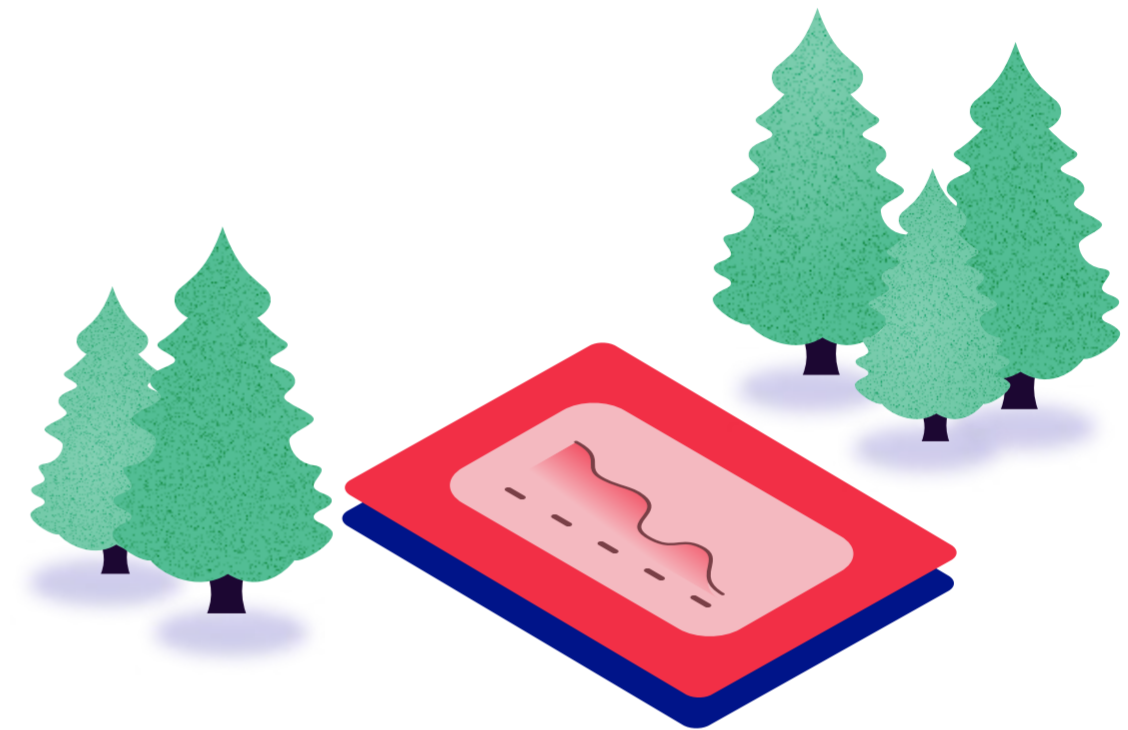
5. Match your messaging with your customers' interests

Have you ever been targeted with ads or sent emails that are completely opposite from your interests? Maybe you've received ads for dog food products when you only own a goldfish or for winter coats when you live in Hawaii. These incorrect assumptions can lead to a quick unsubscribe and deter you from purchasing that company's products.

To avoid any misinformation, try using a tool like [Segment Personas](#) to track customer preferences. With Segment Personas, you can keep tabs on all of your customer's interactions across channels, understanding their preferred type of product, size, and even their favorite color.

The more granular you get, the more likely you are to help your customer find what they're looking for.

Once your customers' profiles have been built, try sending a campaign that groups similar items to what your customer has been clicking on. You could provide a small discount on this category or offer free shipping to persuade your customer to make the additional purchase.



CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like "Order Completed" or "Product Added"

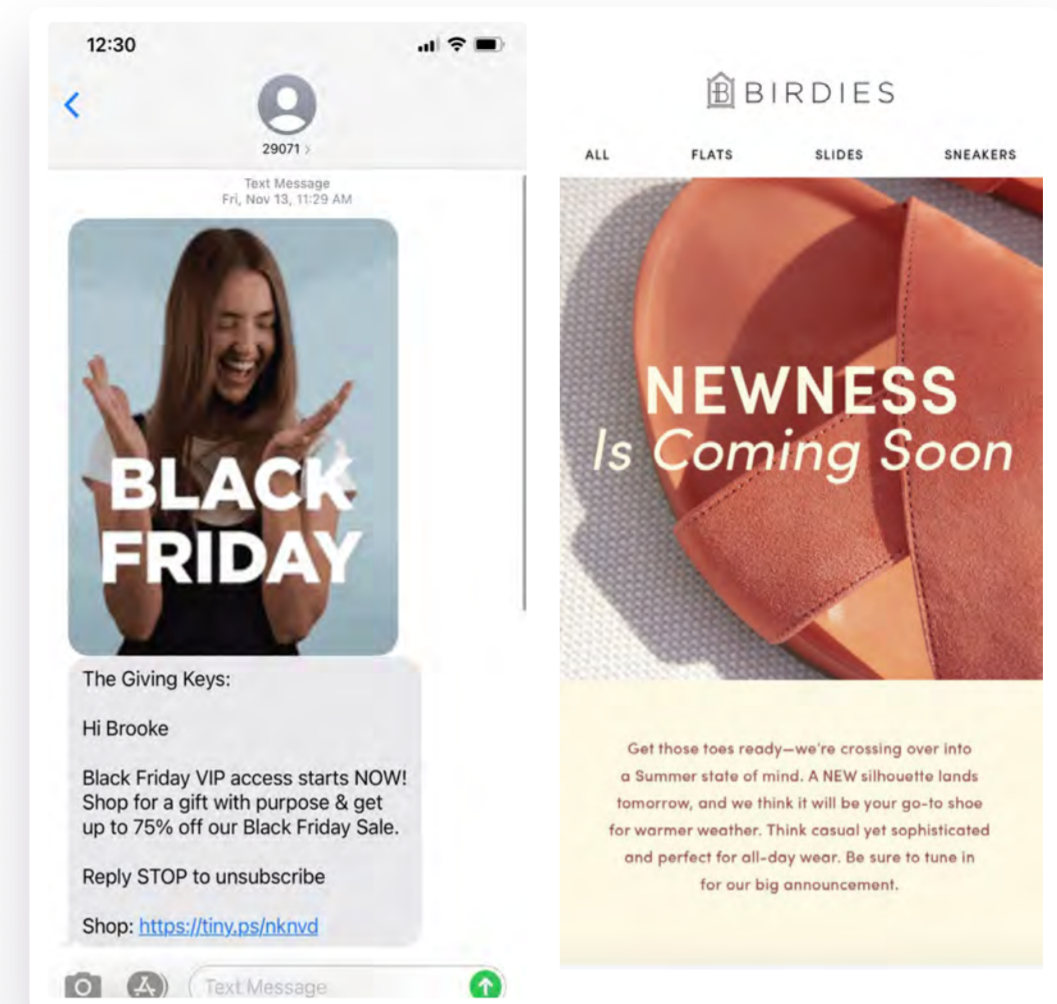
Identity traits like "Gender" or "Location"


6. Treat your big spenders like MVPs

Your big spenders are your MVPs and should be treated as such. Identify your big spenders and segment your contact list to offer these MVPs the very best. Here are a few tactics to shower your top spenders in the recognition they deserve:

- **Sneak peek:** If you're looking to release a new line or product, give your MVPs a sneak peek. Birdies offers a sneak peek of their summer release in this email example, building excitement for their new, go-to shoe.
- **Pre-sale:** Open up your sale items to your big spenders for 24 hours before it opens up to the rest of your customers. This pre-Black Friday sale SMS prioritizes frequent visitors and shoppers by giving them early access to deals not yet available to the public.
- **Thank you:** A simple [thank you](#) can go a long way. Say thanks to your most loyal customers for their support over the years. Offer them a discount to show your gratitude.

For more tips on how to create engaging email campaigns, check out our article, [Top Email Marketing Engagement Strategies](#).





CUSTOMER DATA YOU SHOULD TRACK:

- Behavioral events like "Order Completed" or "Promotion Clicked"
- Event properties like "Order Value" or "Product_ID"



7. Optimize the timing of your communications

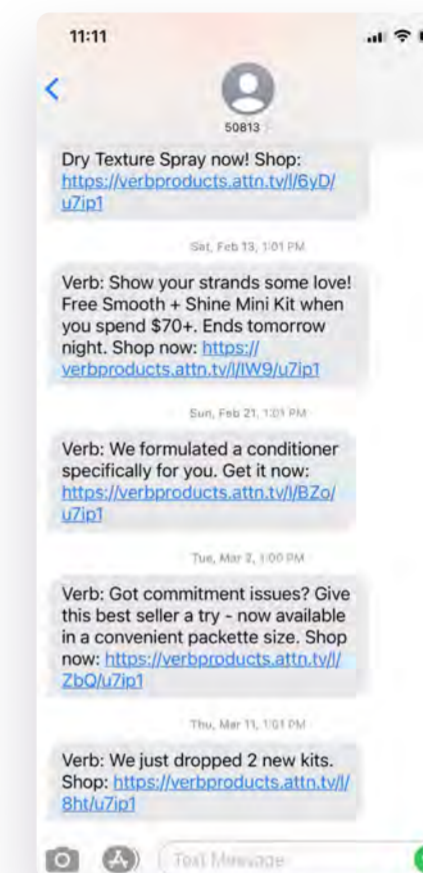
There isn't one magical time of day that makes someone say, "Yes! I want to purchase this!" (If you have found otherwise... please let us in on the secret.) We've found that time isn't the end all be all, but it does play a factor in how your customers engage with messaging. For example, an SMS or email sent at 10pm won't get nearly as much engagement as a message sent at 10am.

So when you're segmenting your contacts, pay attention to time zones. Twilio segments a lot of its communications by timezone to ensure that our contacts across the world are receiving messages at times relevant to them.

In the example below, each of the SMS messages was received at approximately 1:00pm MST, about a week apart from each other. The timing is consistent, and each send occurs in the middle of the day and at a time that translates well across all US time zones.

Location data can also lend itself to fun campaigns, targeting holidays unique to different countries (Boxing Day in the UK comes to mind), providing offers according to regional weather, or using the recipient's location to speak to upcoming events in the area.

For some suggestions on when to send (and when not to send) your campaigns, read our article, [The Best Time to Send Your Email Campaign](#).



CUSTOMER DATA YOU SHOULD TRACK:

Identity traits like "Location" or "Timezone"

Behavioral events like "SMS Opened" or "Email Opened"



8. Reach your customers on their preferred channel

Your audience isn't just made up of one persona. There are likely multiple personalities with varying tastes, dislikes, and preferences—you need to do your best to cater to all of them.

And, with so many different methods of communicating with your customers: [SMS](#), [email](#), [in-app](#) notifications, social media, and display ads, having a good understanding of how your customers want to receive their communications is essential.



CUSTOMER DATA YOU SHOULD TRACK:

[Referring domains](#) like Facebook, LinkedIn, or email

[Identity traits](#) like “SMS Opt-Out”



USING EMAIL AND SMS TO ENGAGE YOUR CUSTOMERS

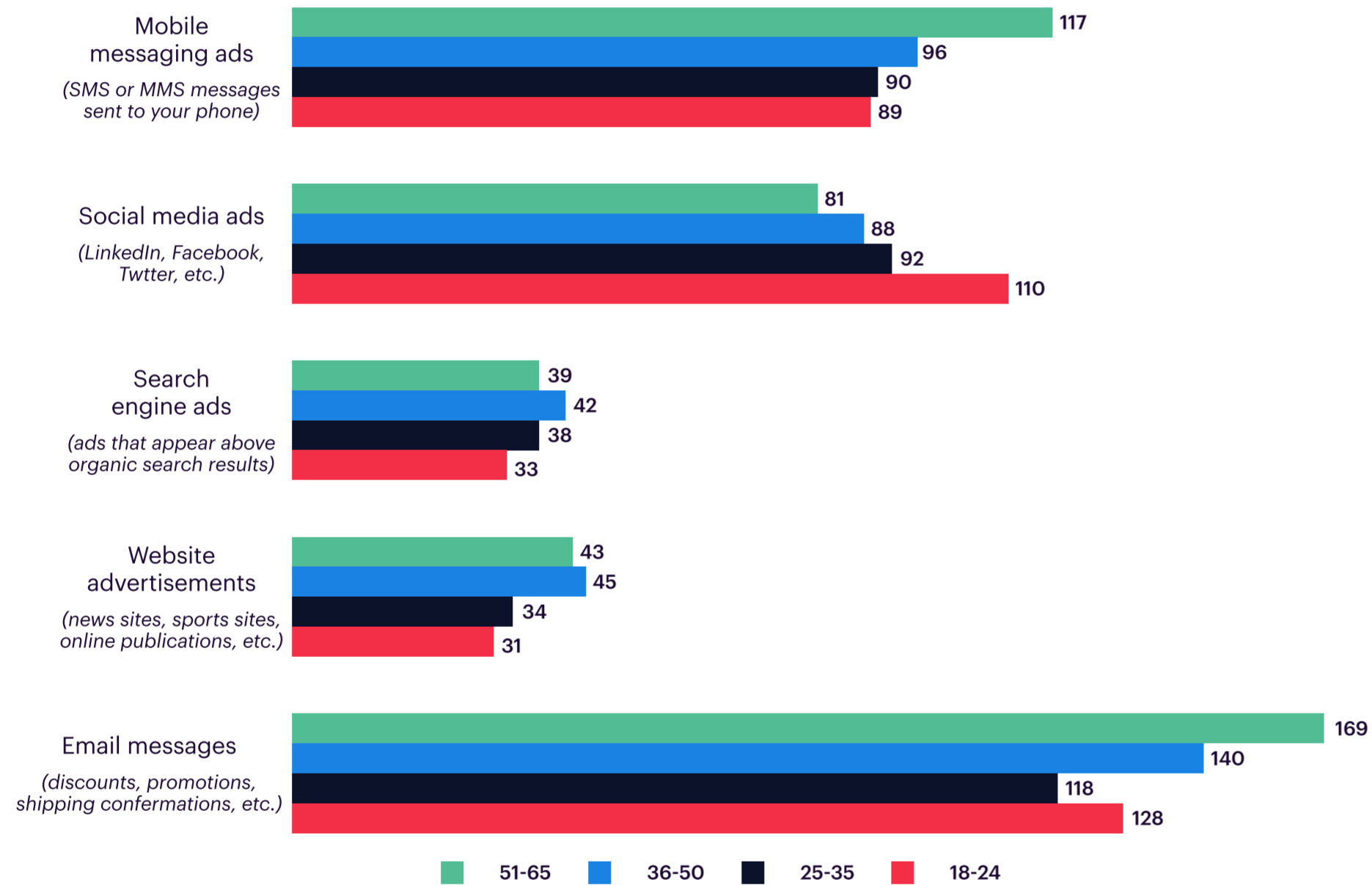
Email and SMS are two of the most popular customer engagement platforms—learn how to use them together in our guide: [Using SMS and Email to Engage Your Customers](#).

Use your customer data to determine your audience's favorite platforms and forms of content—prioritize from there.

Your business might not need a TikTok, Snapchat, Twitter, LinkedIn, Facebook, and Instagram account. You may find that most of your audience just prefers LinkedIn and Twitter. If that's the case, focus your time and energy there.

The most popular channels

Communication channel engagement - USA by Age



In our [2020 Messaging Engagement Report](#), we surveyed recipients in 6 key countries to better understand their messaging preferences. We discovered that email was the most popular channel across age brackets, followed by SMS.

If you're looking for direction on when to use what channels across different demographics, use this report as your guide.

[Your engagement roadmap](#)

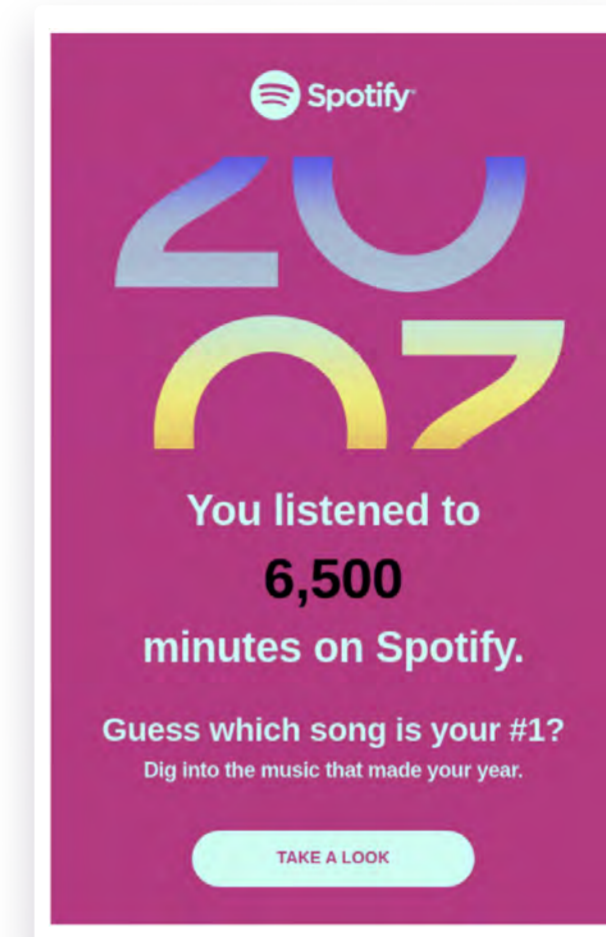
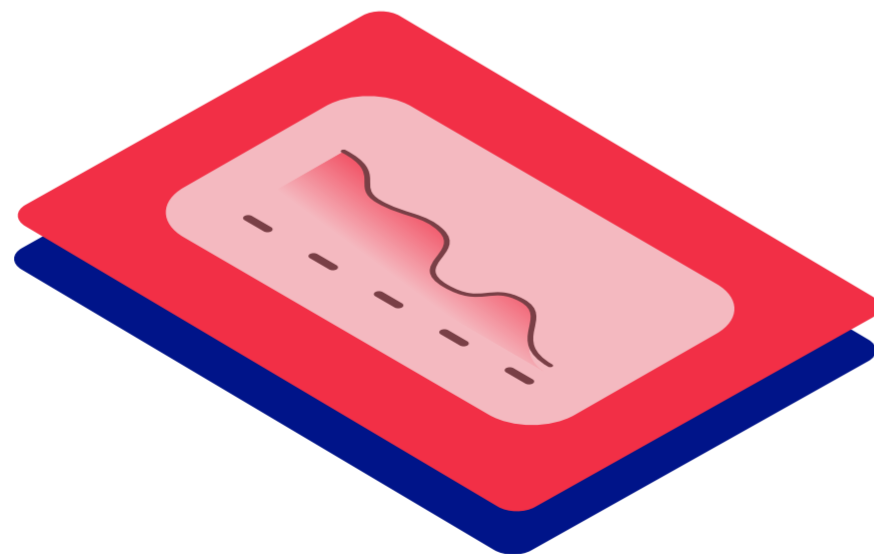
9. Experiment with special campaigns

Remember Spotify Wrapped, Strava End of Year Recap, and Snapchat's Year-End Stories? Of course, you do—they're some of the most [memorable, powerful marketing campaigns](#).

Experiment with your own one-off email campaigns. If you have the data, try sending your customers their own year-end recap emails. A campaign that highlights how you've used that product or service over the last year is a fun way to keep customers new and old engaged.

Perhaps, experiment with sending personalized text-only emails or test a new channel your customers are using.

Get creative with your data!



CUSTOMER DATA YOU SHOULD TRACK:

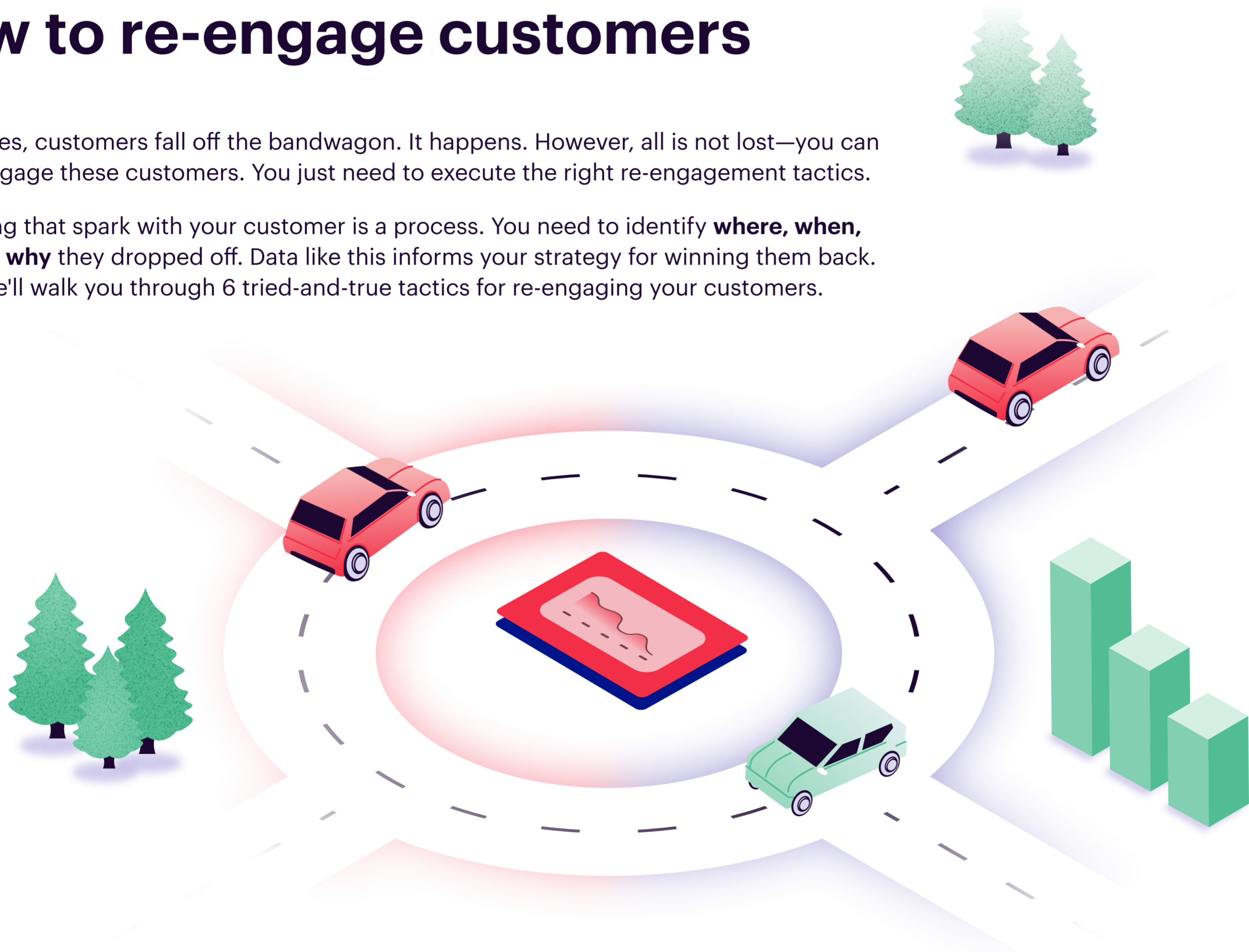
Behavioral events like "Song Played"

Event properties like "Genre" and "Artist Name"

How to re-engage customers

Sometimes, customers fall off the bandwagon. It happens. However, all is not lost—you can still re-engage these customers. You just need to execute the right re-engagement tactics.

Re-igniting that spark with your customer is a process. You need to identify **where**, **when**, **how**, and **why** they dropped off. Data like this informs your strategy for winning them back. Below, we'll walk you through 6 tried-and-true tactics for re-engaging your customers.





10. Put your customers in the communications driver's seat

Customers can fall out of love with a brand that talks at them rather than with them. Let your customers have a say in the conversation by deciding their communication preferences from the get-go with a [preference center](#).

Give your customers options. Let them check the boxes for the **when**, **what**, and **where** of your messages.

- **Channels:** SMS, email, voice, WhatsApp, Facebook Messenger, etc.
- **Content:** Newsletters, events, product announcements, sales, business news, etc.
- **Frequency:** Instantly, daily, weekly, monthly, quarterly, annually

Your customers may have stopped engaging with you because they're tired of email—not you. Or they may be interested in your [product announcement emails](#) and not your upcoming events.

Re-engage your customers by empowering them to tailor their communications.



CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like “Newsletter Unsubscribed” or “SMS Opt-Out”

Referring domains like Facebook ads, email, or pricing page



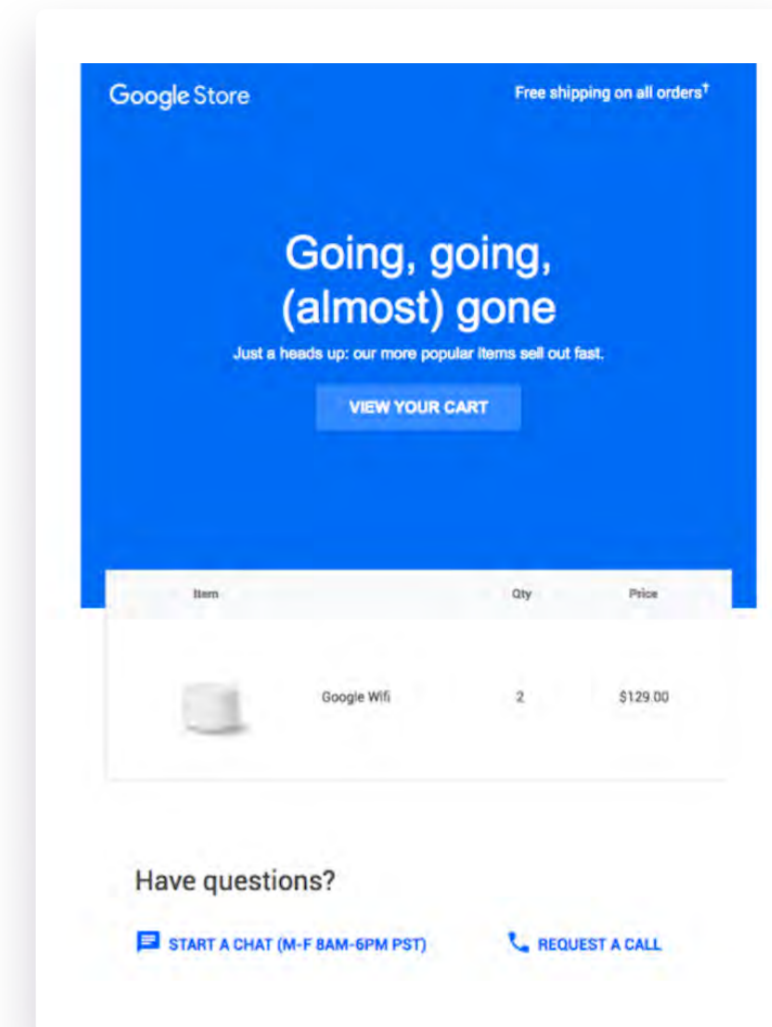
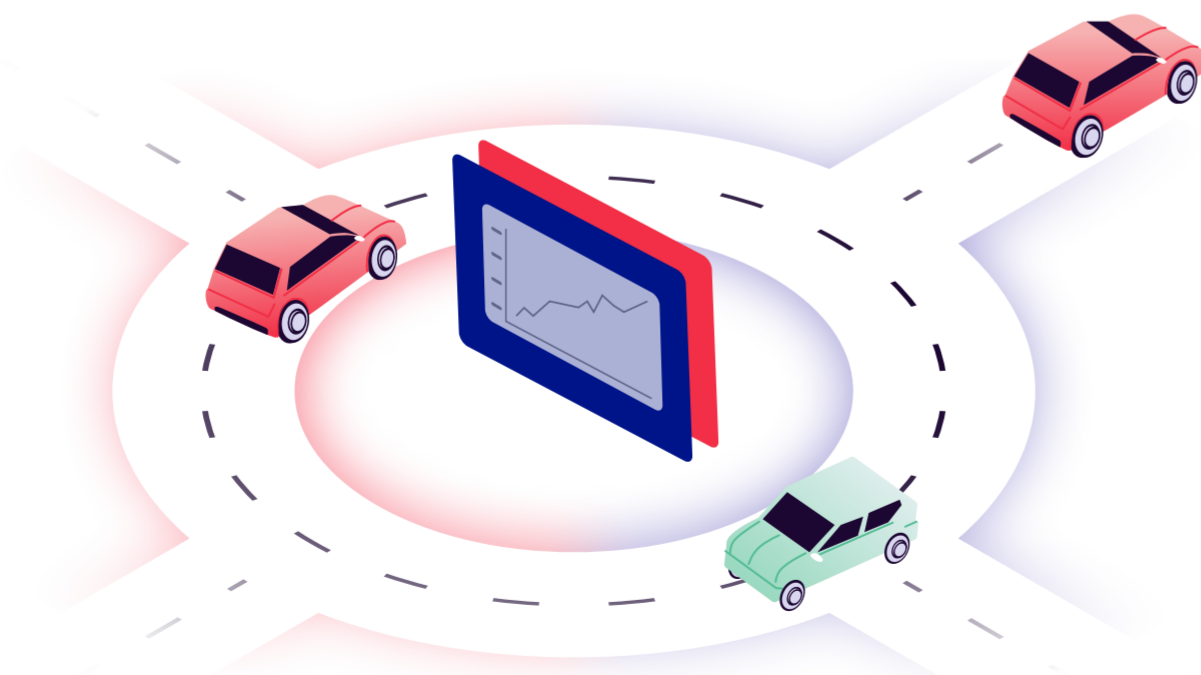
11. Master the art of sending abandoned cart emails

Customers abandon [over 77% of digital carts](#), meaning they showed interest to some extent before ditching their shopping bag in the digital aisles of your website. Fortunately, getting them to come back is easier than you'd think.

Abandoned cart emails boast a 43% open rate (in contrast to our previous data, [that's well above the benchmarks](#)) and a crazy-high 8% conversion rate. Can you think of any other marketing tactic with that high of a conversion rate?

However, there's an art to sending effective abandoned cart emails. You'll need to collect the right data to personalize your messaging and increase the chance of conversions.

That's easier said than done. Begin mastering the art with our [comprehensive guide](#) to getting started with abandoned cart emails.



CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like “Product Added” or “Cart Viewed”

Behavioral events like “Checkout Started” or “Checkout Step Viewed”



12. Leverage your call center data

Your support calls aren't one-and-done conversations—there's valuable data you can extract from these interactions. Your representatives can record details about the conversation to inform future engagements.

For example, if your customer called about a shoe-sizing issue, you may follow-up with targeted campaigns promoting true-to-size footwear.

In addition, you can ask any customer to fill out an NPS survey after a support call. This not only gives you valuable data on your support team's performance, but it also gives you an opportunity to identify promoters and detractors.

You can reach out to identified promoters and ask for a review on a site like G2 or Capterra (while offering a reward), and you can alleviate concerns with detractors by providing additional follow-up value: free training calls, 1:1 coaching session, samples package, and more.



CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like “NPS Score Submitted” or “Support Ticket Submitted”

Behavioral properties like “Call Duration”

13. Coordinate cross-channel campaigns

Have you ever tried a [pre-targeting campaign](#) before? Pre-targeting entails running ads to inactive users before you reach out to them via email.

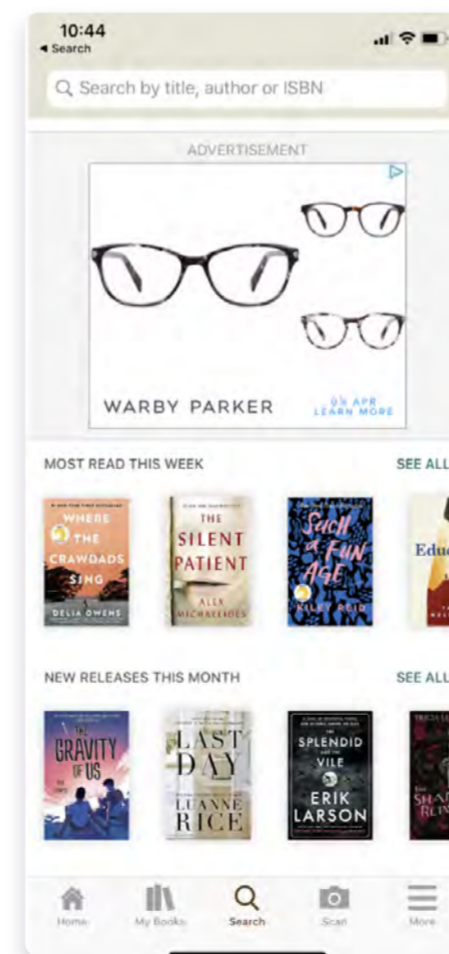
In practice, this is showing inactive users ads all across the web: Google search, LinkedIn, Facebook, and other websites. Pre-targeting campaigns gives you an opportunity to present value props and a larger-than-life brand impression before you hit them with the sales pitch or discount offer in their inbox.



CUSTOMER DATA YOU SHOULD TRACK:

[Referring domains](#) like Facebook ads, email, or pricing page

[Behavioral events](#) like “Promotion Viewed”



EMAIL AND DISPLAY ADS WORK TOGETHER

Social and display ads give email senders the ability to create, manage, and analyze ad campaigns based on their existing email contact list. Read the [Expert’s Guide to Social and Display Ads](#) to learn how to get started.

Value props could be advertising new product features, customer testimonials, or content marketing pieces. As you run these ads, you'll collect more data to inform which types of content perform best so you can scale with confidence.


This Warby Parker advertisement on the Goodreads app is an excellent example of warming up inactive users before sending them [email promotions](#).

14. Nudge your customers when you notice non-activity

Opens, views, clicks, visits—they're all important customer signals. However, equally important are the non-activity signals: non-opens, non-clicks, non-visits, bounces, etc.

When your data reveals non-activity, it's time for you to take action. Non-activity indicators could be a customer that hasn't visited your website in a while or hasn't been opening your emails. They may not be using your app, visiting your store, or continuing their subscription. They might have started signing up but left before finishing.

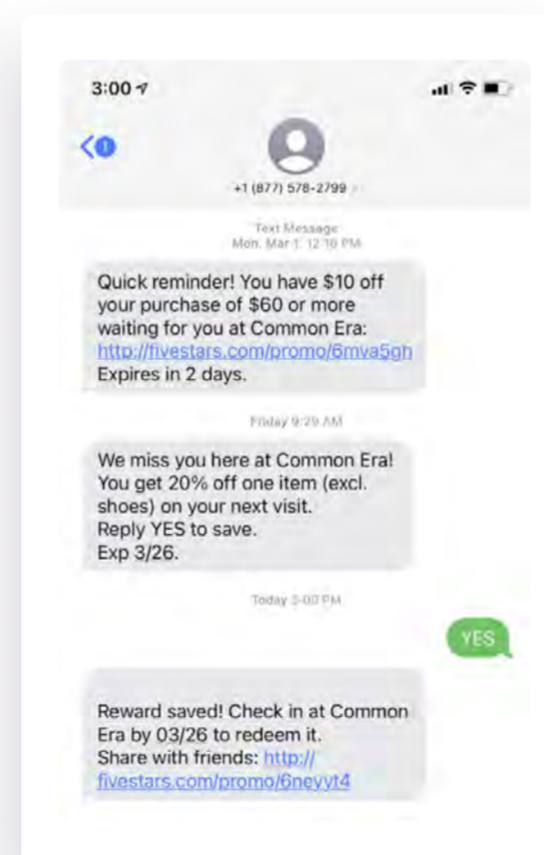
These are all important non-activity signals.



CUSTOMER DATA YOU SHOULD TRACK:

Referring domains like Facebook ads, email, or pricing page

Behavioral events like “Promotion Viewed”



Use that data to give your customers a gentle nudge:

- Send a follow-up email asking them to complete their signup—and offer to help if they have questions.
- Give your customers a free shipping coupon to finish checking out on your site.
- Try sending your customers to a preference center to let them opt into or out of certain messages.
- Retarget your customers on new channels with a cross-channel reactivation campaign.
- Offer a 20% discount via SMS to a customer who has not visited the store for a few weeks, as shown in the SMS example.



15. Sunset contacts when all else fails

Don't beat a dead horse—create and execute a [contact sunseting strategy](#).

Sunseting is when you segment your unengaged users from your engaged users. You don't want to keep sending emails and text messages to those who never open them—that hurts your deliverability, and it also costs money.

Instead, analyze your engagement data to see who's interacting with your emails. If you tried the 5 tactics above and can't re-engage customers who've fallen off the bandwagon, then it's time to start sunseting.



CUSTOMER DATA YOU SHOULD TRACK:

Behavioral events like “Login,” “Email Opened,” or “SMS Opened”

Contextual traits like “Time Spent On Page”



DIGITAL ENGAGEMENT IN 2020

In 2020, companies had to use more digital touchpoints than ever before to keep their customers engaged. Twilio's [2020 State of Customer Engagement Report](#) found that digital touchpoints with customers increased an average of 63% in 2020! Download the report for more insights you don't want to miss.

You don't need to delete these contacts from your database forever. No, instead, [segment](#) them to a list that you may be able to target again in the future.

For example, your product's price point may just be too high right now for some customers—but you may release a free version in the future. In that case, you could again attempt to re-engage this audience.



How to get started

With all of these methods of engaging customers at your disposal, the next step is to figure out how to collect the data and what tools to use to act out these strategies. Luckily, [Segment](#) makes collecting data a breeze, while [Twilio](#) and [SendGrid](#) provide customizable communication channels to reach your customers.

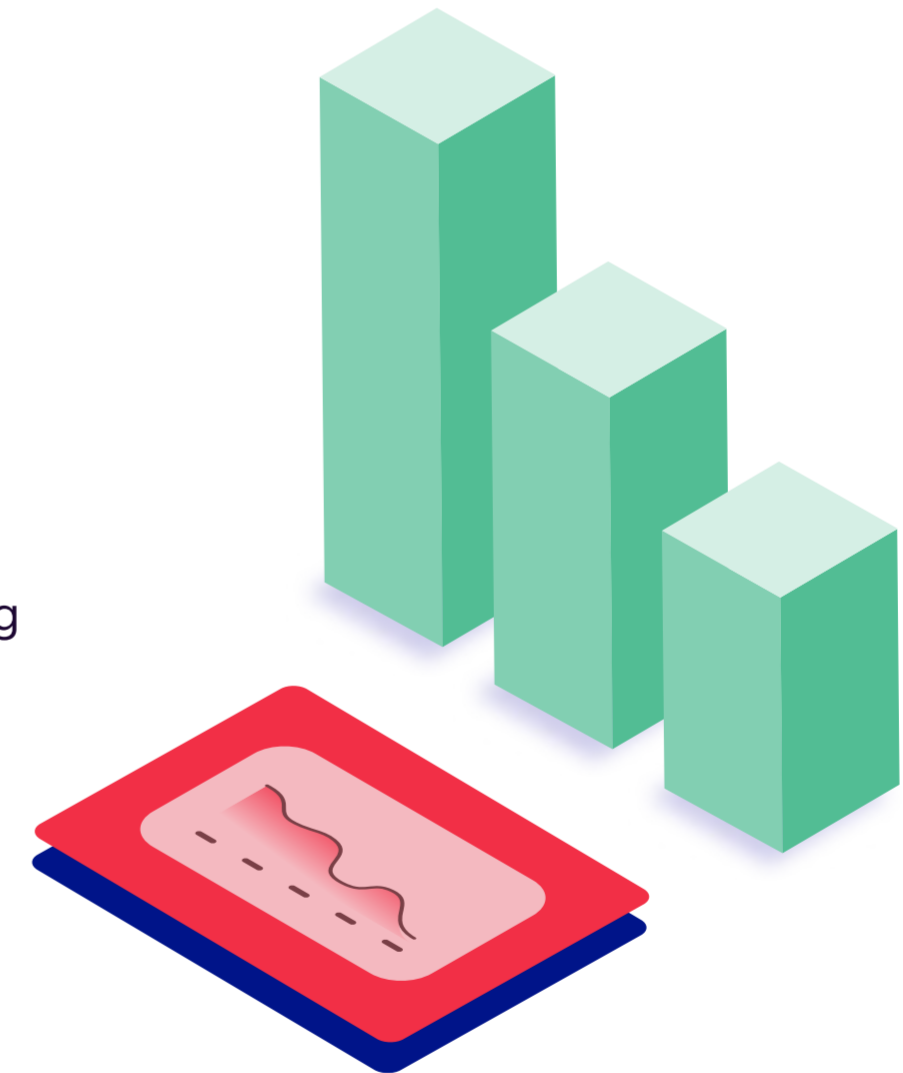
Event tracking basics

With Segment, you can use “event tracking” to understand your website visitor’s behavior.

What is an event?

Events are simply actions performed by your users on your website—whether that’s clicking on promotions, viewing products, completing an order, etc.

What you track is up to you, but here’s a list of the most common events tracked by e-commerce customers at Segment and the corresponding behavior it will help you understand.



Event Name	Description
Product Clicked	User clicked on a product
Product Viewed	User viewed a product details
Product Added	User added a product to their shopping cart
Product Removed	User removed a product from their shopping cart
Cart Viewed	User viewed their shopping cart
Checkout Started	User initiated the order process (a transaction is created)
Checkout Step Viewed	User viewed a checkout step
Checkout Step Completed	User completed a checkout step
Payment Info Entered	User added payment information
Order Completed	User completed the order
Order Updated	User updated the order
Order Refunded	User refunded the order
Order Cancelled	User cancelled the order



SET UP YOUR EVENT TRACKING APP IN 5 MINUTES

Ready to uplevel your event tracking? The Twilio Segment Quick Deploy app allows you to subscribe to SMS notifications for Segment events that you care about.

Our Quick Deploy apps can be built in 5 minutes or less. [Try it out for yourself!](#)

Additionally, you can use this data to solve two other pieces of the puzzle: who is taking the action and where they are when they do it. [Find out more](#) about how Segment can help you understand those questions too.



Start building a 360-degree view of your customers

Now that you've collected the customer data, what can you do with it?

While most companies find it relatively straightforward to collect and store large amounts of customer data, they often run into trouble making that data actionable.

This can be solved by ensuring your business has three systems in place:

1. **A customer data platform (CDP):** A CDP, like [Segment](#), not only collects valuable event data, it also ingests different sources of data from many different disconnected systems.

Site interactions, CRM data, survey data, call center data, and much more can all be added to a customer data platform so you can see all the activity of a user, from any channel, online or offline, in one place.

2. **An identity resolution system:** Once you've collected these disparate data sources, an identity resolution system will merge the data into a single customer profile. This helps you identify individuals as they move between devices, platforms, and channels.

3. **An audience management system:** Use an audience manager to categorize the different user profiles you've built.

Using a tool like [Segment Personas](#), you can organize your data into "audiences" that share certain characteristics. These characteristics range from broad (e.g., everyone who added an item to cart but didn't checkout) to highly specific (e.g. only those who interacted with a specific ad).

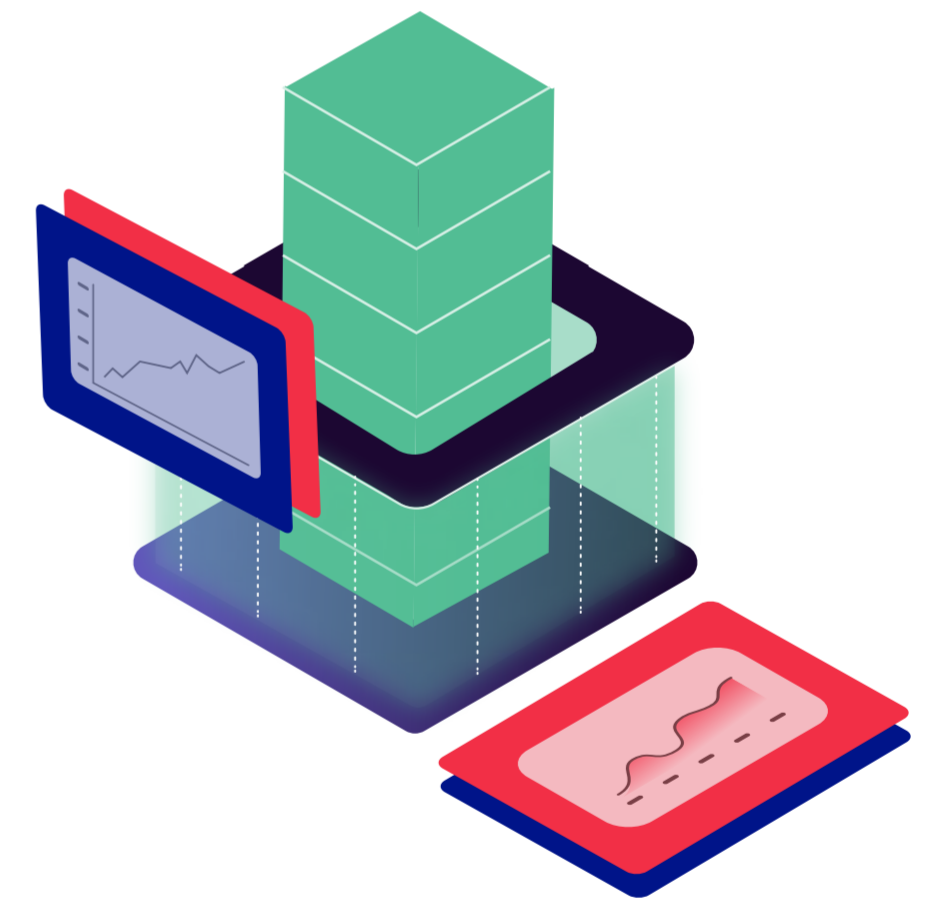
You can then send these audiences to customer engagement tools (like [Twilio](#) and [SendGrid](#)) to trigger engaging, personalized communication to your customers.



Put your data to action with Twilio and SendGrid

With data at your fingertips and an array of strategies in your back pocket, it's time to build out those campaigns and message your customers. Here are a few tips to help you get started:

- 1. Find an email service provider (ESP) that works for you.** Consider what you're looking for in an ESP—do you want email design and code editing capabilities? How about a provider that offers both marketing and transactional email?
[Learn more about what to look for](#) when you're shopping for an ESP and add [SendGrid](#) to your list!
- 2. Spend time on email design.** The design of the email can make or break your recipient's experience with your brand. To avoid any email design catastrophes, download a template from [SendGrid's free email template gallery](#). There are dozens of responsive, customizable templates to choose from.
- 3. Get started with SMS.** With a 98% open rate, SMS is a powerful tool that you should have in your communication arsenal. To get set up with SMS, [sign up for a free Twilio](#) account and explore our [Quick Deploy apps](#). These no-code apps allow you to send SMS communications in 5 minutes or less!
- 4. Pair email & SMS.** Email and SMS, while excellent channels on their own, are even stronger when paired together. Use SMS and email to grow your contact lists, cross-promote campaigns, and better understand customer preferences. Here are [a few strategies](#) to make the best of both worlds.





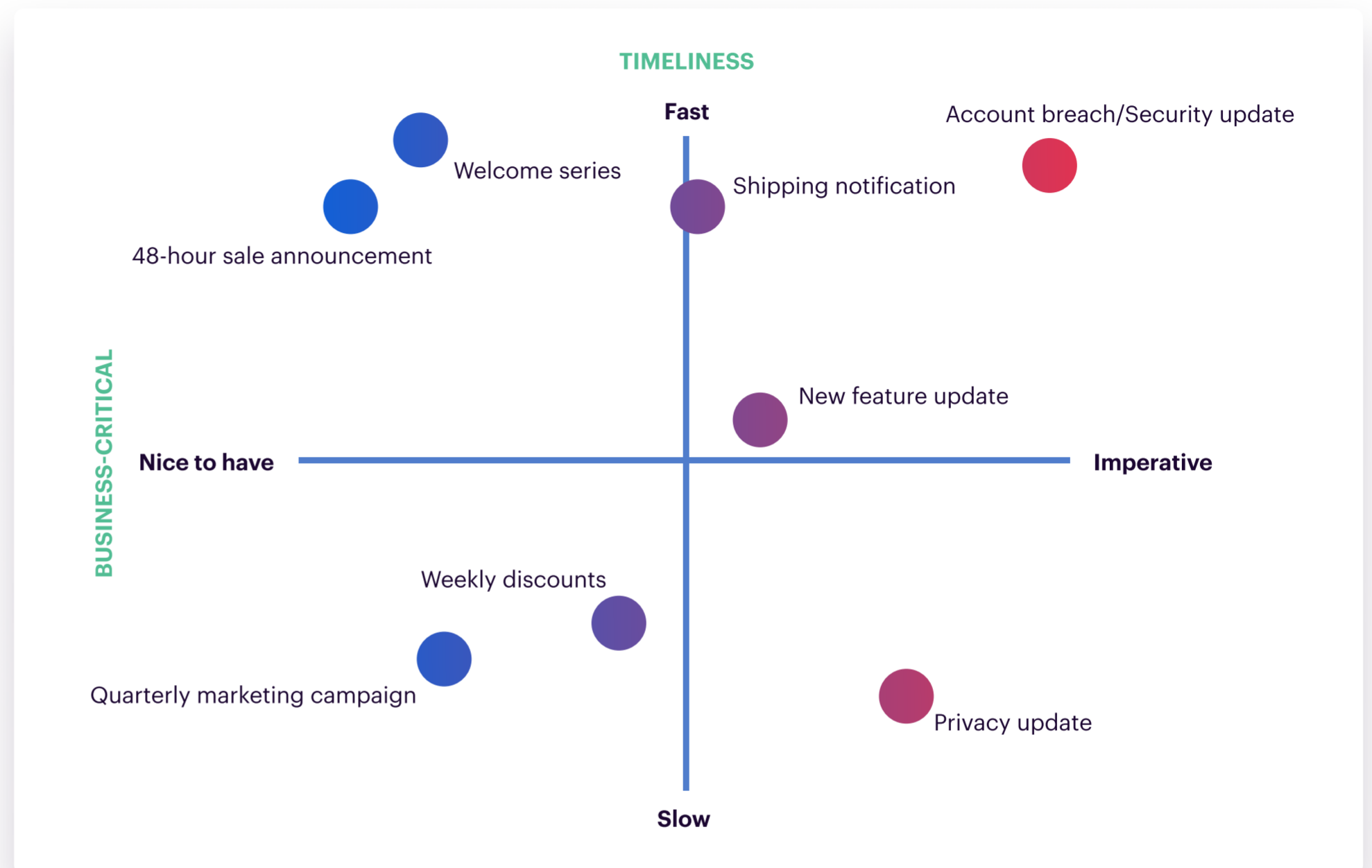
WHEN DO YOU USE EMAIL VS. SMS?

The best way to determine whether to send an email or an SMS is to answer the following questions:

- How quickly should the recipient receive the message?
- How business-critical is the content of the message?

SMS is typically for more urgent communications that require an immediate response, like package delivered notifications. Email, on the other hand, is archival, meaning that it's perfect for messages that you want to come back to like a receipt or a discount code.

Use the graph to map how you should get your message to your recipients.



For more tips on how to use SMS and email together, download our guide: [Using SMS and Email to Engage Your Customers.](#)



Perfecting your customer engagement strategy

Everyone wants more data. We want to see how our campaigns are performing and how customers are engaging with our latest product release. But it's one thing to have data and it's another to put it to action, so use the ideas in this guide to jumpstart your data-backed optimizations.

When in doubt, follow these 4 pillars to keep you grounded:

- 1. Go back to your business objectives.** Use your goals to guide where to focus your data initiatives.
- 2. Keep your customers and their experience in mind.** We can get so sucked into the data that we forget the purpose of data collection is to improve a customer's experience with our brand.
- 3. Embrace experimentation—trial and error are part of the process.** Knowing what isn't working is the first step to optimizing your messaging.
- 4. Provide individualized experiences.** When you focus on providing unique experiences for the individual rather than blanket communications to the masses, you create a meaningful relationship between your brand and your customer.

With a system like Segment in your toolbelt, you'll be well on your way to unifying customer data and perfecting your customer engagement strategy. You can then use platforms like Twilio and SendGrid to send your individualized customer communications.

Ready to get started? Sign up for a free [Segment](#), [SendGrid](#), or [Twilio](#) account today or [request a demo](#).