



Learn. Network. Grow.

MParDreamin' 2022

How the Right Message Can Increase Conversions

Jonathan van Driessen

CTO & Co-Founder, DESelect



DESelect's track record in **marketing data enablement**



accenture

Deloitte.

Capgemini

MERKLE.



“

DESelect has increased efficiency by 50%.

”



“

DESelect turned our whole team into data experts.

”



“

DESelect was the puzzle piece that was really missing within Salesforce Marketing Cloud.

”

How the Right Message Can Increase Conversions

- We'll dive into strategies and best practices that world-class marketing teams leverage to send the right message and increase conversion.
- We'll also reveal how to build a tech stack that will get the job done and how to optimize customer communications by controlling marketing saturation.



**What are YOU doing to
send the right message?**

Agenda

01. Why is Segmentation Critical?

02. Strategic Approaches

03. Best Practices in SFMC

04. World Class MOPS Tech Stack

05. Why Saturation Control Matters

On Deck

- 01.** Why is Segmentation Critical?
02. Strategic Approaches
03. Best Practices in SFMC
04. World Class MOPS Tech Stack
05. Why Saturation Control Matters

WHY YOU SHOULD CARE:

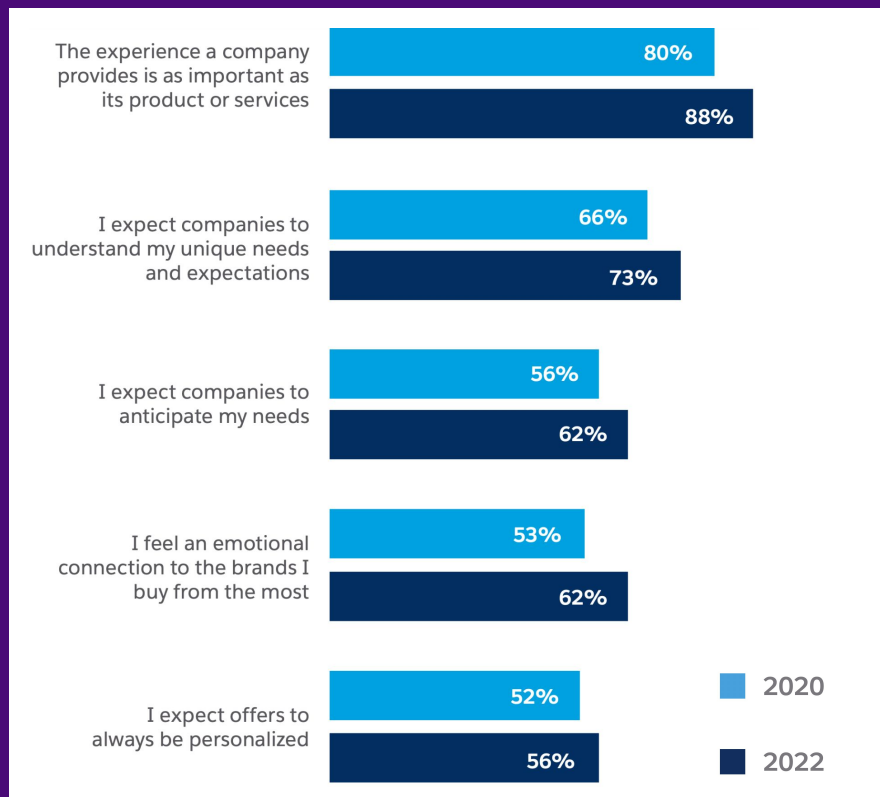
Segmentation is Critical

“

88% of customers say the experience a company provides is as important as its product or services.

... up from 80% in 2020.

”



Customer Segmentation Challenges



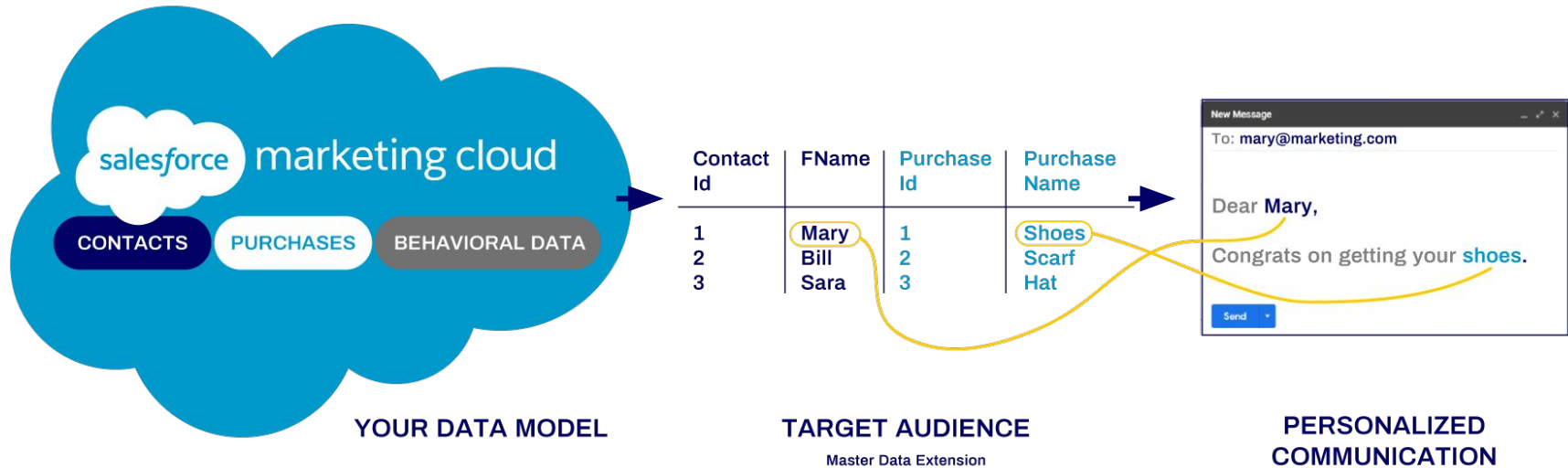
Targeting the right customers with the right message

Understanding whether the right data exists for a project

Quickly connecting and combining data from multiple sources



Data drives targeting & personalization



On Deck

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Different segmentation strategies

Strategy	How to implement:
Cross-sell campaigns	- Product A = TRUE, Product B = FALSE
Upsell	- Purchase date > X AND Complaints = 0
Churn avoidance	- LTV > \$X, Last Purchase > Y date
Behavioural	- Opens (L6M) > 20, Click % over X sends > Y%
Regional	- Location + Order History + Product X





“

Only 5% of U.S. consumers say that email offers are well timed with their needs.

”

How confident are you in your marketing team's ability to reach your customers with the right message at the right time?

On Deck

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Using filters in SFMC



Navigation: Email | Overview | Content | **Subscribers** | Interactions | Tracking | Admin | Search Term | Search | Feedback | Demo Anthony | Anthony Lamot

Data Filters > CNX22 - filter

External Key:

[Create Data Extension](#)

EXTERNAL KEY

Created
05 June 2022 08:47
by Anthony Lamot

Last Modified
05 June 2022 08:47
by Anthony Lamot

LOCATION

Data Filters [Change](#)

Preview [Edit](#)

TYPE	SOURCE
Data Extension	DESelect_DEMO_Customers

Country is equal to **United States, Belgium**

Birthday is equal to **05/06/2022**

Filter text

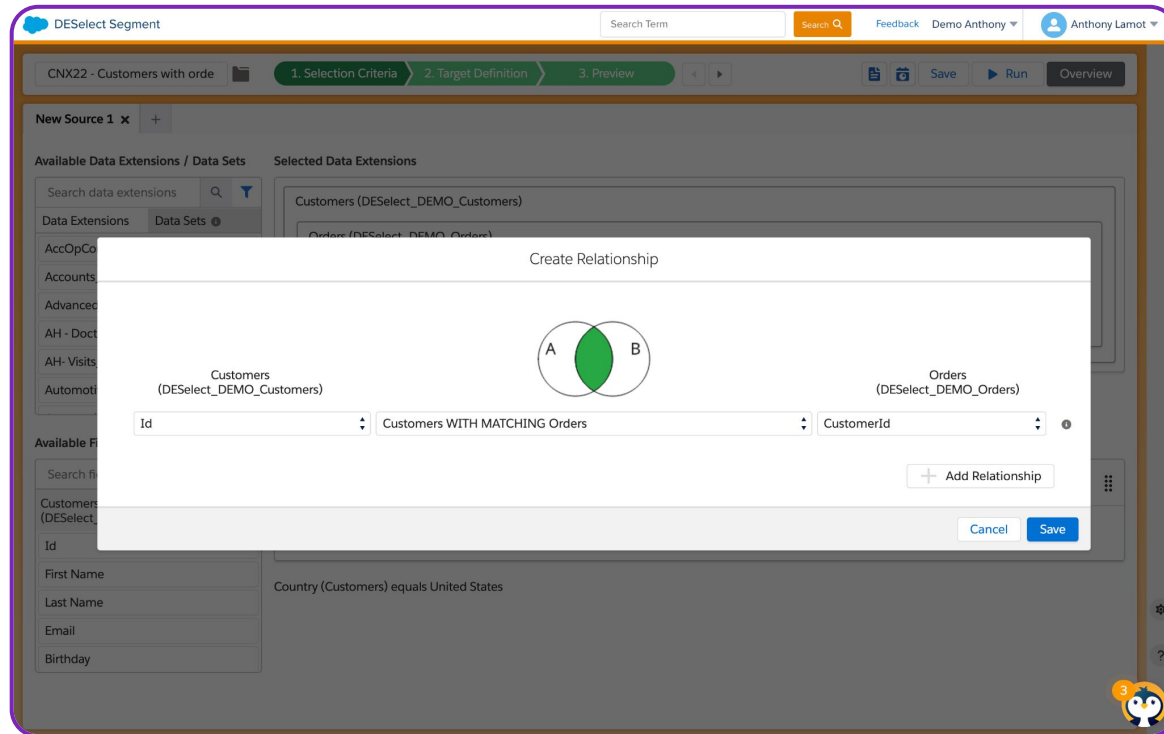
Country is equal to United States, Belgium **AND** Birthday is equal to 05/06/2022

What a SQL query might look like

The screenshot shows the 'Automation Studio' interface. At the top, there's a navigation bar with 'Automation Studio', 'Overview', and 'Activities' tabs. A search bar and user profile 'Anthony Lamot' are also visible. The main content area is titled 'CNX22 - Insurance customers deduplication'. Below this, there are two tabs: 'CONFIGURATION' (selected) and 'ACTION LOG'. The 'CONFIGURATION' tab shows 'Properties' and 'Target Data Extension'. The 'Properties' section lists: Name (CNX22 - Insurance customers deduplication), External Key (a46d5651-2f20-4482-a9e4-7f563b4ce0e1), Folder Location (Query), and Description. The 'Target Data Extension' section lists: Data Extension (Insurance Contracts) and Data Action (Overwrite). The 'SQL Query' section contains the following code:

```
1 SELECT "insurance contract id",
2       "date",
3       "household id",
4       "contact id",
5       "insurance sum",
6       "agent id",
7       "type"
8 FROM (SELECT "insurance contract id",
9           "date",
10          "household id",
11          "contact id",
12          "insurance sum",
13          "agent id",
14          "type",
15          Row_number()
16         OVER (
17          partition BY "contact id"
18          ORDER BY "contact id") AS row_num
```

How to combine data extensions



DESelect Segment

Search Term Search Feedback Demo Anthony Anthony Lamot

CNX22 - Customers with orde 1. Selection Criteria 2. Target Definition 3. Preview Save Run Overview

New Source 1 x +

Available Data Extensions / Data Sets Selected Data Extensions

Search data extensions Search data extensions

Data Extensions Data Sets

Customers (DESelect_DEMO_Customers) Orders (DESelect_DEMO_Orders)

Create Relationship

A B

Customers (DESelect_DEMO_Customers) Orders (DESelect_DEMO_Orders)

Id Customers WITH MATCHING Orders CustomerId

+ Add Relationship

Cancel Save

Country (Customers) equals United States

Id First Name Last Name Email Birthday

3

Calculate values



Filters

⊗ Sum of Total Amount on DESelect_DEMO_Orders is at least 1000

⊗ Country Customers Equals United States

⊗ Order Date Orders is In Previous 30 Days

AND

DRAG - AND - DROP AVAILABLE FIELDS HERE TO FILTER

Create target data extensions on the fly



The screenshot shows the DESelect Segment interface during the 'Target Definition' step. The breadcrumb trail is '1. Selection Criteria > 2. Target Definition > 3. Preview'. The current step is highlighted in green. The interface includes a search bar, a 'Feedback' button, and a user profile for 'Anthony Lamot'. Below the breadcrumb, there are buttons for 'Save', 'Run', and 'Overview'. The main area shows a dropdown menu for 'Select a Target Data Extension:' with the selected value 'CNX22 - High value customers with recent orders' and a 'Create Data Extension' button. A warning message states: 'Overwrite Data Action Selected. This action will overwrite all of the current data in the Target Data Extension. [Change Data Action](#)'. The 'Available Fields' section on the left lists fields from 'Customers (DESelect_DEMO_Customers)' and 'Custom Values'. The 'Field' section on the right shows a table mapping source fields to target data extension fields.

Field	Target Data Extension Field
Id (Customers)	Customer Id
First Name (Customers)	First Name
Last Name (Customers)	Last Name
Email (Customers)	Email
Birthday (Customers)	Birthday
Language (Customers)	Language
Country (Customers)	Country
Gender (Customers)	Gender
Id (Orders)	Order Id

Add more personalization through custom values



A screenshot of the DESelect Segment software interface. The main window is titled 'DESelect Segment' and shows a workflow with three steps: '1. Selection Criteria', '2. Target Definition', and '3. Preview'. The 'Target Definition' step is active. A 'Custom Value' dialog box is open in the foreground, titled 'Which value do you want to add?'. The dialog has a 'Field Type' dropdown set to 'Text'. Under 'Value:', there are two rows. The first row has a 'When' condition 'Gender (Customers) equals Male' and a 'Then' field containing 'Dear Mr.' with a 'Null' checkbox. The second row has a 'When' condition 'Gender (Customers) equals Female' and a 'Then' field containing 'Dear Ms.' with a 'Null' checkbox. At the bottom of the dialog are 'Add Criteria', 'Back', 'Cancel', and 'Save' buttons. The background interface shows a list of available fields on the left, including 'Orders (DESelect_DEMO_Orders)', 'Zip Code', 'OrderLine_Items (DESelect_DEMO_OrderLine_Items)', 'Id', and 'OrderId'. A 'Custom Values' section is also visible, with a search bar and an 'Add new value' button. The 'Salutation' field is highlighted in the background.

Preview and iterate



DESelect Segment

Search Term Search

Feedback Demo Anthony Anthony Lamot

CNX22 - Customers with orde

1. Selection Criteria 2. Target Definition 3. Preview

Save Run Overview

Run Preview

▲ The records in this preview are the records that will overwrite the records in the Target Data Extension.

Preview last ran at 05/06/2022 10:11

[View SQL query](#)

Let's start Created Processed Completed

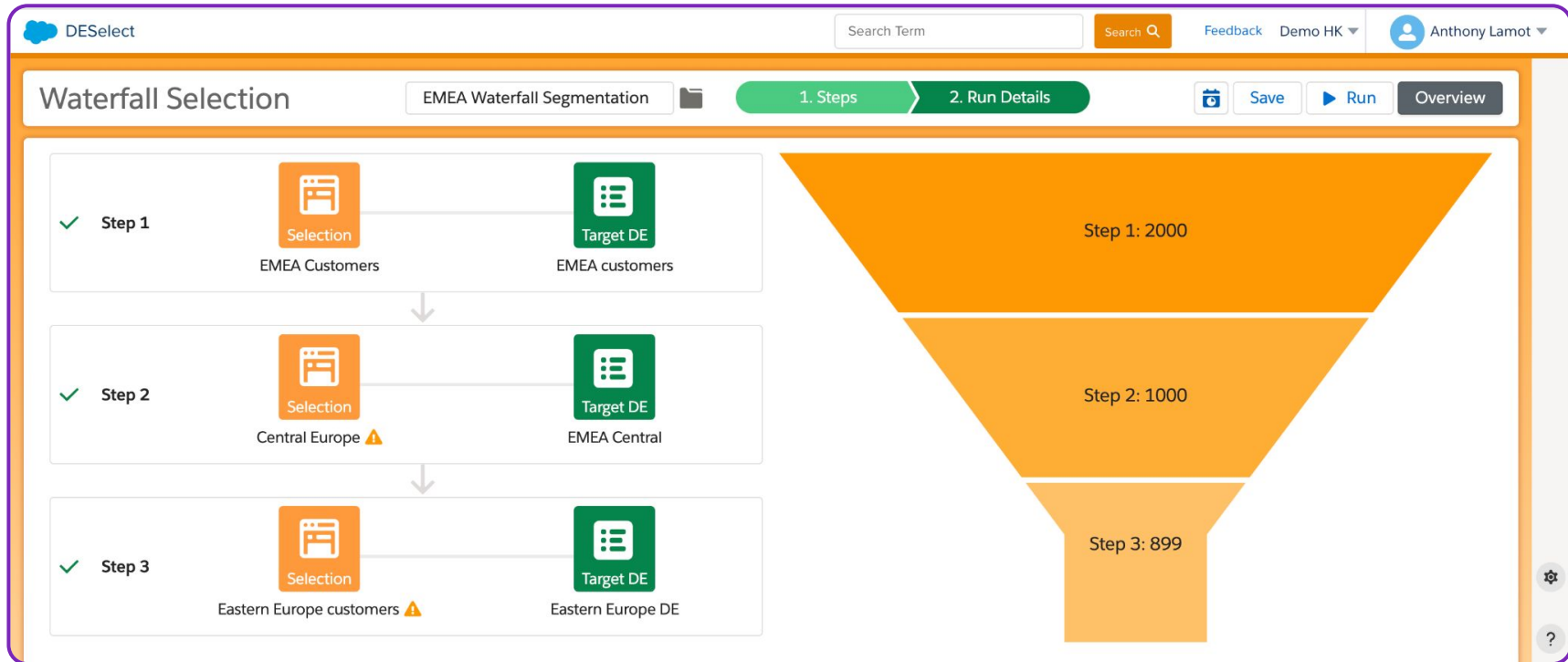
Currently showing 5 records of 5 records in total

Customer Id	First Name	Last Name	Email	Birthday	Language	Country	Gender	Order Id	Order Date	CustomerId	Total Amount
C-174	Dorothy	Williams	Dorothy.Williams@gmail.com	27/05/1961 00:00	en-us	United States	X	O-103	01/03/2019 00:00	C-174	9,006.00
C-15	Simone	Wells	Simone.Wells@yahoo.com	12/01/1945 00:00	en-us	United States	F	O-46	17/10/2019 00:00	C-15	23,365.00
C-104	Mary	Anderson	Mary.Anderson@hotmail.com	17/08/1958 00:00	en-us	United States	F	O-67	12/09/2019 00:00	C-104	10,149.00
C-135	Pricilla	Robertson	Pricilla.Robertson@yahoo.com	18/04/1948 00:00	en-us	United States	F	O-79	22/05/2019 00:00	C-135	24,794.50
C-3	Raymond	Lynn	Raymond.Lynn@yahoo.com	01/11/1952 00:00	en-us	United States	X	O-84	23/11/2019 00:00	C-3	2,190.00

Settings ?

3

Set up waterfall segmentation



DESelect

Search Term Search

Feedback Demo HK Anthony Lamot

Waterfall Selection

EMEA Waterfall Segmentation

1. Steps 2. Run Details

Save Run Overview

✓ Step 1

Selection Target DE

EMEA Customers EMEA customers

✓ Step 2

Selection Target DE

Central Europe ⚠ EMEA Central

✓ Step 3

Selection Target DE

Eastern Europe customers ⚠ Eastern Europe DE

Step 1: 2000

Step 2: 1000

Step 3: 899

World class segmentation + your business

General business drivers:

- Drive revenue
- Drive efficiency
- Reduce risk

Bonus:

- Time-to-value



***"I think we can segment 50% more
efficiently than we used to."***

- Kenni Dalby, VP Marketing

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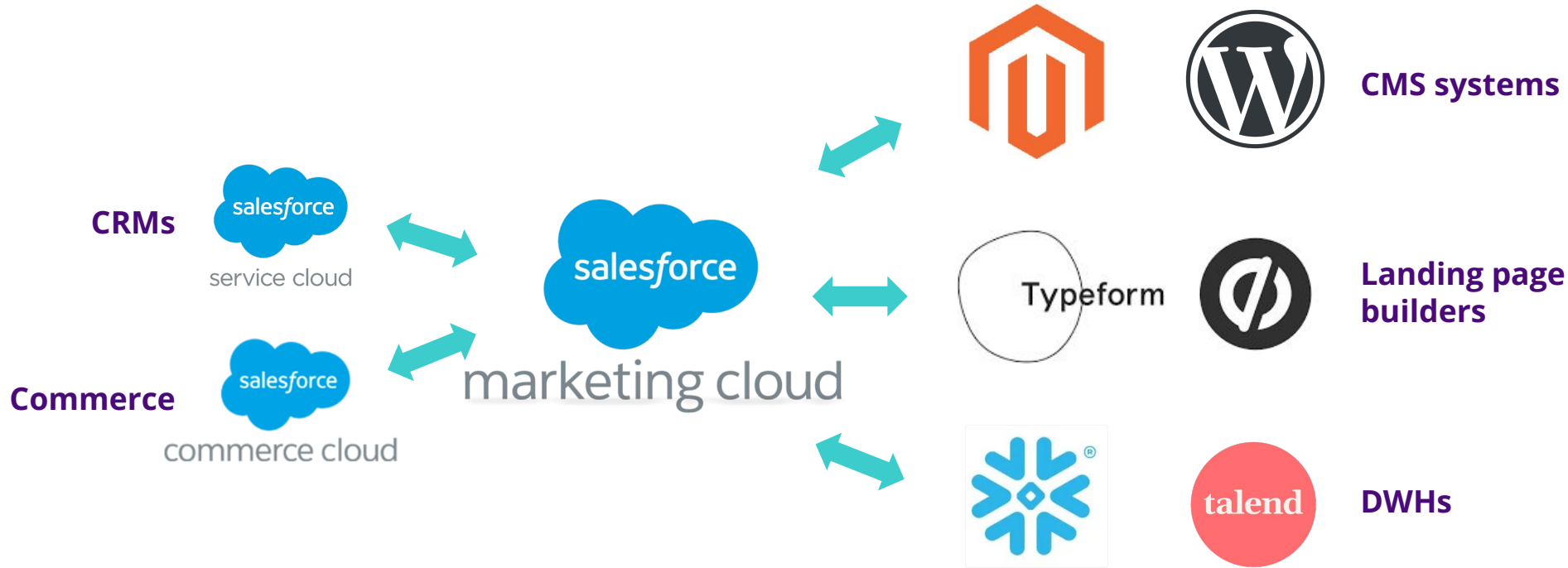
05. Why Saturation Control Matters

The MOPS Stack to Segmentation



	CDPs	DWHs	Marketing Data Enablement
Price	\$\$-\$\$\$	\$\$-\$\$\$	\$-\$\$
Typical user	Sys Admins + "Data-aware" Specialists + + Marketers	Data Engineers	Marketing Ops, enabling Marketers
Time-to-value	3-12 months	3-12 months	Instantly
Data	"Cross-cloud"	Any data	MAP data
Type of solution	Customer data platform	Data warehouse	Flexible point solutions
Use cases	Unification, "master segmentation"	Serve data sets to Marketing	Day-to-day segmentation

The MOPS data stack



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Why saturation control matters



1

Avoid Undersaturation

Not reaching your subscribers means leaving money on the table.

2

Avoid Oversaturation

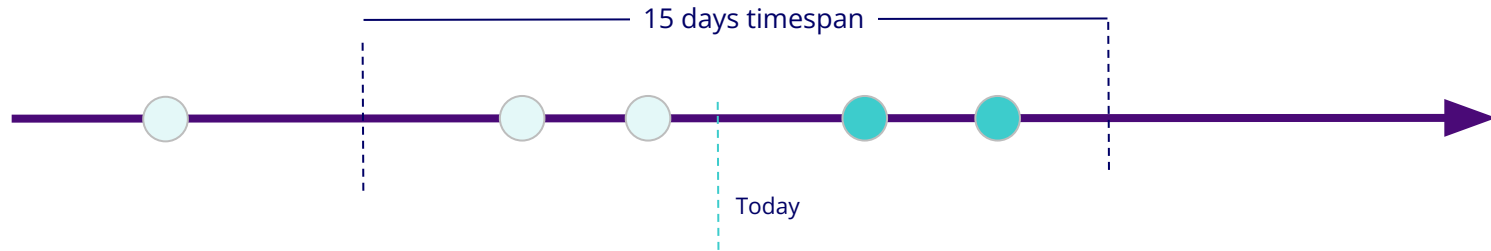
Sending people too many communications will lead to marketing fatigue and unsubscribes.

Why saturation control matters



Saturation control refers to **limit the number of communications sent to a certain user** in a period of time.

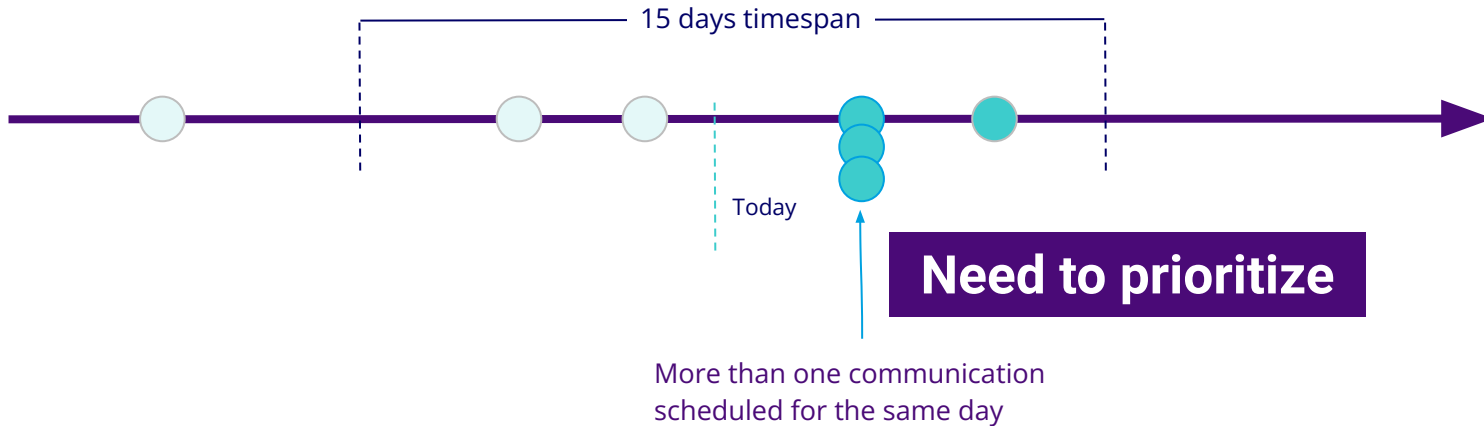
Let's say we want to limit the number of emails send to customers to **3 each 15 days**.



Saturation control challenges



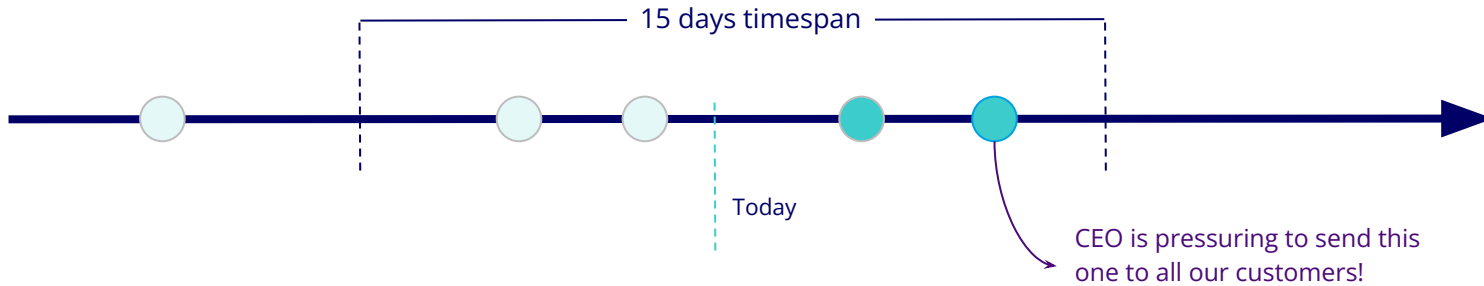
1: Multiple communications on the same day



Saturation control challenges



2: Important communications further into the future



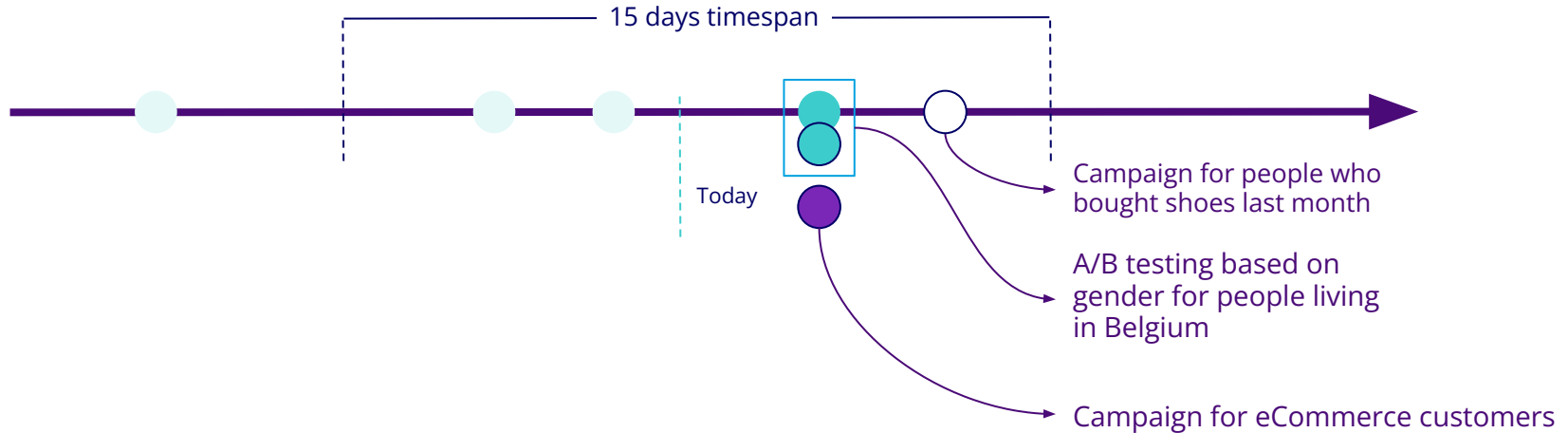
Need to prioritize

Saturation control challenges



3: Who is in which campaign?

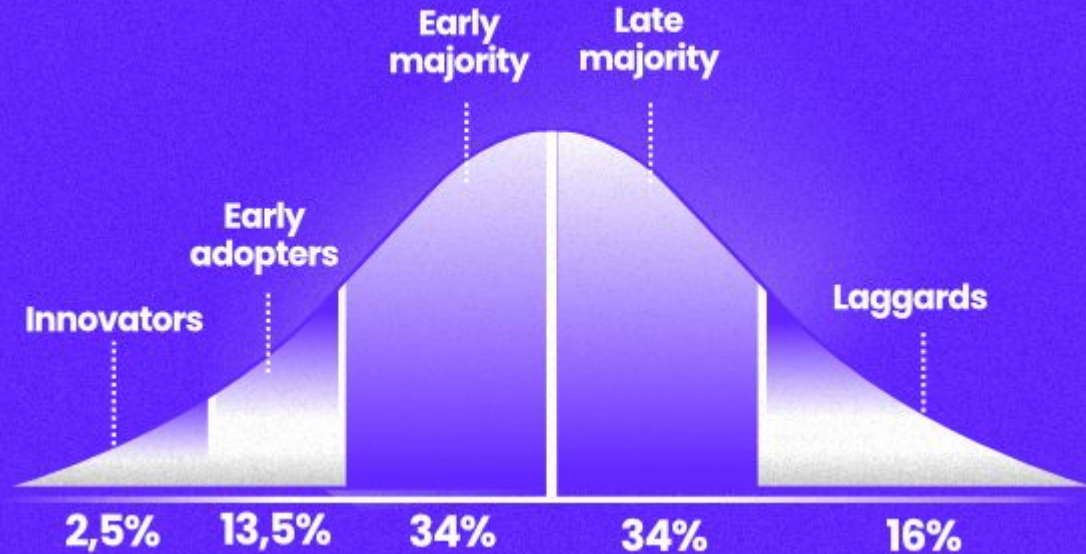
If we have multiple segments and multiple channels, it is hard to keep track of where the users are and therefore, to calculate the available slots for each of them. **We manage campaigns, not users.**



Saturation control: *We are early*

Driven by marketing automation, marketing maturity, increased customer expectations and multi-channel.

New concept and new technology → early adopters phase





DESelect's Solution: Engage

DESelect Engage – saturation + prioritization tool



Customizable saturation control solution based on rules

Define as many rules for different types of contacts and campaigns as needed, we'll calculate saturation based on all relevant rules.



Prioritization solution based on campaigns

We calculate who's in which campaign and based on defined priorities make sure contacts receive the most important campaigns.



Omnichannel support

Support different saturation controls for different channels or same saturation for all channels - no limit



Plug & Play

Available from day one, no need to wait for data

1

Create general rules for each contact category, based on channel or campaign type.

A screenshot of the DESelect Engage Admin Panel. The interface is titled 'Admin Panel' and includes a search bar at the top. On the left, there is a navigation menu with options: 'Back to Overview', 'Administration', 'Campaign Types', 'Contact Categories', and 'Rules'. The 'Rules' section is currently active. The main content area is titled 'New Rule' and contains a 'Define a rule' section. This section includes a text input field for the rule name, currently containing 'Marketing email rule'. Below this, there are two radio button options: 'Apply rule to all contacts' (which is unselected) and 'Apply rule to selected contact categories' (which is selected). Underneath, there is a 'Select contact categories' section with a dropdown menu showing 'Active Contacts' and a tag 'Active Contacts' with a close button. At the bottom of the form, there is a 'Rule Criteria' section with a numeric input field set to '2', a dropdown menu for 'Marketing', another dropdown menu for 'Email', the word 'per', a numeric input field set to '15', and a dropdown menu for 'Days'. To the right of the form, there is an 'Apply Rule' toggle switch currently set to 'Disabled'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons. The user's name 'Swati Mathur' is visible in the top right corner of the interface.

You can also set default rules as hard limits for every customer, to ensure you fulfill legal obligations

2

[Optional] Plan and prioritize campaigns to reserve slots.



DESelect Engage

Search Term Search Q Feedback DESelect Dev Swati Mathur

Calendar View List View Dashboard Exclude Campaign Create Campaign

◀ May 2022 ▶

● Saturated Contacts are below 20% ● Saturated Contacts are between 20% and 50% ● Saturated Contacts are above 50%

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 18	1 +	2 +	3 +	4 +	5 +	6 +	7 +
Week 19	8 +	9 +	10 +	11 + Campaign 1	12 + Campaign 2 Campaign 3	13 +	14 +
Week 20	15 + Campaign 4	16 +	17 + Campaign 5	18 +	19 +	20 +	21 + Campaign 6
Week 21	22 +	23 +	24 +	25 +	26 +	27 + Campaign 7	28 +
Week 22	29 +	30 +	31 +	1 +	2 + Campaign 8	3 +	4 +

3

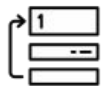
Use the DESelect Engage decision split in Journey Builder for real-time saturation control decisions, taking into account defined rules and priorities.



The screenshot displays the Journey Builder interface for a "Summer Sale Offers" journey. A configuration window for "DESelect Engage Saturation Control" is open on the left, showing a dropdown menu for "Campaign for summer sale offers" and two unchecked preference options: "Skip saturation now" and "Exclude from future". A note at the bottom of the window explains that unsaturated subscribers will receive sends based on set rules, while saturated subscribers will not receive any sends.

The flow diagram on the right illustrates the journey logic: it starts with a "Data Extension" event, leading to a "DESelect Engage" decision split. The "Unsaturated" path leads to an "Einstein STO" event, followed by an "Email" event, and finally an "Exit" event. The "Saturated (no sends)" path leads directly to an "Exit" event.

Benefits



Support future impact prioritization

Other solutions offer a saturation solution that will prioritize based on First On First Out. DESelect will allow you to set your own priority rules.



Custom rules support

You have the power to test different combinations and see the different results you get. No black-box, no “standard” rules, you 100% in control.



Unlimited channel support

You can use this solution for the channels integrated in SFMC, but also for any other channel.



Fully managed SaaS solution

Fully hosted and maintained by DESelect - including continuous development of improvements, new features and bug fixes, hosted on a secure platform, customer support.

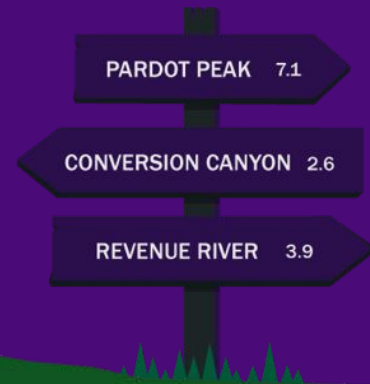


Fully integrated front end

You don't have to go anywhere else: the solution is fully integrated with SFMC and it will feel like another Studio.



Questions?



Free DESelect Certification

Email hello@deselect.com for a free voucher to our certification course and exam

Product Tour

Check out DESelect's **interactive product tour** to get a self-guided demo of Segment:

<https://deselect.com/tour/>