Driving Personalization & Customization with Variables

Sailthru offers two types of variables, user-level variables and purchase-level variables. These make the platform feel that much closer to something home-brewed. Variables ("vars") allow you to push in custom data from your business with ease and empower you to make your personalization and analysis that much richer.

User-level Variables

What is true of Customer A that is not true of Customer B?

Any data you collect on your subscribers can be saved as variables on their user profiles, regardless of what part of the business ecosystem the data might come from. For instance, a variable could be anything from the acquisition source of the user to a flag that indicates the customer engaged in a live chat on your site on a particular day.

You can write variables to user profiles either via API calls or through a simple CSV upload, and we encourage you to regularly push in any new data you collect. In addition to pushing in variables, you can use Sailthru's Query Builder to write new variables to user profiles based on customer attributes (for instance, you could run a query to identify your "VIP" segment and write a VIP variable to those users' profiles).

The breadth and depth of variables varies by client, but these are some of the more common user variables we see in play:

Acquisition Source

One of the most powerful and important variables for analytics and reporting is acquisition source: did the user come in from Facebook? A Google keyword? Direct to site? This level of granularity allows you to look at engagement at a deeper level and to optimize your marketing mix based on the longer term performance and engagement of different user segments.

We recommend passing acquisition source in the UTM parameter format:

- utm_source
- utm_medium
- utm_name
- [show URL string graphic with UTM parameters]

Signup Source

It is imperative to understand the difference between signup source and acquisition source. Signup source differs from acquisition source in that it is focused on how the user signed up, not where the user came from. For instance, did the user signup via a pop-up or did they use the signup form in the right rail? Signup source lets you see how various signup flows contribute to your overall list growth.

Demographic Vars

Clients regularly leverage vars to store various demographic data points they might have on end customers (either collected during signup or at other points in the customer lifecycle), ranging from gender to date of birth to household income range. Hyper-local clients will often even pass in the lat/long of their users. When deciding the types of demographic data you wish to collect and store, be sure to do the "actionability" litmus test. This means will you be able to use this data to drive greater relevancy to the end user?

Situational Vars

Your users have many touch points with your brand beyond just email and browsing your site, and we encourage you to log those experiences from elsewhere in the business ecosystem as vars. Has the user called in to your customer service center? Does she write product reviews after purchasing? These situational vars are some of the most powerful variables for multidimensional analytics, allowing you to answer questions such as "what is the incremental one-year revenue of a customer who has engaged in live chat versus a user who has not?"

Test Group Vars

Vars are also instrumental to helping you understand the long-term impact of your optimization decisions. Clients regularly write vars to user profiles to identify different test groups (e.g. received welcome stream A vs. received welcome stream B) and conduct longitudinal analysis on those groups over time.

Purchase-level Variables

(As a reminder, you should reference Sailthru's Purchase API documentation for precise instructions regarding how to pass data to Sailthru in a usable format.)

Purchase variables are descriptors of transactions that can help you break down your revenue performance into more digestible trends. Like customer vars, purchase vars can be as custom as you desire, but these are some of the more popular use cases:

Discount Type/Offer Labels

Tracking discount type as a purchase var lets you better understand both the short-term and longer term impact of various promotions so that you can answer questions like these within seconds:

- Does a free shipping offer drive stronger conversion than a 10% discount?
- How does one coupon code perform against another?
- What is the one-year CLV of customers who converted with a holiday promo vs. paid full price?
- Which offline stores produce the highest average order values?
- How do purchases vary by device and day of week?
- What portion of your revenue is attributable to your affiliate program?

Channel

The purchase channel variable is a standardized variable in the Sailthru system, meaning it must follow a prescribed syntax. This var provides insights on where the purchase is coming from and must be one of three values: app, online or offline. If you do not pass a value, the default value "online" will be passed. This attribution allows you to understand how purchase trends vary by platform as well as how online performance differs from offline. Be sure to speak with your account manager before implementing the channel field, as there are several additional optional fields you can also consider with this var.

Price Adjustments

If you are using Sailthru Advanced Analytics, you have much flexibility around custom revenue definitions. That said, for these custom definitions to work properly, you will need to be sure to use the following nomenclature for any fields that might be pertinent to your business (you can omit fields that do not apply):

- tax - Taxes applied to order
- shipping - Any shipping and/or handling fees applied to order
- discount - Discount off order from promotion code, coupon, etc.
- gift_card - Amount of order covered by gift card payment
- gift_wrap - Additional fee for gift wrapping.
- credits - Amount of order covered by account credit
- tip - Any gratuity added to purchase
- other - Up to client

Offline/Store Parameters

Brick-and-click clients will use purchase variables to pass Sailthru information about particular stores, not just to tell us which store was responsible for the purchase, but also to pass in additional information such as whether the store is a flagship, etc.