Empower your Marketing through Data Sharing with Twilio Segment

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Today’s Presenters

Ananth Packkildurai
Principal Engineer
Mural

Greg Yeutter
Principal Solutions Engineer
Twilio Segment

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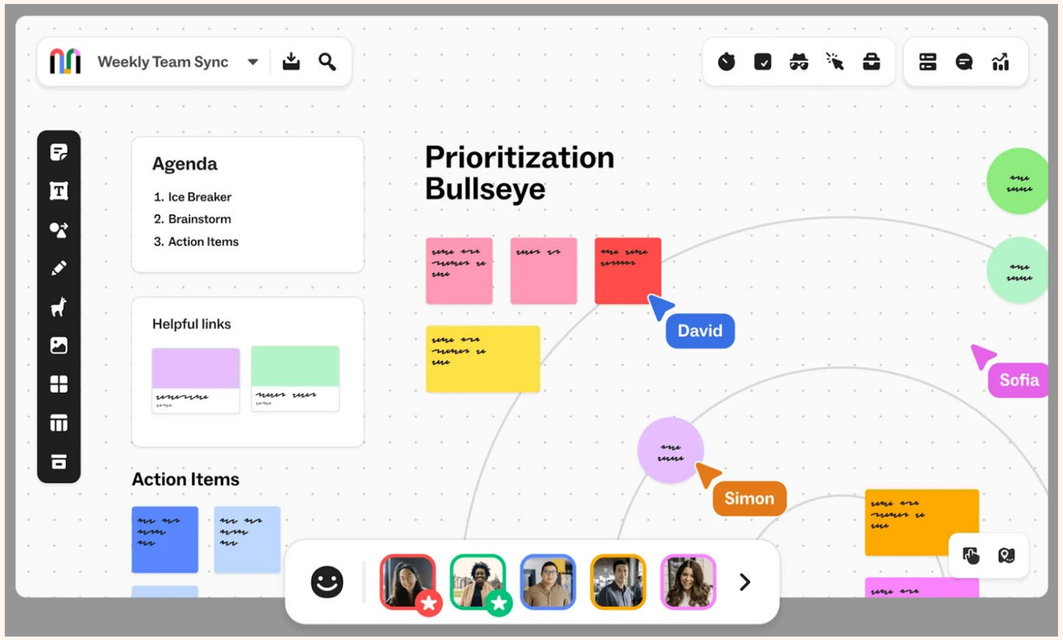

About Mural

- Founded in 2011, a leading visual collaboration platform designed to help teams work together in a shared, dynamic environment

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Agenda

- Twilio Segment Overview
- Warehouse Vision
- Customer Story feat. Mural
- Linked Audiences

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Companies have had to adapt as a result of major recent changes

Increasing data warehouse reliance

The rise of AI

The death of third-party cookies

Proliferation of martech tools

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Companies know it’s important to put customers first

Companies spend $96B+ a year trying to understand customers

Source data: Gartner Research, Market Share: Customer Experience and Relationship Management, Worldwide, 2022

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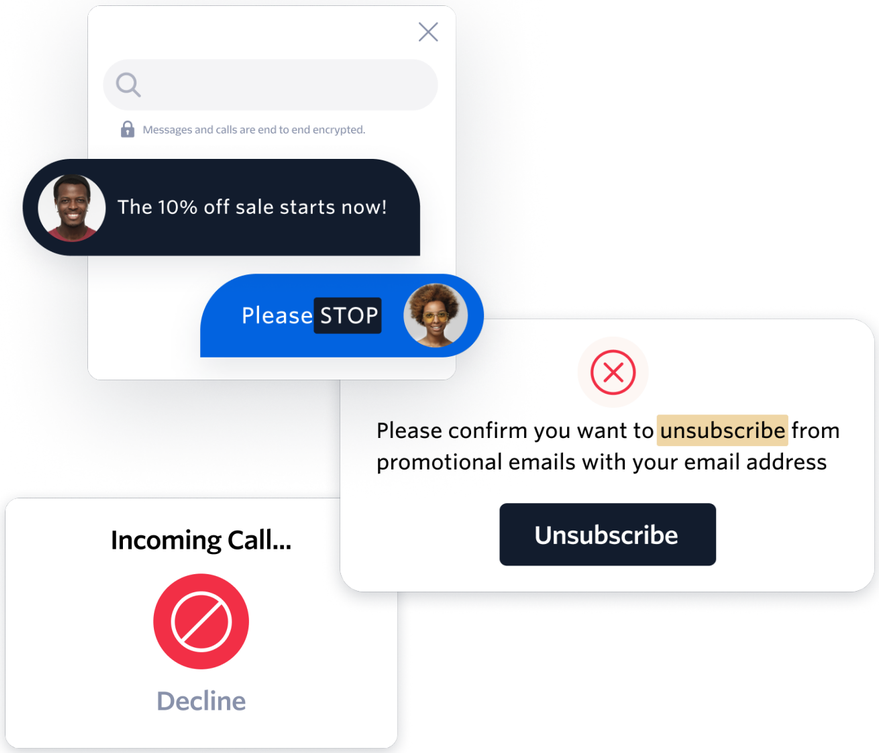
But customers are not feeling this on their end, which leaves companies extremely vulnerable



56% consider engagement personalized today

76% get frustrated when it doesn't happen

78% are more likely to buy again with personalization

McKinsey, Next in Personalization 2021 Report
Twilio, The State of Customer Engagement Report, 2023

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The problem: Disjointed tech stack experiences

4 common symptoms of a disjointed tech stack

Incomplete view of customer

Fragmented data

Patchwork solutions

Slow activation and iteration

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Customers want adaptive engagement that aligns with the reality of their moment-to-moment needs

4 common symptoms of a disjointed tech stack

- Incomplete view of customer
- Fragmented data
- Patchwork solutions
- Slow activation and iteration

Adaptive engagement

Unified view of the customer

Clean, consented and consistent data

Robust, flexible integrations

Predictive insights and rapid activation

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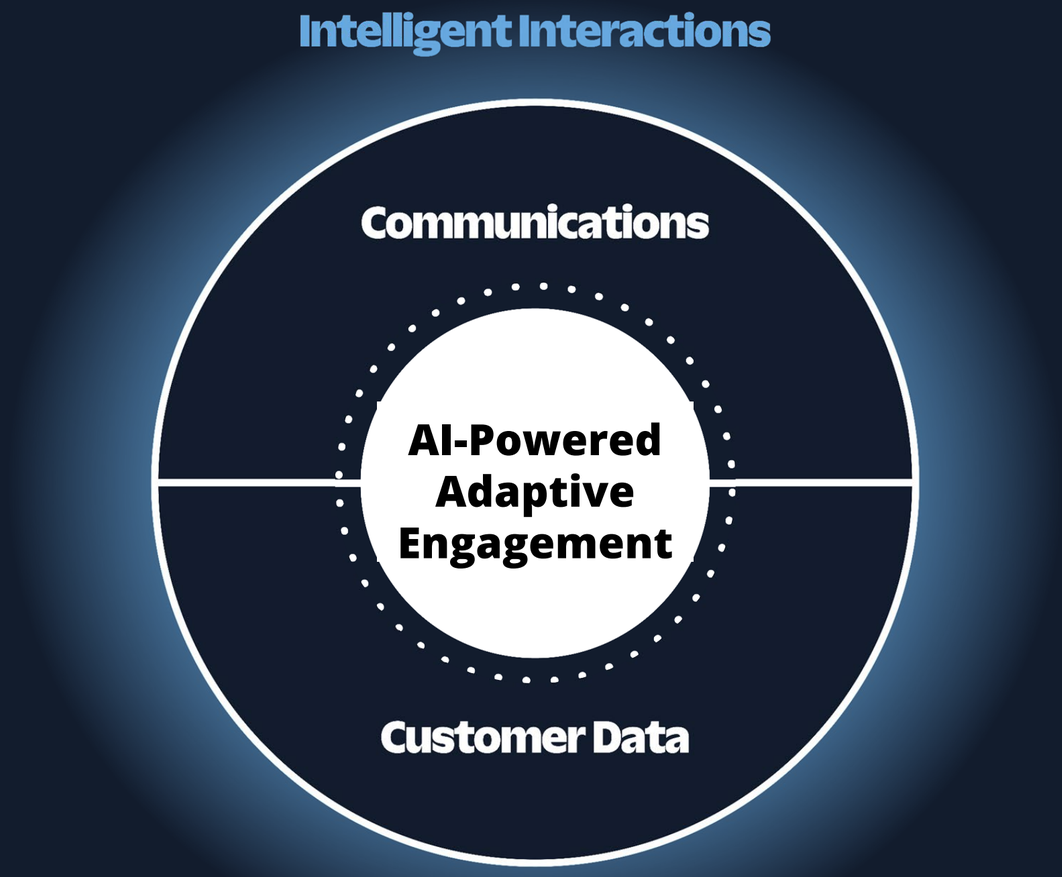
We believe the future of adaptive engagement is at the intersection of data, communications, and AI



Adaptive engagement is only possible with a CDP that is **complete,extensible, and scalable**

Most complete real-time CDP

Modular components for data ingestion, unification, & activation address the widest variety of business models, industries, and use cases

Extensibility on an open platform

Pre-built connections and developer-focused interfaces work with your stack and warehouse

Proven and trusted at scale

Event streaming architecture built to handle enterprise consumer scale

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Most complete real-time CDP

Segment Services | Warehouse Services

Activation

- Audience Builder
- Journey Builder
- Profile API
- Linked Audiences
- Linked Journeys

Profiles

- ID Resolution
- Computed Traits
- Predictions
- Profile Sync
- Linked Profiles
- Linked Events

Data

- SDK Catalog
- Protocols
- Privacy Portal
- 450+ Destinations
- Reverse ETL
- Low Copy

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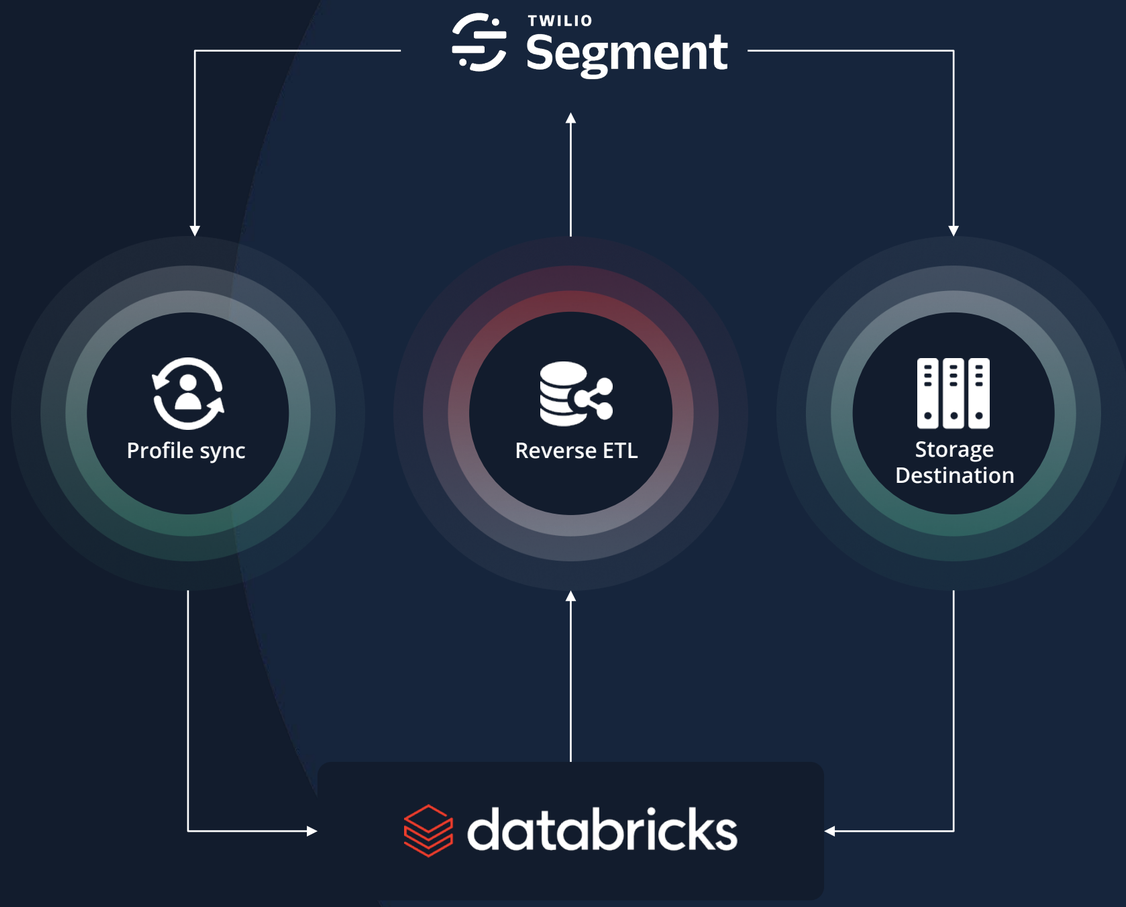
Warehouse-Centric Vision



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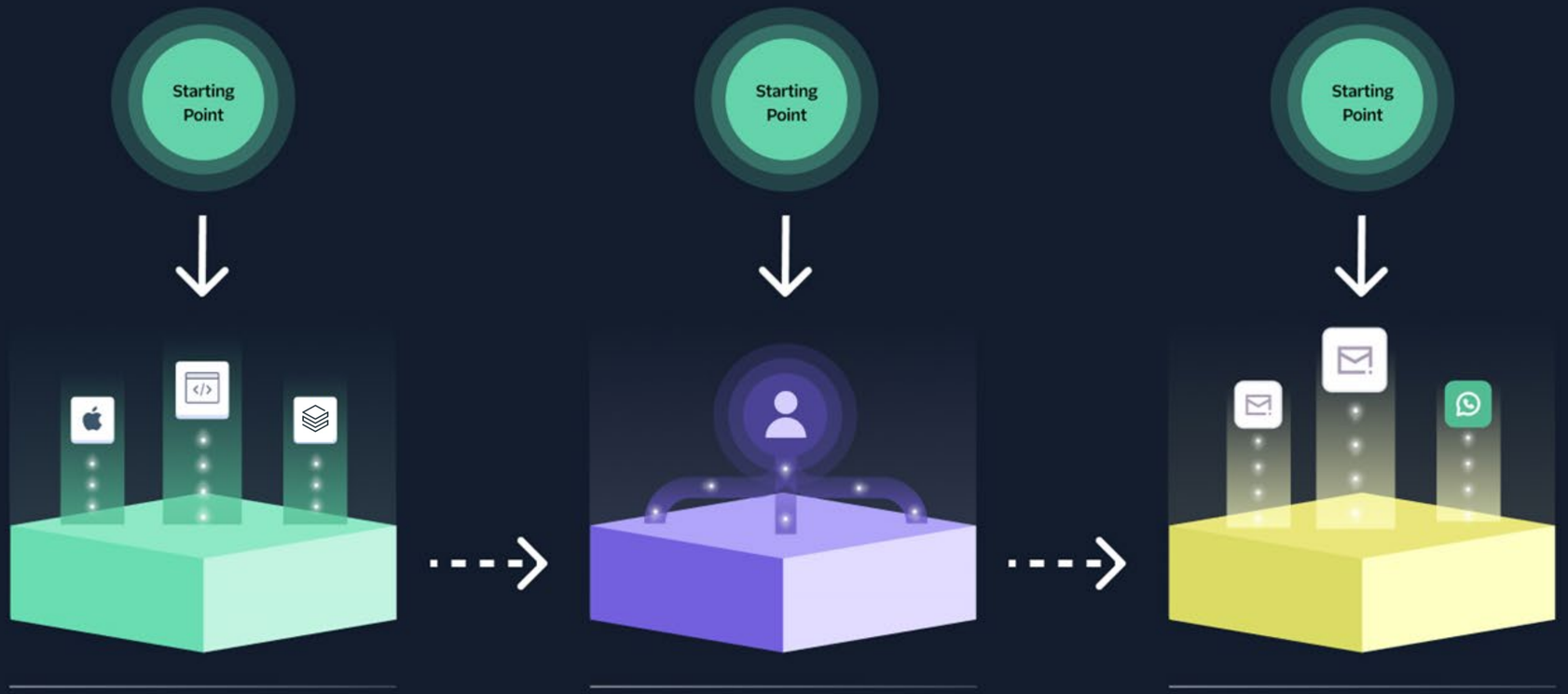
Data warehouses are now a key piece of Segment's CDP data architecture

We are able to meet and sell to customers where they are



Collect

Real-time event capture

Unify

Create profiles via Segment ID resolution

Activate

Launch audiences, journeys, & campaigns

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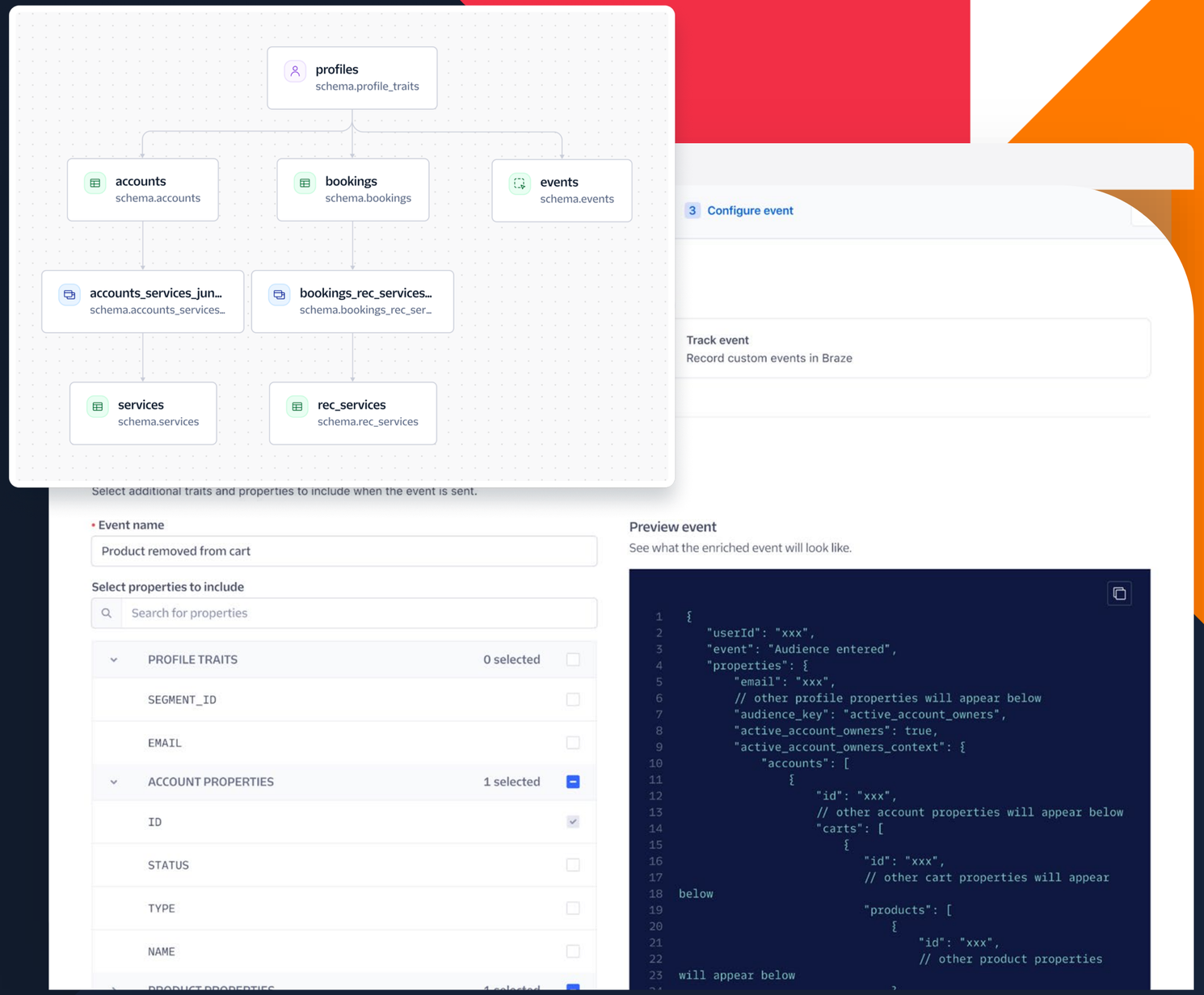
Rich advanced targeting powered by real-time and warehouse data



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Customer Story Featuring Mural

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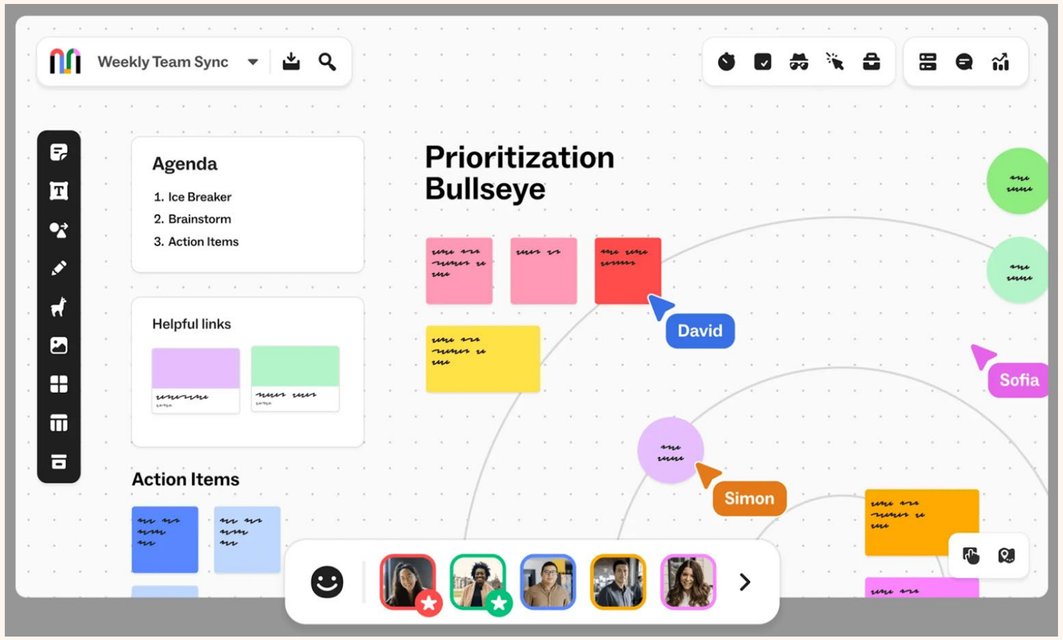

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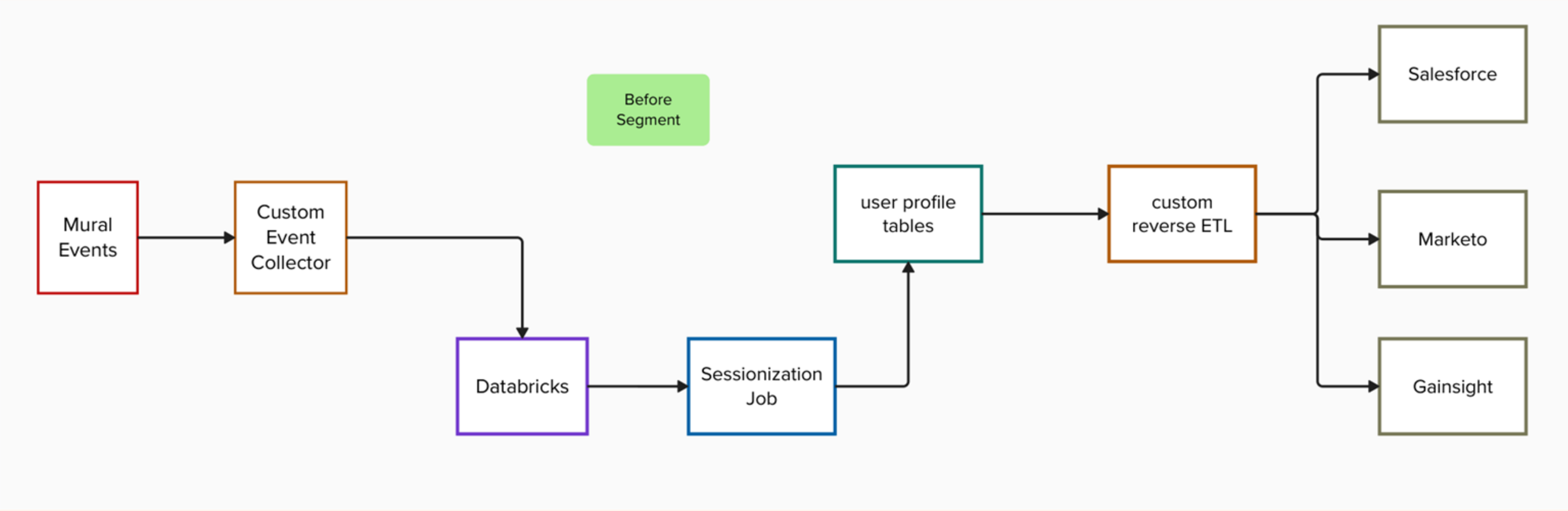
Mural data architecture at a glance.... Before Segment



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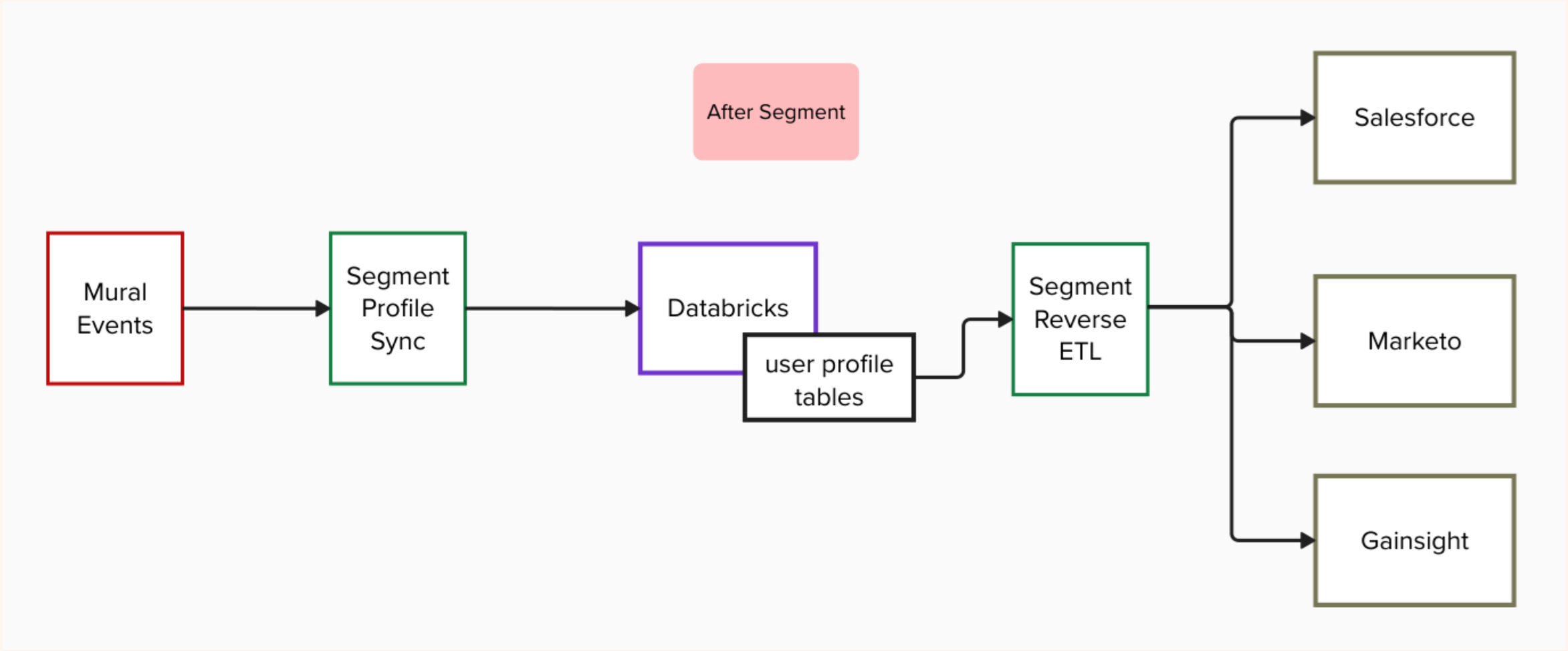
Mural data architecture at a glance... After Segment



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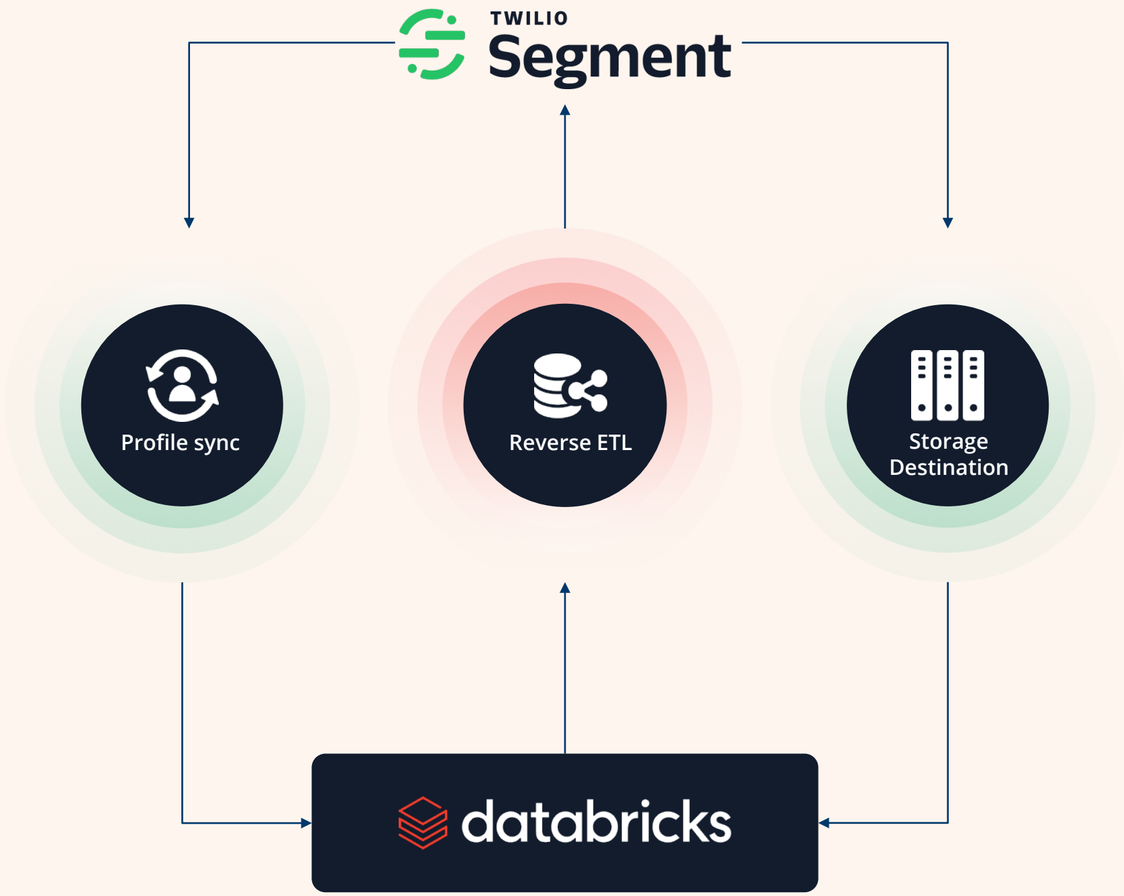
Mural’s warehouse-centric vision



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How Mural integrates Twilio Segment across the organization

Product

Segment Profile Sync

- Audit Report
- User Milestone
- User Activity Summary

Segment Connections

- User Activity to Databricks
- Satismeter NPS score Integration

Sales

Segment Reverse ETL: Salesforce

- Company Statistics
- Activity Summary
- Churn Report

Segment Reverse ETL: Gainsight

- User Activity

Marketing

Segment Connections

- MQL to Marketo via Kinesis
- Google Analytics Sync
- Facebook Audience Sync
- Optimizely Sync
- LinkedIn Campaign Sync

Segment Reverse ETL: Marketo

- User Profile Segmentation

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Linked Audiences

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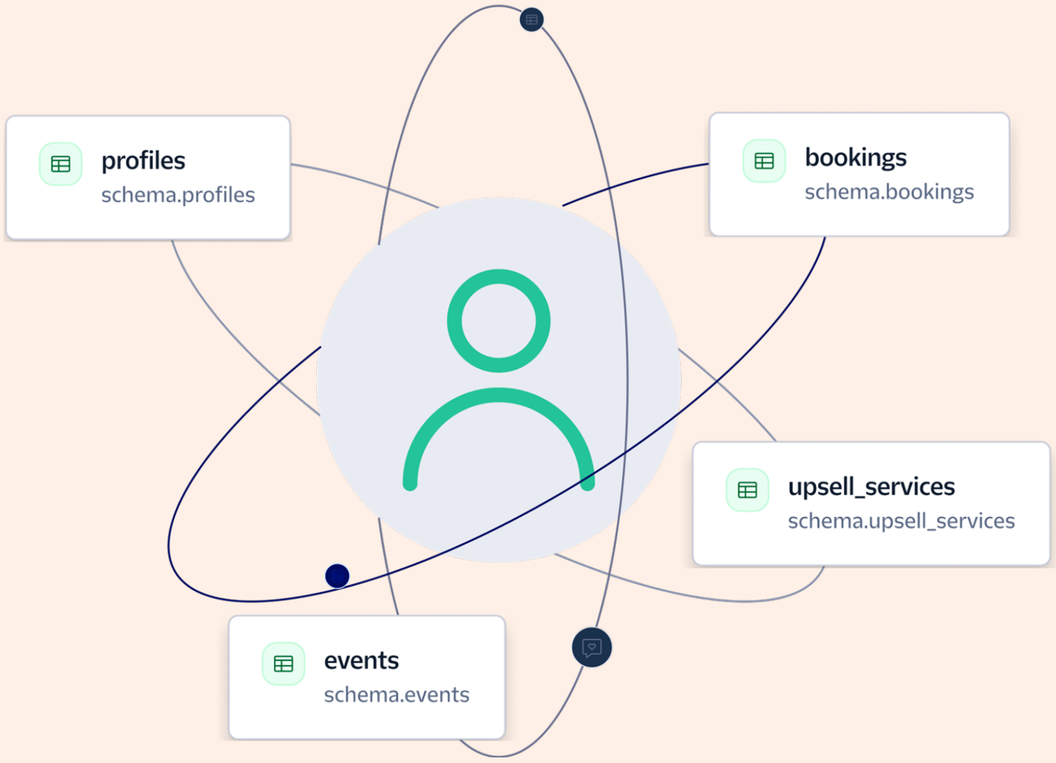
Now with Linked Audiences

A warehouse-first solution that powers individualized customer experiences



- Link all rich data back to a profile
- Unlock more precise personalization with deeper audience targeting
- Faster time to value to activate campaigns
- Powered by Data Graph

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Want to learn more?
Stop by the Twilio Segment booth #86

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twilio segment

DAILY RAFFLE DRAWING

Scan this QR code and complete the quiz to win a Breville Barista Touch Espresso Machine!

Thank You

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Q&A

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Appendix

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twilio segment

Don’t miss our session!

Empower your Marketing through Data Sharing with Twilio Segment

Tuesday, June 11
2:50 PM - 3:30 PM PDT
Moscone South
Esplanade, Rm 151

with featured speakers:

Greg Yeutter
Principal Solutions Engineer
Twilio Segment

Ananth Packkildurai
Principal Engineer
Mural

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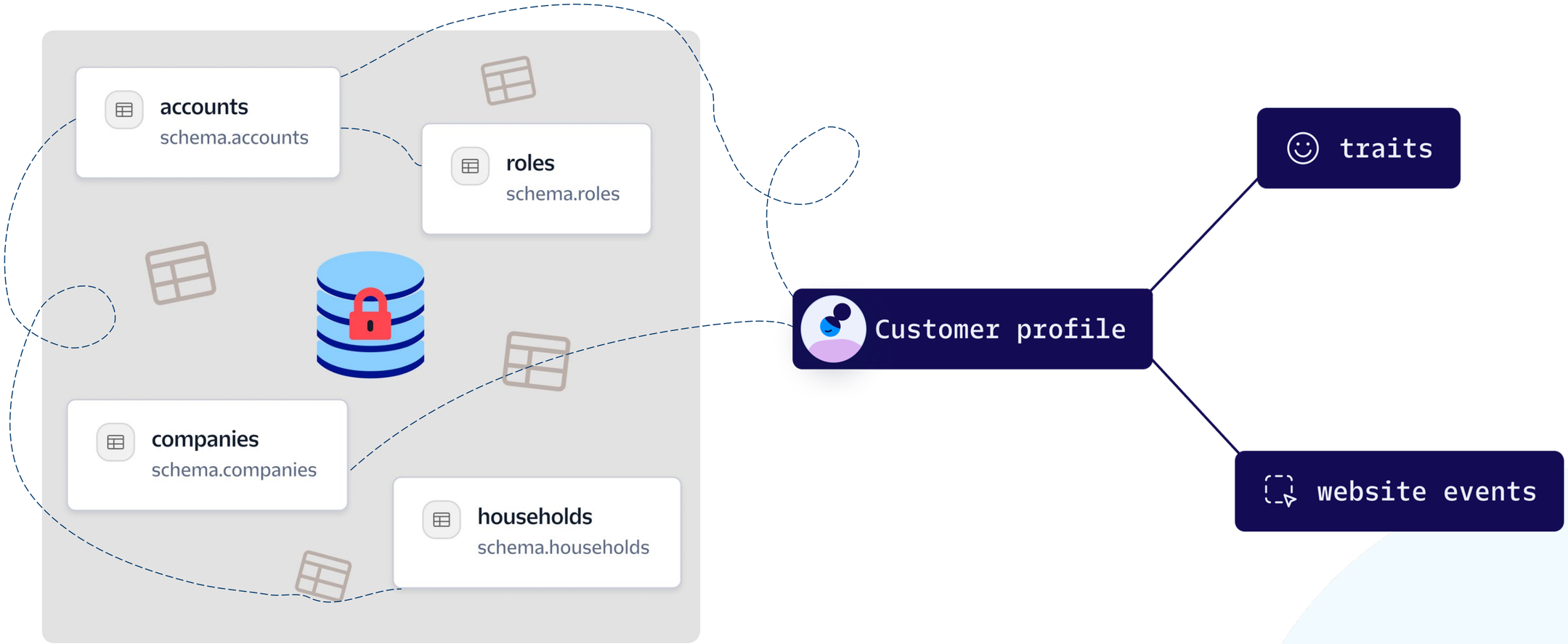
Before Linked Audiences: Relational Warehouse Data Unaccessible



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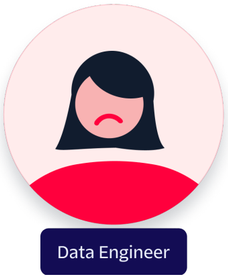
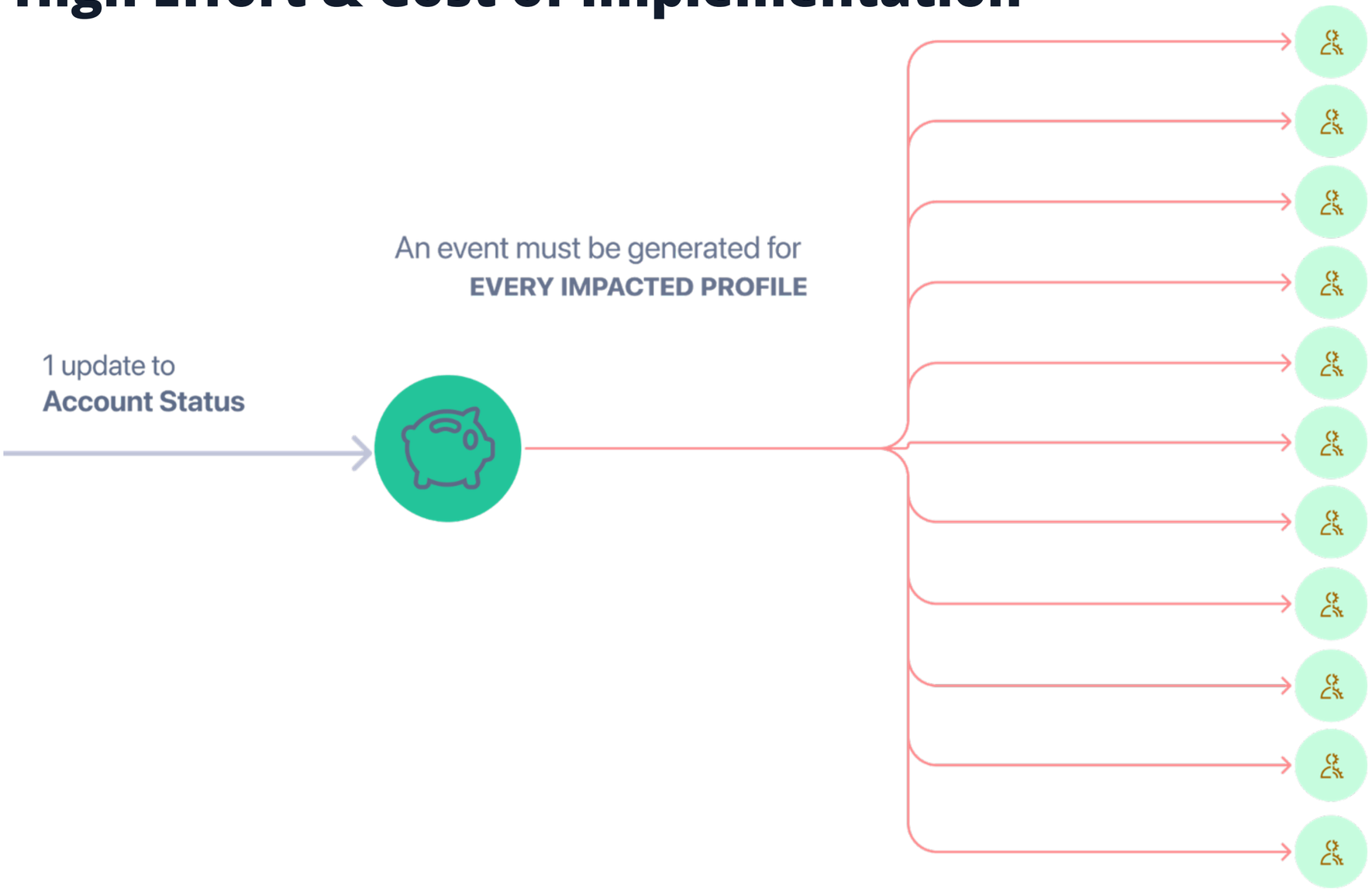
Before Linked Audiences:
High Effort & Cost of Implementation





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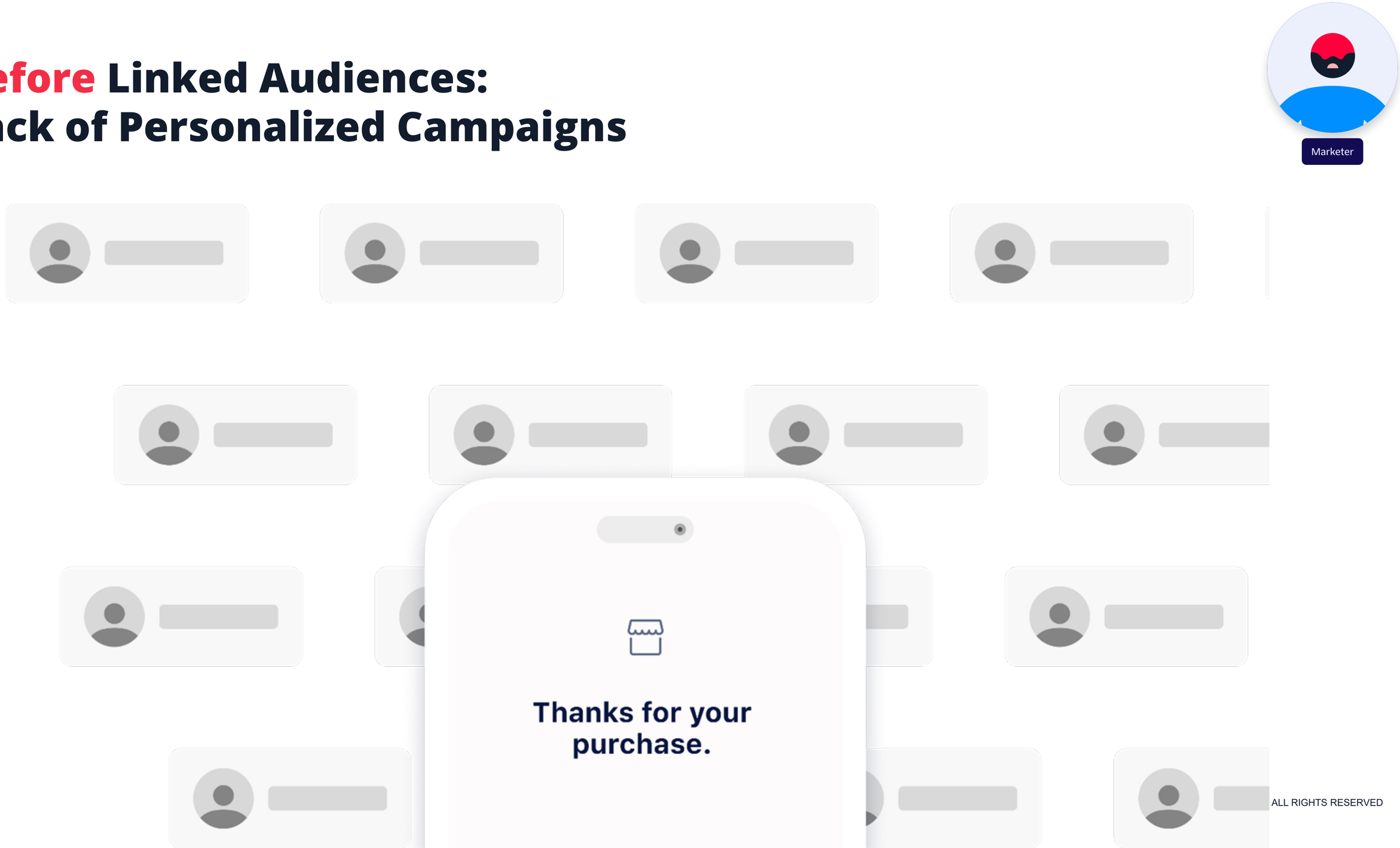
Before Linked Audiences:
Lack of Personalized Campaigns



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Use Case Example #1: Financial Services

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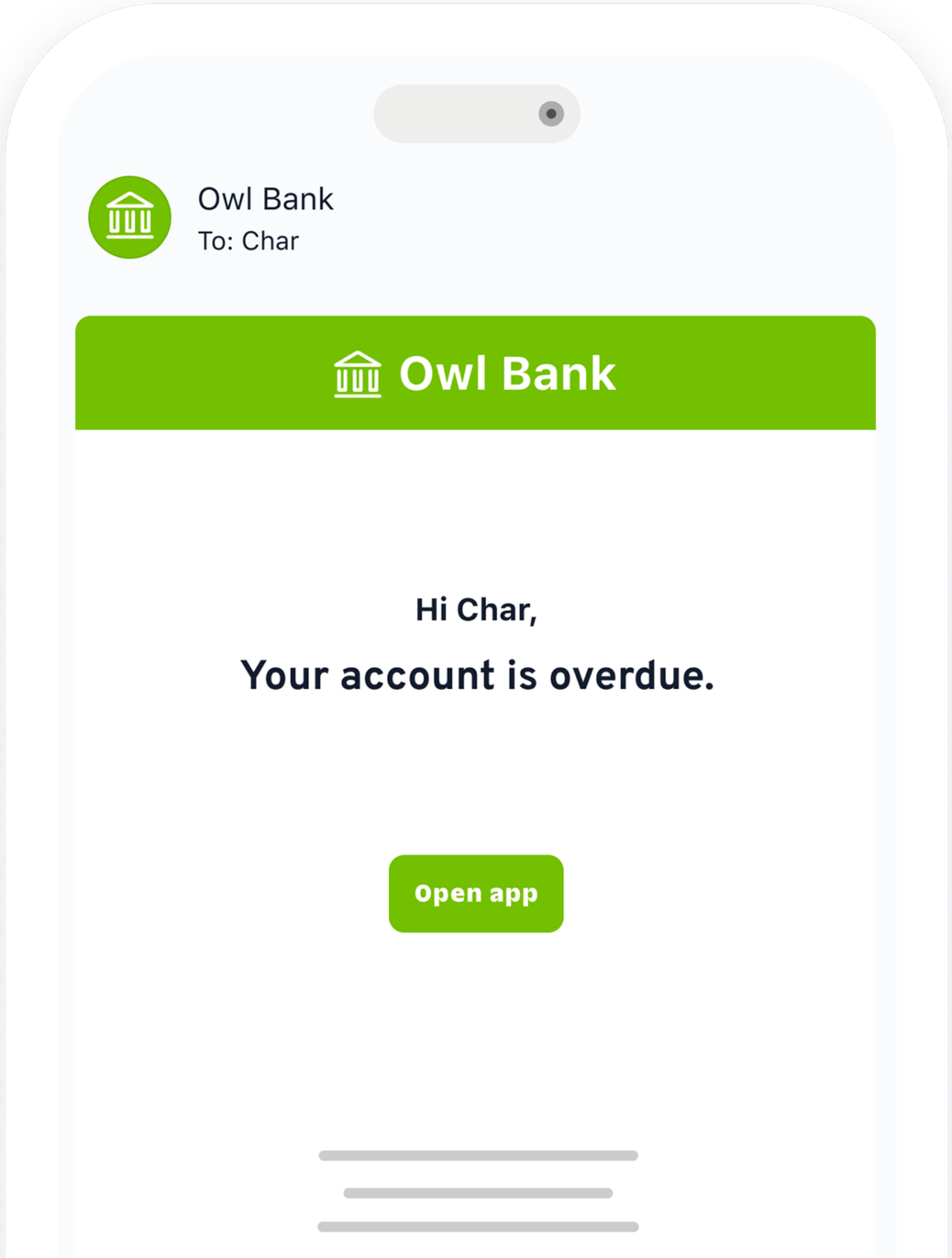

Email reminder to pay off overdue credit card

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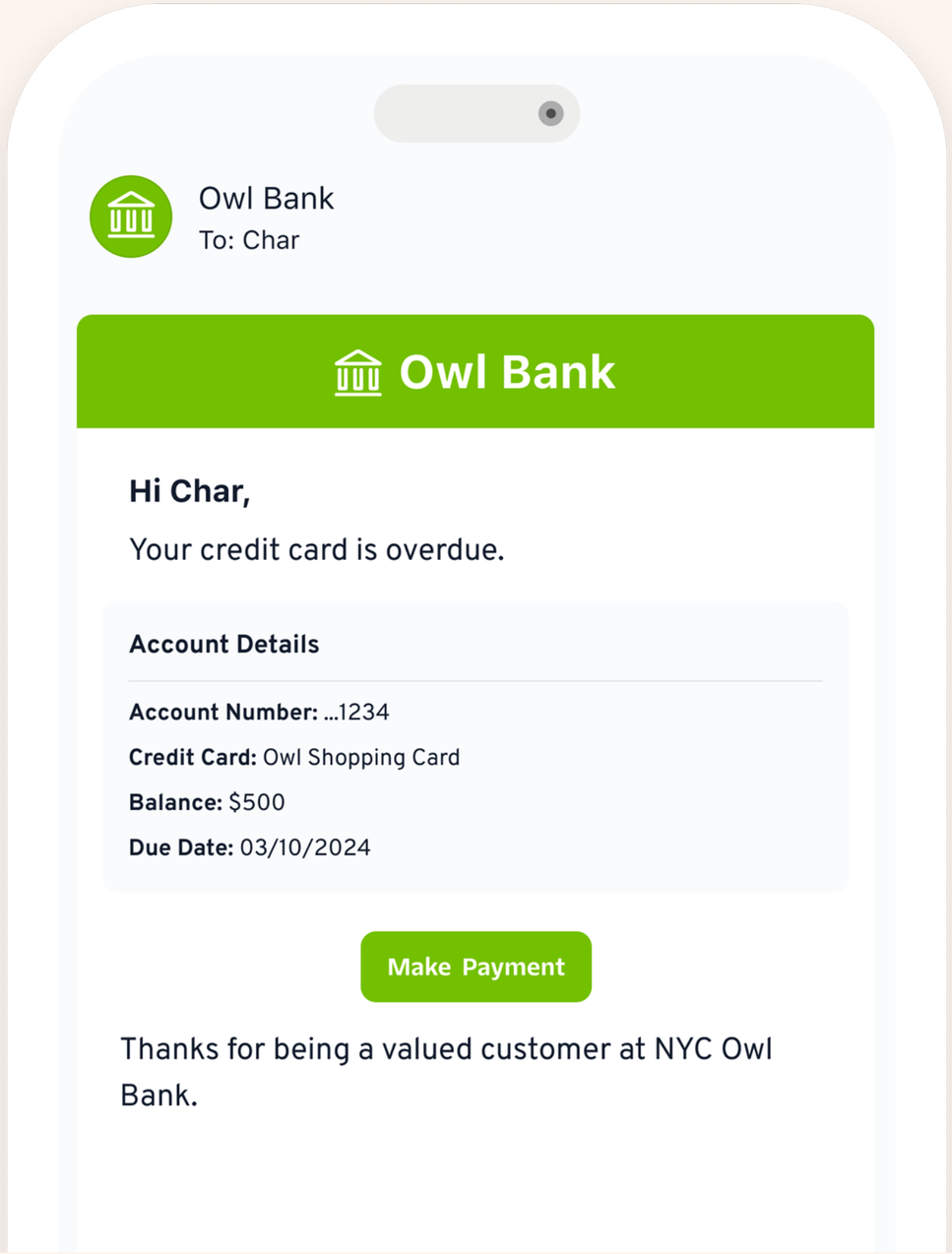

Personalized email reminder to pay off overdue credit card targeting with:

Warehouse data

- Checking account details: `account_number`
- Card details: `credit_card_type`, `card_status`, `card_balance`, `due_date`

Relational data

- User can have multiple accounts (e.g. checking, savings, retirement)
- An account can have many cards (e.g. debit, credit)
- A card can have many transactions

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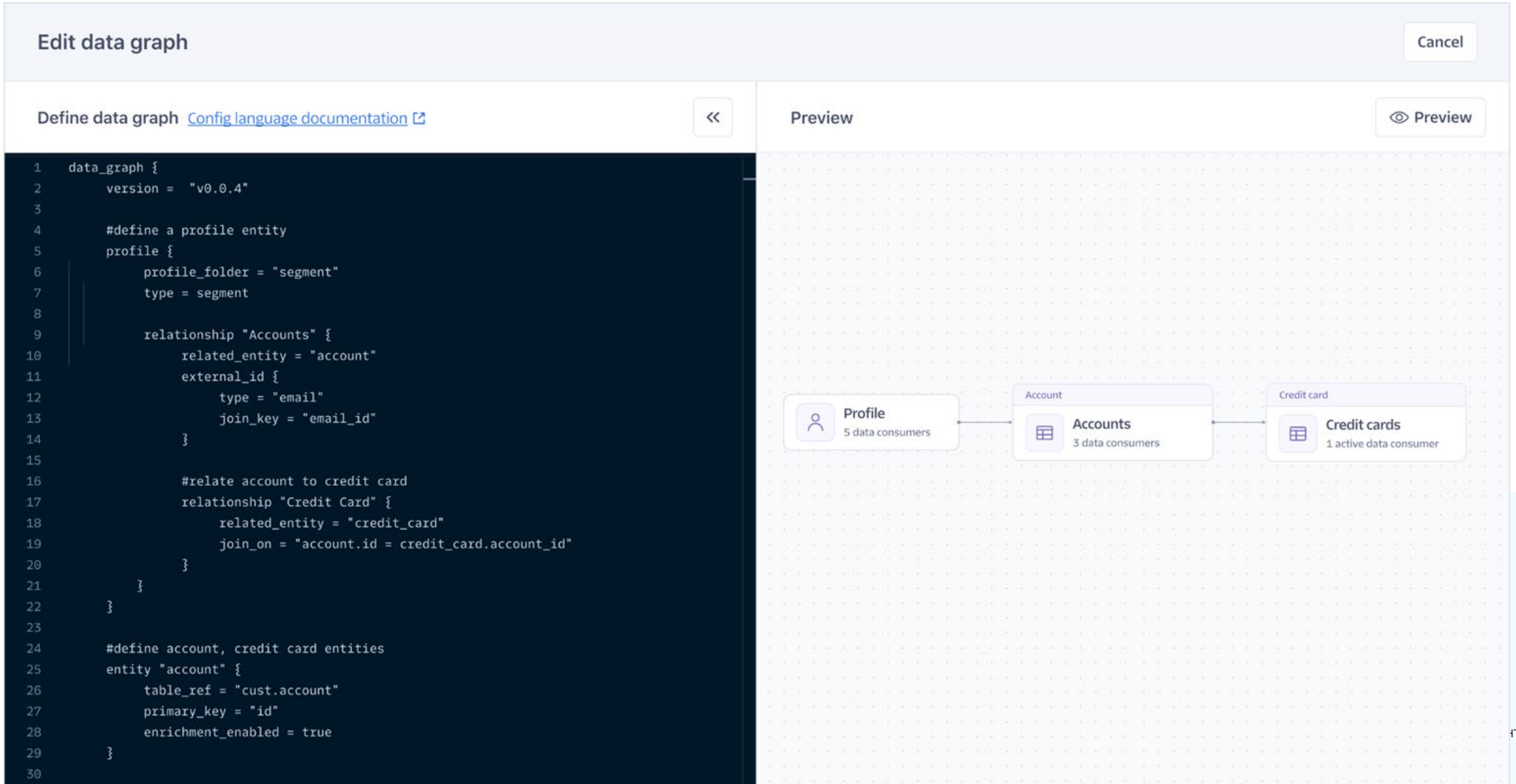
Linked Audience: Data Graph



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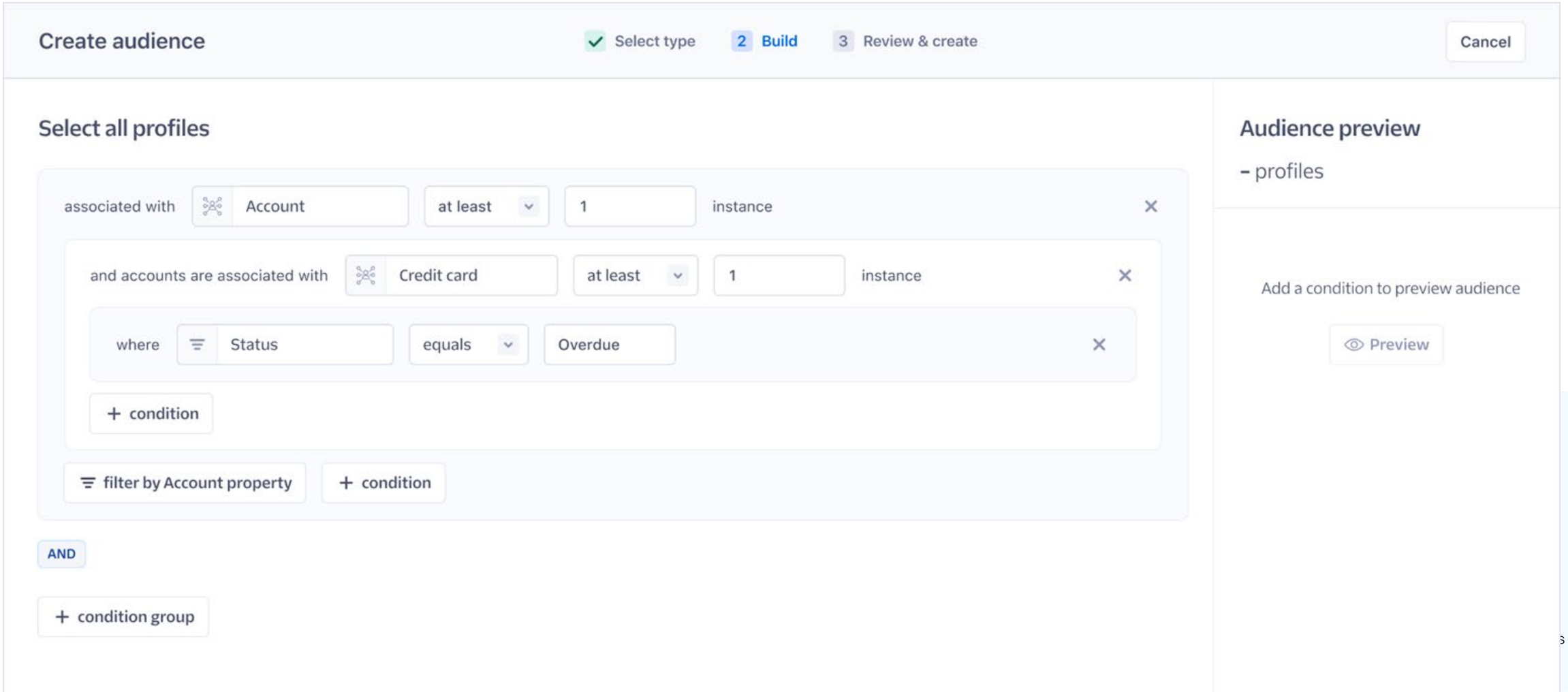
Linked Audience: Builder

Target an audience of customers who own a checking account with a credit card with an overdue balance



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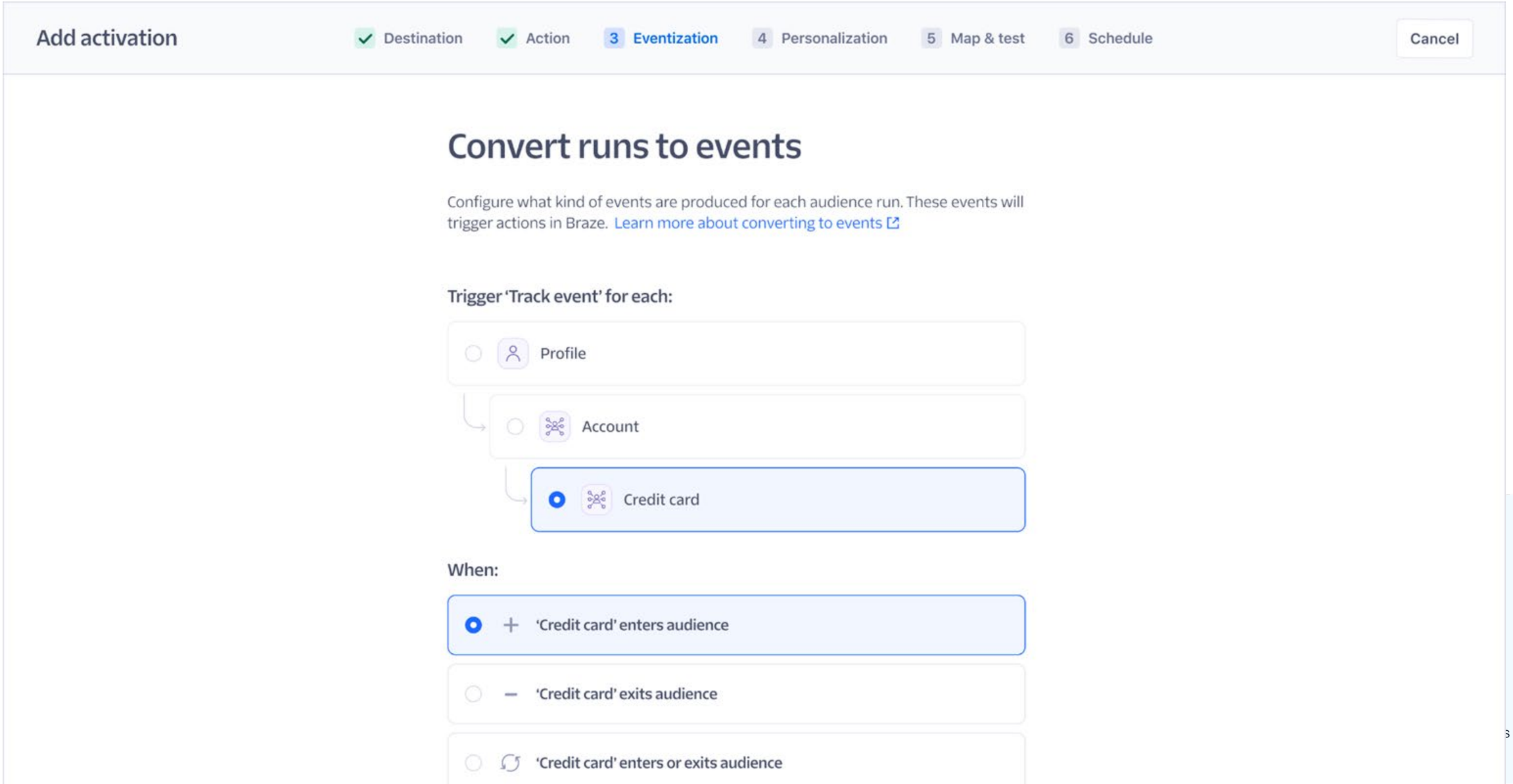
Linked Audience: Activation



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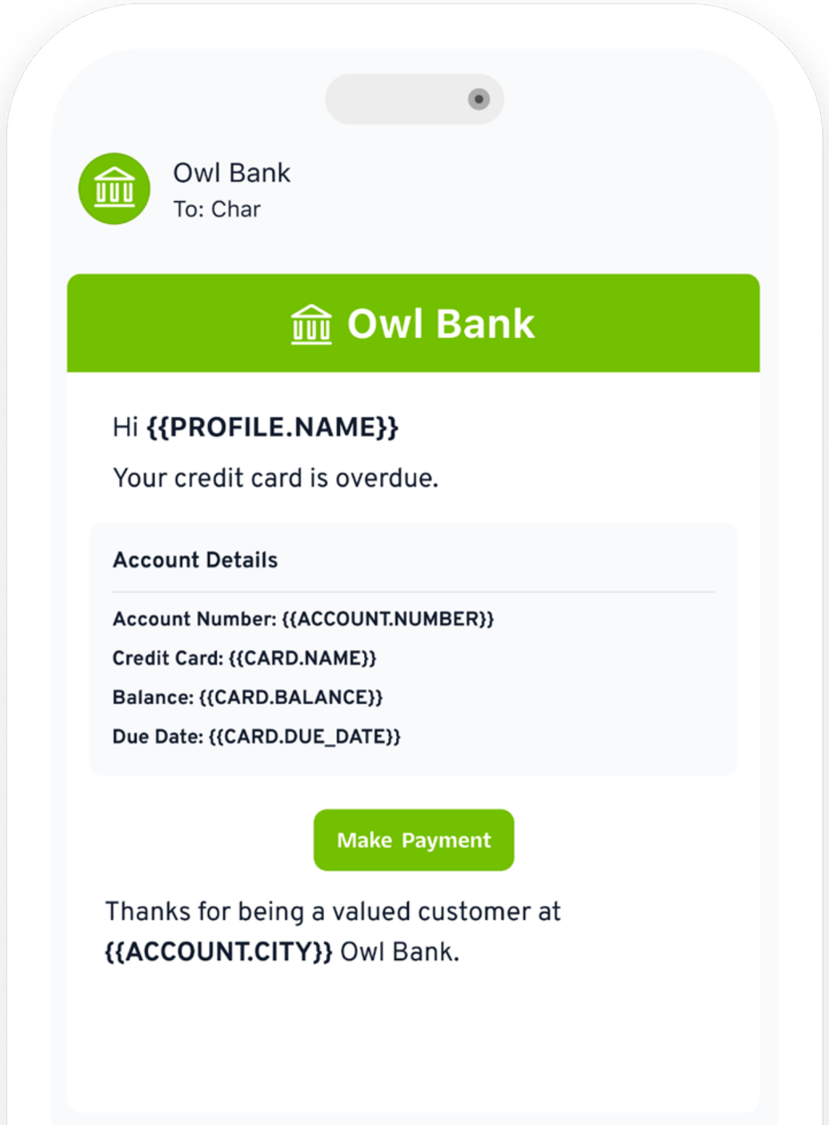
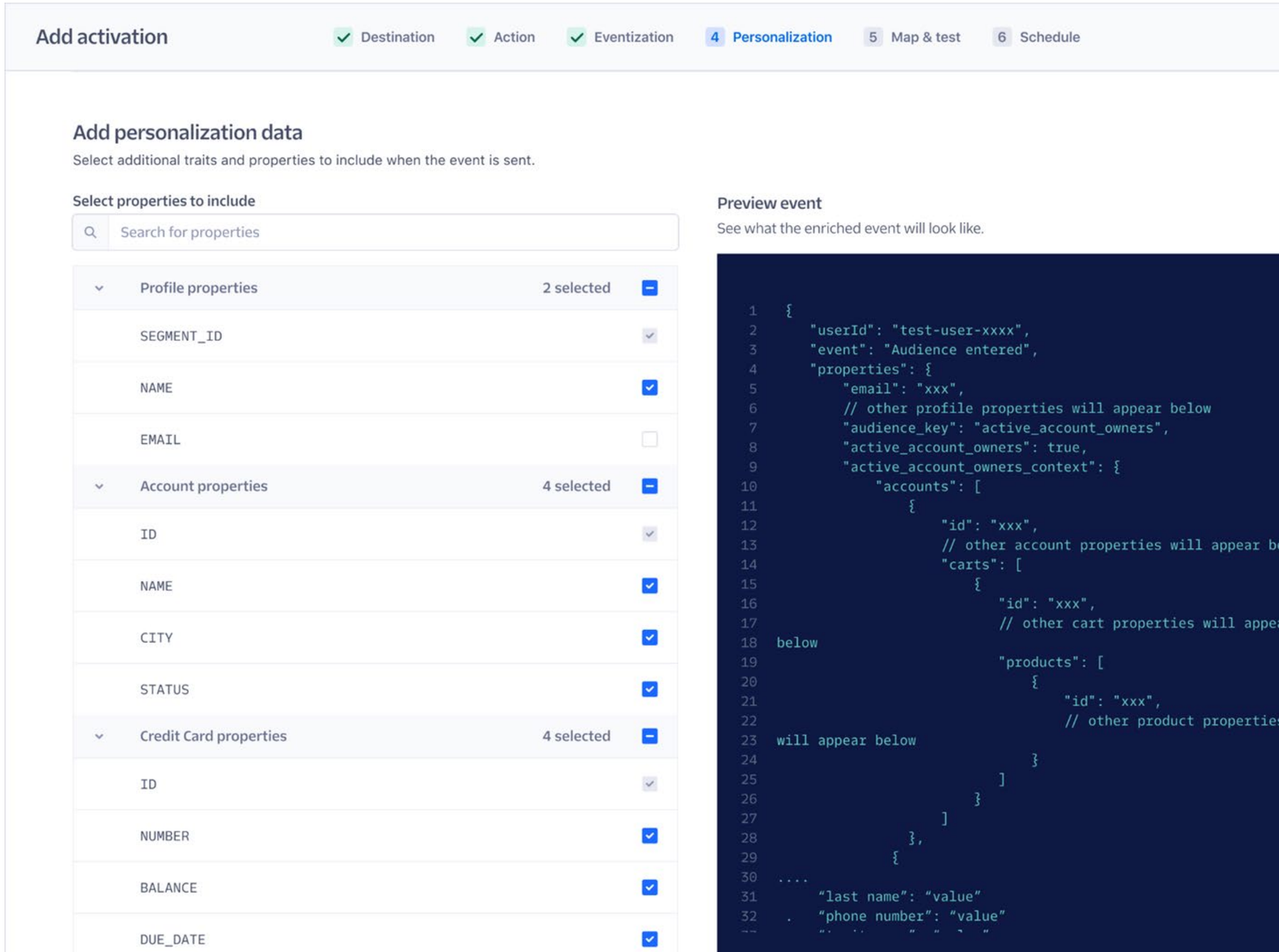
Linked Audience: Select Personalization Data





Use Case Example #2: SaaS Business

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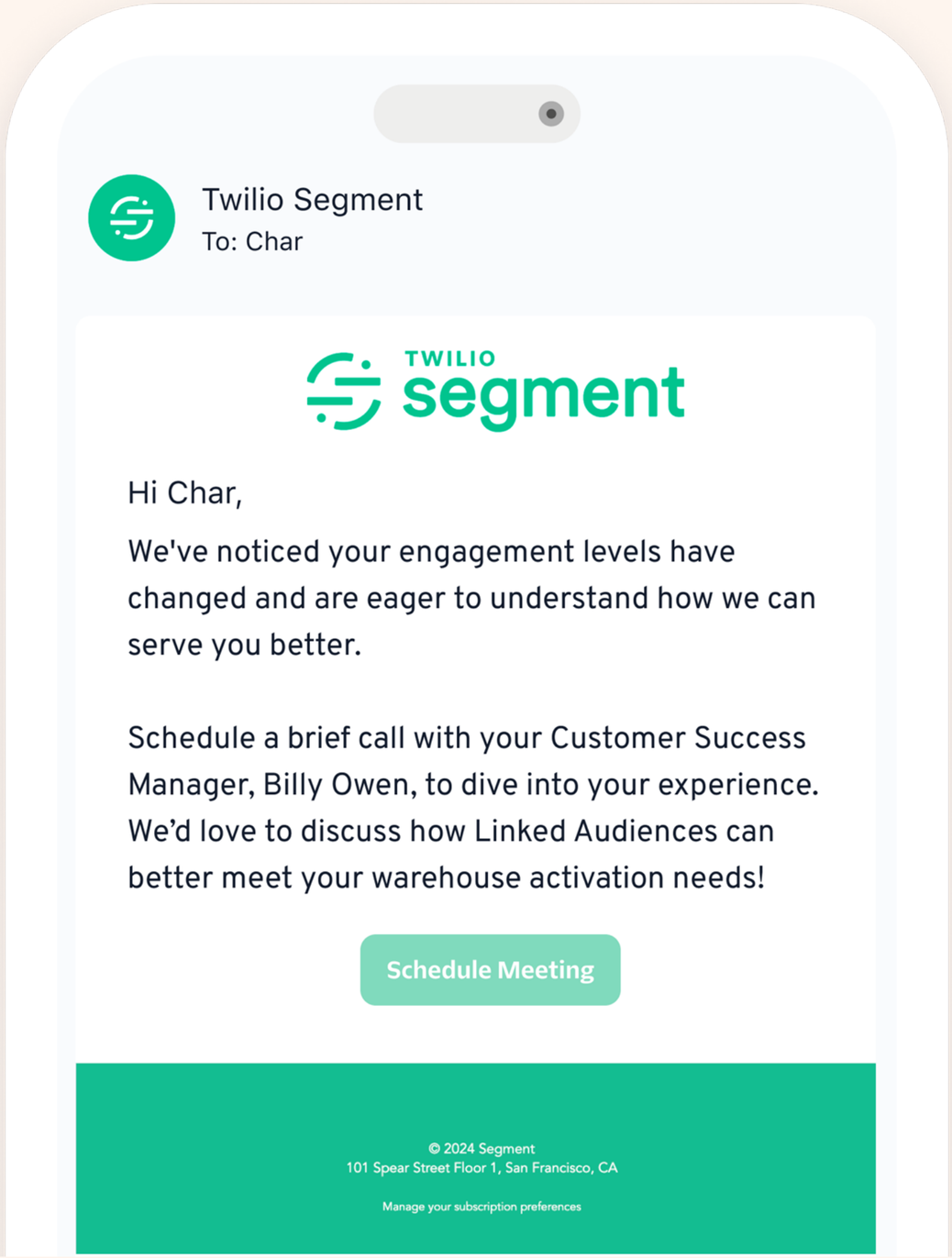

Personalized email with customers with low engagement score before renewals:

Warehouse data

- Workspace details: `workspace_arr`, `engagement_score`, `term_end_date`

Relational data

- User can belong to multiple Segment workspaces
- Role can depend on the workspace

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Linked Audience: Data Graph

Edit data graph

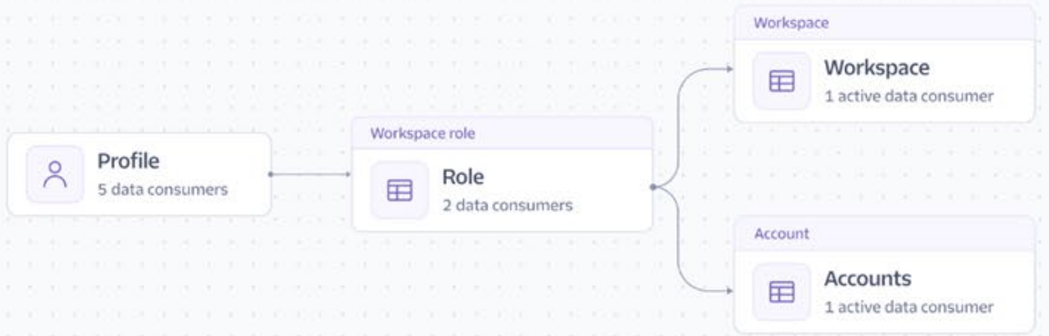
Cancel

Define data graph [Config language documentation]

```
data_graph {
    version =  "v0.0.4"

    #define a profile entity
    profile {
        profile_folder = "segment"
        type = segment

        relationship "Accounts" {
            related_entity = "account"
            external_id {
                type = "email"
                join_key = "email_id"
            }

            #relate account to credit card
            relationship "Credit Card" {
                related_entity = "credit_card"
                join_on = "account.id = credit_card.account_id"
            }
        }
    }

    #define account, credit card entities
    entity "account" {
        table_ref = "cust.account"
        primary_key = "id"
        enrichment_enabled = true
    }
```

Preview

Preview



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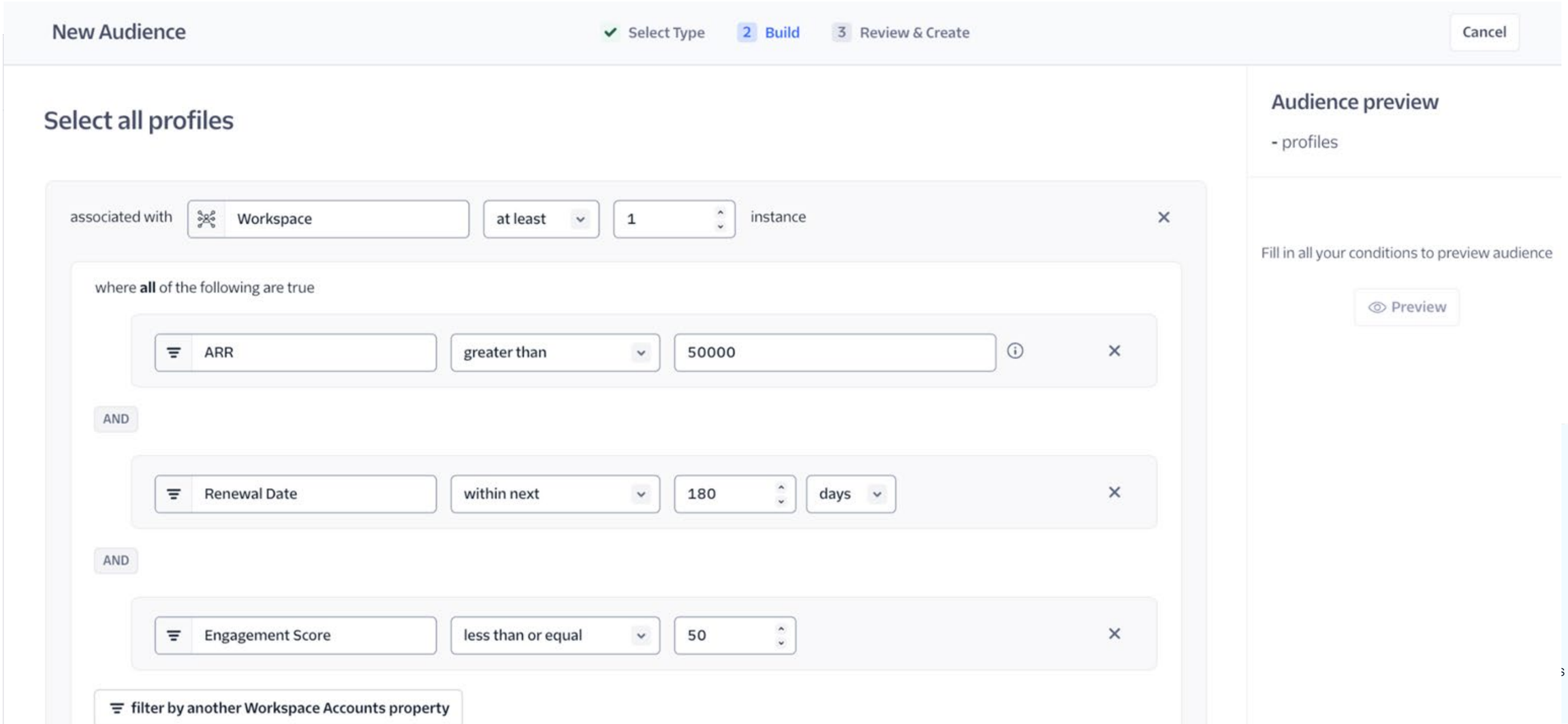
Linked Audience: Builder

Target an audience of data personas with a low engagement score before renewals



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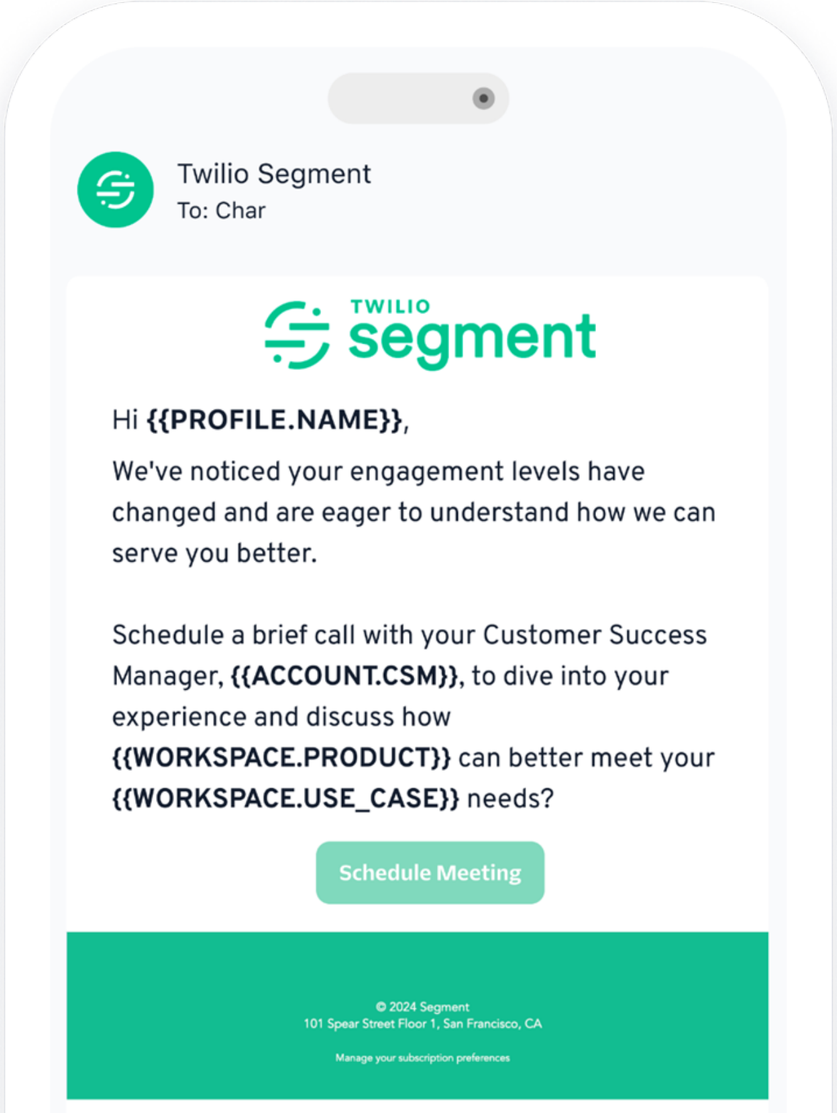
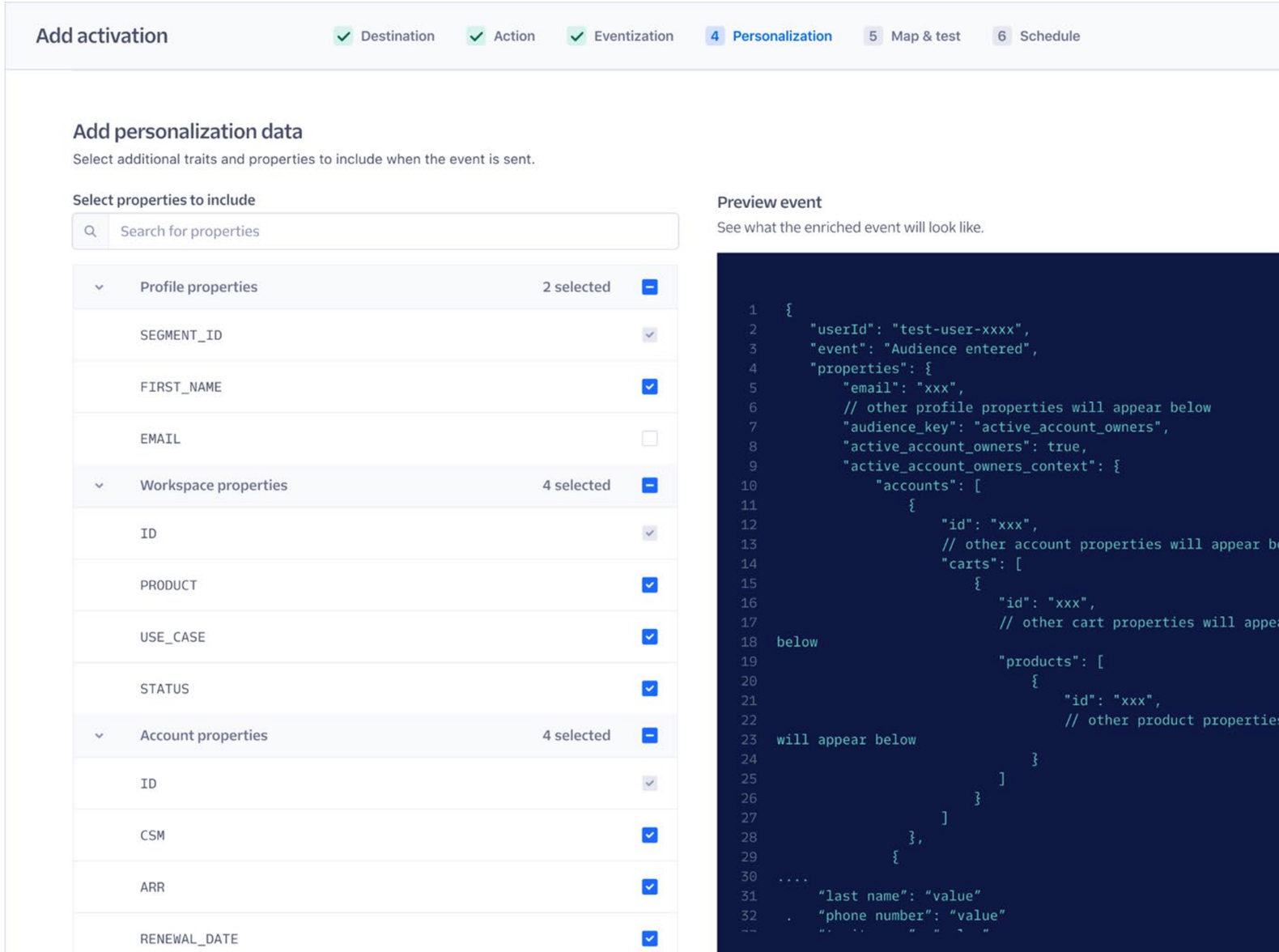
Linked Audience: Activate & Personalize





Use Case
Discovery & Qualification

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Linked Audiences: 5 Discovery Questions

1. What role does the data warehouse play in your CDP strategy today?
1. Do you have any security & compliance requirements to centralize data in the warehouse?
1. Which warehouse are you using? What data models do you have in your warehouse that you'd like to leverage to define segments or audiences in downstream tools?
1. What are your exact targeting use cases that involve relating complex data models?
    - Tell us about your marketing team's ability to run self-service campaigns today and any friction points with this process
1. What are your latency expectations for your use case?

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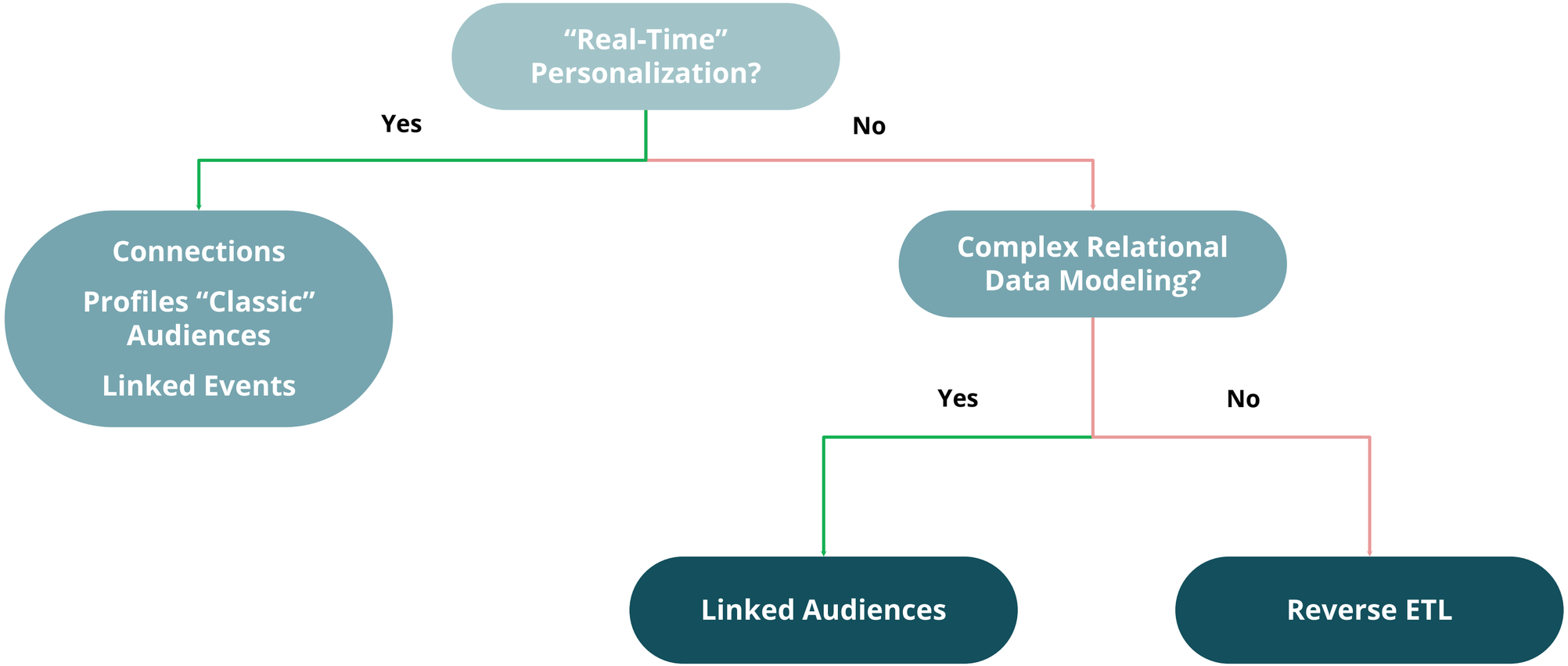
Linked Audiences: Use Case Discovery Tree



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Segment before

All roads go through Connections regardless of customer needs or existing capabilities

Customer with specific use case and data stack

Collect

Real-time event capture

Unify

Create profiles via Segment ID resolution

Activate

Launch audiences, journeys, & campaigns

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Data warehouses are now a key piece of CDP data architecture

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1 Trillion

Rows synced per month

2.5 Billion

Events per second

Segment is proven at scale in both warehouse and real-time

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