



Empower your Marketing through Data Sharing with Twilio Segment



Today's Presenters



Ananth Packkildurai
Principal Engineer
Mural



Greg Yeutter
Principal Solutions Engineer
Twilio Segment



About Mural

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

Agenda

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

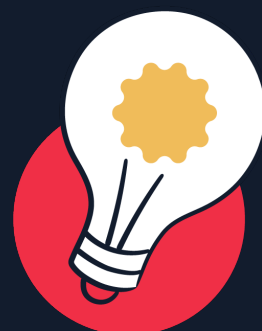




Companies have had to adapt as a result of major recent changes



**Increasing data
warehouse reliance**



The rise of AI



**The death of
third-party cookies**



**Proliferation of
martech tools**

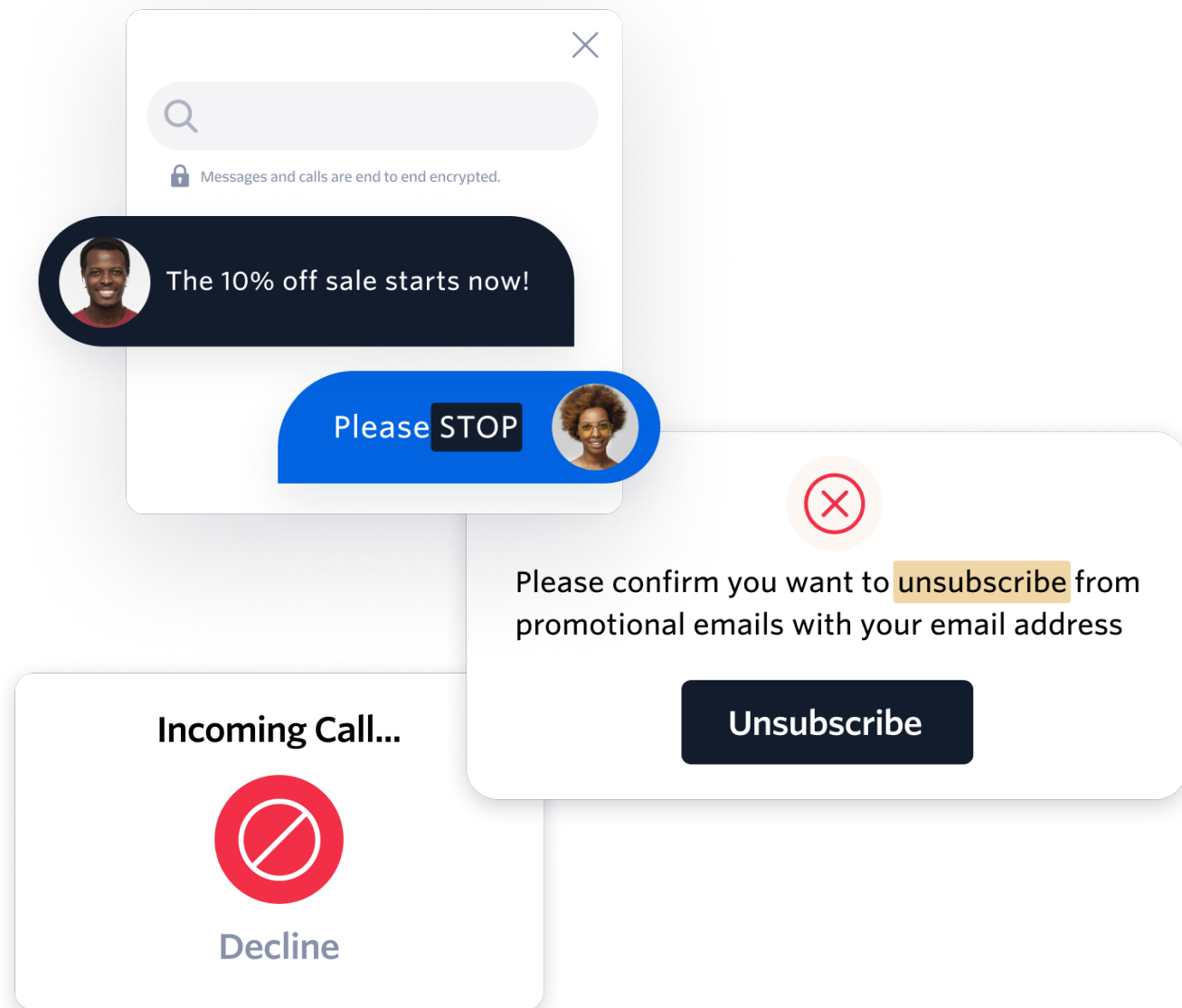


Companies know it's important to put customers first

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

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

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*



The problem: Disjointed tech stack experiences

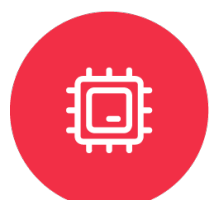
4 common symptoms of a disjointed tech stack



Incomplete view of customer



Fragmented data



Patchwork solutions



Slow activation and iteration



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

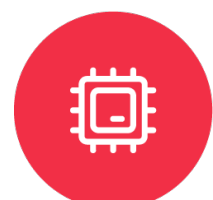
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Slow activation and iteration

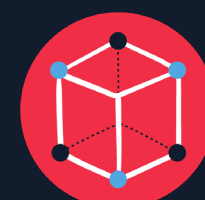
Adaptive engagement



Unified view of the customer



Clean, consented and consistent data



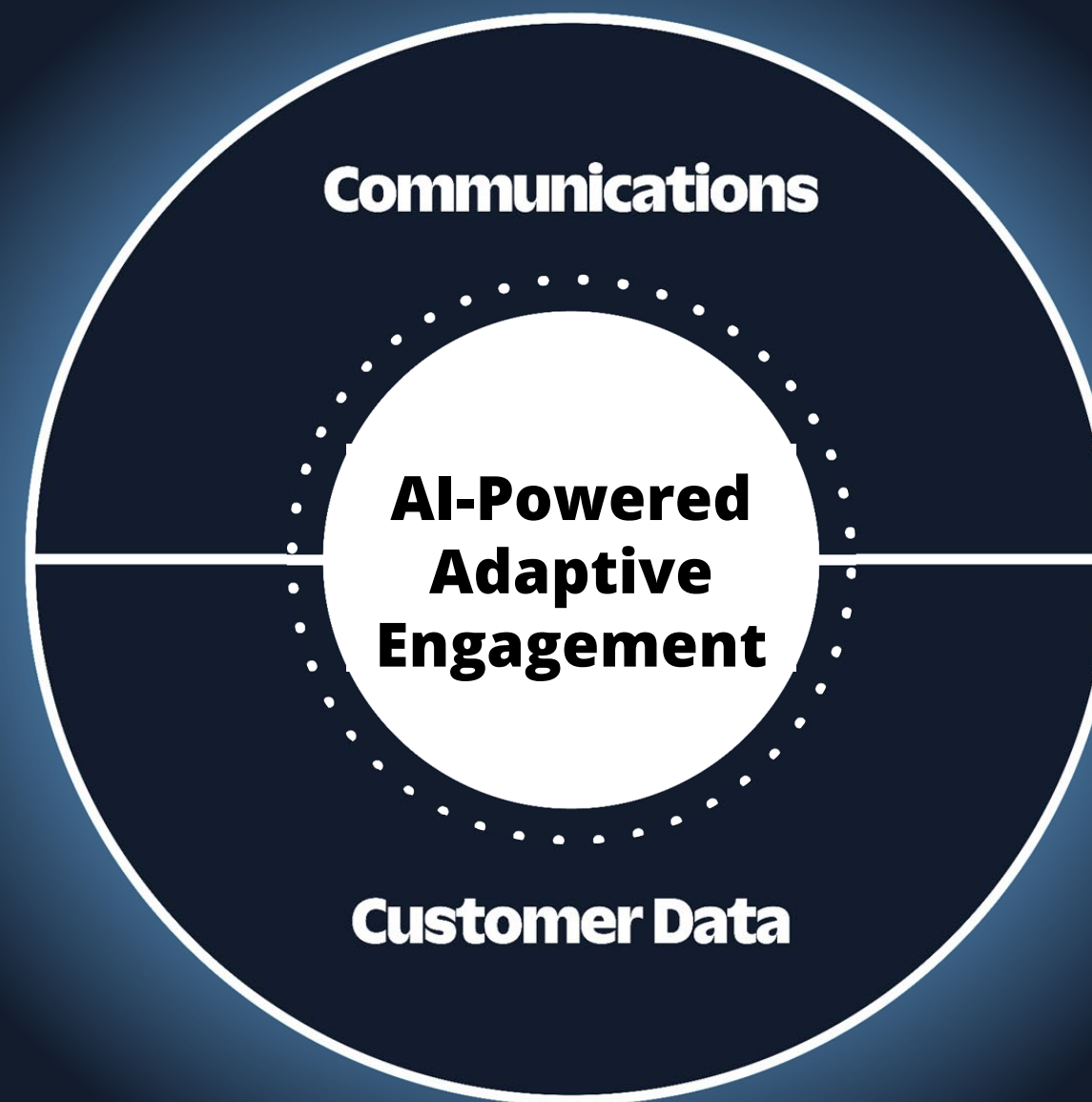
Robust, flexible integrations



Predictive insights and rapid activation

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

Intelligent Interactions



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





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

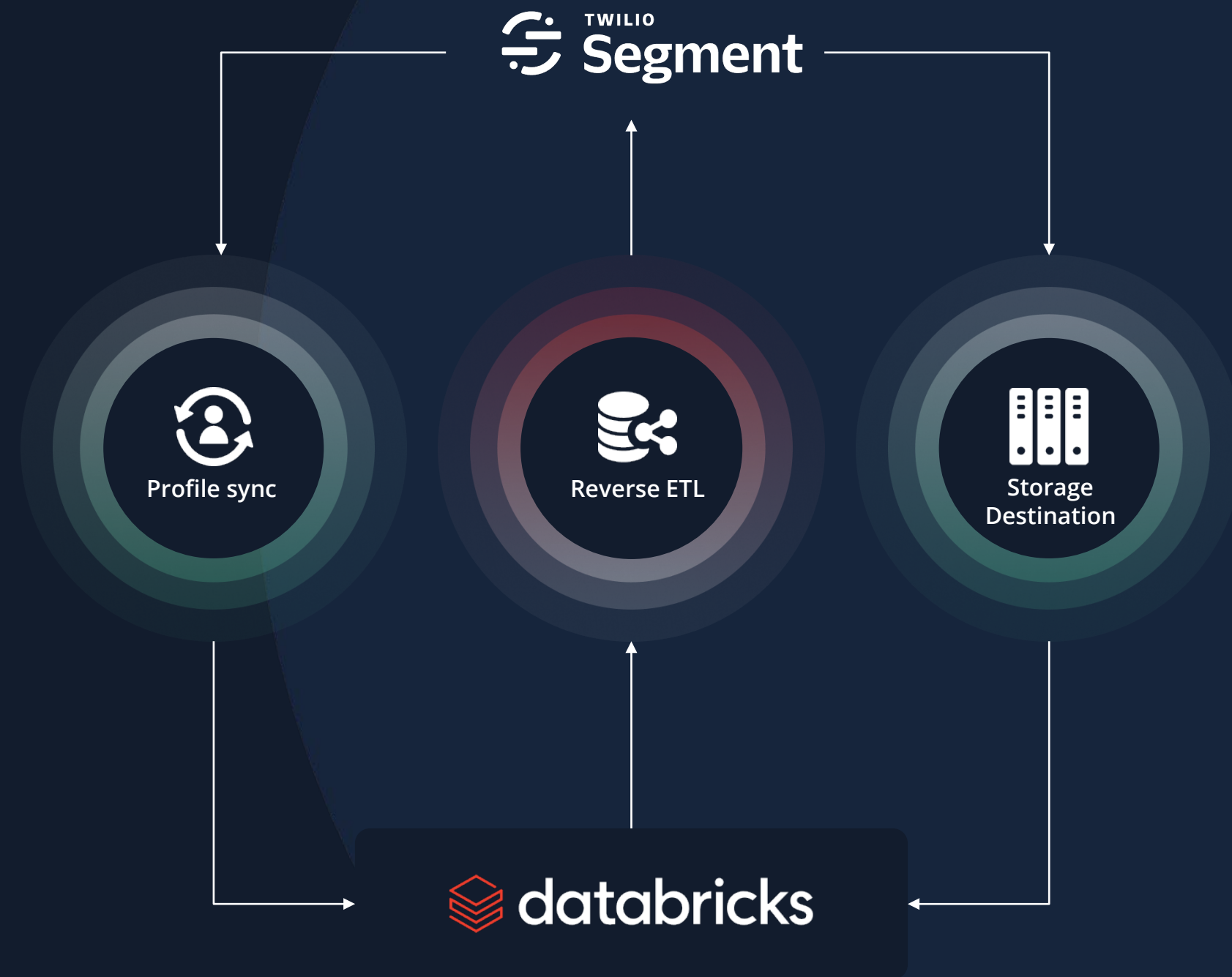
Privacy
Portal

450+
Destinations

Reverse ETL

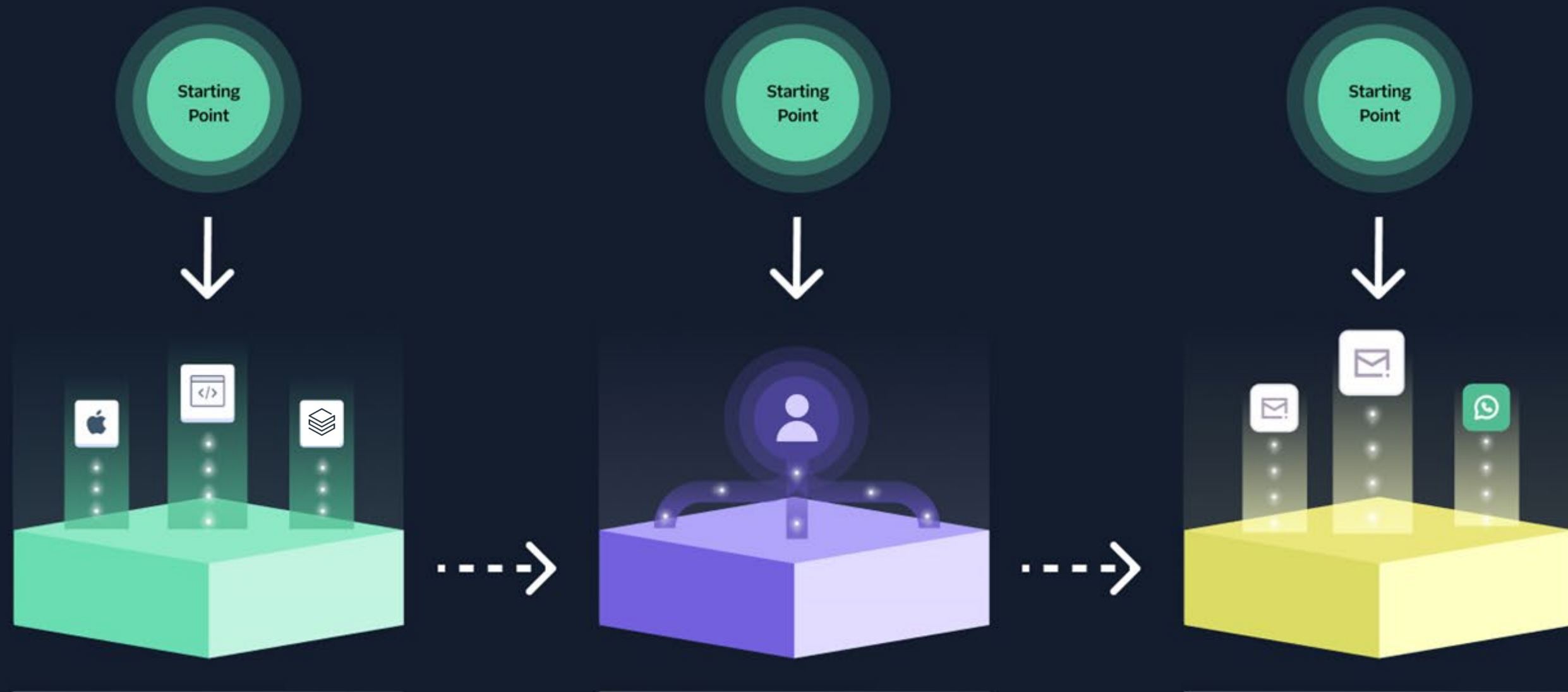
Low Copy

Warehouse-Centric Vision



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

Rich advanced targeting powered by real-time and warehouse data



3 Configure event

Track event
Record custom events in Braze

Select additional traits and properties to include when the event is sent.

Event name
Product removed from cart

Select properties to include
Search for properties

PROFILE TRAITS	0 selected	
SEGMENT_ID	<input type="checkbox"/>	
EMAIL	<input type="checkbox"/>	
ACCOUNT PROPERTIES	1 selected	
ID	<input checked="" type="checkbox"/>	
STATUS	<input type="checkbox"/>	
TYPE	<input type="checkbox"/>	
NAME	<input type="checkbox"/>	

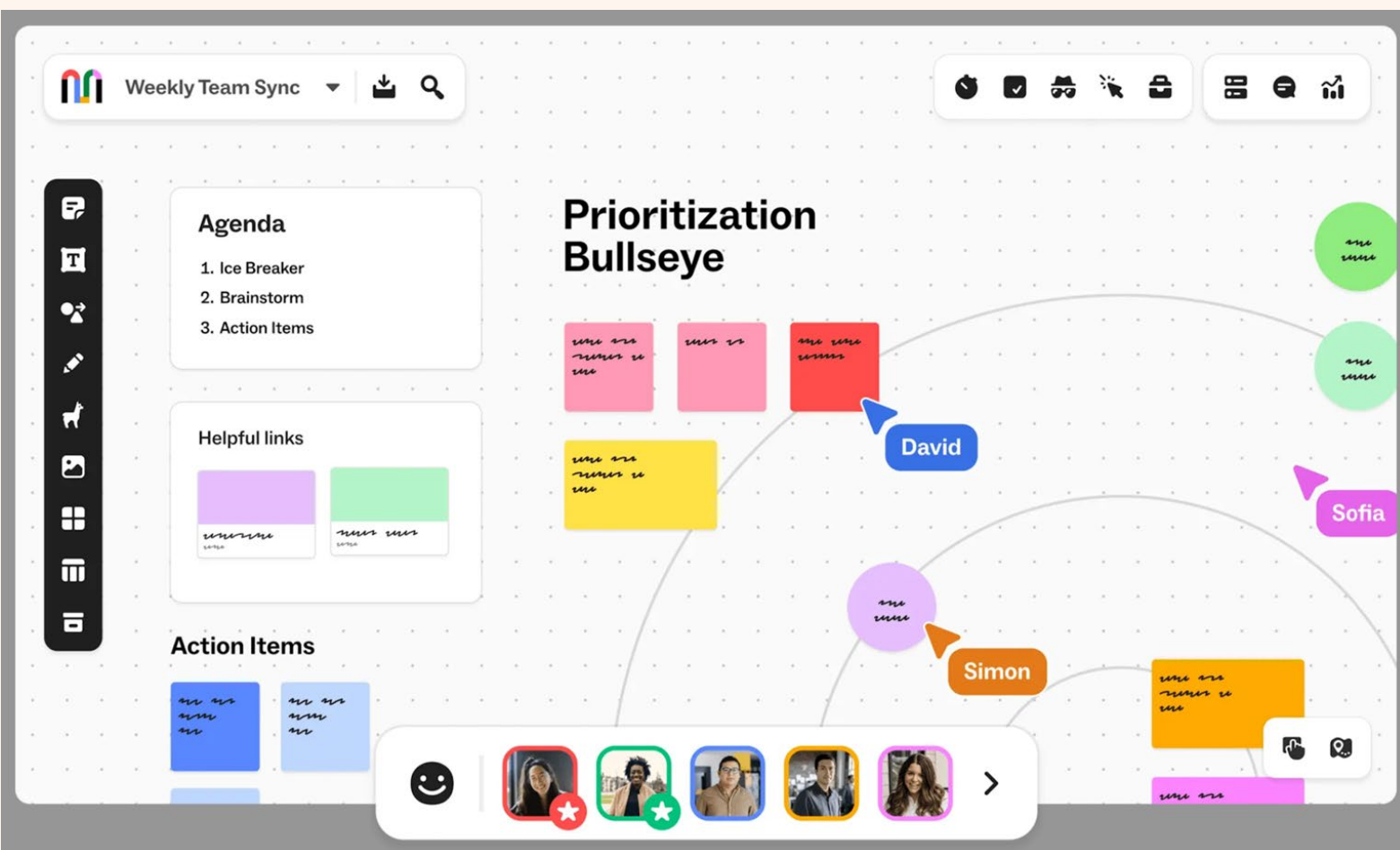
Preview event

See what the enriched event will look like.

```
1 {
2   "userId": "xxx",
3   "event": "Audience entered",
4   "properties": {
5     "email": "xxx",
6     // other profile properties will appear below
7     "audience_key": "active_account_owners",
8     "active_account_owners": true,
9     "active_account_owners_context": {
10      "accounts": [
11        {
12          "id": "xxx",
13          // other account properties will appear below
14          "carts": [
15            {
16              "id": "xxx",
17              // other cart properties will appear
18 below
19          "products": [
20            {
21              "id": "xxx",
22              // other product properties
23 will appear below
24            }
25          ]
26        }
27      ]
28    }
29  }
30 }
```

Customer Story Featuring Mural



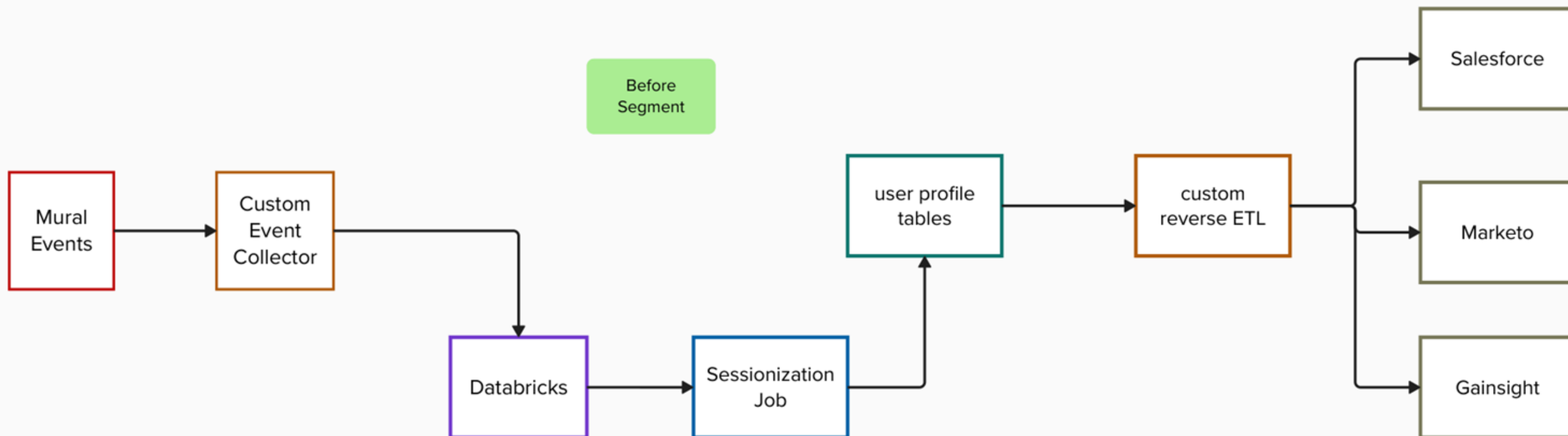


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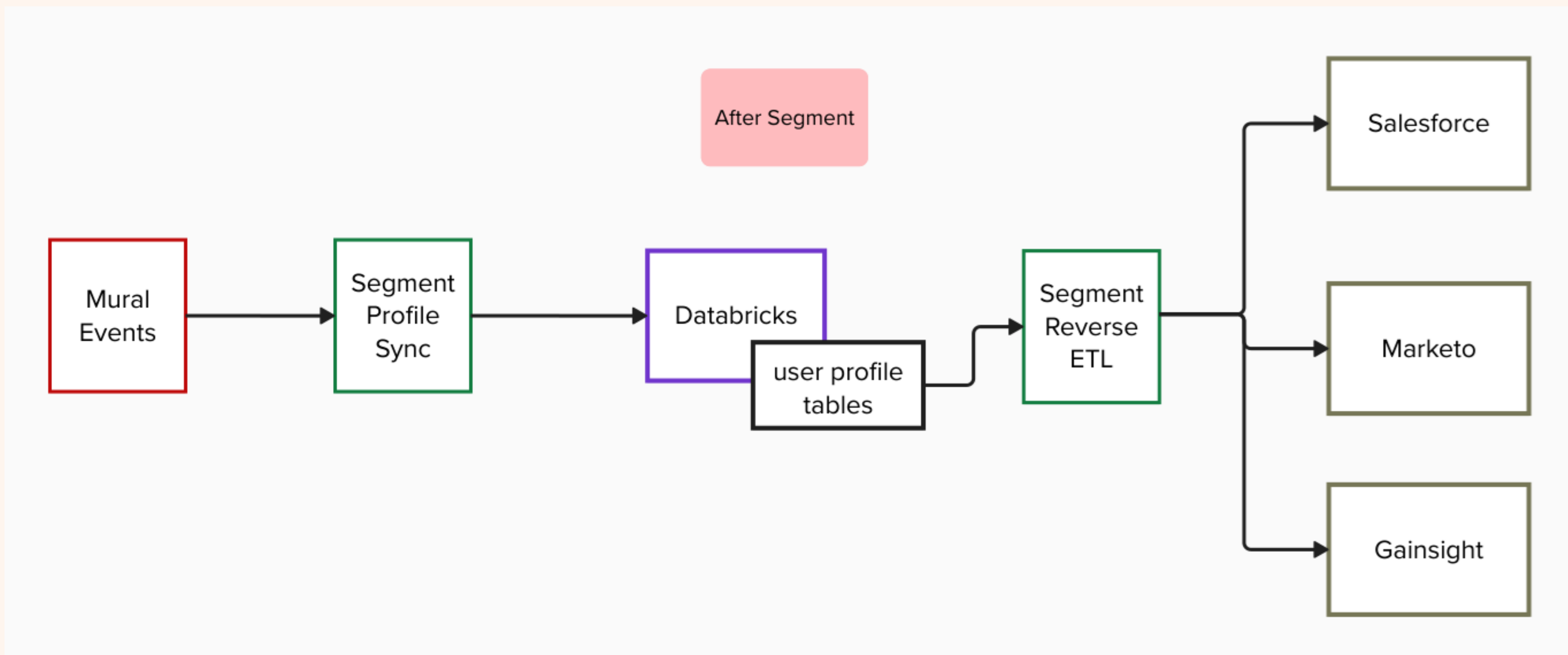


Mural data architecture at a glance... Before Segment



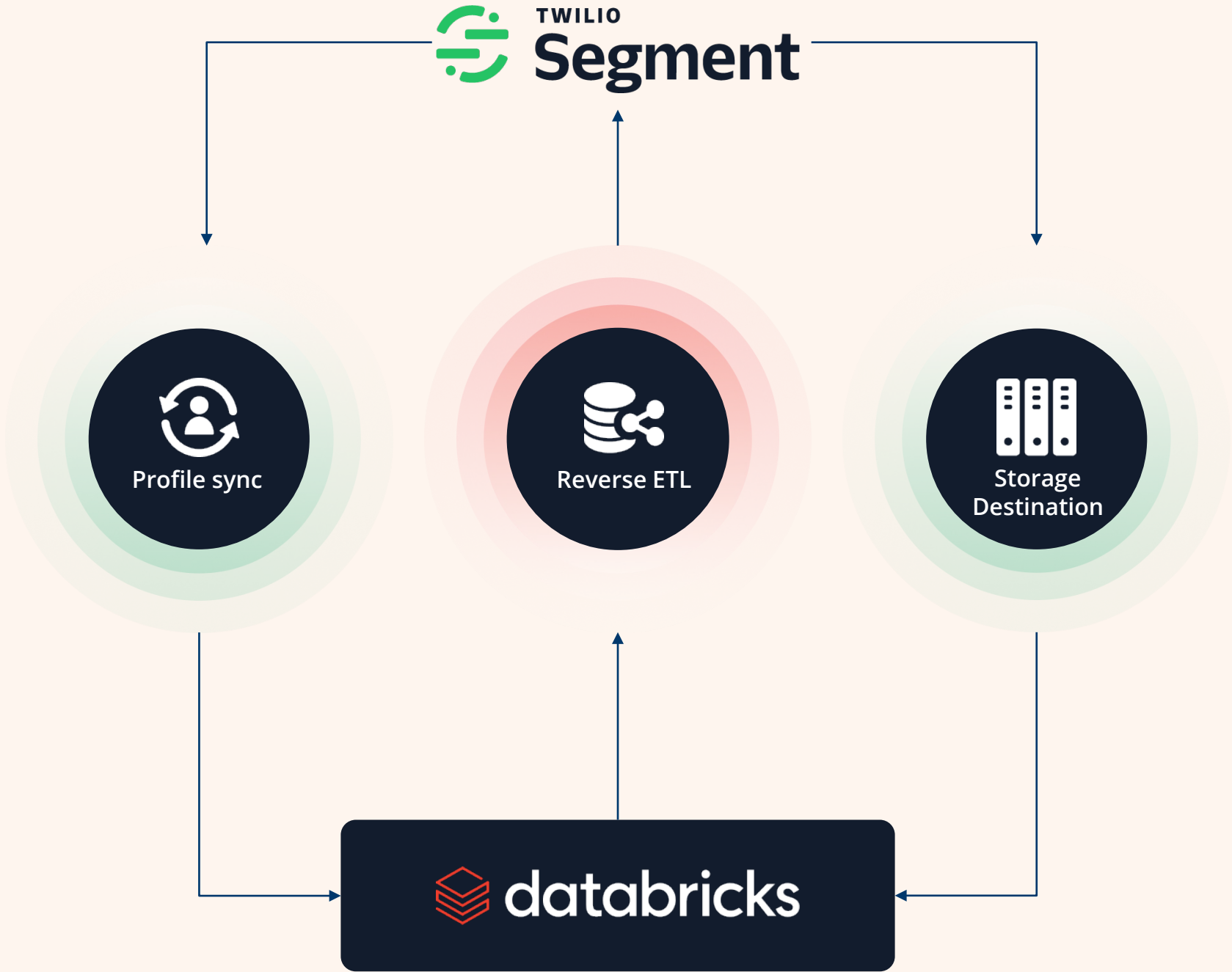


Mural data architecture at a glance... After Segment





Mural's warehouse-centric vision



How Mural integrates Twilio Segment across the organization



Product

Segment Profile Sync

- Audit Report
- User Milestone
- User Activity Summary

Sales

Segment Reverse ETL: Salesforce

- Company Statistics
- Activity Summary
- Churn Report

Marketing

Segment Connections

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

Segment Connections

- User Activity to Databricks
- Satismeter NPS score Integration

Segment Reverse ETL: Gainsight

- User Activity

Segment Reverse ETL: Marketo

- User Profile Segmentation

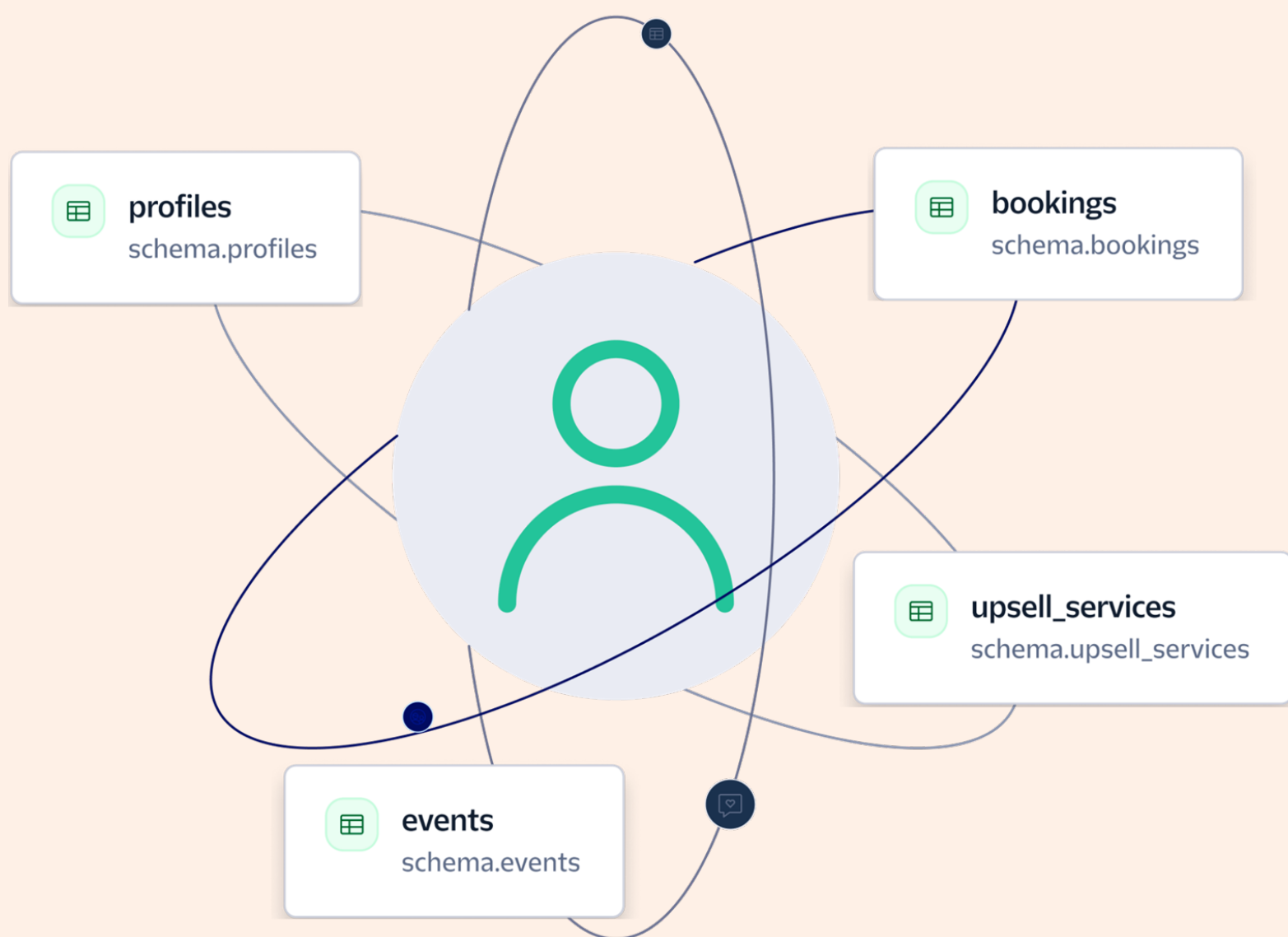
Linked Audiences





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

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



DAILY RAFFLE DRAWING

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



Thank You



Q&A



Appendix

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:



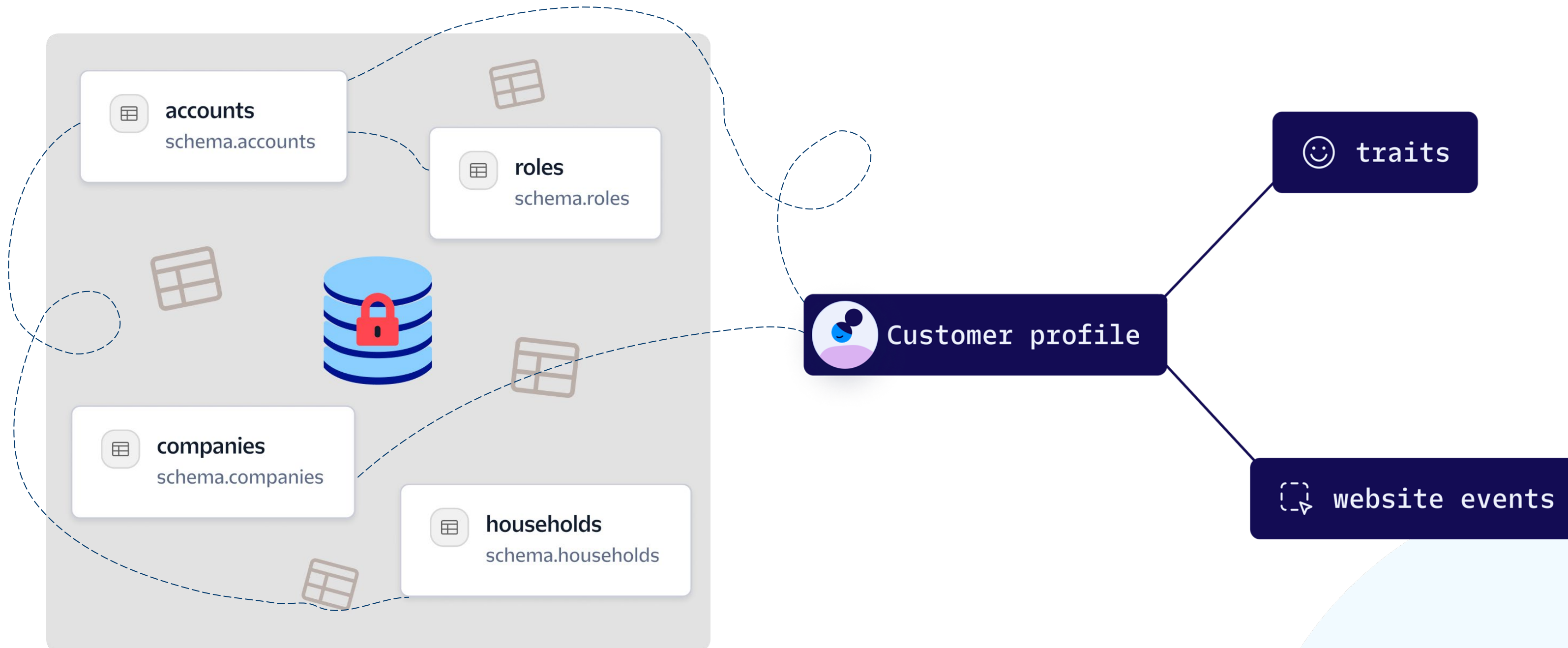
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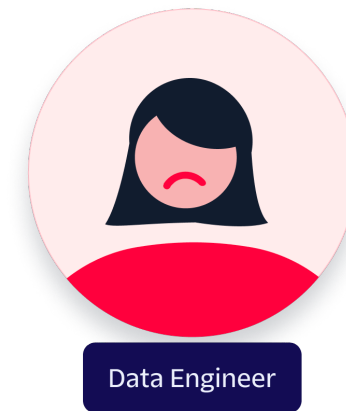
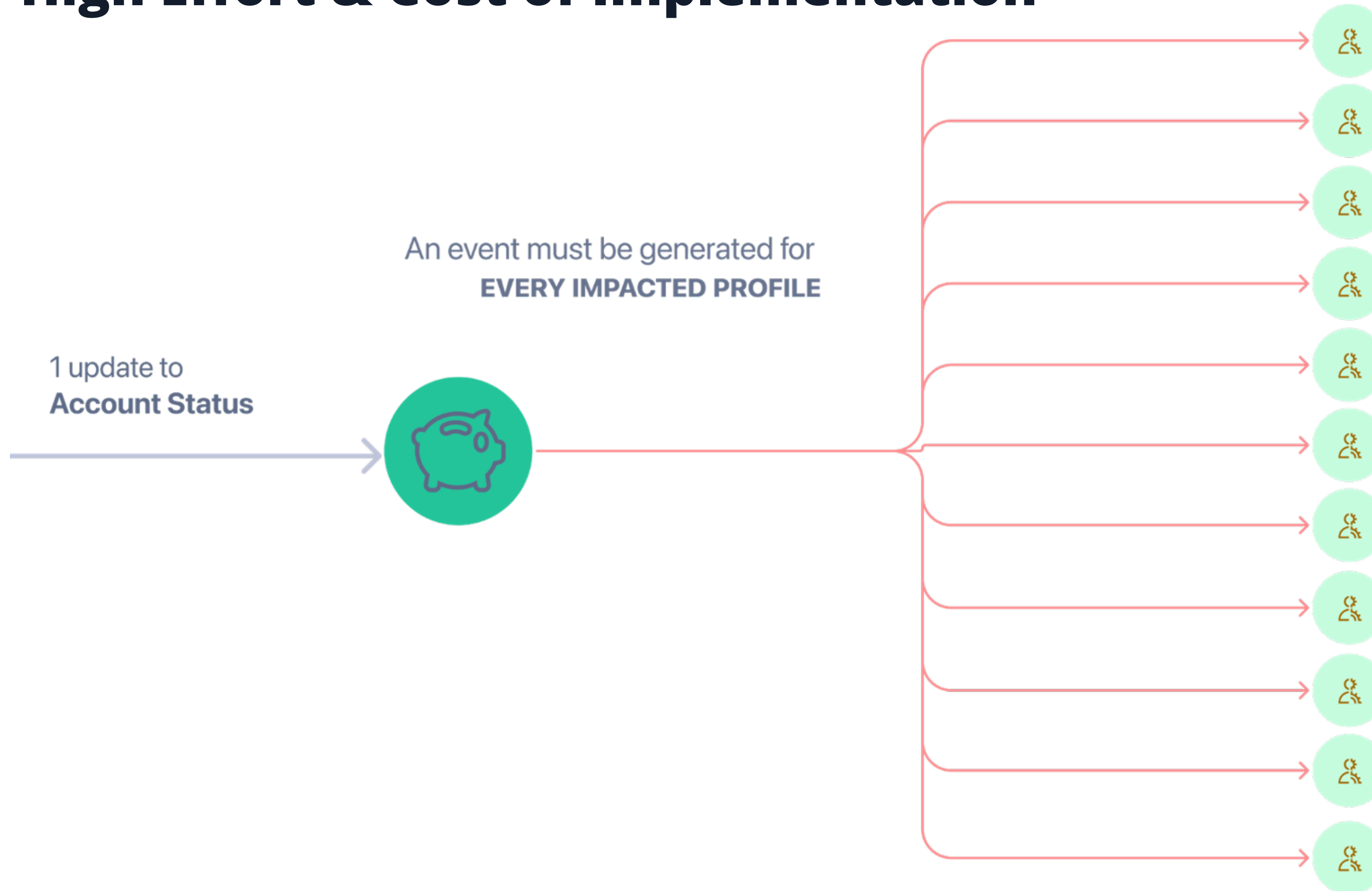
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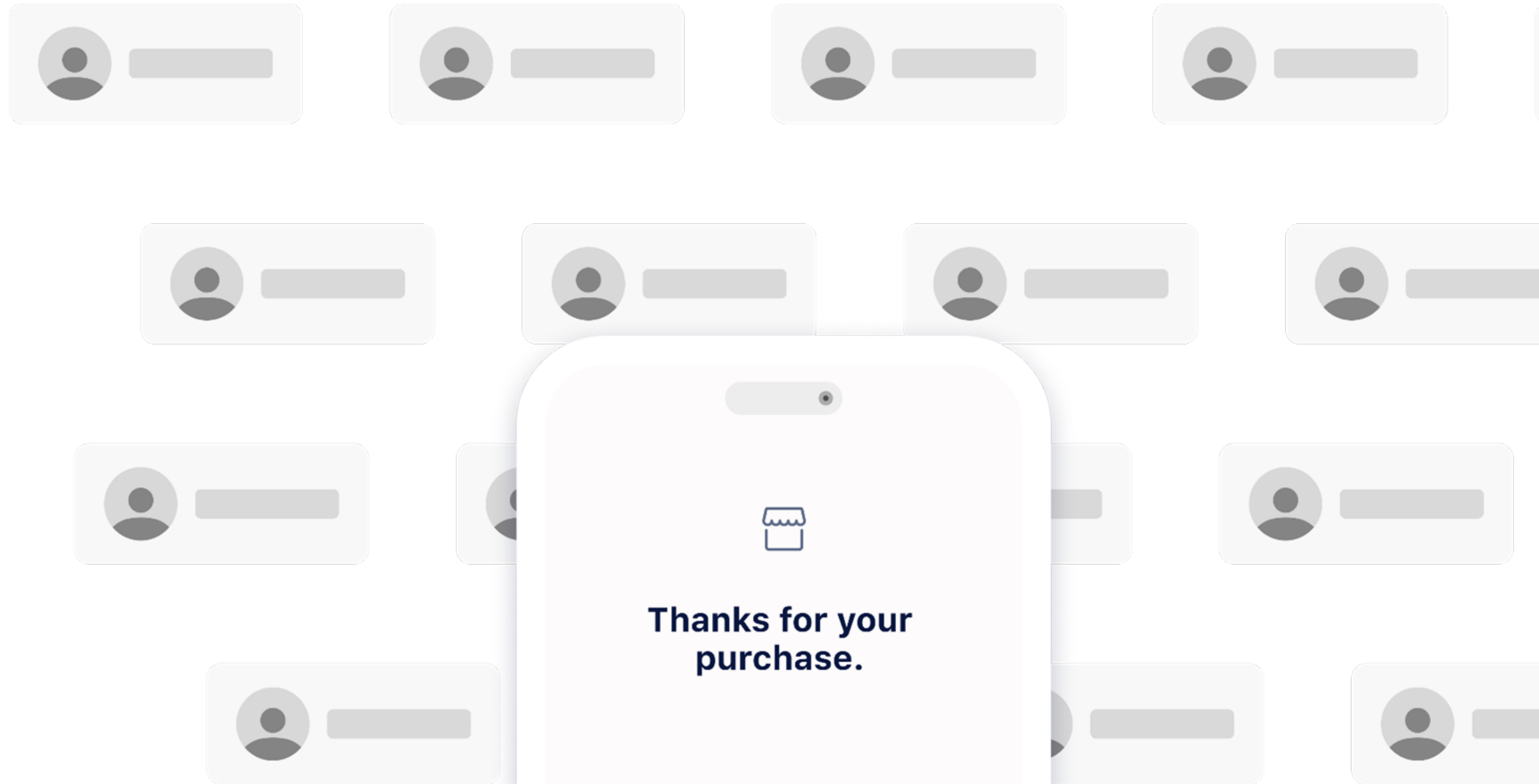
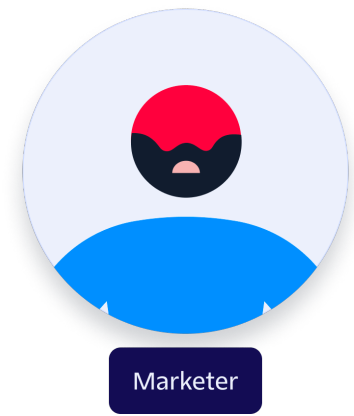
Before Linked Audiences: Relational Warehouse Data Unaccessible



Before Linked Audiences: High Effort & Cost of Implementation



Before Linked Audiences: Lack of Personalized Campaigns





Use Case Example #1: Financial Services



Owl Bank

To: Char

 Owl Bank

Hi Char,
Your account is overdue.

Open app

**Email reminder to pay off
overdue credit card**



Owl Bank
To: Char

 Owl Bank

Hi Char,

Your credit card is overdue.

Account Details

Account Number: ...1234

Credit Card: Owl Shopping Card

Balance: \$500

Due Date: 03/10/2024

Make Payment

Thanks for being a valued customer at NYC Owl Bank.

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

Linked Audience: Data Graph



Edit data graph Cancel

Define data graph [Config language documentation](#) << Preview Preview

```
1 data_graph {
2   version = "v0.0.4"
3
4   #define a profile entity
5   profile {
6     profile_folder = "segment"
7     type = segment
8
9     relationship "Accounts" {
10      related_entity = "account"
11      external_id {
12        type = "email"
13        join_key = "email_id"
14      }
15    }
16
17    #relate account to credit card
18    relationship "Credit Card" {
19      related_entity = "credit_card"
20      join_on = "account.id = credit_card.account_id"
21    }
22  }
23
24  #define account, credit card entities
25  entity "account" {
26    table_ref = "cust.account"
27    primary_key = "id"
28    enrichment_enabled = true
29  }
30 }
```

The preview shows a data graph with three entities: Profile (5 data consumers), Accounts (3 data consumers), and Credit cards (1 active data consumer). Arrows indicate relationships between Profile and Accounts, and Accounts and Credit cards.



Linked Audience: Builder

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

Create audience ✓ Select type 2 Build 3 Review & create Cancel

Select all profiles

associated with at least instance ×

and accounts are associated with at least instance ×

where equals ×

AND

Audience preview
- profiles

Add a condition to preview audience

Linked Audience: Activation



Add activation

Destination

Action

3 Eventization

4 Personalization

5 Map & test

6 Schedule

Cancel

Convert runs to events

Configure what kind of events are produced for each audience run. These events will trigger actions in Braze. [Learn more about converting to events](#)

Trigger 'Track event' for each:

Profile

Account

Credit card

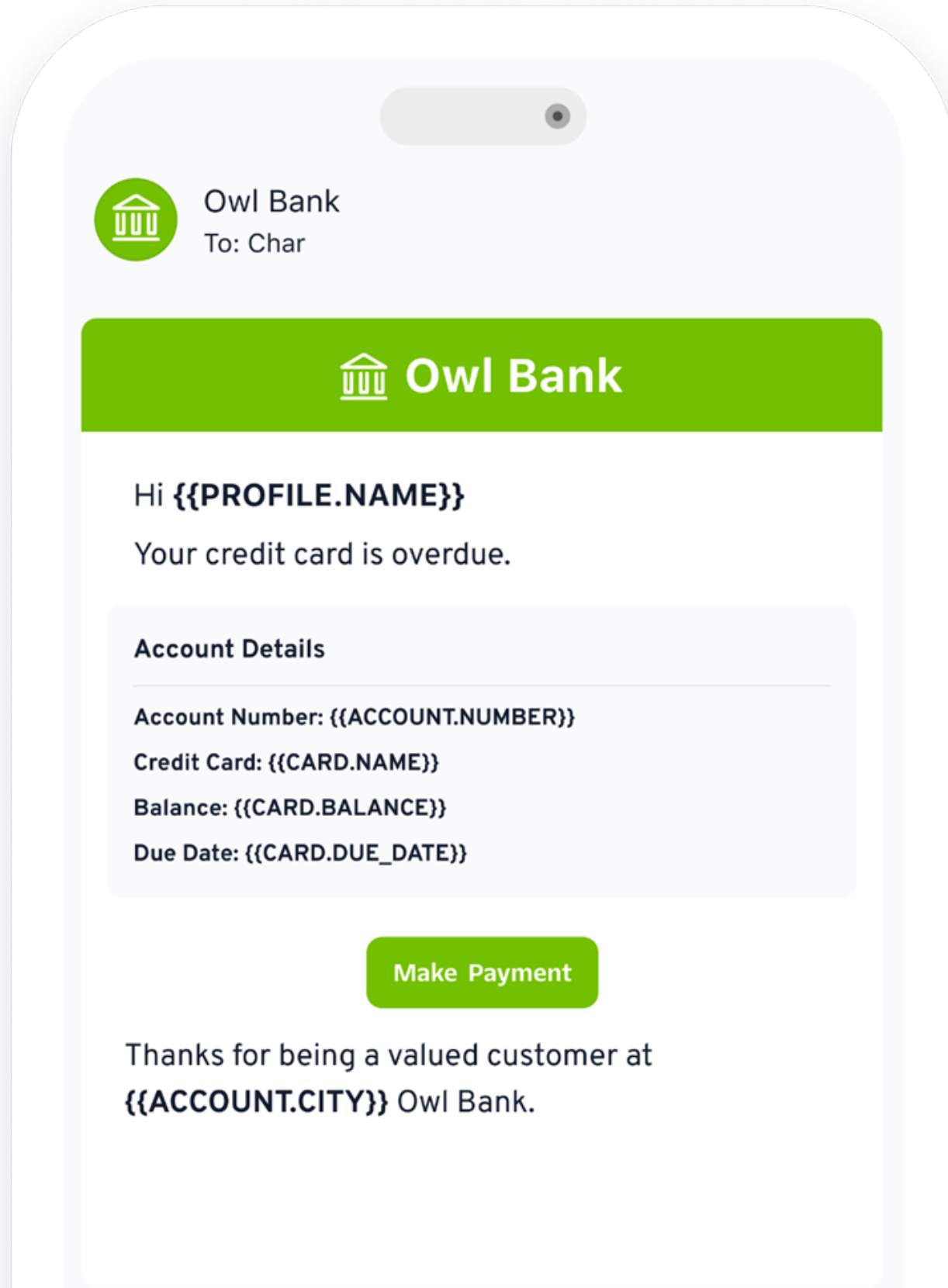
When:

+ 'Credit card' enters audience

- 'Credit card' exits audience

↻ 'Credit card' enters or exits audience

Linked Audience: Select Personalization Data



Add activation

Destination ✓ Action ✓ Eventization ✓ **4 Personalization** 5 Map & test 6 Schedule

Add personalization data

Select additional traits and properties to include when the event is sent.

Select properties to include

Profile properties	2 selected	-
SEGMENT_ID	<input checked="" type="checkbox"/>	
NAME	<input checked="" type="checkbox"/>	
EMAIL	<input type="checkbox"/>	
Account properties	4 selected	-
ID	<input checked="" type="checkbox"/>	
NAME	<input checked="" type="checkbox"/>	
CITY	<input checked="" type="checkbox"/>	
STATUS	<input checked="" type="checkbox"/>	
Credit Card properties	4 selected	-
ID	<input checked="" type="checkbox"/>	
NUMBER	<input checked="" type="checkbox"/>	
BALANCE	<input checked="" type="checkbox"/>	
DUE_DATE	<input checked="" type="checkbox"/>	

Preview event

See what the enriched event will look like.

```
1 {
2   "userId": "test-user-xxxx",
3   "event": "Audience entered",
4   "properties": {
5     "email": "xxx",
6     // other profile properties will appear below
7     "audience_key": "active_account_owners",
8     "active_account_owners": true,
9     "active_account_owners_context": {
10      "accounts": [
11        {
12          "id": "xxx",
13          // other account properties will appear below
14          "cards": [
15            {
16              "id": "xxx",
17              // other card properties will appear below
18            }
19          ]
20          "products": [
21            {
22              "id": "xxx",
23              // other product properties will appear below
24            }
25          ]
26        }
27      ]
28    }
29  }
30  ....
31  "last name": "value"
32  "phone number": "value"
33  ..
```



Use Case Example #2: SaaS Business



Twilio Segment

To: Char



Hi Char,

We've noticed your engagement levels have changed and are eager to understand how we can serve you better.

Schedule a brief call with your Customer Success Manager, Billy Owen, to dive into your experience. We'd love to discuss how Linked Audiences can better meet your warehouse activation needs!

Schedule Meeting

© 2024 Segment
101 Spear Street Floor 1, San Francisco, CA

[Manage your subscription preferences](#)

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



Linked Audience: Data Graph

Edit data graph Cancel

Define data graph [Config language documentation](#) << Preview

```
1 data_graph {
2   version = "v0.0.4"
3
4   #define a profile entity
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6     profile_folder = "segment"
7     type = segment
8
9     relationship "Accounts" {
10      related_entity = "account"
11      external_id {
12        type = "email"
13        join_key = "email_id"
14      }
15    }
16
17    #relate account to credit card
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19      related_entity = "credit_card"
20      join_on = "account.id = credit_card.account_id"
21    }
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23
24  #define account, credit card entities
25  entity "account" {
26    table_ref = "cust.account"
27    primary_key = "id"
28    enrichment_enabled = true
29  }
30 }
```

```
graph LR
  Profile[Profile  
5 data consumers] --> WorkspaceRole[Workspace role  
Role  
2 data consumers]
  WorkspaceRole --> Workspace[Workspace  
1 active data consumer]
  WorkspaceRole --> Account[Account  
Accounts  
1 active data consumer]
```



Linked Audience: Builder

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

New Audience ✓ Select Type 2 Build 3 Review & Create Cancel

Select all profiles

associated with at least instance ×

where **all** of the following are true

greater than ×

AND

within next days ×

AND

less than or equal ×

Audience preview

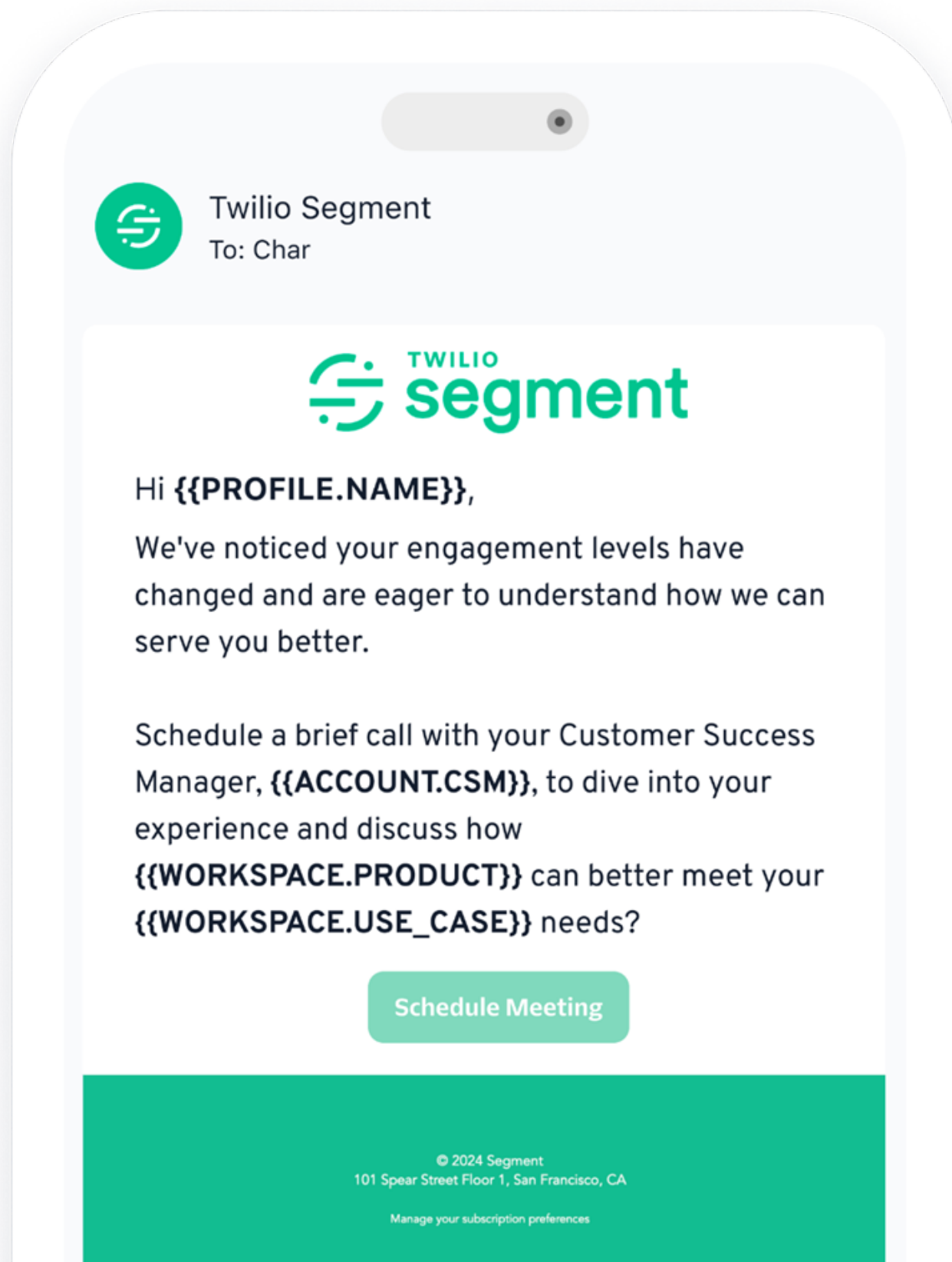
- profiles

Fill in all your conditions to preview audience

Preview



Linked Audience: Activate & Personalize



Add activation

Destination ✓ Action ✓ Eventization ✓ **4 Personalization** 5 Map & test 6 Schedule

Add personalization data

Select additional traits and properties to include when the event is sent.

Select properties to include

Profile properties	2 selected	[-]
SEGMENT_ID	<input checked="" type="checkbox"/>	
FIRST_NAME	<input checked="" type="checkbox"/>	
EMAIL	<input type="checkbox"/>	
Workspace properties	4 selected	[-]
ID	<input checked="" type="checkbox"/>	
PRODUCT	<input checked="" type="checkbox"/>	
USE_CASE	<input checked="" type="checkbox"/>	
STATUS	<input checked="" type="checkbox"/>	
Account properties	4 selected	[-]
ID	<input checked="" type="checkbox"/>	
CSM	<input checked="" type="checkbox"/>	
ARR	<input checked="" type="checkbox"/>	
RENEWAL_DATE	<input checked="" type="checkbox"/>	

Preview event

See what the enriched event will look like.

```
1 {
2   "userId": "test-user-xxxx",
3   "event": "Audience entered",
4   "properties": {
5     "email": "xxx",
6     // other profile properties will appear below
7     "audience_key": "active_account_owners",
8     "active_account_owners": true,
9     "active_account_owners_context": {
10      "accounts": [
11        {
12          "id": "xxx",
13          // other account properties will appear below
14          "carts": [
15            {
16              "id": "xxx",
17              // other cart properties will appear below
18            }
19          ],
20          "products": [
21            {
22              "id": "xxx",
23              // other product properties will appear below
24            }
25          ]
26        }
27      ],
28    }
29  },
30  ....
31  "last name": "value"
32  "phone number": "value"
33  .....
```

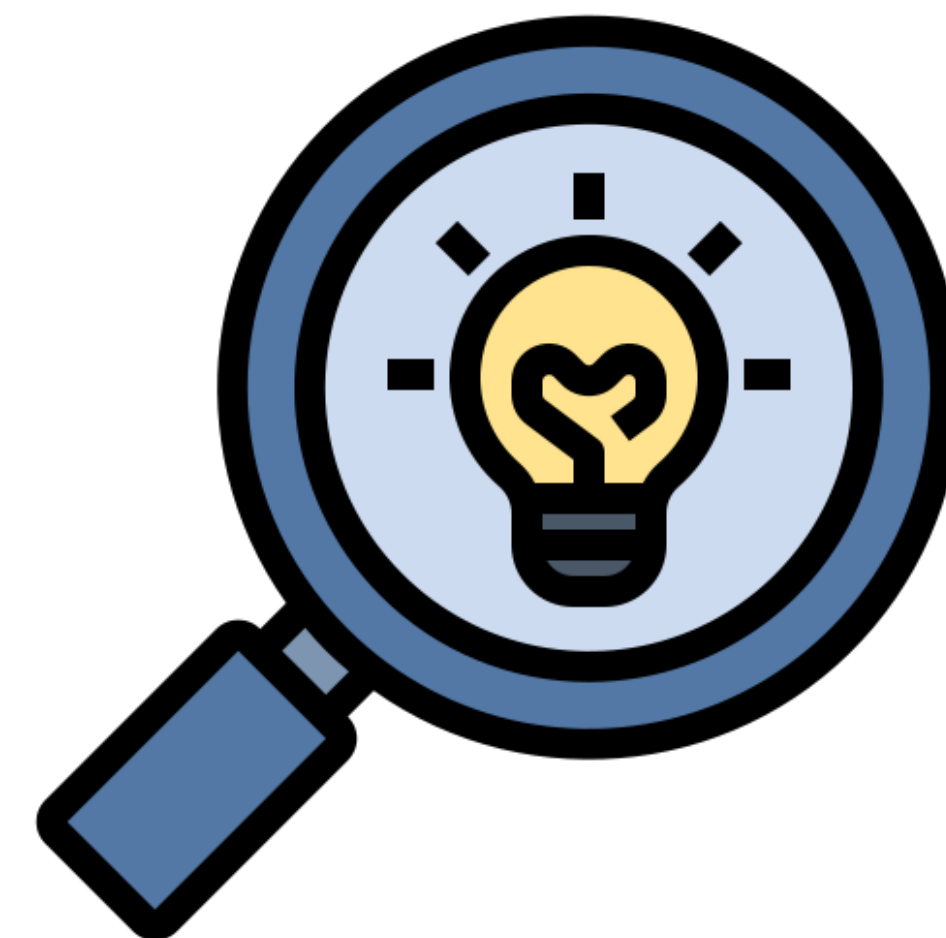
Use Case Discovery & Qualification





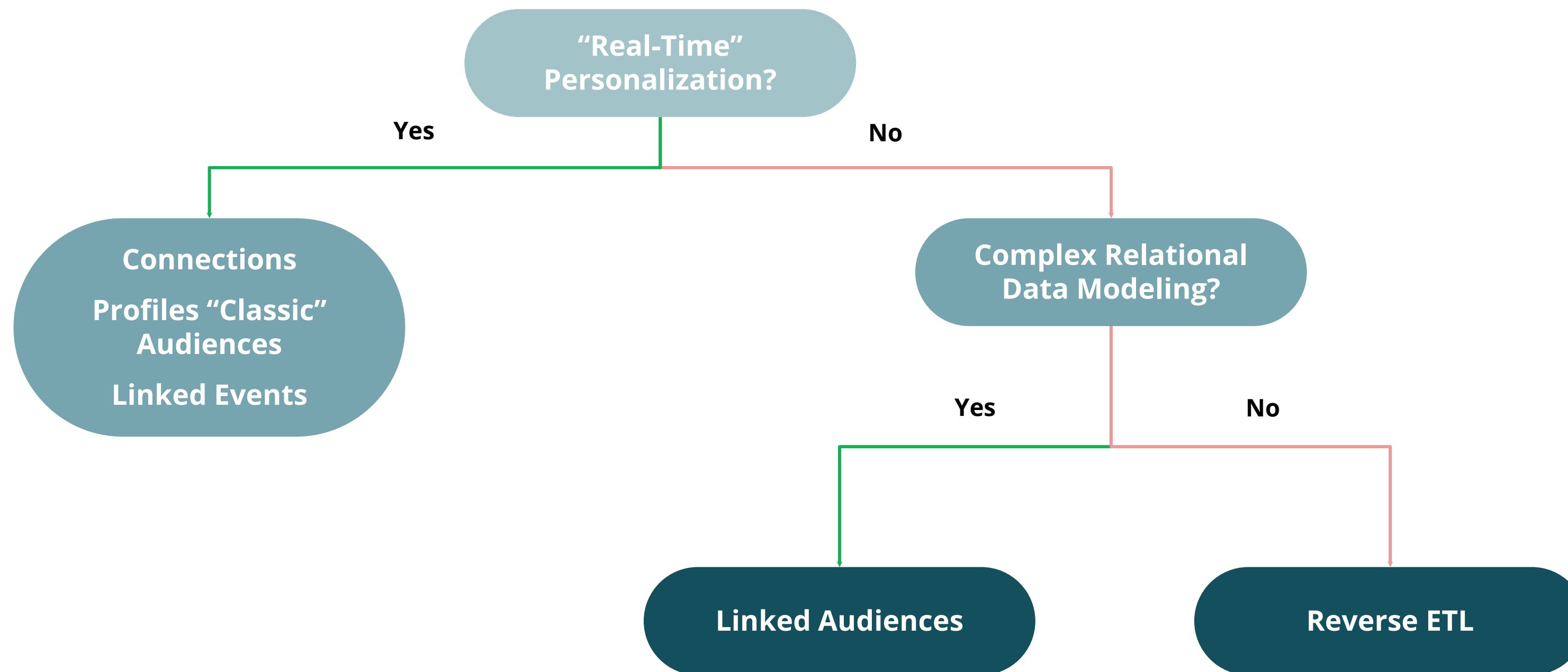
Linked Audiences: 5 Discovery Questions

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?
 - o 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?



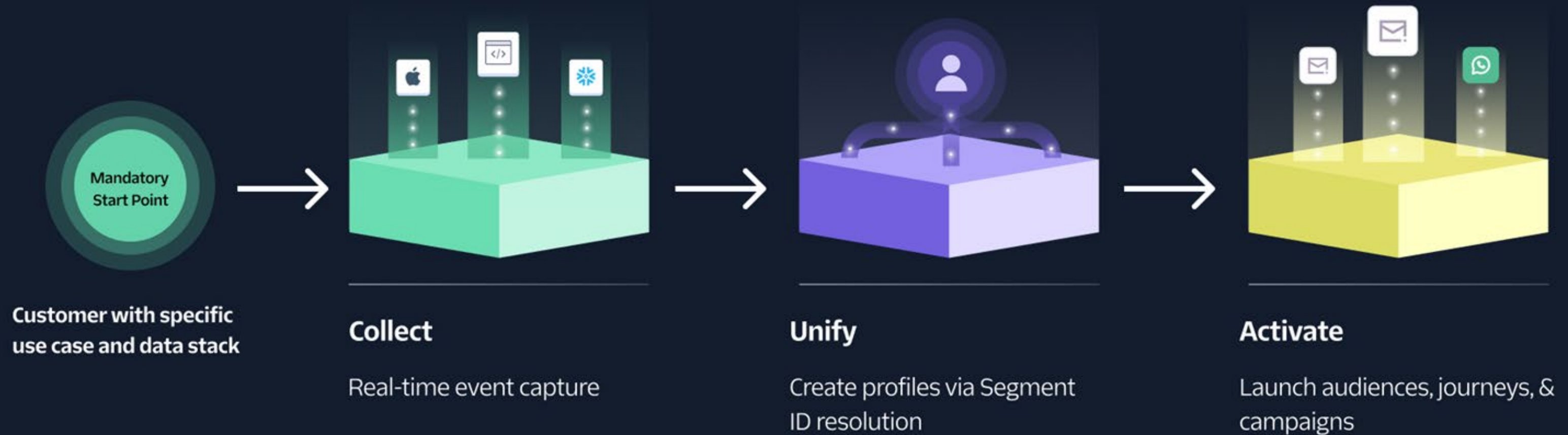


Linked Audiences: Use Case Discovery Tree



Segment before

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





**Data warehouses
are now a key piece
of CDP data
architecture**



Google
BigQuery



amazon
REDSHIFT



databricks



1 Trillion

Rows synced per month

2.5 Billion

Events per second

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