

For Marketers

Personalization Playbook

AI-powered use cases for
omnichannel engagement

Second Edition

SAP



Big Ideas, Real Results, Zero Fluff

Personalization today can feel like a never-ending sprint. Just when you think you've cracked the code to engage your customers, their expectations shift. Today, AI agents are driving product discovery and making buying decisions, and brands that struggle to act in real time risk losing ground. Marketers everywhere are navigating a rapidly changing landscape, but **78% of brands can't actually practice real-time AI optimization in day-to-day campaigns** ([Global Engagement Index, 2026](#)).

Marketers need results that don't just look good on a dashboard but truly drive business outcomes.

A Leader in Personalization Engines according to the Gartner® Magic Quadrant™ 7 times in a row

Get the report

That's where our Personalization Playbook for Marketers comes in.

We've designed it to be as actionable as it is inspiring, leveraging real scenarios from our most successful customers. Think of it as your partner in tackling day-to-day challenges, offering you fresh ideas and clear, step-by-step advice to implement them.

Need to build a campaign that re-engages dormant customers? It's in here. Trying to create an AI-powered omnichannel experience that feels effortless for your customers? We have you covered.

This Playbook shows how to take an idea, turn it into a strategy, and bring it to life.



Michael Jonas, Chief Customer Success Officer, SAP

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Find your play by business challenge:

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Beginner

A use case that is ideal for marketers who understand the fundamentals and leverage entry-level marketing automation channels like email.

Advanced

A use case that is ideal for marketers with expertise in strategic multichannel execution of marketing automations using data-driven insights.

Expert

A use case that is ideal for marketers who have mastered connected, omnichannel campaigns and innovate with new trending channels and tactics.

Find your play by use case:

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Grow Your Database



Beginner




Encourage unsubscribed customers to resubscribe

Use Case:

During peak sales seasons, take advantage of the heavy traffic of customers both new and old by encouraging them to opt in to your email campaign and maximize your first-party data.

[Retail](#) | [E-Commerce](#) | [Consumer Products](#) | [Sports & Entertainment](#)

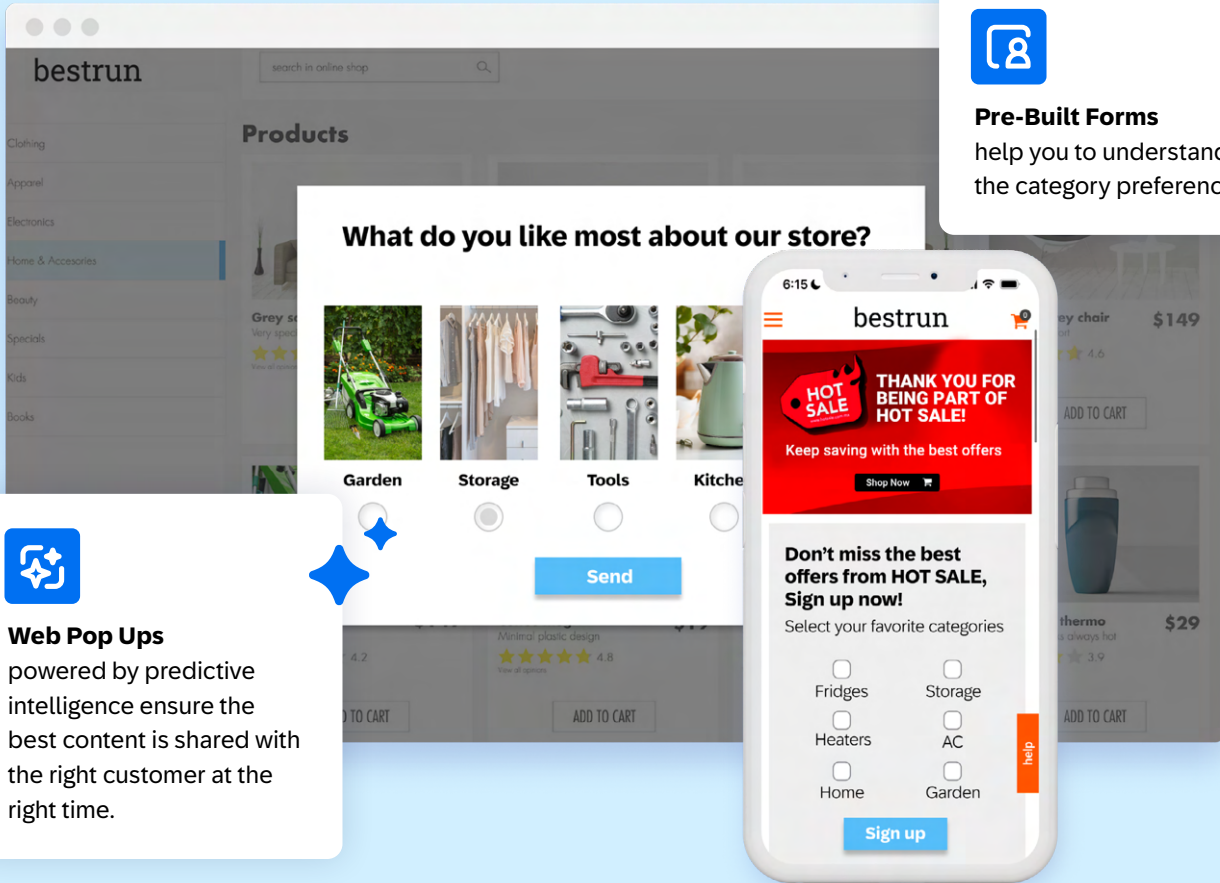
What to measure:

-  Active customer base
-  Email re-opt-in
-  Revenue generated from email re-opt-in

“On the landing page for the Hot Sales season, we ask [customers] through a sign-up form, what category are you interested in? And then we store that in a database, and we send that information through an automation on the first day of the event.”



Mauricio Gonzalez, Online Experience Manager, The Home Depot



Pre-Built Forms

help you to understand the category preference.



Web Pop Ups

powered by predictive intelligence ensure the best content is shared with the right customer at the right time.

Beginner

Encourage unsubscribed customers to resubscribe

Channels Included

- Web Channel
- Email

Solution

- Target customers in your database who are currently opted out or are unidentified. These are potential high-value customers.
- Create a web channel form pop up, asking customers to re-opt in, showcasing the value they'll receive, including data transparency.
- Remember: set the value node used to update the opt-in field to True.
- Automate a follow-up email with personalized product recommendations and content based on their preferences.

Optional Resources

- **SAP CX Service Offerings:** Strategic guidance on landing page design, concept and creation of website overlays and in-app messaging, campaign personalization and ESL (Emarsys Scripting Language), use case and automation creation



Engagement Cloud

Encourage unsubscribed customers to resubscribe

Status: In Design Save

Nodes

Search

Entry Points

- Data Change
- Form
- New Contact
- Target Segment
- On Auto Import
- Recurring Filter

Info Collect Form → Form Autoreponse

Trigger the automation with a **customized form to collect helpful information about your customers with a web pop up.**

Once the form is completed, send a **personalized email with content relevant to each subscriber.**

Use **Send Time Optimization to deliver a personalized follow up email at the time it's most likely to be opened.**

Advanced




Create an omnichannel progressive profiling opt-in experience

Use Case:

Gather data in stages rather than overwhelm prospective customers with lengthy forms. Build detailed customer profiles to further enrich them with real-time business context, enabling adaptive customer experiences.

[Retail](#) | [E-Commerce](#) | [Consumer Products](#) | [Sports & Entertainment](#)

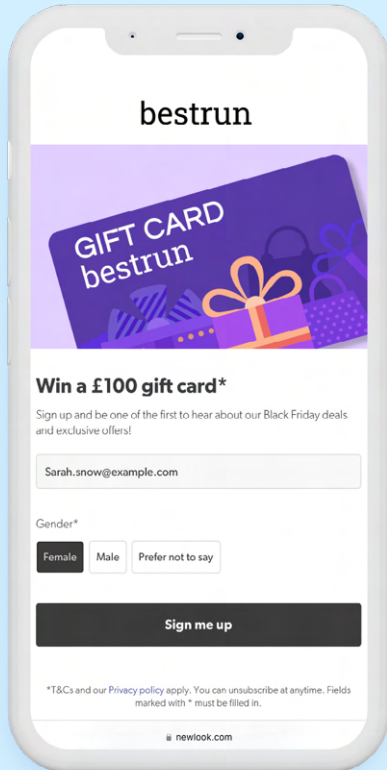
What to measure:

-  First purchase
-  Customer churn
-  Active customer revenue

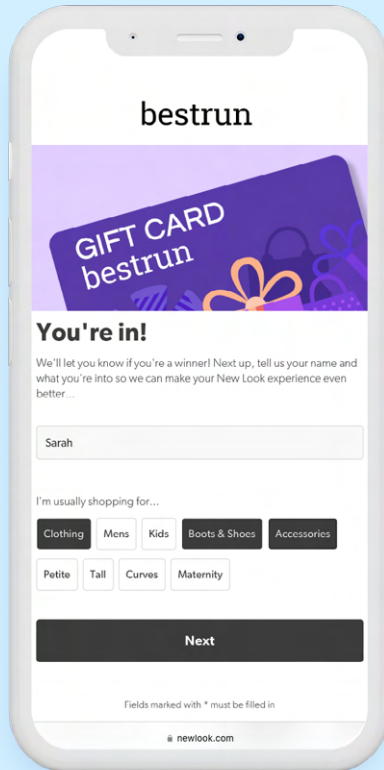
“SAP Engagement Cloud has really become the center of how we orchestrate the conversation with our customers to deliver a more rewarding customer experience. And what's most important is we have a deep level of understanding of our customer than ever before. We're using the interactions that the customer has with our brand and using the products that they show interest in to drive a conversation with them.”



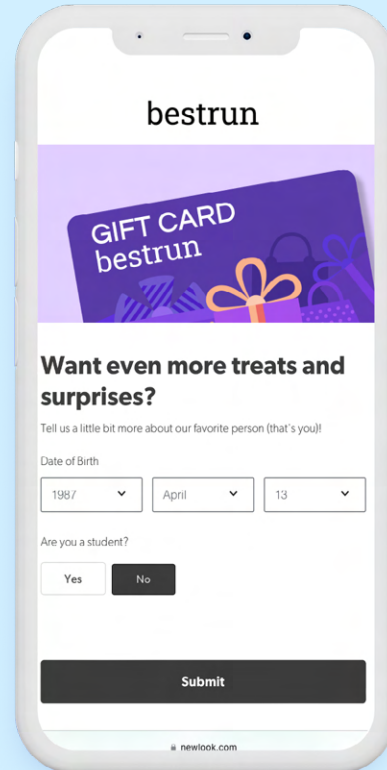
Ellise Jones, Group Head of Loyalty, Total Tools



Capture the essentials



Understand the customer



Enrich their experience

Advanced

Create an omnichannel progressive profiling opt-in experience

Channels Included

- Web Channel
- Email
- Digital ads

Solution

- Entry node is a purchase made that triggers an email follow up, digital ad, and web channel message asking about category preferences.
- After a week, an automation triggers across channels, asking questions to capture interest.
- Use email and web channel to capture SMS opt-in to help reach on-the-go customers.
- Enable digital ads to dynamically adapt in real time with Google BigQuery and AI leveraging live ERP signals to align with audience intent and regional context.

Optional Resources

- **SAP CX Service Offerings:** Collaborative strategic guidance for profiling use cases, design and build omnichannel forms and template blocks, technical guidance on external APIs and Relational Data requirements, personalization, and ESL



The image shows a screenshot of the SAP Engagement Cloud interface. The main window displays a marketing automation flowchart with various nodes and actions. The flowchart starts with a 'Purchase' event, followed by a 'Participation Check' node. It then branches into several paths involving 'Send Email', 'Send Progressive', 'Send Digital Ad', and 'Remove Program' actions, with decision points for 'Opt-in Status' and 'Digital Ad - User Opt-in Status'. The interface includes a sidebar with navigation icons and a 'Nodes' section with a search bar. Below the 'Nodes' section, there is a list of actions: A/B Test, Decision, Decision Splitter, Double Opt-in, Participation Check, and Segment.

Generate on-brand channel content in seconds with Content Assistant.

Use **personalized digital ads** to encourage engagement.

Create a participation check to make sure you have the best target audience to deliver a progressive profile opt-in experience.

Turn a **simple description into a precise, ready-to-use** audience with Audience Identification Agent.

Advanced




Turn unidentified visitors into lead conversions, faster

Use Case:

Encourage unidentified website visitors to provide their emails so marketing can target these leads more efficiently and sales reps can quickly follow up.

[Services](#) | [Consumer Products](#)

What to measure:

-  Click rate
-  Contact form sign ups
-  Conversion

“With all the data that we curate on our customers' activities, and providing that data to the field, it's very important that we have the systems that scale up efficiently. In order to deliver to our customers accurately and on time every day, we needed an integrated platform, and that is why we chose SAP.”



Matt Hough, Chief Information Officer, Cintas

The image displays a website for 'bestrun' with a navigation menu (Solutions, Industries, About, Contact us, Search) and a 'Signed in' button. A large banner features the text 'ELEVATE YOUR WORKDAY. RELY ON IT.' and 'Your Business. Your Experience' over a background of paint cans and brushes. A contact form is overlaid on the banner, asking for 'Name' and 'Surname' with a 'SUBMIT' button. A call-to-action box in the bottom left contains a blue icon of a document with a plus sign and the text: 'Connect your **Contact Us** form with a **Welcome Automation** to shorten the sales response time.' An arrow points from this box to a 'Welcome Automation' message box on the right. This message box shows a user's account details: 'Account #432455', 'Welcome to BESTRUN', and a personalized message: 'Welcome **name** ! My name is John Doe and I'm here to support you for all your purchasing needs. Please find your my BestRun portal login details below.'

Advanced

Turn unidentified visitors into lead conversions, faster

Channels Included

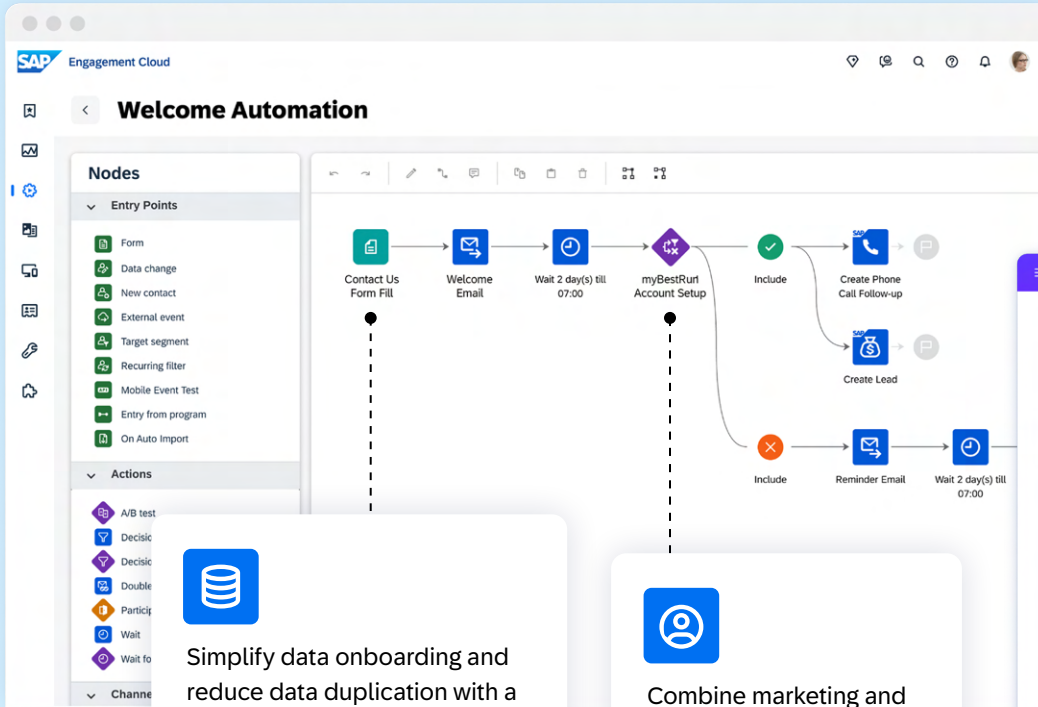
- Web Channel
- Email
- Digital ads


Solution

- Target unidentified visitors with web channel overlays to capture emails.
- Trigger an automated Welcome campaign upon form submission for immediate follow-up.
- Segment leads based on form fill information and website behavior and start building a holistic view of the prospect.
- Trigger a sales call follow up to further support the customer in their purchase.
- Personalize digital ads to redirect leads to content that's relevant to their interests.

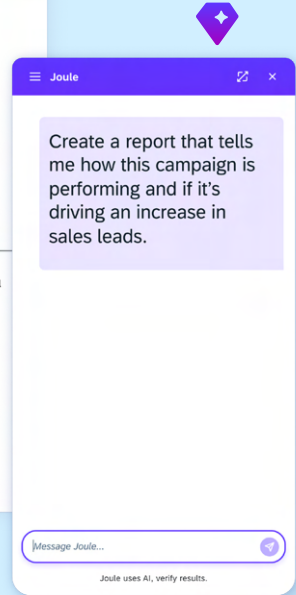
Optional Resources

- **SAP CX Service Offerings:** Strategic collaboration to design and build Welcome automation and omnichannel campaigns, website overlay design and creation, segmentation guidance




Simplify data onboarding and reduce data duplication with a **relational database** model for seamless triggered automations.


Combine marketing and sales to **personalize the journey in real time** and convert leads faster.





Drive Customer Engagement



Advanced




Launch a new product or offering

Use Case:

Introduce a new product to existing customers to generate excitement about the brand and the new product with a focus on meeting customers on their channel of choice.

[Retail](#) | [E-Commerce](#) | [Consumer Products](#) |
[Sports & Entertainment](#)

What to measure:

-  Conversion & retention
-  Product adoption
-  Audience growth

“For lifecycle marketing, we wanted to provide personalized experiences for increased conversion rate, develop segmentation strategies for improved retention and conversion, implement automation triggers to nurture current and future customers, and educate our existing audience and identify customer needs for this new product line.”



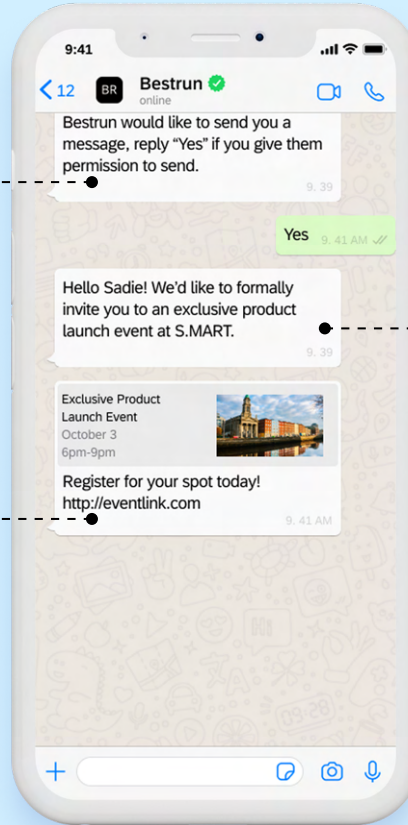
Lyla Holt, Global Digital Marketing Manager, Consumer Care, John Frieda



AI-powered segmentation allows you to target your highest-value segments by identifying overlap in customer affinity for similar products.



Automate **WhatsApp messages** to deliver personalized experiences.



Capture consent and unlock a new revenue channel to engage your customers.

Advanced

Launch a new product or offering

Channels Included

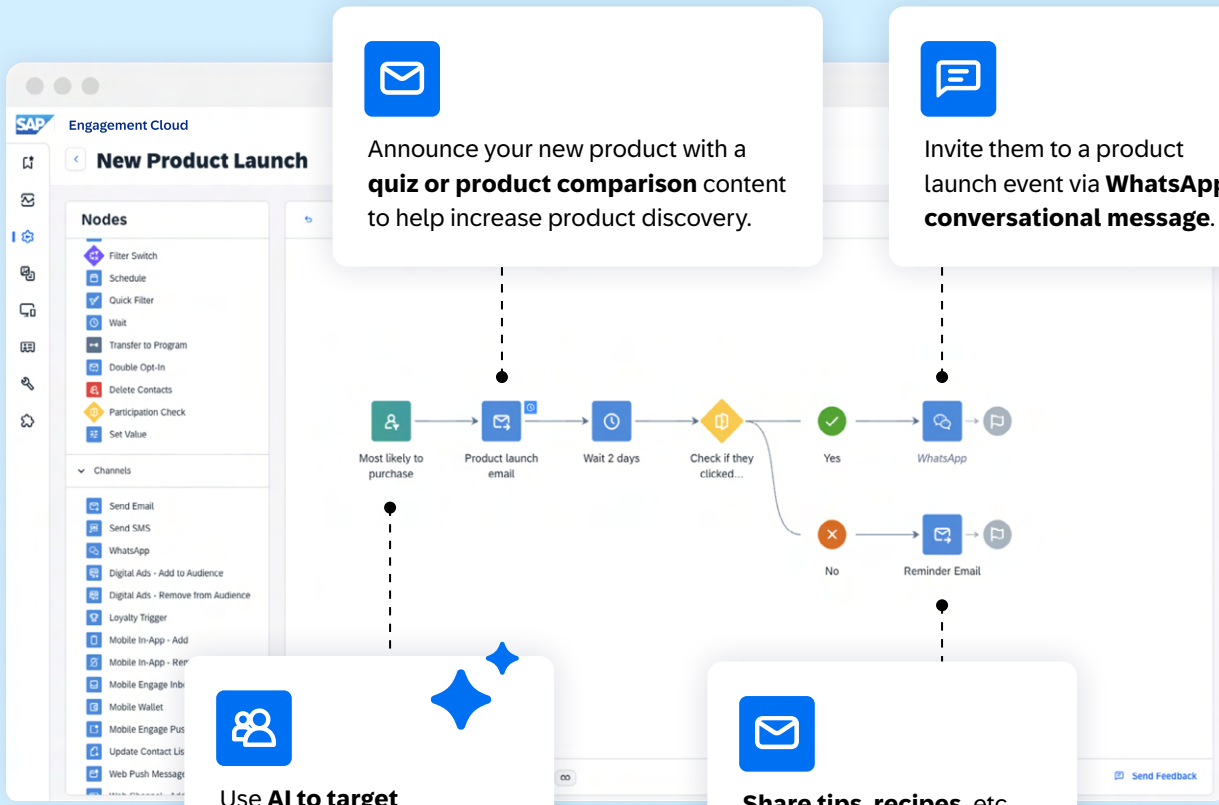
- Email
- Conversational Channels

Solution

- Use AI to create a target audience segment that would be most interested in your new offering.
- Leverage AI-driven channel engagement scoring to target segments most likely to engage on a given channel so you can optimize spend and ROI.
- Create Personalization Tokens and Content Blocks that you can reuse across channels and campaigns.
- Include Send Time Optimization to deliver messages at the right moment.

Optional Resources

- **SAP CX Service Offerings:** Strategic segmentation guidance, creative design and build, personalization, and ESL



Announce your new product with a **quiz or product comparison** content to help increase product discovery.



Invite them to a product launch event via **WhatsApp conversational message**.



Use **AI** to target audiences with similar product interests.



Share **tips, recipes, etc.** for the newly launched product.




Advanced

Deliver time-sensitive messages when a product is back in stock

Use Case:

Inform customers about popular products, tickets, and offerings that are back in stock, drive immediate sales, and increase customer engagement. Take advantage of channels like SMS that can meet your on-the-go customers in the moments that matter most.

What to measure:

-  SMS click rate
-  Product adoption
-  SMS opt-ins

[Retail](#) | [E-Commerce](#) | [Consumer Products](#)

“When you move from a 16-digit number in an ERP to a named individual with behavioral attributes and all the history behind their digital touchpoints for how they’ve interacted with you and how you’ve communicated with them, then you can start to build a true individual-centric profile.”

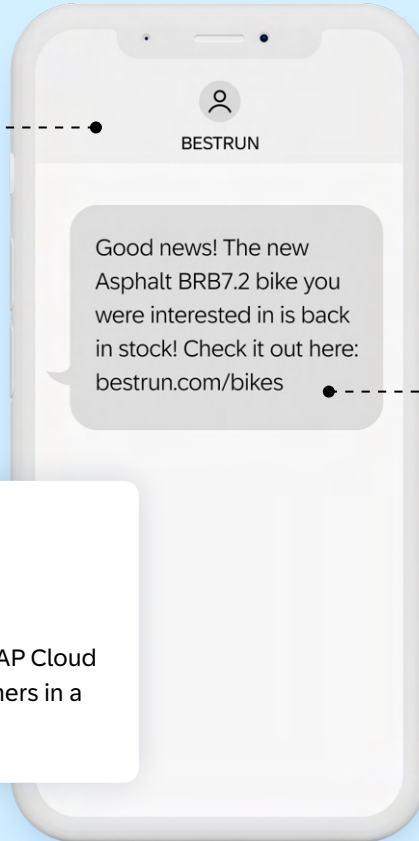


Aaron Bradley, Vice President, Technology & GTM Innovation, Wella Company



Capture consent

and unlock a new revenue channel to engage your customers.



Personalize your SMS message

by including the name of the back-in-stock product as well as a direct link to explore.



Connect customer and operational data

with SAP Cloud ERP to reach your customers in a more meaningful way.

Advanced

Deliver time-sensitive messages when a product is back in stock

Channels Included

- Email
- SMS

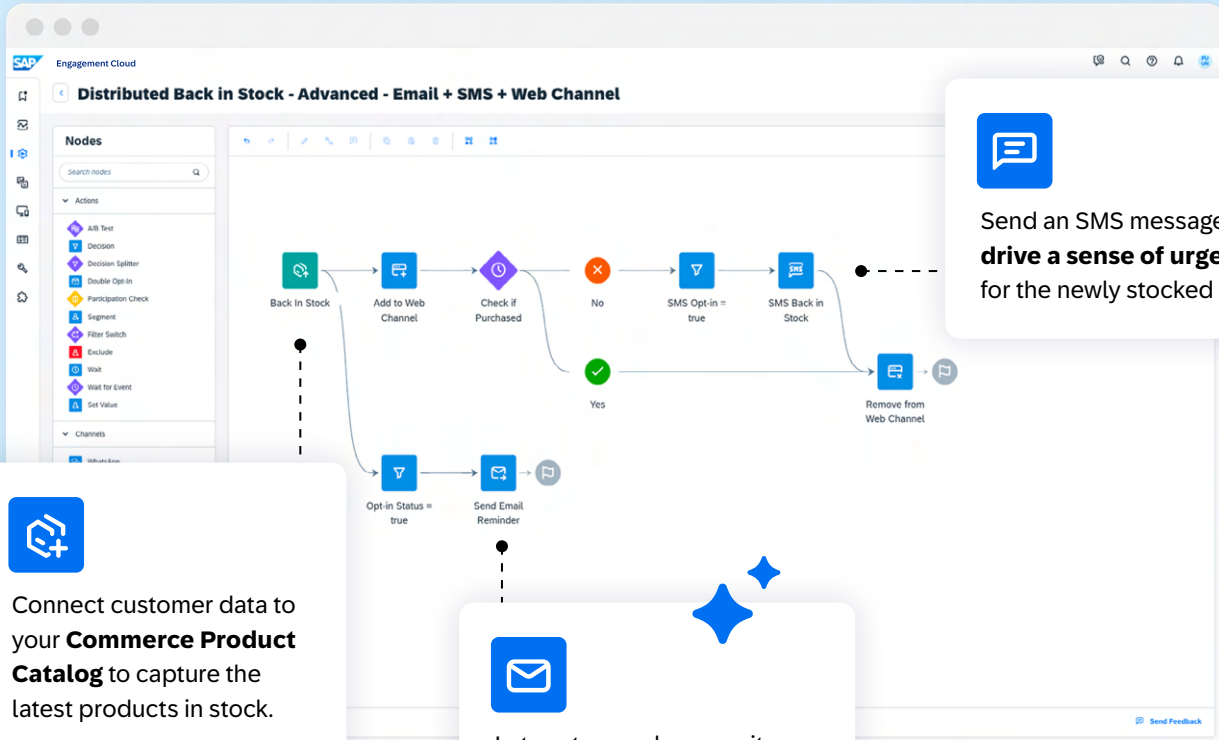
Solution

- Check for updates on your product catalog on a daily interval and specify a back-in-stock change to trigger this automation.
- Target your audiences based on contact behavior where the customer has viewed the product in the past 5 days.
- Be sure to exclude contacts who have already made the purchase within the past 5 days.

- Connect your customer engagement data with the SAP Commerce Cloud Commerce Connector and/or API Connection and/or Customer Data Cloud and SAP Cloud ERP for real-time shipping and operational insights to send timely, personalized SMS messages for those opted in to receiving SMS.

Optional Resources

- **SAP CX Service Offerings:** SMS concept and writing, personalization and ESL, Transactional messaging, use case and automation creation



Send an SMS message to **drive a sense of urgency** for the newly stocked item.



Connect customer data to your **Commerce Product Catalog** to capture the latest products in stock.



Let customers know an item is back in stock and give **product recommendations**.

Advanced




Trigger weather-based campaigns

Use Case:

Use weather-based triggers to deliver timely, personalized email campaigns for hyper-targeted promotion.

[Retail](#) | [E-Commerce](#) | [Consumer Products](#)

What to measure:

-  Click-through rate
-  Conversion rate
-  Purchases

“Once the impact of weather is measured, it can be managed. Weather analytics combines weather data with other datasets and draws on AI to predict trends or patterns, such as seasonal impacts, or produce actionable insights for instance, predicting how a heatwave might affect consumer behavior.”



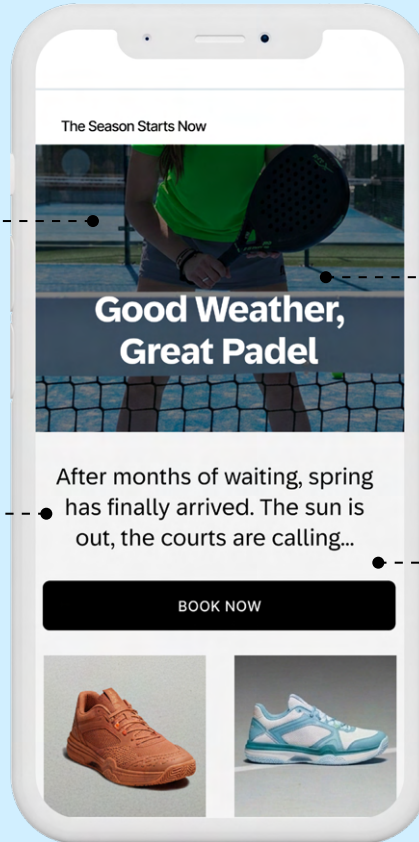
Evan Gold, EVP of Global Partnerships and Alliances, Planalytics



Live weather data triggers localized campaigns.



Automated cross-channel messages with personalized product offers are tied to weather patterns.



Relational Data segments audiences by region or condition.



Google AI agents pull live weather data, and when temperatures rise above threshold, the campaign triggers automatically.

Advanced

Trigger weather-based campaigns

Channels Included

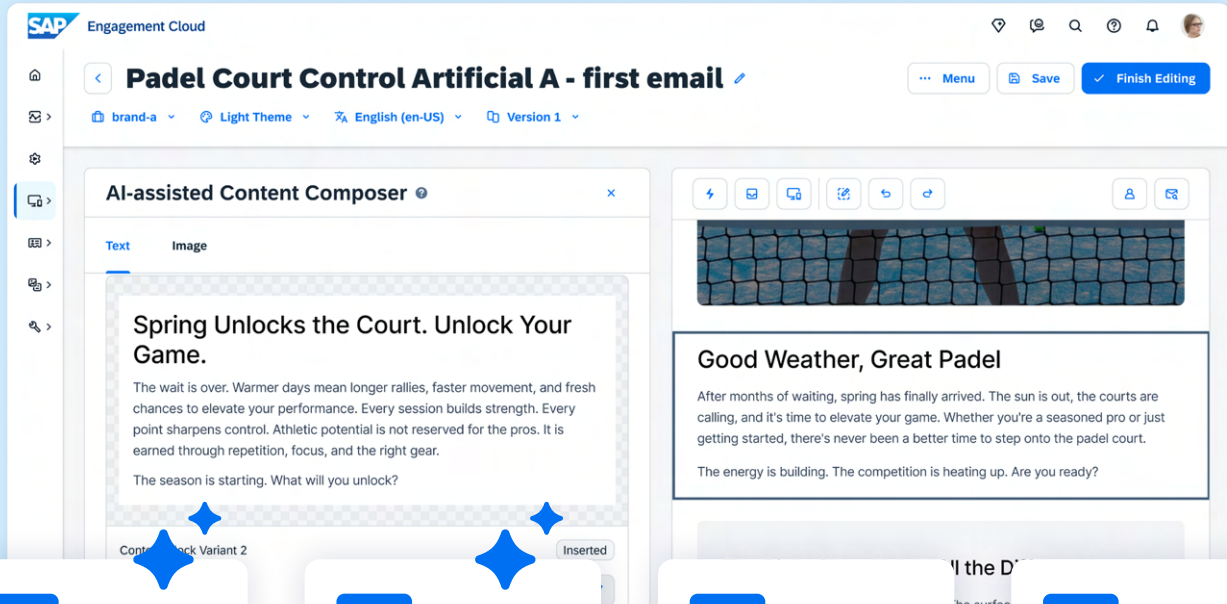
- Email


Solution


- Use Google AI agents to pull live weather data via API into Relational Data.
- Trigger automations based on conditions such as temperature, sunshine duration, and deviations from long-term averages.
- Send targeted email campaigns only when conditions are met, ensuring relevance and increasing likelihood of purchase.
- Personalize messaging to highlight the benefits of your product under current weather conditions, maximizing clicks and conversions.


Optional Resources

- **SAP CX Service Offerings:** Technical guidance on external APIs, Strategic collaboration on use case design and build, personalization, and ESL




Use a **Google AI agent** to aggregate **weather data** via API connector.


Segment audience by region, forecast, or conditions with **AI-assisted Segment Generator**.


Create weather based campaigns with **AI-assisted content composer**.


Measure sales uplift and engagement by weather scenario.

Expert




Enhance checkout experiences with Mobile Wallet

Use Case:

Streamline customer identification and speed up checkout by identifying shopper loyalty programs and digital vouchers.

Retail | E-Commerce | Consumer Products

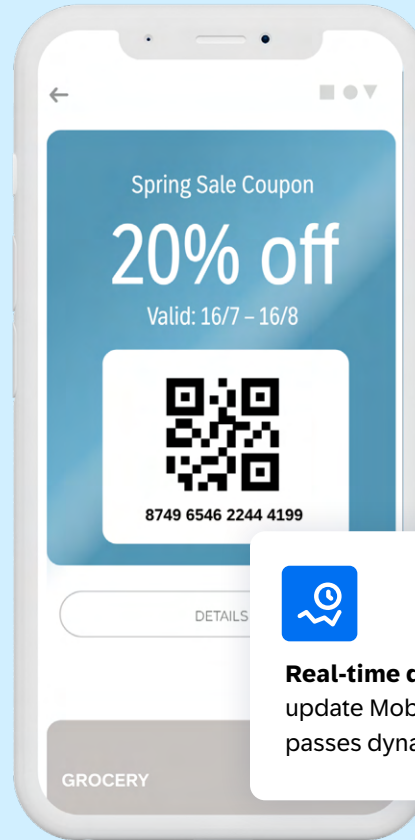
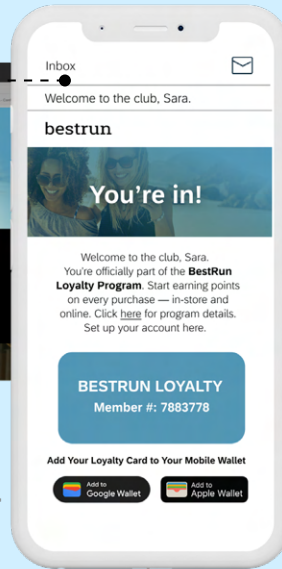
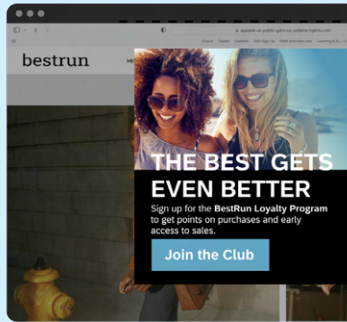
What to measure:


-  Checkout time
-  Staff productivity
-  Loyalty memberships


“ [With Mobile Wallet] I can send notifications to a lot of customers. It’s essentially a new channel we can use. It’s very beneficial, especially for our loyalty program. ”



Melanie Kordel, CRM Team Lead, CHRIST




Mobile Wallet passes
connect loyalty IDs at
checkout.


Real-time data feeds
update Mobile Wallet
passes dynamically.

Expert

Enhance checkout experiences with Mobile Wallet

Channels Included

- Mobile Wallet
- Email
- SMS

Solution

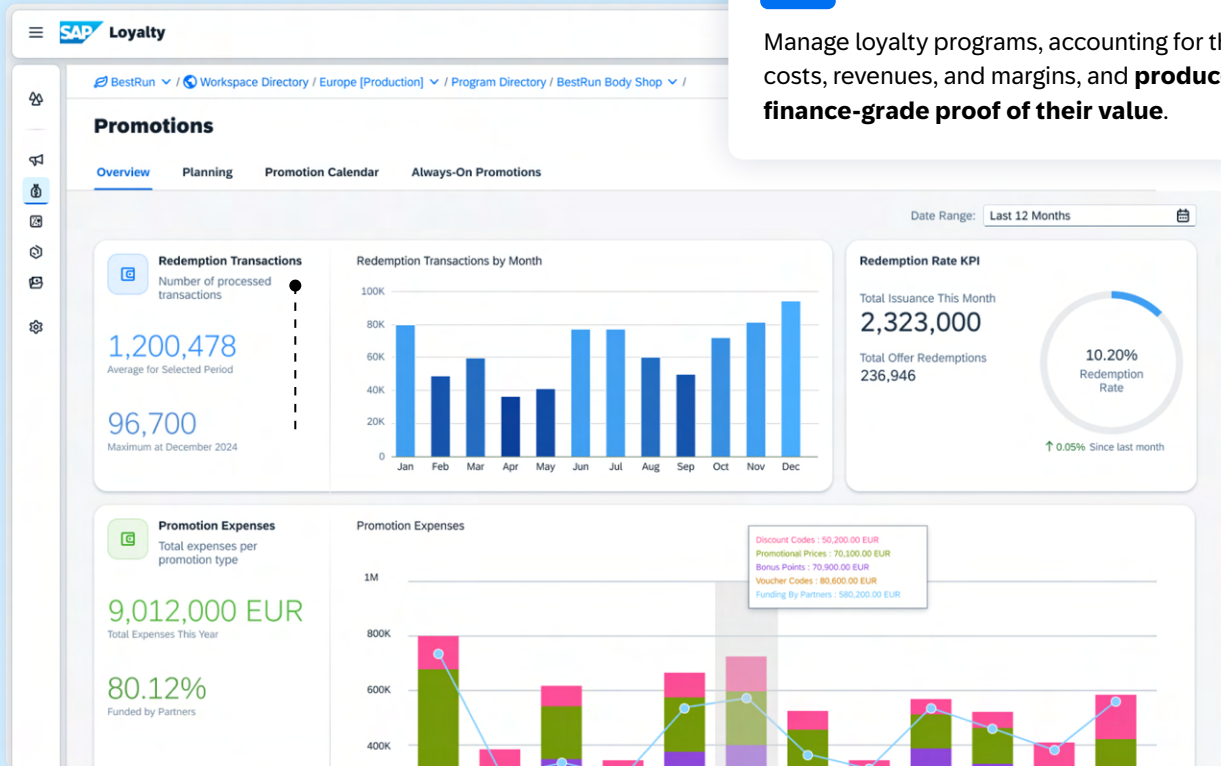
- Manage your loyalty programs with SAP Customer Loyalty Management.
- Use SAP Engagement Cloud to trigger an invitation via email or SMS to create a wallet pass when customers check out or sign up for your loyalty program.
- Reach customers wherever they are with limited-time offers, which they can add to their wallet and use at POS, enabling you to identify more customers at checkout.
- Send a loyalty pass that customers can add directly to their mobile wallet, allowing for richer customer insights.

Optional Resources

- **SAP CX Service Offerings:** Mobile Wallet concept development, personalization and ESL, use case and automation creation



Manage loyalty programs, accounting for their costs, revenues, and margins, and **produce finance-grade proof of their value.**





Increase Customer Retention



Beginner




Convert abandoned cart shoppers with connected ERP data

Use Case:

Keep mobile app users engaged by reminding them of items they have left in their cart via a strategic series of push notifications over the optimal amount of time.

Retail | E-Commerce | Consumer Products | Sports & Entertainment

What to measure:

-  Push notification open rate
-  Revenue from event attribution
-  Abandoned cart conversion rate

“[Mobile Engage] allows us to reach more contacts with our triggered app messages such as Abandoned Cart or Wishlist messages. Especially the Abandoned Cart program is showing pretty good results with an open rate of 8% and a conversion rate of 10.5%. ”



Franziska Fischer, Senior CRM Manager, NBB (notebooksbilliger.de)



Abandoned cart automation

Personalization

Predefined tokens

- Contact data
- Loyalty

Custom tokens

- Abandoned cart

Abandoned cart

Search

Last name

Personal recommendations - product title

Personal recommendations - product price

Personal recommendations - product image

abandoned cart: product name

abandoned cart: product price

Abandoned cart: product title

Use **personalization tokens** to easily promote the product abandoned.

Beginner

Convert abandoned cart shoppers with connected ERP data

Channels Included

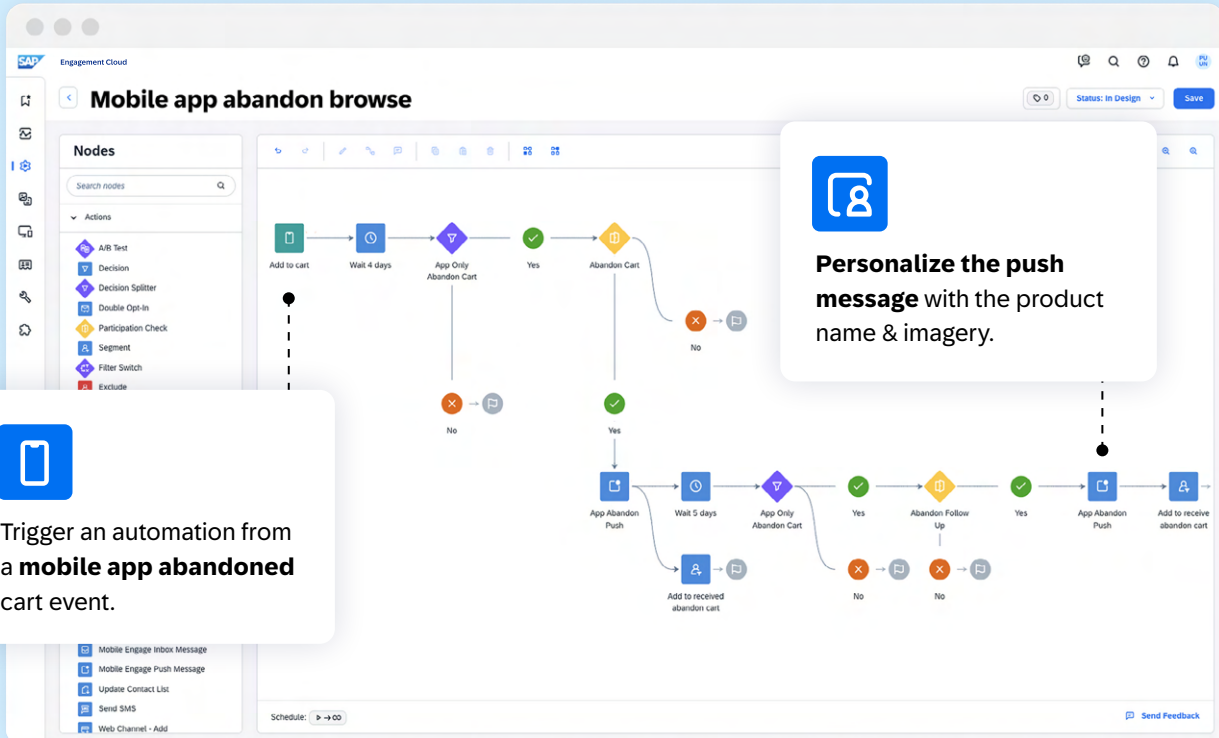
- Mobile Push


Solution


- Trigger a cart abandoned custom mobile event for this automation with connected operational data from your SAP Cloud ERP.
- Isolate only app users and target both anonymous and known customers.
- Send a cart abandoned push notification.
- Deliver a reminder notification if no purchase has been made.

Optional Resources

- **SAP CX Service Offerings:** Mobile Push concept and writing, design and execution, personalization and ESL, transactional messages, automations/interactions, in-app templates, geofence and beacons




Trigger an automation from a **mobile app abandoned cart** event.


Personalize the push message with the product name & imagery.

Advanced




Reactivate inactive loyalty program members

Use Case:

Reignite interest among inactive members. This use case transforms passive audiences into active participants with targeted messages that drive action and build loyalty.

[Retail](#) | [E-Commerce](#) | [Consumer Products](#) | [Sports & Entertainment](#)

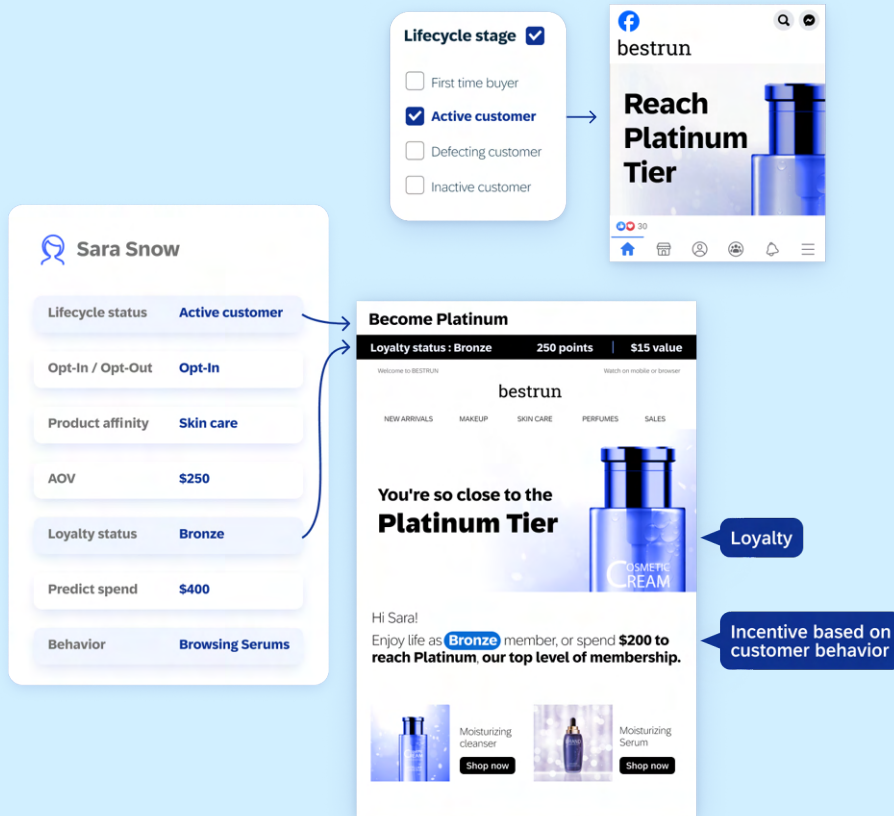
What to measure:

-  Customer churn
-  Purchase frequency
-  Premium customer revenue

“ We recognize the growing consumer demand for sustainable products and services, which is why we integrate sustainability into our core strategy. It gives us the competitive edge in terms of driving brand loyalty. To enhance the effectiveness of our sustainability initiatives, our digital strategy is critical. With SAP Engagement Cloud, we can leverage data-driven insights and also understand how to enhance the effectiveness of these sustainability initiatives for our sustainability-minded segments. ”



Naresh Krishnamurthy, Senior Manager, Business Transformation, Cosmetics, Molton Brown



Advanced

Reactivate inactive loyalty program members

Channels Included

- Email
- Mobile In-App
- Mobile Push

Solution

- Every month, trigger an email send to a loyalty segment of members with no activity in the last 30 days.
- Use personalization tokens to personalize incentive email.
- Follow up with a reminder email to same audience segment 12 days later.
- Forensically track the performance of loyalty programs, accounting for their costs, revenues, and margins, and produce finance-grade proof of their value with SAP Customer Loyalty Management.

Optional Resources

- **SAP CX Service Offerings:** Email concept and writing, design and execution, personalization and ESL, automations, and optimization



The screenshot displays the SAP Engagement Cloud interface for a workflow titled "Inactive Member (Loyalty) - Email + Mobile". The interface includes a left-hand navigation menu with icons for home, messages, settings, and other functions. The main content area shows a flowchart of the workflow steps:

- Nodes:**
 - Entry Points:** Data Change, Form, New Contact, Target Segment, On Auto Import, Recurring Filter, Entry from Program.
 - Actions:** A/B Test, Email Behavior Check, Exclude, Segment, Filter Switch, Schedule, Quick Filter.
- Workflow Diagram:** A sequence of steps including "Every 1 month(s)", "2025-03-14 00:08:48 S...", "Distributed on 2025-03-14...", "Amex Cloud - Inactive Mem...", "4 day(s) 08:12:00", "2025-03-14 00:08:48 S...", "Include", "Distributed on 2025-03-14...", "Amex Cloud - Inactive Mem...", "4 day(s) 08:07:00", "2025-03-14 00:08:48 S...", "Include", and "Amex Cloud - Inactive Mem...". There are also "Exclude" steps with a red 'X' icon.

A callout box with a blue notification icon contains the text: "Send a timely **mobile in-app or push message** automatically alongside a personalized email." Below the callout, the text "Schedule:" is partially visible.




Expert

Drive leads from online to in-store for first purchase

Use Case:

Help your customers research online then point them to an offer they can redeem by adding directly to their mobile wallet, allowing for easy and convenient in-store identification, richer customer insights, and frictionless customer experiences.

What to measure:

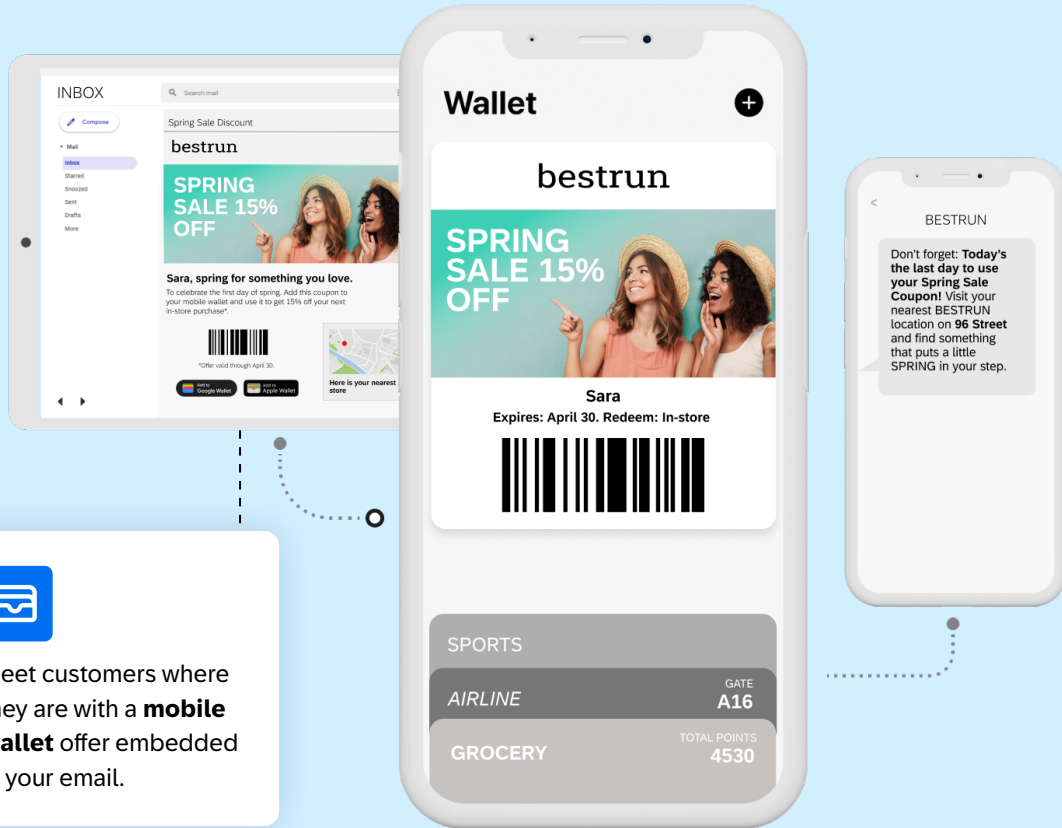
-  In-store or event engagement
-  Mobile wallet downloads
-  Mobile wallet redemption


Retail | Consumer Products

“We now have a customer that throughout their journey will spend time both online and offline. You have to realize that that customer probably looks at the ad online, goes to the store, tries the shoe on, goes back, ponders that with their partner, looks at the different prices, goes back to the store, and maybe makes the purchase online or offline. But that doesn't really matter as long as it's a seamless customer experience that goes omnichannel online and offline.”



Michael Chalhoub, President Strategy, Growth, Innovation & Investment, Chalhoub Group




Meet customers where they are with a **mobile wallet** offer embedded in your email.

Expert

Drive leads from online to in-store for first purchase

Channels Included

- Mobile Wallet
- Email
- Digital Ads
- Web Push

Solution

- Create a mobile wallet campaign with a voucher to redeem in store or at an event.
- Build a segment dynamically with the Campaign Assistant, providing access to Audience Identification Agent.
- Set up a re-occurring filter and use filter switches to predict whether the customer is most likely to engage online or via email.
- Optionally add multiple waiting periods to test the optimal time periods to be in a web or digital ad campaign.

- Refresh your list to remove dormant customers and focus on the hottest leads.
- Use the Campaign Monitoring Agent to monitor performance and optimize through the Campaign Assistant.

Optional Resources

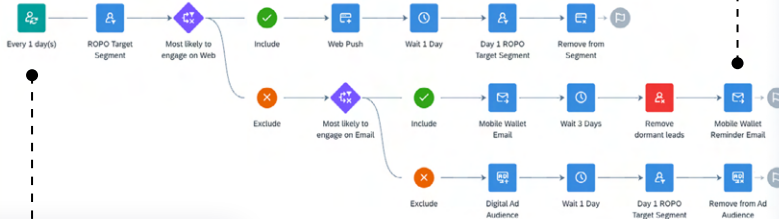
- **SAP CX Service Offerings:** Strategic collaboration on use case design and build, Studio support with omnichannel campaigns, personalization, and ESL



Use agentic workflows to design a segment to **target the most relevant leads.**



Include a **mobile wallet offer** within your email to redeem in your store or at your event.



Create a **reoccurring filter** to update your segment every day.



Use the AI Assistants in Joule to **build and launch channel-ready assets across channels.**

Joule Today 9:45 AM

We're seeing customers research online but convert in-store. I need a campaign that connects that journey and drives first purchase.

How about I build a campaign that turns online intent into in-store action using mobile wallet offers?

Great. Can you activate across the most revenue driving channels.

Deploying:
Mobile Wallet: Personalized, redeemable offer
Email: Product-driven message with "Add to Wallet" CTA
Digital Ads: Retarget high-intent users with localized offers
Web Push: Real-time reminders to drive wallet adds

I'll optimize with a reoccurring filter, adjusting messaging, suppressing once redeemed, and tracking store visits and conversions.

Message Joule

Joule uses AI, verify results.



Get to know SAP Engagement Cloud

See personalization in action on our Product Hub.

Watch Now

Looking for ways to expand your omnichannel personalization?

Extend your capabilities, unlock additional value, and add the functionality you need to scale through the extensible SAP partners.

Discover Now

Ready for hands-on support to turn your vision into reality?

Our Services Team offers expert support to help you implement the ideas in this playbook and more to drive real impact.

Learn More



Go Time!

The work doesn't stop with the Playbook — in fact, this is just the beginning. Now it's time to take action, turn insights into strategies, and strategies into results. Wherever you are in your marketing journey, SAP Engagement Cloud has the tools and support to help you go further.

Marketing success doesn't happen overnight, but with the right tools, partners, and guidance, you'll be ready to tackle any challenge. Let's take this journey together and make your next big move count.



Gartner, Magic Quadrant for Personalization Engines, by Penny Gillespie, Jason Daigler, Michael Ro, Ross Cosner, 2 February 2026
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