



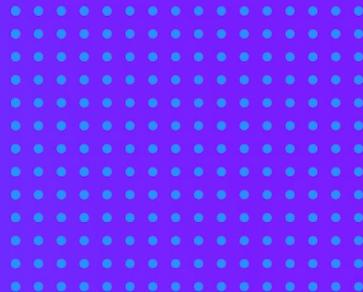
Personalization at scale: How Calendly leverages personalization to be the perfect solution for 20 million users

Darren Chait

Head of Growth
Marketing, Calendly

Thilo Richter

VP, Product Management,
Optimizely



Agenda

1. Introduction
2. Experimentation at Calendly
3. Our take on personalization
4. Optimizely for personalization
5. Q&A

01

Introduction

Darren Chait

Head of Growth Marketing, Calendly

Sydney, Australia



The four pillars of personalization



Integrating good data for the purposes of personalization

Wednesday, 3:45pm

Content personalization: how to win with your content

Thursday, 3:15pm

Elevating your personalization strategy: A framework for success

Thursday 11am

Personalization at scale: how Calendly leverages personalization for their 20 million users

Thursday 11am

Personalization at Optimizely



Segment

Using behavioural data to identify different audience segments and tailor content to their characteristics.

Automate

Using ML algorithms to customize content and product recommendations based on how users interact with your website.

Integrate

Incorporating offline data sources into your user profiles, creating more sophisticated audience segments

Optimize

Experimenting with different variations to create the optimum user experience

Individualize

Leveraging extensive data and advanced algorithms to create a highly customized 1-1 website experience for every individual user.

02

Personalization with Optimizely

[insert title]

We are the leader in scheduling automation

86%

of the Fortune 500 use Calendly, including 14 of the top 15 financial companies

100k

Organizations are Calendly customers

20m+

Users

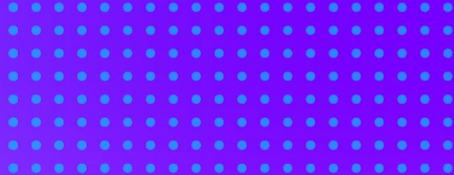
230

Countries with Calendly users

03

Our experimentation culture

**Democratization of
experimentation**



A culture of experimentation

Experimentation at Calendly

Product

Core

Growth

Experiment HQ

Marketing

Ads

Lifecycle

Website

CX

Customer Success

Customer Support

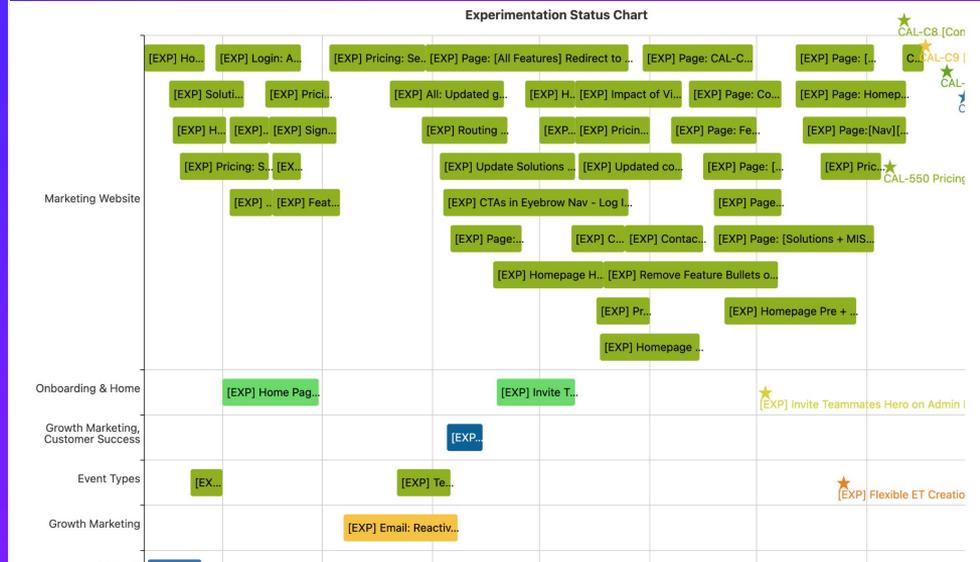
Knowledge / Edu

With support from



Our tricks

- Clear guidance on when to experiment or not?
 - Learn something
 - Seatbelt / de-risk changes
- Uniform experimentation templates and reporting
- CoE model with office hours
- Consolidated reporting to the business including dashboards
- Peer review of experiments



[EXP] Name of Experiment

The naming convention for Page Title: [EXP] Experiment Name (for example, [EXP] Booking Page: New Nav Bar)

Page Properties		Add/delete the necessary team members listed below. Don't know who's on what team? Use this Miro.	
The table below is mandatory in order to populate in our Product Experiment Tracker. If the fields are optional, they will be indicated by the placeholder text.			
Experiment Name	The standard name for your experiment. Please ensure consistency across this page, the experiment tool, slack channels, etc.	Experiment owner	@owner or working g
Previous Iteration	No previous iteration If this is an iteration of a previous experiment, include link to the parent experiment page.	Analyst	@decision experime
Status	DRAFT READY FOR LAUNCH LIVE ANALYSIS CONCLUSION choose from the statuses here [draft, ready for launch, live, analysis, conclusion]	Designer	@designer experime
Team	Name of Team that owns the experiment. See complete list within the Master Experiment Tracker	Content	@content experime
Start Date	TBD (use '/date/' when decided) The date the experiment launches / starts	Tech lead	@EM or d experime
End Date	TBD (use '/date/' when decided) The date the experiment concludes / ends (use runtime to predict end date - if start date is known, the end date should be as well.	QA	@QE wor experime
Business Metric	The business metric that is used to measure the success of the experiment.	CS-OPS	@KM ass driving th

04

Personalization @ Calendly

**How we think about
personalization**



The size of our market is both a marketer's dream and worst nightmare



Segmentation is the key



Role

Decision maker,
IC, scheduling
use case



Department/ Function

Use case but also
influence and role in
adoption (IT vs sales
vs recruiting)



Inferred intent

Where did they come
from? How much do
they want to solve the
problem?

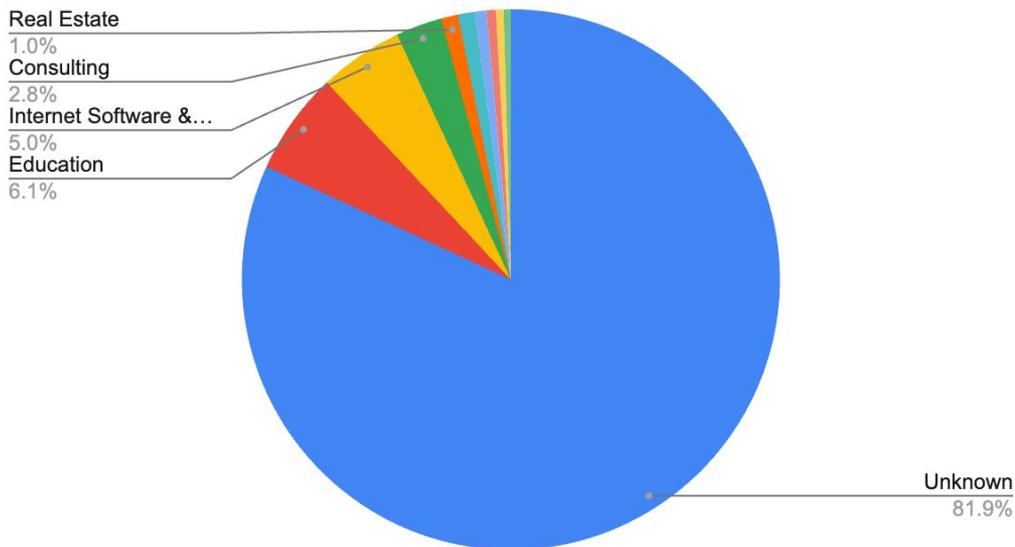


Firmographic

Industry, country,
employee count,
revenue etc.

But, enrichment is so 2020

Signups by Sub-industry (Enriched)



Technical details

IP address	73.78.73.84
Address type	Public
Protocol version	IPv4
Network class	Class A
Conversions	1229867348 (decimal / iplong) 494e4954 (hex / base 16) 73787384 (numeric)
Reverse DNS	84.73.78.73.in-addr.arpa
Hostname	c-73-78-73-84.hsd1.co.comcast.net
Reverse lookup	c-73-78-73-84.hsd1.co.comcast.net
ISP	Comcast Cable
Company	Comcast Cable

We've gone back to basics

Calendly Product Solutions Enterprise Pricing Resources My Account

Explore time-saving features for enhanced team productivity

Select your team to customize your experience.

All Teams Sales Customer Success **Recruiting** Marketing IT Education

- Coordinate any interview**
Automate scheduling for every interview scenario, from simple phone screens to complex, multi-step panels.
- Automate communications**
Reduce no-shows and maintain candidate engagement with customizable email and text notifications.
- Automatically sync to your ATS**
Keep candidate records updated automatically when an interview is booked, rescheduled, or canceled.

Calendly Product Solutions Enterprise Pricing Resources My Account

All Teams **Sales** Marketing Customer Success Recruiting IT Education

Explore Calendly's core features for sales teams

CRM Integrations Embeds Lead routing Workflows Calendar integrations Extensions Rep...

Integrate with Salesforce

monday.com Products Teams Platform Resources Pricing Contact sales Log in Get Started

A platform built for a new way of working

What would you like to manage with monday.com Work OS?

- Creative & design
- Software development
- Marketing
- Project management

HONEYBOOK Features Templates Pricing Resources Log in Start free trial

The all-in-one clientflow platform for those who do it all

What do you want to do with HoneyBook?

- Send invoices
- Sign contracts
- Book & schedule
- Automate workflows
- Track inquiries
- Manage projects
- Send forms & questionnaires
- Accept online payments
- Not sure

Trello Log In Sign Up

Work with any team

Whether it's for work, a side project or even the next family vacation, Trello helps your team stay organized.

Start doing -->

Team Tasks

Doing	Done
Client meeting	Publish podcast
Plan webinar	Launch website
Email newsletter	

What is your current role?

- Marketer
- Designer
- Developer
- Other

Other vectors of personalization



Behavioral

What are they clicking on, browsing, scrolling, hovering on.

Are they a user?



Self-selection

How do they self-identify?



Referrer

Where did they come from? What do they know about us? What does the referrer say about them?



Enrichment

What does IP or domain based enrichment return?

English | Talk to sales

Calendly | Product | Solutions | Teams & Company | Pricing | Resources | Log in | [Get started](#)

[New feature](#) Calendly Routing →

Easy scheduling ahead

Calendly is your scheduling automation platform for eliminating the back-and-forth emails to find the perfect time – and so much more.

Sign up free with Google or Microsoft.

[Google](#) [Microsoft](#)

OR

Sign up free with email. No credit card required.

Select your team to customize

[All](#) [Sales](#) [Marketing](#) [Customer Success](#) [Recruiting](#) [IT](#) [Education](#)

Connect your calendars

Connect up to six calendars so you never have to worry about getting double booked.

Customize availability

Stay in control of your calendar with granular availability tools, scheduling rules, buffers, and more.

Mondays 11:00am - 4:00pm +
 Tuesdays 9:00am - 6:00pm +
 Wednesdays 1:00pm - 4:00pm +

Share your scheduling link

Easily book meetings by embedding Calendly anywhere on your website and adding available times to emails.

Automate

Automate and optimize attendance

← →

Loved by 20 million+ users

[DOORDASH](#) [lyft](#) [COMPASS](#) [L'ORÉAL](#) [twilio](#) [Dropbox](#)

English | Talk to sales

Calendly | Product | Solutions | Teams & Companies | Pricing | Resources | [My Account](#)

2 DAYS OF TRIAL REMAINING

Welcome back, Darren

Here are a few tips to help optimize your scheduling and get the most out of Calendly.

[My account](#) [Create new event type](#)

<https://calendly.com/darrenlink>

You've schedule X events in the past 30 days

Here's what other successful users do next

20%

- Invite teammates**
Enable collaborative scheduling and shared availabilities by inviting your team to Calendly.
- Create a collaborative event type**
Schedule meetings with the whole team, any member of the team, or share meetings amongst the team.
- Connect your CRM**
Keep your CRM up to date and ensure meetings are routed to the right person. →

GET STARTED

Wondering which Calendly plan is right for you?

In this 90-second video, we'll give you an overview of our plans and what's included.



Rahul Mehta · 2nd

Driving 100-1000% of Repeatable Revenue Growth Thr...
1mo · Edited · 🌐

+ Follow ...

Calendly's homepage now displays your specific link when you're logged in!
I've spent so much time going to calendly to copy my link which is easily >5 clicks.

Now, it's just 1.

Less clicks = less friction = always better for the customer

#growth #growthmarketing #digitalmarketing #gtmstrategy
#conversionoptimization



Robert Kaminski 🌐 · 2nd

Partner @ Fletch | Product Marketing for Early Stage B...
1w · 🌐

+ Follow ...

Super cool to see Calendly dynamically change the home page for logged in users.

Gives me exactly what I'm looking for as an existing user when I go to their site.
Jeff Hardison — How are you doing this? 🤖



Product Solutions Enterprise Pricing Resources
English
My Account



Yar

@yaroshidi

When you to calendly.com and you are logged in, you get to see your link right there on the header section ready to be copied to the clipboard, and that's exactly what I wanted to do on the website.

Talk about a good User Experience!

Awesome update from @Calendly
twitter.com/i/web/status/1...

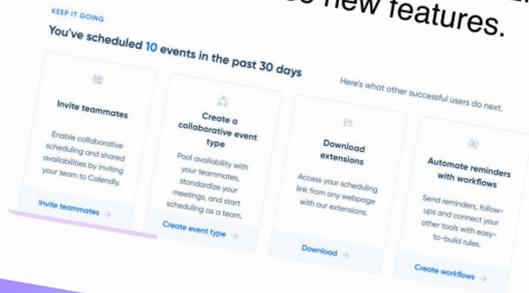


Jamie Onufrak

@JamieOnufrak

Love this from @Calendly.

Reminding someone how much they're using the product AND THEN suggesting they use new features.



Product Solutions Enterprise Pricing Resources

Welcome back, Rahul

We're here to help you optimize your scheduling workflow and get the most out of y

My account

Create new event type

<https://calendly.com/>

Jen Johnson and 5 others

And it works great

In our most recent experimentation with role-based self selection:

Those who self-identified had a:

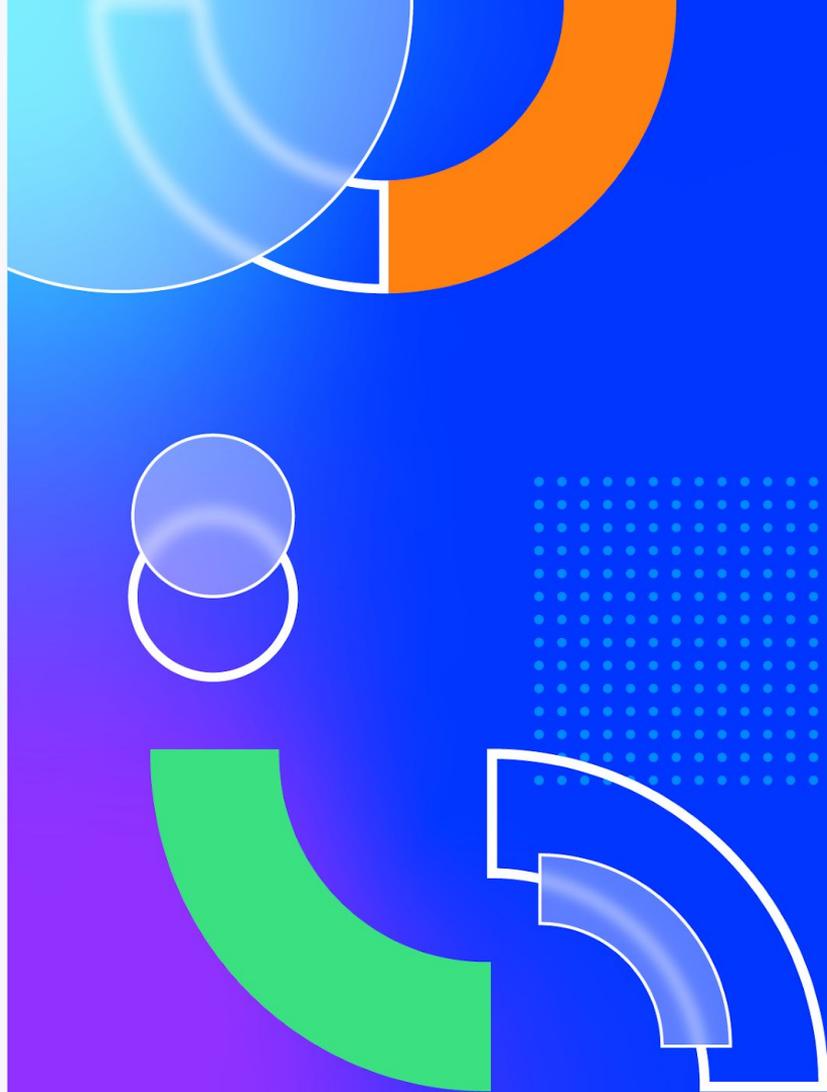
- 1.5% higher signup conversion rate
- 11.2% higher lead conversion rate

And showed very different roles breakdowns to what we thought we knew about our visitors.

In our most recent experimentation with user status personalization:

- 4.4% increase in meetings booked
- 5.4% increase in workflow adoption
- 3.8% increase in share actions

These are examples of behaviors that we promoted that we were able to directly influence.



05

Questions?

Important stats

slide: Arial bold 44pt

78%

Supporting text right here: arial 16pt Lorem ipsum dolor sit amet, adipiscing elit.

\$2.2M

Supporting text right here: arial 16pt Lorem ipsum dolor sit amet, adipiscing elit.

34%

Supporting text right here: arial 16pt Lorem ipsum dolor sit amet, adipiscing elit.

10X

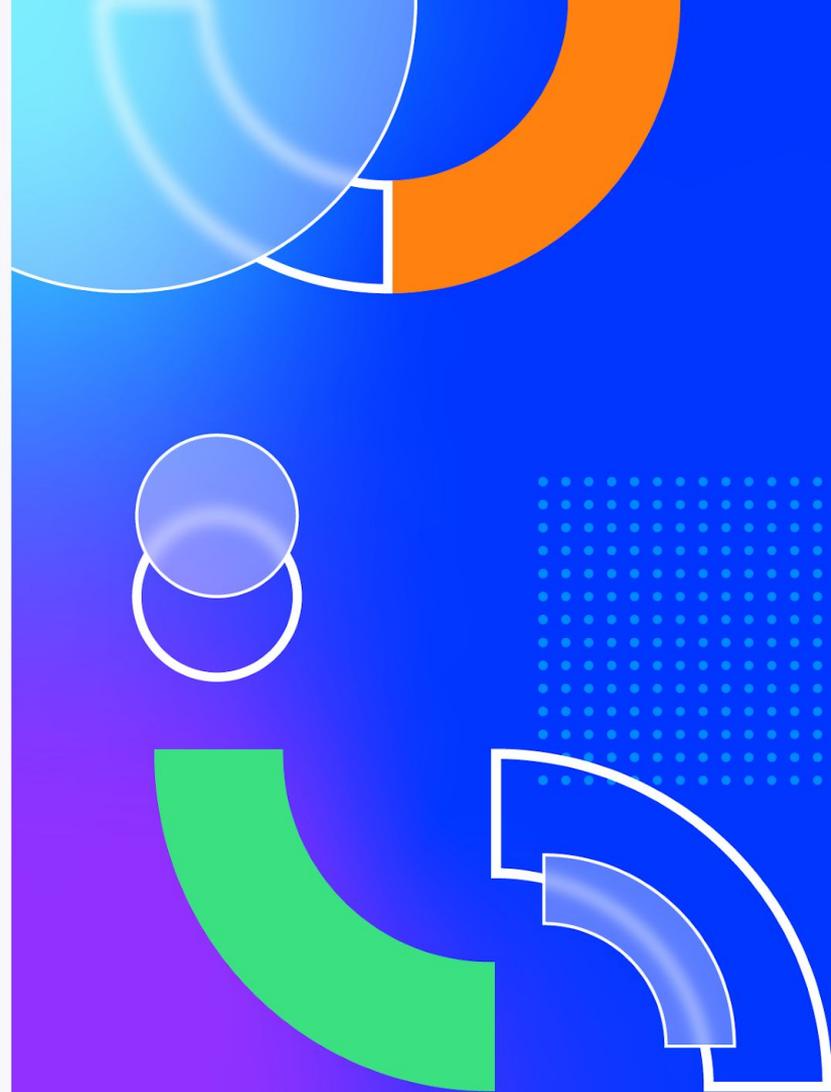
Supporting text right here: arial 16pt Lorem ipsum dolor sit amet, adipiscing elit.

Headline here: Arial bold 44pt

Optional sub header goes here: arial bold 18pt

Then go into your details below: arial regular 16pt. Bullet points or short body paragraphs are encouraged—breaking up your info will help your audience scan the content from a distance quickly.

Please be clear and straight to the point. Folks won't enjoy having to squint at the screen in order to read a super text-heavy slide. Three bullet points max. Or, alternatively, two short body paragraphs max.





Headline here: Arial bold 44pt

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Then go into your details below: arial regular 16pt. Bullet points or short body paragraphs are encouraged—breaking up your info will help your audience scan the content from a distance quickly.

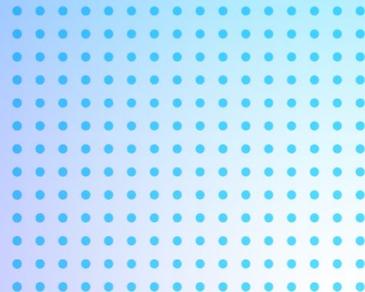
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Full name: Arial bold 18pt

Job title and place of work: Arial reg 16pt



Headline here: Arial bold 44pt

Optional sub header here: **Arial bold 18pt**

Then go into your details below: Arial regular 16pt.
Bullet points or short body paragraphs are encouraged– breaking up your info will help your audience scan the content from a distance quickly.

Please be clear and straight to the point. Folks won't enjoy having to squint at the screen in order to read a super text-heavy slide. Three bullet points max. Or, alternatively, two short body paragraphs max.



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Arial bold 44pt**



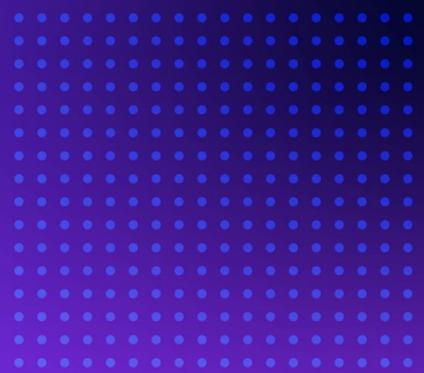
Two column slide: Arial bold 44pt

Then go into your details below: arial regular 16pt.
Bullet points or short body paragraphs are encouraged— breaking up your info will help your audience scan the content from a distance quickly.

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03

How it works

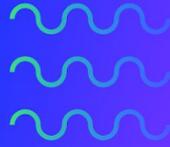
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bold 44pt**

Main point goes here: Arial bold 18pt

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information and general
context can go here
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Step-by-step or key points slide



First main point goes right here:
Arial bold 18pt

And optional supporting text: Arial reg 16pt



Second main point goes right here:
Arial bold 18pt

And optional supporting text: Arial reg 16pt



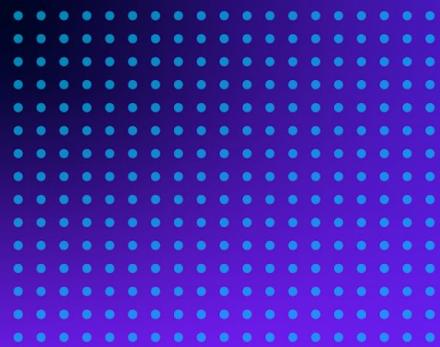
Third main point goes right here:
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And optional supporting text: Arial reg 16pt



Fourth main point goes right here:
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And optional supporting text: Arial reg 16pt



Conclusion, CTA, or thank you message here: **Arial bold 44pt**

Optional short and sweet supporting text here: Arial reg 16pt

