



## Personalization and AI with Erica Salm Rench

### Leading Learning Podcast Transcript for Episode 393

Erica Salm Rench: [00:00:00] In its very simplest form, yes, it's "Dear first name." But obviously technology allows us to do a lot more than that.

Celisa Steele: [00:00:11] I'm Celisa Steele.

Jeff Cobb: [00:00:13] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Jeff Cobb: [00:00:21] With the release of ChatGPT in November 2022, artificial intelligence broke into the mainstream and became a more practical rather than theoretical topic than ever before. AI has the potential to lighten the existing load and to enable new activities for learning businesses, particularly in the realms of marketing and personalization. Erica Salm Rench is the chief operating officer at rasa.io, which uses AI to send personalized newsletters to every recipient on an e-mail list. Prior to joining rasa.io, Erica worked in digital media and advertising at an agency, leading a team of content marketers, SEO specialists, Web developers, and online advertisers. She also worked at Tulane University in the undergraduate admissions world. Erica is passionate about designing effective marketing strategies, and she's an avid student of AI. In this episode, number 393, Celisa talks with Erica about the state of artificial intelligence, what's on the horizon for AI, e-mail marketing, personalization, the importance of data, and the interaction and interplay of humans and AI to get work done well. Celisa and Erica spoke in December 2023.

Celisa Steele: [00:01:46] Maybe just tell listeners who might not be familiar with rasa.io a little bit more about what you all do there.

Erica Salm Rench: [00:01:54] Absolutely. So what rasa does is we use AI to send personalized newsletters to each and every recipient on an e-mail list. We work a lot with professional and trade associations, publishers, and marketing agencies, like I said. But, oftentimes, the organizations that we work with say, "We're sending too many e-mails. We're not sending the right e-mails. We're not sending the right content that people want to receive." So that's what

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our AI does—we pick up on users’ behaviors, their interactions with content in order to further refine the content that we send them through an e-mail, so that you’re really hyper-targeting your audience members and really treating them like a segment of one. And we also help you shave many hours off the send process. Newsletter production can be tedious, and we’re not ignorant to that, and so we help people automate some of those more tedious pieces of the newsletter production process. And then another piece of it would be that many of our clients do have partnerships and sponsorships and use their newsletter as a revenue stream, so we help them amplify those revenue streams as well.

Celisa Steele: [00:03:08] So you mentioned that rasa makes use of artificial intelligence for part of what you’re doing there on the newsletter front. And I know you’ve been working in artificial intelligence for a long time, certainly well before the recent explosion of attention that I think probably, we can say, started with the release of ChatGPT about a year ago, in November 2022....

Erica Salm Rench: [00:03:30] Just had the year anniversary of ChatGPT’s release. I can’t believe it’s been a year already.

Celisa Steele: [00:03:36] And so, given the fact that you’ve been thinking about AI for maybe longer than some of our listeners, I’m curious to get your take on, people who maybe haven’t thought about it until pretty recently, the last few months, what are they getting wrong about artificial intelligence? Or is there anything that surprises you about the layperson’s view of AI at this point?

Erica Salm Rench: [00:04:00] Yes, it’s hard to put myself in the position of not knowing much about it at all because, to your point, I’ve been trying to follow this stuff for several years, and there were pretty massive developments in computing technology over the past decade that have really built up to this point. And ChatGPT’s release, obviously to your point, was a major explosion. I think everyone experimented with ChatGPT and, in many ways, has dabbled in using it for content generation. But what I would say most people are leaving on the table is the ideation piece of how ChatGPT can help them strategically, like starting from scratch on a project, the big intimidating project that you might be procrastinating on. Using a tool like ChatGPT or Google’s Bard or Anthropic’s Claude to get you started and help eliminate that writer’s block piece. So that’s one way that I feel like people see ChatGPT almost as a content creator, which it does pretty well, but it’s good as an assistant to help you execute on various tasks. And also a way that I just talked to a colleague about recently is number crunching and data analytics. She was saying, “Oh, I just hate pivot tables, and I have to pivot out all this

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information.” I said, “Why don’t you just plop your spreadsheet in ChatGPT and have it analyze that information for you?” I don’t think people think of ChatGPT as the first thing when they think about that tool.

Celisa Steele: [00:05:34] I do like that idea of helping get past the writer’s block, as you said, the blank page, the blank screen. Just being able to turn to ChatGPT and ask an open-ended question, see what comes back, might lead you down an interesting path that then you decide to explore more. So we’re talking about the current state of AI. I’m also interested, given, again, your long experience with AI, what’s your view of what’s on the horizon? What is coming next? If we look at the release of ChatGPT as a big event in the recent history of AI, what’s on the horizon? What do you think is going to change next? What do you think we’re going to see that will really impact how we’re living and working?

Erica Salm Rench: [00:06:17] Yes. Well, for those of you who might or might not follow the saga of what’s been going on at OpenAI and with Sam Altman, there’s a lot of speculation that the reason he was let go from OpenAI is because of potential massive developments in what one would call general intelligence—machines that are not just smart machines but even smarter than humans on any particular subject and can begin to take actions. So like AI agents, which that’s probably going to be the next thing that we’ll see is agents being able to actually submit forms and buy things for you and take those actions and not just spit back out content, whether that be audio, video, imagery, written content, which is what I think a lot of people are starting to dabble in right now and start to use AI for. But bringing things to the next level and actually executing for you is probably going to be what comes next. How soon it will be widespread, I think, is a question still outstanding, but it’s coming.

Celisa Steele: [00:07:26] Yes, and that’s when it gets very much what everybody always has pictured about the future of AI—the sentient being, if maybe not in that shape, but able to do many more of those things that humans have done.

Erica Salm Rench: [00:07:39] Yes, exactly.

Celisa Steele: [00:07:41] I’m thinking about the learning businesses that listen to the Leading Learning Podcast, and I’m thinking about, for them and in their marketing, what are some easy or obvious first steps? If they’re looking at how can they make use of AI to help support them in marketing their offerings, what would you recommend?

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Erica Salm Rench: [00:08:03] Well, I think, just even in asking that question, you're spot on. Obviously, the folks that you work with, the creation of the content is this needs to be still human. Their learning content, they are the certifying body, or they are the teaching body, so it is probably very important that they're that first-party source for the creation of the actual learning modules. But you said, "How can they market it?" I think that's where AI becomes really powerful because, if you're writing promotional content about the learning module, that's a place where you can use some generative copy or have an image generated for you that goes along with the blog post or a social media post that it is meant to promote that particular learning module or using AI to summarize the content that's in the module in order to create the various promotional pieces of content. And then there are so many great tools out there that allow for the automation of your social media posts going out, recycling out the promotion of any learning module, course, or certification program. So, instead of posting something once and just saying, "Okay, well, I already did a social media post about that," there are tools out there that help you recycle back out those social posts and intelligently post them at the right times and promote them to the right audience.

Celisa Steele: [00:09:34] You just mentioned social there, but we've been talking about e-mail as well, and I do feel like e-mail tends to be the backbone of most of the promotion that the learning businesses, at least that we interact with, rely on for promoting their products and services. But I also feel like we're hearing more about the difficulty or increasing difficulty of really getting the attention of their e-mail recipients. First, I'll just pause that to ask is that a general trend that you're also hearing, in terms of is it actually getting harder to get people's attention?

Erica Salm Rench: [00:10:08] Well, e-mail is the dinosaur that hasn't gone away, or at least yet. That's the world that we operate in. And e-mail is definitely going to... I hadn't mentioned it in my first response, but it should still be a core piece of your marketing plan for anything that you're going to promote because it is a channel that is far more reliable than social media or paid online ads. You have a much better chance of getting someone's eyes with an e-mail than you do on a social platform or in a search engine results page. And, obviously, that's the space that I operate in. In addition to just a one-size-fits-all e-mail having a better chance of getting someone's eyes, we help people get their subscribers' attention with e-mail because we personalize the content. So there is the opportunity to use a tool—some sort of tool, like rasa—to really hyper-segment or hyper-target people with the right learning content or promote your learning content in an advertising space within an e-mail that's surrounded by personalized content relevant to the individual. But, to your point, e-mail should not be ignored. It's still a very effective channel compared to the others out there.

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Jeff Cobb: [00:11:29] At Tagoras, we're experts in the global business of lifelong learning, and we use our expertise to help clients better understand their markets, connect with new customers, make the right investment decisions, and grow their learning businesses. We achieve these goals through expert market assessment, strategy formulation, and platform selection services. If you're looking for a partner to help your learning business achieve greater reach, revenue, and impact, learn more at [tagoras.com/services](http://tagoras.com/services).

Celisa Steele: [00:12:00] Talk a little bit more about any strategies, tactics, or approaches that really seem to work to help make that e-mail stand out. Because I know my inbox is incredibly crowded.

Erica Salm Rench: [00:12:09] Yes. It's still a competition to get someone's attention with an e-mail. Obviously, personalization of newsletter content is one way you can do it. And, as simple as it sounds, targeting people based on where you collect their e-mail on your Web site can also be really effective. And this is a very simple method that's been around for some time, but, if you have a form where you collect people's information, if they're interested in learning more from you, just tagging people and putting them into a segment based on where you collect their information on the Web site, like what landing page they came in through, putting the forms throughout the Web site so that you can really capture where they came in, what converted that person so that you can give them more of what they're interested in.

Celisa Steele: [00:13:00] And so, then, behind that answer is just that data is needed in order to make the personalization work and to make the e-mail stand out and be as relevant as possible to that particular recipient.

Erica Salm Rench: [00:13:13] Data and automation. Or else you'll spin your wheel.

Celisa Steele: [00:13:17] Drive yourself crazy.

Erica Salm Rench: [00:13:18] Yes.

Celisa Steele: [00:13:19] Yes. Okay, well, we've been talking about personalization, and I know that is a big area of focus for rasa. It does seem to hold a lot of promise for marketing because, if you can contextualize and really focus that message for that individual, it's going to be more effective. We also talk a lot about personalization in the learning world. The more you can do to tailor that content specifically to that individual and where they are in terms of their knowledge

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and skills, it's going to be that much more effective. But I also feel like personalization can be a bit of a vague or at least a broad term. Sometimes people might talk about personalization just being the e-mail says, "Hi, Celisa" instead of "Hi, Erica."

Erica Salm Rench: [00:14:02] Yes, just like token, like first name token.

Celisa Steele: [00:14:06] Right. But I feel like you're talking about a much deeper kind of personalization, where you're really looking at what is the right content, and you're talking about even down to this segment-of-one idea there. How do you think about the range, or different types, of personalization? And then are there types of personalization that are more effective than others?

Erica Salm Rench: [00:14:26] Sure. In its very simplest form, yes, it's "Dear first name." But obviously technology allows us to do a lot more than that. Another type of personalization would be like what we do at rasa—personalizing the content that's served up within the e-mail. I also think about personalization from timing of e-mails. We have a pretty sophisticated way that we nurture folks in our database. If someone comes in seeking more information, but they might not have actually wanted to get the demo yet or sign up for the self-serve product, we have a way that we first start nurturing them at a faster cadence and then, if there isn't as much interaction, it's a little bit more spread out. After a certain amount of time, they might get added to our newsletter list. So it's a bunch of rules to ensure that someone who has been interested, even who might not have taken an action, is still nurtured to an extent so that, when they are ready to make a switch and come over to us for an AI newsletter, we're still top-of-mind. And that's ultimately what we're trying to do with the newsletter too. You're providing really relevant and informative educational content so that, when it does come time to volunteer at the conference or sign up for the conference, your organization is top-of-mind because you've been providing such relevant, valuable content throughout.

Celisa Steele: [00:15:54] We talked about the need for data—we were talking about understanding where people come into the Web site and being able to segment them based on that landing page. That need for data around how someone interacts with you or comes to interact with you is one part of it. The other part of it is that, if you're personalizing this content, then you have to have enough content, enough volume of content or breadth of content, that it works to personalize. Can you talk a little bit about organizations that you work with. Do they typically come in already having that range of content, and what they're really looking for is the help with automating it and making that easier? Or do they come in and have this aha moment of "Oh, this is the breadth of content we need to go out and build"?

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Erica Salm Rench: [00:16:39] That is a fabulous question. We have clients all over the spectrum. On one end of the spectrum, you have your ASAEs, and you have your American Bankers Association, and they are content powerhouses. The majority of the content in their *rasa* newsletters is going to be content that they've created in-house, and they might supplement a bit with some external relevant sources. Now, on the other end of the spectrum, we also have plenty of clients who don't create any content, or they create one blog post a month, and so they're going to lean a lot more heavily on the external relevant industry sources to supplement their own internal content, if they create any at all. And so what we'll work with them to do is figure out what are the authoritative sources in the space. We'll automatically pull those into what we'd call the content pool. In some cases, we're filtering down those sources. So we'd say, "Well, we want this source to come in, but only if 'online learning' is the keyword or phrase." And then, from that relevant pool of, let's say, 30, 40 pieces of content, we're going to personalize for the individual based on what we've learned about them and what we know they're interested in reading about. But many of our clients lean on those external sources, so that, to your point, they're not pressured to create so much content, that the AI has plenty to choose from.

Celisa Steele: [00:18:08] Another question about how this works because you were talking about rules when you were talking about the cadence at which you were nurturing particular prospects. And, when we first were talking about AI and talking about the next step in AI being more of these agents that can do more, what's the mix at *rasa* in terms of the human control or input versus what's driven by AI around those kinds of rules or that sort of segmentation or any of what you're doing there?

Erica Salm Rench: [00:18:38] Yes, that's a great question. We use *rasa* and HubSpot together. A lot of our clients use *rasa* and HubSpot together. And the rules are developed within HubSpot, and then the AI and the recommendation algorithm, that's within *rasa*. So, if there is such a rule in HubSpot that someone gets added to an organization's newsletter, then that will sync with the *rasa* platform, and then, as soon as *rasa* picks up on the fact that Erica is interested in AI or marketing or branding or what have you, then *rasa* is going to learn that in order to recommend me the relevant content. But what *rasa* can also do—and this is a piece of why a lot of our clients work with us—is that we can also push those topical interests back into your CRM, like HubSpot, so that you can develop more rules off of people's interests on the CRM or AMS.

Celisa Steele: [00:19:38] Cool. Yes, the integration of the tech stack there sounds very powerful.

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Erica Salm Rench: [00:19:42] Yes, and we try to make integration not a scary word. We've pre-built a lot of our integrations, at least a lot of our subscriber-based integrations, so that doesn't have to be a deterrent for getting started.

Celisa Steele: [00:19:54] I'll shift gears just a little bit. One of the questions we always like to ask guests who come on the Leading Learning Podcast, given that this is the Leading Learning Podcast, is about their own professional and potentially personal development. And so I would be curious to know how you go about continuing to grow. Do you have habits, sources, or approaches that you use to make sure that you're staying on top of things?

Erica Salm Rench: [00:20:19] I love that question. I'd love to talk about that. I am a big podcast listener, which is why I love to go on podcasts—because I love to listen to podcasts. I'm also, though, a mother of three, so I don't necessarily have a lot of time to sit down and curl up with a book. Whenever I'm in the car, I'm always listening to podcasts to make sure that I'm staying on top of the various topics that I'm interested in. So that's one way that I kill two birds with one stone, so to speak. And, also, when I'm running or exercising, I'm always listening to podcasts and not music, although I wish I could listen to more music, but I feel like that's a tradeoff that I've had to make. In the car or when I'm on my feet, I'm listening to podcasts. So that's one big thing. Or books on tape. Tape. Why did I say "tape"? Audiobooks.

Erica Salm Rench: [00:21:09] So I love the Amazon tool, the Amazon books, the audiobooks. You can subscribe. You get a credit per month. I forget what it's called off the top of my head. And then what else do I do? I'm a big Morning Brew fan—that's a good newsletter. I feel like it gives me a good synopsis of the current events that I might be interested in. I try not to listen to a ton of general news channels. I try to really hyper-focus my time on AI, marketing technology, and e-mail. E-mail is, of course, one that I like to stay on top of. Yes, so it's making sure that you have your trusted sources identified and then making sure that you have the time to devote to those, to consuming those sources. Easier said than done.

Jeff Cobb: [00:22:07] Erica Salm Rench is COO at rasa.io. In the show notes for this episode, [leadinglearning.com/episode393](https://leadinglearning.com/episode393), you'll find links to the rasa Web site, where you can learn about the solutions the company offers and Erica's work.

Celisa Steele: [00:22:25] At [leadinglearning.com/episode393](https://leadinglearning.com/episode393), you'll also find options for subscribing to the podcast. We'd be grateful if you would subscribe, if you haven't yet, as subscriptions give us some insight into the impact of the podcast.

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Jeff Cobb: [00:22:36] We'd also be grateful if you would rate us on Apple Podcasts or wherever you listen, especially if you find the Leading Learning Podcast valuable. Those ratings and reviews help us show up when people search for content on leading a learning business.

Celisa Steele: [00:22:50] Lastly, please help us grow the Leading Learning community. At [leadinglearning.com/episode393](http://leadinglearning.com/episode393), there are links to find us on X, LinkedIn, and Facebook.

Jeff Cobb: [00:23:00] Thanks again, and see you next time on the Leading Learning Podcast.

*[music for this episode by DanoSongs, [www.danosongs.com](http://www.danosongs.com)]*

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