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Customer Context Converts

Boosting Retention and Revenue with Metadata

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What is payment metadata, anyway?

- For today's session, it's any type of data a merchant can add to a transaction message that unlocks some value for them
- Huge diversity of types, across applications and perspectives
- This diversity means:
 - Few standards
 - More obstacles to making use of it at all stages
 - More DIY than off-the-shelf solutions
 - Incremental wins require patience and perseverance
- Obstacles we'll explore:
 - Awareness, Strategy, Engineering, Processing, Observability, Analysis

Focus today on recurring payments

- To help monitor and optimize for LTV and retention across segments and acquisition channels
- Using first party data to increase conversion
- To make payment processing more effective
 - Reducing fraud and risk
 - Improving auth rates across the payments ecosystem

Session Goals

Strategies for increased revenue and retention with metadata:

- Increase awareness of opportunities and challenges over a range of metadata applications
- How to take practical steps towards applying these in your business

Questions and discussion

Questions will roughly move through the “lifecycle” of metadata projects, from conception to execution to analysis.

We’ll end with takeaway advice to get started with metadata opportunities for merchants with limited resources.

Key Takeaways

Metadata-driven revenue optimizations can be complex to implement effectively end-to-end, but it's worth it because there is lots of low-hanging fruit and room to grow bigger opportunities.

1. Understand your objectives with metadata
2. Set scope and expectations appropriately for your available resources and external constraints
3. Prioritize projects accordingly
4. Validate data, measure outcomes, and be prepared to adapt to learnings

Thank you

Don't forget to submit your session evaluation!

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