PURCHASE HISTORY AS A DECISION TOOL

Know when to deepen.
Know when to introduce.

Use purchase history to decide what to suggest next. Bring those choices to life through Movable Ink.

72%

CLIENT-REPORTED PURCHASE PATTERN

Reported whiskey-repeat pattern across the next three purchases

PERSONALIZATION THROUGH MOVABLE INK

BASELINE	NEXT PURCHASE 1	NEXT PURCHASE 2	NEXT PURCHASE 3	NEXT PURCHASE 4
Whiskey purchase	Repeat whiskey	Repeat whiskey	Repeat whiskey	Discovery hypothesis

Conceptual sequence: the fourth subsequent purchase is a possible discovery moment, not a universal trigger. Scotch is a whiskey subcategory.

WHAT I IMPLEMENTED

Start with the behavior worth explaining.

Jake’s whiskey example identified a 72% pattern of repeat whiskey purchases over the next three purchases. That finding informed a personalization strategy; it is a behavioral research result, not a reported increase in revenue.

THE CONFIRMED WORK

Connect insight to execution.

I conducted a stickiness analysis to understand repeat purchasing patterns. I implemented personalization through Movable Ink, then built upsell and cross-sell flows from the analysis.

Past choices can guide an offer without limiting it. A repeat whiskey buyer may want a better fit within a familiar style. They may also want to explore a related style.

THE INTERPRETATION BOUNDARY

Keep the example precise.

Trying Scotch on a fourth subsequent purchase is an example of discovery. It does not set a rule for every fourth purchase. Scotch is a type of whiskey, so the move stays within that broader family.

No commercial result, sample size or cohort window was supplied. Movable Ink is the confirmed personalization platform. Keeping insight, creative and delivery distinct makes the contribution of each layer easier to understand.

Client engagement: Jake Bauman. Product taxonomy context: R1.

AN ANALYTICAL FRAMEWORK

Sequence tells a different story than recency.

Order sequence tracks what happens from one purchase to the next. Recency tracks the time since a purchase. Both can help decide what to suggest, but they answer different questions.

DEFINE THE UNIT

What exactly repeats?

A useful analysis begins by specifying whether it follows customers, orders, items or categories. A multi-item order can contain both a familiar product and a discovery, so an exclusive label may hide the behavior under study.

For a new analysis, document the baseline purchase and which subsequent purchases are observed. Clarify whether repetition means at least one item in the category or an entire order devoted to it.

PROTECT THE COMPARISON

Who had time to repeat?

Give customers similar time to reach the later orders you want to study. A group tracked for years has more time to place a third order than one tracked for weeks.

Before calculating a rate, set the study window. Decide how to treat customers who lack enough follow-up time. These proposed rules make the result easier to interpret and compare.

Original analytical framework. The historical methodology was not supplied.

STRATEGIC FRAMEWORK

Define the distance between recommendations.

To judge how close two products are, define how you group them. ReserveBar lists Scotch within whiskey. Keep broad category interest separate from more specific product tastes.

LEVEL 01

Category

Whiskey can represent a broad area of interest. Repetition at this level does not identify a preferred style, brand, price point or use occasion. Avoid asking one broad label to explain all of those decisions.

LEVEL 02

Subcategory

Scotch sits inside whiskey. Introducing it can be framed as exploration within the broader interest, rather than a whiskey-to-non-whiskey switch. The relevant distance depends on what the customer previously bought.

LEVEL 03

Product context

Brand, expression and price can distinguish options within a category. A premium upgrade is a different proposition from discovering a new style. Explain the intended difference in the creative so the recommendation has a clear purpose.

Use consistent product levels when interpreting behavior. A broad repeat pattern and a specific product preference answer different questions and should lead to different decisions.

Brand taxonomy: R1. Original strategic framework.

ILLUSTRATIVE DECISION FRAMEWORK

Choose the commercial job deliberately.

Upsell and discovery have different jobs. This example uses signs of product interest and order history to choose an offer the team can explain.

AFFINITY + ORDER STAGE	RECOMMENDATION JOB	EVIDENCE TO CHECK
Repeated whiskey preference across observed orders	Consider an upgrade close to the established interest. Explain the relevant difference instead of treating a higher price as the entire proposition.	Confirm which products established the affinity and whether a premium recommendation fits the purchase context. One expensive order is not a permanent budget signal.
Broad affinity plus signs of adjacent interest	Introduce a credible discovery within the broader family. Scotch can be subcategory exploration within whiskey, depending on the previous purchases.	Check the nested taxonomy and the actual products involved. Preserve a recognizable connection while allowing the customer to explore.
Fourth subsequent purchase with limited new evidence	Treat discovery as a hypothesis, not an automatic trigger. A familiar recommendation or a useful fallback may still be more appropriate.	Check whether the analysis supports this specific moment. Order number alone does not establish readiness, intent or a preferred adjacent style.

Keep product availability and the intended use in view. The recommendation should remain understandable to the customer even when the underlying decision uses several signals.

Original decision framework. Client example: Jake Bauman. Taxonomy: R1.

SEPARATE DECISION, CREATIVE AND DELIVERY

Three layers. One coherent experience.

Give each layer a clear job. Then you can see what each contributes and which decision to revisit when results change.

LAYER 01

Decide

Order history guides the strategy. Decide whether to stay with a known interest, suggest an upgrade or offer something new. Define what happens when the evidence is weak.

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LAYER 02

Personalize

Movable Ink was the personalization platform. Its public guides show how data and business rules shape dynamic content. This layer turns a decision into a message that fits the customer.

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LAYER 03

Deliver

I built upsell and cross-sell flows to carry the messages into the customer journey. The delivery layer sets when and where customers receive them. The creative layer shapes what they see.

Keep the interfaces between layers explicit: inputs, decision, content and delivery should remain traceable to the intended customer experience.

Confirmed platform and flows: Jake Bauman. Platform capability: R2.

RESEARCH-INFORMED IMPLEMENTATION PRINCIPLES

The recommendation needs a useful explanation.

Movable Ink shows how data and rules can shape creative. Its examples use category interest, recent actions and fallback content in dynamic templates. These sources guide the design framework. They do not prove which integrations ReserveBar used.

CONTENT THAT EARNS ATTENTION

Explain why this choice fits.

A creative brief can name the product, explain why it fits and set the next action. For an upsell, show what makes the upgrade useful. For discovery, explain its link to a known interest.

Help customers judge the offer. Explain why it may suit them. Avoid claims that you know their tastes for certain.

CONTENT THAT SURVIVES UNCERTAINTY

Design the fallback deliberately.

Plan what to show when data is missing or a product sells out. Use a fallback when the evidence is too weak for a specific choice. It should still serve the message’s purpose.

For a new program, test tailored content and fallbacks to the same standard. Movable Ink describes several ways to use catalog data in creative. Choose a data source that can support the experience reliably.

Public capability and examples: R2, R3. Proposed creative framework.

A PROPOSED EXPERIMENT FRAMEWORK

Test relevance before claiming lift.

The 72% example describes what customers did. It does not prove that a recommendation led to more purchases. Test the messages built from that insight as a separate step.

SET THE EXPERIMENT

Compare eligible customers.

Define who qualifies for the strategy. Use that rule across the groups you compare. A holdout or suitable alternative can help test whether the offer changes behavior.

Set the test window and main measure in advance. One option is revenue per eligible customer. Track repeat purchases, product mix and margin alongside it. These are proposed measures, not ReserveBar results.

READ THE MECHANISM

Check what actually changed.

For an upsell, check whether customers buy a relevant upgrade. For discovery, check whether they try the related product area. In both cases, track the broader customer relationship.

Keep the analysis honest about other influences. Promotions, availability and changes in the eligible audience can affect the result. No controlled experiment or commercial lift was reported for this engagement, so neither appears as a case-study result.

Original evaluation framework. No historic test or financial outcome is claimed.

THOUGHT LEADERSHIP FROM THE CASE

Personalization should match evidence strength.

Use evidence to guide an offer you can explain. Stronger evidence supports a more specific choice. When the evidence is weak, choose a useful option that makes fewer assumptions.

PRINCIPLE 01

Preserve uncertainty

A gift may reflect the recipient's taste, not the buyer's. A one-off order may serve an occasion. Check these possibilities before treating one purchase as a lasting preference.

PRINCIPLE 02

Leave room to explore

Repeat preference is a useful starting point, not a permanent boundary. A system that only repeats familiar recommendations cannot learn much about adjacent interests. Give discovery a deliberate role and measure the response.

PRINCIPLE 03

Keep the layers legible

The decision, message and timing should work together. When results fall short, inspect each layer. This shows which part of the experience needs work.

ReserveBar shows how purchase patterns can guide a clear strategy and more relevant offers.

Original strategic synthesis. Public personalization context: R2–R4.

EVIDENCE, INTERPRETATION AND LIMITS

A behavioral case, with clear evidence boundaries.

Jake Bauman supplied the engagement details and the whiskey-repeat example. Official ReserveBar and Movable Ink material supports product taxonomy and platform capability. Firecrawl research was conducted on October 6, 2026.

R1 ReserveBar · Scotch collection

R2 Movable Ink · FAQs for data teams

R3 Movable Ink · Peak-season dynamic creative examples

R4 Movable Ink · The retail loyalty playbook

Brand identity · ReserveBar

WHAT IS ESTABLISHED

Jake conducted stickiness analysis, implemented personalization through Movable Ink and built upsell and cross-sell flows. His example reported 72% of whiskey buyers repeating whiskey over their next three purchases, with a possible later move toward Scotch.

WHAT REMAINS UNSPECIFIED

Sample size, dates, cohort window, denominator rules, exact taxonomy, data integrations and the sending platform were not supplied. No financial outcome was supplied. Frameworks, controls and proposed tests in these pages are strategic interpretation, not reconstructed historical execution.