



EBOOK

# Path to Personalization

The 9 keys to driving stronger relationships—one customer at a time.



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## INTRODUCTION

## The 9 keys to driving stronger relationships—one customer at a time.

Any marketer worth their weight in leads knows the benefits of personalization—and yet, a surprisingly large number of companies have not fully embraced this strategic tactic.

Typically, senior marketing professionals see personalization as a double-edged sword. On one hand, there's no doubting that consumers and end-users value personalized experiences and tailored recommendations across channels.

On the other hand, it's assumed that the prospect of building out those unique digital journeys by creating the content required and managing the data to fuel the entire process seems far too complex.

The good news? Industry-leading brands are showing that the opposite is true.



## The path to personalization for enterprises at a glance

Since the turn of the 21st Century, the flame of brand loyalty has wavered in the winds of the internet. According to a [Forbes Insight study](#), only 1 in 4 business leaders believes customers are loyal to brands, while 62% say the concept of loyalty is now close to obsolete. The study, which surveyed companies with at least \$1 billion in annual revenue, also revealed that developing a customer-focused environment and delivering personalized marketing has become a strategic imperative.

The reason is simple: customers now value the experience more than they value the brand providing it. If your competitor offers a faster, more convenient, and more personalized customer experience, you can't rely on the aging concept of brand loyalty to rescue you. We as marketers all have to adjust to the new reality that brand loyalty is dead.

### Context is queen

If content is king, then context is certainly queen. Delivering tailored experiences at the right time is the key difference between simple personalization and enterprise personalization at scale—and consumers can tell the difference.

Marketers often personalize emails and web content, but very few deliver a continuous experience across channels by displaying personalized content at the right time in the customer's journey, powered by the contextual information associated with the end-user. For instance, by suggesting sneaker cleaning products after a sneaker purchase, or by altering messaging and product suggestions based on the consumer's device, the weather they're experiencing, or local events.

And no, contextualizing personalized content isn't another luxury. In fact, an Accenture-led study shows that [81% of consumers](#) want brands to understand them better, and they want brands to know when, and when not, to approach them.

### Journeys, not moments

With contextualized content in place, you can finally begin constructing the customer journey.



## INSIGHT

**It's important to note that the four key stages (on the right) could happen over a period of months, weeks, days—or minutes. Consumers switch between devices swiftly and without hesitation, and if they have already carried out research in the past, it's possible they could become a customer rapidly; particularly in a B2C environment. Hence, it's vital that your personalization strategy, and the technology that enables it, works in real time and with the required agility to understand and react.**

Forward-thinking enterprises don't see personalization as a series of disconnected moments for the end-user, but as a continuous lifetime journey. For instance, using the customer's name every so often is useful, but the most it will do is give the customer a few moments of pseudo-personalization.

By combining context marketing with an omnichannel presence, a brand can construct a customer journey map consisting of multiple stages. Typically, industry best practice dictates that you segment the customer journey into the following four key stages:

- **Need:** Every customer starts their journey with a need. For example, they want to purchase a new car.
- **Research:** The customer looks broadly at different brands, models, price ranges, and online reviews along the way. Over a period of days, weeks, or even months, they slowly narrow down their options.
- **Decision:** They make a selection from a short list of possible brands, factoring in past experiences, reviews, and other online information.
- **Customer:** They end their buyer journey by purchasing a car. Then a new chapter in the journey begins, with the onus on the car company to provide a personalized onboarding and customer service experience.

A strong personalization campaign will have personalized content custom-made for each stage of the customer journey, with further tailoring of that content happening in line with the individual customer's persona and past behavior.

## Going omnichannel

Today's customers are expecting to be able to engage with you on whatever channel they want, whenever they want. If that wasn't difficult enough, they expect you to remember who they are and personalize their buying experience accordingly. And if you don't do it, you can bet your competitors already are or are currently working on it.

This is where omnichannel personalization comes in. **Omnichannel personalization** is the art of developing a consistent and continuous personalized experience that encompasses all digital channels and touchpoints. This includes website content, mobile content, social media, email, smart speakers, wearable technology, digital signage, and other IoT devices. The goal is not just to enable the end-user to access your brand through various touchpoints, but to empower them to switch between any touchpoint at any stage in their journey without a hiccup – and without a break in personalization.

This strategy has the ability to collect information across the channels, amalgamate this information under a single unique ID that is associated with the user, and then it utilizes this information to deploy the most relevant and contextual experience to the end-user, no matter where the interaction is taking place.

When you consider that **64% of consumers** are willing to pay for seamless customer experiences, the value of omnichannel personalization becomes clear.

# The 9 steps on the path to personalization

While personalization isn't a switch you flip on or off, there is a straightforward process you can follow to launch a future-proof personalization program that's data-driven, generates brand loyalty, increases conversion, and is ready for any new device that emerges on the market. This guide offers a comprehensive outline to help you differentiate your digital experience. Depending on your industry, the stage of your customer's journey and potential audiences, some of these steps will be more important than others. All the essential ingredients to help you differentiate from your competition. Now, let's get started!

## 01

### Establish your team and objectives



Ideally a strong personalization strategy is built using the expertise of select teammates. The goal is to leverage their unique skills and establish a framework that enhances the customer experience by serving up the most relevant content. While a broad team is not always possible, the ideal personalization team for enterprises consists of seven team members, who may or may not have a team beneath them:

- **Executive Sponsor:** An overall advocate for resources, leadership commitment, and cross-organizational collaboration
- **CX Lead:** Leads overall management of the personalization program
- **Digital Strategist:** Translates organization's overall strategy into CX strategy and tactics
- **Content Marketer:** Leads journey-aligned content creation, tactics, and experience flows across channels
- **Marketing Technologist:** Oversees implementation tactics and integration with third-party tools and systems
- **UX Designer:** Responsible for overall UX and IA
- **Digital Analyst:** Provides insights and recommendations based on analytical data

Goals and engagement value scales pave the way for personalization. One of the first steps ahead of any personalization should be creating the engagement value scale, which includes KPIs such as customer lifetime value and value per visit – both of which are vital when reporting on the success (or failure) of a personalization campaign.

Next, you'll want to outline a strategic objectives framework. This framework should outline the business and marketing objectives that map to digital goals that represent business value. Those digital goals should drive the personalizing strategy they represent – what, why, and for whom you're personalizing content.



## 02

### Outline audience segments



A **segment** is a group of visitors to your site who have something in common. Personalizing content toward segments of your audience is a great way to target users with content that's relevant to them. Segments should be identified and prioritized by their ability to drive business value and their size.

A **persona** (also known as a buyer persona) is one type of segment. A persona is a fictional yet data-driven representation of your ideal customer. A buyer persona includes the customer's demographics, age, location, preferences, behavior patterns, motivations, and goals. A persona is designed to represent a segment of your target audience, and thus, it's wise to build a small range of personas to ensure you capture your entire target audience.

Alongside personas, marketers can also personalize based on **historical behavior** such as goal conversions, downloads, and form submissions. Or, they could leverage the user's **contextual state**, like the campaign source, time of day, or the number of times they've visited the website or application. In Sitecore, there are dozens of out-of-the-box rules available for segmentation and, therefore, personalization.

With your set of segments in place, you can begin creating content that's tailored for each segment. Once that's done, you have the content required to personalize experiences for whoever matches the criteria of the segments you built.

Sitecore allows you to predefine personas and create content for each segment of your target market.



## 03

### Map the customer journey



With your personas in place, it's time to map out the customer journey. That way, you'll know at what stages to deliver your personalized content. Your content should be segmented by persona, but also by customer journey stages.

For instance, you won't want to try and up-sell a customer with sidebar content before they've proceeded to checkout. Nor would you want to present a customer who's at checkout with a brand new and totally unrelated offer. Again, context marketing plays a role, and as you can see, it's hard to align content with context without a customer journey map.

Typically, a customer journey map consists of the four stages mentioned previously; Need, Research, Decision, Customer. You may need to adapt or extend your customer journeys to suit your industry or website. Moreover, you'll also need to decide what these stages look like across channels. For instance, how will you know when a customer moves from the research stage to the decision stage when they're using a smart speaker?

We recommend mapping out customer journeys for each major channel, and figure out how those journeys overlap, so personalization can continue when the end-user switches from one device or channel to another.

## 04

### Create workflows, then test, test and test again



You won't get personalization "right" on the first attempt. And even if you get lucky and do get it right initially, new products, seasons, buyer needs, and changes in consumer taste means this is going to be an iterative process. The aim should always be to test and refine your personas and corresponding content in order to raise conversion rates.



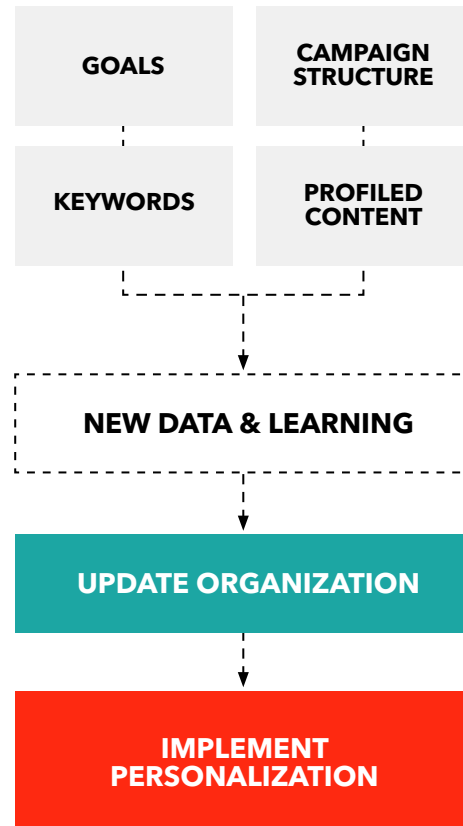


The diagram below illustrates the ideal workflow for launching, maturing, and testing a personalization program

**1.**  
Start by identifying, labeling,  
and organizing, goals, campaign  
structure, keywords and profiled  
content based on the data available.

**2.**  
Based on new data and learning  
over time, update your learning  
and organization.

**3.**  
Implement dynamic personalization  
based on updated findings.



05

## Empower marketers to quickly create, distribute and iterate content



Content is the fuel that powers personalization. If marketers are hindered by technology (or a lack thereof), the engine grinds to a halt. A documented content strategy should be your first step, and it should instruct marketers and content creators on how to craft content for each of your personas. Factors such as the persona's technical knowledge or interests, should dictate the tone and language of the content being created.



Marketers will need a hospitable environment to write, collaborate on, and preview content before it goes live. They'll also need the ability to dictate what channels will benefit from which piece of content, and they should also be able to modify how that content is presented across channels. Additionally, your technology stack should allow marketers to measure and test content, and then iterate published content in line with new data.

**Sitecore's Experience Optimization** capabilities allow marketers to test content in a variety of ways, including A/B testing, multivariate testing and personalization testing.

## 06

### Leverage geolocation and localization



With a geolocation service, you can get information about a customer's country, state, metro area, city, and ZIP code. With such information, you can personalize content based on the consumer's location, which opens up a wide range of possibilities.

For instance, you can recommend local outlets or serve content that's in line with the weather they're currently experiencing. You can even use the name of their town in your messaging to make your content truly localized.

## 07

### Centralize & leverage third-party data sources



Like most enterprise companies, you're likely collecting data from a wide range of sources and using an array of tools to carry out marketing, sales, and customer service operations. Moreover, as we move deeper into the IoT era, the number of devices you can use to harness even more customer data is increasing. For a truly data-driven personalization program, you'll need to centralize all that data, integrate with all those tools, and ensure your customer data can be distributed to any external tool or channel; all to establish the following:



- **Detailed Personas:** The more data you have, the more detailed and granular you can get with your personas. With a higher quantity of granular personas, your content can be even more targeted.
- **Accurate Segmentation:** With more data, you can be sure that your audience is segmented under the correct personas, and are therefore receiving the most relevant content.
- **Smoother Marketing Operations:** A fragmented technology stack helps nobody. When a single platform can act as your content hub, where you can connect all external systems together, your marketing operations simplify overnight.
- **Identity Management:** When delivering personalized experiences at scale, you need to simplify the process of managing your consumer's personalized data. With modern authentication, you can create a full view of your user and access the most relevant information in a single location.

## 08

### Go beyond your website



Your customers are on the go. They're commuting to work, walking on the street, passing through the airport, strolling past your store, or driving an Alexa-enabled car. Their attention span is also getting shorter and more fragmented, as every new device that emerges on the market divides their time yet again. The solution? An **omnichannel presence**.

**IoT** devices such as smart speakers, digital signage and virtual reality headsets are already changing the average customer experience. With a marketer-friendly headless CMS, your brand can finally go beyond its website, and into the exciting realm of the Internet of Things.

While a device-centric approach to personalization is great, some brands fail to sufficiently consider what customers are actually doing when they use their phones or tablets. Instead of just presenting a responsive site to your customers, take full advantage of their devices by using insights about location or venue to provide the most relevant experience.

Moreover, you need to consider that the mood of the end user changes depending on the device they're using. For instance, because of the smaller screen and the fact they may be on the move, a consumer browsing for information about your service wants it shorter and snappier when they're on a mobile device compared to when they're browsing on a desktop.



# 09

## Make personalization a core business priority



Last but certainly not least, personalization should never be an afterthought. It should be the core focus of your overall marketing program right from the very beginning. Start with a strategic initiative early on, when implementing your personalization strategy, so that it eventually becomes a routine practice later down the line.

Your personalization strategy should be deeply ingrained into all your marketing and sales funnels. That means producing content purposely targeted for different personas, preparing customized CTAs, and showing or hiding content in line with factors such as end-user location, age, or demographic.

Remember, you aren't just tacking on functionality to your website, you're building a new and improved way to engage with your customers across the world, giving them content that's tailored for them throughout their journey.

### Next steps

The importance of having a personalization strategy in place can't be emphasized enough. Not only does it help your brand to stay relevant and competitive in the modern day, but it also prepares you for the future.

The harsh reality that brands must face is that if you are not able to do basics in personalization right now, then you won't be ready for the more advance personalization techniques later down the line.

We're already seeing more people using voice search and shopping bots, and these people are expecting a personalized experience through these channels. And as more companies are trying to remove any latency from their personalization process, they're investing in machine learning and consolidated into platforms like Sitecore. Otherwise, your brand will continue to fall further behind the competition the longer you delay implementing a personalization strategy.

Marketers can no longer afford to view personalization as a pipe dream. The behavior of consumers across industries indicates that end users don't just expect personalization – they demand it.







## Why Sitecore

At Sitecore, our team of experts has been building enterprise software for more than 20 years, so we've pretty much seen it all.

As the most flexible and connected digital experience platform, we empower the world's biggest brands to create truly personal relationships with their customers by unifying content, commerce and data with a built-in superpower – always-on personalization. As consumers have evolved to buying experiences, not just products, brands can't afford to stay stagnant and still be competitive.

Partnering with Sitecore provides you with industry-leading tools and unmatched support that will allow you to build brand loyalty with your customers like never before.

Sitecore's ability to personalize digital experiences is second to none. We learn from all interactions – online, offline and anonymous – and we apply that data and insight in real time across channels at scale. No one else can do this—it's just one of our key differentiators. Let's talk about the others. For more information, follow us at [@sitecore on Twitter](#) and [Instagram](#) or [visit sitecore.com](#).

**Macaw is a dedicated Sitecore Platinum Implementation Partner**

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