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YOU KNOW YOU NEED TO PERSONALIZE, NOW WHAT?

How to Take a Crawl-Walk-Run Approach for Personalization Success

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Eric Fullerton is a product marketing leader for Acquia's personalization and journey orchestration products. Eric's passion for solving for the future of digital comes from living it firsthand for the past ten years. Eric has navigated the divide between people, process, and technology at small organizations and global tech giants alike as he continues his journey to excite employees and engage customers through the power of digital marketing.

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TABLE OF CONTENTS

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INTRODUCTION

You've seen the numbers. You've read the articles. Personalization is top of mind for marketing professionals around the globe, and for good reason.

Delivering customized experiences based on a visitors' unique characteristics and browsing behavior has been shown – time and time again – to improve website engagement metrics and increase conversion rates.

Although it's great that marketers are embracing and getting excited about personalization, it's not all sunshine and rainbows. In fact, I've got some bad news for you. Personalization. Isn't. Easy.

We can all agree it would be amazing if there was an automatic, turnkey, personalize-with-the-flip-of-a-switch solution out there, but sadly, that's simply not the case. Doing personalization the right way is an investment in time, resources, content, and technology.

And doing it right is the only way to deliver results that drive your customer experience, and your business, forward.

PERSONALIZATION. ISN'T. EASY.

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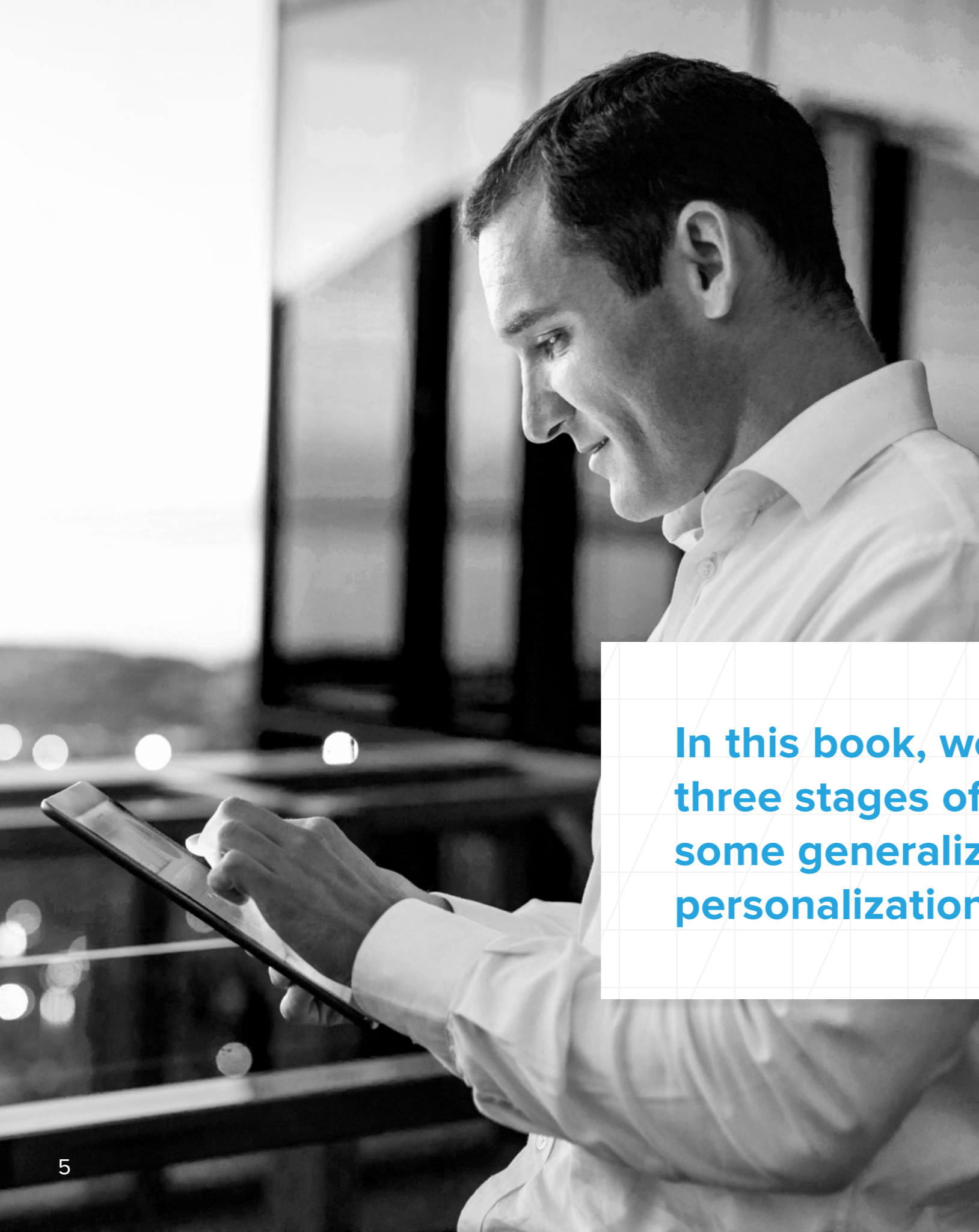
I want to briefly highlight the most important aspect of personalization: data. It's at the core of everything you do and every personalization flows through it. It's the first step to any effective personalization strategy and having good data is a requirement to doing personalization well. You cannot do personalization without good data.

The secret sauce to help turn personalization from theory into reality is a three-step methodology we've taken to calling the "crawl-walk-run" approach.

In this book, we look at each of the three stages of personalization and some generalized use cases; what personalization looks like in reality.

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THE CRAWL-WALK-RUN APPROACH

"CRAWL"

personalizations are ones you can start with immediately from a content and data standpoint. These are generally low effort (meaning general, easily collected data and personalizations that can be ongoing), of varying impact, and with fast results.

Some examples of crawl personalizations are:

GEOLOCATION

For those visiting the site from a specific city, personalize a section of the homepage with information or registration for a local event that you are sponsoring or attending in that city.

MARKETING CAMPAIGNS

For those who received an email with a specific UTM code, if they click on the link to the email create a consistent experience across channels by personalizing the homepage to match the content in the email.

VISIT FREQUENCY

First-time visitors will see the "about us" image and link prominently displayed above the fold, while visitors who have been to the site before will not see any "about us" information above the fold. For visitors who have returned to the site multiple times in a short window you could offer an opportunity sign up to a newsletter or to receive a piece of popular content.

DEVICE TYPE

For mobile users, you could evaluate your analytics to see which content is most popular with mobile users and provide them with that content on the homepage.

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"WALK"

personalizations will usually require additional content and more data collection for further defined segments, These are medium to high effort (data that may require multiple visits and additional content creation), with medium to high impact.

Some examples of walk personalizations are:

BROWSING BEHAVIOR

Tag content for certain sections of the site like the blog, videos, and other webpages that align to a specific segment you want to track. Then when visitors interact with that content more than others, deliver that same relevant content to them on sections the homepage and interior pages no matter where they browse.

PAGES VIEWED

Here you can contextualize the site based on multiple views. If a visitor has looked at awareness type content multiple times in a 30-day period, you could serve them conversion content on their next visit. Or if someone has visited a page about a specific topic several times, you could serve them new content that's been created on that topic when they visit the homepage.

COMPLETED EVENTS

For visitors who have taken an action (could be signing up for a webinar, attending an event, or joining a newsletter), you can serve them reminders about that event, content or information about a similar or related event, or show them an action/ ask related to the next stage of the marketing funnel.

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"RUN"

personalizations will require additional content, more personalization events, and more data for further defined segments.

They are high effort (requiring data collection and integration from other systems, moderate to extensive content creation, and more research and manpower to build and execute rules) with high impact during an extended period of time.

Some examples of run personalizations are:

INTEGRATION WITH CRM

Leverage data from tools like Marketo or Eloqua and personalize content on sites or mobile apps based on their segment IDs or other identifiers in those systems.

CROSS-CHANNEL

Fulfilling an order on a mobile website and then receiving a discount or free delivery coupon via email or next time you log onto the mobile app.

COMBINATION OF MULTIPLE CRAWL PERSONALIZATIONS

Show regional content to visitors from that region who arrived at the site by clicking on a PPC online ad.
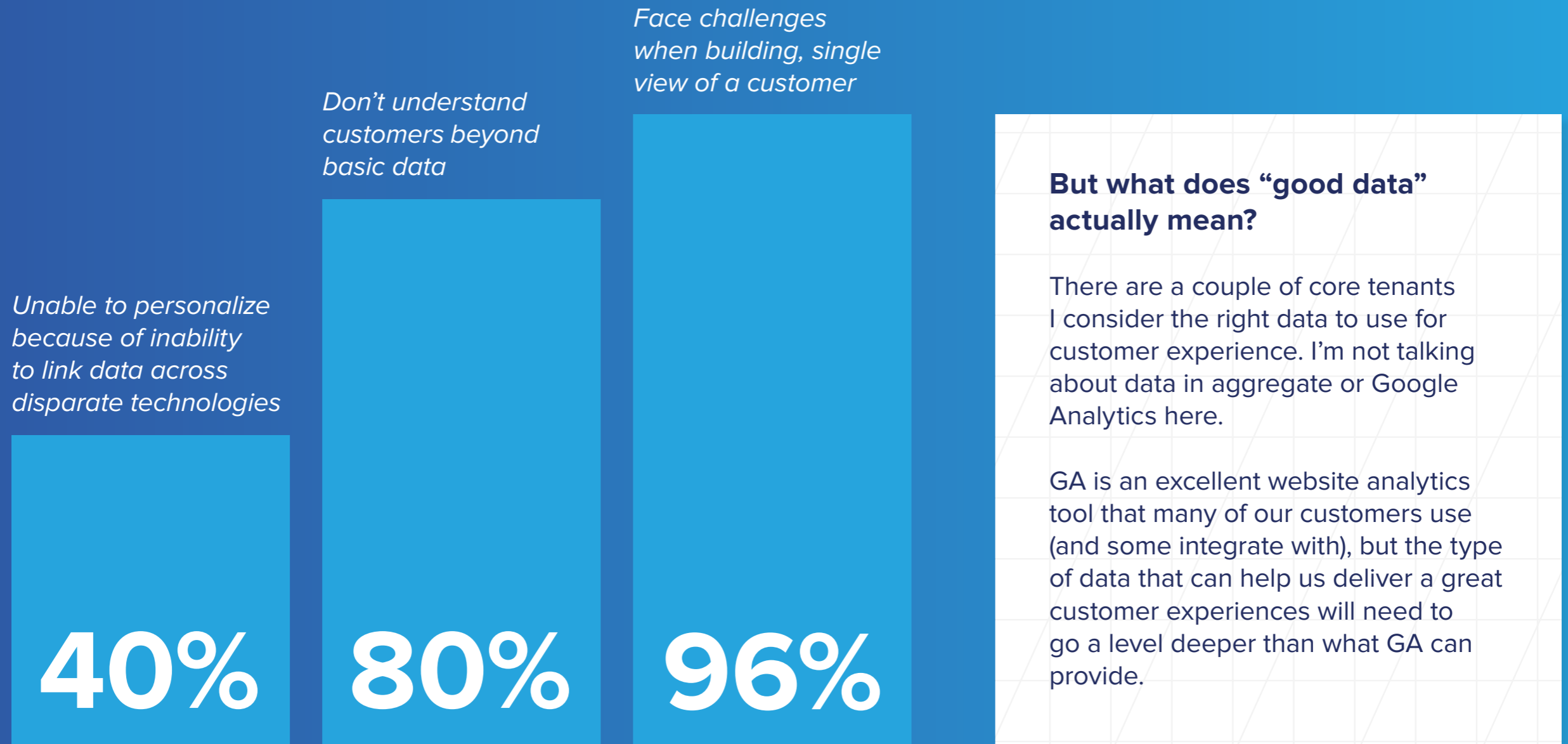
So there you have it — the crawl-walk-run methodology for successful personalization, served with a side of example tactics that we've seen organizations deploy.

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CRAWL: IT STARTS WITH DATA

Data is the most important aspect of personalization.

It's at the core of everything you do and every personalization flows through it. It's the first step to any effective personalization strategy and having good data is a requirement to doing personalization well.

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PERSONALIZATION IS A DATA CHALLENGE FOR MARKETERS

Face challenges when building, single view of a customer

Don't understand customers beyond basic data

Unable to personalize because of inability to link data across disparate technologies

40%

80%

96%

But what does "good data" actually mean?

There are a couple of core tenants I consider the right data to use for customer experience. I'm not talking about data in aggregate or Google Analytics here.

GA is an excellent website analytics tool that many of our customers use (and some integrate with), but the type of data that can help us deliver a great customer experiences will need to go a level deeper than what GA can provide.

eMarketer 2015 "Marketers Stuck on Basic Data for Personalization"

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BUILDING A 360 CUSTOMER PROFILE

True visibility into your visitors requires building unique, holistic user profiles for each individual. And this means a profile that is constantly growing and aggregating customer data in as visitors engage in with your site. A 360 customer profile also requires a few other components.

Discover Preferences, Not Just Characteristics

User characteristics, like geolocation, device type, operating system, or new or returning visitor, are critical components to building a 360 customer profile.

But behavioral data — actually understanding visitor preferences, specifically around which content they engage with most and like, which product they read most about, or which travel destination they research the most — is that next level of insight that's required for building a 360 customer profile that allows you deliver the most relevant experience possible to your users.

Integration with Your Stack (Connectors, APIs and So On)

We've all seen Scott Brinker's graphic displaying the enormity of marketing technology available today — and it's only getting bigger.

When thinking about the right data for customer experience, the critical piece is ensuring the data collection technology you use can integrate and connect with other existing tools, and not something that will require a rip and replace or create even more data silos.

Additionally, by connecting your website visitor data and segments with other tech sources, you are creating an even more cohesive view of your customers to create that 360 profile I mentioned above.

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INTELLIGENT ACTION

Too often data collection is in service of an existing business goal; from proving out a hypothesis to justifying a business objective or passion project.

Instead, allow the data you are collecting, profiles you are building, and segments you are creating to teach you things about your visitors and your business.

Some next-level insights our customers have been able to identify to drive their digital experience forward are:

A travel company discovers its most popular travel destinations for its website.

A tech company understands which industries visitors are coming from.

An insurance company learns which type of plan most visitors are interested in.

A B2B organization learns which stage of the buying funnel each visitor is at.

A pharmaceutical company finds out which segment of visitors engages with the most content.

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I've said it before and I'll keep saying it: The foundation of website personalization is data. But once you've spent time to get the right data in place, build your user profiles, and create segments that are relevant to your business ... what's next? How do you turn that data into customized digital experiences that intrigue your visitors and your customers coming back?

The data you've collected in the early stages of your digital personalization journey means you have insight into your visitors beyond just explicit characteristics like geolocation or device type. You also have an understanding and visibility into your audiences implicit preferences, like content and experiences that drive them to action.

Knowing these things, your most active segments, the most common geolocations, and what their preferred topics or products are means your roadmap is right in front of you.

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LEARNING HOW TO 'WALK'

Personalization can't be done all at once. There's no instant solution; it needs to be ramped up over time. We refer to it as the crawl-walk-run approach.

Even within the "walk" stage of crawl-walk-run, personalization is a process. You'll see a lot of marketing speak and big talk around one to one personalized experiences, but the reality is most organizations aren't there yet. And that's OK.

The real objective of personalization for most organizations today is to move away from the generic, one-size-fits-all experiences, and it can take time to do so.

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Keep in mind that you want to continue moving to targeting and delivering experience to smaller groups, so it looks like:

ONE TO ALL → **ONE TO MANY** → **ONE TO SOME** → **ONE TO FEW** → **ONE TO ONE**

That's the goal.

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When you enter the "walk" phase, you can start slowly, focusing on lower effort and low to medium impact activities, such as:

LOCATION-BASED PERSONALIZATIONS

A retail store promoting top five fashions for fall in the Northeast but continuing to show most popular bathing suits in California.

DEVICE-SPECIFIC PERSONALIZATIONS

A university displaying a map to mobile users vs. a virtual tour to desktop users.

VISITOR-FREQUENCY PERSONALIZATIONS

Delivering newsletter sign up promotion to a first-time visitor to capture email, or directing them to download an app for a different user experience.

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Once you've begun to understand what personalizations see positive results and have built out additional content based on active segments, popular locations, and other data you are collecting, you can begin to focus on higher effort, higher impact personalizations such as:

VIEWED PAGE X TIMES

A B2B technology company shows conversion content to visitors who have looked at three pieces of awareness content.

EVENT-BASED/FUNNEL-BASED

A nonprofit organization promotes attending a local meetup after visitors have signed up for their email newsletter.

INITIAL AND INTERMEDIATE USE CASES

Conversion video to a mobile visitor who has viewed awareness content more than three times in 30 days.

BROWSING BEHAVIOR

A tourism company shows promotions and content for European vacations rather than Asian because a visitor has viewed Top 10 cities in Europe and five off-the-beaten-path European vacations content.

COMBINED USE CASES

Show B2B case studies to visitors from US who came through a B2B PPC ad.

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PERSONALIZATION IN ACTION: TENNESSEE DEPARTMENT OF TOURISM

I like to use Tennessee Department of Tourism as an example because not only have they done this really well, their use case is a really tangible one. They are learning more about their visitors each time they come to the site, segmenting users by region of interest and experiences.

When a visitor comes to their site, they engage with content relevant to Memphis, Nashville, or Chattanooga, and receive personalized content based on that behavior in real-time as they continue to engage. When they touch on experiences, like food, history, music, or outdoors, that's another component they are segmented on, as well as any

derivations of those two primary segments, like food in Nashville, music in Memphis, or history in Gatlinburg.
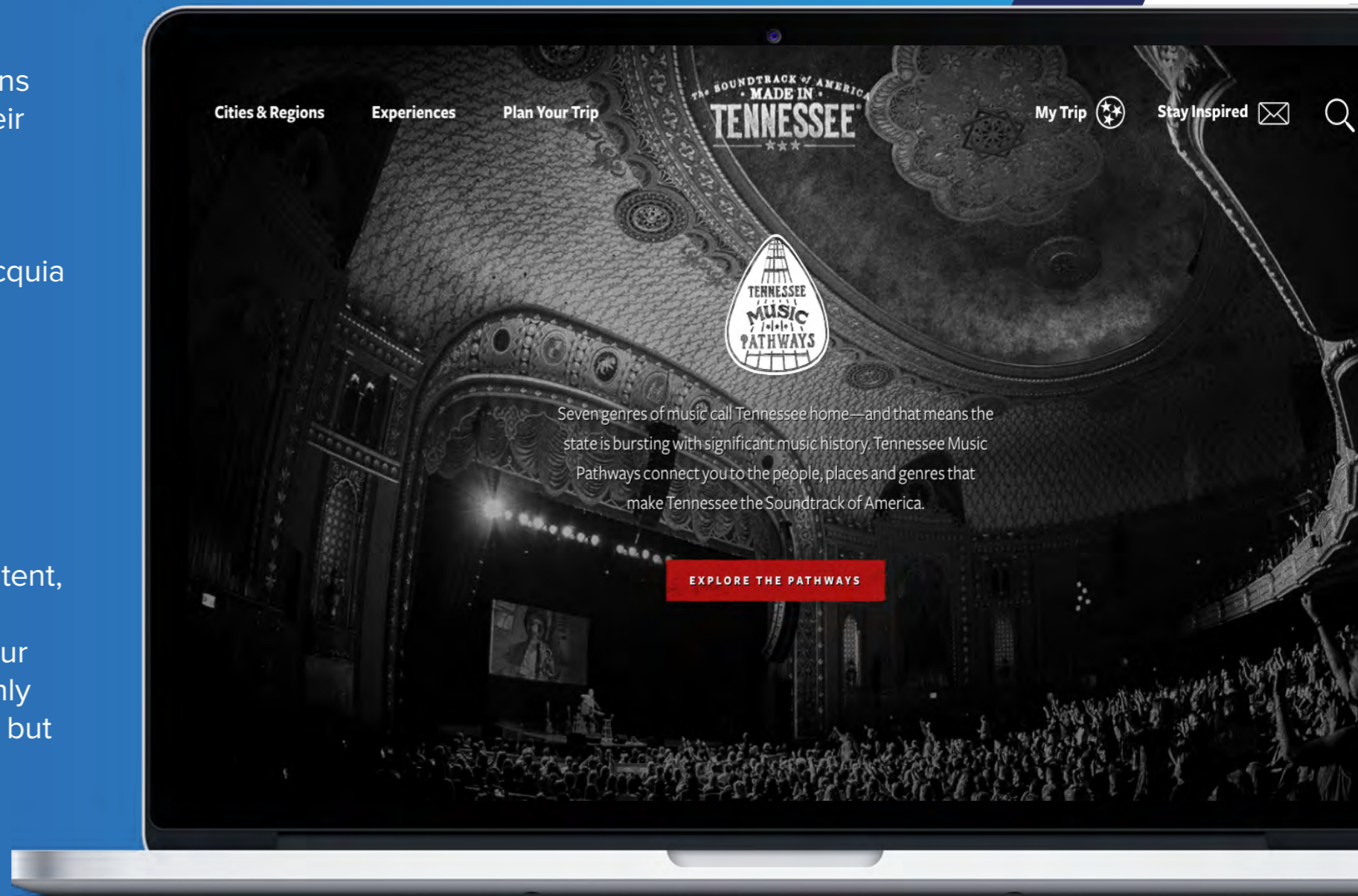
By segmenting on behavioral interest they can also incorporate device type or location data, segmenting their user base into much more specific groups they can continually target and test content against.

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In addition to delivering experiences that have increased engagement on their site, Tennessee Tourism also knows more about its website visitors, and can use this knowledge of most popular locations or experiences to continually inform their content and personalization strategy.

Read the full Tennessee Tourism case study here, or learn more about how Acquia Personalization can help you to deliver data-first personalizations to your most important customers.

One final note, as you transition from "walk" to "run," you'll have an inherent understanding and visibility into your audience's implicit preferences like content, experiences and so on, resulting in a completed action. Keep in mind that your goal is to use your technology to not only move your customers along the funnel, but deliver great experiences every step of the way.

Cities & Regions   Experiences   Plan Your Trip   THE SOUNDTRACK of AMERICA · MADE IN · TENNESSEE ★★★   My Trip   Stay Inspired

TENNESSEE MUSIC PATHWAYS

Seven genres of music call Tennessee home—and that means the state is bursting with significant music history. Tennessee Music Pathways connect you to the people, places and genres that make Tennessee the Soundtrack of America.

EXPLORE THE PATHWAYS

RUN WITH CROSS-CHANNEL PERSONALIZATION

You've done the work, you've understood your customers better than you previously thought possible, and based on your new insight, started delivering relevant experiences on your website.

You've tested successfully (and maybe not so successfully, too), seen increased engagement and metrics for your most important visitors. What's next? Embracing the entire customer journey. While personalizing on your website is a great first step, it limits you to delivering engaging experiences only to those who choose to visit your site.

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The next step, delivering these great experiences to all your prospects and customers, even on channels you don't own.

It's only when you look at the customer journey as a whole that you can achieve the customer experience required to acquire, convert, and grow your business. The climate has never been more competitive; customer expectations are being led by the tech giants and big budget businesses.

The entire customer lifecycle means thinking beyond the point of sale and even beyond the traditional marketing funnel. It's a cyclical process, beginning with awareness and moving to consideration, conversion, growth, and advocacy. At each of these touchpoints, both online and offline, brands have an opportunity to reach customers with data-driven, personalized experiences that increase their engagement and their loyalty.

That sounds great, but what does it actually take to do this? The ability to not only map and ideate a customer journey but also the ability to act on it, automatically ... not just on your website, but everywhere your prospect or customer may be.

And admittedly, this is a lofty goal. But for organizations ready to invest in the future of customer experience, it's a requirement. Let's dig deeper into what this actually means.

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Organizations looking to embrace the customer journey model must be able to:

Unify their martech and adtech touchpoints.	**Consolidate customer data for 1:1 or 1 to few engagement.**	**Trigger the right content at the right time, automatically.**

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By doing this, you can deliver an experience to your customers that will be:

CONNECTED AT EVERY TOUCHPOINT

Just like with data collection and personalization, you need to be connected, here more than ever, in terms of communicating and connecting across your technology stack to listen and respond to your customers.

CONTEXTUAL TO A VISITOR'S LAST STEP

As an extension of personalization, you also need to be delivering data first journeys based on the segments and audiences you build out when you collected all your rich customer data.

UNDERSTAND AND PREDICT WHAT THE NEXT BEST ACTION SHOULD BE

You need to not only be able to listen across all these different channels, but also deliver what we call the "next best action" that's determined by each unique user profile in terms of their interests, channel of choice, and stage of the buying cycle.

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Delivering a connected customer experience requires many of the things I've touched on previously: being data-first, segment based, leveraging connectors, thinking beyond A/B testing and leveraging artificial intelligence (AI) when it makes sense to do so. But it also means much, much more.

Start small; collect rich data on your users – beyond simple clicks – and segment them into key demographics. Use that knowledge gleaned during the data collection phase to deliver content experiences that drive consumers to engage and convert with your brand while increasing their adoption and loyalty.

This strategy driven, prescriptive approach will be easiest to manage for customers and is what makes the crawl-walk-run approach to connected customer experiences so successful.

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CONCLUSION

In the early days of web CMS, it was all about the brand; one corporate brand site, one agency of record.

Email marketing was the ONLY way to go, banner advertising ran rampant, and customer data was just a twinkle in a marketer's eye. Web analytics gave us some insight, but nothing very actionable. There was nothing to connect with the individual in a consistent, personalized basis.

Fast-forward to today, where we live in a "customer-empowered" world. It makes sense in many ways; customers are hyper-connected and have unprecedented access to content including instant feedback from fellow customers via social media and/or reviews. Nearly every purchase decision is highly influenced in some way.

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With so much competition, there is no need to remain loyal to any brand; unless of course, a brand is providing the exceptional service and quality every interaction. Without it, loyalty does not exist.

This has caused digital marketing has to rapidly expand, explode even, if you're feeling dramatic. Organizations have tens, hundreds, even thousands of sites and often work with multiple agencies.

There are ad-blockers and regulatory issues like GDPR keeping even savvy marketers up at night. Customer journey mapping and artificial intelligence aren't futuristic ideas; they're real things that are being utilized here and now. Omnichannel adds yet another layer of complexity on top of it all. So what's a marketer to do?

The best way to deliver the level of experience that customers demand is by showcasing the right content, offer or action at every stage of their journey, on the channels they populate. This connected customer experience is the "north star" for many organizations today, for good reason. As customer experience continues to be critical to engage consumers with sky-high expectations, delivering cohesive experiences across channels owned and not will be the new normal.

Most organizations won't get there overnight, or even over a few quarters ... and that's OK. By taking a gradual approach, with a foundation built on real, actionable user data, you are setting your organization up for personalization success not just now, but in the future. The crawl-walk-run approach seems simplistic, but in reality, it's one of the most proven ways to manage large scale personalization operations that positively impact your bottom line.

Need help getting started? We're here to help you every step of the way. For more information on how Acquia can assist with personalization across the customer journey, contact sales@acquia.com.

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