



ACQUIA
PERSONALIZATION



THE STATE OF PERSONALIZATION TODAY

(And what we are doing to fix it)

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Personalization in Perspective

SECTION 1

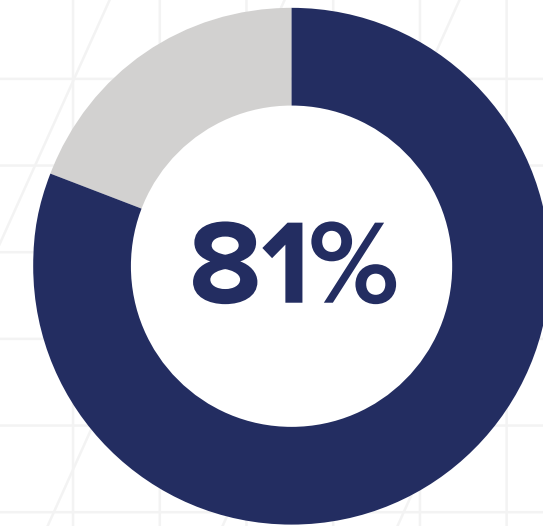


Personalization in Perspective

Digital marketing has undergone a profound shift. Today, the customer experience — no longer the product or service offered — is at the center of all marketing initiatives. [A recent Gartner survey](#) shows that 81% of marketing leaders say they expect to be competing mostly or completely on the basis of customer experience. The problem? These customers are increasingly difficult to please. Many not only expect but demand contextualized interactions, seamless experiences across channels and anytime, anywhere access to content and services.

No matter the industry, every organization wants to deliver a better experience for their customers. But how? Your customer base is growing and more tech-savvy than ever before. Customers also have shorter attention spans, are less loyal and have higher expectations for performance and experience. How do you make them feel welcome and unique not just the first time they visit your site but throughout their customer journey?

There's no one-click solution to revamp your digital marketing strategy — being customer-first takes time and effort. But there are some steps you can follow to enhance the experience for your visitors every time they visit, increasing their engagement and, by extension, their loyalty. With the right preparation and a little hard work, any organization can put into practice one of the most proven, effective marketing techniques of all: personalization.



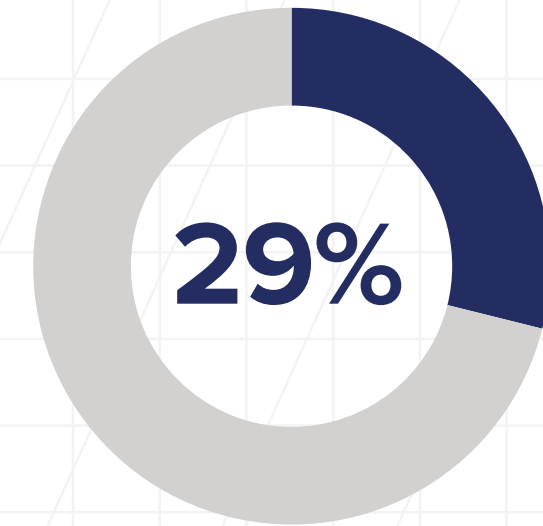
Of marketing leaders say they expect to be competing mostly or completely on the basis of customer experience¹

Digital Personalization Defined

There are tried and true facts about customer experience that extend far beyond the digital space. Think of your favorite coffee shop, neighborhood bar or restaurant, or perhaps even your barber or hairstylist. Your barista might remember how you like your coffee (and maybe start getting it prepared for you when you walk in). Your barber probably knows how you like to have your hair cut. Based on your tastes, a server could likely intuit whether or not you might be interested in the special of the day.

Across the board, people like to feel appreciated and understood. They want to experience a personal connection, no matter who they are interacting with. In the digital age, however, such connections are difficult to create, especially when you're trying to create them for tens or hundreds of thousands of people visiting a site or downloading an app.

In order to address the customer experience challenge, organizations turn to technology. [Gartner's 2018-2019 CMO Spend Survey](#) found that Martech took up 29% of the average CMO's budget, more than either People (24%) or Digital Agencies (23%). Personalization tools in particular help improve CX by using the power of data to customize digital experiences around a group's — or specific user's — interests, behavior or favorite topics. When used properly, these tools help customers feel more directly connected to your brand and less like a generic, nameless customer.



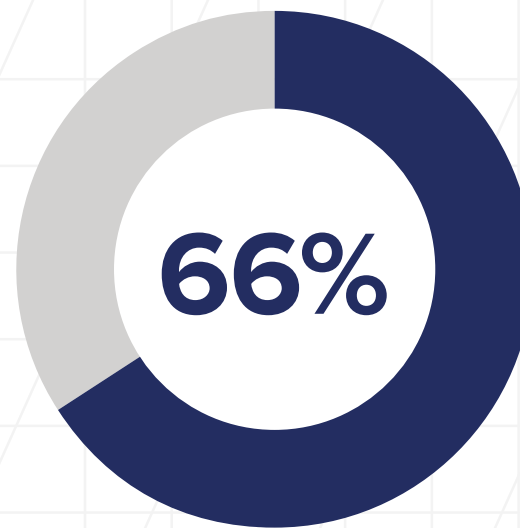
Of average CMO's budget is Martech²

The Customer Experience Gap

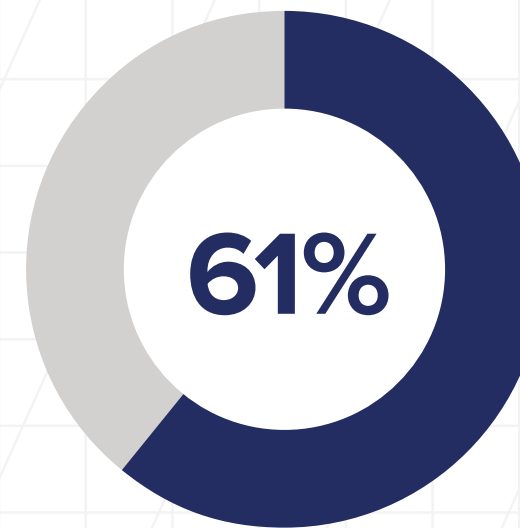
Despite the high level of focus on customer experience today, current investments in personalization aren't delivering as much impact as we might expect. Amazingly, Acquia found in its report, [Closing the Customer Experience Gap](#), that 66% of respondents can't remember the last time a brand exceeded their expectations. And 61% feel that brands which should know them, simply don't, even at a basic level. If that wasn't alarming enough, consider that 87% of marketers are confident that they are delivering a winning customer experience.

In other words, we're spending a lot of money on this problem and we think we are doing a great job. Unfortunately, the true focus of our efforts — the customer — just isn't feeling it.

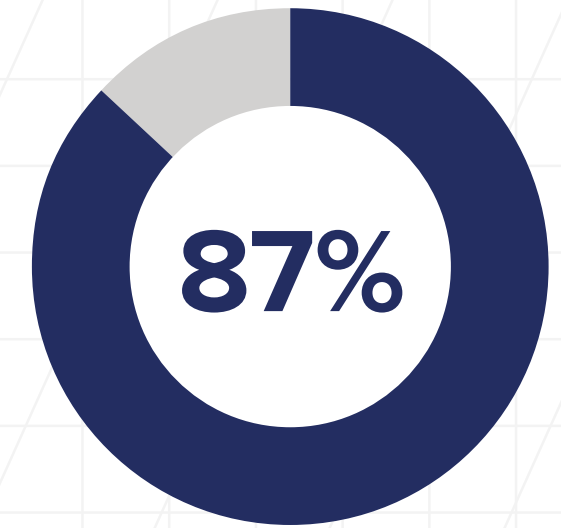
In Acquia's, *Closing the Customer Experience Gap* report:



Of respondents can't remember the last time a brand exceeded their expectations³



Of respondents feel that brands which should know them, simply don't, even at a basic level³



Of marketers are confident that they are delivering a winning customer experience³

Why Is It So Hard?

SECTION 2



Why Is It So Hard?

Given the resources available to businesses today, these results are perplexing. With all of the innovative marketing tools at our disposal, as well as access to unheard of amounts of data, why is personalization so hard?

Data Silos

Large companies spend plenty on marketing tools and platforms, but that doesn't mean that everyone in the organization (or the customer) reaps the benefits. The problem is that these solutions all need data to be effective. And the data they need is often distributed across various departments and systems in data silos.

While data silos can be purposeful in nature — to ensure data security, for example — they often arise organically and unexpectedly. Different departments and business units can have different and even competing goals, priorities and responsibilities when it comes to technology and data. As a result, they invest in solutions with a focus on their own aims, paying little regard

to integration or broader organizational priorities. Of course, data silos don't arise solely in large enterprises. Any organization who invests in marketing technology and other proprietary systems can find themselves in the same boat.

Dealing with Integrations and Legacy Technology

With proper monitoring, communication and collaboration, data silos can be identified and addressed. Still, eliminating data silos requires integration. And if two different divisions, for example, are locked into contracts with their own marketing tools, and those tools refuse to communicate, what do you do?

There's no easy answer to that question. Any path forward will require trade-offs, compromises and maybe even sacrifices. Tools that help platforms "talk" to each other do exist, but they can be pricey and their implementation can require time, expertise and resources.

Eliminating data silos requires integration. And if two different divisions, for example, are locked into contracts with their own marketing tools, and those tools refuse to communicate, what do you do?

It's no wonder that so many teams opt for the easier solution: avoiding the problem altogether and sticking with the existing IT architecture. Of course, that can simply compound the silo problem and make them harder to overcome in the future.

Going a level deeper, legacy infrastructure poses many of the same problems. You'd be surprised how many major, modern organizations still rely on legacy, on-premise applications due to contract lock-in or the daunting complexity of change.

Technology Isn't Always the Answer... It's Actually Part of the Problem

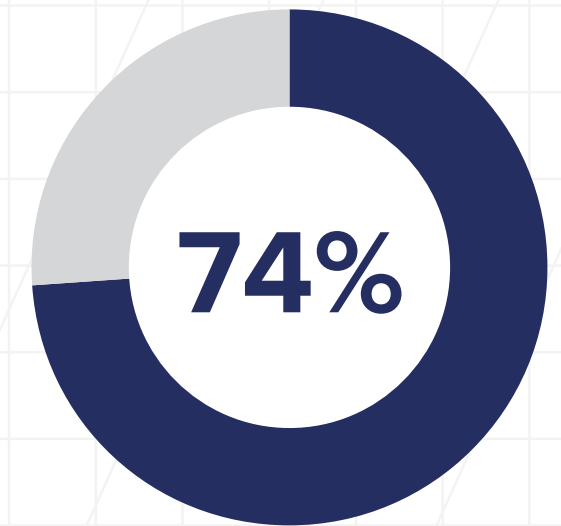
74% of marketers feel that technology has made it harder, not easier, to deliver personalized experiences. Indeed, though we've been talking about personalization for a long time, in many ways it remains a new practice. And best-in-class personalization technology is still being developed. Digital personalization is complex. Many of the available tools either don't work effectively or are difficult to

use, making them equally ineffective. Frankly, when developer resources are required for marketing initiatives, projects stall, workflows break down and powerful but complex tools become shelfware.

Lack of Strategy

Personalization initiatives all start with the best intentions. Improving the customer experience, connecting with customers, lowering barriers to entry and delivering a better brand experience are all noble causes. Nevertheless, teams often focus on personalization as an end in itself, rather than thinking through the specific goals personalization will help them accomplish or problems it will help them solve.

There is no plug-and-play solution to personalization. Even with the best tools, lack of a personalization strategy means that personalization initiatives will either not work or never get off the ground. Marketers need to lead and execute these initiatives with a clear vision of where they're headed and what it will take to get there.



Of marketers feel that technology has made it harder, not easier, to deliver personalized experiences³

Yes, personalization tools are often less expensive than CRM, marketing automation, or data analytics solutions. But organizations would never dream of funding those efforts without identifying their overarching goals and ensuring that the appropriate resources were in place. Why would we do the same with personalization?

Marketers Are on the Move

On top of all these challenges, we also see that marketing, especially digital marketing teams, tend to move around more than other professions. In fact, marketing has the highest turnover rate of any department across industries, at 17% year over year. When you add this factor to the aforementioned challenges, it's easy to envision why organizations struggle to build an effective personalization practice. Overcoming the above hurdles, only to see things stall when a team leader gets promoted or moves to another organization, can be both frustrating and demotivating.



The Solution in Three Parts

SECTION 3



The Solution in Three Parts

We probably haven't exhausted the list of possible reasons personalization is so difficult to achieve. Your organization could very well have its own unique challenges stemming from culture, history, budget and so on. However, at Acquia, we believe that there are three key principles that any team should follow to get on the right track.

Open Integrations: Utilizing open APIs and investing in open tools enable teams to leverage their existing investments, connect data sources and systems and create future-forward experiences that get you closer to a single view of the customer. With all of the technologies and platforms out there competing for your attention, using "open integrations" as your North Star will keep you on track.

Simplicity — not advanced functionality — is key: It's easy to get carried away with incredibly powerful, complex use cases. It's also easy to be impressed and persuaded by advanced capabilities or buzzwords such as "machine learning" and "adaptive analytics." But at the end of the day, you're using personalization to connect with people. People are complex, but not so

complex that you should let machines do all the work for you. Remember to stay down to earth, which is where your customers are.

A Crawl–Walk–Run Strategy Wins the Day: Don't get bogged down in or overwhelmed by the details. Start simple and build. With personalization, you crawl before you walk and walk before you run. Each step is essential in the process.

Start by connecting all of your systems. This will allow you to ultimately create multi-faceted personalizations. Collect and connect the right data. Build segments of users that are aligned to customer experience initiatives and based on their value to the business. Launch "hello world" personalizations on channels you own, like your website, and test them to determine their effectiveness before making your next move. Finally, build more complex personalization use cases focused on generating the highest business value. Ultimately, you will dramatically improve your customer experience, across multiple channels, with multi-faceted personalizations comprised of numerous customer data points.

With personalization, you crawl before you walk and walk before you run. Each step is essential in the process.

How to Personalize

SECTION 4



How to Personalize

It's great that marketers are embracing and getting excited about personalization, but personalization isn't easy. Doing it right requires time, resources, content and technology, but it's the only way to deliver results that improve your customer experience and drive your business forward.

That's where Acquia comes in. We've formulated a "secret sauce" to help turn personalization from theory into reality. Below is a three-step methodology we call the Crawl-Walk-Run Approach to Personalization.

Crawl

"Crawl" personalizations are ones you can start immediately, from a content and data standpoint. These are generally low effort (meaning they rely on easily collected data and can run all the time) and can produce fast results. Some examples of "crawl" personalizations are:

Geolocation: For those visiting your site from a specific city, you could personalize a section of your homepage

with information about a local event that you are sponsoring or attending in that city.

Marketing Campaigns: Let's say someone receives an email from you containing a link to your site. Create a consistent experience across channels by personalizing the homepage to match the content in the email.

Visit Frequency: First-time visitors to your site could see an "about us" image and link prominently displayed above the fold, while visitors who have been to the site before will not. For visitors who have returned to the site multiple times in a short window, you could offer an opportunity to sign up for a newsletter or 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.

"Crawl" personalizations are generally low-effort (meaning they rely on easily collected data and can run all the time) and can produce fast results.

Crawling starts with data. Data is the most important aspect of personalization. It's at the core of everything you do and every personalization flows from it. It's the first step to any effective personalization strategy and a requirement for doing personalization well. Generally, data collection serves a specific business goal, from proving out a hypothesis to feeding the demand gen pipeline. In addition to those objectives, for the purposes of personalization, the data you collect should provide deeper and deeper insight into your visitors, helping you build robust profiles and more refined segments. In other words, your data collection should help you personalize more effectively.

The data you collect in the early stages of your digital personalization journey provides insight into your visitors beyond geolocation or device type. It gives you visibility into your audience's implicit preferences, especially in terms of the content and experiences that drive them to action. The more data you capture, the better you understand your visitors, and that means you're ready to create more sophisticated personalizations.

Walk

When you enter the "walk" phase, start slowly. Walk personalizations will require additional content and more data. These personalizations involve medium to high effort and deliver medium to high impact. Some examples of "walk" personalizations are:

Browsing Behavior: Tag content from certain sections of the site (e.g., your blog, videos, product pages) that align to a specific segment you want to track. For visitors who tend to interact with that content, deliver or recommend similar relevant content on sections of the homepage or on whatever page they may browse.

Pages Viewed: Here you can personalize the site based on multiple views over multiple visits. If a visitor has looked at a lot of awareness-type content over a 30-day period, serve them conversion content on their next visit. Or if someone has visited a page about a specific topic several times, serve them new content on that topic when they visit the homepage.

The more data you capture, the better you understand your visitors, and that means you're ready to create more sophisticated personalizations.

Completed Events: For visitors who have taken an action (e.g., signing up for a webinar, attending an event or joining a newsletter), you can serve reminders about that event, content or information about a similar or related event or show them content or a call-to-action related to the next stage of the marketing funnel.

Personalization can't be done all at once: There's no instant solution; it needs to be ramped up over time. Even within the "walk" stage of crawl-walk-run, personalization is a process. You'll hear a lot of marketing speak and big talk around one-to-one personalization, 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 generic, one-size-fits-all experiences. That takes time.

Run

The final step is delivering great, personalized experiences to all your prospects and customers, even on channels you don't own. "Run" personalizations

require additional content, more personalization events, and more data. 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 over an extended period of time. Some examples of "run" personalizations are:

Integration with CRM: You could leverage data from tools like Marketo or Eloqua and personalize content on sites or mobile apps based on segment IDs or other identifiers in those systems. Acquia's Mautic brand is a provider of Open Source marketing automation technology for businesses, designed to save time, eliminate errors and improve efficiency by automating repetitive marketing tasks.

The real objective of personalization for most organizations today is to move away from generic, one-size-fits-all experiences. That takes time.

Cross-Channel: Your users might fulfill an order on a mobile website and then receive a discount or free delivery coupon either via email or the next time they log onto the mobile app.

Combination of Multiple Crawl Personalizations: You might target regional content to visitors from a specific region who have arrived at your site by clicking on a PPC online ad.

It's only when you look at the customer journey as a whole that you can create the customer experience required to acquire and convert customers and grow your business. Thinking about the entire customer journey 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 engagement and loyalty.

That sounds great, but what does it actually take to do this? Well, it takes the ability to not only map and ideate a customer journey, but also act on it, automatically, and not just on your website, but everywhere your prospect or customer may be. This is an ambitious goal, admittedly. But for organizations ready that truly want to compete and win on customer experience, it's a requirement.

Thinking about the entire customer journey means thinking beyond the point of sale and even beyond the traditional marketing funnel.

Essentials of Personalization

SECTION 5



Essentials of Personalization

To successfully and efficiently personalize your content, you're going to want to make sure some essential tools are at your disposal. Here's what those tools need to help you do:

Point, Click, Personalize: Personalization should be as straightforward as taking three simple steps. This makes set up easier, shortens implementation times and accelerates time to value. Thankfully, simple drag and drop tools exist to design and execute personalization rules that generate effective, targeted experiences.

A/B Testing & Targeting (with No Code): A/B Testing is an integral part of digital marketing. But not all A/B testing platforms are created equal. Fortunately, the industry has advanced to a point where you can run tests without the need to code. This allows you to collect valuable data — data that will influence and inform your personalization efforts as you move forward — without other teams (especially development teams with different priorities) becoming roadblocks.

Small Teams, Big Plans: Aligning personalization to promotions, deals, announcements and product releases is a critical component of optimization. Being able to schedule personalizations well in advance, and set the exact amount of time they will run, makes it much easier for teams of multiple sizes to incorporate them into their marketing and customer experience activities. For small teams, being able to schedule all personalization campaigns for a particular month or quarter enables you to manage your workload efficiently and deliver impactful customer experiences that drive engagement, conversion and revenue.

Multi-Lingual Personalization: It's extremely rare to find an enterprise-level organization that doesn't have a global presence. And managing an omnichannel presence is hard enough in one geography, let alone across the globe. So you want to make sure that your personalization platform provides the ability to create meaningful personalizations for all of your users, regardless of geography or linguistic requirements.

Personalization should be as straightforward as taking three simple steps.

Real-Time Dashboards and Analytics: When you're personalizing content, you need both a granular and a bird's eye view of your data. You also need to ensure that you can easily access metrics such as the number of visitors to your website per day or the number and order of events performed on your website per day, to name but a few. Easy access to this data empowers you to understand the performance of your personalization, and identify opportunities for optimization and improvement.

Onward and Upward with Acquia Personalization

Understanding your customer should go beyond their location, clicks and device. Acquia Personalization lets you segment your audiences using up-to-the-minute data so you can deliver their preferred content and experiences at the right time and place. Acquia Personalization gives marketers the insights they need to create and deliver targeted, in-context experiences that drive engagement, conversion and loyalty.

Some of its most powerful features include:

- Drag-and-drop functionality to build, preview and launch personalization.
- A customer data repository that provides a single view of customers.
- Real-time adaptive targeting refines segments while A/B testing keeps audiences engaged with content that resonates.
- The ability to create content, collect data and build personalizations all within a single interface.
- The ability to automatically recommend content based on what a user is currently viewing or has viewed in the past.
- Integration with Drupal, resulting in richer data collection and simpler content creation for personalization, but with the flexibility to

Acquia Personalization lets you segment your audiences using up-to-the-minute data so you can deliver their preferred content and experiences at the right time and place.

work on any CMS.

There's a difference between delivering digital experiences based on your audience's real preferences and just delivering content based on generic characteristics. Acquia Personalization's detailed, real-time data collection provides marketers with the tools to engage the right audience at the right time and place — based not only on user characteristics, but user preferences. Acquia Personalization aggregates visitor information from multiple channels and locations to create experiences that get more engaging and relevant over time.



Conclusion

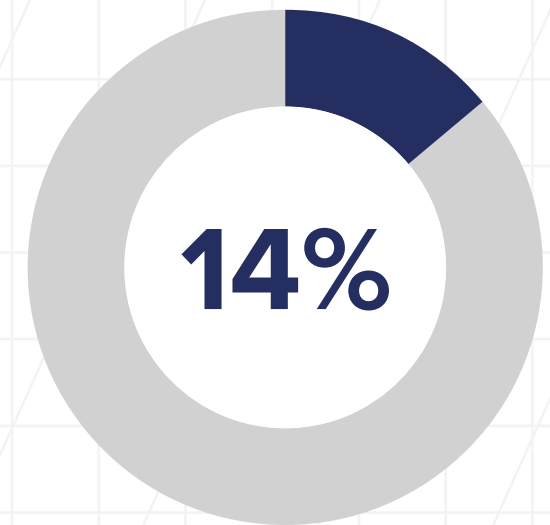
[Acquia's Closing the Customer Experience Gap](#) report found that 89% of digital businesses are investing in personalization today. Meanwhile, Gartner found in their [2018 CMO Annual Spend Survey](#) that 14% of the average marketing budget went to personalization. In spite of that, Acquia found that 79% said they feel like a generic customer rather than a unique individual when they engage with a business online. Clearly, we need to do more to deliver the experiences our customers not only expect, but demand.

In addition to what we've discussed above, at a high level, organizations should focus on two means for solving the personalization problem — open integrations and simpler tools. Customer experience teams should be identifying and investing in solutions that break down data silos rather than create new ones. They should also prioritize solutions that not only solve the problems of today, but can also optimize any

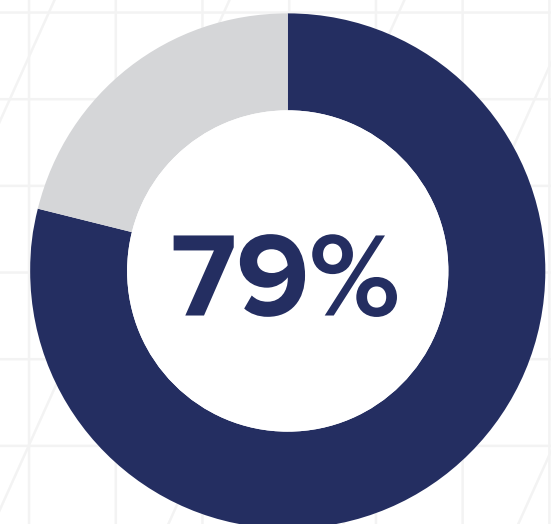
technical investment an organization might make as well as connect to any system.

Finally, they should seek out solutions that are truly marketer friendly and don't require developer or IT resources to build personalizations.

Personalization is a critical component of improving the customer experience because it helps cut through the noise of the Internet. Put yourself in your customers' shoes. They are bombarded with ads, promotions, articles and more every time they open their laptop or phone, let alone use any browser or app. By providing them with content based on their interests, you are not only improving your engagement and conversion metrics, but most importantly, you are providing a better digital experience for your customers — one that saves them time and makes it easier for them to accomplish their goals.



Of the average marketing budget went to personalization²



Said they feel like a generic customer rather than a unique individual when they engage with a business online²

¹<https://www.gartner.com/en/marketing/insights/articles/key-findings-from-the-gartner-customer-experience-survey>

²<https://www.gartner.com/en/marketing/insights/articles/8-top-findings-in-gartner-cmo-spend-survey-2018-19>

³<https://www.acquia.com/resources/ebooks/closing-cx-gap-customer-experience-trends-report>

ABOUT ACQUIA

Acquia is the open source digital experience company. We provide the world's most ambitious brands with technology that allows them to embrace innovation and create customer moments that matter. At Acquia, we believe in the power of community — giving our customers the freedom to build tomorrow on their terms.



[acquia.com](https://www.acquia.com)

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