

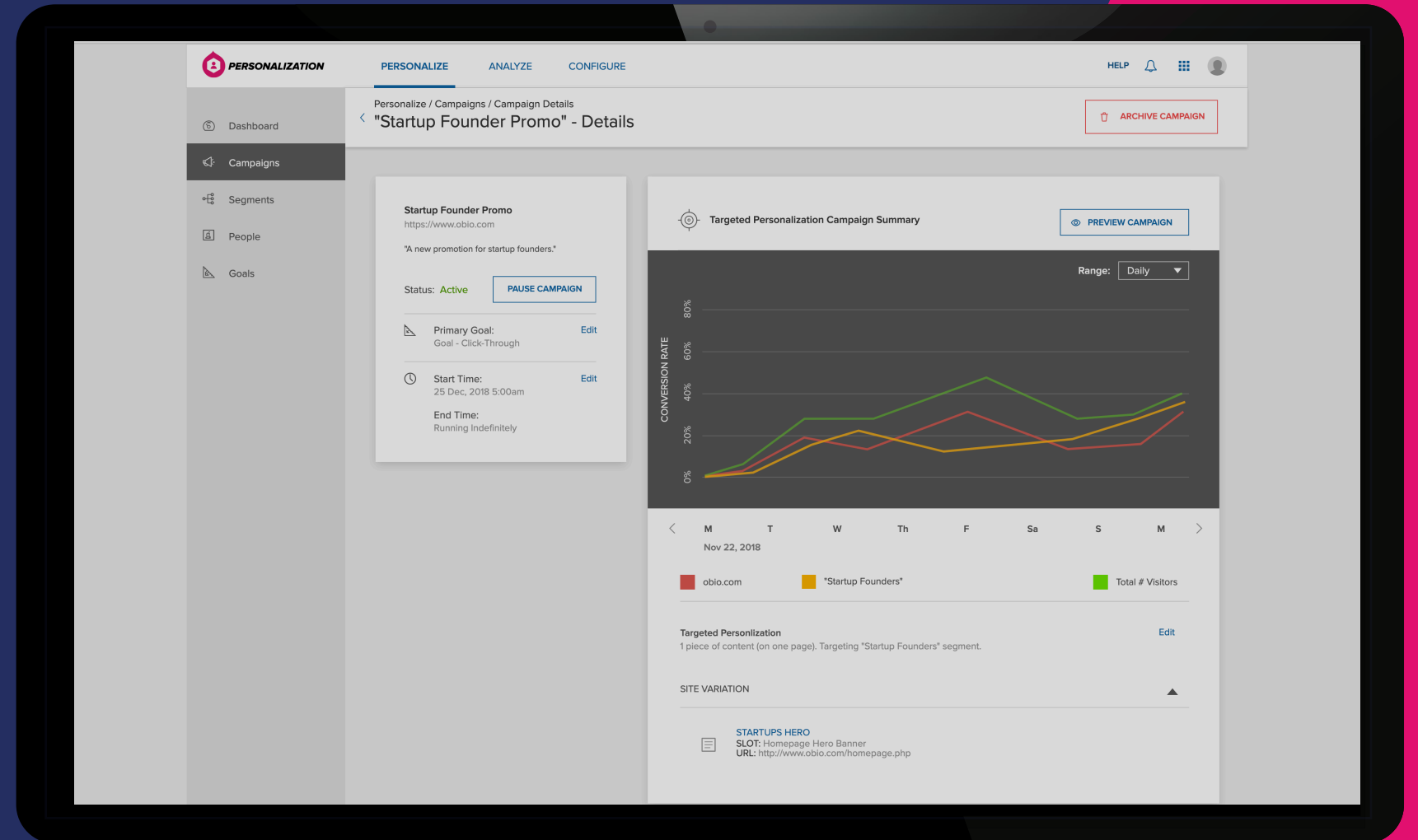



PERSONALIZATION

THE ULTIMATE GUIDE TO

ACQUIA PERSONALIZATION

Point. Click. Personalize.



A photograph of two women in conversation. The woman on the right is smiling and looking towards the woman on the left. A large, dark blue diagonal shape is overlaid on the image, containing white text. The woman on the left is wearing a patterned top and a watch. The woman on the right is wearing a black top with white polka dots.

SECTION 1
**Key Components of the
All New Acquia
Personalization**

SECTION 2
Setting Up a Campaign

SECTION 3
The Path to Personalization

Introduction

Organizations today are investing in personalization tools and platforms. But in many cases, they aren't getting the value they want or expect from them.

True, these solutions frequently offer advanced capabilities and features that sound impressive: everything from unified visitor profiles and dynamic, targeted content to cross-channel synchronization and advanced analytics. Too often, though, marketers have to rely on developers and IT support to implement these capabilities. And that means a lot of time and resources can get used up before they ever see any results.

We conducted over 50 interviews to hear straight from the source what teams look for in a personalization solution. Resoundingly, time and time again, the answer was a marketer-friendly solution with a simple interface that doesn't require inputting code or reliance on IT or developer resources.

To meet that pressing need, our goal was clear: to create the easiest, most intuitive personalization solution on the market today. We fundamentally re-thought what it means for marketers and their teams to deliver truly personalized experiences to their customers and prospects. As a result, we came up with a solution that enables marketers to create and deliver personalized digital experiences without relying on development resources.

The All New Acquia Personalization, our personalization tool optimized for Drupal, is tailor-made for marketers. It allows you to point, click and personalize – no code required.

In other words, it just became a lot easier to build personalization campaigns that deliver the right content to the right person at the right time, improving customer experience and increasing engagement and conversion.



The new Acquia Personalization offers:

A simple, intuitive UI

A simple UI that is intuitive for marketers, meaning anyone, regardless of technical acumen, can create and launch personalizations on their site.

Personalization in three steps

Three-step personalization campaign creation, so that teams can test and target users on their site quickly and easily without any code.

A visual builder

A visual builder that sits atop your website, allowing you to see the personalizations you create in context, just as your visitor will.

Built-in scheduling

Built-in scheduling capability, so teams can align personalizations to announcements, events, promotions and product releases.

Analytics at a glance

Analytics at a glance to quickly assess the effectiveness of personalization campaigns and make adjustments or changes on the fly.



PERSONALIZATION'S KEY COMPONENTS

When you log into Personalization, you will see five basic sections. Here's a rundown of what each section is for.



Dashboard

The Dashboard section is, just as you would expect, the place where you can get an overview of all your ongoing campaigns, segments and key metrics. You can think of the Dashboard as your homepage for Personalization where you can see all of your personalization activities at a glance. The dashboard's simple, intuitive functionality makes it easier than ever to deliver engaging experiences to your site users.

Global Overview CREATE NEW CAMPAIGN

FILTER: All Sites | RANGE: 6 Months

23 ACTIVE CAMPAIGNS (7 Inactive)

12,640 TOTAL UNIQUE VISITORS (Daily)

8,027 GOALS MET

192 EVENTS TRIGGERED (Daily)

TOP CAMPAIGNS	UPTIME	GOALS MET	CONVERSION RATE
1 Recruiter	6 months, 20 days	23,455	10%
2 Interested in Eco	3 months, 19 days	22,499	8%
3 First-time Visitor	5 months	18,363	5%
4 Northeast Discount Code	9 months, 3 days	10,629	5%
5 Returning Visitor	11 months, 2 days	5,437	2%

TOP SEGMENTS	# OF VISITORS	% OF TRAFFIC
1 Minimalist Collection	19,500	19%
2 Heritage Collection	15,436	12%
3 Startup Founders	19,500	11%
4 West Coast	19,500	7%
5 Find a Designer	19,500	5%

POPULAR CONTENT

- 3 Office Design Trends Every Finds Must Know (Article, Published: December 1st, 2017)
- The Importance of Accessorizing Your Desk... (Article, Published: December 1st, 2018)
- Cleaning Up Your Carbon Footprint at Work (Article, Published: December 1st, 2018)
- You Can Have A Space That Fosters Creativity (Article, Published: December 1st, 2018)
- How to Recruit and Retain Employees (Article, Published: December 1st, 2018)

POPULAR EVENTS

- Learn More - Homepage (Click Event, Used: 5 times)
- Account Creation (Click Event, Used: 5 times)
- Start Order (Click Event, Used: 5 times)
- Time on Site (Click Event, Used: 5 times)
- "Find Delivery" - Click (Click Event, Used: 5 times)

EXPLORE ANALYTIC DATA

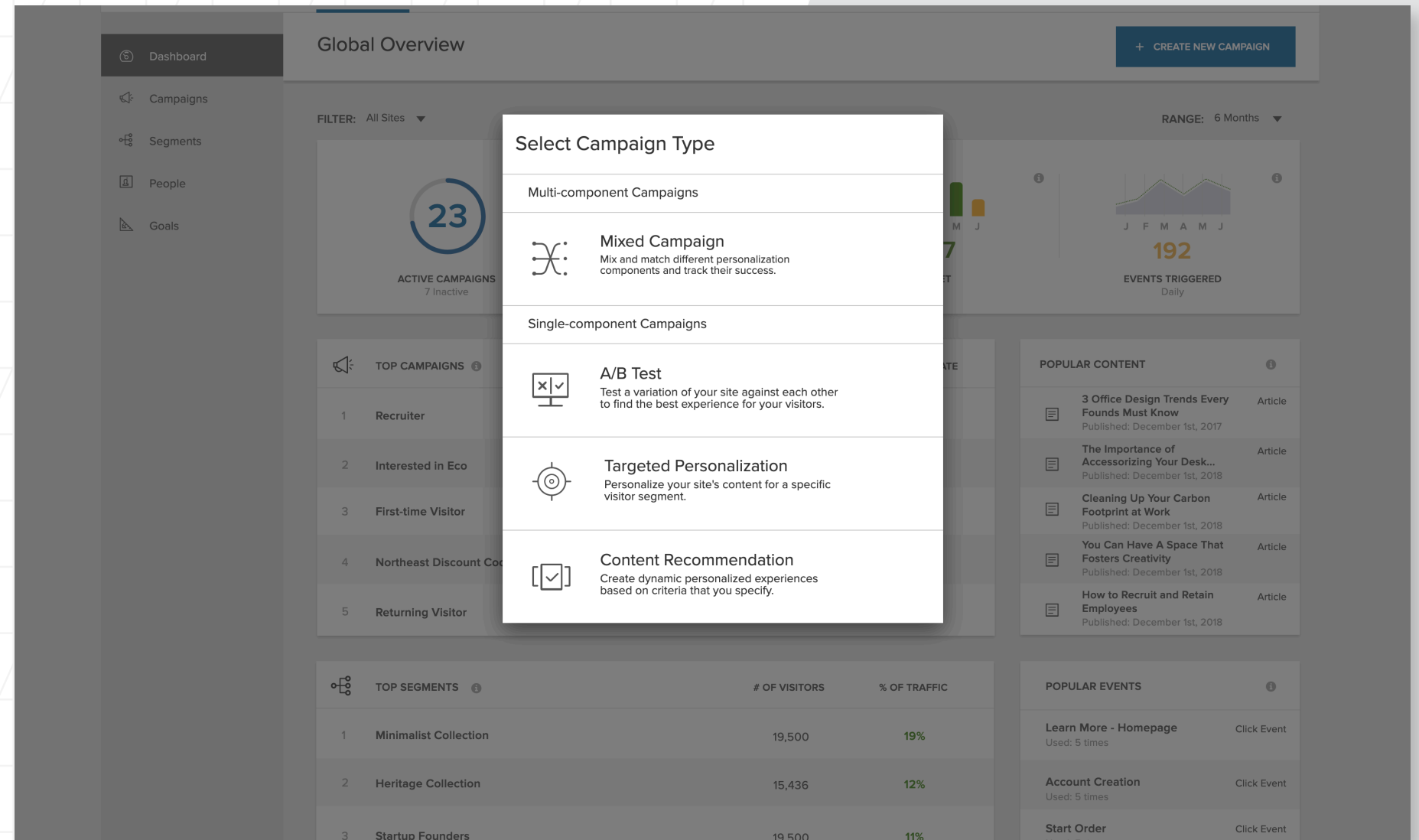
Campaigns

The Campaign section is where you create, manage and archive personalization campaigns.

Personalization campaigns can be set up in this section with just three easy steps:

- Define campaign details
- Configure personalization
- Preview and publish

When creating campaigns, you can select the exact places on a given page you want to personalize and the content you want to display there. Personalization then allows you to preview the personalized experience on your site, exactly as the target visitor will experience it.



Single vs. Mixed Component Campaigns

There are two different types of personalization campaigns you can build in Acquia Personalization: Single or Mixed.

Single campaigns come in three basic forms: A/B Testing; Targeted Personalization; or Content Recommendation. A Mixed Campaign is simply any combination of those three.

A/B Testing

An A/B test simply tests one variation of content against another to identify the most effective or compelling content. For example, a form that contains an image vs. one that does not.

Targeted Personalization

Targeted Personalization refers to content that is tailored to specific visitor segments. Relevant content is shown to visitors that match the criteria you have used to define the segment. For example, one hero image might be displayed to people visiting your site from a start-up, while another might be displayed to those visiting from one of the Fortune 500.

Content Recommendation

Content Recommendation campaigns focus on serving relevant content to specific visitors based on their profile data: previous browsing behavior; known preferences; favorite products; and other relevant insights. This type of personalization relies on “tagging” your content for a particular type of user. For example, you could have 10 pieces of content tagged, “Industry Type: B2C.” This content would then be dynamically rendered within a given session, or across sessions, to the appropriate users.

Mixed Campaign

A Mixed Campaign mixes and matches any of the above personalization campaigns. For example, a software company could run a Mixed Campaign with targeted personalization and content recommendations for marketers. Marketers who are targeted with a display banner about buyer intent data, for example, could also be shown a whitepaper or data sheet to download that is pertinent to their business.

Scheduling

Once you've set up your campaign, Personalization gives you the option to schedule the campaign. You can set a start date and an end date, or you can simply let the campaign run indefinitely. Campaigns can be scheduled to last for days, weeks, months, or even just an hour or a few minutes. This scheduling feature is particularly useful for organizations who seek to align personalizations to promotions, sales, product releases, or other time-specific, business-critical events. It is also useful for smaller teams who may not have that much time in a given week to build personalization campaigns. Scheduling allows a user to spend a few minutes creating multiple campaigns and then schedule them to run over the course of the next few weeks, months, or even longer.

The screenshot shows the 'Campaigns' management interface in the Personalization tool. The top navigation bar includes 'PERSONALIZATION', 'PERSONALIZE', 'ANALYZE', and 'CONFIGURE'. The left sidebar contains navigation options: 'Dashboard', 'Campaigns', 'Segments', 'People', and 'Goals'. The main content area is titled 'Personalize / Campaigns Campaigns' and features a '+ CREATE NEW CAMPAIGN' button. Below this is a search bar with the text 'Find a campaign...' and a 'SEARCH' button. The interface is divided into three tabs: 'List', 'Calendar', and 'Archived', with 'Calendar' currently selected. A filter dropdown is set to 'All Sites'. A note indicates 'Only showing campaigns with scheduled start or end dates.' The calendar view shows a grid for December 2018, with dates from 25 to 5. Campaigns are represented as colored bars with labels: 'Interested in Eco' (green, Dec 25-26), 'Recruitment' (blue, Dec 26-27), 'Fall Promo' (orange, Dec 28-29), 'First-time Visitors' (purple, Dec 28-29), 'Repeat Orders / Sign...' (pink, Dec 4-5), 'Visitors from Twitter' (yellow, Dec 12-13), 'Startup Founders...' (red, Dec 25-26), and 'Holiday Promotion' (light blue, Dec 4-5). A 'JUMP TO DATE' button is located in the top right of the calendar view.

Campaign Management

When you open the Campaigns section in Personalization, you will immediately see a list of all campaigns running at a given time, along with their status (active, draft, unpublished) and scheduled duration. This means you can manage campaigns right from the Campaigns homepage, making edits, updates and changes as needed.

The Campaigns homepage also features a calendar view, enabling users to check on all of their active personalization campaigns just as they would their own personal schedule. This view both displays the longevity of each personalization and allows users to click on individual personalizations for analytics at a glance.

The screenshot shows the 'PERSONALIZATION' dashboard with the 'Campaigns' section selected. The interface includes a sidebar with navigation options: Dashboard, Campaigns, Segments, People, and Goals. The main content area displays a list of campaigns with columns for STATUS, NAME, START, END, and ACTIONS. A search bar and a '+ CREATE NEW CAMPAIGN' button are also visible.

STATUS	NAME	START	END	ACTIONS
Active	Interested in Eco	1 Jun, 2018 12:00am	31 Dec, 2018 12:00am	EDIT DUPLICATE
Scheduled	Startup Founders Promo	2019-06-07 at 09:00	2019-07-07 at 09:00	EDIT DUPLICATE
Active	Recruiter	—	—	EDIT DUPLICATE
Complete	Follow up email	15 May, 2018 12:00am	31 Sep, 2018 12:00am	EDIT DUPLICATE
Active	First-time Visitor	1 Jan, 2018 12:00am	1 Jan, 2019 12:00am	EDIT DUPLICATE
Draft	Northeast Discount Code	—	—	EDIT DUPLICATE
Active	Reoccurring Visitor	—	—	EDIT DUPLICATE
Draft	West Coast Discount Code	1 Jan, 2018 12:00am	—	EDIT DUPLICATE
Active	Visitors from Twitter	1 Jun, 2018 12:00am	31 Dec, 2018 12:00am	EDIT DUPLICATE
Complete	Summer Promo	15 Oct, 2018 12:00am	1 Sep, 2018 12:00am	EDIT DUPLICATE

Segments

A segment is an organizational unit describing one or more attributes you want to track and target in Acquia Personalization. Segments identify and organize your website's visitors based on factors such as their persona, the content they most prefer and past actions they have taken.

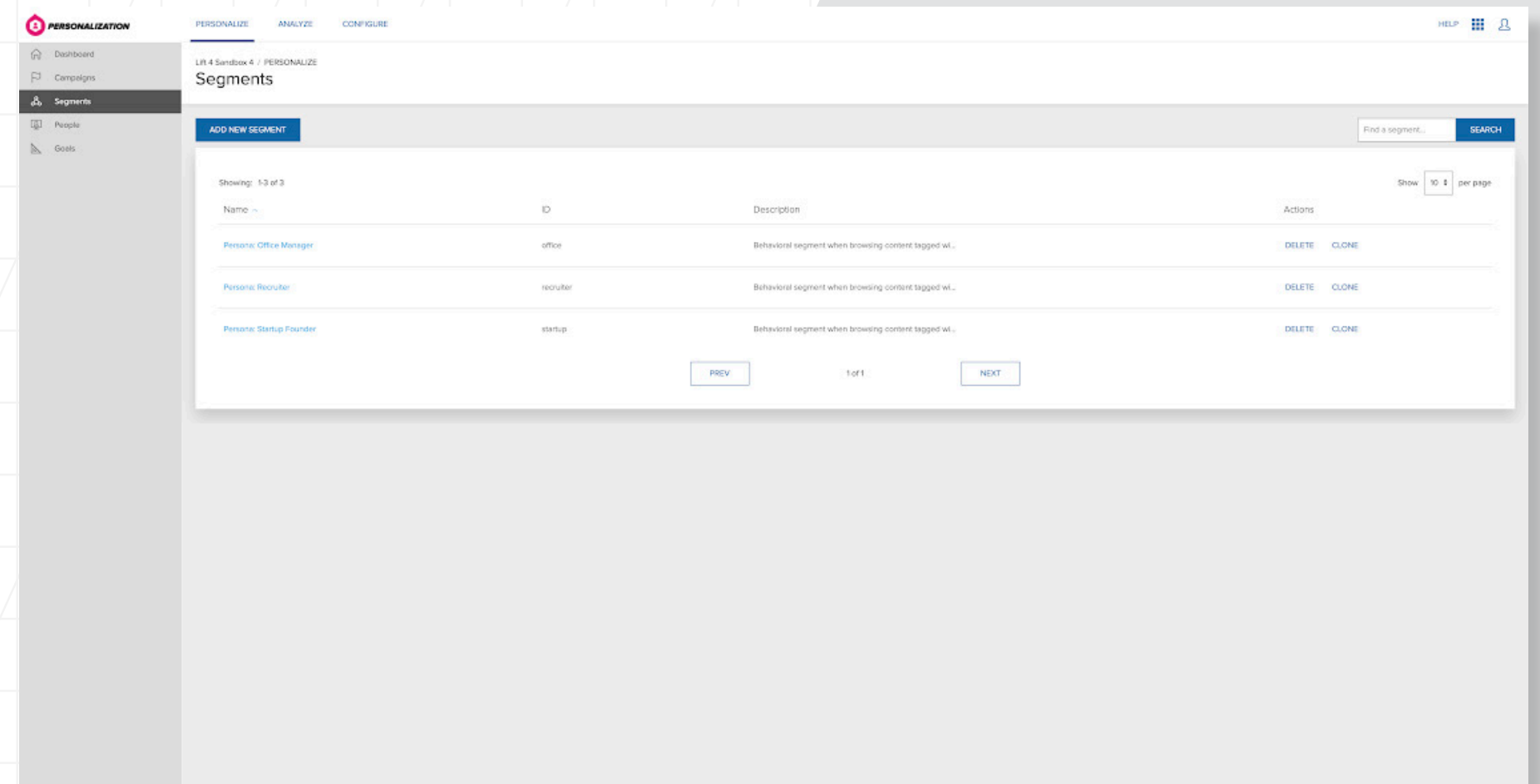
Managing Segments

The Segments page gives you a quick view of all your segments and allows you to manage, edit or update them as needed. The Segments page contains options for the following actions you can take:

- Display — View a list of your segments
- Edit — Make any changes to the segment
- Delete — Permanently remove a segment
- Clone — Make a copy of a segment

Creating New Segments

To create a new segment, simply click the “Add New Segment” link on the Segments page. From there you can enter the values for your new segment, such as a name and description.

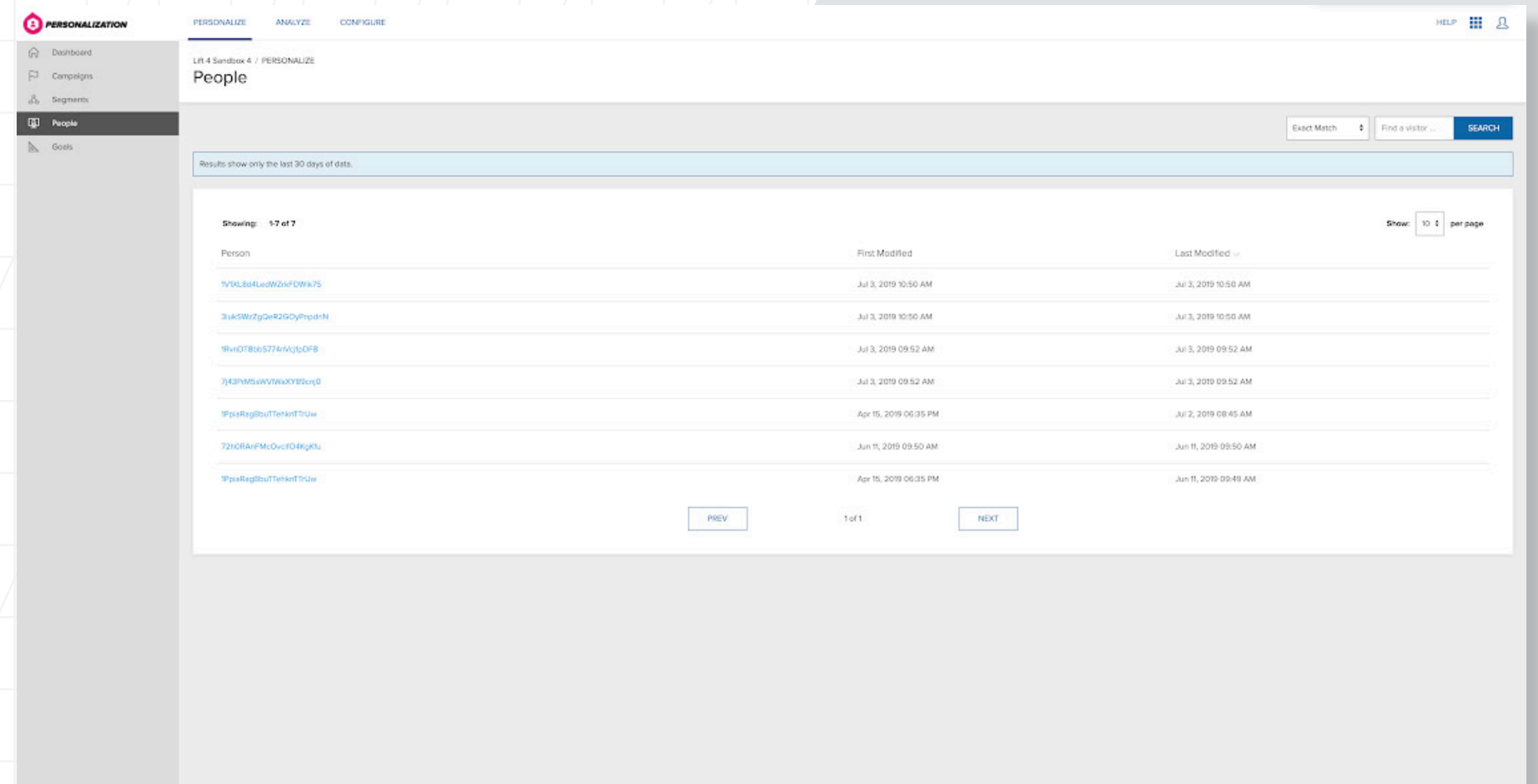


People

Unified Profiles

As visitors interact with your content, data is collected in real time in unified profiles, allowing you to accurately segment them. The records visible in the People section serve as the basis for your visitor profiles. The most basic information that can be collected from anonymous visitors — device type, geolocation, whether they're first-time or returning visitors, content preferences — serve as the basis for your visitor profiles.

The goal, of course, is to turn anonymous visitors into known prospects and, ideally, customers. Acquia Personalization's ability to build and update user profiles in real time, collect profile data across sessions and devices, and merge known and anonymous profiles provides a single view of your customer, enabling further personalization and targeting.



Goals

A Goal is an event that occurs due to a personalization, for example, a clickthrough after being shown a targeted personalization or a download resulting from a content recommendation. Setting goals allows you to monitor and evaluate campaign performance, helping you understand which content variations perform better than others.

Managing Your Goals

The Goals page displays options for actions you can take with your available goals:

- Find – Enter your search criteria to find the right goal(s) for your campaign. This can be filtered by selecting a customer site
- Add – Add a new goal
- Edit – Change a current goal
- Delete – Remove a goal from your campaign
- Clone – Copy a goal for use in other campaigns

Adding New Goals

To add a new goal, simply click the “Add New Goal” link and enter information about your goal, such as the goal name, description and value.

Not all goals are created equal. Users have the ability to attribute different values to different goals, essentially ranking the importance of each goal depending on how important the relevant action is to the organization. For example, a button click could have a value of “1,” while a whitepaper download a value of “10.” Analytics can then tell you how much value each profile or segment contributed to your goals.

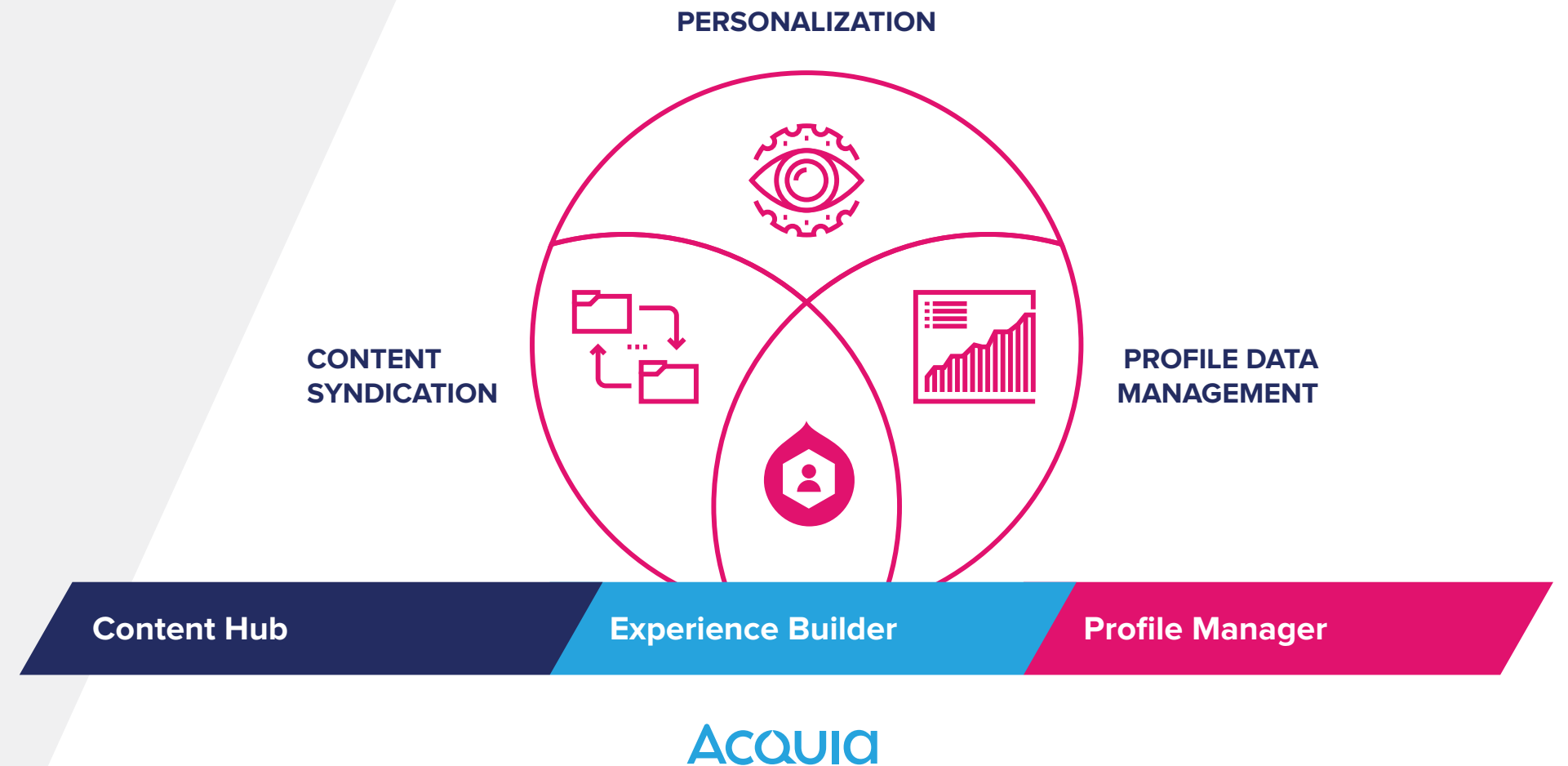
Alternatively, goal values can be used to directly track revenue generated. For example, you could have a goal called “Purchased 1-year Subscription” and set that value at \$50, and a different goal, such as “Purchased Monthly Subscription,” set to \$5.

Acquia Personalization Glossary of Terms

There are some terms unique to Personalization that are worth highlighting. Let's start with Personalization's place in the Acquia ecosystem. Personalization sits atop three critical solutions: Content Hub, Experience Builder and Profile Manager.

Profile Manager

A cloud-based application that collects data and information from your website visitors, Profile Manager allows customers to search for and categorize data about each of your visitors, based on customizable criteria such as location or the content type the visitor has viewed most frequently. Profile Manager allows you to organize this data into segments, or groups of criteria that visitors often have in common. For example, if your website specializes in vacation packages, a visitor who clicks on a skiing vacation might fit into a predefined Sports Enthusiast segment. You can also create JavaScript-based slots, or customizable placeholders, on your website to drag and drop customized content that can target those specific users.



Content Hub

Content Hub is a cloud-based, centralized content distribution and syndication solution that gives you the ability to share and enrich content throughout a network of content sources (including Drupal websites) with extensible, open APIs. It enables enterprises that operate many digital properties to effectively publish, reuse and syndicate content across a variety of content sources and publishing channels. Acquia Personalization leverages Content Hub's capability to syndicate content to automatically syndicate content that has been created for your Drupal website to also be leveraged for personalization in Personalization. This means you don't have to re-add or reclassify your content created in Drupal, and that creating content for personalization fits within your existing content creation workflow.

Experience Builder

Experience Builder is the actual visual builder itself that brings the data and content you have together. Sitting atop your website, it's where you create the experiences your users will have.

Slots

A slot is any area on your website you can configure to display personalized content. After you create a slot, you can drag and drop content variations into it to be displayed to different segments.

Events

An event is any interaction a visitor has with your site, such as clicking a link, filling out a form or downloading an asset.

Acquia Personalization integrates with Google Analytics to track and analyze events. With this integration, you can look at metrics such as bounce rate, time on site, or other GA metrics as a whole through the lens of a specific segment aligned to your business goals, adding an additional layer of detail to reporting.

SETTING UP A CAMPAIGN STEP BY STEP

One of the guiding principles for building the all new Acquia Personalization was to make it easier to create personalizations, so that anyone could simply Point, Click and Personalize. In this section, we will review how easy it is to set up a campaign in Personalization.



Step One: Campaign Details

From the Dashboard, select which type of campaign you'd like to run — A/B Test, Target Personalization, Content Recommendation or a Mixed Campaign.

Campaign Information and Choosing a Campaign Goal

After entering your campaign information (name and description), you'll select the website you want to run the campaign on. (Note: Personalization enables you to launch personalizations on multiple web properties from a single console.) Next, you'll need to select your campaign goal(s) — the success metric(s) by which you'll evaluate whether or not your personalization is successful.

Schedule Your Campaign

To schedule a campaign, click on the start date and select the day and time you want your campaign to begin, then do the same with the end date. After your campaign is created and scheduled, you are ready to configure your personalizations.

The screenshot displays the 'PERSONALIZATION' dashboard interface. The top navigation bar includes 'PERSONALIZE', 'ANALYZE', and 'CONFIGURE' tabs, along with 'HELP', a notification bell, and a user profile icon. A sidebar on the left contains navigation options: 'Dashboard', 'Campaigns', 'Segments', 'People', and 'Goals'. The main content area is titled 'Create New Targeted Personalization' and shows 'Step 1: Campaign Details'. The form includes the following fields and options:

- Campaign Name:** A text input field containing 'Furniture Promo'.
- Campaign ID:** A text input field containing 'startup_founder_promo' with an edit icon.
- Campaign Description:** A text area containing 'A promo for furniture lovers who are in the market for contemporary or traditional style sofas.'
- Choose Website:** A dropdown menu with 'http://www.obio.com' selected.
- Choose Campaign Goal:** A dropdown menu with 'Click-through' selected as the primary goal, and a '+ ADD SECONDARY GOAL' button below it.
- Enable Scheduling:** A checkbox labeled 'Specify a date & duration to publish' which is checked.

On the right side, a vertical progress indicator shows three steps: 'Step 1: Campaign Details' (highlighted in green), 'Step 2: Configure Personalization', and 'Step 3: Preview & Publish Campaign'.

Step Two: Configure Personalization

Choosing a Segment: Here's where you identify the group of visitors you want to see the personalized experience. All segments that have been created will appear in the "Choose Segment" drop-down menu, so you'll just need to select the segment you'd like to target, then click "Build Personalization."

Build Personalization: Here you find one of the most compelling features of Acquia Personalization, the visual personalization builder. This powerful feature enables users to view, build and preview personalizations they create exactly as they will appear in context to the targeted visitor.

In the visual builder, users build personalizations by selecting specific content they want to appear in existing slots or in new slots, based on known visitor attributes.

Slots can be created anywhere on a page, either in places already designated for hero banners, text blocks and images, or where no specific content yet exists. Any content in your Drupal or other CMS is available to be used for personalization thanks to the syndication capabilities of Content Hub.

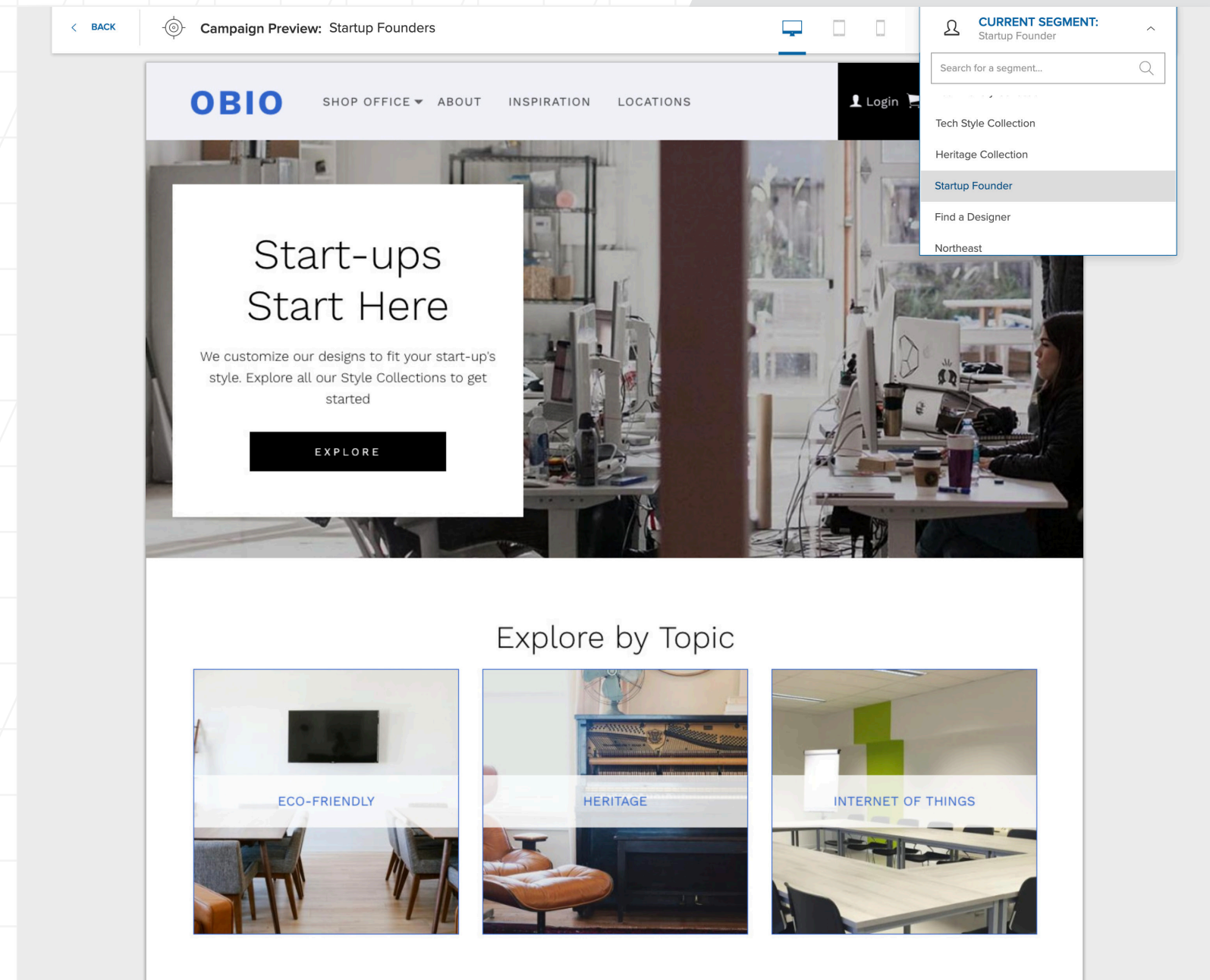
Creating a slot in the all new Acquia Personalization is easier than ever, as users simply point and click on the section of the page where they want to create a slot. In the bottom toolbar, users also have the ability to view all active slots on a given page and prioritize or edit them as needed.

Once a personalization has been created, users can preview their campaign as it will appear on the website, and publish it when ready.

Step Three: Preview and Publish

Step Three is the easiest step. First, you review the campaign name, schedule, target segment and goals. Next, as mentioned, you can preview what the campaign will actually look like. Click “Preview Campaign” and it brings up a representation of the website. On the top right, you select one of the segments that have been created and see in real time what that page will look like when activated by a visitor from the target segment.

If everything looks the way it should, simply click “Publish.” Having published their campaign, users return to the Campaigns homepage.



THE PATH TO EFFECTIVE PERSONALIZATION

As you've just seen, Personalization is a powerful and easy to use personalization solution. However, effective personalization requires more than just technology. It requires a comprehensive approach to data collection and data analytics, a robust and flexible content library, and strategy and planning to launch.



Crawl, Walk, Run

Personalization requires data, content and technical resources. You also need a long-term vision for personalization at your organization. Personalization is not “one-and-done.” It’s not a box you check. It’s a process with levels of maturity. Taking a methodical approach to developing personalization maturity is the only way to deliver a better customer experience and drive your business forward.

For this reason, we recommend a three-stage approach to personalizations that we call “Crawl, Walk, Run.”



Crawl

The first stage, “Crawl,” consists of collecting data, building visitor profiles and creating low-effort personalizations you can get up and running immediately. These personalizations generally rely on easily collected data, can run continuously and produce fast results. Some examples of Crawl stage personalizations include those based on:

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

Marketing Campaigns — For those who received an email with a specific UTM code, use the fact that they clicked on

the emailed link to create a consistent experience across channels, for example, by personalizing the homepage to match the content in the email.

Visit Frequency — Have first-time visitors see an “About Us” image and link prominently displayed above the fold, but remove that image for returning visitors. 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 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.



Walk

Walk stage personalizations will usually require additional content and more data collection for further defined segments. These personalizations are medium-to-high-effort (data that may require multiple visits and additional content creation), with medium-to-high impact. Walk stage personalizations are often based on the following:

Browsing Behavior — This involves tagging content for certain sections of the site (blogs, videos, specific web pages) that align to a specific segment you want to track. When visitors interact with this content, you can use that data to deliver more targeted content.

Pages Viewed — Here you use data about pages viewed to infer visitor interest or intent. 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 the next time 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), that data can be used to serve them reminders about that event or, since you now have an email and a company, serve a hyper-personalized offer.



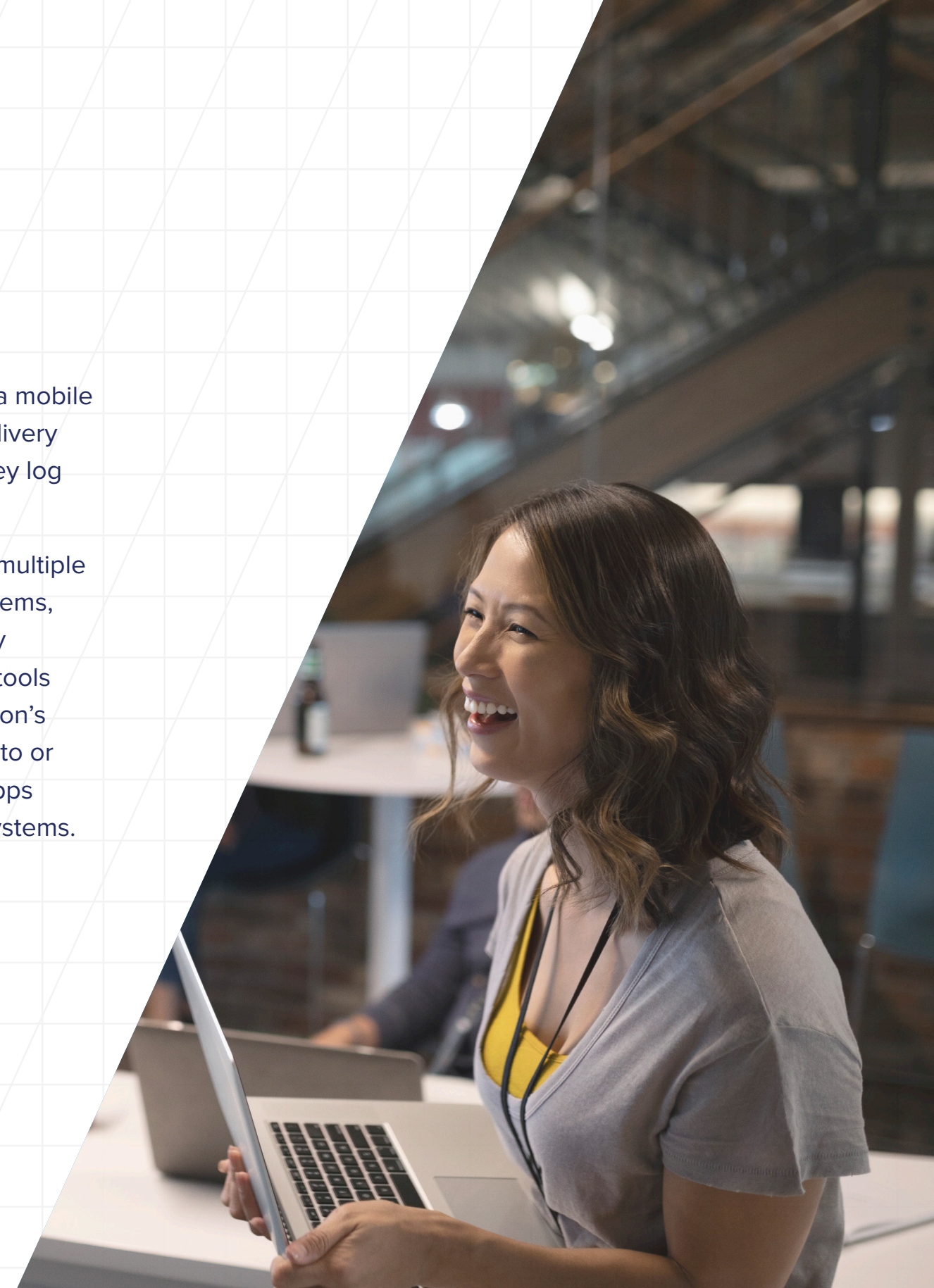
Run

Once you understand which of your personalizations produce positive results and why, 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. When you're ready to "Run," you can enact custom, hyper-targeted and omnichannel personalized experiences based on data such as:

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.

Cross-Channel — When a visitor fulfills an order on a mobile website, send them a discount or coupon for free delivery via email or serve this promotion up the next time they log onto the mobile app.

Integration with CRM — While this can be done at multiple stages depending on the quality of data in other systems, most organizations will leverage data from third-party tools like CRM, ABM, DMP, or marketing automation tools to augment the information collected in Personalization's Profile Manager. 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.



THE MOST EFFECTIVE PERSONALIZATION SOLUTION ON THE MARKET TODAY

Acquia Personalization is the simplest, most intuitive and most effective personalization solution on the market today. It is a single solution that combines customer data and ready-to-use, relevant content across all of an organization's websites. Unlike other personalization tools, it is designed to be used by marketers, not IT pros or developers. Anyone, regardless of technical acumen, can create and launch

personalizations on their site by simply pointing, clicking and personalizing — no code required.

To see how the all new Acquia Personalization can help you drive more personalized relationships with your customers and significantly increase conversion, loyalty and customer lifetime value, request a demo today to see the product in action.

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.



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