
Personalization Is a Strategic Process Not a Quick Win

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PERSONALIZATION IS A STRATEGIC PROCESS NOT A QUICK WIN

A strategic approach ensures that personalization actually improves conversions and justifies the investment. But where do you start?

Recently I participated in a presentation about personalization at the [Acquia Engage](#) conference in Austin, TX. My segment followed on from Acquia's [Bryant Shea](#) who

talked about the need for personalization and how to implement Acquia's [Lift](#) engine. Bryant established that the majority of marketers 1) are aware of personalization, 2) know the potential benefits, and 3) have a desire to implement. However, implementing personalization doesn't guarantee success, so I unpacked the potential pitfalls and provided guidance on where to start.

At BFM, we believe that personalization can provide substantial benefits to a website and that significant ROI is possible, even once you factor in potentially significant tech, development and content costs. However, planning is key because personalization engines are not autonomous, and they need humans to make decisions and revisit these decisions over time.

Set goals or you're set to fail

Personalization optimizes the onsite experience based on onsite and offsite behavior and other customer / prospect data, but without starting with customer insights or some basic customer 'truths', you can end-up optimizing the customer journey in a bubble.

This provides some significant risks:

- Converting low-value customers
- Attracting leads which never convert
- Increasing engagement, but not conversions
- Generating an impractical volume of data

Personalization should start with the setting of goals, because without concrete objectives you cannot define a strategy to meet those objectives. A set of typical objectives for personalization might be:

1. Acquire more 'best' customers
2. Retain most valuable customers
3. Acquire leads/customers within a particular sector/target

These are basically marketing objectives nobody can argue with, but personalization is no guarantee you will achieve these.

Define appropriate segments and appropriate segment quantities

To be able to develop a strategy to deliver against your objectives, it is critical that you can identify your best customers and/or new types of customers you want to attract (but don't have as customers yet). To define best (or ideal target) customers may involve many factors, for example:

- Products purchased
- Product usage
- Location
- Demographics
- Website/app/device usage
- Sector, company type, job title, etc.
- Acquisition channel
- CRM interaction

Personalization engines can identify and act upon many of the traits which help define your best customers, so the first part of any personalization strategy is to map the personalization engine criteria to those criteria which impact customer value and/or future value (e.g. customers in new sectors or markets you want to attract).

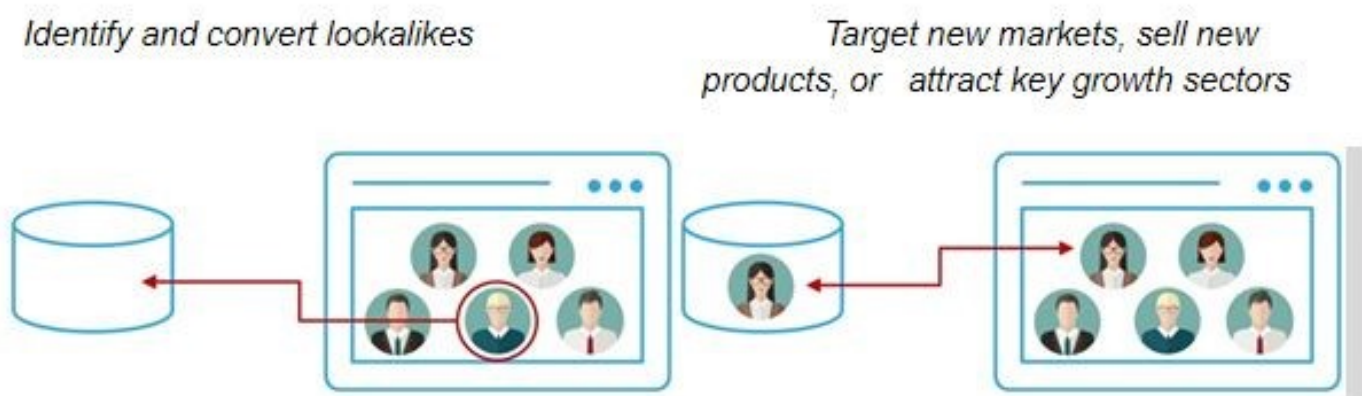
One point that many brands forget: just because you can personalize based on a user's device or location, it doesn't mean you should. Certain factors might have no bearing on acquisition rates or customer value, and can simply serve to confuse users and/or create 'busy work' for the marketing department. For example, we had a prospect who expressed a desire to personalize the homepage based the NFL team

local to their head-office, with no explanation about how this tied into their brand or could possibly increase conversions.

The second part of the strategic approach is to identify how much content you have and how much content you are able to produce. This, along with the mapping of relevant criteria defines the number of segments you want to create for personalization purposes.

NOTE: products can be 'content' too, so if you have only 4 products you don't need to create 8 segments.

The personalization strategy is then typically to:



Strategic implementation – crawl, walk, run

Lastly, you need to be strategic in the execution:

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- Start with something impactful
 - For example, homepage banner, product landing pages, related products, related content, etc.
 - Start with what is manageable
 - Number of segments (with few content topics and weekly updates, you can't cater to hundreds of segments)
 - Define an update plan (infrequent vs frequent)
 - Infrequent = Segments, slots and rules
 - Frequent = Content, A/B tests and scheduling
 - Define an evaluation plan (before you start)
 - What metrics will be used and what will define success

Making personalization perform

I'm not for one minute saying that brands shouldn't embrace personalization and jump in with both feet. They should. However, success does require careful planning and the designation of a project lead who is able to implement the strategy and adjust course as needed[b1] .

One example of a successful strategic process for personalization implementation. is our client Workfront. We developed their new [website](#) on Drupal 8 on Acquia earlier this year and deployed Acquia [Lift](#)[b2] . Thanks to thorough planning and working iteratively, personalization was only implemented when valuable or relevant to audiences, different enough to ensure unique experiences and manageable internally. As a result on-site conversions have increased and Workfront has made in-roads into important sectors.

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