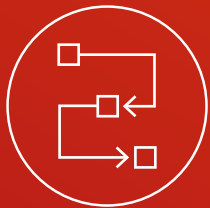Your world is big.
That's how we think.

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Strategic Personalization Guide

Three key ways to speed up success with CX personalization

Main takeaways

Prioritize initial personalized experiences and scrutinize impact of effort

Start with one or two personalized journeys or persona-specific content plans for critical experience moments and use the right data to measure performance against KPIs.

Plan for content production

Understand what content is needed to produce each personalized experience, across channels and build bridges across the organization to make it real.

Use a people-friendly personalization technology

Give your marketing team the direct ability to execute personalized experiences to reduce complexity and time to market.

Customer experience (CX) is mission-critical as consumers demand tailored, engaging brand interactions. Since investing in CX can triple your return and increase revenue by 19%[1], market-leading companies are using data to deliver rich, relevant experiences through personalization – presenting custom content that resonates with their audience.

As a result, these businesses can better:

- **Convert** visitors into customers
- **Nurture** customers for repeat business
- **Drive** brand preference
- **Deepen** engagement
- **Increase** ROI and revenue

But delivering personalization is difficult

A recent survey found that 32% of CX-focused leaders believe personalization is critical to improving their company's customer experience, but more than half believe their organization is not ready to adopt it.[2] Many organizations simply don't have the technology nor the capabilities to get started. In fact, 71% feel that they have insufficient marketing technology skills in-house to build these kinds of digital projects at speed.[2] The resulting outcome is mediocre one-size-fits-all customer experiences, ineffective marketing campaigns and lagging results.

In 2016, investments in personalization improved site conversion rates for **51%** of retailers and improved average order value for **36%**.[3]
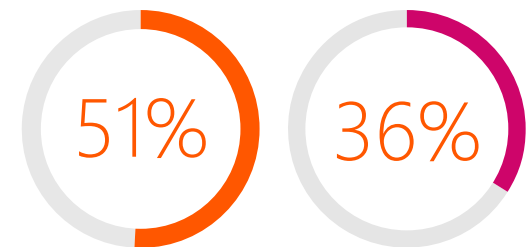
51%   36%

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What separates leaders from laggards?

According to a survey from MIT Center for Information Systems Research (CISR), "...top performers generate deep customer insights and use those insights to create differentiated, personalized, and completely distinctive customer experiences".[4]

Customer engagement by top and bottom performers

	Not at all			To a great extent	
	1.0	2.0	3.0	4.0	5.0

Seamless across channels
- Top: 3.4
- Bottom: 2.6

Consistent across sales and services
- Top: 3.8
- Bottom: 2.8

Responsive to changing customer expectations
- Top: 3.6
- Bottom: 2.9

Generating deep insights into customers
- Top: 3.9
- Bottom: 2.6

Engaging the customer in personalized relationship
- Top: 3.9
- Bottom: 3.0

Differentiated by customer segment
- Top: 4.0
- Bottom: 3.1

Able to connect customer with a related community
- Top: 3.5
- Bottom: 2.4

Differentiated from experience with competitors
- Top: 4.1
- Bottom: 2.9

■ Top performers on business performance outcomes
■ Bottom performers on business performance outcomes

Source: Ross, Jeanne W., Ina M. Sebastian, Cynthia M. Beath, Lipsa Jha, and the Technology Advantage Practice of The Boston Consulting Group. 2017. "Designing Digital Organizations—Summary of Survey Findings." MIT Sloan CISR Working Paper No. 415. Massachusetts Institute of Technology, February.

[4] MIT CISR: Designing Digital Organizations – Summary of Survey Findings, Jeanne W. Ross, Ina M. Sebastian, Cynthia M. Beath, Lipsa Jha, and the Technology Advantage Practice of The Boston Consulting Group, February 2017

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Get more from your
Customer Management
System (CMS) to get personal
with your customers

Avanade and Sitecore
can help. Our award-
winning client experiences
demonstrate how we can
help you successfully deliver
personalization for a richer
end-to-end customer journey.

We recommend focusing
on three core elements
to get started.

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1. Start small with one or two personalized experiences

Use a measured approach when getting started with personalization. Define your strategy and start small, beginning with only one or two personalized personas and/or journeys. This method is realistic to avoid overload and abandonment.

Plan against specific business goals

1. Identify one or two user personas or journeys that are top priority for initiating personalization. These should be the most critical moments in the highest-value journey(s). Analyst firm Forrester agrees "...brands win by treating peak and end moments as defining instances that highly correlate to customers' satisfaction and joy".[5]

2. Define your levels of personalization, considering customer lifecycle stage and narrowing down from prospects, existing and repeat customers, known profile data to geolocation.

3. Plot each journey from the beginning – whether that's an external location like a display ad or direct from the homepage – to landing or detail pages, tracking all related components (images, copy, etc.) to personalize. To begin, personalized content on your home page could be a reward for providing and validating an email address that will, in turn, enable ongoing marketing and transactional conversations.

4. Align each component to a specific goal, like increasing cart views and growing close rates. This means you need to have an existing benchmark captured against each specific goal to measure against. It's also good practice to look at your competition and see what is happening in your market – third-party analyst and research firms can help.

> The goal alignment process also gives you a scientific way to measure personalization results, which is critical for planning.

[5] "Modernize Your Martech Stack for Moments", Forrester Research, Inc., Joe Stanhope and Julie A. Ask, April 5, 2018

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Regularly evaluate performance

Once your personalized user journeys are live, conduct regular performance assessments to get results you can benchmark against. Compare these to your best-performing campaign or asset. Are your personalization efforts achieving what you expected? Check back on your strategy to see if you're on track. If, for instance, your goal was to increase the close rate for a certain product by personalizing its related web content, confirm if those digital sales grew. Look for anecdotal evidence as well, as this can help to illustrate your hypothesis and validate your approach – also key to bringing others across the organization into the journey with you.

Connect your data points

Prepare for these monthly moments of truth by ensuring you have the web analytics capabilities in place to accurately measure performance. Some experience platforms make this process easier than others. If you've built the experience within Sitecore, for example, tap into its built-in Path Analyzer (see next page) maps to quickly get reports you need. If, like many organizations, you do not have the analytics resources in place to manage analytics, lean on an external partner who has the necessary expertise.

Test and improve

As you improve the experience and become more familiar with personalization, try A/B testing where the same persona is presented with two different experiences, and see which gets the better outcome against the KPIs your organization cares most about. Usually with personalization, changes in performance can be assigned to a specific component like imagery and copy. Combine performance assessment results with testing intelligence to make more informed content decisions.

> Monthly checkpoints generally provide enough time to capture results, and frequent assessments within 90 days allow for adjustments while content is still relevant.

Strategy is crucial to successful personalization

Be clear when defining success, and ensure your goals map back to this definition. Without relevant, measurable goals, you will never truly achieve personalization. It's important for your CX platform to have automated goals functionality; this makes it easier to track visitors' activities to measure business KPIs against your web content.

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Sitecore's Path Analyzer tool can quickly get the web analytics reports you need
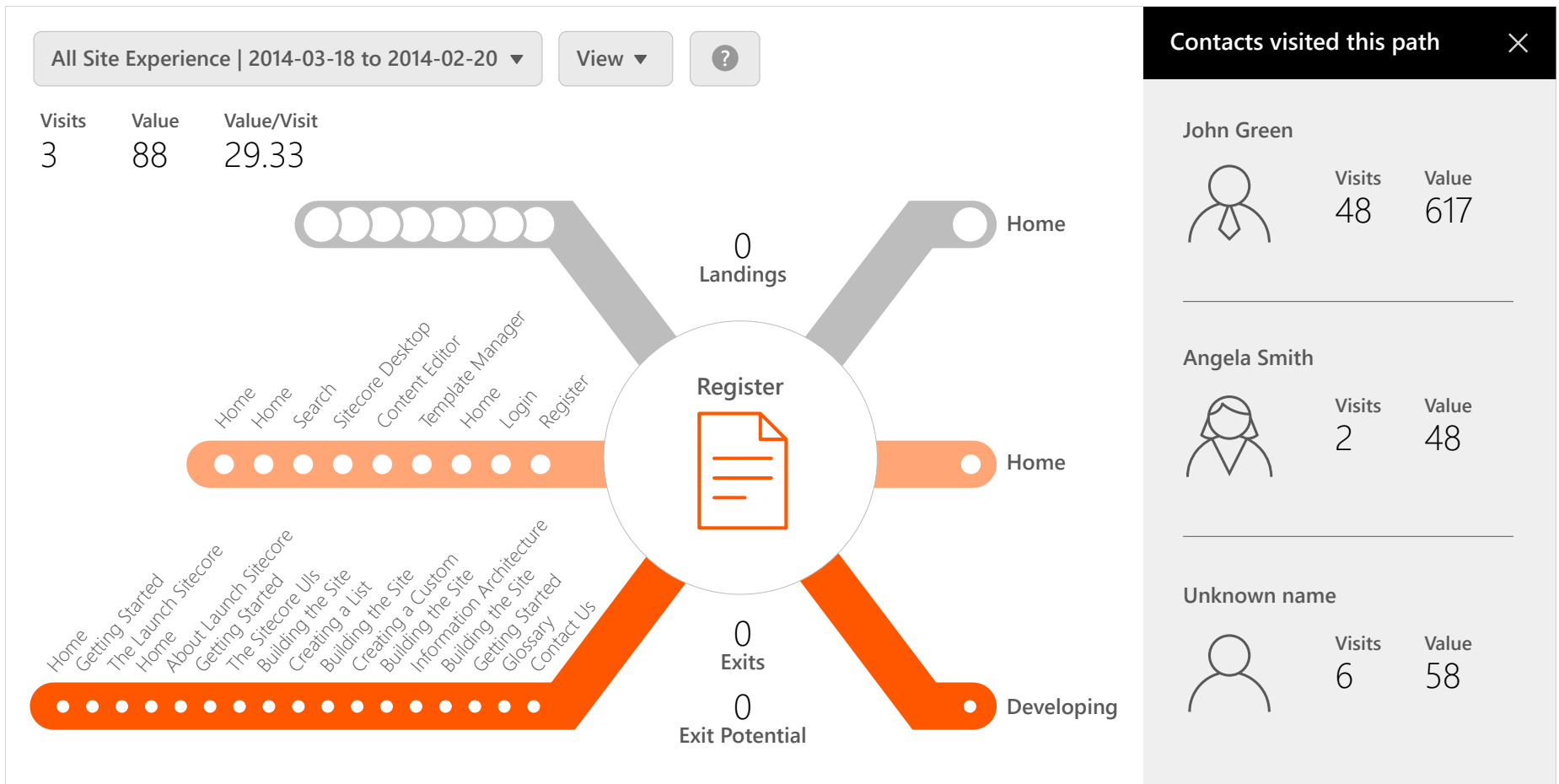
Source: Sitecore, Getting Visual with Sitecore's Path Analyzer Tool, Eric Knutson, December 16, 2015.

2. Get your content strategy in order

The more personalization you aim to implement, the more content you need to source. The primary reason businesses do not implement personalization is because they do not have the content strategy in place to support it.

When you are just starting out, pick an easy element to customize. Maybe it's existing customer vs. unknown user so you can display a pertinent retention offer. The point is to start small as your content map will expand exponentially as you think across content, channels, personas and more.

Follow these tips to avoid the chaos of last-minute content creation.

How fast do personalized elements add up?

Let's say you want to offer a product carousel with three different rules for your site's two personas, with three images for each persona. By targeting two personas with three rules each, the product carousel needs six images.

Add unique copy for each scenario, and your single product carousel now needs twelve + assets (six images + six copy blocks).

2 personas x **3** rules each = **6 images**

6 images + **6** accompanying copy blocks = **12 total assets**
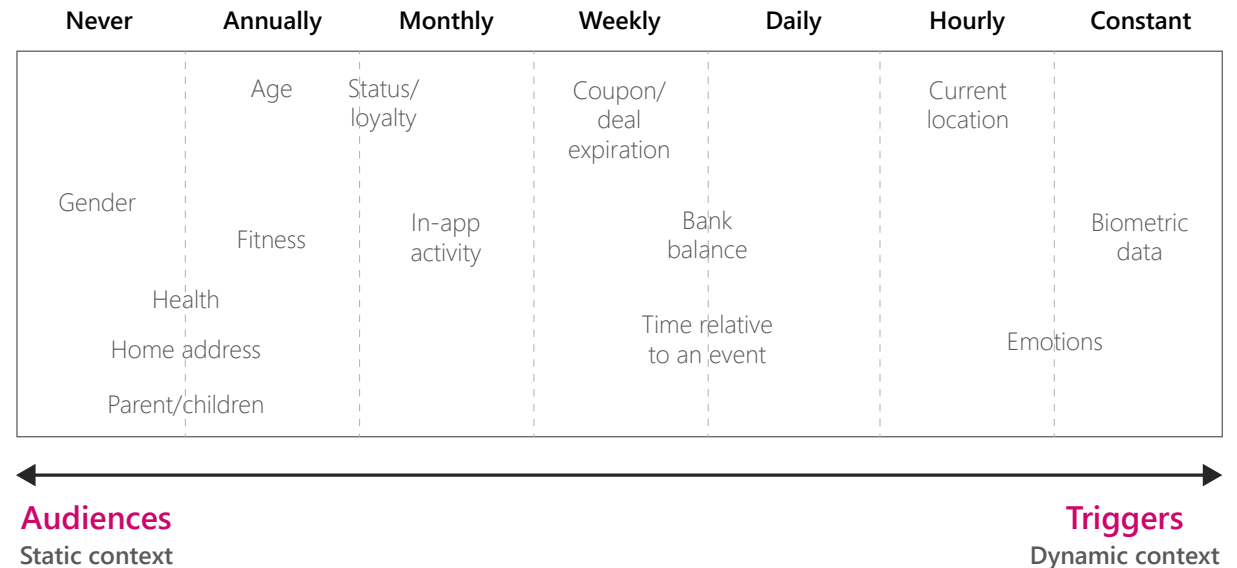
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Understand your customer

Prepare for personalization by planning and using data insights to identify your core personas. Whom will you target and what do you want them to experience? Getting a 360 degree view of your customers – and being able to segment them – should be a fundamental part of your overall customer experience strategy when you're getting started. To get that intel:

• Pull in internally sourced user data or connect third-party sources to extract customer insights from structured (i.e., geolocation, form fills and on-site visitor clicks) and unstructured (i.e., social media) data. For example, Forrester uses context to help with this.[4] What is the context of the journey you are trying to personalize? Are there specific defining moments you want to sharpen and use to build loyalty?

• Conduct the analysis required to identify behaviors and patterns that associate certain preferences and data inputs with your core personas.

You can use context to define an audience or a trigger

Modernize Your Martech Stack For Moments

Never	Annually	Monthly	Weekly	Daily	Hourly	Constant
	Age	Status/loyalty	Coupon/deal expiration		Current location	
Gender						
	Fitness	In-app activity	Bank balance			Biometric data
Health						
Home address			Time relative to an event		Emotions	
Parent/children						

◄──────────────────────────────────────►

Audiences
Static context

Triggers
Dynamic context

Source: "Modernize Your Martech Stack for Moments", Forrester Research, Inc., Joe Stanhope and Julie A. Ask, April 5, 2018.

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Collaborate and schedule

Make sure to have conversations early on with your content creation team about the volume and types of content that will be required, and put a plan in place to deliver.

- By starting small (see element 1), you can build a reasonable timeline for content production and get buy-in from the groups involved – including any third-party (i.e. creative agency) timelines and approval cycles.

- Map out the entire journey with corresponding data (tied to your goals) to build the personalization experience.

- Get everyone on the same page to ensure alignment on the task at hand.

By mapping your user journeys to a refined content strategy, you are laying the groundwork for implementing personalization effectively. With experience and refinement over time, you can accelerate your personalization journey and give your organization the ability to scale.

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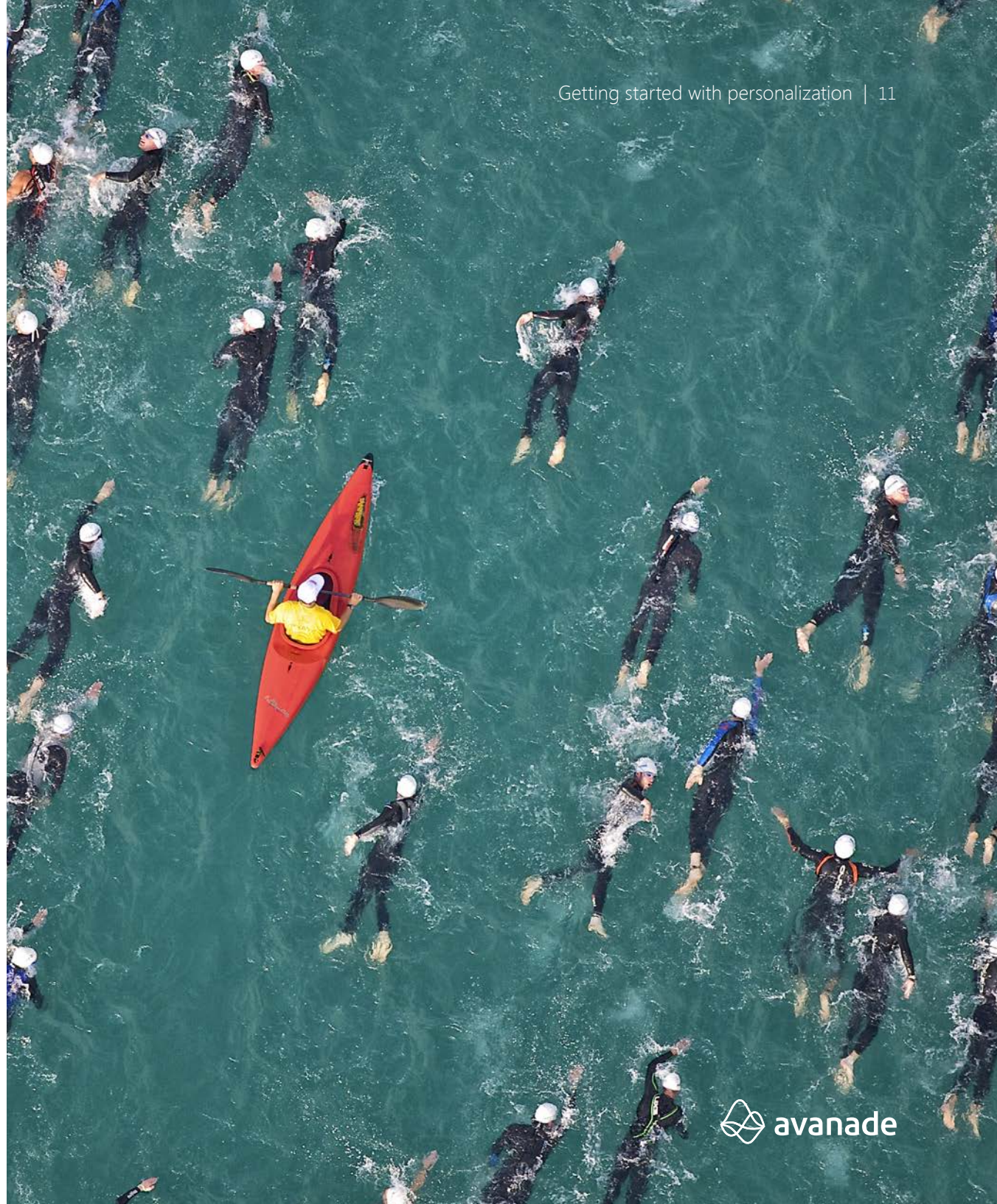
3. Empower the business to own personalization

For the fastest path to personalization at a lower cost, empower your marketing team to manage personalization technology themselves. By selecting implicit personalization on a platform like Sitecore that is intended for non-technical users, your CX or marketing team can start personalizing content without any prior coding experience or knowledge. And while, as Forrester found, first priority for personalization tends to be company websites[6], there are many customer touchpoints the business can (and should) be tailoring to deliver a better overall brand experience.

Reduce code to save time

No coding means no associated dev costs and no additional build, release or test time. Removing that barrier can be a huge time-saver, meaning you can start reaping the rewards of personalization sooner.

Selecting a flexible and comprehensive CX technology platform like Sitecore makes it easier for non-technical employees to drive personalization. Among its benefits are:

- Streamlined workflows that reduce or eliminate cross-organization build, test and iteration cycles
- Complete end-to-end ownership of personalization by the core customer experience team
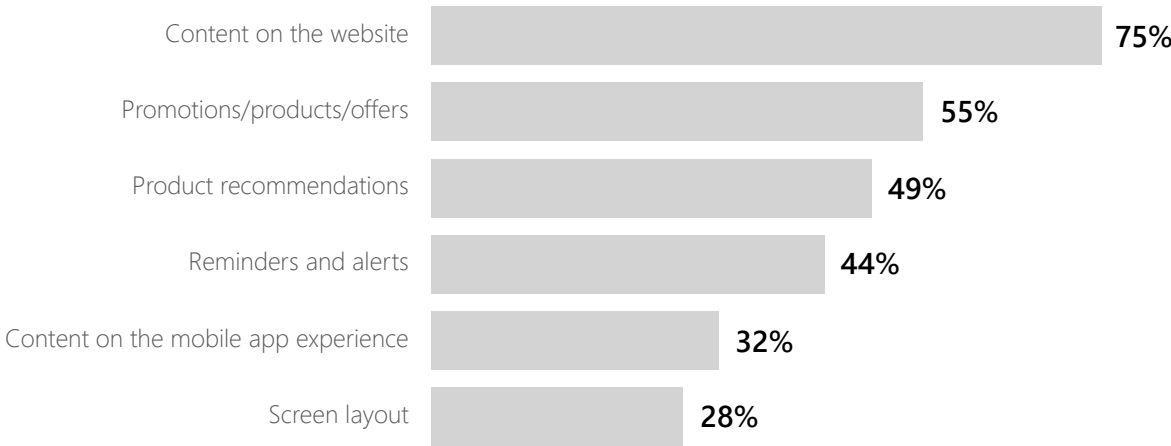- Agility to modify experiences quickly based on changing market or business needs

[6] "Evolve Now to Personalization 2.0: Individualization", Forrester Research, Inc., Brendan Witcher, December 5, 2017

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Online personalization often focuses on specific site modules rather than the whole experience

Evolve Now to Personalization 2.0: Individualization

"What parts of the experience are you personalizing?"
(Multiple responses accepted)

Content on the website	**75%**
Promotions/products/offers	**55%**
Product recommendations	**49%**
Reminders and alerts	**44%**
Content on the mobile app experience	**32%**
Screen layout	**28%**

Base: 70 to 115 digital experience delivery decision makers

Source: Forrester Research, Inc. Forrester's Q1 2016 Digital Experience Delivery Online Survey.

Case study:

Fueling high-octane experiences

Implicit personalization uses data to create relationships between users and web content. When we trained the marketing team at a global oil and gas company to connect their user journey with the data continuously captured in Sitecore, they grew their B2B reach significantly and enjoyed award-winning results made possible by more targeted experiences.

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Get help from experts

If your team needs help getting started, don't go it alone. Team up with a partner like Avanade that has the technical knowledge and complete customer experience strategy required to build compelling personalized experiences. From technical implementation to strategy planning, implicit personalization team training and ongoing managed services, there are many ways to outsource efforts so you can accelerate your time to market.

With fewer roadblocks to enable personalization, you can concentrate on building a more tailored customer experience at speed.

> With execution and strategy equally accessible, the business team that oversees CX can go beyond the basics and ultimately personalize all customer-facing channels (even brick and mortar).

Sitecore Content Editor for personalizing components

Personalize the component	☐ ✕

🔘 Personalize the presentation of the component ➕

Only show brochure to leads — Actions ▾ ⌃

Where the value of the **Lead** profile key in the interaction profile **is greater than or equal to 50**

Edit rule

🔘 Show ⚪ Hide

Content:

[Not set] Home ...

Reach
0%

Effect
=0%

Default ⌃

If none of the other conditions are true, the default condition is used.

🔘 Show ⚪ Hide

Content:

[Not set] Home ...

Reach
0%

Edit rule   Cancel

Source: Sitecore, Walkthrough: Personalizing components, October 18, 2017

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Why Avanade?

We can help you plan, assess and execute personalization so that you can earn more customer loyalty and increase conversions. Leverage our complete end-to-end customer experience expertise and technical knowledge to elevate your customer experience faster.

Why choose to work with us?

We will accelerate your ability to get personalization in motion, leveraging the latest Sitecore, experience design (XD) and content strategy capabilities. We can help you:

- **Understand your users** to create targeted, customer-centric value journeys

- **Build your content strategy** to help your content pipeline support your personalization goals

- **Take advantage of our deep industry knowledge**, proven strategies and best practices to define and evaluate personalization goals

- **Engage with our Digital Studio team of creatives and technologists** who focus on designing, delivering and managing end-to-end CX solutions

- **Test and improve** your personalization components to drive rapid performance

- **Upgrade to the latest Sitecore version to connect valuable third-party data** with experience, assets, goals and more for a seamlessly integrated single-platform approach

- **Train your team** to plan and manage ongoing personalization and customer experience efforts

Avanade at a glance

Sitecore's first Global Platinum Implementation Partner

1,300+ trained Sitecore consultants (more than any other firm in the world)

900+ Sitecore certified developers, 11 Sitecore MVPs

250+ Sitecore clients with projects delivered in 21 countries

21 Sitecore Experience Awards in last 5 years

6 global Sitecore Delivery Centers in five time zones

To learn more about building a better customer experience, visit our Digital Customer page or inquire about a personalization assessment through a CX workshop.

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