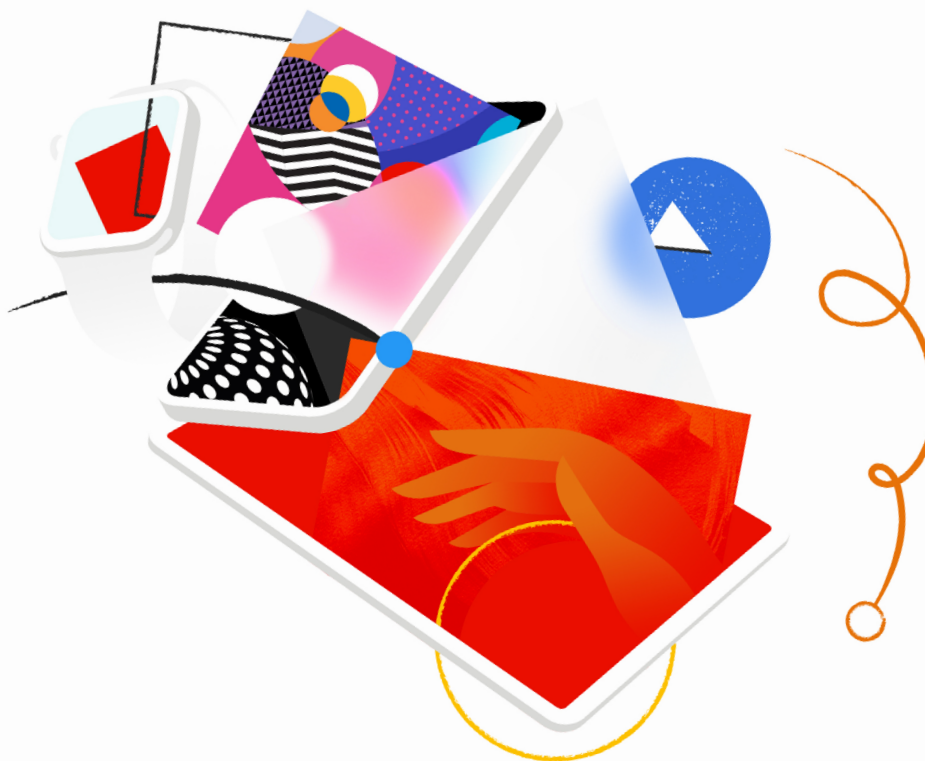





The winning playbook for experience personalization.

Aligning people, strategy, and technology to
deliver impactful, personal experiences.





Fluid experiences for fluid customers.

Improving the customer experience has never been more important. Among emerging marketing capabilities, personalization ranks as the top opportunity to drive better customer experiences. However, poor personalization can hurt your bottom line, leading customers to switch from companies that fail to meet their expectations to those that do.

In this playbook, we provide clear guidance to help you build a winning personalization strategy for your organization over three phases of maturity:



Engage:

Getting started and laying the foundation



Expand:

Growing in sophistication across channels and use cases

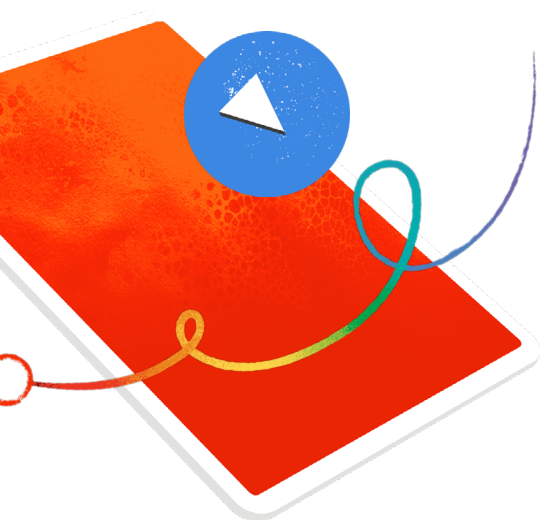


Embed:

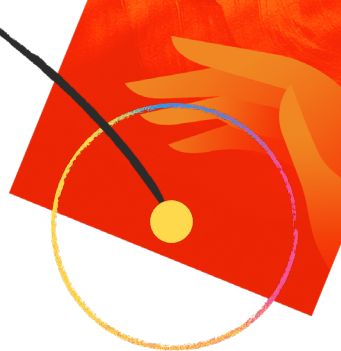
Scaling up and achieving excellence

For each phase, we describe three key building blocks for achieving success: people, strategy, and a technology foundation. In particular, the technology foundation should provide a scalable platform to support data, content, and intelligence capabilities spanning all digital touchpoints. Artificial intelligence (AI) has become a preferred method for scaling the delivery of experiences to millions of customers, in ways that increasingly look like what used to be the holy grail—true one-to-one personalization.

To become a center of excellence (COE) for personalization, you need to establish a framework that empowers teams across the enterprise while maintaining governance over processes and your technology foundation. Adobe can help as your trusted partner for personalization.



The business value of personalization.



In the quest to improve customer experience, organizations are investing in personalization strategies that span multiple touchpoints in the customer's journey. We've long known that every person wants to be treated as a unique individual by the brands they trust and engage with, but we now also know that brands that do engage in such a personal way greatly outperform those that don't.

Personalization has become the expectation.

Salesforce recently found that for the first time ever, a majority of customers—52 percent—expect offers to always be personalized. Yet 66 percent of customers say they're still generally treated like a number rather than an individual. According to Gartner, this disconnect means brands risk losing 38 percent of their customers because of poor marketing personalization efforts, such as delivering irrelevant experiences and insensitive messages or using personal data without consent.

Personalization plays an outsized role in growth.

According to an Advanis survey commissioned by Adobe, organizations that extensively personalize their messaging report an ROI in excess of 20 times for every dollar spent. Personalization also improves customer loyalty, retention, and conversion rates. Adding personalized experiences to marketing campaigns, website and mobile experiences, and internet-connected devices can lead to significant revenue growth for your organization.

Personalization maturity model: Engage, expand, and embed.

Personalizing customer experiences across multiple touchpoints requires a clear strategy. But where should you start? We recommend that you engage your organization and build a foundation for personalization. The plan should establish the right **people, strategy, and technology foundation** for the long term. As you mature, this foundation will help you expand personalization efforts across all channels and use cases. Over time, you'll become a COE for personalization initiatives across the entire enterprise.

Let's dig into what you need to know for each stage of your personalization journey and explore the key building blocks for your technology foundation and capabilities for data, content, and intelligence.



Engage people.

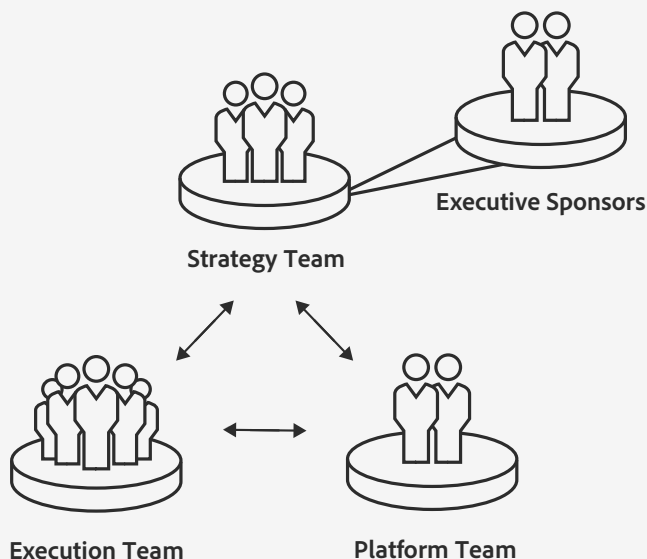
To form your personalization team, your organization must invest in the right people. What are the key roles and responsibilities? What initial activities can they focus on to drive quick wins for the business? It doesn't require many people to begin a program. Most begin and remain at one to two primary or part-time staff. It's the roles and responsibilities that are key.

Build your team and assign their roles.

First, secure an executive sponsor who can help evangelize the program benefits, benchmarks, and successes with C-level and VP-level stakeholders. This sponsor can help you establish a strong strategy going forward, as well help other stakeholders connect the dots between the personalization program and the resulting business value.

Next, identify a program owner or lead who can drive the overall personalization strategy. And then support this program owner with execution resources in marketing, data science, development, quality assurance, and project management. The owners of your technology platforms should be a vital part of the extended team, given personalization's reliance on technology systems.

Example of a team framework



“

Adobe helped us realize that the roles we'll need for executing best-in-class digital marketing are going to change. We need to start thinking about these roles, like data scientists, for the future while creating this new system now.”

Paz Macdonald

Chief Marketing Officer, Software AG



Engage strategy.

Your organization seeks to develop a comprehensive, forward-thinking personalization strategy that moves away from tactical, ad hoc campaigns. To go beyond basic website A/B testing, you need to establish a broader set of goals and objectives for personalization across different touchpoints.

Set appropriate goals and benchmarks.

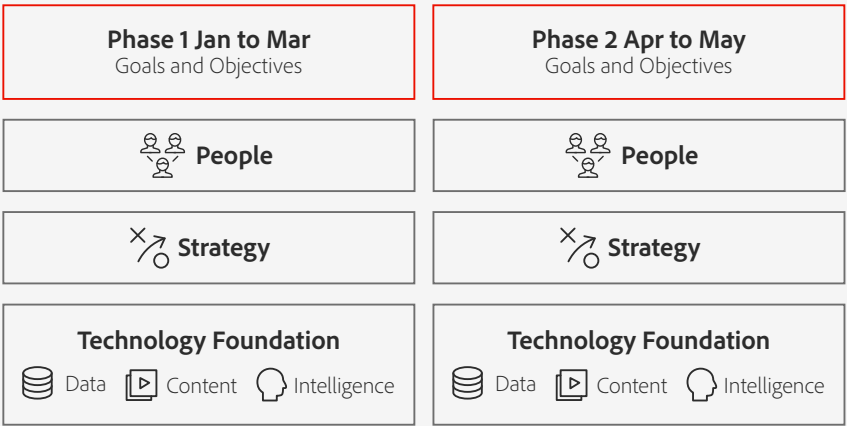
In addition to conversion rates, define goals and KPIs that measure other aspects of your business. For example, personalization reduces the bounce rate—the number of visitors who leave your website after viewing one page—and drives deeper engagement. Personalization also reduces the cost of serving your customers. For instance, providing a personalized customer support experience through your mobile app can reduce calls to your support center.

Your analytics team is an essential stakeholder and collaborator that can provide key metric definitions as well as the data you need to identify high-value behaviors that can be driven through personalized experiences. After defining a comprehensive set of KPIs, establish benchmarks for quarterly reviews to assess your current performance and find places to improve.

Draw out your roadmap.

Create a program roadmap that defines a timeline and describes the strategy, people, and technology platform for attaining your most important objectives. By tying your goals to a specific timeframe, you can begin to assess resource requirements and dependencies.

Example of a program roadmap



“

We were able to segment customers based on their average order value and expose them to the right discount level. Through that one promotion alone, we fully paid for our investment.”

Linden Martin

Head of CRM and Customer Experience, Petbarn

Hit the ground running.

With your team in place, brainstorm ideas for achieving the initial goals of your program and evaluate the cost/benefit of each idea. Some initial quick-win opportunities may include:

- Personalized landing pages for campaigns based on referrer and behavioral profile data.
- Targeted offers based upon category affinity, such as the type of product a customer keeps coming back to on your site.
- Recommendations for relevant promotions, content, or product suggestions and continuity across multiple visits.
- Remarketing and retargeting offers and recommendations via offsite channels, email, or return visit.

Get familiar with your toolset.

As you select and deploy tools for your personalization program, plan for product training. This training will ensure that team members can use features correctly and apply their knowledge. Your team needs to understand how product capabilities can support your top priority ideas and use cases.

Quickly prove the program's worth.

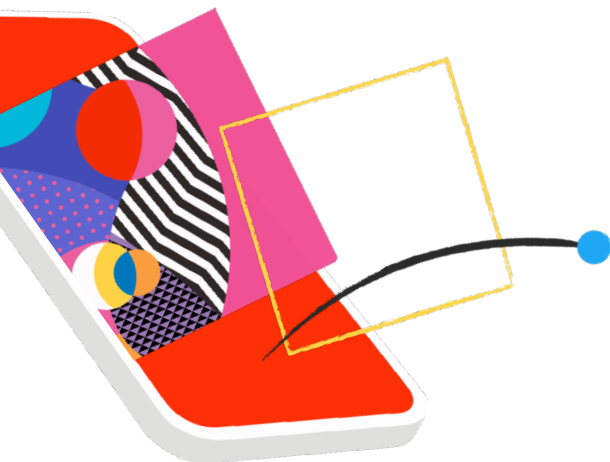
After reviewing and prioritizing your ideas for personalization, select and execute quick wins that let you easily demonstrate the value of your program.

Spread the word.

Share and evangelize early wins with your executive sponsor and key stakeholders. Focus on telling a success story that is supported by metrics and insights. Find opportunities to share stories more broadly across the organization and celebrate your successes with your team. Some of the best organizations make presenting these successes as visually impactful as the work they put out into the world. You can create your own PowerPoint templates or build case studies showing your results in a way that makes them easy to digest.

Hold yourself accountable.

Conduct quarterly reviews to evaluate your current performance in terms of activities, processes, and results. Once you know where you stand, you can establish new benchmarks for maturing your program.





Engage a technology foundation.

To support your goals and use cases, your technology systems need to provide foundational capabilities for data, content, and intelligence.

Start with respecting your customers' data.

Personalization use cases begin and end with ensuring you have a trust-based relationship, where customer and brand are equal parties to a shared profile that delivers a better customer experience. This will require a robust first-party data identity strategy that delivers legitimate value to customers in exchange for their data.

Keep track of all that content.

To deliver personalized offers or landing pages, you need a content management system (CMS) that supports variations of digital assets, such as images, videos, and dynamic media. In addition, these assets should be optimized for viewing on multiple screen sizes and device types.

You'll also want to harness the power of a digital asset management (DAM) system. A DAM supports the upstream creative process for content, including robust capabilities like workflows, content reviews and approvals, and integration with creative toolsets.

This allows you to combine or remix assets to create new content or updated versions of existing content to deliver personalized experiences with more granularity.

Harness human and artificial intelligence.

The business logic for choosing which experience to present to a consumer can be defined using two primary methods:

- **Marketer intelligence:** Business rules are created by marketers to deliver the appropriate experience to specific audience segments (e.g., people who visit a travel website from Chicago will only see discounted airfares departing from O'Hare and Midway airports.)
- **Artificial intelligence:** Automation using AI and machine learning algorithms decides the best experience for the user. For example, AI can automatically personalize banners for each website visitor or even personalize the layout of the entire page and multiple content areas based upon the individual's unique profile and interests.

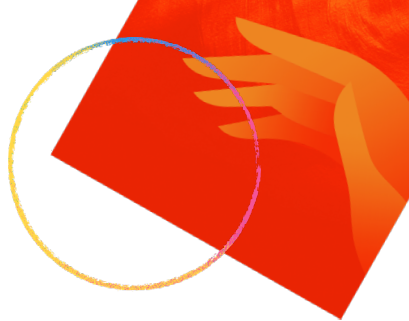
Most teams start with marketer intel, but as they expand, they begin to find a balance between the two methods and choose the right approach for a specific use case.



We don't separate what we do into IT and marketing. Instead we work as a team, focusing on the customer journey and the experience we want to provide."

Francesco Tinto

Global CIO, Walgreens Boots Alliance



Expand people.

After you have successfully executed some quick wins and evangelized the program's success, it's time to expand your personalization efforts across channels and use cases. First, identify key stakeholders responsible for channels or business teams, including websites, mobile apps, email, and paid media advertising.

By partnering with channel stakeholders, you can enrich your customer's journey with personalized experiences across new touchpoints. As you did during the "engage" phase, brainstorm additional use cases that generate ROI for your business while offering memorable experiences for your customers.

Expand strategy.

Harness the expertise of new stakeholders to broaden your efforts, utilizing the strengths of new channels or teams to build even more robust personalization. Enhance your program roadmap with predictive analytics to determine the propensity of visitors to convert based upon key attributes. For example, visitors from email campaigns within a certain age group who view more than three pages are more likely to buy items from category A.

Once you understand the key attributes of high-value customer segments, you can use personalization techniques to promote the right content to them. You should also fine-tune your processes with advanced reporting and insights. For example, seek personalization insights to understand how AI activities are generating lift by exposing key attributes used in modeling or valuable segments the model discovered.

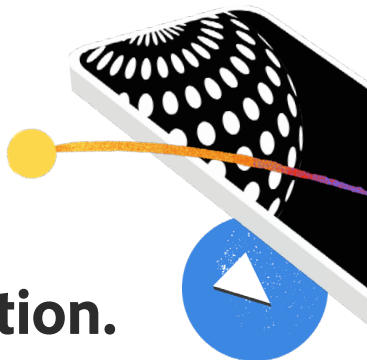
Adobe Sensei

Adobe Sensei is the technology that powers intelligent features across all Adobe products to make effective personalization at scale a reality.

Adobe Sensei supports your personalization efforts in key areas:

- **Analytics:** Adobe Sensei allows you to predict customer behavior based on a wealth of integrated data.
- **Engagement:** Adobe Sensei engages your customers with custom offers, subject lines, and delivery timing, choosing the best-performing experience in line with your goals.
- **Scale:** Adobe Sensei uses real-time intelligence to monitor performance, optimize, and efficiently deliver one-to-one experiences at scale.

Expand a technology foundation.



To support more sophisticated use cases across channels and devices, you'll need to ensure that your foundation can support additional capabilities.

Manage expanding datasets.

For relevant experiences across multiple channels, establish a unified visitor profile that provides a 360-degree view of the customer. In addition, to help manage these data sets and audiences, you may invest in a customer data platform (CDP) to support digital advertising and marketing use cases. A CDP creates unified customer profiles that use a shared single source of truth, allowing you to deliver individualized experiences that adapt to customer preferences in real time.

Adapt content to new interfaces.

To support content across channels, your content management system will need to provide flexible interfaces to support channels beyond websites such as mobile apps, email, display ads, and employee intranets.

Intelligently refine your message.

Both marketer-defined and AI-powered rules will need to work together to further personalize messages and experiences across channels.

Your goal is to deliver relevant, timely messages that align with the customer's channel preferences. Consider creating A/B and multivariate tests to learn the most effective combination of content, layouts, UX, and more.

Responsible data collection in a cookieless world.

By early 2022, all major web browsers will have phased out third-party tracking cookies to respect the growing call for customer data privacy. This will fundamentally reshape how brands engage with customers.

The loss of these cookies presents an opportunity to provide a smaller group of high-value customers with higher caliber and increasingly personalized experiences—in other words, to replace indiscriminate targeting with real value at every step of the customer journey.

Here are four crucial steps for succeeding in a cookieless future:

- 1. Understand your data across the customer journey.** The ability to understand interactions with a prospect or customer in the context of their whole journey is crucial. Every click must deliver value to them while helping you understand who they are, what they've already done, and what they want to do now.
- 2. Own your customer identity.** Instead of relying on a vendor to create customer IDs for you, keeping your customers' identities

in-house can future-proof your marketing technology, including personalization. This flips the relationship where vendors rely on you to get access to customer IDs.

3. **Personalize messaging and content in real time.** Deliver real-time personalization that changes on the fly in response to live behavior and user choices alike to convert more prospects into loyal customers.
4. **Expand, acquire, and attribute.** Create lookalike segments based on your first-party data, and then layer in second-party data to expand your target market.





Embed people.

As the COE for personalization, you can now establish a framework that empowers teams from across the enterprise. Ideally, you establish a federated program that provides enterprise governance and administration for your processes and technologies. For example, new teams embarking on personalization projects can check in with the COE for best practices. The COE can also act as the central administrator for your personalization technology and grant access to authorized individuals.

Embed strategy.

With teams set up for success for their own personalization efforts, the COE can focus on broader strategic initiatives and use cases that span multiple business units and channels. For example, use cases can move “beyond the browser” and focus on personalization-everywhere initiatives that reach new devices, such as connected home assistants or point-of-purchase kiosks. Examples include experiences like augmented reality “fitting rooms” that can suggest items that complement your existing wardrobe, or time-sensitive offers that trigger when a customer is near a retail location.

Personalization cannot exist without customer trust.

The term *experiential privacy* means that when done right, privacy is a positive part of the experience and further delights the customer. When defining a customer journey map, marketers guided by experiential privacy are thoughtful about what data they collect, provide easy-to-understand notices about how that data is used at meaningful points along the journey, and offer consumers choices about how their data is used. For example, a travel company can explain through a just-in-time notice within its app why access to GPS data is needed to help users find their cars upon returning from a trip.

Adobe's four guiding principles on privacy and responsibly unlocking the power of data are to:

1. Design our products and services with privacy in mind.
2. Protect and respect the data entrusted to us.
3. Build and sustain trust with our customers—and help our customers build and sustain trust with their consumers.
4. Grow Adobe's strong privacy partnership with our customers.



Embed a technology foundation.

To achieve one-to-one personalization at scale, your systems need to accomplish the following:

Maintain high-quality data and privacy standards.

Your unified visitor profile will continue to expand as you add new data sources for channels beyond the website. In addition, data governance becomes more critical as you focus on maintaining high quality of data for existing sources and tackle requirements for managing sensitive personal information such as GPS location. Follow best practices for experiential privacy and partner with your legal and privacy team to ensure that your privacy standards remain up to date and consumer trust is not broken.

Make content easily accessible, even at scale.

For personalized one-to-one experiences, your content management system needs to support thousands or millions of asset variations. However, manually tagging images with descriptive and contextual metadata is tedious, inconsistent, and often incomplete. You need AI-powered smart tags that can provide consistent content-based metadata in seconds. And automated workflows can bring new and revised assets in line with your existing content.

Let AI fill in the gaps.

Your personalization technology will provide algorithms that are designed to support one-to-one experiences. If you have the right data and content platforms in place, your AI technology will provide the brainpower to intelligently orchestrate experiences that are tailored to individual preferences and behaviors.

Deploy to new technologies and interfaces.

To enable personalization-everywhere initiatives, your systems will provide APIs that can establish connectivity to new touchpoints, including IoT (Internet of Things) and OTT (over the top) platforms, smart cars, VR/AR (virtual reality, augmented reality) applications, soft drink machines, digital assistants, kiosks, gaming consoles, and point-of-sale (POS) devices.



Customer success: Ben & Jerry's caters to customers' tastes.

With 38 markets across the globe and more than 150 ice cream flavors, Ben & Jerry's has a flavor that's guaranteed to hit the spot. But with that many options, it's easy to turn off a Cherry Garcia fan by showing them a scoop of Chunky Monkey. With the launch of their new ice cream delivery app, they needed a simple way to personalize assets based on their customers' favorite flavors.

Challenge: Deliver personalized imagery that puts customers' favorite flavors front and center, across the web.

Solution: Adobe Audience Manager gathers information about flavor preferences from customers who visit the Ben & Jerry's website. Adobe Target makes it simple to remarket to customers using assets that reflect favorite flavors.

Results: Despite the many changes 2020 threw their way, Ben & Jerry's is only growing stronger. There's been 50 percent growth in their delivery app downloads featuring content personalized with each user's most interacted-with flavor.



Walgreens Boots Alliance

Customer success: Walgreens Boots Alliance (WBA) creates a next-gen digital pharmacy experience.

In 2020, Walgreens and Boots pharmacies' 120 million worldwide customers across 10,000 storefronts faced an uncertain healthcare landscape. The WBA's global CMO and global CIO were tasked with reinventing the pharmacy experience to make their services even more personal and, crucially, convenient.

Challenge: Delivering high-quality, hyper-personal customer experiences on a global scale at a time when in-pharmacy interactions were necessarily minimized.

Solution: Adobe products allowed WBA to build intelligent customer segments for their retail operations. Adobe Experience Cloud serves customers personalized recommendations based on past purchases, right when they're about to run out of a product they've relied on regularly for years.

Results: Whether it's a 24/7 pharmacist live chat, individualized wellness recommendations, or simply adding ease and speed to filling prescriptions, every small step forward adds up. With the help of Adobe, Walgreens Boots Alliance is now leading the way toward a future of more individualized, convenient medicine.



Customer success: Software AG pivots to customer-centric experiences, at scale.

As one of the most storied software vendors in the world, Software AG has been driving connections through technology since 1969. But information spread across 250 webpages accumulated over the years failed to tell a cohesive story, let alone offer personalized recommendations to customers looking for a specific solution.

Challenge: Optimize disjointed customer journeys across all web experiences with personalization built into the foundation.

Solution: Adobe Experience Cloud helps Software AG deploy a more informed, customer-centric approach to marketing campaigns, each aligned to a unique customer journey.

Results: Software AG's website now takes each customer through a tailored journey that matches their persona with personalized end-to-end content. Campaigns are now constantly optimized with the help of biweekly customized reporting highlights. All 250 webpages now share a unified, worldwide platform. With the help of Adobe, Software AG can begin a five-year digital transformation journey with a solid, customer-centric foundation beneath their feet.



Customer success: Petbarn translates its beloved in-store experience to the web.

With 250 stores across Australia, Petbarn is like a second home for pet owners down under. The key to its success lies in an in-store experience that's big on personal touches. Over the past year, the retailer has accelerated its digital transformation with a focus on replicating that great in-store experience online, primarily through a new same-day delivery service.

Challenge: Make shopping on Petbarn's website as easy and personal as it is in store.

Solution: Adobe Target allowed Petbarn to stage a narrow rollout of same-day delivery offerings to specific audience segments before expanding the service nationwide.

Results: Petbarn tripled its online sales in a single year, while maintaining the same level of industry-leading customer service. Same-day deliveries are now a significant part of its online business. Conversion rates have increased more than 40 percent from a year ago. In addition, its new live chat service has a 92 percent positive rating from customers, showing just how committed Petbarn is to excellent customer service.



Let's recap.

Personalized experiences drive tangible business value for your organization while delivering customer delight across touchpoints. You now know that your personalization strategy requires comprehensive planning of resources and technology over three phases of maturity: 1. Engage, 2. Expand, and 3. Embed. For quick reference, here are the steps we recommend taking to achieve success:

Start by laying a foundation.

Your personalization program needs to establish three key elements: people, strategy, and a technology foundation. Since you are planning for the long term, the technology foundation should provide a scalable platform to support data, content, and intelligence capabilities.

Execute quick wins.

After reviewing and prioritizing your ideas for personalization, select and execute quick wins that let you easily demonstrate the value of your program.

Evangelize impact and success.

Share and evangelize early wins with your executive sponsor and key stakeholders. Find opportunities to share stories more broadly across the organization and celebrate success with your team.

Expand across channels and use cases.

After some quick wins, expand your personalization efforts across channels including websites, mobile apps, email, and paid media advertising. Explore and enrich your customer's journey with personalized experiences across touchpoints.

Focus on scale and excellence for the long term.

To become a COE for personalization, establish a framework that empowers teams from across the enterprise. The COE can focus on broader strategic initiatives that span multiple business teams and channels.



Adobe can help.

Adobe Experience Cloud is an integrated set of solutions to build campaigns, manage your advertising, and gain deep intelligence about your business. And it's all unified through powerful core services that give you access to your customer profiles, centralized assets, powerful tagging, and an ecosystem of partners and developers to extend the value of all the solutions. It's everything you need to orchestrate a great customer experience.

Adobe Experience Platform is an open system that transforms all your data—from Adobe and elsewhere— into robust customer profiles that update in real time.

Adobe Experience Sites and Assets combine AI-powered CMS and DAM systems to manage, iterate, and deploy content at scale.

Adobe Analytics allows you to analyze data from any channel, anywhere along a customer's journey to gain fresh, up-to-the-minute insights on their current and future behavior.

Adobe Journey Optimizer lets you manage one-to-one moments for millions of customers with intelligent decisioning and insights.

Adobe Target is a complete optimization solution that allows data-driven marketers to rapidly experiment and create high-converting personalized experiences.

Learn about how you can succeed with personalization.

[Learn more](#)

Sources

- 1 ["Building a pharmacy fit for the 21st century,"](#) Adobe customer story for Walgreens Boots Alliance, 2021.
- 2 ["For Software AG, forging customer connections begins with thinking differently,"](#) Adobe customer story for Software AG, 2021.
- 3 ["Gartner survey shows brands risk losing 38 percent of customers because of poor marketing personalization efforts,"](#) Gartner, March 11, 2019.
- 4 ["How Ben & Jerry's is leading the virtual photography revolution,"](#) Adobe customer story for Ben & Jerry's, 2021.
- 5 ["Petbarn makes online shopping easy for pet owners, even during a pandemic,"](#) Adobe customer story for Petbarn, September 10, 2020.
- 6 ["State of the connected customer,"](#) Salesforce, October 2020.
- 7 ["Survey of marketers and consumers 2020,"](#) Adobe personalization survey, February, 2020.



© 2021 Adobe. All rights reserved.

Adobe, the Adobe logo, are either registered trademarks or trademarks of Adobe in the United States and/or other countries.