



GUIDE

The definitive guide to web personalization.



Table of contents

Make your web presence personal.	3
Understand the essential nature of web personalization.	5
Explore the benefits of web personalization.	10
Build your marketing strategy around web personalization.	14
Integrate cross-channel marketing into your web personalization strategy.	35
Use content to deliver a personal web experience.	43
Test, refine, and improve your web personalization.	56
Gather your web personalization team.	64
Build your web personalization toolbox.	68
Strengthen your relationship.	70

Make your web presence personal.

As a marketer, chances are you're not sending an identical email to everyone in your database, even if you know it produces results. Your database is made up of many different segments and types of customers. Some people may be new to your product or service, while others are long-standing customers. Sending the same communication, offer, or content piece to everyone just wouldn't be effective.

But most marketers are doing this on their websites daily. They deliver the exact same experience to every visitor, every time, regardless of their behavior or attributes. And each month, it's repeated tens of thousands of times.

Although marketers understand how damaging a repetitive experience is for email, this thinking often doesn't extend to their websites. This is a big mistake when you consider how much of your audience is potentially alienated by an impersonal website experience.

If your marketing activities aim to increase key metrics—such as conversion, engagement, and average order value—failing to deliver a personalized customer experience can have a measurable impact on your bottom line.

By creating a personalized website experience, it can enhance the effectiveness of all your subsequent marketing activities. In a recent report by VB Insight, they found 87% of companies see a lift in key performance metrics when they adopt a personalized engagement approach. Within this group, 2 in 5 see an uplift of more than 20% in key metrics. By not connecting with your customer on an intimate level, it ultimately means lost revenue. Yet fewer than 1 in 5 marketers take advantage of web personalization to improve their results.

Additionally, today's consumers are accustomed to instant gratification at every stage of the buyer's journey. The modern shopper is more informed, more selective—and more likely to say no. And since they are inundated daily with marketing messages, only the most targeted, relevant communications earn their attention. If your website doesn't immediately address their needs, they'll look to your competitors for what they need.

To accelerate engagement, conversion, and retention, your website must deliver meaningful experiences for every customer. This means web personalization must become an essential part of your marketing efforts.

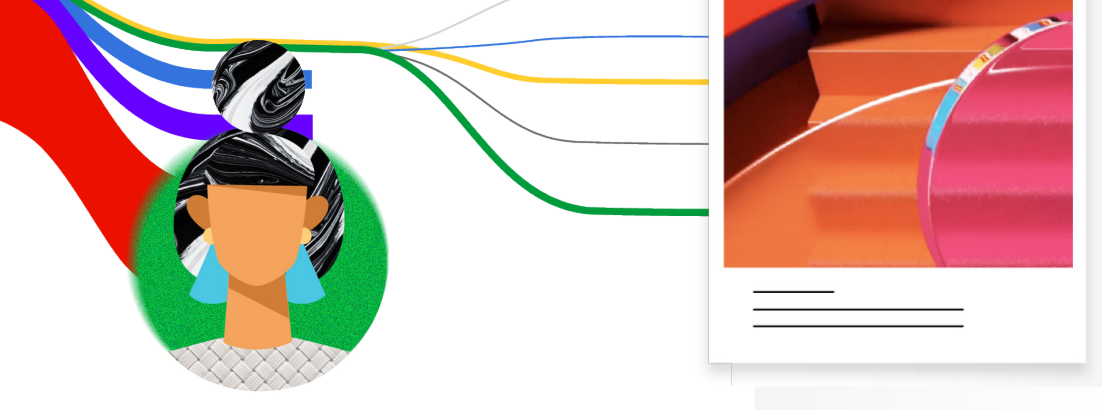
This guide is intended for all marketers who use—or are considering—personalization on their website and digital channels. We'll provide a thorough overview of web personalization for marketers at all levels, as well as create a personalization framework to effectively engage your audience.



What we'll cover in this guide:

1. **Understand the value of web personalization.** Using web personalization to create a dynamic, relevant web experience for your existing and prospective customers.
2. **The benefits of web personalization.** How continuous, personal experiences to individual visitors at scale, increase brand loyalty, conversion rates, and average order value.
3. **Create a web personalization strategy.** Defining your web personalization goals, examining use cases, and identifying early metrics to track.
4. **See how web personalization fits with cross-channel marketing.** Learn how web personalization complements your existing campaigns across other marketing channels to create a consistent user experience.
5. **Select the right message.** Create the right content for your web personalization activities and identify where it will perform best on your site.
6. **Test and fine-tune.** Using ongoing tests and refinement to learn which experience improvements can make the biggest impact.
7. **Measure your web personalization activities.** Examine the different metrics you can use to measure success, from engagement to conversion.
8. **Build your team.** Equipping your team to use web personalization effectively, regardless of your team size.
9. **Learn about personalization tools.** Identifying and using technologies which support and integrate with web personalization tools.

Use this guide to help you get started, make your web personalization more effective, and generate revenue. Mark it up, share it, and let us know what you think.



Understand the essential nature of web personalization.

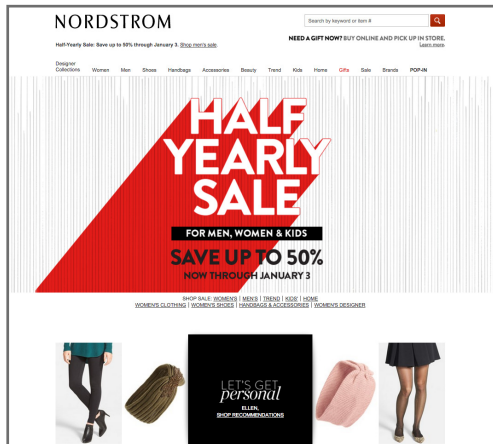
The term “web personalization” refers to creating dynamic, highly relevant website experiences for prospects and customers based on their behavior, location, profile, and other attributes. Web personalization is about understanding consumer needs and then tailoring your website to provide relevant content, offers, and calls to action.

Web personalization delivers relevant experiences to your visitors based on who they are and what they do, whether said visitor is anonymous, a known contact, or a loyal customer. This personalization centers primarily on your company’s website, which is the most important point of engagement with your customers, especially in terms of conversion. According to a DemandGen report, 70% of buyers indicated a vendor’s website was the most influential channel in making a purchase decision.

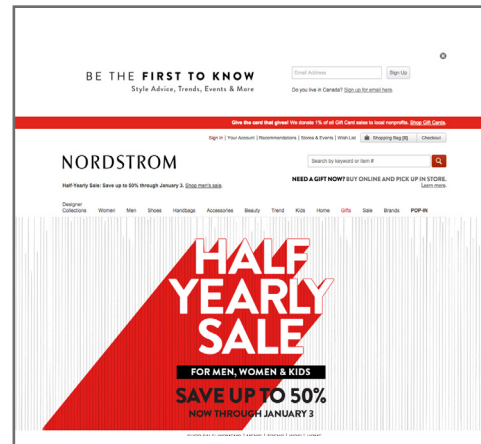
As a consumer, you’ve probably encountered some form of personalization before. If you’ve clicked through Netflix or Amazon, you’ve seen personalized recommendations based on your previous selections and reviews. Consider the convenience of having a product or information you need displayed the moment you arrive to a website. Contrast this with the frustration of combing through multiple menus and pages to find what you need. Unsurprisingly, the public prefers the latter experience.

Web personalization in action.

Let's examine a few examples of personalization utilized by different businesses. In the first example, you can see the difference between Nordstrom's homepage which is personalized based on a shopper's past purchases and searches versus the same area of the page which is not personalized.



Homepage with personalized recommendations.



Homepage without personalized recommendations.

In the second example, a B2B brand uses web personalization to target visitors by location. We can see personalization triggered by a web tool which instantly identifies the visitor's location and presents them with a relevant message—in this case, to attend a conference in their region.



Web personalization on the SchoolDude homepage

Web personalization for everyone.

It's often assumed personalization is a complicated, time-consuming project suited only for large, well-funded organizations—especially given the complexity and traffic volume of some websites. But, with the right tools in place, personalization can be a simple process which dramatically increases the effectiveness of your website and cross-channel marketing programs. In many cases, even with limited resources, the ROI for web personalization is higher than traditional marketing programs.

Effective web personalization makes real-time changes to your website based on a visitor's attributes and behaviors. These changes occur in milliseconds to deliver a personal experience at the exact moment prospects and customers land on your site.

Making an impact.

Marketers primarily use personalization to make their website more effective at engaging, converting, and retaining prospects and customers. Whether or not a prospect or customer is aware of the personalization occurring, the experience can make a significant difference in the appeal and success of your site.

According to research from MyBuys, 40% of consumers buy more from retailers who personalize their shopping experience across channels. We also found that visitors presented with personalized content are five times more likely to convert than the average visitor.

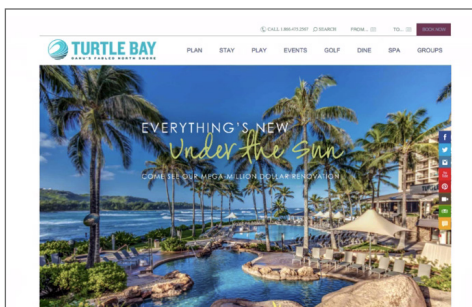
Whether online or offline, customers expect brands to listen and respond to their activities with relevant messaging and offers.

As a marketer, implementing web personalization is one of the most impactful activities you can initiate.

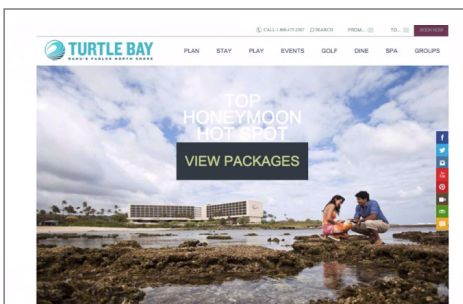
Your website exists to attract visitors and convert them into loyal brand advocates. Although the need for personalized experiences stretches beyond your website, most online channels should ultimately lead customers back to it.

For instance, if a person visits your site with web personalization implemented, you could identify the visitor's attributes such as buying intent, behavior, persona, geolocation, and firmographics. Based on those attributes, you could then present them with the most relevant copy, imagery, offers, and calls to action, creating a customized visitor experience.

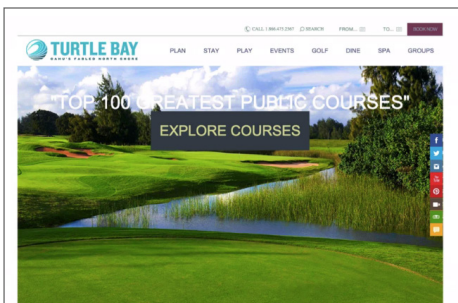
The examples we're including on this page from Turtle Bay demonstrate how they use web personalization to present different messages to visitors based on their previous activity. A web personalization tool adapts the homepage to the interests and behavior of visitors based on the search term they used to arrive on your site. For instance, one visitor might be looking for a golf resort and another might be searching for a honeymoon destination and so the first page they visit on the site would be instantly tailored to their interests.



Homepage of standard Turtle Bay website.



Homepage personalized for a "honeymoon vacation" search.



Homepage personalized for a "golf vacation" search.

What are firmographics?

Firmographics are data points which give you more insight into the organization or company associated with a visitor. For B2B organizations, this can be helpful to understand if your target audience is visiting your website while helping you identify the types of companies to pursue. Examples of firmographics include:

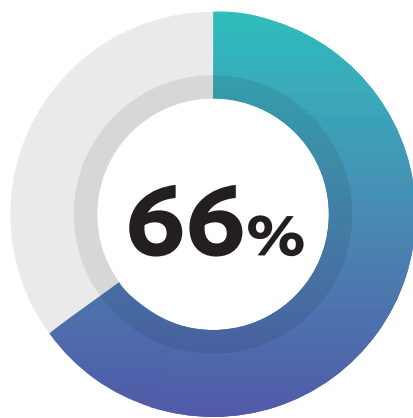
- Company name
- Industry
- Size (for example, number of employees)
- Revenue
- Founding date
- Market cap

Building personal relationships.

Failing to personalize your website can create a disconnect with your customers, resulting in missed opportunities. According to Janrain and Harris Interactive, 74% of digital consumers get frustrated with websites with displayed content—such as offers, ads, and promotions—which has nothing to do with their interests. Considering how awkward this lack of personalization would be in a real-world social interaction, you can understand how crucial it is to listen and respond personally.

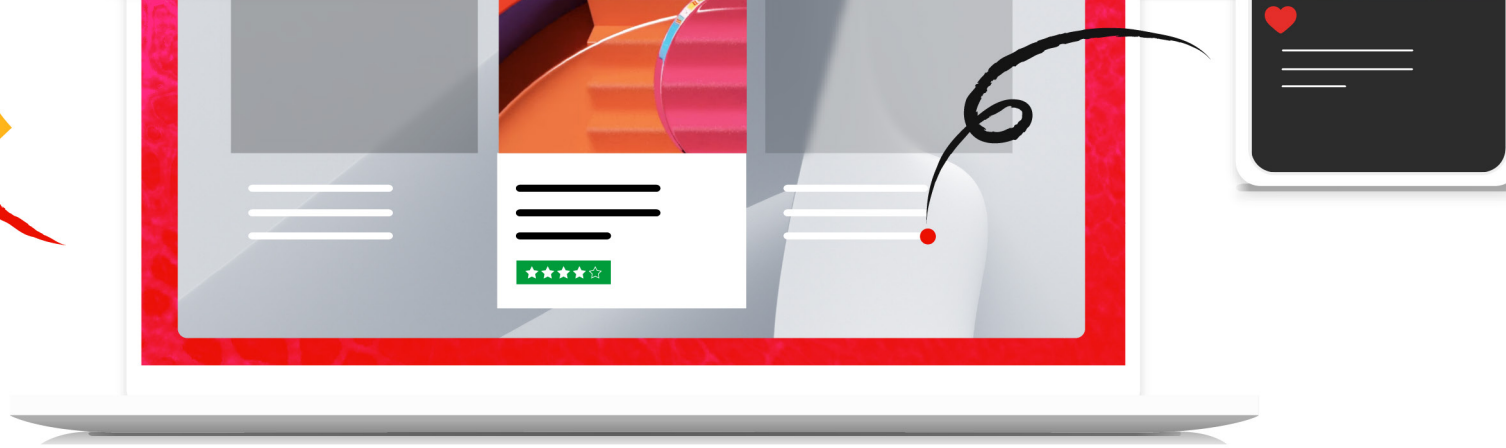
Imagine you are having a deep conversation with a new acquaintance at a cocktail party. You share specific details with each other, including where you live, what you do for a living, how many children you have, and your weekend plans. Now, if you see this person the next day, and they reintroduce themselves as if you never met before, you'd likely feel slighted.

Being able to pick up a conversation where you left off or incorporate details you already know about a person is an important part of building a relationship. A study by Magnetic and Retail TouchPoints, found the most crucial element of the digital buyer's journey is a seamless online experience. Therefore, every customer interaction should fuel and inform your next communication. This is where personalization comes in.



66% of consumers believe web personalization is acceptable as long as it's relevant and they've recently purchased from the company.

Source: Experian Marketing Services



Explore the benefits of web personalization.

Captivating the new digital customer.

You need to capture and hold your customers' attention in a meaningful way—before competitors do. With web personalization, you're empowered to deliver continual, personal experiences to individual visitors or target audiences at scale.

Engage more people.

Almost every company—from startups and small businesses to global enterprises—has thousands of visitors on their site every month. In many cases, visitors can number into the hundreds of thousands or even millions.

Visitors can arrive at your website organically, but more likely they visit because you drove them there through paid programs like pay-per-click and social advertising. This is a critical opportunity to grab their attention and convert them more efficiently. According to data from Rocket Fuel, the average bounce rate for a website is 55%. This means more than half of the individuals visiting your site leave as quickly as they arrive. Capturing even a few more percentage points of traffic with a personal message can translate into revenue growth.

Most businesses have different audience segments, and each one expects you to speak to them in a way reflecting who they are and what they want. If you have ever worked on a website build or redesign, you're familiar with the challenge of deciding how to populate the homepage with content. Generating messages which try to speak to everyone can end up serving no one, but personalization adapts your website to the needs of these segments automatically. It also helps you test which content and messaging works best for a particular segment in real-time, even if your business only caters to a single audience.

Distance yourself from competitors with the right messaging.

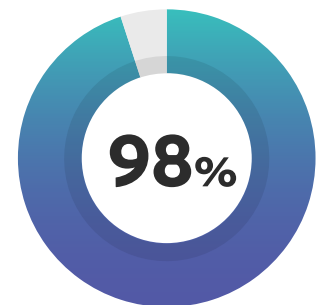
If you don't personalize your website, you risk a competitor capturing their attention and showing them exactly what they're looking for. In a study by GE Capital Retail Bank, more than 80% of consumers do their own research online before buying. This means only the most compelling messaging will catch their attention.

But your efforts shouldn't be focused on only the awareness-building stage of the customer lifecycle. You need to be vigilant to connect with customers in a personal way throughout their journey. After all, your prospects and customers will continue to come back to your website over and over throughout their relationship with you. Your messages need to evolve as your relationship grows and their needs change.

Web personalization tools can help you adapt and change their experiences over time. You can show your visitors what they want to see, in the way they want to see it, every time they visit your website.

Seven ways to reach your business goals faster.

- 1. Build brand preference.** Your website is a critical component to your cross-channel marketing efforts. You can use web personalization to strengthen how a prospect or customer feels about you online and offline, in turn building brand loyalty. Using what you know about customers based on their website interactions, you can populate other channels with branded content which resonates more effectively with them.
- 2. Understand your audience.** Web personalization helps you understand the personas, demographics, behavioral, and firmographic data which summarize your target audience. This understanding gives you an opportunity to then identify the messaging, content, offers, and products customers prefer. Knowing what types of visitors and offers lead to higher conversions, you can focus marketing resources on implementing and testing activities which generate higher revenue.
- 3. Convert visitors.** It may surprise you to know 98% of visitors to your website are anonymous, according to Monoloop. For example, if you have 300,000 visitors on your site every month, 294,400 of them are anonymous, this is a lot of missed potential. Web personalization helps you track demographic and behavioral data all while engaging and converting prospects as they visit your site.



98% of website visitors are anonymous and stay that way even when they leave.

Source: Monoloop

- 4. Nurture and engage.** Your marketers know a continued relationship with a customer beyond the awareness and acquisition stages is a critical businesses component, whether through fostering a repeat purchase, a cross-sell or an upsell, or developing long-term loyalty to the brand. With web personalization, you can achieve your goals and generate end-to-end revenue opportunities along the customer journey.

Although you are probably familiar with email nurture campaigns, web personalization lets you develop customer relationships by continuing the conversation using targeted offers, relevant content, and motivating calls to action on your website. Web personalization adds a cross-channel tool which complements the other channels you use to connect with customers and accelerates their path from cart to checkout.

- 5. Cross-sell and upsell.** Marketing doesn't end with a sale. Web personalization gives you a much better understanding of customer segments, as well as the offers, messaging, and content which motivates them. If you have individuals which have already purchased from you, you can sell them more by segmenting them as existing customers and sending offers on complementary products based on their past purchases.

6. Fine-tune your campaigns.

Web personalization lets you collect valuable information from your visitors about who they are and what communications resonate with them. You can use these insights to enrich your programs and cross-channel campaigns, making them more effective in terms of visitor engagement and overall cost. Advertisements generally send visitors to a specific landing page or your website homepage. But the engagement rate goes up if your website delivers a targeted message based on their unique attributes or, continues the messaging introduced in the advertisement. Using tools explored later in this guide, web personalization and advertising can work together to deliver targeted messages and ads across all your digital touchpoints.

- 7. Increase revenue.** Business revenue increases when you have a firm understanding of your online audience, prospects, and decision-makers. Subsequent nurture and educational campaigns based around who these individuals are—and what they do—helps present the most appropriate offers and communications. The right messaging and content can convert casual prospects into loyal customers, encouraging actions—such as a form fill or a sale—which ultimately boost your bottom line. And this doesn't stop with acquisition. For existing customers, personalization improves retention while boosting up-sell and cross-sell opportunities, encouraging revenue growth throughout the customer journey.

What's nurturing?

Nurturing is the process of building loyalty-driven relationships with potential and existing customers. When you deliver targeted, relevant messaging to your audience, it will be interpreted as helpful versus intrusive. For a more extensive look at nurturing, check out our [Definitive Guide to Lead Nurturing](#) and [Definitive Guide to Customer Nurturing](#).

The perfect match: ABM and web personalization.

Account-based marketing (ABM) is a strategic approach to lead generation which targets a key group of accounts. By employing an ABM strategy, you can target specific companies or industries with the help of your web personalization platform.

Web personalization improves ABM by identifying target accounts associated with anonymous visitors based on IP addresses of email domains. Then, you can offer a personal experience to decision-makers at the account or individual level. This strategy leads to increased engagement and conversion, making it especially valuable for brands targeting younger generations expecting personalized shopping experiences.

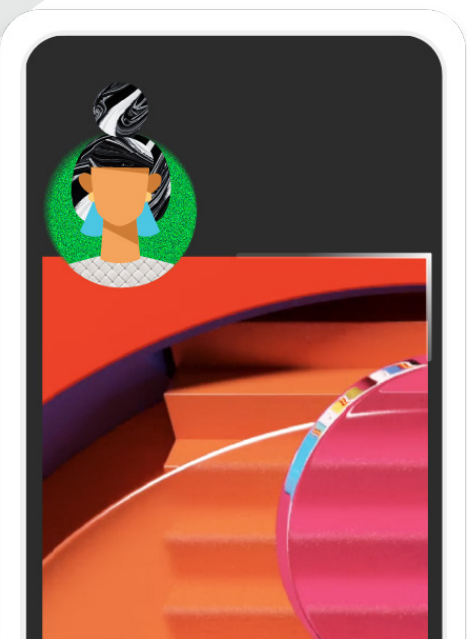
For instance, you could focus on a few of the large accounts you are pursuing. Or target based on specific types of companies—for example, insurance companies with more than 10,000 employees.

To begin your ABM program, identify the accounts you want to target. Do this by reviewing your customer relationship marketing (CRM), marketing automation history, or working with sales to identify key high-yield accounts. You can then personalize content and calls-to-action for top sales accounts.

For more information on ABM, see the *Definitive Guide to Account-Based Marketing*.

What's an IP address?

An Internet Protocol (IP) address is a numerical label or address assigned to the individual devices which comprise the whole of a computer network. It serves as a means of identification for each device, sharing its general location.





Build your marketing strategy around web personalization.

Having defined web personalization and examined its benefits, let's explore how web personalization fits into your overall marketing strategy as one of its key components.

You know your marketing goals, and you've probably defined segments that you're appealing to across channels. Web personalization is an important tool for you to incorporate into your marketing kit.

To start building a personalization strategy, it's critical to understand your overall marketing objectives. Then, you can determine how it will fit within your digital commerce plan and help achieve your goals.

Personalizing the customer journey.

Whatever your marketing goals, you're likely aligning campaigns to correspond with stages along your customer journey, so marketing activities and messages are more relevant. Effective web personalization also maps to the customer journey, but it may vary greatly between B2B and consumer companies, finance and healthcare, or quick ecommerce deals and more deliberate purchases. Despite the variety, a few core elements are vital. You need to know and understand them to determine which message and content matters to your prospect or customer at various stages. But often, materials you already have on hand contain these messages and content.

Marketing activities are typically focused around five stages:

1. Acquisition
2. Conversion
3. Engagement
4. Retention, cross-sell, and up-sell
5. Advocacy

Let's take a look at how web personalization fits into the objectives, strategies, and tactics you may use at each stage.

Acquisition

Acquiring the right customers is a struggle most marketers face as it can seem risky to spend valuable dollars and still not attract the ideal customer for your products or services. Web personalization can help you present the right message at the right time to the right customer. This boosts the likelihood they'll convert, ensuring your marketing dollars are spent efficiently. It also informs what is—or isn't—working in your marketing strategy, helping tune your messages, content, and offers over time.

Stage	Prospect or customer activity
Acquire	Subscribe to email newsletter, download your app, click on targeted ads, visit your website
Engage	Read personalized content on your website, look at other products
Convert	Write a review, share with a friend, participate in a rewards program, post on social
Retain and cross-sell	Read reviews, engage in comparison shopping
Advocate	Promote and share on social media, engage with targeted web calls to action

Enticing anonymous visitors.

Web personalization tools are particularly relevant for the acquisition phase. They enable you to captivate and convert anonymous website visitors based on their attributes. To do this, follow these two steps:

- 1. Identify visitor attributes.** Web personalization helps you identify valuable information about your visitors, including the following:

Firmographics

- Company name
- Industry
- Size, such as the market capitalization or number of employees
- Revenue

Behavior

- Search term used to arrive on your site
- Referral source
- Content consumption
- Number of visits
- Product interest and viewed pages
- Geolocation
- Location (country, state, city and even zip code)

2. Target and engage. With web personalization, you can use the information you gathered to target relevant audiences and present a custom experience to each visitor in real time—whether through content, messages, or offers. For example, if a visitor from an insurance company arrives on your site, you can show them a case study from a similar company. If a visitor from a specific location arrives at an online retailer's site, the return policy or shipping terms can change automatically. And with a strong web personalization tool, you can test and learn from the results, ultimately creating a smarter, fine-tuned experience for every visitor.

Conversion

No matter how you define a conversion—whether it's a purchase, subscription, or other action—web personalization gets your visitors there faster by offering targeted messages, content, and offers to motivate them. For the acquisition stage, you may present early awareness-building content. For conversion, you may deliver a personalized offer with a discount or a piece of content which provides social proof like a product review, to motivate visitors into making a purchase.

Engagement

Marketers encourage visitors to connect with them, whether by reading a specific article, downloading a piece of content, clicking on a targeted paid ad, or downloading your mobile app. Web personalization harnesses the attention your website receives and adapts it based on the attributes and visitor behaviors. With an engagement marketing platform, the benefits of your web personalization efforts can extend across channels, creating online and offline experiences which are personal, continuous, and relevant. Web personalization informs your visitors you know and understand them and offers them real value which engages them along their customer journey.

What's an engagement marketing platform?

Engagement marketing aims to develop long-term relationships with customers, from acquisition to advocacy. An engagement marketing platform provides you with everything they need to succeed. Here's how it engages customers:

- As individuals
- Based on what they do
- Continuously over time
- Directed toward an outcome
- Everywhere they are

Retention, cross-sell, and up-sell

After a prospect converts to a customer, the next step is to ensure they keep coming back for more. With web personalization, you can communicate directly with customers at scale beyond the initial purchase.

Marketers create programs and campaigns specifically to retain customers. Web personalization can support or augment these activities, from recognizing and acknowledging visitors as customers, giving them exclusive access to relevant content, to directing how they connect with you and your products.

It can also help continue momentum and engagement, as well as prompt cross-sales. With a web personalization solution, you can take what you know about your customer, from listening to them across channels and from past sales, turning this information into relevant offers and product or content recommendations. These may be for products they haven't bought yet or content they haven't seen, but it specifically matches either what they already have or what they're currently looking for.

Advocacy

Loyal customers are well-positioned to become vocal brand advocates, helping you to generate new business. Engaging with customers throughout their journey isn't just about individual value, but also engaging their extended networks.

Using web personalization, you can identify loyal, returning customers and engage them differently from how you would with new customers. You can target them with incentives to recommend your products or to refer your brand to their social or professional networks.

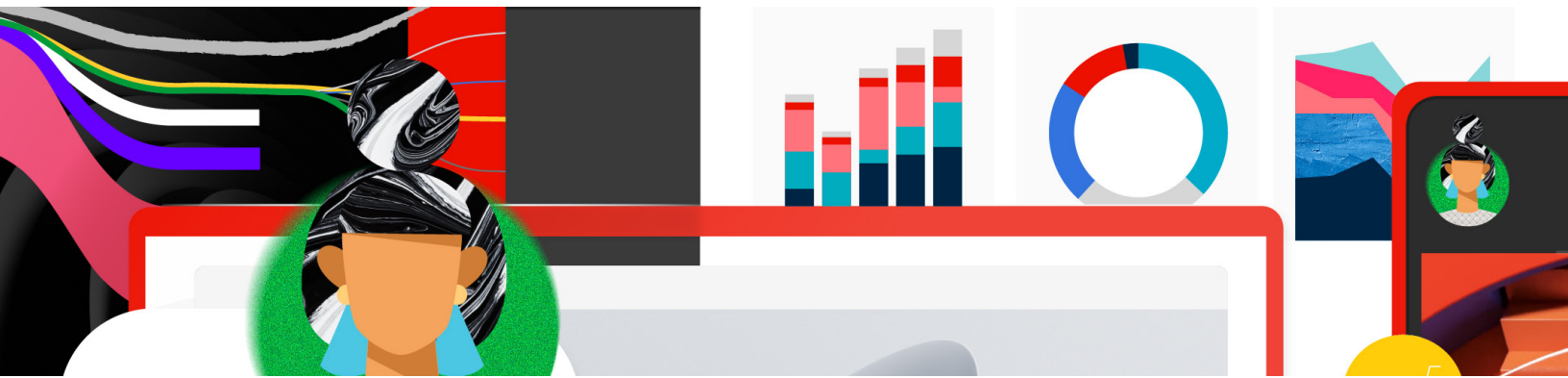
For example, if a customer returns to your website after purchasing a product within the past few months, you could offer them a discount on their next purchase for writing a review or recommending the product to a friend.

Marketing goals	How web personalization can help
Brand preference	The first impression on your website is critical. It should be relevant and appealing to visitors. Whether visitors are anonymous or established, personalized messaging, offers, or content will resonate more than generic communications. If a visitor sees a tailored offer or message, your brand will likely be more appealing and stand out.
Lead generation	Many paid, owned, and earned channels will drive traffic to your site. A call to action which is personal—like a case study in their industry—can help continue the conversation with prospects throughout their journey, converting more visitors whether they are visiting for their first time or are in a long buying cycle. Web personalization can be a powerful tool for nurture programs or account-based marketing.
Customer acquisition	A personal offer converts at higher rates. Web personalization is ideal for increasing conversions with target segments, key verticals, or distinct geographies.
Customer retention and loyalty	Web personalization helps you continue speaking to customers and stay relevant to them based on their buying preferences. You can use web personalization to cross-sell, up-sell, or inform them of new products that they might want to purchase.

Define your web personalization goals.

Now that we've covered how web personalization works—as well as how it can help you meet your marketing goals across different touchpoints in the customer journey—the next step is to define your channel-specific goals and develop a strategy to achieve them. To start, understand the business challenges you're trying to address which your overall marketing strategy will help dictate. Then, define some early metrics and outline an action plan.

In this next section, we'll go over how to select goals that make sense for your business and audience.



Use the four Ws to understand your business challenges.

To understand your business challenges and where web personalization can add value, start with the four Ws of personalization. These will help you and your team brainstorm and uncover ideas about how to use personalization to benefit your organization.

Who

You need to start with the answers to these questions: Who will you be targeting? Who will you personalize for? The “who” is your target audience, which may differ depending on who your customers are. Group your target audience into segments with similar interests or attributes.

- B2B marketers often segment on firmographics like company size, vertical, and overall revenue, or by specific roles within an organization, such as tech leaders like the CIO or IT teams. With long sales cycles, a prospect's stage in the customer journey also plays a critical role.
- Consumer marketers primarily segment on a customer's demographics, geographic location, interest in products, price sensitivity, and purchase history.

Why

Like any marketing activity, a critical element of understanding and defining your goals is to understand the “why” which is driving the activities around your web personalization.

The “why” of web personalization can be divided into two parts:

1. Why is this audience important? Perhaps it's because of easy sales, high revenue, or new markets. This reason is often defined in your overall marketing strategy.
2. Why do you want to achieve a certain goal? That may depend on whether you're driving toward more engagement, more leads, or higher conversions and why you're driving toward that goal (for example, your overall marketing objectives).

Where

Finally, identify the pages to change. Where can you personalize? Think about where on your website you can best connect with each audience segment or gain the most value. The homepage is a good place to start. For example, you might want to show a financial services case study to someone from that industry visiting your site for the first time. Alternatively, you may want to offer a live, one-to-one demo to someone who has been to your site many times and is highly engaged. For first time visitors, showcase the top-rated items from your site. For returning visitors, consider offering a discount or free shipping.

Remember, your visitors don't always visit the homepage, especially if search engines direct them to other portions of the site. A good web personalization solution lets you define campaigns that run throughout a website. Your campaign should captivate visitors wherever they end up without requiring any specific configuration or definition on the page.

What

Take the next step: What do you want to say to each audience segment? What will you personalize for them? The possibilities may seem endless but think about the messages or content intended for each audience as they visit your website for the first time. Experiment with combinations of written and visual content, offers, and calls to action. You can personalize all of these assets based on your objectives and audiences being targeted. We'll go into more detail on doing that later in this guide.

Choose the best ways to personalize.

After you understand your web personalization goals, get familiar with the different types of web personalization to determine the best ways to meet your goals.

Let's take a look at six main types of personalization you can use to earn the attention of your target audience.

1. Geolocation

One of the most straightforward ways marketers use web personalization is by location. Depending on the business type you market to, and your offer, you may target based on location in different ways. For example, if your business has a booth at a tradeshow and wants to encourage visitors from a specific city, state, or country to attend, web personalization can help by displaying a registration discount code for visitors hailing from a specific region. It's not something you would promote to everyone on your homepage, but the ability to be selective makes it feasible and effective. Alternately, if you're a global ecommerce retailer, you can use web personalization to target visitors based on their current location. You could show off summer clothing to an Australian, winter clothing to a Canadian, or display discounted shipping terms within specific countries to encourage more shoppers to buy. Regardless of the use case, creating specialized campaigns identifying users based on their location offers them an experience that feels unique, personalized, and more likely to resonate with them.

2. Behavior

Your web personalization tool can build a behavioral profile for anonymous website visitors based on the way they navigate your website, the pages they view, and actions taken. It can also use behavioral interactions such as the referral site and the search terms the visitor used to find you. With a web personalization tool with real-time capabilities, you can act on these behavioral data points as soon as they happen, and actively adapt your website for that visitor. If you already know the visitor and the contact exists in your database, behavioral targeting can factor in their behavior and all the other data you know about them. This is called personalizing based on contact data—a type of personalization we'll cover next.

Ways to target by behavior:

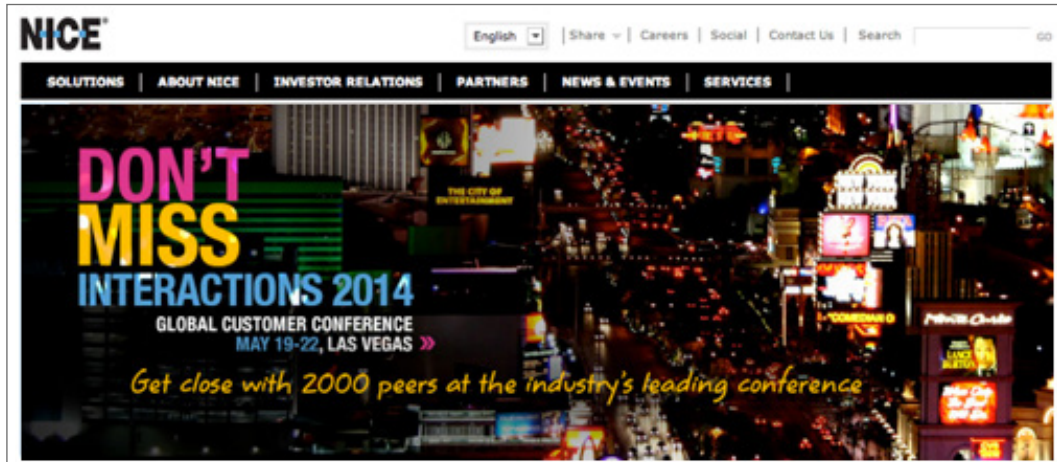
- Pages per visit
- Number of visits
- Specific pages viewed
- Search terms
- Referrals
- Customer journey

Ways to target by location:

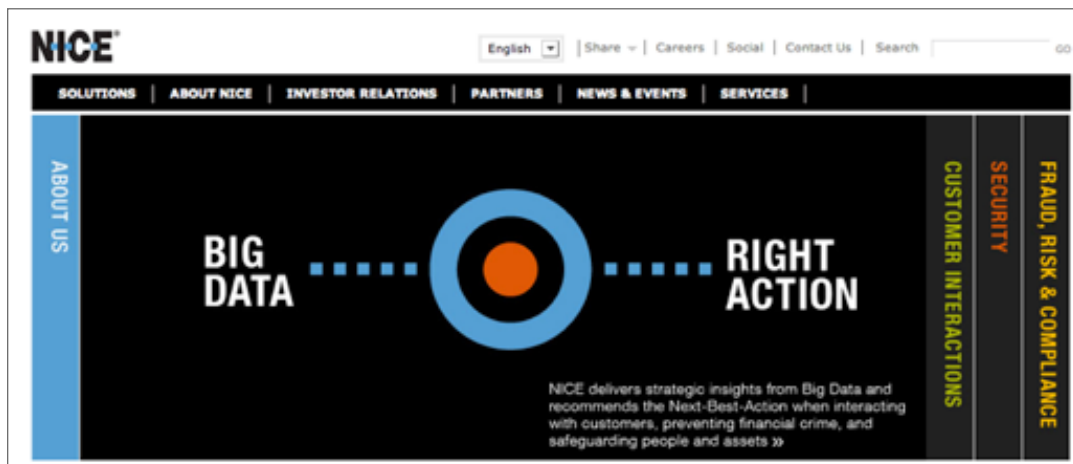
- Country, state, city
- Language
- Region zip codes
- Regulatory regions and jurisdictions

NICE Systems puts personalization to use.

In this example, you can see how NICE Systems, a provider of software solutions for telephone voice recording, data security, and surveillance, uses location-based web personalization to target website visitors coming from the United States. In the first image, you see the standard homepage, but in the second, you view a personalized page—based on the US location—with a call to action to attend their annual event in Las Vegas. NICE Systems also holds large customer events in EMEA and APAC, so visitors from those regions receive invitations for shows there.



Personalized for US Visitors.



Default view.

Consumers' feelings about personalization

Customers expect companies to use their data to send them more personal and relevant experiences, but you may wonder if this includes data on their whereabouts throughout the day.

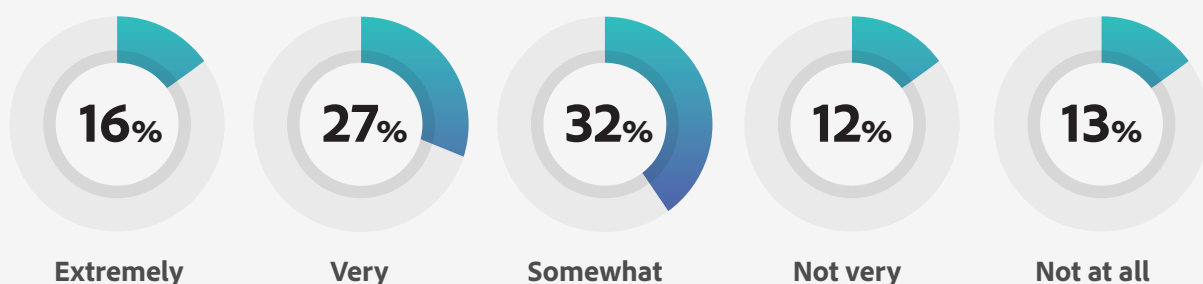
According to data from Merkle, 76% of customers are comfortable with the data being used to personalize ads. And these customers, who are visiting your website, generate lots of data about themselves and expect marketers to use it wisely.

2. Behavior (continued)

Digital behavior can tell us a lot about each visitor—how many and which pages they view, how many times they previously visited your site, the search terms they used, and the referral site or link that drove them to the site.

Let's look at an example of how marketers can use behavioral web personalization to target visitors. If a consumer visited your website previously and reviewed or purchased specific products, web personalization would enable you to suggest similar products or content the next time they land on your homepage. You could also target based on non-traditional measures of behavior, like price sensitivity, and then use web personalization to highlight more cost-effective items. Even basic behavioral signals can and should be used, such as the number of visits to your site. Again, a new visitor to your site should see one message, but someone returning for the fifth time should see something targeted to them specifically.

How comfortable people feel sharing self-tracker data to receive personalized ads.*



*Those who monitor their health via apps, smart watches, wearable fitness trackers, or websites.
Source: Rocket Fuel

3. Contact data

In many cases, a buyer visiting a web site has interacted with the brand previously. To take behavioral personalization one step further, you can use a solution that connects to your marketing automation platform. With this technology in place, you can listen and respond to your contacts and customers across multiple channels. An activity on one channel, such as an email opened or a call logged into the contact center, helps inform the personalization occurring on your website. You can use the information you already have for a specific buyer—such as previous purchases or interests, lead score and customer profile, business role or customer type—to further tailor and improve their buying experience on your website. For example, if a customer has shown previous interest in a brand-new SUV, your website will display offers and content on your SUV models, their features, and lease terms. If a customer has already purchased a specific car model, your site will show a relevant upgrade or service package.

4. Verticals

Visitors arriving at your site come from many places, and some may need more specific messaging than others. Many B2B marketers find it valuable to target visitors based on their industry vertical—like healthcare, financial services, or government. Each visitor from these verticals has specific needs and requirements that a generic message may not address. Your company might be selling different products to serve each industry or using different messaging for the same product to address the needs of the different audiences. Tailoring your website experience to a visitor's industry will make your brand more attractive and trustworthy, helping you move them faster through the sales cycle. In these examples, you can see how Marketo Engage uses web personalization to offer personalized messages and offers to members of the education and financial services verticals. We even focus some of our content creation activities around assets to support these verticals and web personalization.

Ways to target by contact data:

- Firmographic data
- Demographic data
- Buyer stage
- Campaign group
- Product interest
- Lead or engagement score
- Title and business role persona

Read about web personalization in action.

<div><p>EDUCATION CASE STUDY</p><p>ALGONQUIN COLLEGE</p><p>Learn how Algonquin College boosted admissions by 18%</p><p>READ NOW</p></div>	<div><p>EDUCATION CASE STUDY</p><p>UCI University of California, Irvine</p><p>UC Irvine increased enrollment via mobile by 3X</p><p>FIND OUT HOW</p></div>
--	---

5. Account-based marketing (ABM)

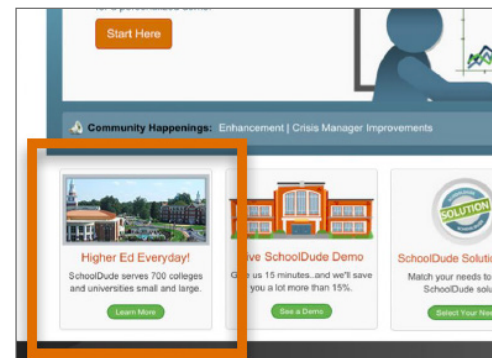
Account-based web personalization focuses on a targeted and pre-defined list of accounts and individuals. With this, you can identify a visitor's company and cross-check them against a named account list in real time. If your visitor is from an account on your set list, you can show them a targeted message, offer, asset, or call to action.

Your target accounts can be groups of existing customers, key strategic accounts, those most likely to generate revenue, or any other designation you choose. With web personalization and marketing automation, you can make this experience even more granular and focused by targeting the individuals within an account with unique and specific messages.

These examples show how SchoolDude, an education operations management suite, uses web personalization to deploy their ABM strategy.



Here is the SchoolDude website as everyone sees it.



Here is the SchoolDude website personalized for a visitor from a specific higher education ABM list.

6. Predictive

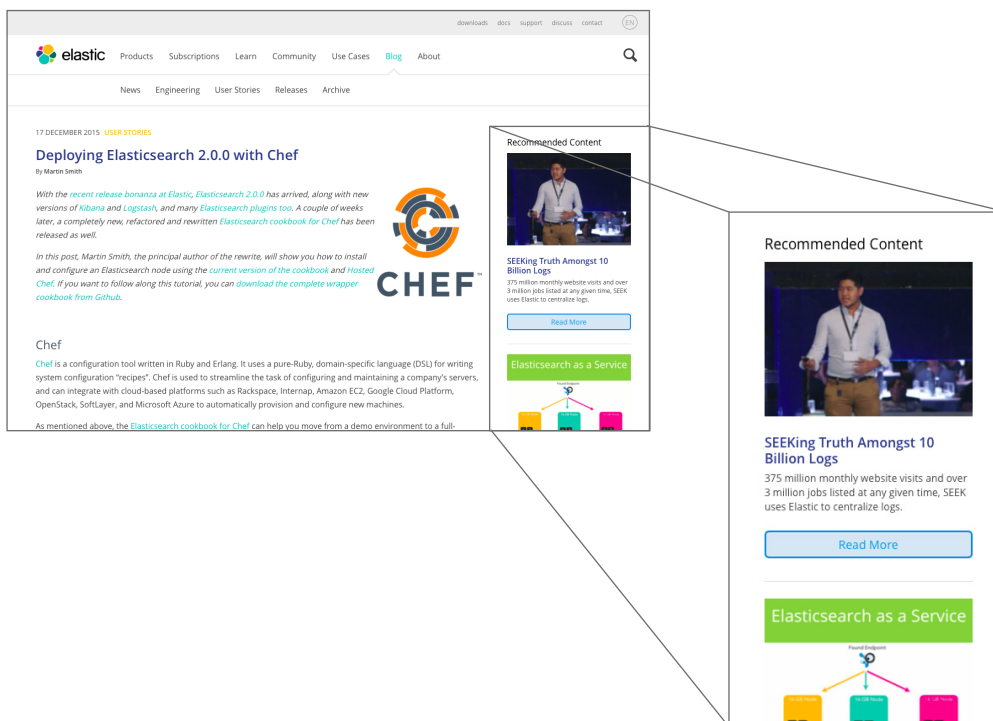
Although you can certainly target your audience with rules based on the different attributes we covered in previous sections, predictive web personalization takes a different approach that complements the slightly more traditional rule-based ones. It often uses the real-time functionality of a web personalization tool, instantaneously adapting the content, offers, and invitations on a website or webpage. Predictive web personalization is based on machine-learning algorithms that predict which content or offer is the best for a visitor and when to display it.

- **Automatic discovery** inventories all the content on your site, including videos, product offers, white papers, case studies, and blog posts.
- **Machine-learning processes** analyze correlations between types of visitors and the content they consumed to formulate content predictions.
- **Dynamic content** delivery serves content recommendations based on ongoing performance analysis.

Machine learning typically uses statistical processing models to learn and then predict the content or offers specific visitors would find most interesting. These models make their predictions based on content that previous visitors consumed or on weighted visitor attributes and how they correlate with content consumed. This enables predictive web personalization to identify which combination of attributes (for example, location, firmographic, and behavioral) will mostly likely lead to a click-through or conversion for a given content asset or offer. Unlike rule-based web personalization—as covered in the majority of this guide—machine learning and predictive analytics can dynamically cover broader ranges of correlation between visitor attributes and content assets, letting you adapt your marketing campaigns as they run.

For busy marketers, predictive web personalization gives you a “hands-free” solution for reaching your website conversion goals and getting the most value from the content and assets you’ve already produced.

In this example, you can see how Elastic, a data insights company, uses predictive content recommendations to offer the visitor a personal experience that prompts engagement based on content they’ve already viewed.



Personalization spans many industries.

Personalization is also effective in the considered purchase market, with complex buying decisions that have a greater degree of financial risk or emotional impact. This market ranges from luxury goods to travel, software, and healthcare.

Here are several ways that personalization can be used in these markets.

Identify your use cases.

Thanks to the flexibility web personalization provides, you may discover a large variety of possible use cases, and more than one may fit your business objectives. Depending on how you audience segmentation and the goals you've set, it may make sense for you to combine use cases.

Goals usually differ between B2B and consumer-focused companies, so let's take a look at some examples of web personalization use cases for each.

Making B2B personal.

Location

For many marketers, a key objective is to support and promote event-marketing initiatives. This may call for broad use of location-based event promotions. If you are hosting events in various regions throughout the country, you might want to create specialized campaigns for them. Using web personalization, you can identify visitors based on location and tell them about your local events. This typically means you can promote smaller events in a bigger way, since prospects and customers from each region will see a local event promotion on your main homepage banner. Additional location-based examples include calls to action using regional language and content relevant to local regulations. In the example, Tufin—a network security company specializing in the automation and acceleration of network infrastructure—uses a location-based web personalization campaign to encourage all visitors from Europe to attend a local European event.

Luxury goods

A consumer with a high-income profile might conduct a Google search for "gemstones" and click on a search result linking to a jeweler's website. The homepage will be personalized, based on their profile and the search term used, with a higher-grade gemstone offered.

Travel and leisure

A tourism website can up-sell or cross-sell returning visitors by featuring banners with exclusive VIP packages for existing customers.

Software

Software marketers can identify web visitors by company name and type, presenting relevant case studies and success stories from similar accounts.

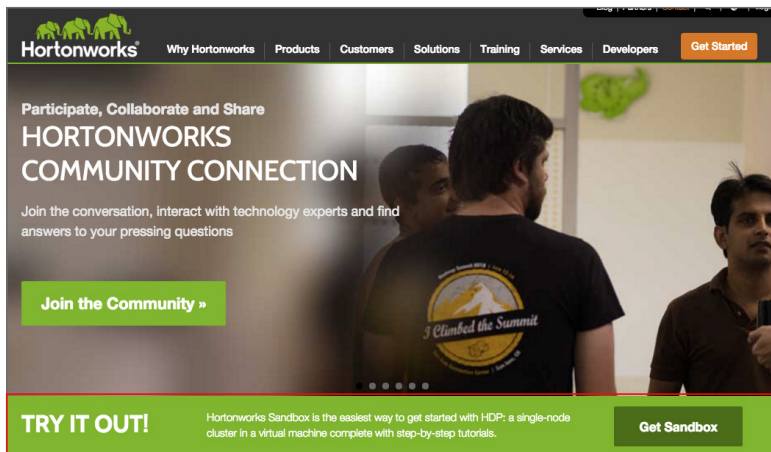
Healthcare

Healthcare providers can identify web visitors by location to limit the website information shown to services available for a specific location.

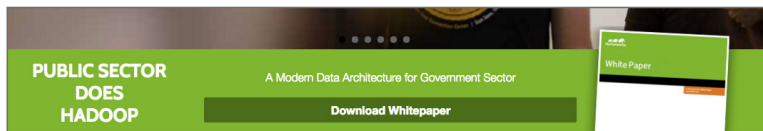
Vertical

Many B2B companies have specific products, solutions, or messaging targeted at different verticals and their unique requirements. For example, you may work at a company which is specifically targeting healthcare and higher education institutions. Campaigns designed for verticals often use industry-specific messaging and showcase unique video testimonials, use cases, and case studies.

With web personalization, you can extend the benefit of those campaigns by showcasing a tailored message, use case, or offer when a prospect or customer from a specific vertical visits your site. For example, Hortonworks—a software company that distributes and supports the open-source Apache Hadoop data platform—changes the content on its homepage based on the visitor's industry.



Hortonworks standard homepage.



Hortonworks Government homepage.



Hortonworks Healthcare homepage.



Hortonworks Finance homepage.

Account-based marketing

An organization using an ABM strategy wants to target and personalize content for specific named accounts or companies with the help of a web personalization solution. With this account-centric approach, you can be more specific than just targeting verticals or engaging sub-groups that may be unique to your business.

Advanced ABM practitioners can also identify specific individuals and decision-makers who belong to one of your targeted accounts or verticals, targeting them by IP address and later by contact data. Then, you can display the most relevant content, messages, and images to convert them, as well as alert relevant sales reps of their interest. With an advanced ABM solution, you can also target specific offices of accounts to ensure you're engaging prospects from the headquarters as opposed to regional branches. This is a critical approach for ABM, because it enables you to deliver a hyper-focused experience to an account. You can target both known and anonymous individuals within a target account in a more cost-effective, scalable manner.

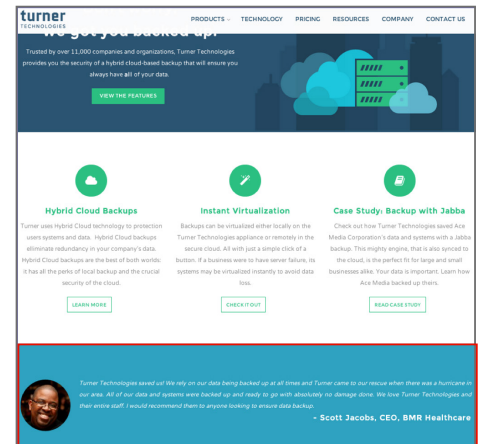
In this example, you can see that Marketo used web personalization to target named accounts that are already customers for a cross-sell opportunity. This campaign targeted specific customers and offered them information on Marketo solutions they don't already use.

Persona

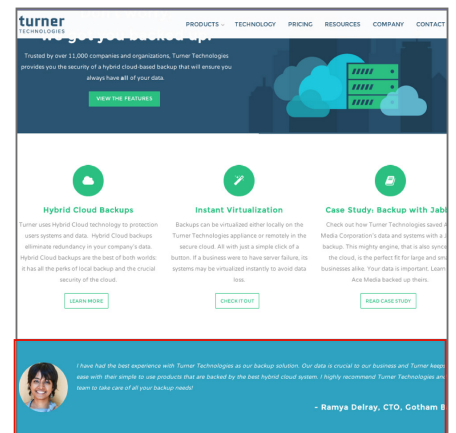
A marketer who wants to capture millennials' attention and convert them might identify a persona-based use case for their web personalization activities. Rather than focusing on companies or verticals as a whole, this approach narrows down the playing field to specific information like role, background, or even demographic data. For example, you might personalize landing pages with images that resonate with millennials or change the copy on their offers. Typical examples of persona-based use cases include targeting CFOs from Fortune 100 companies on the East Coast or IT practitioners with deep technical knowledge. In the example below from Turner technologies, you can see how they used web personalization that targeted personas for management executives and technology executives.



Marketo examples of ABM web personalization for customers.



Management executive targeting.

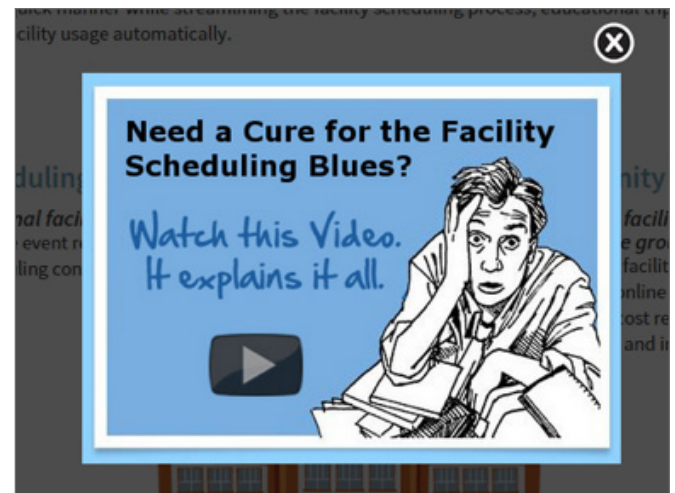


Technology executive targeting.

Behavior

The purpose of the behavior-based use case, also called behavioral targeting, is to use digital body language, which in many cases is the most relevant signal for customer intent. What someone looks for, what pages they view, or how many times they previously visited your website tells you a lot about them. Behavioral data is especially important when prospects are anonymous because you don't have a complete picture of who they are yet. Personalizing a page based on the search term that drove visitors to it makes perfect sense, because it enables you to deliver a consistent message and brand experience. Showing different messages when a prospect visits your site again is also extremely effective and more informative for the visitor.

In this example from SchoolDude, an education operations management suite, you see web personalization which taps into the visitor's behavior and the page they are visiting. Based on the page, its content, and how new a visitor is to the site, SchoolDude uses web personalization to offer a quick tutorial video to get the visitor up to speed.



Combining use cases

Although the use cases mentioned in this section are presented as standalones, the reality is more than one will apply to you and your business. Most marketers combine multiple use cases. In fact, we've found the B2B use case combinations achieving the highest conversion rates are the following:

- Industry and location
- Named accounts and persona
- Location and behavior

Personalization for consumer marketers.

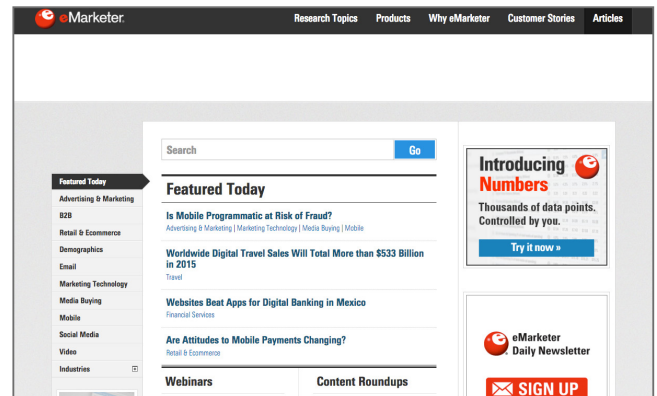
Location

In the same way the location-based use case works for B2B marketers, targeting visitors by geographical location can also prove effective for consumer marketers. This approach is ideal if a company is looking to increase profits in a particular location, or show different offerings because tastes vary by region. For instance, a fast-food brand could choose to highlight its regional specialties for users visiting from different countries.

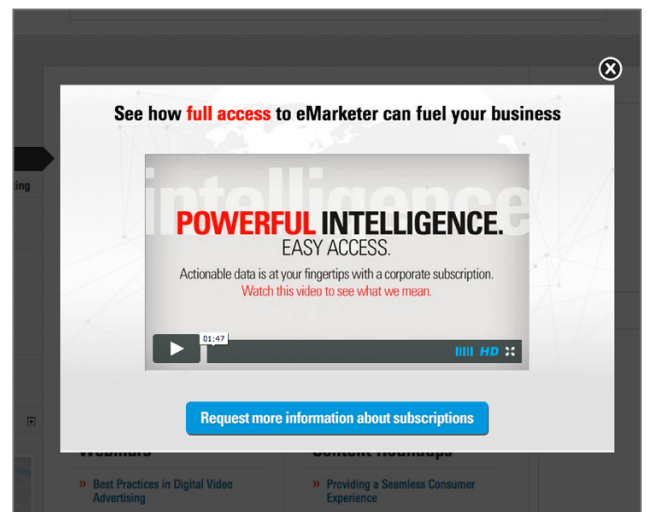
You may also personalize displayed language, shipping terms, or pricing, use weather-related special offers, or promote a physical store location. In this example, you can see James Allen—a high-end online retailer offering diamond rings and diamonds—uses web personalization to change their shipping terms and offer promotions based on the visitor's location.

Demographics

The demographic approach is optimal when you're looking to target a specific group of people. For instance, clothing stores can increase the relevance of customer experiences by showing clothing specific to the gender of the website visitor. Deeper information from third-party cookie providers can give you even more data for personalization, like marital status and previous shopping interests.



eMarketer's standard website.



eMarketer's website with a web personalized dialog box for a visitor that has visited the website more than twice.

Behavior

If a consumer has visited your website previously and viewed certain merchandise, suggest similar products or content the next time they land on your homepage. This is a good technique to use when you're looking to shorten the time from acquisition to conversion.

You can also target based on price sensitivity and highlight more cost-effective items. Using the banking industry as an example, a customer is likely to consider an investment for a while before making a decision and often visits the bank's website several times.

Using their behavior to fine-tune the site experience and provide more specific investment options may result in faster and higher conversion rates.

Buyer persona and history

In many cases, the buyer visiting your site has had previous interactions with your brand, giving you insights into their intent. You can use the data you already have about a specific buyer to further tailor and improve the buying experience with more relevant offers. For example, if your organization runs a travel site, you may use a customer persona and history use case to offer your visitor more than just a simple plane ticket. If you know someone purchased a flight to Puerto Rico, you can personalize your site to offer a visitor hotel deals or tour group packages. This is a powerful approach for driving additional purchases.

Combining use cases

Although the use cases in this section are presented as stand-alone, in many cases you will combine them. Based on our observations, the consumer use case combinations that show the highest conversion rates are the following:

- Buyer persona and location
- Buyer persona and behavior

A brainstorming worksheet for your web personalization goals.

This exercise can help you understand what you want to achieve with web personalization. For example, you may want to promote a product line for a specific region or gain new customers in a specific vertical. Identify your organization's goals and then select your web personalization efforts to achieve those goals.

Why	<p>What are your marketing organization's key objectives? For example, customer retention, top-of-funnel acquisition, accelerated nurturing, or focusing on targeted accounts.</p> <ol style="list-style-type: none">1.2.3.
Who	<p>Who is your audience? For example, list their specific locations, industries, and behaviors, and whether they are anonymous visitors or existing customers.</p> <ol style="list-style-type: none">1.2.3. <p>Note how you currently segment audiences and target them across other marketing channels.</p> <ol style="list-style-type: none">1.2.3.
What	<p>What will you personalize? For example, list the assets you will use and the existing content you have that fits the audience.</p>
Suggestions	<p>Calls to action:</p> <ol style="list-style-type: none">1.2.3. <p>Content offers (eBooks, case studies, reviews):</p> <ol style="list-style-type: none">1.2.3.
Where	<p>Where can you personalize? For example, you may personalize on your website, via retargeting advertisements, or in other untapped areas.</p> <ol style="list-style-type: none">1.2.3.

Establish metrics for success.

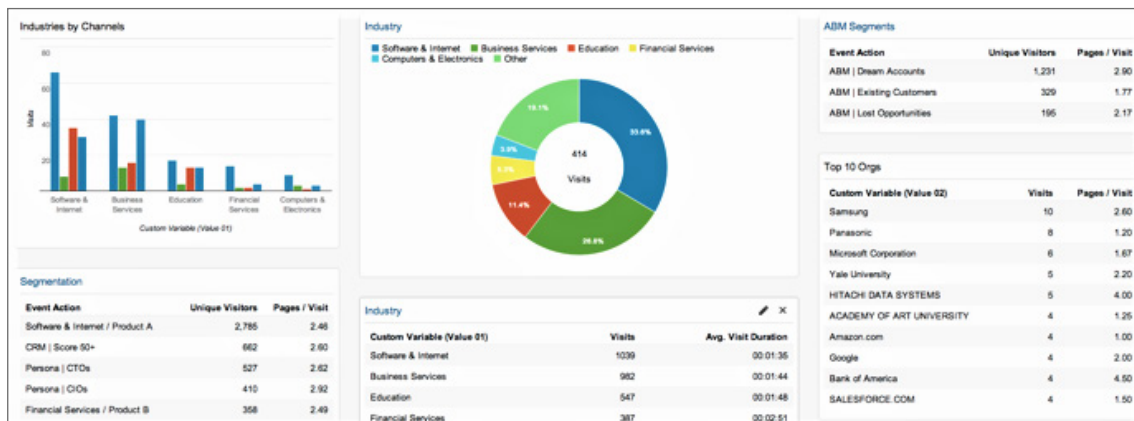
After you establish your goals and use cases, it's important to think about what success will look like for your organization. Then, select metrics you can use to create a benchmark before implementing your web personalization campaigns.

Identify analytics that inform.

By setting up analytics beforehand, you can establish a benchmark that defines the engagement and conversion status for target segments. This will also help validate your audience choices by showing how many prospects and customers exist in each segment.

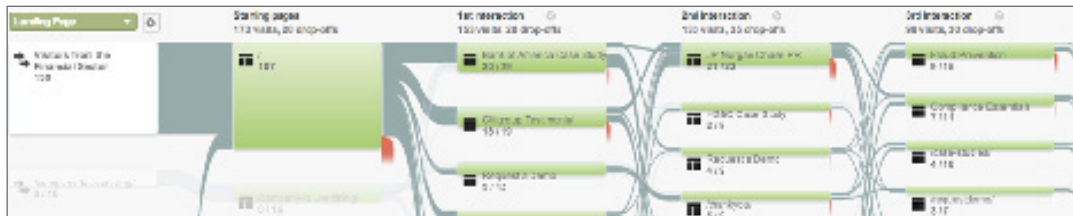
It's important to set your measurements up quickly, even before creating any campaigns, so you can establish baseline metrics and begin testing, refining, and improving. Some advanced web personalization tools not only deliver their own metrics but integrate with Google Analytics as well. This gives you visibility into how specific segments defined by industry, company size, buyer stage, or behavior, interact with your website. Combining web analytics and web personalization as part of a marketing automation platform delivers full lifecycle tracking. This example shows Marketo Engage analytics in action.

In the example, you can see how web personalization gives marketers a holistic view of the customer lifecycle. The example shows a Google Analytics dashboard integrated with data from Adobe Marketo Engage. Adding segment match data to Google Analytics lets you see how your segments are performing.



View of data from Google Analytics appended by Adobe Marketo Engage web personalization.

You are also able to see how visitors from specific audiences enter your website and move through it. For example, by combining data from Google Analytics and Marketo Engage, you can see this interaction flow for specific audiences. This can be incredibly beneficial as you shape and refine your web personalization campaigns, because you can identify trouble spots, like where people bounce from your site, and adapt your content and offers to see if they make an impact.

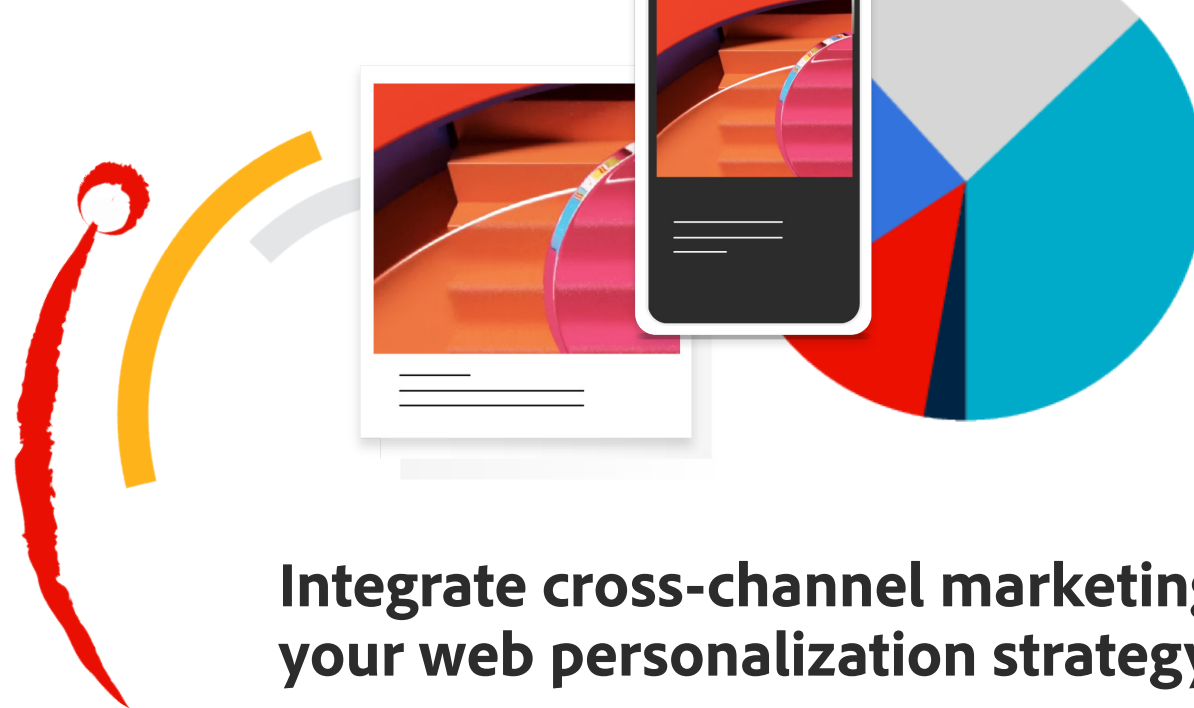


An interaction flow for a specific audience in Google Analytics.

Set your segments.

Once you set up analytics, take note of how the groups you selected perform now. This information helps you further segment your audience for more effective nurturing. Relevant messaging and content guide these prospects toward an eventual purchase. Here is some of the information you might need:

- **Number of visitors.** Determine how many visitors from each segment, audience, and vertical visit your site now. Be sure to benchmark before and after you begin web personalization to fully understand how other marketing efforts push traffic to your site and identify potential areas for improvement. The number of visitors from a given segment is a strong indicator of brand awareness. If you have few visitors from a target segment, it may mean not many of them know about you. You can't expect much revenue from them unless you target them more effectively through other channels. On the other hand, if you see a high volume or group of visitors outside your target audience, you may want to consider targeting them specifically.
- **Demographics and behavior.** Identify the types of people who visit your site and the specific content they consume once they arrive. Decide whether you're directing them to the right content.
- **Engagement.** Investigate whether people from your target segment are browsing several pages per visit or bouncing immediately. Find out if they view relevant content or not, and how many return to visit your site.



Integrate cross-channel marketing into your web personalization strategy.

Your customers' expectations of a personal experience isn't just limited to your website. Your web personalization efforts need to reflect their activities across every channel and at every stage of their relationship with you.

Personalize across channels.

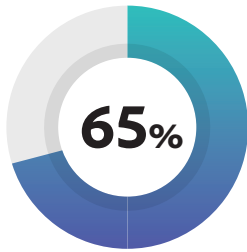
Web personalization can complement activities across every marketing channel you use, although different channels work best for different stages of the customer lifecycle.

Coordinating messages across channels increases the performance of those channels and improves the customers' experience, according to data from MyBuys. This makes sense when you consider prospects don't usually visit just one channel before purchasing. In fact, they are often self-educating long before you ever know about them.

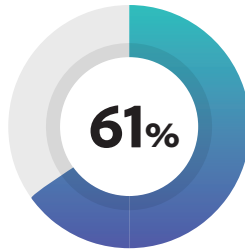
Research from Google shows a majority of consumers take a multi-device path to purchase and therefore connect with your brand on more than one platform or channel.

Unfortunately, despite customers taking this multi-device path, data from Experian indicates only a small fraction of brands are executing cross-channel communications using a single view of the customer.

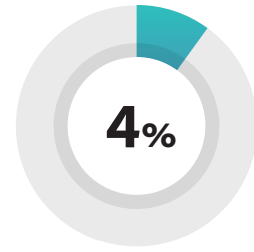
Customers take a multi-device path to purchase



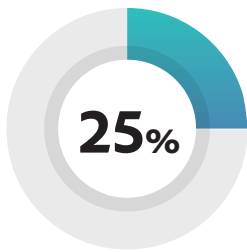
Start on a smartphone



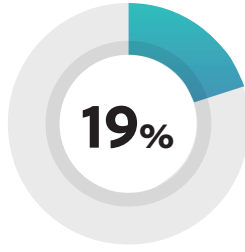
Continue on
a PC/laptop



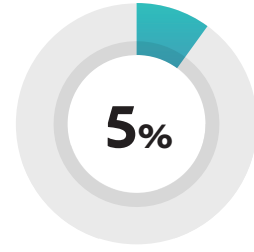
Continue on a tablet



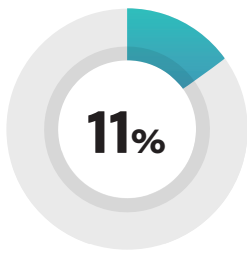
Start on a PC/laptop



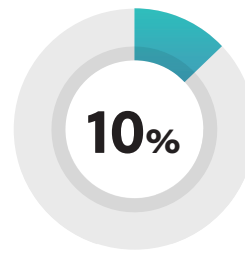
Continue on
a smartphone



Continue on a tablet



Start on a tablet



Continue on
a PC/laptop

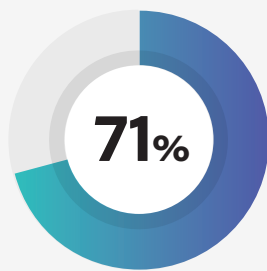
Source: Google

Cross-channel web personalization with marketing automation.

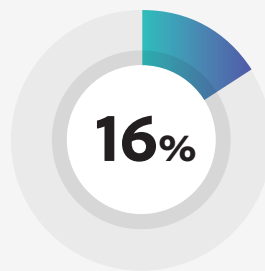
Most of your marketing campaigns—from ads to social media to email to events—motivate prospects to visit your website. Combined with the knowledge that buyers move freely from channel to channel, this makes your website a critical hub for interaction. Web personalization lets you listen and respond to prospects and customers on your website, but you often need more tools to do the same across channels. With that capability, you can create a consistent, personalized customer experience.

To obtain a single view of your customers and your marketing activities geared toward them, you need to use a marketing automation platform that includes a web personalization app. Marketing automation enables you to make the cross-channel commerce a seamless experience for your customers.

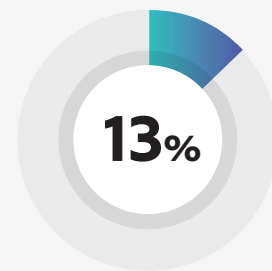
What online shoppers believe makes brands successful.



**Both a strong online
and in-store presence**



**A strong online
presence only**



**A strong in-store
presence only**

Source: Avionos

Cross-channel web personalization with marketing automation.

Your marketing automation platform can make it much easier to implement a cross-channel marketing strategy—especially when you want to consistently communicate to individuals on a personal level at scale.

Combining marketing automation with web personalization helps you do the following for prospects and customers:

- **Listen:** Pay close attention to behavior across all channels, such as ads, email, social, mobile, and web, to create a single, integrated view of the individual.
- **Learn:** Process all of an individual's digital behavior for a better understanding of them.
- **Speak:** Manage, personalize, and act on conversations across all channels.
- **Measure:** Understand which activities are working and which are not, from early engagement all the way to purchase.

If you are using a marketing automation platform, you can build customer profiles based on demographic and behavioral data gathered across many channels. With built-in tools for web personalization, you can use this data to create highly targeted campaigns. And because your web personalization campaigns are informed by the same segmentation you use to power campaigns across channels—email, mobile, digital ads, and more—it becomes a cohesive part of your overall marketing strategy. By incorporating web personalization in the rest of your marketing campaigns, you'll make your buyer's experience much more interesting and effective.

Your website is your main interaction channel. Almost every marketing program you have sends your prospects and customers to your site, whether you encourage them to click an ad or email link or review your site after visiting your booth at a trade show.

Ways your website is your main interaction channel.

- Events
- Paid media
- Email programs
- Website
- Social

As individuals browse your website and interact with your personalization campaigns, the data collected helps create a global profile of your customer base. This fuels your communication with them across channels—and vice versa. Actions and expressed interests from other channels let you further personalize the website experience. We'll look at some examples in the following sections.

Personalize for mobile.

With the rise of smartphones and tablets, the number of mobile devices in the hands of consumers has grown dramatically. In fact, according to data from Gartner, tablets alone outnumber personal computers, with all PC sales representing only 12% of worldwide device shipments in 2015.

Marketers have been forced to adapt to the proliferation of smart devices among the consumer population. Today, mobile marketing is much more than a trend, it's an increasingly important part of the e-commerce landscape and how people access websites.

It's essential your web personalization strategy is deeply connected to your mobile marketing activities. Web personalization can help you target users with meaningful, mobile-friendly offers, content, and calls to action. In fact, some web personalization tools, let you identify your incoming visitors based on their browser or device—such as iOS Safari—and adapt your offers accordingly during mobile web browsing. Advanced tools also include a specific module for in-app mobile messaging and push notifications. For example, by using web personalization and mobile marketing together with marketing automation, you can offer a discount via in-app messages or push notifications based on the product the visitor viewed while on your website, ultimately helping convert visitors faster.

Getting personal with digital advertising.

Digital advertising has traditionally been a key channel for acquiring customers online. But now it's capable of reaching customers at just the right time via website retargeting. Retargeting places display ads across an ad network for website visitors who leave without taking the desired action. It's no longer about serving ads to prospects and customers at the right time—it's about retargeting them with an ad specific to their needs or interests. According to a study from Econsultancy, 88% of marketers say using social graph data to personalize the online experience has a high impact on both ROI and engagement. But only 6% actually do it. You can use the visitor insights gathered instantly via web personalization to personalize retargeting ads when the visitor leaves your site. This makes digital advertising a perfect partner for web personalization.

320,964

Tablets shipped in 2015

1,946,456

Mobile phone shipped in 2015

49%

of those surveyed own
two mobile devices

PC sales fell to

12%

of worldwide device
shipments in 2015

316,689

PC market total in 2015

Source: Gartner

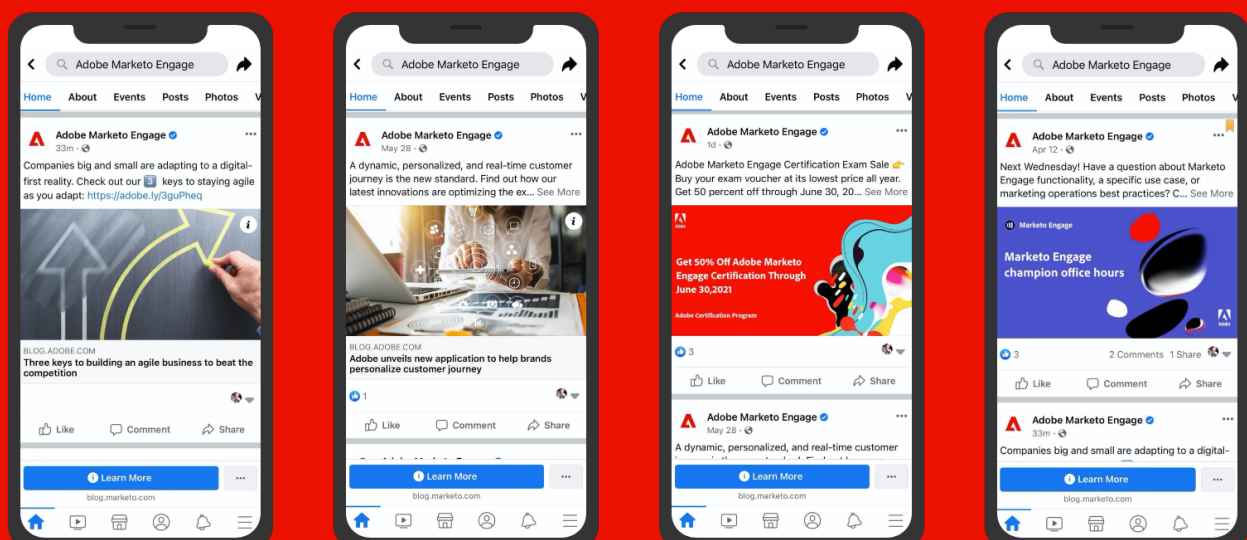
For example, a web personalization system may recognize an anonymous visitor is from the healthcare industry and displays a healthcare-focused case study for this visitor. Although an ad retargeting platform with this information would recognize this person belongs in your healthcare segment and could serve a retargeting ad offering a best practices whitepaper for healthcare professionals, for example. By using this data in your ad retargeting platform, you can compel individuals to revisit to your site to show them new content specific to their interests. Using both web personalization and retargeting boosts website conversions and delivers the kind of personal experience consumers and professionals have come to expect.

If your web personalization system is part of an overall marketing automation solution, you can use a site visitor's lead or engagement score or buying stage to further personalize web experiences and retargeting ads.

A highly interested business professional might receive a demo offer through a retargeting ad. Or a consumer who has connected with your brand through a number of channels but hasn't made a purchase might get a discount or free shipping.

Targeting your ads to the right prospects—those who have already expressed interest in your brand—is a great way to improve ad ROI. Personalizing those ads further increases your results.

In the example below, you can see advertisements on social media targeted to segments that reflect those used in web personalization. These examples show how web personalization and retargeting can work together.



Personalizing email marketing.

Email marketing is still one of the most effective ways for marketing to known prospects and customers. According to Capterra, 91% of US consumers use email every day. Additionally, email has been proven to prompt purchases three times more often than social media—and the average order value is about 17% higher, according to McKinsey. Imagine the power of email combined with other channels to create a consistent story and experience.

Web personalization and email marketing combined enable you to create custom experiences, respond in real time to customer behavior, and offer each individual deals and information about products and services they're looking for at that moment. Nurturing across the entire customer lifecycle improves when you alternate serving a personalized website experience with sending emails that draw on the same data, and both can pick up where the other left off.

Apply personalization to offline marketing.

Although many marketing activities are digital, many offline channels can integrate well with, and benefit from, web personalization. For example, if your company has a brick-and-mortar store, retaining a database of your customer's activities in and out of the store—such as social media contest submissions, recent purchases, and online reviews—can help you tailor interactions with them. Maybe you want a visitor to sign up for your loyalty program. Invite them to sign up during their in-store visit. Once they are part of the program, send them a welcome email directing them to your website for a unique or exclusive experience to encourage the next action.

In another example, if your company is exhibiting at an industry tradeshow, every scan you get there can serve as a way to target visitors to your booth. You can use this to score them as being interested in your company and then follow up on the conversation after the show. Or you can use this information to offer location-based offers in the show's vicinity. Even prospects who didn't scan, but checked out your website after seeing your booth, can have a personalized experience related to the event or receive an offer to revisit the booth for a personal meeting.

Another offline channel web personalization can enhance is print advertising. If you send direct mail campaigns, using personalized URLs (PURLs) can help move customers to your website, and also let you specify the type of content they see. This can be a great way to gather information about your leads. For example, if you're missing a prospect's email address, you can send them a direct mail piece with a PURL to download a coupon. When they visit your website, they'll be directed to a custom landing page to fill out their email address and get the coupon. Once you have their email, you can start including them in your email nurture campaigns.

Create your cross-channel personalization experience.

Use this worksheet to help determine how to incorporate web personalization into your activities for each of the marketing channels listed. The web personalization type should support both your goal and your messages, and coordinate tightly with the messages on supporting channels. It's okay not to use all of the channels or to have more than one row for some channels. We filled in the first section for you as an example.

Marketing channel	Goal	Personalization type	Message, offer, or CTA	Supporting channels	Budget
Event	Drive attendees to booth	Location-based	Visit our booth to meet a consultant and for a chance to win an iPad	Social media Paid advertising	\$1,000
Print					
In-store					
Blog					
Email					
Website					
Mobile					
Review sites					
Social media					
Paid advertising					
Paid search					
Retargeting					



Use content to deliver a personal web experience.

Create a content plan.

A successful web personalization campaign requires content. To create a full, personal experience, map out your existing content, offers, and calls to action for each segment, at each stage of the customer journey. For instance, a call to action to download an eBook should be personalized based on the site visitor, and the eBook itself should fit the customer's interests and lifecycle stage.

Content discovery

Once you know who you're targeting, it's time to decide what content format you'd like to present to them. Whether you're a B2B marketer providing case studies, videos, and eBooks or a consumer marketer sending special offers, videos, and ads, you probably already have content that appeals to many different audience segments. Personalization ensures your content gets seen and engaged by the right people and provides value to them. To do that, you need to consider the type of content you offer and when customers should see it, in addition to what it looks like and where you can show it on your website.

Although it may sound daunting to create the amount of custom content needed to implement web personalization, most of the content you need for personalization already exists, and you can implement several strategies to help you do more with less. To stretch your existing content even further, you can rework sections to make them more relevant to specific industries or demographics.

Think about all of the eBooks, customer reviews, case studies, product videos, special offers, and testimonials you already have. Then consider whether you can use these for different segments or change a few details or examples to make them relevant. Employing a content recommendation engine (CRE), which we'll define in greater detail later in this section, helps you consistently deliver relevant experiences to your visitors. A CRE helps you identify the content you already have and discover the opportunities to use and tailor it more effectively.

Content type

Many people wonder what type of content they should use and when such as video versus white papers, eBooks versus case studies, or special offers versus customer testimonials. Although there is no one answer—other than always testing—the following sections gives you suggestions on best practices and guidelines for the type of content appropriate for different stages of the customer journey.

1. Early-stage

Early-stage content addresses prospects who are becoming aware of your product or service. The content should be easily accessible. The goal is to build awareness and thought leadership, or address a pain point. This type of content doesn't really talk about products or services. Often, it is digestible and lightweight—such as videos, infographics, or happy customer testimonials.

2. Mid-stage

Mid-Stage content most often addresses prospects during the consideration stage as they are evaluating a purchase. At this stage, your buyer has an addressable need, so your content can more specifically discuss your product or service. Because you are trying to learn more about your buyer, converting anonymous visitors to known, you will usually gate content at this stage. In many cases, your mid-stage assets or offers may be your most valuable assets—whether that's a third-party analyst report or strong special offer.

3. Late-stage

The content at the late stage should remove any barriers to conversion. Your content must answer why the buyer should purchase from you. Content should make a big impact—offering a checklist for considering purchases, customer reviews, or your best offer, whether that's a percentage discount or free shipping.

After mapping out your campaign matrix, which is the next step, you may discover that you have some content gaps that you need to fill.

Content and the customer journey.

To effectively map out your content, consider which content you will deliver to each of your segments at each stage of the customer journey. It's critical your content is not only tailored to who your visitors are, but also where they are in the marketing process. Web personalization software lets you adjust your calls to action based on the person visiting your website.

Select your chosen groups—whether you're targeting separate regions, demographics, or verticals—and the relevant content for each stage.

Content discovery

Some web personalization tools offer a content discovery module, which automatically inventories content on your website. This helps you learn about all the content you have available, along with current consumption patterns and lead-generation performance, making it easier for you to choose which content to display and to whom, without the manual work of listing and evaluating it.

- Books
- Video
- Case studies
- Articles

B2B campaign program matrix.

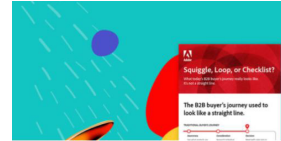
For B2B, the program matrix will include sections for awareness, interest, evaluation, and commitment. This maps closely to the stages of the customer lifecycle we discussed earlier in this guide, but keep in mind each marketer may use different stages.

You might start with an infographic or short video for awareness, move on to a testimonial or case study for interest, and finish with a demo or third-party analyst report as you near conversion.

In the campaign program matrix, you can see the content is not only tailored to the segment and its interests, but also to the stage. If you have more than one asset that could fit a certain segment and stage, don't overthink it—test it. Use segmented A/B testing to learn which asset actually works best for each segment and stage.

You can use this matrix for other scenarios other than segment and stage, such as segment and location, or customer type and location.

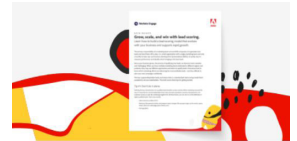
Awareness



Understanding the evolving B2B buyer's journey

Anonymous

Education



Grow, Scale, and Win With Lead Scoring

Known Lead Score <20

Validation



[What in the world is coming next?](#)

20< Lead Score <50

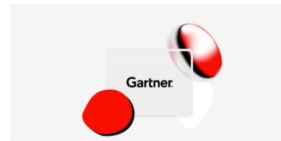
Solutions



Pipeline marketing –maximize engagement and increase impact on growth

50< Lead Score <100

How To Buy



[Market to Engage, ranked highest for ability to execute](#)

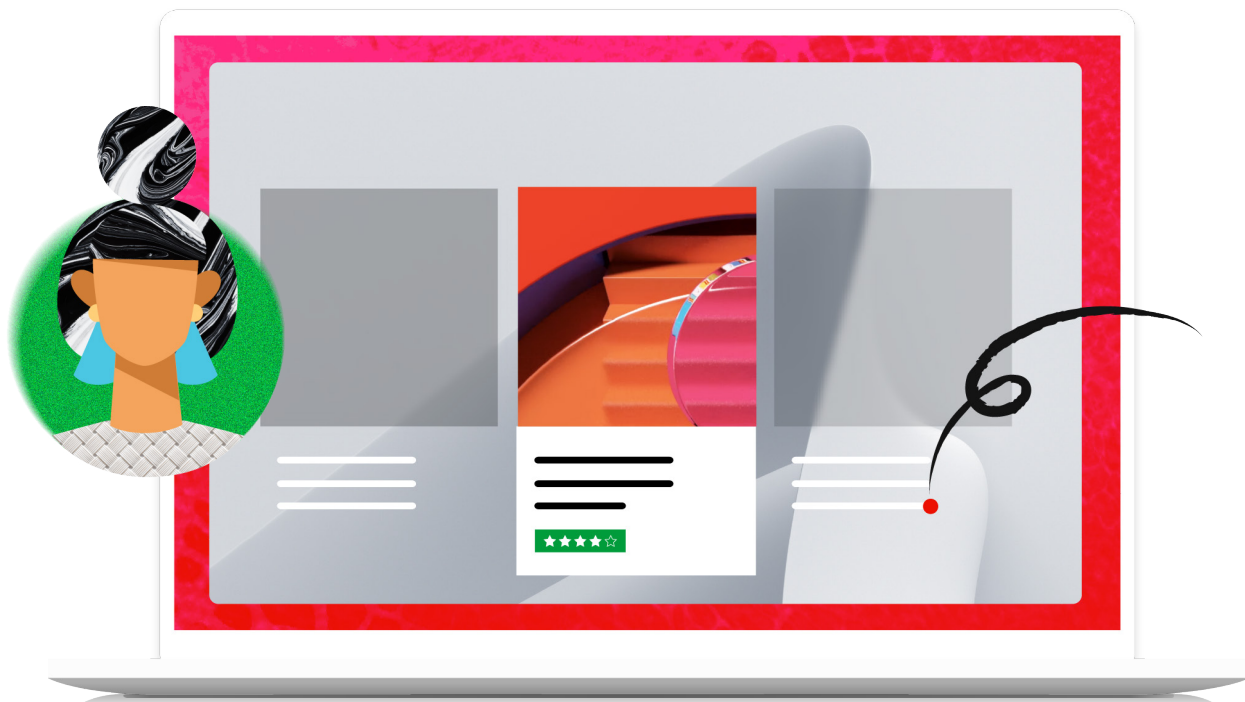
Lead Score >100

Campaign Program Matrix Example: Vertical Customer Journey: Company X				
Segment asset type	Awareness	Interest	Evaluation	Commitment
Fortune 500 Companies	State of the Modern Meeting Infographic	Facebook Case Study	How Company X Helps You Live Demo	Company X Advanced Solutions User Group
Educational industry	Learning with Company X Use Case	Wharton University Testimonial	Cloud-based Video Conferencing Whitepaper	Company X User Summit Event/Conference
Named account lists	Company X Demo Center Overview Video	Wharton Connects Students Videocast	Company X Mandate and Promise Advanced Services	Join Our Top Executives Networking Meeting

Consumer campaign program matrix.

For consumers, you typically include three sections in the campaign program matrix—awareness, consideration, and decision—depending on the length of your sales cycle and type of product or service. Identify content assets for each phase. To promote brand awareness, you could start with a product highlight featuring your most popular item and then move on to a customer testimonial once a customer has developed interest in your product. Finally, you may want to close the deal with a special offer.

Campaign Program Matrix Example: Consumer Product			
Target segments	Awareness	Consideration	Decision
Product interest A	Product highlights infographic	Product A versus the others	Last-minute special offers
		Video comparison	Localized delivery and shipping details
			Shipping policy
Product interest B	Product introduction	Happy customer testimonial	How Product B won international awards
	Introduction video		Press release



Choose and create smart content.

Content is the fuel that sparks personalization success. Instead of creating new custom content from scratch, make the most of existing assets by recreating particular sections, changing visuals, or modifying calls to action. The trick is to repurpose what you have and tweak it to fit the needs of each segment.

Repurpose content.

To reap the full potential of your personalized campaigns, you may have to create new content. But begin by repurposing assets you already have. See which of the following elements you can change to target an asset for your specific segments:

- **Titles:** Revise titles to resonate better with your target readers.
- **Calls to action:** Edit the call to action to reflect the targeted segment.
- **Statistics and copy:** Look for industry-specific studies or other data unique to each segment.
- **Divvy up content:** Reduce the content you have into smaller assets, like cheat sheets, short eBooks, or even blog posts. In the example, you can see how a larger report, *The Rise of The Marketer*, was broken into different assets based on segment.
- **Visuals:** Swap out the cover page and some of the interior artwork to make it feel more relevant to your audience.

Test and improve your content.

Web personalization helps you understand what content works and what doesn't. Whether you're using a content recommendation engine or not, web personalization is a great way to determine if your content, message, and offer resonates with your target audience.

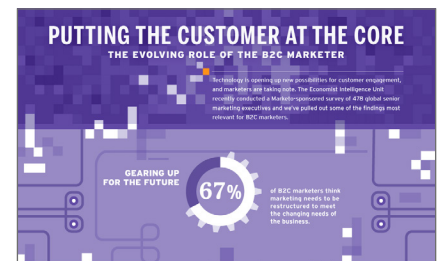
Later in this guide, we'll discuss in-depth how to test and improve your campaigns. For now, note that it's important to make testing part of your web personalization practice—not only to increase effectiveness but also to fine-tune your messaging and content creation efforts and identify gaps.

PDF



Original Report

Infographics



Breakout Assets for Segments—two infographics

Place your content.

A good web personalization tool lets you choose what content to display, and it also gives you various ways to do so. For instance, you can swap an existing part of your page with a relevant case study or use an overlay to provide a more immediate call to action promoting a local event.

Web personalization helps you understand what content works and doesn't work.

Recommend the right content for every visitor.

A predictive content recommendation engine (CRE) defined.

CREs help marketers deliver a successful web personalization experience in four ways:

1. Auto-discover and map all of your content assets.
2. Learn which content works best for whom.
3. Recommend relevant content to web visitors—known and unknown.
4. Increase content consumption and onsite engagement and conversions.

CREs combine the speed of real-time targeting and personalization with the insights of machine learning and predictive analytics.

According to Gartner, 63% of digital marketing leaders still struggle with personalization—and only 17% use AI and machine learning. This leaves a huge amount of room for growth

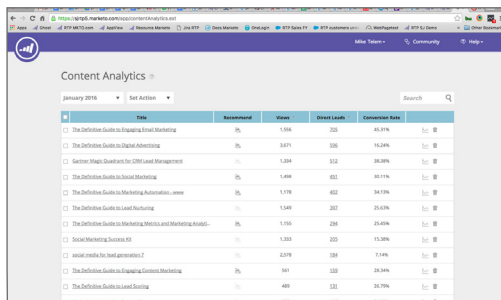
What a predictive CRE can do.

1. Auto-discover and map all of your content assets.
2. Learn which content works best and for who.
3. Recommend relevant content to web visitors—known and unknown.
4. Increase content consumption and onsite engagement and conversions.

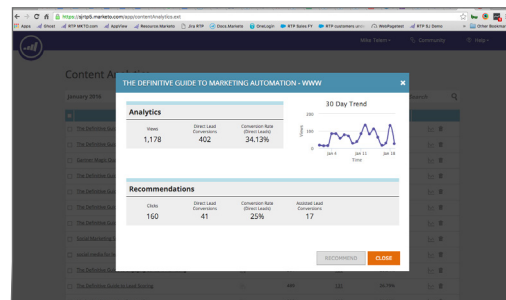
and for organizations to take advantage of the benefits of this incredibly personalized way to communicate with your visitors.

Predictive content identifies patterns in visitor profiles and behaviors, and automatically discover and recommends the most appropriate content for each interaction. This shows you all the inventory you have, including the engagement performance for each content piece. Then, it uses machine learning to recommend the right content, to the right visitor, at the right time.

In short, the platform discovers and maps your content assets, learns which content works best for specific visitors, and uses this information to recommend the most relevant content to your visitors. This tool supports your web personalization campaigns by providing valuable content in real time to move prospects and customers further along



Analytics for a single asset within the Predictive Content dashboard in Adobe Marketo Engage.



A deeper look at the Predictive Content dashboard for a single asset.

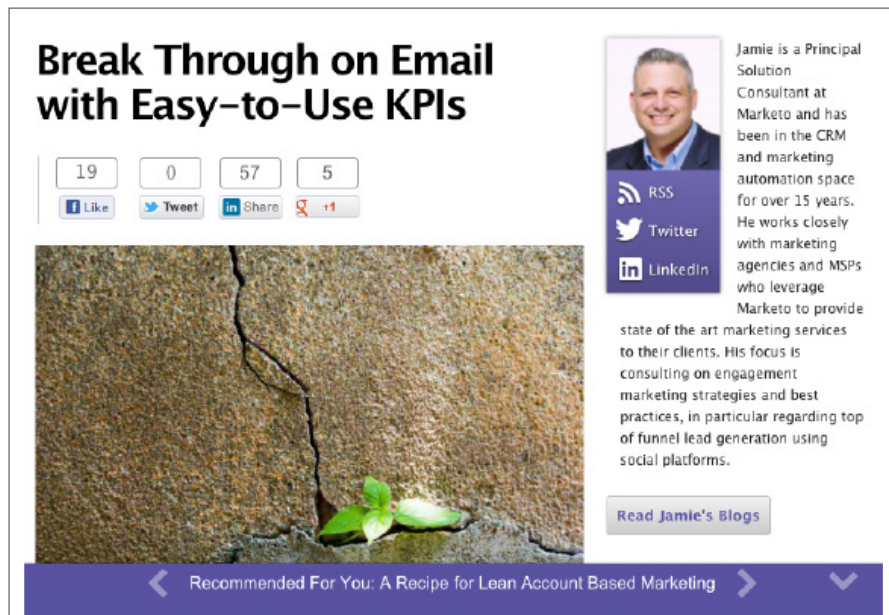
their journey. You can still run your rule-based, targeted campaigns as usual, but the CRE will also be running in the background to supplement your campaigns with content that increases consumption.

A CMO at a financial services company might be underwhelmed by a general marketing whitepaper, but they might appreciate being offered a marketing whitepaper focused specifically on their industry and addresses relevant pain points. The CRE system also takes previous behavior into account to deliver new results with each new visit, slowly drawing the individual toward conversion. So in this example, after the CMO downloads a whitepaper, they may be presented with a new content asset, such as a different targeted whitepaper or webinar.

Content suggestions let you dramatically increase the value of web personalization with little effort. You can see how Marketo Engage uses content suggestions from its CRE to provide a suggestion to a blog reader.

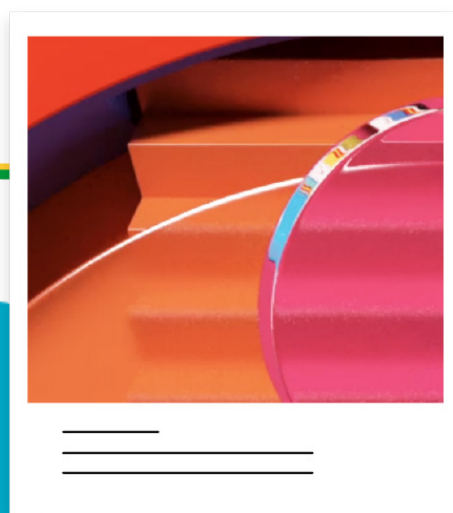
Content analytics

Understanding the value each content asset provides to a specific audience is another benefit of a CRE, which highlights your top performing assets automatically by serving them more often. This can be helpful when it comes time to request new content assets or choose what to refresh.



Recommended For You: A Recipe for Lean Account Based Marketing

Content analytics within the CRE in Adobe Marketo Engage.



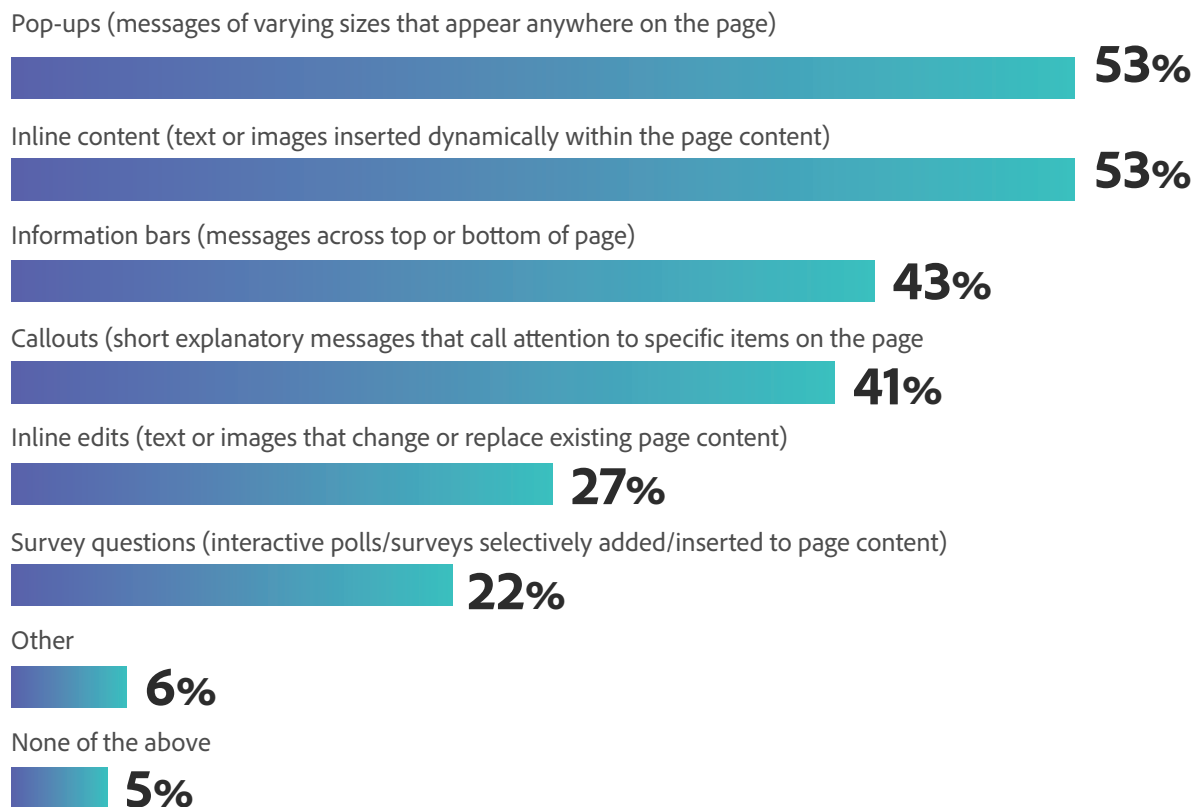
Choose the right place to serve your personalized content.

Where and when you place your personalized content in front of your target audience can impact the overall effectiveness.

Where to use personalization.

You have a wide range of options for where to place content on your website, including the homepage, inner page, blog, or even all of the above. You can also use a number of different visuals—including a floating dialog box, in-zone replacement, or widget—essentially anywhere on your website in a variety of ways. Let's take a look at the most common places.

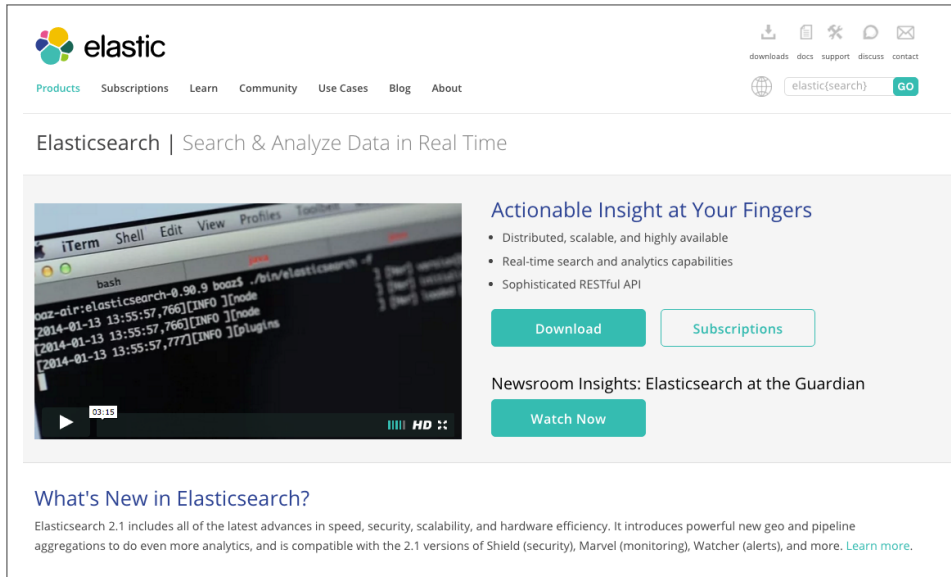
Types of personalized web messages and content used by marketers worldwide.



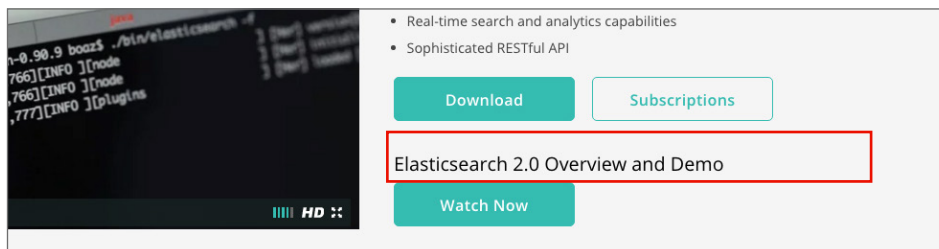
Source: eMarketer, Researchscape

Homepage

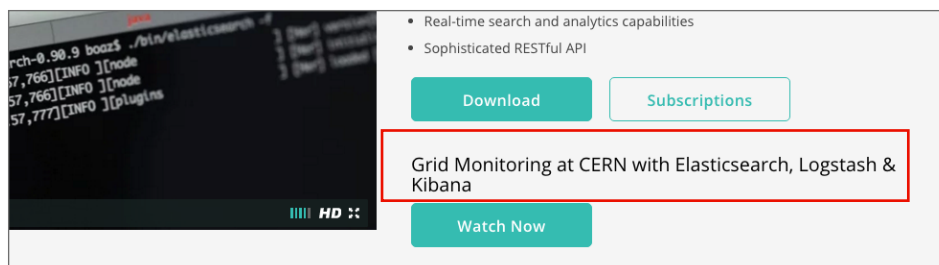
Personalized content sitting on your website's homepage makes the visitor's experience unique as soon as they arrive. In this example, Elastic—a data insights company—customizes their homepage for visitors based on region.



Standard elastic homepage.



Elastic homepage for United Kingdom visitors—note the second call-to-action changes.



Elastic homepage for visitors from German-speaking countries—note the second call-to-action changes.

Inner page

Placing personalized content on the subpages of your website lets you offer visitors unique content based on how invested or deep into your website they get. In many cases, your visitors will not land on your homepage or a designated landing page, but rather on an internal page with good SEO rankings relevant to their previous searches.

Being able to personalize the page no matter where a visitor lands is essential. For example, if a visitor lands on a product page, web personalization would let you show the visitor a video relevant to them based on their industry, gender, or other attributes.

Landing page

Like a personalized web page, a personalized landing page that makes your visitor an offer or aims to convert them can have a major impact. This proves especially true when fine-tuning your digital advertising or email marketing efforts. After delivering a highly targeted advertisement or email, driving your visitors to a nondescript page can leave them feeling disconnected.

A page that continues the conversation will convert at a higher rate. Even though most landing pages are purpose-built for a specific campaign, they may still receive traffic from different segments, depending on the email or ad that motivates prospects to visit the page. Further personalizing the page based on key visitor attributes is even more successful.

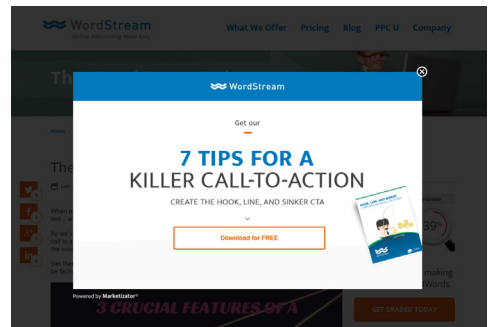
Web personalization tools let you choose to display ads on one or all of the pages we mentioned, using widgets or other visuals across your site. This means visitors will see personalized content wherever they might land.

Beyond that, you can place content on different areas of the page, with some placements being more disruptive and others being relatively unobtrusive to the overall website experience.

The examples show some of the most common ways to personalize on a page.

Dialog

An overlay box that comes up in the middle of the page or on one of its sides and corners is a dialog box. The rest of the page may fade into the background. This is a great option when you want to grab a visitor's attention because it immediately interrupts the visitor. You want to reserve these for high-value offers because a visitor may not respond well to the interruption and bounce out.



In-zone

An in-zone personalized experience happens when the personalization platform replaces a specific area or zone of the website. Many of these zones are identified by DIV tags, used to identify a divider or section, which almost every website has. This makes it easy for you to choose different ones to swap for other cases.

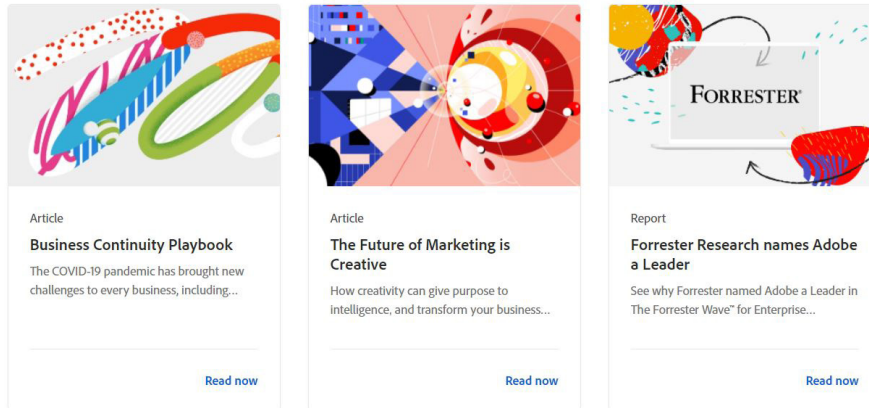


Image A: In-zone section of the website without personalization and with original content.

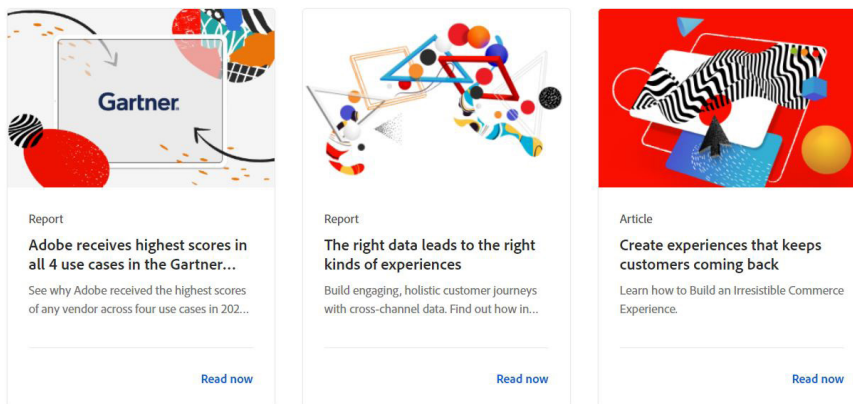
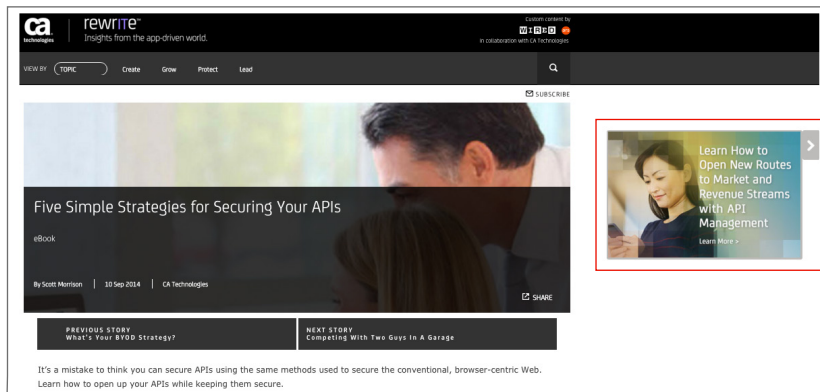


Image B: In-zone section of website personalized with content specifically for "digital customer experiences."



Widget

Similar to dialog-box personalization, widget personalization appears as a user navigates the site. Widgets slide out on one side of the page, delivering an unobstructed view of the page while also offering the user personalized content. An option lets the widget almost disappear and yet remain available for the visitor to review throughout their visit. In the example from CA Technologies—an IT management software and solutions company— you can see the widget appears on the right on designated pages offering articles on security.



Widget example: CA Technologies widget appears only on specific pages with certain content topics.

Redirect

You may have an audience segment who you want to show only specific content. Web personalization can help with this too by quickly identifying the segment and taking them to a page or mini site created specifically for them, with relevant products and messaging. With a redirect, your visitor never reaches the original page they selected. Instead, website personalization identifies them based on their characteristics and takes them to a page more relevant for them.

Ideas for personalization

- Calls to action
- Special offers
- Content item
- eBook
- Case study
- Customer review
- Blog
- Dynamic customer logos
- Event promotions
- Dynamic phone numbers (per location)



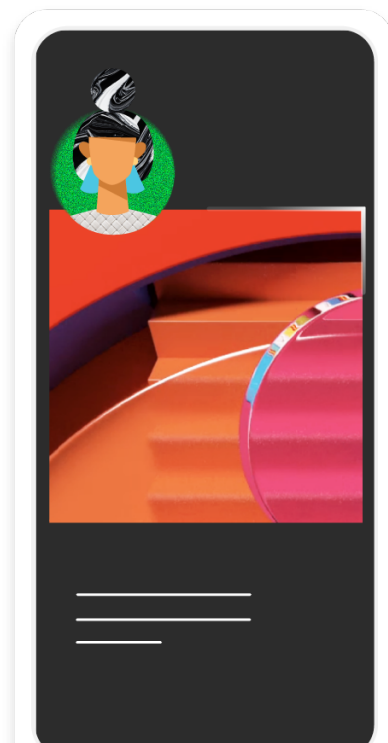
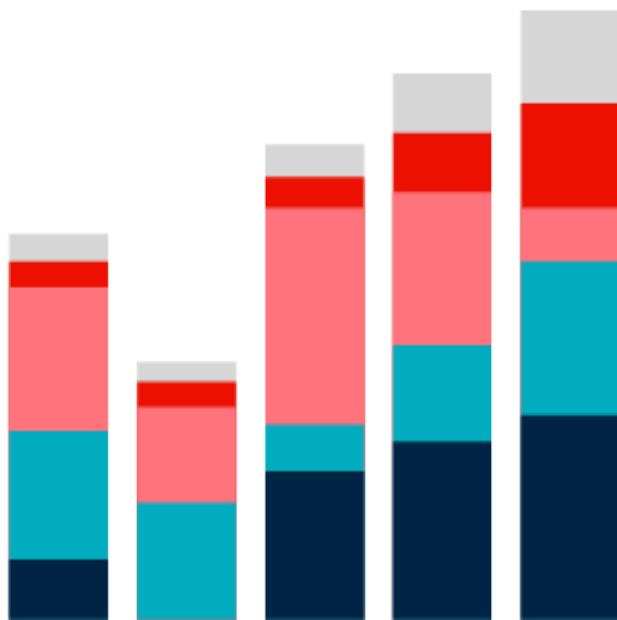
Test, refine, and improve your web personalization.

The measure of success.

Testing your web personalization to determine its effectiveness can help make it one of your most powerful marketing tools. You get real data on which content assets, offers, or calls to action made the greatest difference to your visitors.

Testing is not an afterthought, but an integral element of a successful web personalization strategy and campaign. By using A/B testing, you can improve your campaigns and achieve far greater ROI.

A/B testing is inherently simple—you test only one variable at a time. This makes it easier to reach conclusions that spur action. By assessing the response of prospects and customers, A/B testing reveals what truly appeals to them. A good web personalization tool lets you run A/B tests for specific segments and audiences rather than for your entire audience, which makes the results more relevant. A/B testing also enhances visitor engagement, campaign effectiveness, and marketing expertise.



The benefits of A/B testing.





- 1. It can increase customer engagement.** The goal of A/B testing is to improve interactions between prospects and brands by uncovering which campaign variations resonate most with the target audience. Because this type of testing applies to making everything from personal emails to social networks more engaging, it opens up all channels to stronger communication.
- 2. It enhances campaign effectiveness and fine-tunes programs for a company's target audience.** By trying different combinations of campaign elements for a specific group of prospects and customers, you can eliminate those that alienate visitors or have no effect on conversion rates. Additionally audiences do not all respond identically to a campaign, so by testing different versions, you can identify which campaigns work best for specific segments.
- 3. It improves your understanding of audience preferences.** A/B testing provides businesses with enormous amounts of data on audience behavior. The more tests you run, the more complete your understanding will be. You can then make more informed marketing choices.

What's A/B testing?

A/B testing, also known as split testing, compares two or more versions of the same campaign or message on a channel, so you can determine which works best.

Set up multiple campaigns.

Each campaign contains several different elements, and it's possible to run A/B tests for all of them. The more you use A/B testing, the better your insight for your next campaign. Start by creating more than one version of a campaign for each segment, so you have a basis for comparison. Each campaign might include different calls to action, different content for each stage of the buyer journey, and even unique ad targeting. Be sure to test only one element at a time, so you can easily draw clear conclusions from tests. Many web personalization tools can help by automatically performing A/B tests with minimal setup.

Case Study - Education 1 SEGMENT: California TYPE: Dialog PRIORITY SCORE: 20	Launched ▾	0 Impressions 0 Clicks	 
Case Study - Education 2 SEGMENT: California TYPE: Dialog PRIORITY SCORE: 10	Launched ▾	0 Impressions 0 Clicks	 

An example of A/B tests of healthcare campaigns and their metrics within the Web Personalization app in Adobe Marketo Engage.

What to test.

You can test almost any element of your web personalization campaigns. Here are some general areas to consider.

Messages

- Determine which message and copy resonated the most with your target audience.
- Test different messaging for new versus returning visitors.
- Create seasonal or location-based offers and test them on visitors living in specific regions.

Promotion location

- Test which visual impacted the most conversions and whether you should use a dialog box, in-zone box, or widget.
- Determine the best location in a page to personalize for a specific type of campaign—the main banner, the boxes below it, or the sidebar.
- Test different page designs for new versus returning visitors.

Calls to action

- Change your call-to-action text on your buttons to see which word or phrase, from Buy now to Purchase to Learn more, converts the most visitors.
- Vary the location of your call-to-action buttons and make some more prominent than others.
- Test different colors, shapes, and sizes of images for call-to-action buttons on your website.

Content

- Test different content relevant to a visitor's segment and profile.
- Test gated content against non-gated content. Find out which gets more downloads and whether users are willing to fill out forms.

- Test how and where your content is displayed. Find out if prospects and customers prefer your content to be part of the page or on a pop-up. Determine if you see higher success if visitors stay on the same page or if you ask them to navigate to a specific page.

Copy

- Test different headline texts. Try headlines that are more straightforward, or creative based on your audience.
- Test paragraphs versus bulleted lists.
- Test shorter versus longer copy.

Visual media

- Test different types of imagery—people versus products and photos versus illustrations.
- See how stock images stack up against images of your employees or customers in action.
- Test auto-play against click-to-play for videos.

Site navigation

- Test the order of the menu items in your site navigation.
- Test the display of your navigation bar. See if visitors prefer a horizontal or vertical orientation.

Forms

- Test the length of sign-up forms.
- Try a special offer, discount, or promotion to increase sign-ups.
- Try asking for different pieces of information in your form fields.

Pricing and shipping

- Test a free trial offer versus a free demo offer for short-term and long-term conversions.
- Test annual billing versus monthly billing on your pricing page and determine which generates more subscriptions.

Review what worked best.

Keep track of the insights gleaned from your A/B tests and use them as you prepare your next web personalization campaign. Continue to use A/B testing with each of your campaigns, so you can measure and improve your campaigns over time.

Without A/B testing, you'll never know what might work better in your personalization campaigns. Here are five key metrics you should track when testing.

Impressions and views

Impressions are the number of times your web personalization campaign is displayed to different visitors whether they click on a link or not. Based on your targeting and configurations, customers may see more than one impression of the same campaign.

Clicks

Clicks are the number of times a visitor clicks on your personalized web campaign. Note that some campaigns are not aimed at getting clicks, but rather at providing a better holistic experience for the customer. Examples are displaying a local phone number to provide a more local feel, changing site images based on weather, or displaying company logos relevant to a certain industry.

CTR = Clicks/Impressions

Click-through rate

Click-through rate (CTR) is a measure of the efficiency of a test or web personalization campaign. CTR is the portion of impressions leading to clicks and is a metric you can use to compare the performance of different campaigns. For example, if you run a web personalization campaign on a product page to a segmented audience of 5,000 visitors and on the homepage to an audience of 200,000 visitors, you can use the CTR for each of these campaigns to identify which campaign performed better. So if the campaign was seen 5,000 times (impressions) and 100 users clicked it, the CTR is $100/5,000$ or 2%.

Leads generated

In B2B, leads generated is one of the most important measurement points. This counts the number of leads converted following a successful web personalization campaign. For example, you might be promoting gated content requiring visitors to fill out a form or ungated content that is compelling enough so visitors then choose to contact you.

Revenue and purchase

More typical for consumer and ecommerce sites selling via the web, you can measure the direct impact of your personalization campaigns on online purchases. Some results show the click-to-buy flow, while others show the impact on buying behavior of changes like displaying content that isn't necessarily clicked, such as improved shipping terms for a given location.

How long should an A/B test be?

The length of time depends on how much traffic the site gets. Keep in mind that different company sizes will have different benchmarks. You can even set your test to run autonomously if your web personalization tool offers auto-tuning. Once you set up your test and it reaches statistical significance, the tool will start running only the winning test.

Predictive optimization

A predictive content engine is constantly working to fine-tune how content is served to your website visitors. This engine is effectively an automatic A/B test with multiple variables which are run every time you have a website visitor.

Predictive content recommendation engines test assumptions and make evidence-based conclusions to deliver the most relevant results. Complex algorithms and machine learning form the foundation of prediction optimization, rather than trigger-based content offers.

An advanced tool with predictive optimization is fairly intuitive to use because it's almost 100-percent automatic aside from some configuration options. These tools help you achieve effective results much faster than you could with a manual testing process.

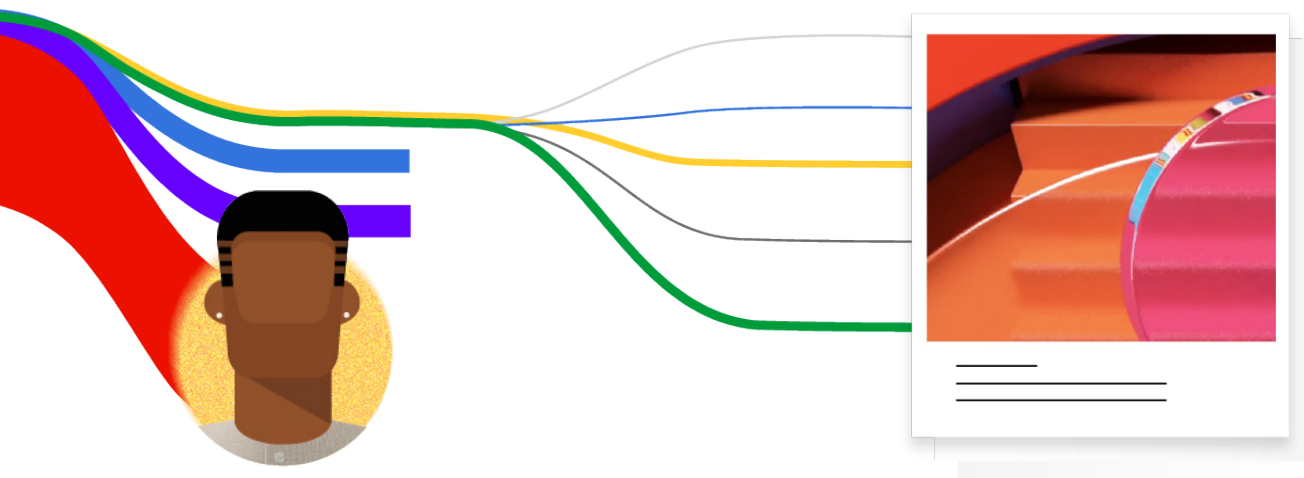
Although predictive optimization is generally an automatic process, you can still learn some lessons from it. You might learn about content gaps or realize that although you promote a specific type of asset more, another type does well organically. Use the learnings you gather from the predictive content recommendation engine to help you adjust your content creation.

Performing testing and optimization.

A/B testing

Integration with analytics tools

A good web personalization tool will integrate easily with other web technologies, letting you get a complete overview of your customer. These integrations often enable the tools to enhance each other's capabilities. For instance, a web personalization tool could integrate with Google Analytics. Web personalization augments the data on the original platform, enhancing understanding of customer activities across channels and benefitting from the data flowing from these platforms. Additionally, you can enrich those platforms with firmographic data that enable better reporting and advanced information analysis.



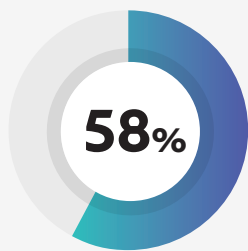
Improve web personalization with a great measurement strategy.

Selecting the right metrics to measure the success of your web personalization is critical, not only for any one campaign but also for determining the ROI of the channel as a whole.

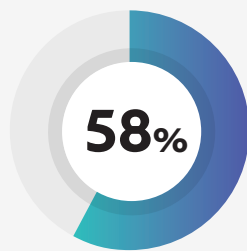
Depending on the goals you set for your web personalization efforts, here are some standard early-, mid-, and late-stage metrics that you may want to track.

Ways marketers measure web personalization.

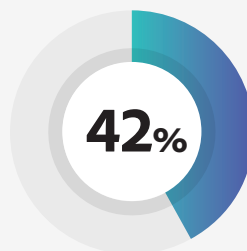
% of respondents



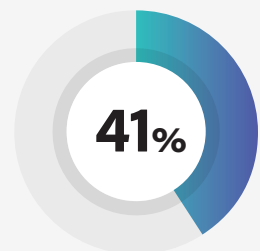
Conversion rate



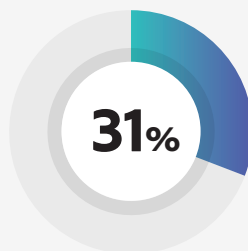
Revenue generated



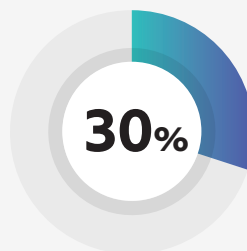
Leads generated



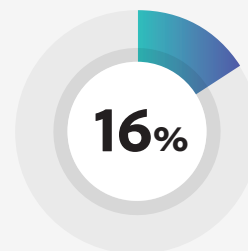
Engagement rate



Pipeline value



Cost per lead



Open or click rate

Source: Three Deep and Ascend2

Get to know the three levels of measurement.

1. Early-stage metrics

These early-stage engagement metrics demonstrate your web personalization campaigns are making an impact and generating interest on your website. Consider measuring the following:

- **Time on site:** Takes the time-on-page metric one step further as it tracks the entire length of time a visitor is on your site, across multiple pages.
- **Visitor frequency:** Tracks how many times the same visitor comes to your site during a time period you select. Revisiting a website is usually a good indicator of interest.
- **Content consumed and pages visited:** Indicates a level of interest and self-education or research. The goal of most websites is to capture their visitors' attention, so having your visitor consume more content and visit more of your site is promising.
- **Volume of known versus unknown visitors:** Can show you the opportunity and potential reach you have with a tool like web personalization. This metric doesn't show engagement, but it's an interesting trend to track over time.
- **New versus returning visitors:** Lets you see the mix of visitors coming to your site and helps you shape your web personalization strategy, such as where in the buying experience you will get more value from personalization.
- **Time on page:** Tracks the amount of time a specific visitor spent on an individual page. A longer period of time generally indicates a higher interest level and is considered a positive indicator. This is closely related to time on site.

2. Mid-stage metrics

Mid-stage metrics, also known as conversion, are focused on catching the right visitor's attention so they become a contact in your database. Finding more of the right visitor types is a key advantage of web personalization and therefore something organizations should always track and measure.

Let's look at some common mid-stage metrics.

- **Actions taken:** Tracks key actions a visitor might take on your site, such as filling out a form, whether for a content asset, coupon, or mailing list. Either way, you learn more about them. This action is also considered as visitor activity. Beyond engagement, driving lead- generating activity on your website is a critical success metric.
- **Contact quality:** Assesses whether the people visiting your website and taking action are the right people. You know your target audiences and you want to attract more of them, so track the volume of the profiles you are targeting, measuring any increases.
- **Lift in digital advertising ROI:** Tracks if the conversion rates improve on pages personalized for visitors who clicked on digital ads that target or retarget them.

3. Late-stage metrics

Late-stage, or revenue-oriented, metrics give you insight into how marketing activities specifically impact revenue and let you see the ROI of these activities. Web personalization generates its own ROI, but also impacts other programs, such as making advertising more effective. You'll want to see the value of your web personalization activities, but also see how they impact ROI across other channels when you make budget allocation decisions. Let's take a look at some late-stage metrics you may want to track.

- **Opportunities:** illustrate how web personalization activities fill the pipeline with sales opportunities. This is a B2B-centric metric, but aside from sales revenue, it's one of the most powerful metrics to show the ROI of your web personalization efforts.
- **Revenue attribution:** is the consumer equivalent of opportunities. It demonstrates what revenue resulted from your web personalization activities, such as on-site purchases and, when applicable, immediate offline purchases, such as contacting a sales center.

Show reports to sales.

If you're in a business with a sales team, at some point you'll need to turn over primed accounts to them to help turn your interested contacts into closed sales. To begin this transition, start putting together reports from your web personalization campaign.

Key organizations from sales territories:

Once the campaign has been up and running, notice which organizations show the most interest in your brand. Determine if these organizations are a good fit for your company.

Key leads coming from sales territories:

If specific decision-makers are located in sales territories, highlight these as well as their level of engagement.

Specific reports on mobile data:

Produce reports on how many leads accessed your materials using mobile devices. This information is valuable for sales reps and is also a key consideration for future campaigns.



Gather your web personalization team.

Prepare to personalize.

Web personalization starts with creating a strategy addressing and supporting your organization's marketing goals. Then, you need to implement it—and the first step is to identify the people and resources you need to get it done.

Web personalization tools can be simple to deploy and can integrate easily into your existing marketing automation platform. Understanding how you want to deploy web personalization will help you identify how to allocate the staff and other resources needed to manage it. We provide separate guidelines based on whether you have a small 1–10 or medium to large (10+) marketing team, so you can determine the best way to allocate your human resources.

You need to consider the following resources when implementing web personalization:

- **Content:** If you don't have existing content you can use, you need to develop it. If you do have existing content, but it needs to be repurposed for specific, targeted audiences, decide who will do this and on what timeline. With smart repurposing, creating content often goes quickly.
- **Technical ability:** Deploying a standard web personalization tool doesn't take much technical skill. For implementation, it's as simple as adding a snippet of JavaScript to your website, similar to what you would do when you deploy Google Analytics. No coding or HTML skills are needed.
- **Marketing automation:** If you are already using marketing automation, you probably have the relevant skill set to support web personalization. In many cases, the same people will use both. If this team is already overloaded, you might need to add resources.
- **Existing activities:** Web personalization becomes an essential part of your current audience targeting and existing campaigns and promotions. Most of the underlying logic of who to target and what to say to them—including the content, images, and messaging you use—already exists and can be reused.

For example, your next event promotion may already have an email invite with relevant text and images, a landing page, and targeting criteria, so there isn't much additional work to deploy it on your site with web personalization.

- **Number of concurrent programs:** The number of different offers, promotions, and target audiences will obviously impact the required resources. Although the possibilities are almost endless, you don't need a hundred campaigns running on day one. Start small and build your campaigns as your team and capacity grows.

Small- to medium-sized teams

With a small- or medium-sized team, any activity you take on requires you to be resourceful to cover as much ground as possible without stretching teams too thin. A small team must focus on the tasks that matter most when carrying out web personalization strategy and pursuing goals. How you divvy up web personalization responsibilities really depends on your marketing organization's structure. Here are a few roles a small- to medium- sized team should consider.

- **Administrator and web personalization champion:** On a team with limited resources, this may be the only role. This person may wear many hats and their day-to-day role may be to manage different aspects of marketing—where web personalization is just one of the programs or channels they work on. Often, this person acts as the centralized administrator for the tool itself and understands every aspect of it. This individual may also execute and report on web personalization success. On a positive note, this person may not need to dedicate more than a few hours each day to running and maintaining web personalization.
- **Power user:** This individual may be a marketer with another role—for example, a field marketer who runs a cross-channel program. Power users understand how to use the tool, including how to add segmentation, create campaigns, and measure success with web personalization as part of their overall cross-channel marketing effort.
- **Creative services:** You may need to tap into your creative services resources to get the tailored images needed to coordinate with your personalized content and offers. If you plan campaigns and offers in advance, this can come as a bundle of requests and be completed all at once.

Get buy-in.

The first step in executing a web personalization strategy for your organization is to assemble a cross-functional team to assess your plan and agree on the objectives and success metrics. You can achieve C-suite buy-in by illustrating how web personalization fits into and supports your organization's marketing goals.

Also consider including team members who will benefit from or help with the deployment, like your web development team, customer lifecycle stage owners, or channel owners.

- **Content creator:** Although you don't need new content to implement web personalization, you do need someone who understands the voice, tone, and unique attributes of your target segments. On a small team, this might be the same person who creates your campaigns. But if you have a content team, you may want to request the small changes you need for each audience through them. If you do plan to create new content beyond repurposing what you already have, a person responsible for content can save you time and make sure content has the correct messaging for your audience.

The bottom line is most small- to mid-sized businesses can show great results with only one or two people focused on web personalization 20% to 40% of the time.

A requirement for web developers.

The best web personalization tools offer quick and easy implementation—as simple as adding a line of JavaScript to your website—similar to Google Analytics.

In some cases, depending on how you want to leverage web personalization, you may require more technical skills. For example, if you want to use in-zone personalization, but your site is not set up with zone tags for the different sections of the page, you may need a web developer to add those to your site template. This would be a short, one-time effort. If you don't have access to a web developer, you can still use a web personalization tool for the other placements on a page.

Large teams

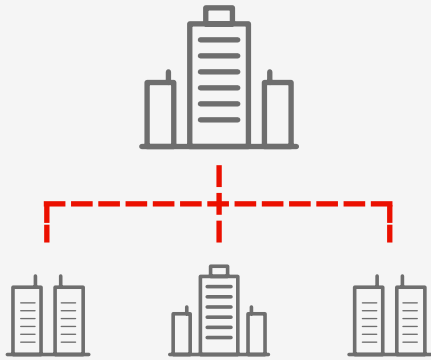
With a large team, there is often more specialization within each role. This can be a great benefit, because you may have the ability to test and optimize for your target segments. You may also have more audiences, products, territories, and business units to serve.

Large organizations handle web personalization in two main ways:

1. Each business unit or territory runs their programs independently, without much more than basic central governance and sometimes even on separate instances.
2. A stronger central team provides campaign services to the business units based on their requirements. The business unit can review results and approve visuals but not launch campaigns. Although this method relies heavily on the existing structure of your marketing team, it is sometimes more suitable, because one site typically hosts all products and receives traffic from all audiences.

Certain responsibilities, like the ones described for small teams, are critical to a sound web personalization strategy and should be a part of every team. If you can invest in additional personnel, it's a good idea to ensure the following responsibilities are covered:

Each business running their own programs



A central team that provides campaign services to the business units

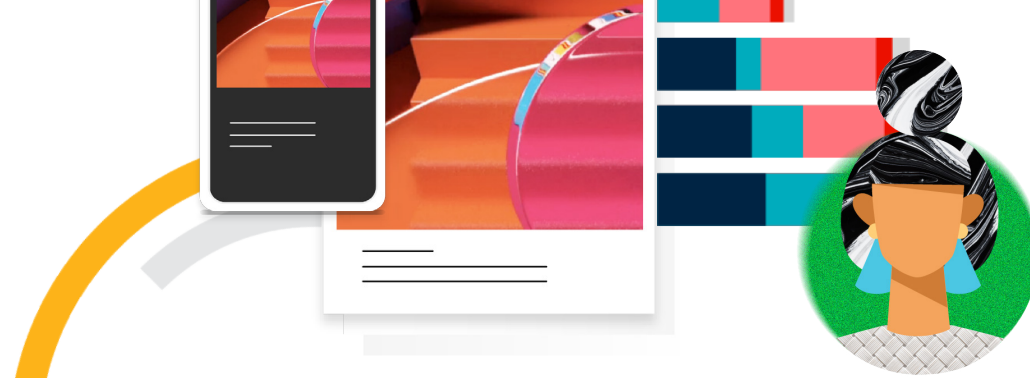
- **Dedicated web personalization**

strategist: Having a single person responsible for understanding how your web personalization activities complement other cross-channel marketing activities can be a huge advantage. The dedicated strategist is responsible for educating the marketing team about the capabilities and benefits of web personalization. In addition, they should understand marketing activities across the organization and identify opportunities to implement web personalization and make an incremental impact.

- **Data analyst:** Teams don't always have an individual with time to devote to data. With a large team, someone can take on

this role full-time, assessing the effectiveness of various campaigns and then making recommendations for the future. Although the auto-tuning and content recommendation elements of your web personalization tool add an automated element to making these decisions, having someone dedicated to the data can produce a higher ROI from your web personalization efforts. In many cases, the data analyst is responsible for analyzing channel performance—web, email, paid ads, and social ads—and the interaction between them.

- **Cross-functional power users:** Unlike small teams, a large team may include individual program owners and therefore many more people interested in personally implementing web personalization as a part of their campaigns. These power users are responsible for creating a custom web experience for a specific segment or audience within their campaigns.
- **Content creator, web developer, and designer:** As web personalization scales across your organization, so will the demand for unique designs, targeted content, and specialized web personalization campaigns. Each will require resources from their respective teams or even an individual responsible for that role on your web personalization team.



Build your web personalization toolbox.

Moving forward with web personalization.

Web personalization is critical for speaking to customers as individuals and with relevant messages. When you use web personalization as part of your marketing mix, you open up scores of possibilities to improve your customer experience—and your business results.

To make web personalization an integrated part of your marketing programs, you need an appropriate tool. Implementing a web personalization tool lets you spend time planning strategic campaigns, rather than assembling the right people and resources to execute all the technical details.

Web personalization is a low-risk, high-reward marketing activity. If you are already marketing to segments or personas across your other marketing channels, and you have a website and a few offers or pieces of content, you have everything you need to get started and to get ahead of your competition. Use the checklist in the next section to know what your requirements should be for a web personalization tool.

Any content management system. Any content. Zero IT help.

An intelligent web personalization solution requires no IT implementation or management. The tool simply clicks into place with your existing content management system (CMS), letting you access even more information and feedback on your content marketing. It's that easy.

What to look for in a web personalization tool.

Use this checklist to help you select a web personalization tool and set your team up for success.

Targeting	YES	Technology	YES	User interface	YES
Targeting both anonymous and known visitors		Built on or deeply integrated with a marketing automation platform		Easy to use and intuitive, designed with the user in mind	
Can target based on location		Connects to ad networks for visibility into digital advertising engagement and nurturing		1. Provides value quickly—leaves the effort in planning, not executing	
Territories		Applies big data and analytics to deliver predictive content recommendations		2. Out-of-the-box connectors to lead data	
Countries		Auto-detects content and analyzes content performance		3. WYSIWIG editors for segment and campaign creation	
States		Does not require coding or technical knowledge		4. Through analytics	
Cities		Provides campaign prioritization		5. Web, email, and mobile reports (real-time and scheduled)	
Zip codes		Provides optional APIs			
Can target based on behavior		Supports segment-based A/B testing			
Search terms		Supports responsive design			
Referrals					
Pages viewed					
Number visits					
Can target based on contact data					
CRM data					
Can target based on firmographics					
Company names					
Industries					
Size					
Revenue					
Can target based on predictive models					
Supports account-based marketing					

Strengthen your relationship.

The data is indisputable—consumers and decision-makers expect companies to know them and to offer personal experiences. Web personalization helps companies become more effective at doing this.

Web personalization is no longer a marketing vision, but a reality. Modern technology continues to make web personalization more attainable for marketers at any level and organizations of any size—with easier implementation and coordination across channels. Best of all, you can implement web personalization using systems you already have in place and content you already have.

In an increasingly competitive digital marketing landscape, being personal, relevant, and timely is vital for your company to set itself apart and prove to customers that you have the right products and services for them. Web personalization makes this possible. You'll have the power to deliver a personal message to each customer every time they visit your web site. They'll feel known and appreciated, putting you in position to captivate and convert them, convince them to purchase again, and turn them into loyal brand advocates.

About Adobe Marketo Engage

Adobe Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Adobe Marketo Engage.

About Adobe Experience Cloud

Adobe Experience Cloud is the most comprehensive suite of customer experience management tools on the market. With solutions for data, content delivery, commerce, personalization, and more, this marketing stack is created with the world's first platform designed specifically to create engaging customer experiences. Each product has built-in artificial intelligence and works seamlessly with other Adobe products. And they integrate with your existing technology and future innovations, so you can consistently deliver the right experience every time.



Sources

["2018 B2B Buyers Survey Report: Sales Representatives Play Greater Role within Critical 1–3 Month Active Buyer Timeframe," Demand Gen Report.](#)

["2021 Consumer Experience Sentiment Report," Merkle.](#)

Andrew Saville, ["Personalization in Marketing—Where's the Line between 'Cool' and 'Creepy'?"](#) Experian Marketing Services.

["Building Brand Loyalty in a Cross-Channel World,"](#) Experian Marketing Services.

Caroline Malamut, ["Statistics that Prove Email Marketing Is \(Still\) Not Dead,"](#) Capterra, February 4, 2016.

["Consumers Say They Want More Relevant Website Experiences,"](#) Marketing Charts, July 31, 2013.

["GE Capital Retail Bank's Second Annual Shopper Study Outlines Digital Path to Major Purchases—81% Research Online Before Visiting Store,"](#) GE, July 12, 2013.

Janessa Rivera and Laurence Goasduff, ["Gartner Says Worldwide Device Shipments to Grow 1.5 Percent, to Reach 2.5 Billion Unities in 2015,"](#) Gartner Newsroom, July 6, 2015.

Jay Peyton, ["What's the Average Bounce Rate for a Website?,"](#) Rocket Fuel.

Jon Cifuentes, ["New VB Insight Research Shows Web Personalization Is Not Just for Amazon,"](#) Venture Beat, September 23, 2015.

Kelly Blum and Gloria Omale, ["Gartner Says 63% of Digital Marketing Leaders Still Struggle with Personalization, Yet Only 17% Use AI and Machine Learning across the Function,"](#) Gartner Newsroom, April 14, 2021.

Kresten, ["Anonymous Visitors Are Your Only Real Source of Income,"](#) Monoloop, April 25, 2017.

Lenna Garibian, ["Personalized Marketing Drives Buyer Readiness and Sales,"](#) MarketingProfs.

["Marketers See ROI Benefits of Personalizing Based on Social Graph,"](#) Marketing Charts, June 28, 2012.

["Marketing Automation Trends for Success: 2016 Benchmarks from Best-in-Class Companies,"](#) Three Deep.

["The New Multi-Screen World Study,"](#) Think with Google, August 2012.

Nora Aufreiter, Julien Boudet, and Vivian Weng, ["Why Marketers Should Keep Sending You Emails,"](#) McKinsey & Company, January 2014.

["'Quantified Self' Digital Tools: A CPG Marketing Opportunity,"](#) Rocket Fuel, January 15, 2015.

["Shoppers Demand Superior Ecommerce Experiences,"](#) Avionos.

["Types of Personalized Web Messages/Content Used by Marketers Worldwide, April 2015,"](#) eMarketer, June 17, 2015.



© 2022 Adobe. All rights reserved.

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