

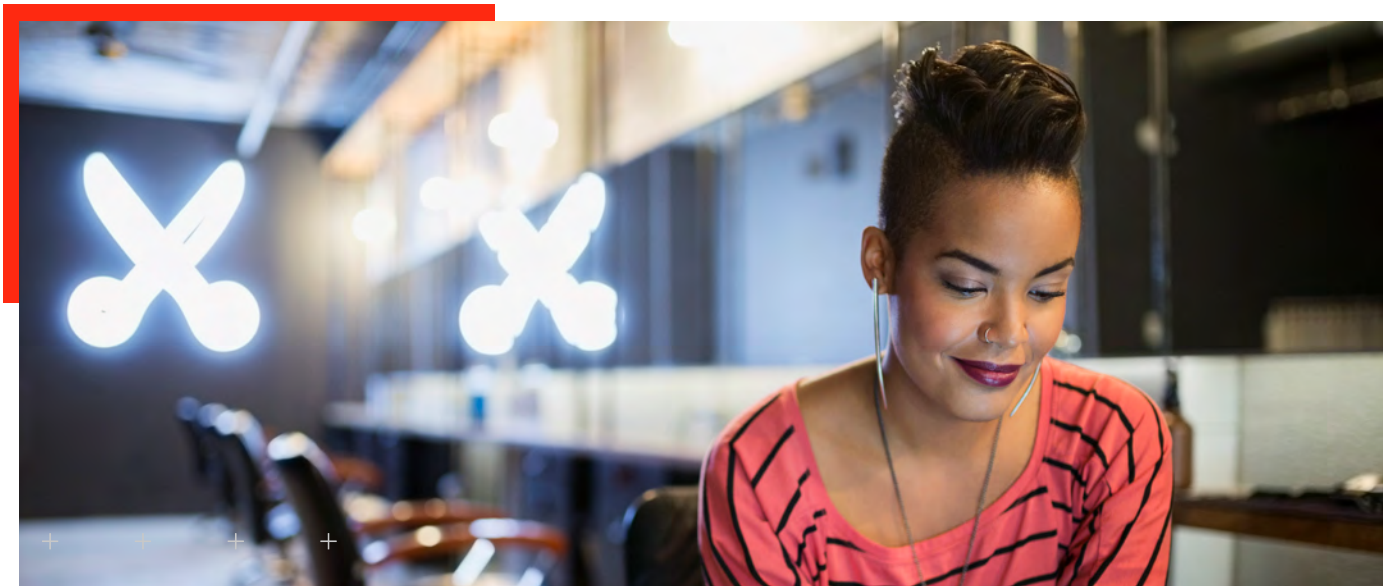
CREATING DIGITAL EXPERIENCES

# How to gain quick wins and personalize successfully

Guide 4 of 4







## — Prepare to win

Personalization can be an intimidating prospect for marketers. You know your audience craves memorable, tailored interactions at every touchpoint, but getting reliable data is hard enough, let alone putting it to use and developing compelling omnichannel experiences. You are, however, in good company. 33% of the global marketing leaders we asked in our recent survey – carried out in association with the Society of Digital Agencies (SoDA) – rate their organization as beginners or novices on the subject.<sup>1</sup>

While some of us are timid, others are on the other end of the spectrum. Nearly 70% of global organizations consider themselves experts in personalization, but less than 40% are currently using even the most basic data to support their personalization programs. We believe we’re delivering robust, dynamic personalization programs, while not applying one of the key ingredients (feedback) for success.

The aim here isn’t to point fingers. It’s to point out that the vast majority of us are still learning. Whether you consider yourself a beginner or you’re just realizing you don’t know as much about personalization as you thought, we can help you reach the next level. In this guide, we’ll explain how you can achieve a higher level of personalization using a framework for quick wins that demonstrates business value, which will help justify further investment in your personalization program.

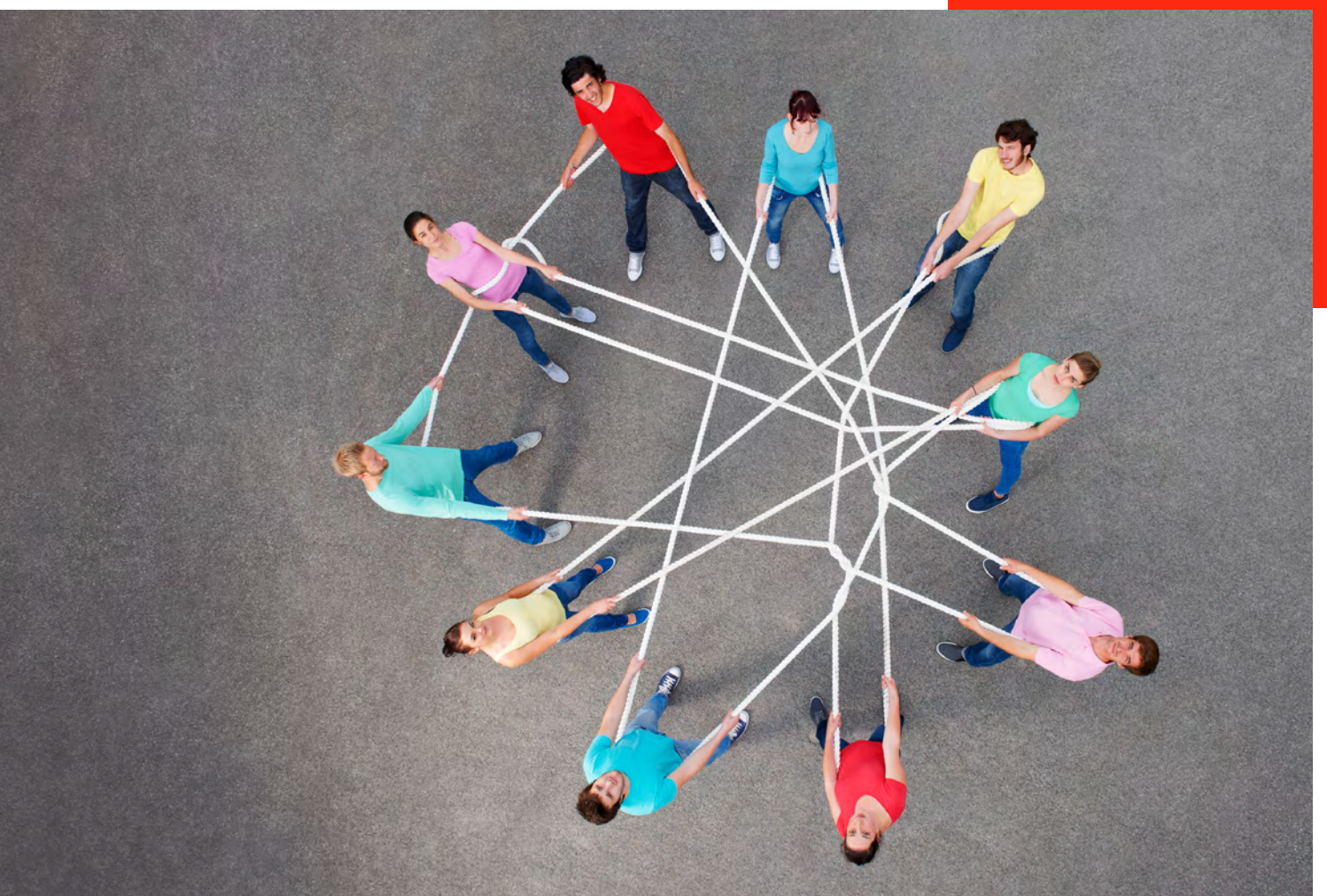
## — Step 1: Establish the right team

Assemble a team of cross-functional self-starters that are able to get the quick wins necessary to build your business case – as well as scale your efforts over time. As you manage change and your program builds momentum, you'll likely attract others in the organization who may be able to contribute, even if their actual role isn't an exact match. Your team could consist of the following roles:

**Content marketer:** Works closely with your digital strategist, experience architect, and agency partners to create all content (personalized and non-personalized) for your site.

**Commerce specialist:** Has a good understanding of how commerce fits in the customer journey and is responsible for driving sales on digital channels.

**Digital analyst:** Provides insights into customer journeys and intent, as well as channel and campaign performance.





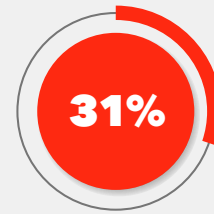
**IT representative:** Balances timeframes, marketing needs, and IT capabilities to build the best possible solutions.

**Marketing technologist:** Works alongside a digital strategist to implement and optimize. Ideally requires hands-on experience in optimization, analytics, automation, or e-commerce.

**Experience architect:** A UX designer with strong CX acumen, who designs and governs the entire digital customer experience. Additional responsibilities may include measurement and optimization of personalization efforts. Technical knowledge and excellent understanding of marketing tactics is required.

**Digital strategist:** Develops cross-channel digital strategies. Responsible for building business cases for your context marketing initiatives.

**Sitecore partner:** An experienced Sitecore partner who helps marketing visualize the possibilities, while working with IT to optimize the technology. Some of the roles listed might even be outsourced to partners to round out your team as you scale.



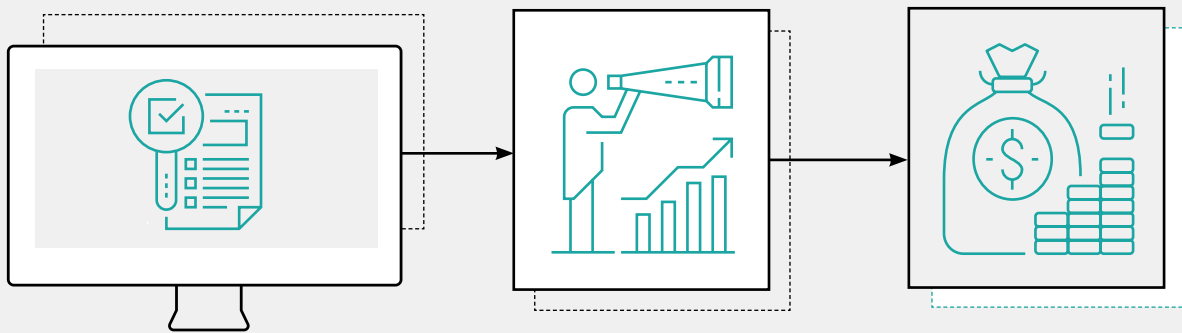
31% of marketing leaders said that their internal staff's capabilities were one of the main barriers to delivering more personalized experiences.

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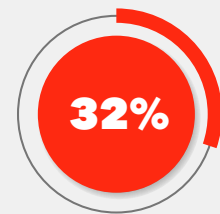
## — Step 2: Start with a simple framework

By building a Strategic Objectives Framework, you can visualize how digital goals drive marketing objectives and how marketing objectives impact corporate strategic objectives. For example, if you can inspire more people to sign up for your newsletter (digital objective), you will ultimately increase customer acquisition (marketing objective), which in turn will increase revenue (strategic objective).



The process of building a Strategic Objectives Framework begins with two or three high-level people defining the strategic theme(s) of your organization. Most businesses have one or two strategic themes. If your company has more than three, you're likely wasting resources and diluting your brand.

This same small team should identify the single most important strategic objective that marketing can achieve to contribute toward the strategic theme. Of course, marketing can impact more than one strategic objective, but you want to identify one objective where your customer experience can have the most measurable and irrefutable impact. With that strategic objective on the wall (literally), get your cross-functional team of 8-12 experts to brainstorm which digital goals drive your most important strategic objective.



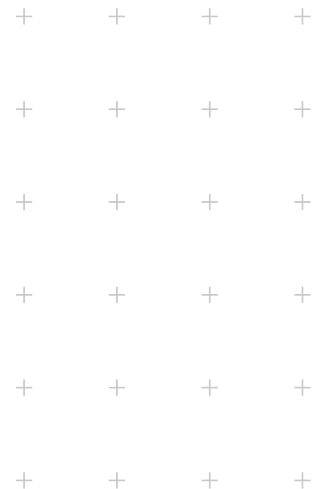
of global marketing leaders say they don't have the executive team buy-in needed to personalize effectively.



### Step 3: Set your engagement values

Sitecore's Engagement Value Scale enables you to determine the impact of specific digital goals on your strategic objectives by assigning Engagement Value Points to each digital goal. For example, requesting a call could be set at 100 Engagement Value Points, viewing a product detail page at 75 Value Points and searching for a product at 50. Adding a product to the shopping cart, however, could be 95 Value Points, while registering for a newsletter has only 5 Value Points. As visitors complete actions, such as registering or requesting a quote, they accumulate Engagement Value Points.

Visitors whose behavior helps achieve your strategic objective accrue higher Engagement Value. As they travel through channels, respond to campaigns, or download assets, you can track which marketing efforts attract the highest aggregated Engagement Value from all visitors. (If you have Sitecore Experience Platform, this is done for you.) The Engagement Value becomes a new KPI that is unavailable through traditional web analytics. It is a true measure of visitor behavior and is a proxy for return on marketing investment (ROMI). This allows you to easily identify the marketing tactics, such as campaigns, that have the greatest impact on marketing objectives (and therefore the greatest impact on your strategic objectives).

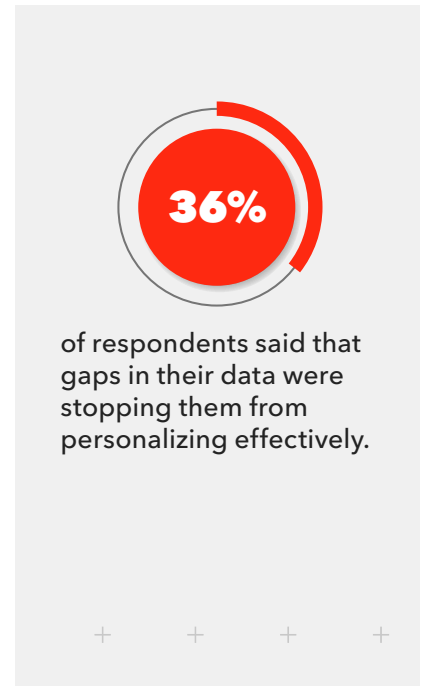


## Step 4: Target segments for quick wins

It's easy to be overwhelmed by choice when you begin personalizing customer experiences. So focus on identifying key customer segments that can get you a quick win. The key to really understanding segments is to understand the journeys your customers take.

Here are some attributes that can be helpful for segmentation: (ordered in terms of ease of implementation – from more basic to advanced)

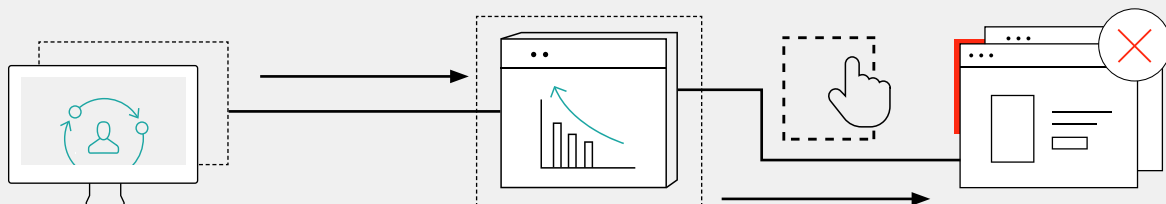
- Geographic location of visitor
- Whether they are a new, repeat, or loyal visitor
- The marketing campaign(s) visitors respond to
- What product or service they view the most
- Whether they did a product search
- Whether they viewed the product details or looked for variants (size, color, configuration, etc.)
- Intent, motivation, behavior
- Psychographics, demographics
- Where they are on the customer journey



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### Easy as PIE

You don't need to pin down every segment straight away. Use the PIE method to focus on relevant segments:



#### P is for Potential

Is there a large potential to meet our strategic objective if we target this segment?

#### I is for Importance

Is the segment big enough to make an impact?

#### E is for Ease

Is the segment easy to identify on arrival at your site or within a few clicks?

If the answer to all of these questions is yes, then go ahead and target that segment.

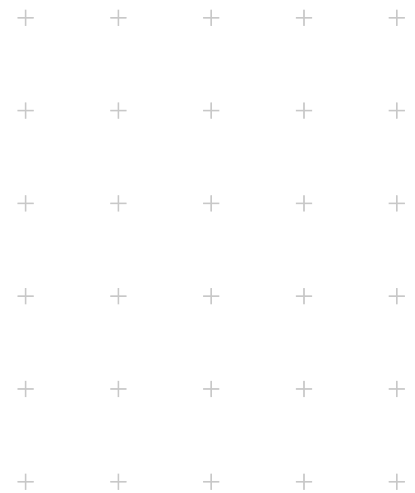


## Step 5: Map their path

Once you understand your key visitor segments, you can start to map their journeys. And by analyzing their journeys, you can create a Digital Relevancy Map for each segment. To map the journeys of your key visitor segments, begin by identifying the most important touchpoints, such as:

- Entry point
- High-volume visit points
- Decision points where visitors split or change directions
- Conversion points
- Points of disconnect where experiences fail

We've learned that even just personalizing the homepage banner or storefront can create a significant impact, so this might be a great place to start. From here, you can map the content at each touchpoint to customer intent and experience objectives. The content you deliver at each stage should persuade customers to complete the digital task and move to the next stage in the journey – nurturing them through the journey and helping you achieve your overall business objectives.



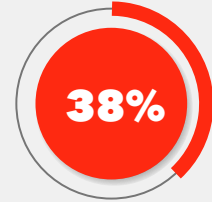


## — Step 6: Prove your success

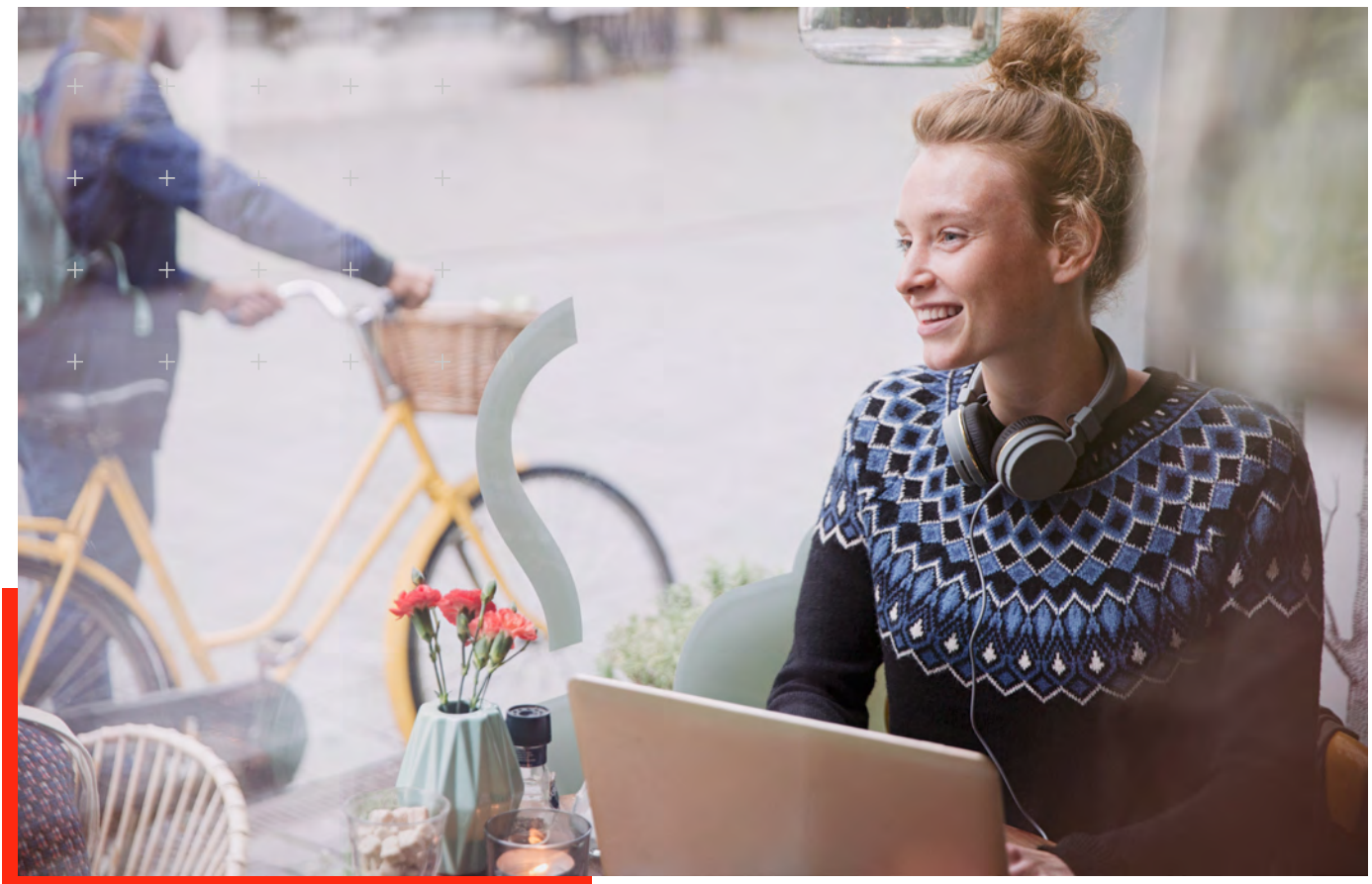
When it comes to demonstrating the success of your first personalization project, you've got a couple of options:

- Benchmark key metrics and compare results before and after the personalized customer experience
- Conduct A/B testing with personalized and non-personalized content to prove the impact of your initiative

Your positive results will help demonstrate to your executive team the added business value derived from personalization, which should help justify evolving the quick wins project into an ongoing personalization program. Use anything that didn't work quite so well as a learned lesson ahead of your next campaign - tweak, refine, and optimize as you progress through your personalization journey.



38% of marketing leaders say that data & analytics will be one of their top two investment priorities over the next two years, while 33% say technology platforms will be in their top two.



## Discover more

Our Global Trends in Personalization report contains more insight into how businesses are approaching personalization - and you can read it for free below.

[Download the full report](#)



## Contact

For more information, email us at [sitecoresales@sitecore.com](mailto:sitecoresales@sitecore.com) or visit [sitecore.com](http://sitecore.com)

## About Sitecore

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