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Delivering Personalized Content

for
dummies[®]
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Offer exceptional
digital experiences

—
Work seamlessly
across channels

—
Scale up with the
cloud and AI

Adobe
2nd Special Edition

Stephanie Diamond

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As part of the Adobe Experience Cloud, Adobe Experience Manager Sites is an AI-powered content management system that's built on a scalable, agile, and secure cloud-native foundation. With Adobe Experience Manager Sites, businesses can create, manage, and deliver personalized experiences across all channels with automated tools that make scaling effortless.

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Adobe 2nd Special Edition

by Stephanie Diamond

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Introduction

As the world has shifted to be digital-first, customer behaviors have also quickly changed. More and more, people demand fast, relevant content experiences that move seamlessly with them on any channel and device. To meet those expectations, your content and data need to be easily accessible and paired with a flexible content management system (CMS).

This change to your ecosystem will allow you to deliver the custom, scalable content that your customers demand. This book is designed to help you understand how to propel your customer experiences to a new level of personalization that will give you a strong competitive advantage.

About This Book

Welcome to the 2nd Special Edition of *Delivering Personalized Content for Dummies*, brought to you by Adobe. This book shows you how to build a digital foundation to deliver personalized experiences at scale.

I cover several topics, including the following:

- » Understanding why personalization matters
- » Creating, managing, and delivering content
- » Working seamlessly across channels
- » Focusing on what data to track and measuring success
- » Utilizing the cloud to scale up and delivering great experiences using artificial intelligence (AI) and machine learning (ML)
- » Addressing ten personalization challenges faced by brands

Icons Used in This Book

Throughout this book, icons highlight important information. Here's what they mean:



TIP

The Tip icon highlights information that can make doing things easier or faster.



REMEMBER

The Remember icon points out things you need to remember when searching your memory bank.



WARNING

The Warning icon alerts you to things that can be harmful to you or your company.



TECHNICAL
STUFF

Sometimes I give you a few tidbits of research or facts beyond the basics. If you like to know the technical details, watch out for this icon.

Beyond the Book

This book will help business leaders like you discover more about personalization. If you want resources beyond what this short book offers, visit these links to discover more about the following topics:

- » **Digital Foundation** <https://business.adobe.com/solutions/use-cases/digital-foundation.html>
- » **2022 Digital Trends report** <https://business.adobe.com/resources/digital-trends-report.html>
- » **Getting Started with Personalization at Scale** <https://business.adobe.com/resources/reports/getting-started-with-personalization-at-scale.html>
- » **Feeding the Content-data Loop** <https://business.adobe.com/resources/reports/feeding-the-content-data-loop.html>
- » **Content Management** <https://business.adobe.com/solutions/content-management.html>

IN THIS CHAPTER

- » Recognizing why personalization matters
- » Evaluating your current reality
- » Understanding the Digital Foundation Model

Chapter **1**

Understanding the Importance of Exceptional Digital Experiences

Just imagine if you could listen in on the silent conversation your customers have with your brand touchpoints. You'd hear what they think when they read your content, find you on social platforms, and see what others are saying about you. If you could tap into your customers' needs and wants, you could give them exactly what they want, right when they want it. That's a tall order. And it's one that requires the right strategy, technology, and people to get the job done.

This chapter shows you why personalized experiences are no longer optional and how you can create a digital foundation that will help you build lasting relationships with your customers.

Getting Started

So where are companies today? Brands are trying to stand out by differentiating their products and services, and to do that, they need to capture customers' attention and meet their rising expectations. That means brands need to understand their audiences and their interests, as well as engage them in personalized ways across channels. They should make recommendations that encourage customers to come back and keep coming back. If they don't make relevant information available at each stage of the customer journey, their competitors will.

Fortunately, with a strong digital foundation, personalization is more feasible than ever before. Consider some of the changes that have made this possible — and necessary:

- » **Commoditized products.** You can buy almost anything online. Products have become commoditized. Now the job of a brand is to differentiate itself by delivering unique customer experiences. Personalizing content builds loyalty and removes the friction that keeps the customer from quickly moving to competitors.
- » **More sophisticated search tools.** When people first began using the web for business, they would start searching at a company home page and move around by clicking the links you set up for them. As users grew more sophisticated, and Google emerged as a ubiquitous search engine, customers could search for things without following the path you set. They could use different devices and forge their paths in their own time from anywhere. Searching became a self-serve model. Brands were no longer in control.
- » **Availability of data in real-time.** Now that companies can capture data and make improvements in real-time, consumers have raised expectations about what they will experience. They have grown to expect an "Amazon-like" personalized experience from all the brands they do business with. If they don't get it, they move on.
- » **Marketers who are empowered to create and publish without IT.** Now that marketers have tools that don't require them to rely on the IT department, they are free to experiment and make changes themselves.

» Technologies such as AI and ML that have changed a company's ability to analyze and use predictive analytics. These and other tools allow brands to scale up and deliver better, more personalized and relevant content without needing human intervention.



TIP

Adobe's report *Failure to Scale: The State of Personalization in Retail and Travel* (<https://business.adobe.com/resources/reports/failure-to-scale-state-of-personalization-in-retail-and-travel.html>) states that companies see a 10x improvement in conversion rates when moving from basic to 1:1 personalization.

Delivering on your customer-centric mindset

When you think about delivering outstanding customer experiences, you likely imagine all the “wow” things you can do to amaze your customers. Those things are important, but taking a customer-centric approach requires you to flip from thinking about your message to thinking about what your customer wants to know at every point in their journey and how they can accomplish their goals.



TIP

According to Adobe's *2022 Digital Trends* report, 50% of senior executives are increasing 2022 investments in platforms that enable personalization at scale. (<https://business.adobe.com/resources/digital-trends-report.html>)

Customers start with the idea of *relevancy*, *convenience*, and *respect* for their privacy, and they want you to deliver experiences that tell them you:

- » **Know who they are**, where they are located, and in what timeframe they can interact with you (hour, day, and so on).
Example: They want to be sent relevant coupons based on their location and browsing/purchasing history.
- » **Know their interests** so you can deliver the most relevant information and product or service recommendations.
Example: When they log on to your website, they appreciate an experience that relates to their previous browsing behavior and highlights special offers for the last items they browsed. Consumers also enjoy learning about a product

that is complementary to one they previously bought — like an ink cartridge for the printer they purchased.

- » **Can deliver an engaging experience across all their devices**, whether desktop, phone, tablet, internet of things (IoT) devices, and so on, so there is no disruption in their interactions with you when purchasing products or getting information. *Example:* They want you to recommend products to them and make sure they can easily order from their mobile device, then check for delivery updates on their iPad.
- » **Eliminate friction caused by moving across channels** so they can carry on a cohesive conversation with your brand. *Example:* They want you to know that if you engage with them about customer service on Twitter, they can pick up the conversation on your website's support page.
- » **Know which channels they prefer** and how they found you so you can be where they are when they need you to help them decide. *Example:* They want you to know which channels they use so you can make sure to deliver the information they need from that specific channel. If the customer likes to access forms from your app, make sure all necessary forms are available there.
- » **Will responsibly use their customer data** in ways that ensure privacy and security. *Example:* They want you to know that they appreciate a personalized email about their financial well-being, but that their information must be protected with the highest level of security.



TIP

One goal of personalization is to help make purchasing decisions *easier* for customers and anticipate their next need. By helping them determine what their best choices are, they'll reward you by becoming loyal customers and potential brand advocates.

Identifying your personalization and business goals

To start building your digital foundation, you need a plan to set your goals and assess your current status so you know what needs to be done. Then you need to decide which key performance indicators (KPIs) you will track. You want to ensure that you keep your overall business goals in mind as well as specific personalization goals. (For more about using KPIs and analytics, see Chapter 4.)

Assessing Your Current Reality

To understand your current ability to deliver personalized experiences, you need to ask questions that will determine where to put your focus. Here are several to consider:

- » **Customer profiles.** How complete a view do we have of our customers and their interactions with us? What internal data and third-party data is available to us?
- » **An integrated platform.** Do we have a centralized source to design, launch, and measure campaigns and experiences at scale?
- » **Security.** How secure are our experiences?
- » **Privacy.** How personal is too personal? Do we know what privacy concerns our customers have?
- » **New media and channels.** How prepared are we to incorporate new or emerging media and channels in our experiences?
- » **Efficient processes and collaboration.** How efficient are our processes? Who owns what? How well do we understand each other's roles and collaborate with other teams?
- » **Updates and adaptability.** How adaptable are our experiences? How easy is it to create and update these experiences?

Introducing the Digital Foundation Model

Developing exceptional personalized experiences requires you to take several steps to achieve success. After you have done the hard work of assessing where you are now, you need to look at the next steps to take to build a strong digital foundation. Here are four steps you can follow using the Digital Foundation Model (see Figure 1-1):

1. **Create, manage, and deliver digital assets.** At this step, look at the tools you need to structure and manage digital assets from a single platform to create and deliver

exceptional experiences at scale. Also consider the team you need to put in place. See Chapter 2 for more details.

2. **Deliver consistent and meaningful experiences across channels.** During this step, look at mapping your customer journey across all your touchpoints to deliver an omni-channel experience and assess what tools are needed. See Chapter 3.
3. **Optimize experiences by tracking, measuring, and making changes based on results.** At this step, look at evaluating the data you are tracking to determine if you are successful and what you need to do to improve. See Chapter 4.
4. **Scale-up by leveraging the cloud as well as AI and ML.** During this step, leverage the cloud and use AI and ML to extract insights that help you create improved customer experiences. See Chapter 5.



FIGURE 1-1: The Digital Foundation Model lets brands create, deliver, and optimize digital experiences at scale.

IN THIS CHAPTER

- » Reimagining content strategy and technology for personalization
- » Creating content experiences
- » Understanding the roles of team members

Chapter 2

Creating, Managing, and Delivering Digital Assets

To meet the demands of a digital-first customer engagement strategy, teams must adopt new organizing principles, content workflows, and emerging technologies. Content strategy, architecture, and automation are key elements for building a modern content supply chain that supports personalization across the customer journey. The starting point is picking the right digital asset management (DAM) system. This chapter shows you the value of using an integrated DAM and CMS to create, manage, and deliver content, and looks at the roles team members play in developing great customer experiences.

Building the Foundation for Delivering Personalization

A DAM should be the central platform where all other content creators and applications go to interact with assets. Think about it as a hub and spoke wheel. The hub is the DAM, and the rim would be workflow management tools. Each spoke would be applications like a product information management system (PIMS), CMS, creative tools, and people all tied together to create a wheel

that supports the business and delivers content wherever it needs to go.

Managing digital assets

Here are just a few of the processes a DAM facilitates:

- » **Alignment.** All of the assets within the DAM, their metadata, and taxonomy must be aligned to be able to find, assemble, and reassemble content. Every application that collaborates with the DAM needs to share and participate in this alignment from the ideation to the delivery of an asset.
- » **Governance.** Those assets also must have a governance system in place. Governance should also consider users/user groups, metadata, and workflows to ensure that the team uses the most up-to-date version and only allows authorized people to view it. It also helps manage legal rights and permissions.
- » **Content at your fingertips.** Manage a single, global asset repository. Bulk upload assets and import complex folder hierarchies with a drag-and-drop interface. AI helps make digital assets easily discoverable with advanced metadata management, intelligent smart tags, dynamic search facets, and intuitive visual searches.
- » **Enable creatives.** Your creative team works in the design programs of their choice to create images, infographics, text, and so on. Those assets then must be broken down into small pieces (sometimes this is referred to as *atomized content*). They can then be brought back together in various configurations to suit the needs of campaigns and events.

Without a central repository, designers would need a duplicate asset residing on each web location. That might require thousands of copies of the same image, and someone would have to go to each place to update it. Designers need to be able to revise the asset once and find it quickly when it's needed again.
- » **Automate asset workflows.** Generate millions of asset renditions quickly whether you are cropping, creating banners, or replacing logos at scale. Rich media technologies allow optimization for any device, browser, or experience. You can also develop next-generation experiences to support 3D assets alongside panoramic, VR, and 360-degree video viewers.



REMEMBER

Creating content experiences

After looking at what you need to manage digital assets, the next step is to look at publishing those assets to different channels, including a CMS. A CMS assembles the right personalized content for each part of the customer journey and facilitates the following:

- » **Content personalization.** To deliver the right experiences, your CMS utilizes data from the entire customer journey. It then tailors the experience depending on who the customer is and what they are trying to accomplish. For more on capturing the right data, see Chapter 3.
- » **Omnichannel delivery.** Speaking of the customer journey, you also need to reach your audience wherever they are. The goal is to deliver experiences on the right channel at the right time. The CMS formats it correctly for any touchpoint and supports content reuse across channels.
- » **Authoring tools.** A CMS provides easy-to-use authoring tools for non-technical users to create engaging experiences and get to market fast. Because IT doesn't need to be involved, you can create whatever you need quickly to connect with your customers faster.
- » **Content publishing.** Publishing content is done both as a planned activity and on-the-fly to support real-time changes. Your CMS ensures that you always publish the correct content across pages, locations, and channels whenever it's needed.

Assembling a Strong Team

Creating great customer experiences involves utilizing the right strategies, people, and technology. The team you choose to work on your personalization efforts is critical to its success. Both business and IT stakeholders from online and offline channels must work together.



TIP

Collaboration is one of the keys to successful personalization efforts. Make sure to involve all stakeholders at the start of your project and throughout its implementation. For example, setting shared KPIs across teams can encourage collaboration.

Getting buy-in from executives

It's crucial to get buy-in from executive-level sponsors. You need to make sure the people who control the direction of the company understand the value of personalization. You also want to have a designated “project owner” who will keep all departments apprised of ongoing progress. They can often act as a change agent, driving meaningful change in an organization.

Considering team members

Each team member plays a vital role in creating relevant experiences. Consider the purpose of each team member and what they want from technology:

- » **Marketing.** Marketers want to focus on quickly delivering successful campaigns. They create the strategy and design the experiences that will meet campaign goals and prove return on investment (ROI). *What they want:* They need technology to help them stay on brand, increase conversions, and improve customer loyalty. They must be able to publish content fast without relying on IT support.
- » **Creative team.** Creatives need to design assets that support all initiatives. They create the designs used for all brand efforts. *What they want:* They use technology to help them improve productivity and collaboration when creating engaging content. They also need to be able to locate the right assets when they need them, which includes rules for governance.
- » **IT.** The IT department makes sure the entire team has the technology it needs to deliver an exceptional experience across channels and devices effectively. IT wants to ensure that systems are stable, perform as required, and can be set up and maintained efficiently. *What they want:* They use technology to meet security and risk requirements. They also need the flexibility to innovate when new media or channels arise.
- » **Developers.** Developers build the experiences. They make the code changes and updates when back-end development is needed. *What they want:* They want to work faster (outdated systems often slow them down) and have the freedom to use their framework of choice.

» **Analytics and Optimization teams.** These teams take on the complex task of evaluating and extracting essential insights from the data collected. They use that data to optimize the customer experience. *What they want:* They use technology to create reports and analyze data to help evaluate, improve, and guide future campaigns. AI and ML make their job much easier.

IN THIS CHAPTER

- » Choosing which data to collect
- » Mapping the customer journey
- » Looking at a company success story

Chapter 3

Delivering Consistent and Meaningful Experiences Across Channels

Customers now demand a seamless experience that gets them the relevant content they need, when they need it, on any channel or device they are on. Delivering a personalized experience is critical to making your brand the one they turn to when it's time to buy. It's now the differentiator that matters the most.

This chapter shows you how to collect information about your customers and analyze the customer journey across all *touchpoints* (interactions) to deliver a great contextual experience.

Creating a Customer Profile

Great customer experiences start with the right data and the platform to collect and analyze that data. Right now, you likely have lots of important customer data. But it's stuck in silos and doesn't give you the unified customer profile you need to deliver personalized experiences. This section outlines the data you need to capture so you can build relevant experiences.

To be able to interact with customers on a “one-to-one” level, you need to collect all the data clues they leave for you on your website, landing pages, social media platforms, advertisements, campaigns, and transactions, as well as from second- and third-party data sources where possible. Here are the types of data that will help you build a unified customer profile:



TIP

» **Demographic data.** This data tells you *who* your customers are. It's the data you are probably most familiar with. It includes gender, age, income, and so on.

» **Psychographic data.** This data tells you about the *why* of customer preferences, their likes and dislikes, and values.

Psychographic data helps you present content that displays the right empathetic tone for your customer. It involves using the best colors and language that will suit a particular person.

» **Behavioral/interaction data.** This data tells you *what* customers do. It shows you how they interact with your brand touchpoints, which content they consume, and from where. This type would include historical data, drilling down to even asset-level performance.

» **Contextual data.** This data tells you *how, where, and when* your customers are interacting with you. This includes recognizing the devices they are using, the platforms and sites they are coming from, and their timeframe — month, year, and time of day. (For more about tracking and measuring data, see Chapter 4.)



TIP

According to Gartner (2021) (<https://www.gartner.com/en/newsroom/press-releases/-gartner-says-63--of-digital-marketing-leaders-still-struggle-wi>), 63% of digital marketing leaders still struggle with personalization and only 17% use AI and ML across the function.

Mapping the Customer Journey

Do you wonder why you should take the time to analyze and map a customer journey before you start? Wouldn't it be easier to create content, place it on several platforms, and see what happens?

Not really. Your entire team derives several benefits from thinking through the customer journey before you get started:

- » **As the team looks at a complete customer view, they gain insights into behaviors, desires, and preferences.** These insights can then be built into the content and experiences you create, making it more relevant, and delivering it at the right time and place from the start.
- » **When you evaluate touchpoints, you can see in context and in real-time what content would meet customer needs.** Doing this gives you the ability to look at the content as the customer would. You can see what matters most in that context.
- » **Mapping the customer journey lets you analyze the big picture of what you need regarding technology and budgets.** This information helps you prepare the resources you need upfront and reveals the full project scope.

Mapping a customer journey involves targeting all the potential touchpoints (both online and offline) that your customer has with your company on different channels, devices, and locations on their way to potentially buying your product or service.

The typical customer journey consists of the five stages shown in Figure 3-1.

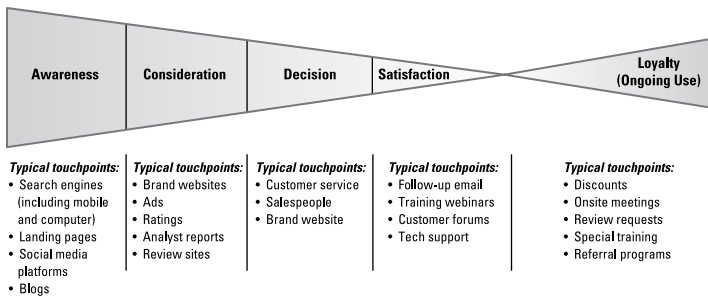


FIGURE 3-1: The modern five-stage customer journey.

- » **Awareness.** At this stage, the customer becomes aware of a want or need and begins to look for solutions.

Typical touchpoints: Search engines (including mobile and computer), landing pages, social media platforms, and blogs.

» **Consideration.** During this stage, the customer begins to narrow their choices and looks at specific options and prices.

Typical touchpoints: Brand websites, ads, ratings, analyst reports, and review sites.

» **Decision.** At this point, the customer looks at comparisons and makes a final decision to buy.

Typical touchpoints: Customer service, salesperson, and brand website.

» **Satisfaction.** This stage happens after the purchase. You want to make sure the customer is happy and doesn't experience buyer's remorse.

Typical touchpoints: Follow-up email, training webinars, customer forums, and tech support.

» **Loyalty (ongoing use).** At this stage, you want to encourage your satisfied customer to become a brand advocate.

Typical touchpoints: Discounts, onsite meetings, review requests, special training, and referral programs.



TIP

For more about how the customer journey is enhanced using AI and ML, see Chapter 5.



REMEMBER

You should continue to iterate once you've created the customer journey map. It can't remain static. As conditions change, you need to adjust accordingly.

Working Seamlessly Across Channels

The number of digital channels has never been greater. And as options have grown, so have consumer expectations. Consumers now expect to interact with brands on websites, mobile, social, IoT, voice, and so on, and have their experiences move seamlessly with them.

The key to providing an exceptional experience is an *omnichannel approach*. Previously, marketers used a *multichannel strategy*. They developed content for each channel but didn't ensure that the experience was cohesive when users moved from one channel or device to another. An omnichannel approach is now crucial for delivering personalized experiences in the moments that matter.

Using the right tools, such as a “headless” CMS (meaning the content is decoupled from the presentation layer), you can create content once and reuse it everywhere, delivering the same experience quickly and easily to any channel with a single push.

Recognizing Best Practices

If you are just getting started with personalization or want to improve what you are doing, here are seven best practices to consider:

- » **Meet customers where they are.** Customers have different needs. If you look at the devices they use, the channels they prefer, and their interests, you can tailor an experience that suits their preferences. The more relevant the experience, the more loyal they will be.
- » **Shorten the time to value.** Convenience and relevance are two critical factors for all customers. If you can quickly get them what they want, you become a valued brand. Learn what they want and make it easy to find, and you'll be rewarded.

Customers consider long wait times a sign of a poor experience. Optimize your website and other properties so that technology does the heavy lifting and takes the load off other channels.

- » **Let AI do the work you don't want to do.** The way to eliminate tedious work is to let AI automate manual tasks. Use software with built-in AI and ML to speed things up and produce better results.
- » **Help marketers and IT understand that they can move faster if they pull together.** You no longer have the option to wait until your project comes to the top of the IT department's to-do list. You need to utilize a CMS that lets marketing and IT departments work simultaneously on innovating experiences as well as editing, creating, and measuring content.
- » **Create one dynamic experience that flows freely across channels.** You can't determine the path your customer will take to interact with your brand. Be consistent and make sure your brand tells the same story across all the touch-points your customer will encounter. The right tools, like a headless CMS, enable you to converse with your customers



WARNING

no matter the device, location, or channels on which the information appears.

» **Let a modern workflow make you a success.** The never-ending need for new content and unique experiences means that if you don't have a streamlined workflow and improved velocity, you won't be able to scale to meet the demand.

Putting the right digital foundation in place allows you to quickly create on-brand content from templates, find and deploy the relevant assets, and publish them to any channel in real-time.

» **Use analytics to guide you in the right direction.** Using analytics to pinpoint things you can test or revise is critical to providing relevant experiences and meeting business goals. Chapter 4 discusses selecting KPIs. Continuously evaluate them and see what you can improve.



TIP

A SUCCESS STORY: INFORMATICA

Informatica is an Enterprise Cloud Data Management leader. However, the company struggled to harness website visitor data to deliver value from its insights across the corporate website. The website content and site experience were also static and rigid, and the publishing process was a time-consuming burden on IT. Informatica needed a platform that would allow its teams to understand their customers and quickly build and deliver dynamic content for the unique journey they were on.

They turned to Adobe's suite of products, including Adobe Experience Manager and Adobe Analytics, to create compelling, data-driven customer experiences. The results were significant:

- Traffic grew by 75x to its Platform entry page, with visitors spending 45% more time on page
- Bounce rates decreased from 63% to 32%

As a result, Informatica delivers large volumes of personalized content faster, saving marketing and IT teams' time and money to focus on higher-impact efforts.

- » Tracking your data
- » Utilizing analytics software
- » Looking at key performance indicators

Chapter 4

Using Data to Optimize Customer Experiences

Success in today's digital economy depends on how well you truly understand your customers. And if you want to deliver the relevant experiences they expect, on any channel they're on, you need intelligent systems in place. Ones that make it easy for you to transform insights into actions, and actions into incredible experiences.

Your data is an asset that continues to increase in value as new channels and media become available. You must consider all the ways you can invest in your data to give your company a competitive edge. A powerful marketing analytics solution can be a force multiplier that enables your brand to be more effective in everything it does.

This chapter looks at evaluating KPIs. You also see what you need analytics software to do to optimize your data to deliver compelling and personalized customer experiences.

Utilizing Analytics Across the Enterprise

The best personalized experience is the one that is invisible to customers. The experience you deliver is only as good as the data you collect and the tools you use to analyze it.

Looking at analytics software

Every company is on a different trajectory when it comes to using its data effectively. Legacy systems and disparate data can make it difficult for you to use all the data you have effectively. To do so, you need analytics software that will enable you to:

- » **Unify siloed data from all the sources** (online and off) to collect and standardize the data. Doing this allows disparate formats (both structured and unstructured) to be brought together. Then, all the data trapped in silos becomes usable across the company.
- » **Extract insights and make recommendations** using AI and ML to quickly optimize experiences at scale. The analytics software can compare data sets and “what if” scenarios to recommend the right experience for each customer. For more on AI and ML, see Chapter 5.
- » **Provide flexible reporting** that allows users to understand and analyze their audiences and engagement for personalization.
- » **Use automation to act efficiently** on the insights you uncover. For example, you can use anomaly detection to automatically detect significant anomalies and identify root causes so you can separate the signal from the noise.
- » **Test and deliver improved personalized experiences** at scale to optimize campaigns in real-time across all interactions.
- » **Use lookalike modeling** with ML to identify new audiences. It helps you use the data you have to find those with similar traits, thus expanding your reach.



REMEMBER

Check to see whether the analytics solution you are considering can be integrated with other data sources like your customer relationship management (CRM) system. Your software should accommodate all the other tools in your tech stack.

Tracking the right data

To know whether you are successfully delivering the right personalized experience and meeting your business goals, you need to establish metrics upfront that will indicate whether your efforts are successful or not. If you have done a good job of selecting these KPIs, you can spot mistakes and change course quickly.

Be sure that you have integrated all your data from disparate sources as shown in Figure 4-1, so that no insight is left behind.



FIGURE 4-1: Tracking all your data sources.

Sources include: CRM data, ad impression data, campaign data, point-of-sale (POS) and commerce data, third-party data (databases collected from other entities), second-party data (including social platforms), behavioral data, product usage data, and voice of customer data.

Evaluating Your KPIs

So, what exactly are KPIs? They are the performance metrics that you want to track to reach your business goals. Over time they help you determine such things as whether:

- » Your investment in technology that delivers the right personalized experiences is paying off.
- » Your business decisions are based on real evidence instead of gut instinct.
- » All your departments are working together to achieve a common goal rather than working in silos.



REMEMBER

KPIs should be agreed upon across teams and always align with corporate objectives.



TIP

Once you have assembled all your KPIs, find out if you are already tracking them. Also, make sure to benchmark all your KPIs to know from where you are starting.

Marketing KPIs

Typical KPIs related to marketing often include:

- » Faster time to market
- » Growth of sales revenue
- » Increase in leads and conversion rates
- » Increase in upsells and cross-sells
- » Increase in customer engagement
- » Improved retention and customer loyalty

IT KPIs

KPIs related to IT include:

- » Total cost of ownership
- » Faster time to market of new experiences
- » Lower maintenance and development costs
- » Team efficiency metrics

Every company has different business goals and its own set of KPIs, but consider using these as a starting point.

- » Understanding the value of cloud-native
- » Utilizing AI and ML to gain insights
- » Looking at three types of intelligence

Chapter **5**

Scaling Up with the Cloud and AI

Delivering personalized experiences at scale is critical to business growth. Scalability should be a key part of any personalization platform you choose. Depending on the size of your personalization efforts, you might be dealing with a complex set of locations, platforms, and personas. For this reason, it's important that you put in place the right technology to support the variety of contextual experiences you need to deliver.

This chapter looks at using the cloud to scale your personalization efforts and see how the use of AI and ML can help you extract valuable insights from your data to deliver an omnichannel experience.

Understanding the Value of Cloud-native

While many vendors may claim to support the cloud, truly cloud-native solutions can be uncovered by how well they support scalability, interoperability, and deliver consistent innovation. Here are some of the benefits of using cloud software for personalization:

- » **Always current.** To stay ahead of the rapidly evolving customer trends, you need access to the latest customer experience (CX) innovations. With a cloud-native solution, your teams always have the latest software, so you can focus on strategic initiatives instead of resource-intensive product upgrades.
- » **Modular and global.** As brands look to create compelling experiences at scale, creatives and marketers are being tasked with generating large volumes of content. Producing and managing content at a high velocity requires service-based architecture combined with the scalability of the cloud to meet enterprise needs.
- » **Performance and resiliency.** In this hyperconnected digital economy, consumers won't stand for poor experiences. Cloud-native software can power resilient and performant personalized experiences. Be sure to select a cloud solution with autoscaling that ensures performance for the visitor and marketer and has a managed content delivery network (CDN).
- » **Secure by default.** To engage customers with personalized content, trust is a requirement. Cyber-resilient brands need a solution that stays ahead of emerging threats with no additional overhead. Look for things like built-in redundancy, regular backups, and complete network, data, and physical security.

Getting to Personalization at Scale

Most brands acknowledge that you need to be able to meet demand by having the ability to scale. However, brands should keep several things in mind when scaling up their personalization efforts. Here are some issues to consider:

- » **Utilizing data.** When you scale up, siloed data is a problem. With siloed data and siloed content, it's difficult for everyone to find the information they need, and you don't get a true picture of your customers and the state of your business. Rather than just trying to amass more and more data, carefully determine what your most important metrics are and if they paint the whole picture. Then assess whether the data is siloed or incomplete.

- » **Maintaining privacy and security.** Not all data is created equal. Customers have the right to keep sensitive information like medical details out of a company database. They also expect that brands will protect the security of their data.
- » **Scaling content.** Even with all your data unified and all your segmentation and profiles created, you need to be able to create content variations at scale to support different audiences. You need reusable ways to repurpose pieces of content for different channels and devices.
- » **Optimizing design.** Make sure that your software has created atomized content that is broken into smaller entities that can be mixed and matched as needed. (For more on atomized content, see Chapter 2.)
- » **Deciding on actions.** Rather than relying only on typical holiday and other promotions, you also want to be able to create experiences that are triggered by specific customer actions.
- » **Testing to revise and improve.** When conducting tests, ensure that you can deliver the right data to the right people at scale.

Developing Insights Using AI and ML

As discussed in Chapter 3, mapping the customer journey is critical to the success of your personalized experiences. The content you create for the journey is based on several variables like the stage the user is in, which device they are using, and from where they were referred (touchpoints like other websites, social media platforms, and so on). To process the millions of variables that are created, your analytics solution must be able to use AI and ML to see patterns and make recommendations.



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What do these tools do? AI and its subset ML let computers take actions they haven't been programmed to do. In effect, the program "learns" on its own. It is perfect for analyzing large data sets, grouping segments, finding trends, delivering conversational responses (through chatbots), and creating personalized experiences.

What makes these tools so valuable? Millions of pieces of data are extracted across the customer journey. Because of the complex

nature of the data, it is impossible for humans to manually evaluate and make predictions about the potential offers and experiences each customer could receive in real-time. That's where AI and ML come in. These tools allow you to analyze all the data created at each touchpoint, extract valuable insights, and act on those insights to deliver personalized experiences in context for each individual.



REMEMBER

Using an integrated platform as your digital foundation ensures that the insights you get from AI and ML can be scaled up across all your channels to improve interactions in real-time.

Getting What You Need from AI and ML

AI has been hailed as a revolutionary technology because it allows people to focus on essential tasks while relegating the data crunching to computers. To get the most from AI, make sure to deploy technology that analyzes three types of intelligence:

- » **Content intelligence.** The technology you use should give you the ability to structure content in the right way for different channels, but also understand what's in that content and what the context is. It should also help you figure out why certain content performs better than others on a more granular level.
- » **Creative intelligence.** Your technology must be able to understand how to interpret images, illustrations, and other creative assets to create even more advanced experiences such as animations and 3D designs.
- » **Experience intelligence.** The technology you use must be able to deliver personalized experiences in real-time and make recommendations. For example, based on your behaviors, interests, and occupation, you can be shown a sale on tall ladders that are meant for outdoor use versus ladders for inside the home.

- » Acknowledging privacy concerns
- » Delivering omnichannel experiences
- » Extracting data insights

Chapter 6

Ten Personalization Challenges and How to Address Them

Most brands understand the need for great personalized experiences, but many have trouble putting it into practice. Here are ten common challenges and what brands can do about them:

- » **Understanding customers' needs.** Companies have always struggled to find out everything they can about their customers' needs and desires. Analytics software makes it possible for companies to understand what their customers really want without having to guess. This drives personalization.
- » **Dealing with the exploding demand for content.** To support the ever-growing need for new content, brands need to find more efficient ways to develop and manage it. Software that can use AI to repurpose content and create more efficient workflows can help meet this demand.
- » **Dealing with a culture that is slow to adopt change.** Corporate culture has always had a significant impact on

how brands can transform themselves into data-driven enterprises. The right organization and alignment of teams and training can help organizations implement personalization by helping them collaborate and be more efficient.

- » **Dealing with data regulations and compliance.** Data restrictions, as indicated by the General Data Protection Regulation (GDPR) and other compliance rules, make it important for brands to ensure they are not violating privacy laws. You need a system that makes sure you're up to date and compliant.
- » **Delivering consistent omnichannel experiences.** Brands find it challenging to deliver consistent experiences across all channels. To address this issue, you need software that can identify the user across channels and adapt the experience based on the user's behavior on each channel.
- » **Scaling across emerging channels and new media.** To deliver a cohesive experience across channels now and in the future, you need a future-proof CMS that can grow with you. One that ensures the content for each channel automatically adjusts to the formatting requirements. If you atomize your content (break it into single small chunks) and use the right platform, like a headless CMS, to manage it, you can be ready for any new channels that come along.
- » **Understanding how to measure customer data for insights.** Many brands have difficulty extracting insights from the massive amounts of data they have trapped in silos. The use of powerful tools like AI and ML can analyze the data and make personalized recommendations in real-time.
- » **Acting on insights to optimize results.** Many companies not only find it challenging to bring siloed data together to create a unified customer profile, they also find it hard to act on the insights they have. Software that permits testing and making changes in real-time by surfacing winning experiences helps companies take the actions they want without requiring IT support.
- » **Respecting privacy boundaries.** Brands can find it hard to walk the fine line between sending a personalized message that resonates versus that message feeling invasive. To address that, think about how you phrase the message you're sending. Make customers feel secure in the

knowledge that there are boundaries you won't cross, and that their data is secure with your organization.

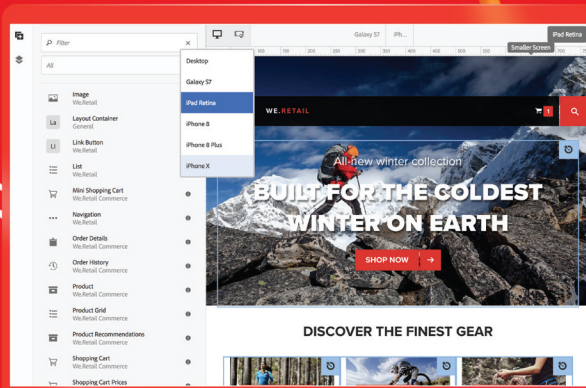
- » **Unclear where to start.** Personalization can be overwhelming and it can often be unclear where to start and what the path is towards value realization. Following the steps in this guide will help you navigate your personalization journey.

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Deliver personalized experiences at scale

Welcome to the future, where customers expect better, faster, and more innovative experiences than ever before. To bridge the gap between their expectations and what you can provide, you need to do more than just know your customers — you need to build and deliver customized experiences no matter where they are. This book is your guide to building a digital foundation that delivers personalized experiences at scale.

Inside...

- Understand why personalization matters
- Create and manage digital assets
- Deliver consistent and meaningful experiences
- Deploy content across channels
- Track data and measure success
- Gain insights through artificial intelligence and machine learning

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