



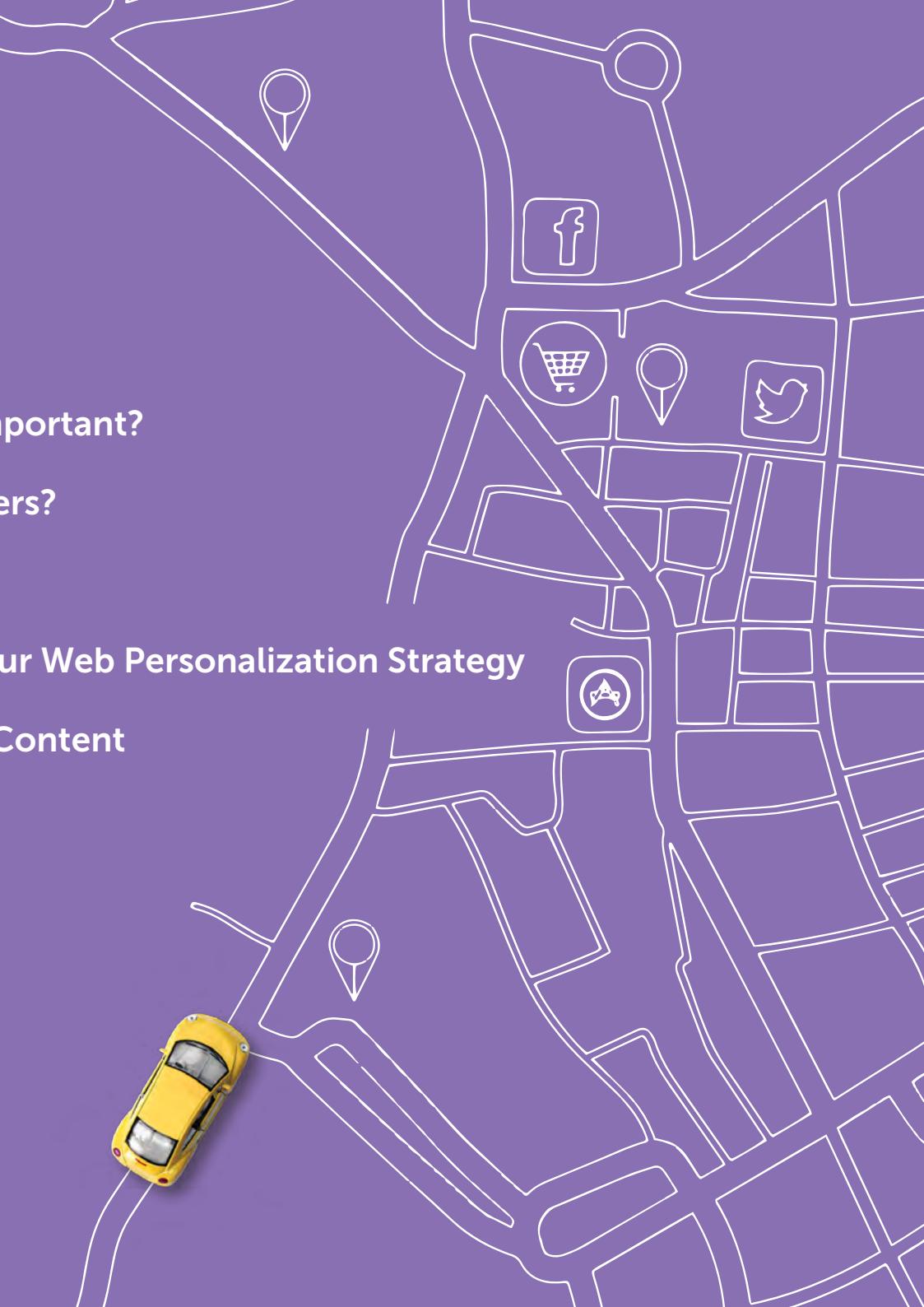
THE DEFINITIVE GUIDE TO **WEB PERSONALIZATION**

Everyone is one in a million

 **Marketo**[®]

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Introduction

WHY SHOULD I READ THE DEFINITIVE GUIDE TO WEB PERSONALIZATION?

Today, web personalization is a mission-critical marketing activity that creates a more meaningful experience for your customers and also generates better business results. How? This guide will explore that question and more.

First, let's start with an example that illustrates why web personalization is a critical component of your marketing activities:

As a marketer, chances are you are not sending the same exact email to your entire database, even if it is well tested and delivers results. Your database is comprised of multiple segments and different types of customers. Some people may be very new to your

product or service, while others are long-standing customers, so sending the same communication, offer, or content piece to all of these folks is not effective.

But most marketers are doing just that, *daily*, on their website. They offer the exact same experience to every visitor, every time, regardless of their behavior or attributes. And each month, they do it tens of thousands of times

(sometimes much more)—as active prospects and customers visit their site. So, while marketers understand how detrimental a cookie-cutter, repetitive experience is on email—often that thinking doesn't extend to their websites. And that's a mistake when you think about how much of their interested audience they alienate every day by skipping the chance to speak to them as individuals on their website.

For a marketer whose marketing activities drive toward key metrics—conversion, engagement, and increased lead generation or order value—failing to utilize your website in the most effective way possible has a measurable impact. This is

because your website is the hub of your marketing activities and web personalization is proven to make that hub (and all your investments that drive your audience to it and keep them there—from paid ads to content, etc.) much more effective. In fact, a recent report by VB Insight found that 87% of companies see a lift in key metrics (such as conversion rates, engagement rates, and lead generation or average order value) when they employ personalization. Within that group, 40% see an uplift of more than 20% in their key metrics. Missing the opportunity to truly connect with your buyer ultimately means lost revenue, yet fewer than 20% take advantage of web personalization to improve their results.



Introduction

WHY SHOULD I READ THE DEFINITIVE GUIDE TO WEB PERSONALIZATION?

This fact is compounded by today's consumer expectation of instant gratification and a wherever/whenever dimension to every aspect of their online experience. Now, more than ever, they are better informed, more selective, and quicker to say no. Each day, they are bombarded with new marketing messages, so only the most targeted and relevant messages earn their attention. If your website doesn't immediately address a buyer's needs, they will bounce and seek products or information from somewhere else.

So how do you create a website that accelerates engagement, conversion, and retention for your prospects and customers, and creates a more relevant experience for your buyer? Just like you would not send the same email to your entire database, you do not want one, generic message on your website. To be effective and relevant for every individual or segment in your audience, you need multiple, personalized messages.

Web personalization is a critical component of your marketing—from creating a great customer experience to driving better conversions. The goal of The Definitive Guide to Web Personalization is to provide a thorough overview of the web personalization landscape for marketers at all levels. It is meant to be an actionable guide, so you can learn how to create a personalization framework for engaging your audience more effectively—specifically on your website.

This guide was created for all marketers who use, or are considering using, personalization on their website and across their web channels (which should be all of you!) It is split into nine sections created to help you understand the ins and outs of web personalization.



Introduction IN BRIEF

In this guide, you will learn:

1. What Web Personalization Is:

This section defines web personalization and how you can use it to create a dynamic, relevant web experience for your buyers.

2. How Web Personalization Helps Marketers:

Web personalization helps marketers move the needle by enabling them to deliver a continuous, personal experience to individual visitors at scale. Personalized experiences result in increased brand preference and loyalty, improved conversion rates, and ultimately an uplift in sales.

3. How to Create a Web Personalization Strategy:

This section will walk you through how web personalization fits with

your overall marketing goals, your customers' journey, how to define web personalization goals, examines use cases, and helps you identify early metrics to track.

4. How Web Personalization Fits with Your Cross-Channel Marketing:

Marketing channels don't operate in silos. This section examines how web personalization complements your existing campaigns across other marketing channels to create a seamless user experience.

5. How to Select the Right Message:

Content is the key to communicating with your audience, and it's a critical component of web personalization. This section examines how to choose and create the right content for your web personalization activities and where to serve it on your site.

6. Testing & Optimization:

In order to improve your web personalization activities over time, you need to run tests and iterate. This section explores how to structure your testing and highlights areas for improvement over time.

7. How to Measure Your Web Personalization Activities:

Metrics provide the feedback you need to understand the success of your web personalization activities. This section examines the different metrics you can use to measure success from engagement to conversion.

8. What People You Need to Run Web Personalization:

Like any marketing channel, web personalization requires resources to run it. This section explores how to structure your resources to run web personalization effectively, regardless of your team size.

9. About Web Personalization Tools:

Technology makes running web personalization possible. This section highlights technology that supports and integrates with web personalization tools to make it more effective.

Use this guide to help you get started, take your web personalization to the next level, and drive revenue. Mark it up, share it, and let us know what you think.



WHAT IS WEB PERSONALIZATION AND WHY IS IT IMPORTANT?



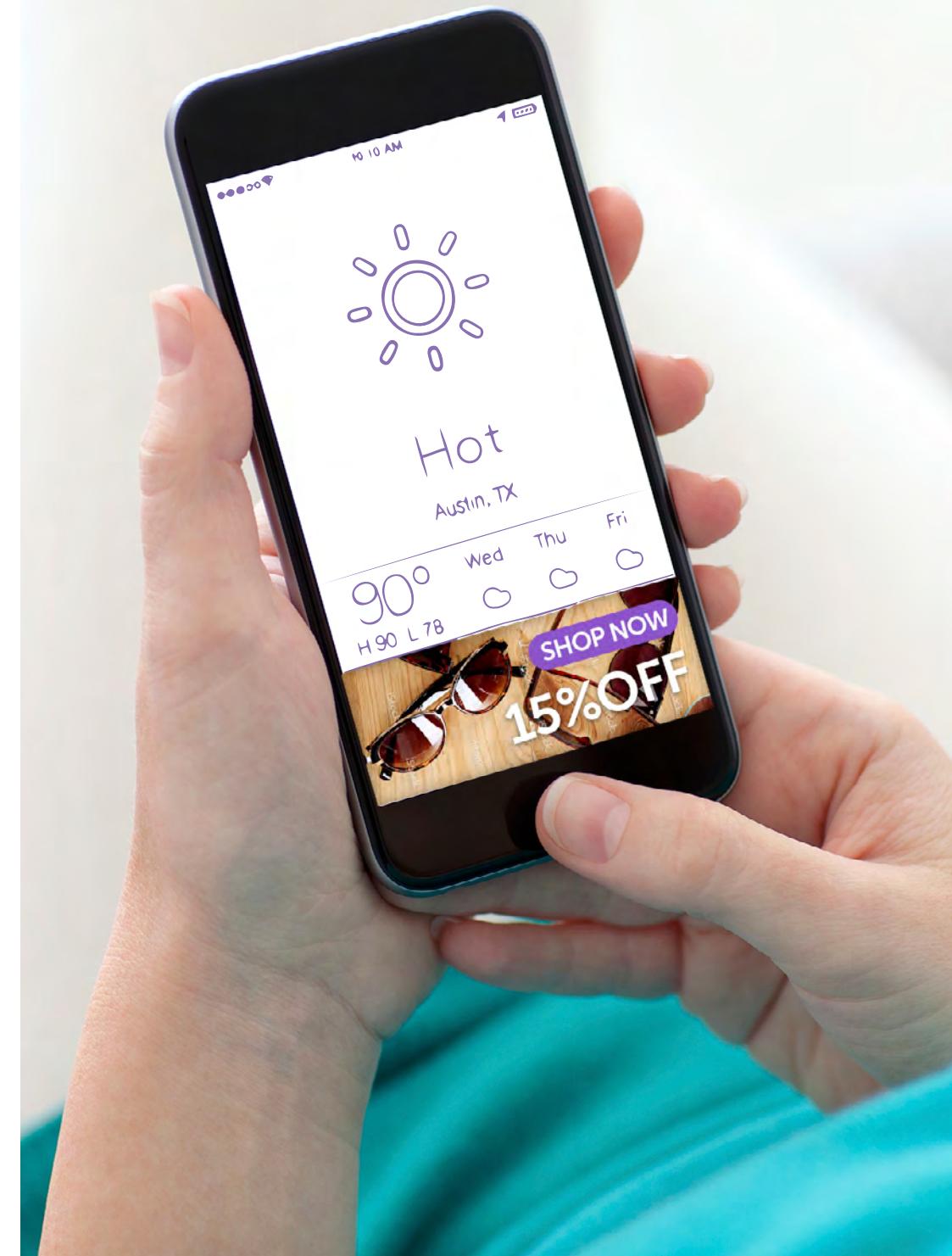
What Is Web Personalization and Why Is It Important?

DEFINING WEB PERSONALIZATION

The term “web personalization,” which we’ll use throughout this guide, refers to creating a dynamically personalized, highly relevant website experience for your prospects and customers based on their behavior, location, profile, and other attributes. Web personalization means understanding and meeting your buyers’ interests, tailoring your website to fit their profile, and ultimately providing the best message, content, or offer—one that is specifically relevant to them.

Web personalization delivers a personal and relevant experience to your visitors based on who they are and what they do—whether that visitor is an anonymous visitor, a known contact, or a loyal customer. It focuses primarily on your company’s website because it serves as the activity hub and “home base” for all web channel activities and is the main interaction channel between your company and your customers, especially when it comes to driving conversion. In fact, according to a DemandGen report, 70% of buyers have indicated that a vendor’s website was the most influential channel in making a purchase decision.

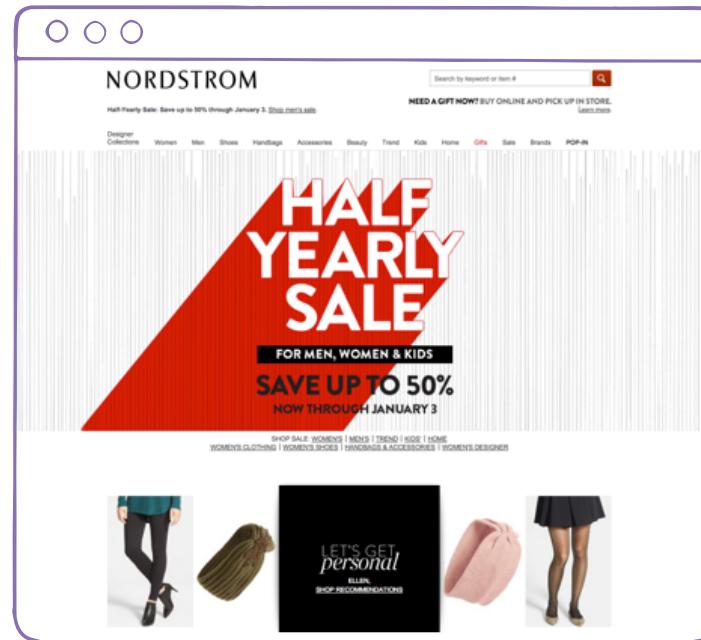
As a consumer yourself, you have probably encountered web personalization before. Have you ever clicked through recommendations on Netflix or Amazon based on your previous selections and reviews? These are both common examples of personalization. Think about the convenience of having the product or information you need shown to you immediately upon visiting a website. Now, on the contrary, think about a website that forces you to comb through menus and pages to find what you need. Which experience do you prefer? Which gets your business?



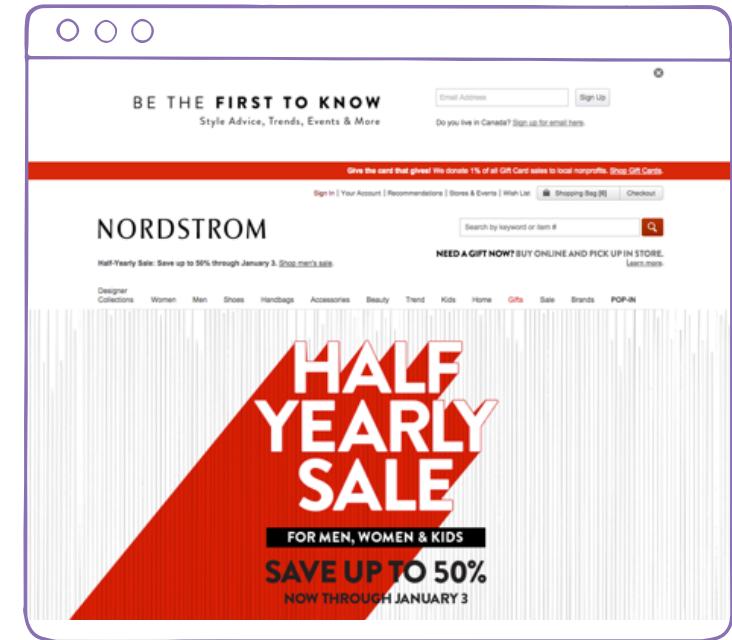
What Is Web Personalization and Why Is It Important?

DEFINING WEB PERSONALIZATION

Now, let's look at a couple of examples of personalization from different types of businesses. In the first example, you can see the difference between a Nordstrom homepage that's personalized based on a user's past purchases and searches, like tights and headwarmers, versus the same area of the page that is not personalized.

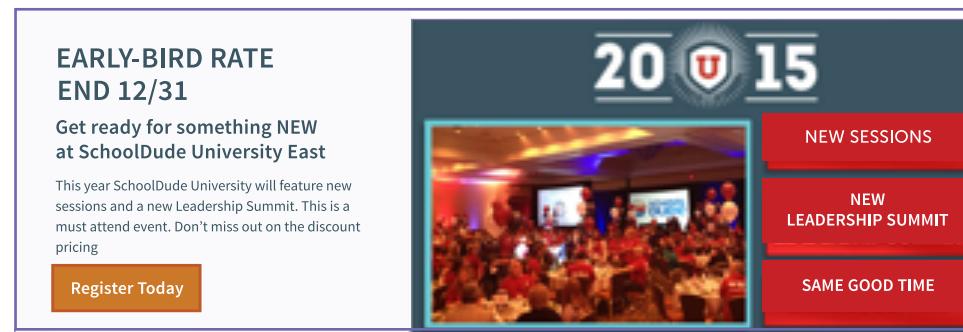


Homepage with personalized recommendations



Homepage without personalized recommendations

And then in the second example, you can see how a B2B business uses web personalization to target visitors by location. In the image, you can see the personalization that occurs once a web personalization tool 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

What Is Web Personalization and Why Is It Important?

DEFINING WEB PERSONALIZATION

WHO USES WEB PERSONALIZATION?

Because of the complexity and traffic volume of some websites, marketers sometimes assume that personalization is complicated or time-consuming and therefore only for organizations with big teams or big budgets. But, with the right tools in place, personalization can be a

simple process for all marketers that can drastically increase the efficacy of your website and cross-channel marketing programs, regardless of your organization's size or business type. In many cases, the return on investment (ROI) for web personalization, even with limited resources, is higher than other, more traditional, marketing programs.

WEB PERSONALIZATION IN REAL-TIME

Effective web personalization makes real-time changes to your website based on the attributes of the visitor. These changes that occur in milliseconds deliver a personal experience to your visitor at the exact moment that they are on your site.



What Is Web Personalization and Why Is It Important?

WHY IS WEB PERSONALIZATION IMPORTANT?

Marketers use web personalization primarily to make their website more effective at engaging, converting, and retaining prospects and customers. Whether or not today's buyer is aware of the personalization that occurs on your website, a personalized experience can make a significant difference in the "stickiness" and success of your site.

According to research from MyBuys, 40% of consumers buy more from retailers who personalize their shopping experience across channels. In fact, according to Marketo data, visitors presented with personalized content convert five times more than the average visitor.

Additionally, buyers whether online or offline, expect marketers to listen and respond to them and their activities with personal and relevant messages.

PERSONALIZATION: AN EXPECTATION, NOT AN EXCEPTION

According to a study by eMarketer, more than 85% of internet users specifically expect and accept personalization as a part of their online retail experience. And 83% of B2B buyers say company websites are the most popular channel for their online research.

In fact, as a marketer, implementing web personalization is the single most impactful activity that you can start today.

While this personalized experience stretches beyond the web, your website serves as a hub for many different kinds of web activity because most online channels ultimately lead your buyer back to it. This is because your website is purpose-built to engage buyers and accelerate their movement through their unique buyers' journey.



What Is Web Personalization and Why Is It Important?

WHY IS WEB PERSONALIZATION IMPORTANT?



PERSONALIZATION: AN EXPECTATION, NOT AN EXCEPTION (continued)

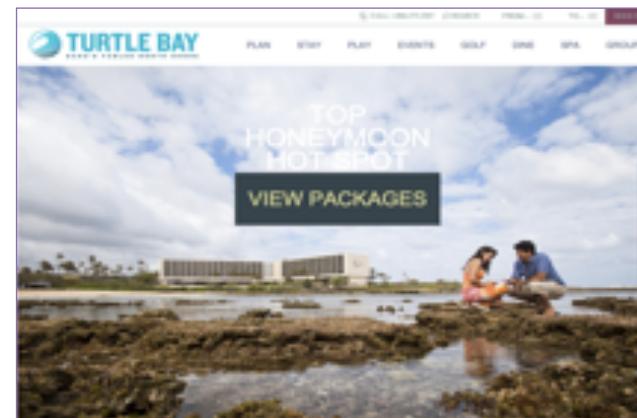
For example, if a person visits your website and you implemented web personalization, you could:

1. Identify the visitor's attributes (like buying intent, behavior, persona, geo-location, firmographics, etc.)
2. Based on those attributes, present them with the most relevant copy, imagery, offers, and calls-to-action, which create a uniquely customized experience for your visitor.

In the examples below from Turtle Bay, you can see that they use web personalization to present different messages to their visitors based on their previous activities—like searches. Their homepage uses a web personalization tool that enables it to adapt to the interests and behavior of their visitors based on the search term they used when entering the site, such as someone looking for a golf resort versus someone looking for a honeymoon trip (so that the first page they visit on the site is 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 that give the marketer more insight into the organization or company associated with a visitor. In B2B organizations, this can be very helpful in understanding if your target audience is visiting your website and can also help you identify types of companies to go after. Firmographics include:

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

What Is Web Personalization and Why Is It Important?

WHY IS WEB PERSONALIZATION IMPORTANT?

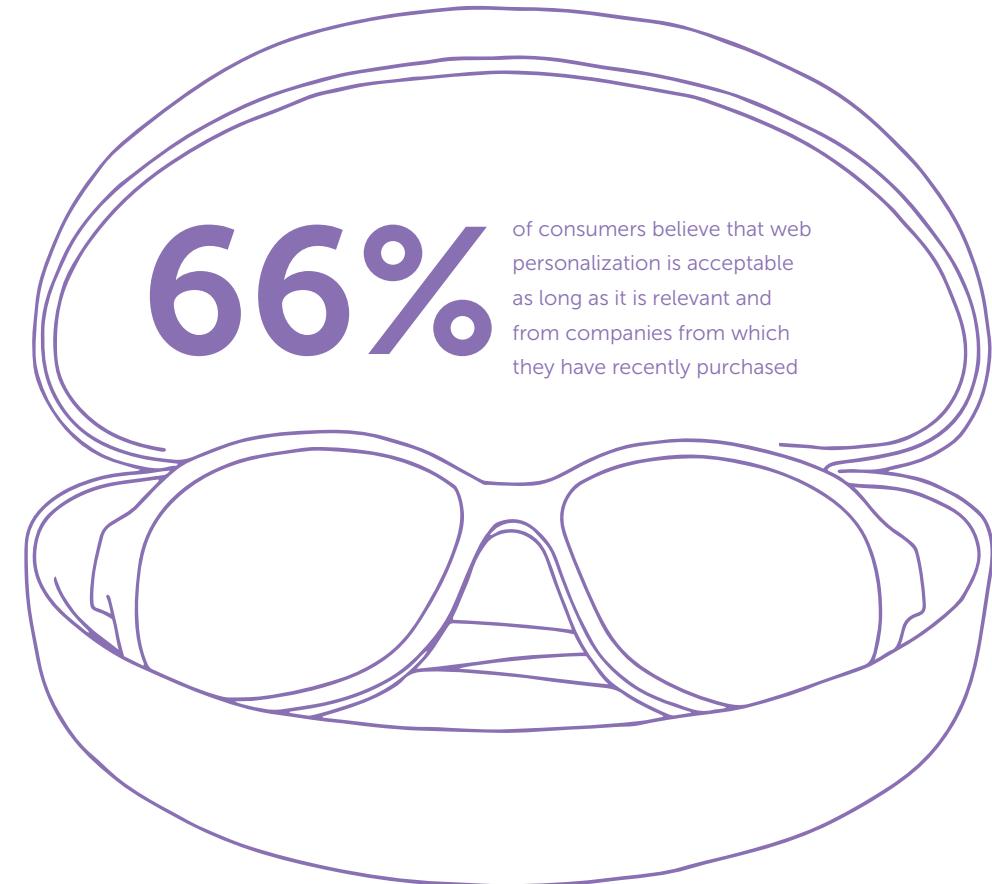
THE CONSEQUENCES OF BEING IMPERSONAL

On the other hand, failing to personalize your website can create a disconnect between you and your customer that results in missed opportunities. According to Janrain and Harris Interactive, nearly three-fourths (75%) of online consumers get frustrated with websites when content (e.g. offers, ads, and promotions) appears that has nothing to do with their interests. If you translate personalization into a real-world scenario of a social interaction, it highlights how important the ability to listen and respond personally is.

For example, imagine that 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 plans for the rest of the weekend. Now, if you see that person the next day, and he reintroduces himself to you as if you never met before—how would that feel?

Being able to pick up a conversation where you left off or incorporate details you already know about a person—whether it's part of a social interaction or an interaction with your buyer—is an important part of building a relationship. In fact, according to a study by Magnetic and Retail TouchPoints, the most important element of a shopping journey is an easy and relevant online experience. Therefore, every interaction should serve as a foundation that fuels and informs your next communication—and to do that, marketers should consider web personalization.



HOW DOES WEB PERSONALIZATION HELP MARKETERS?



How Does Web Personalization Help Marketers?

ENGAGING THE NEW DIGITAL BUYER

Web personalization helps marketers move the needle by enabling them to deliver a continuous, personal experience to individual visitors or target audiences at scale. Personalized experiences result in higher engagement rates, increased brand preference and loyalty, improved conversion rates, and an uplift in sales.

In earlier sections, we covered why web personalization is important for marketers seeking to engage, convert, and retain their visitors and the expectation of personalization from today's digital buyer—but to truly engage your buyers, you need to capture their attention in a meaningful way and, if possible, do it before anyone else.



How Does Web Personalization Help Marketers?

ENGAGING THE NEW DIGITAL BUYER

ENGAGE MORE PEOPLE

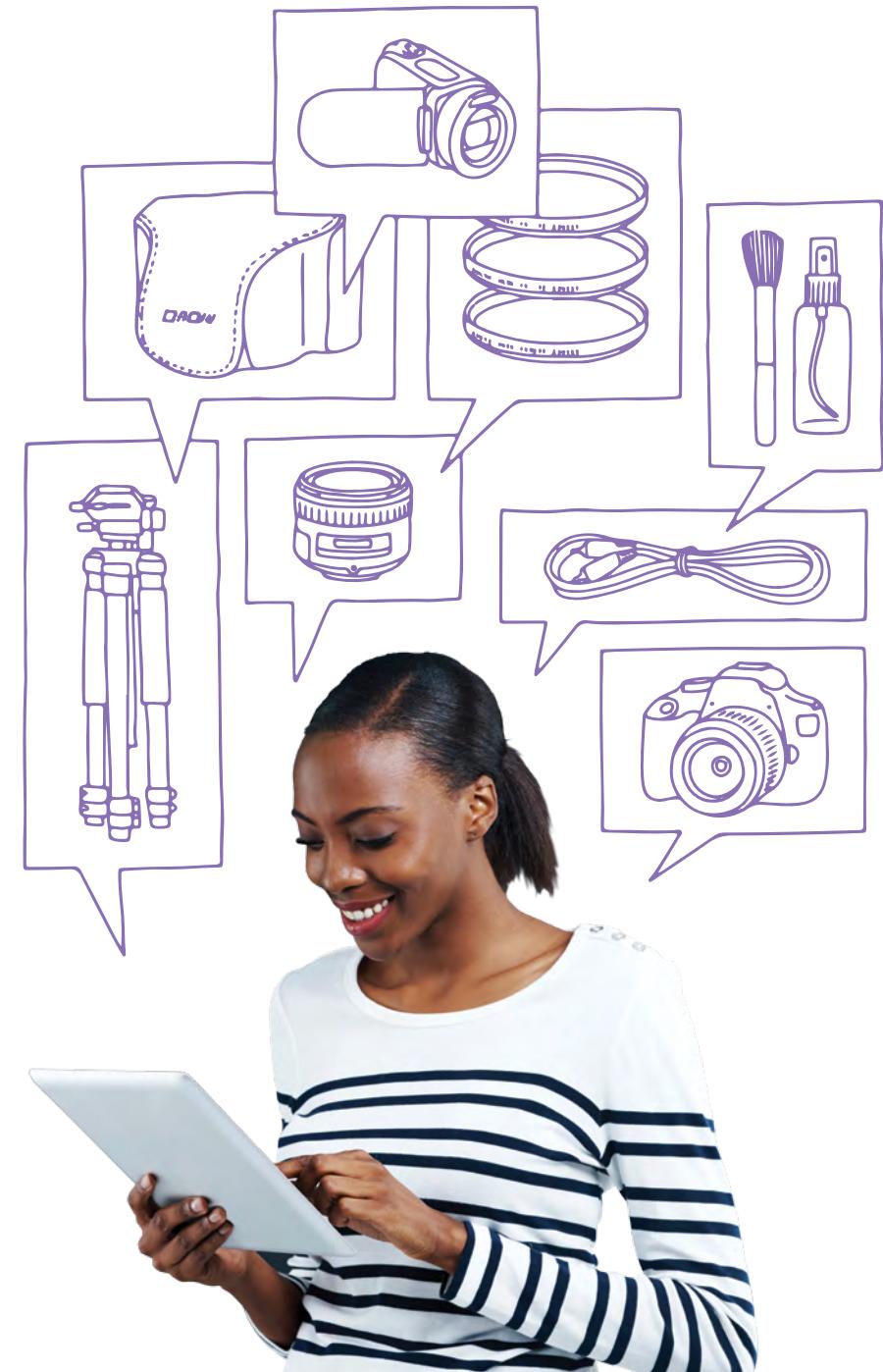
Every day, your website handles a huge volume of visitors. These visitors may arrive at your website organically, but more likely they arrive because you drove them there through paid programs (pay-per-click, social advertising, etc.). Almost every company—from startups to small-to-medium businesses (SMBs) to enterprises—has thousands of visitors on their site every month. In many cases, this number is actually in the tens or hundreds of thousands a month (and sometimes in the millions). This is a critical opportunity to engage visitors and convert them in a more efficient manner. But marketers are missing out on this huge potential by offering these visitors a website that lacks personalization.

If you think of web personalization as a way to capture the attention of more people visiting your site and draw them in, you can see that it makes perfect business sense. According to data from Rocket Fuel, the average bounce rate for a website is 55%. That means more

than half of the people that visit your site leave almost as soon as they enter. Capturing even a few more percentage points of your traffic with a personalized message translates into real dollars.

Most businesses have different audiences (or segments), and those audiences expect to be spoken to in a specific way, with an understanding of who they are and what they want. If you have ever worked on a website redesign (or even initial design), you know the pain of deciding what to put on the homepage and that creating messages that serve everyone can end up serving no one. With personalization, your website adapts to the needs of these segments automatically and helps you avoid this problem. It also enables you to test which message is the most effective for a particular segment in a way that is scalable and delivered in real-time.

Even companies that cater to only one audience can benefit from treating customers differently than new visitors and engaging different parts of their customer base differently.



How Does Web Personalization Help Marketers?

ENGAGING THE NEW DIGITAL BUYER

STAY AHEAD OF THE COMPETITION WITH THE RIGHT MESSAGE

If you do not personalize your website, your visitor will not see the best message you have for them and may not spend the time to find it. You then risk the chance of another company capturing the attention of your buyer and actually showing them what they were looking for. According to a study by GE Capital Retail Bank, over 80% of consumers do their own research online before buying and only the most

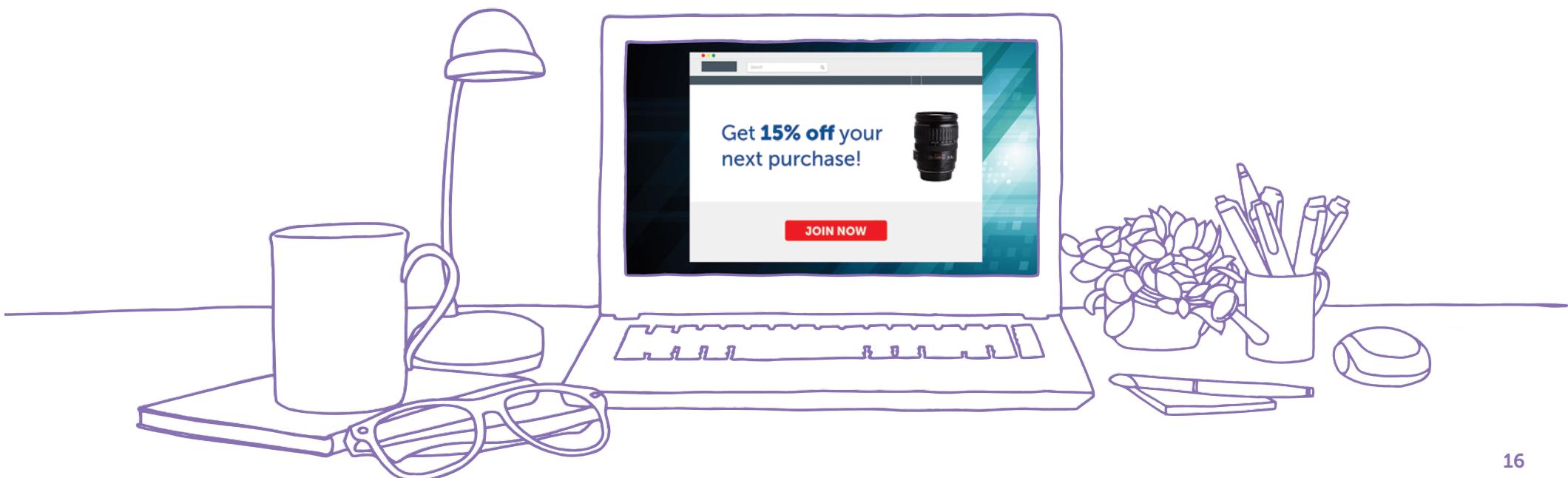
compelling message and offer will win. You invest a great deal to drive consumers to your website, so make sure that once they get there you offer them a relevant experience.

But your efforts shouldn't be focused on just the awareness-building stage of the customer lifecycle. Marketers need to be vigilant to engage their customers in a personal way throughout the entire customer journey. After all, your prospects and customers will continue to come

back to your website over and over throughout their relationship with you. So your messages need to evolve as your relationship grows and their needs change.

Whether you are marketing to businesses or consumers, web personalization enables you to create meaningful, real-time interactions with your audience by dynamically engaging them with the most relevant offer, content, and imagery that you have.

Using tools like Marketo Web Personalization, you can create tailored website experiences in real-time for each unique visitor that adapt and change 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.



How Does Web Personalization Help Marketers?

THE BENEFITS OF WEB PERSONALIZATION

Web personalization helps marketers address their customers in a personal and relevant way online and throughout their lifetime, while also enabling marketers to reach their goals faster.

There are seven key ways web personalization helps marketers:

1. Build Brand Preference:

Your website is a critical component in your cross-channel marketing effort to build brand preference and customer loyalty. You can use web personalization to strengthen how a visitor feels about you online and offline. For instance, you can use what you know about an individual (gathered from their interaction with

your website) to tailor the messages you send on other channels and create content that resonates with them—making your marketing more personal and effective across the board.

2. Understand Visitors:

Web personalization helps marketers understand the personas, demographics, and behavioral and firmographic data that represents your target audience and is most likely to result in conversion. This understanding is critical because it gives you an opportunity to

then identify the messages, content, offers, and products the buyer prefers. By giving marketers insight into what types of visitors and offers lead to higher conversion, you are able to focus your marketing resources on implementing and testing activities that generate real revenue.



How Does Web Personalization Help Marketers?

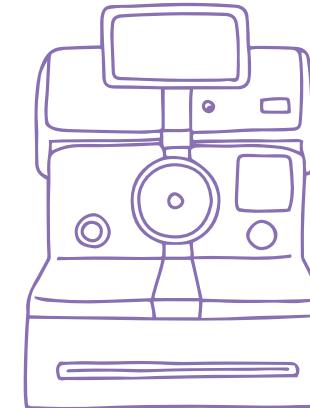
THE BENEFITS OF WEB PERSONALIZATION

3. Convert Visitors:

While many of your marketing efforts bring visitors to your site, the majority of those visitors—a whopping 98%—are anonymous when they arrive and remain so after they leave. For example, that means if you have 300,000 visitors on your site every month, 294,400 of them are anonymous. And that's a lot of missed potential! Web personalization helps marketers track demographic and behavioral data, and unmask, engage, and convert prospective customers as they arrive on your site.

Personalization helps increase conversions by offering visitors personalized recommendations, which, according to data from Echidna, typically converts visitors 353% more frequently than visitors who do not see or engage with personalized recommendations. In fact, personalization pioneer Amazon's analytical approach to personalization has led them to making \$543 in revenue per customer, the highest among online retailers.

Web personalization also supports account-based marketing (ABM). ABM is a B2B marketing strategy that targets a specific group of accounts or customers based on pre-defined attributes. This method of targeting is aided significantly by web personalization, which identifies target accounts from anonymous visitors based on IP addresses, or known visitors, of email domains and offers those visitors a personalized experience (at an account or even individual decision-maker level), leading to increased engagement and conversion. This is especially important for brands targeting millennials (a generation that makes up more than 25% of the U.S. population and will have a spending power of \$200 billion annually by 2017), because millennials expect personalization. In fact, more than 50% of them go out of their way to buy from brands they care about, according to research from Barkley.



98%

of visitors are anonymous and remain so when they leave

*that's a lot of
missed potential*

WHAT IS AN IP ADDRESS?

Internet Protocol address, also known as IP address, is a numerical label or address assigned to each device (think iPad, iPhone, laptop, and network printers) that participates in a computer network. It serves as a means of identification for each device, sharing its general location.

SPOTLIGHT

A MATCH MADE IN HEAVEN: ACCOUNT-BASED MARKETING AND WEB PERSONALIZATION

ABM is a strategic approach to lead generation in which your time and resources go into targeting a key group of specific accounts. By employing an ABM strategy, you can target and personalize for specific companies or industries with the assistance of your web personalization platform. For instance, you could focus on a few of the large target accounts you are trying to go after. Or you could target based on types of companies that you are trying to market to—such as insurance companies with more than 10,000 employees.

To begin your ABM program, identify the accounts you wish to target. You can accomplish this by reviewing your CRM or marketing automation history, or even working with sales to identify key high-yield accounts. You can then personalize content and calls-to-action for your top “sales whale” accounts!



How Does Web Personalization Help Marketers?

THE BENEFITS OF WEB PERSONALIZATION

4. Nurture and Engage:

Marketers know that engagement beyond awareness and acquisition is a critical component of any business—whether that is through fostering a repeat purchase, a cross-sell, an upsell, or developing a customer's loyalty to your brand. With web personalization, marketers can personalize their website to drive goals (and revenue) across the entire customer lifecycle.

While you are probably familiar with email nurturing, web personalization allows you to nurture customers on the web by continuing the conversation with them through targeted, relevant offers, content, and calls-to-action. Using web personalization, your website becomes another one of your cross-channel tools to accelerate customers through their unique buyer journey.

WHAT IS NURTURING?

Nurturing, whether it's customer nurturing or lead nurturing, is the process of building effective relationships with potential customers throughout their entire buyers' journey. It facilitates your potential customer in getting to know your business; essentially, it's the courtship before marriage. With nurturing, you spend time establishing a relationship with your potential customers and building trust. And as a result, when you communicate with them, you are welcomed instead of being regarded as intrusive. For a more extensive dive into nurturing, check out our Definitive Guide to Lead Nurturing and Definitive Guide to Customer Nurturing.



How Does Web Personalization Help Marketers?

THE BENEFITS OF WEB PERSONALIZATION

5. Cross-Sell and Upsell:

Marketing doesn't end with a sale. Understanding your customer segments and the types of offers, messages, and content that motivate them is a huge advantage that web personalization offers. If you have customers that have already purchased from you, you can sell them more by recognizing

them as existing customers and segmenting them to receive offers on complementary products based on their past purchases.

6. Optimize Your Campaigns:

As you run web personalization, you can collect valuable information from your visitors about who they are and what offers, messages, and content resonate with them.

These learnings can disseminate across your programs and cross-channel campaigns, making them more effective—both in terms of engagement with visitors and overall cost. Advertisements generally send visitors to a landing page or your website, but the engagement rate only goes up if your website delivers a targeted message based on their

unique attributes or a continuation of the story or message presented in the advertisement they clicked on. Additionally, with some tools—that we will explore later in this guide—web personalization and advertising can work hand in hand to deliver unique and personal messages and ads across the web and throughout the buyer journey.



How Does Web Personalization Help Marketers?

THE BENEFITS OF WEB PERSONALIZATION

7. Increase Revenue:

All of the previously mentioned benefits are closely tied to the key benefit that almost every marketer wants to see—generating more revenue. When you better understand your online visitors, buyers, prospects, and decision-makers—in other words, when you nurture and educate them based on who they are and what they do, and then present the most appropriate offer—you are improving

your ability to drive revenue. With the right message or content, you can convert anonymous visitors to known, and drive the conversion (a form fill, a sale, etc.) that will improve your bottom line. As we've demonstrated, this doesn't stop with acquisition; personalization for existing customers improves retention, up-sell, and cross-sell—driving revenue gain across the entire customer lifecycle.

SUMMARY: THE BENEFITS OF WEB PERSONALIZATION

1. Build Brand Preference
2. Understand Visitors
3. Convert Visitors
4. Nurture and Engage
5. Cross-Sell and Up-Sell
6. Optimize Your Campaigns
7. Increase Revenue



CREATE YOUR WEB PERSONALIZATION STRATEGY

explore
TRAVELED
vacation
PLAN



Create Your Web Personalization Strategy

HOW WEB PERSONALIZATION FITS INTO YOUR MARKETING STRATEGY

Now that we have defined web personalization and examined the benefits that it offers to marketers, 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 likely already have existing segments that you are marketing to across channels. Web personalization is another important channel for you to incorporate into your marketing mix. It supports your marketing goals and uses and improves upon your existing segmentation.

To start building a web personalization strategy, first it's critical to understand your overall marketing objectives. Then, define how web personalization can support those objectives.



Create Your Web Personalization Strategy

HOW WEB PERSONALIZATION FITS INTO YOUR MARKETING STRATEGY

WEB PERSONALIZATION AND THE CUSTOMER JOURNEY

Whatever your marketing goals, you are likely mapping your supporting campaigns to your customers' journey so that your marketing activities and messages are more relevant. Effective web personalization maps to the customer journey, which might vary greatly between B2B and consumer companies, finance or healthcare, quick e-commerce deals, or considered purchases. Despite the variety, there are a few core elements that are constant, and it is essential to know and understand them to determine which message and content matters to your buyer (at the various stages). For many marketers, these messages and content are present in material you already have.

Typically, marketing activities are focused around five stages:

1. Acquisition
2. Engagement
3. Conversion
4. Retention and Cross-Sell/Up-sell
5. Advocacy

This section will cover how web personalization fits into the objectives, strategies, and tactics that you may be using at each of these stages. Let's dig in:

Acquisition

Acquiring the right customers is a struggle that most marketers face—it is risky to spend valuable dollars and still not attract the ideal customer for your product or service. Web personalization can help ensure you are presenting the right message at the right time for your ideal buyer, increasing the likelihood of converting the right customers (and being more effective with your marketing spend). It also helps you, as a marketer, know what is working (or not), so you can fine-tune your messages, content, or offers over time.



SPOTLIGHT

ENGAGE ANONYMOUS VISITORS

Particularly relevant for the acquisition phase, web personalization tools like Marketo Web Personalization enable marketers to engage 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 (you can specify what qualifies as valuable) about your visitors, such as:

Firmographics

- Company name
- Industry (by extension)
- Size (e.g. number of employees or market cap)
- Revenue

Behavior

- Search term used to arrive on your site
- Referral source
- Content consumption
- Number of visits

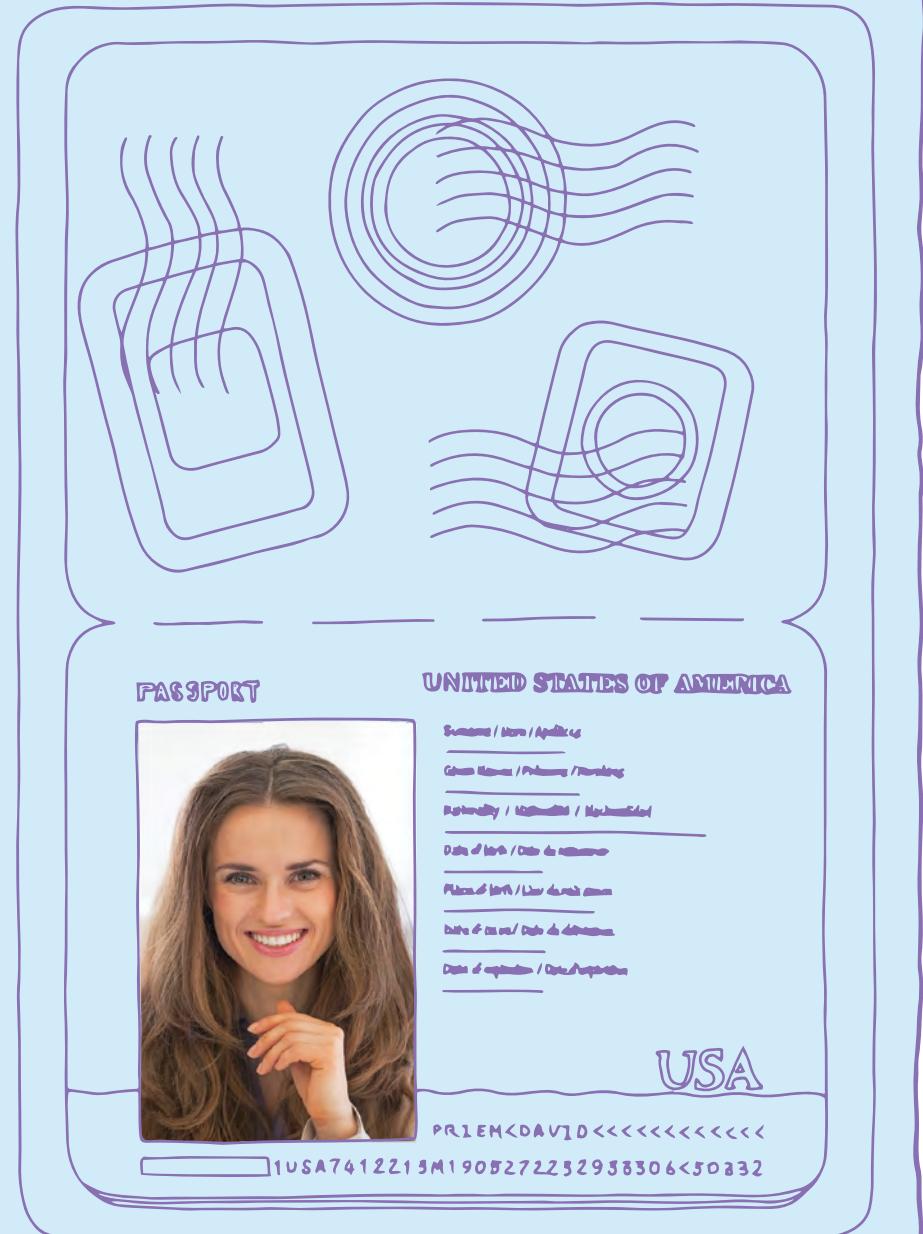
- Product interest and viewed pages

Geo-location

- Location (country, state, city and even zip code)

2. Act: Target and Engage

Then, using web personalization, you can use this information to target relevant audiences and present a customized experience to each visitor in real-time—whether that's 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, or if a visitor arrives from a specific geography to an online retailer, 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 allowing your web personalization to become smarter and more fine-tuned every time a visitor interacts with it.



Create Your Web Personalization Strategy

HOW WEB PERSONALIZATION FITS INTO YOUR MARKETING STRATEGY

Engagement

Marketers drive visitors to engage with them—whether that is by reading a specific article, downloading a piece of content, clicking on a targeted paid ad, or downloading your mobile app. Web personalization allows you to harness the attention your website receives and invest in fine-tuning and optimizing it based on the characteristics and attributes of your visitors. In fact, with an engagement marketing platform, the benefits of your web personalization efforts can extend across channels, driving online and offline engagement that's personal, continuous, and relevant.

Web personalization allows you to show your visitors that you know and understand them, and offer them real value to keep them informed and engaged as they continue their buyers' journey.

Conversion

However you define a conversion, whether it's a purchase, subscription, or other action—web personalization accelerates the path to conversion by offering visitors targeted messages, content, and offers designed to motivate them to take action. For example, while early awareness-building content is more appropriate for the acquisition stage, for conversion, you may want to deliver a personalized offer with a discount or a piece of content that offers social proof, like a review, to nudge your visitors toward making a purchase.

AN ENGAGEMENT MARKETING PLATFORM

An Engagement Marketing Platform provides marketers with everything they need to succeed as they implement engagement marketing, which is marketing that aims to develop long-term relationships with customers—from acquisition to advocacy. It addresses customers:

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



HOW WEB PERSONALIZATION FITS INTO YOUR MARKETING STRATEGY

Retention and Cross-Sell/Up-Sell

After converting a visitor to a customer, the next step is to make sure you keep them coming back for more. With web personalization, your ability to engage your customer beyond an initial purchase can be done at scale.

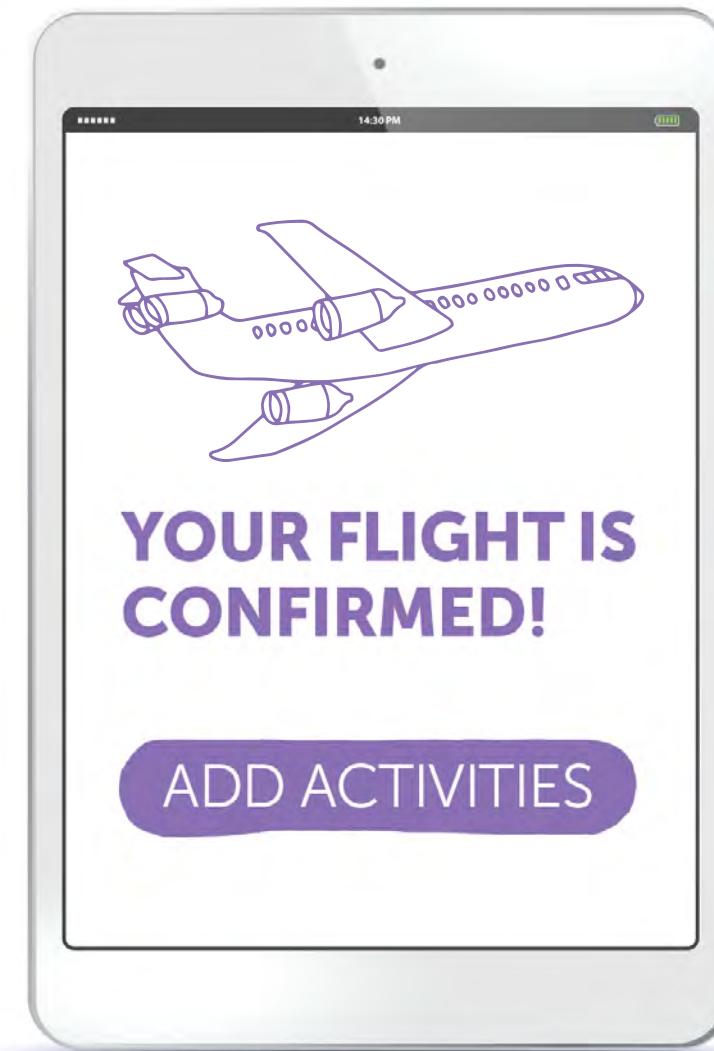
Marketers create programs and campaigns aimed specifically at retaining customers. These activities can be supported or augmented by web personalization—from recognizing and acknowledging visitors as customers when they land on your site, to giving them exclusive access to relevant content, to directing how they engage with you and your product.

Web personalization can help continue the momentum and engagement and drive cross-sales. With a web personalization solution, marketers are able to take what they know about their customer—from listening to them across channels and from past sales—and turn that into personal and relevant offers, and

product or content recommendations for products they haven't bought from you yet, or content they haven't seen; specifically those that match what they already have and what they are currently looking for.

Advocacy

Loyal customers are well positioned to become brand advocates, helping you create new business. Engaging with customers throughout their lifecycle isn't just about individual value—it's also about the value of their networks. Using web personalization, you can effectively identify your loyal, returning customers and speak to them in a manner that is very different from speaking to a new customer. You can target them with incentives to recommend your products or refer you to their 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.



WEB PERSONALIZATION AND YOUR MARKETING GOALS

Use this worksheet to outline your marketing goals and define how web personalization will help you achieve them (if you need ideas on how, read on and come back to this section):

We started the worksheet with a couple of examples.

| AIRLINE TICKET | |
|----------------------------|--|
| MARKETING GOALS | HOW WEB PERSONALIZATION CAN HELP |
| BRAND PREFERENCE | <p>The first impression on your website is critical. It should be relevant and delightful for visitors. Whether visitors are anonymous or known, having a personalized message, offer, or content piece will resonate more than something generic. If a visitor sees an offer or message just for them, your brand will likely be more appealing and stand out as opposed to a generic message.</p> |
| LEAD GENERATION | <p>Many paid, owned and earned channels will drive traffic to your site. A call-to-action that is personalized, like a vertical-focused case study, can engage a buyer throughout their journey and can help convert more visits—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.</p> |
| CUSTOMER ACQUISITION | <p>A personalized offer is known to convert at higher rates. Web personalization is ideal for increasing conversions with target segments, key verticals, or distinct geographies.</p> |
| CUSTOMER RETENTION/LOYALTY | <p>Web personalization is ideal to continue to speak to your customers and stay relevant to them based on their buying preferences. It is useful for cross-sell or up-sell, or informing them of new products that they are likely to purchase.</p> |

DEFINE YOUR WEB PERSONALIZATION GOALS

Now you understand how web personalization works, and how it can help you meet your marketing goals, across different touchpoints in the customer journey; next you need to define your channel-specific goals and develop a strategy to achieve them. To start, understand the business challenges that you are trying to address (your overall marketing strategy will help dictate these), define some early metrics, and then outline a plan of action.

This section will walk you through how to determine a set of channel-specific web personalization goals that make sense for your business and audience. Let's get started:

THE 4 Ws—UNDERSTAND YOUR BUSINESS CHALLENGES

As you saw in the previous section, personalization applies to all aspects of the buyer journey. To understand your business challenges and where web personalization can add value, start with the 4 Ws of personalization, which will help you and your team brainstorm and uncover ideas about how to use personalization to benefit your organization:

Who

Understand: *Who will you be targeting? Who will you personalize for?* The “who” is your target audience(s), which may differ slightly depending on your customers. 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 or IT teams, like the CIO, etc. With

long sales cycles, a prospect’s stage in the buyer 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 to understanding and defining your goals is to understand the “why” that’s driving the activities around your web personalization.

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

1. Why is this audience important?

Is it 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 x?

Are you driving toward more engagement, more leads, or higher conversions? What is driving that (for example, your overall marketing objectives)?

Create Your Web Personalization Strategy

DEFINE YOUR WEB PERSONALIZATION GOALS

What

Then, determine: *What do you want to say to them? What will you personalize for them?* The possibilities are nearly endless, but there are good places to start. Think about the first messages or content each audience should see as they visit your website for the first time. Try a combination of calls-to-action, images, offers, and content, which can include promotions, offers, blog posts, testimonials, videos, and more. Marketers can personalize all of these assets based on the audiences they are targeting and their objectives. We'll go into more detail on "what" you can personalize later in this guide.

Where

Finally, identify: *Where can you personalize?* Think about where on your website you can best connect with each segment or where the most value can be gained. 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 who is visiting your site for the first time, but alternatively show a 1-on-1 live demo offer to someone who has been to your site multiple times and is highly engaged. Or if you know your visitor is a return visitor, maybe it's time to offer them a coupon or free shipping, versus a first-time visitor where you may want to showcase the best-rated items from your site. It's important to remember that your site visitors don't always visit the homepage and may be directed by search engines to various inner pages. A good web personalization solution allows you to define campaigns that run across site pages and will engage the visitor wherever they land or browse your site without requiring any page specific configuration or definition.

WHERE TO PERSONALIZE:



Social



Offline



Video



Email



Website



Mobile

CHOOSE THE RIGHT WAYS TO PERSONALIZE

After you understand your web personalization goals, it's important that you are familiar with the different types of web personalization in order to identify the best ways it can help you meet your goals.

UNDERSTAND THE TYPES OF WEB PERSONALIZATION

This section will cover six main types of personalization that you can use to engage your target audience.

Let's explore:

1. Geo-Location:

One of the most straightforward ways that marketers use web personalization to target their visitors is by location. Depending on the type of business you market to and your offer, the way you target based on location could differ. For example, if your business attends tradeshows and wants to encourage visitors within a certain geographic region (be it city, state, or specific countries) to attend the show, web personalization can help by displaying a registration

discount code for visitors within that region. It's not something you would promote to all visitors on your homepage, but the ability to be selective makes it feasible—and very effective. Alternatively, if you are an e-commerce retailer operating across the globe, you can use web personalization to target visitors based on their current location—showing summer clothing to an Australian visitor and winter clothing to a Canadian visitor or display different shipping terms to encourage more shoppers to buy. Regardless of the specific use case, creating specialized campaigns that identify users based on their location offers them an experience that feels unique and personal, and is more likely to resonate with them.



WAYS TO TARGET BY LOCATION:

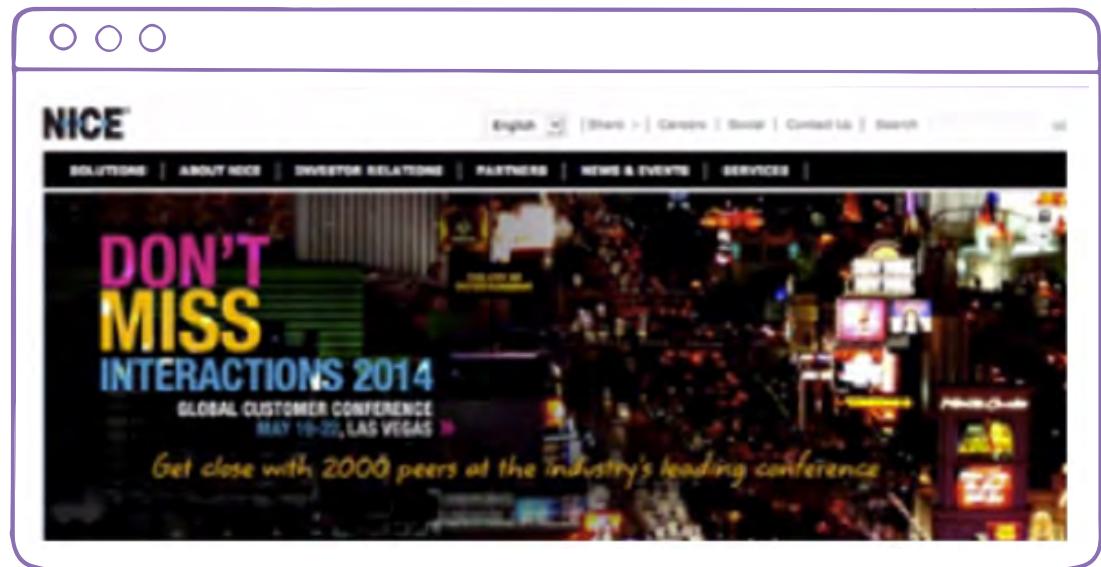
- ✓ Country, State, City
- ✓ Language
- ✓ Region Zip Codes
- ✓ Regulatory/Jurisdictional Regions

Create Your Web Personalization Strategy

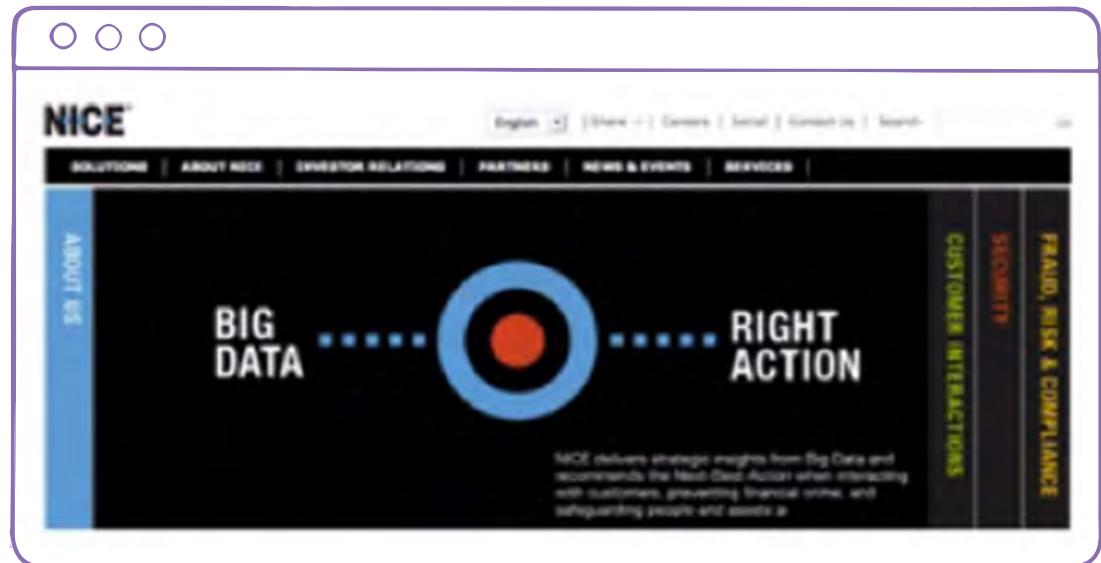
CHOOSE THE RIGHT WAYS TO PERSONALIZE

UNDERSTAND THE TYPES OF WEB PERSONALIZATION

In this example, you can see how NICE Systems, a provider of software solutions specializing in telephone voice recording, data security, and surveillance, uses location-based web personalization to target website visitors coming from United States. In the first image, you can see their standard homepage and in the second image, the personalized site—based on the U.S. 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 territories are presented with those shows while U.S. visitors see this invite to the Las Vegas event.



Personalized for US Visitors



Default View

CHOOSE THE RIGHT WAYS TO PERSONALIZE

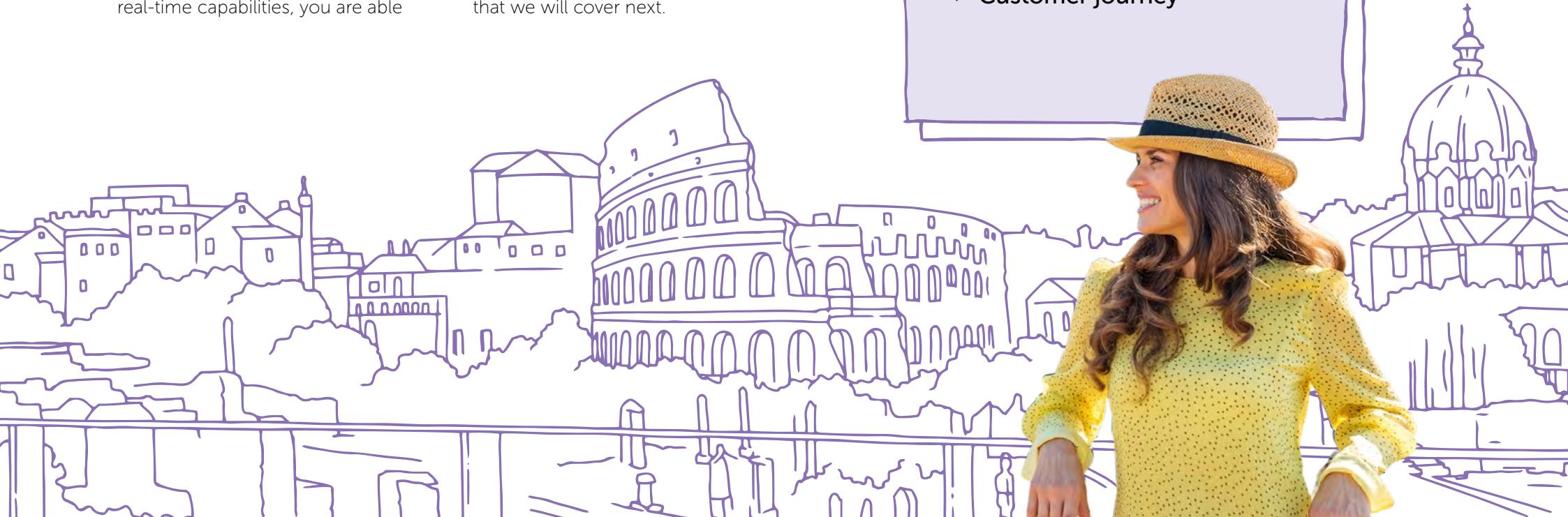
2. Behavioral:

As you observe an anonymous website visitor, your web personalization tool can build a behavioral profile for them based on the way they navigate your website, engage with material, and take action. It can also leverage behavioral aspects, such as the referral site and the search term the visitor used to find you. With a web personalization tool that has real-time capabilities, you are able

to act on these behavioral data points immediately, even 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 factors in not only their behavior, but also all the other data that you know about them. This is considered personalizing based on contact data—a type of personalization that we will cover next.

WAYS TO TARGET BY BEHAVIOR:

- ✓ Pages per visit
- ✓ Number of visits
- ✓ Specific pages viewed
- ✓ Search terms
- ✓ Referrals
- ✓ Browser
- ✓ Device
- ✓ Product interest
- ✓ Purchase history
- ✓ Customer journey



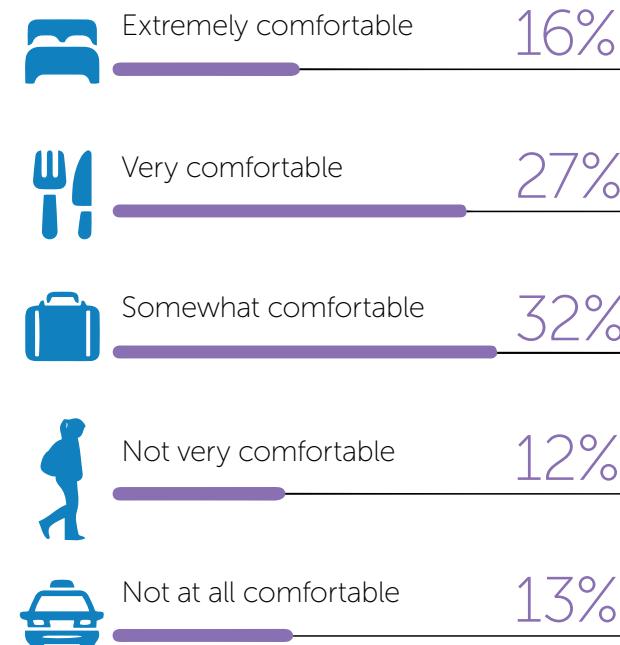
SPOTLIGHT

HOW DO CONSUMERS FEEL ABOUT PERSONALIZATION?

We have talked about how customers expect their data to be used to send them more personal and relevant experiences, but what about the most personal data? Their movement.

According to data from eMarketer, more than 75% of people with self-trackers (think Fitbits, health apps like MyFitnessPal, Apple Watches, etc.) are comfortable with that data being used to personalize ads. And this was measured early on in the adoption of wearable technology and its interaction with marketing. By now, personalization based on personal data has become even more conventional. Case in point: users of these devices, as well as visitors to your website, generate lots of data about themselves and expect marketers to use it wisely.

Level of Comfort with Sharing Their Data to Receive Personalized Ads According to US Self-Trackers*
% of respondents



Note: n=699, ages 18-24

*Those who monitor their health via apps, smart watches, wearable fitness trackers and/or websites

Source: Rocket Fuel "Quantified Self" Digital Tools: A CPG Marketing Opportunity, January 15, 2015

CHOOSE THE RIGHT WAYS TO PERSONALIZE

2. Behavioral (continued):

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, with web personalization, you would be able to suggest similar products or content the next time they land on your homepage. You can also target based on non-

traditional behavioral parameters, like price sensitivity, and then use web personalization to highlight more cost-effective items. Even very basic behavioral signals can and should be used, such as the number of visits to your site. Surely, a new visitor to your site should see one message but someone returning for the fifth time should see a different, more advanced one.

Digital behavior can tell us a lot about each visitor, for example: how many and which pages they view, how many times they previously visited your site (a new visitor should see different content than a visitor that returns frequently), the search terms they used, and the referral site or link that drove them to the site.



CHOOSE THE RIGHT WAYS TO PERSONALIZE

Welcome to Italy
Do you need to rent a motorcycle?

BOOK ONE

3. Contact Data:

In many cases, a buyer visiting a site has had previous interactions with the brand and is known to them. To take behavioral personalization one step further, marketers can use a web personalization solution that connects to their marketing automation platform to listen and respond to their contacts and customers, over time and across channels—so an activity on one channel, say an email opened or a call logged into the contact center, helps inform the personalization that occurs on their website. The

information you already have on a specific buyer, such as previous purchases or interests, score and profile, business role or customer type, can be used to further customize and optimize their buying experience on your website with more relevant offers. For example, a customer that has shown previous interest in a brand-new SUV will be presented with content and offers on your SUV models, their features, and lease terms, while a customer that already bought a specific car model can be offered a relevant upgrade or service package.

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

Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

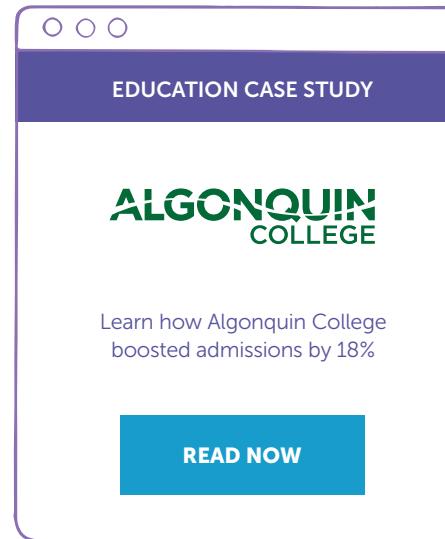
4. Vertical-Based:

Visitors arriving at your site come from a variety of places, but some may need more specific messaging than others. One example of this that many B2B marketers find valuable is targeting your visitors based on their industry vertical—like healthcare, financial services, or government. Each visitor from those 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 at least messaging the same product differently to address the

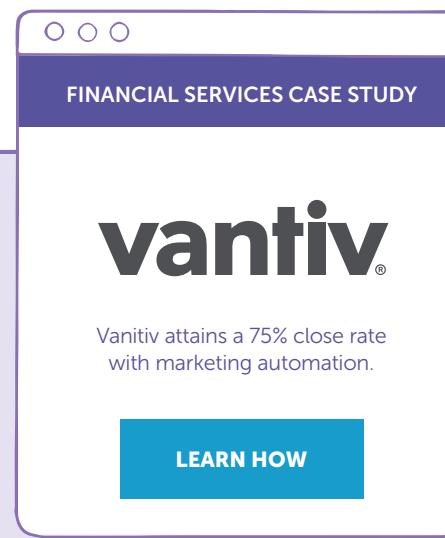
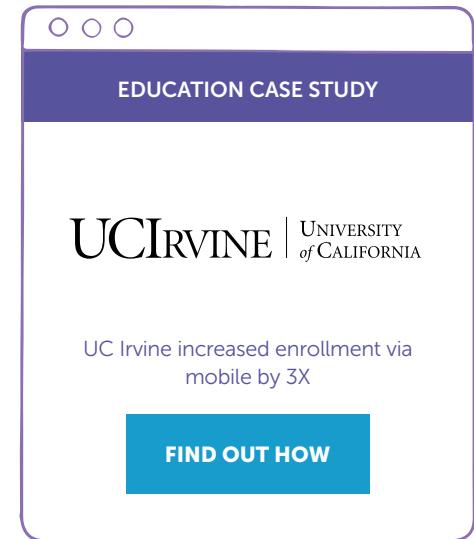
needs of the different audiences. Tailoring your website and its messages and offers to a visitor's industry will make you more attractive and trustworthy and help you advance them further and quicker through the sales cycle. In these examples, you can see how Marketo uses web personalization to offer personalized messages and offers to members of the education and financial services verticals. We even focus some of our content creation activities around creating content to support these verticals and web personalization.

HOW CAN WEB PERSONALIZATION SOLUTIONS IDENTIFY YOUR VISITOR'S INDUSTRY?

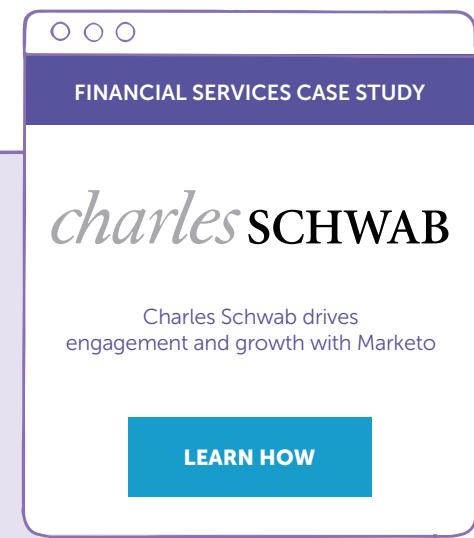
Your anonymous visitors can be identified through a very short scan of their IP address and cross-checked against an IP database lookup that's correlated with data to categorize them by industry. This must happen in milliseconds to allow you to deliver content, offers, and messages that are tailored to the visitor's industry in real-time. Advanced web personalization solutions provide this capability out of the box.



Marketo Education Vertical



Marketo Financial Services Vertical



Create Your Web Personalization Strategy

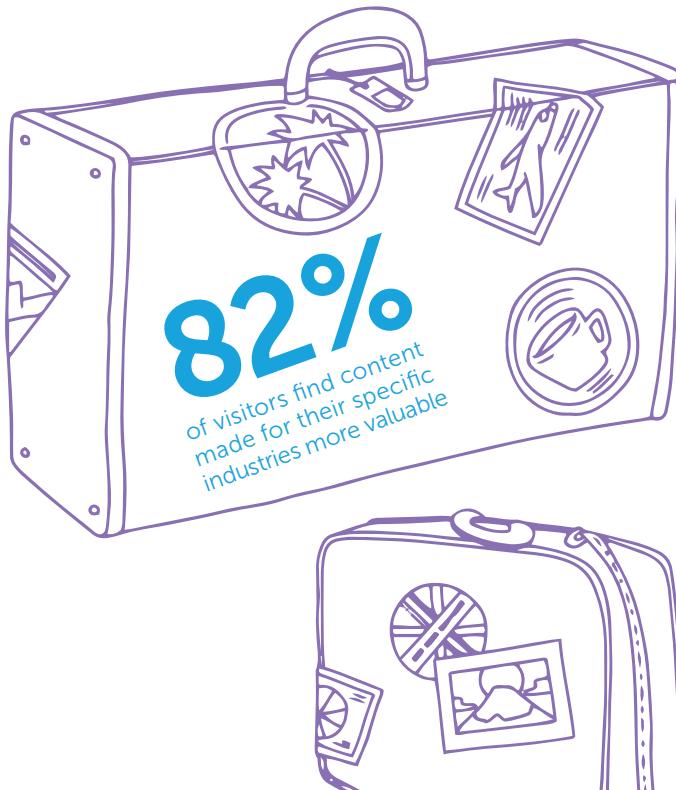
CHOOSE THE RIGHT WAYS TO PERSONALIZE

4. Vertical-Based (continued):

Another powerful technique is to display the logos of your top customers in a vertical right on the homepage whenever someone from that vertical visits your site.

In fact, according to Marketing Sherpa, 82% of visitors find content made for their specific

industries more valuable and 67% also value content created for their specific positions. Using web personalization, marketers can make this a reality—presenting content specific to a visitor's industry. And with the right technology solution, they can do this whether the visitor is known or unknown.



Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

5. Account-Based:

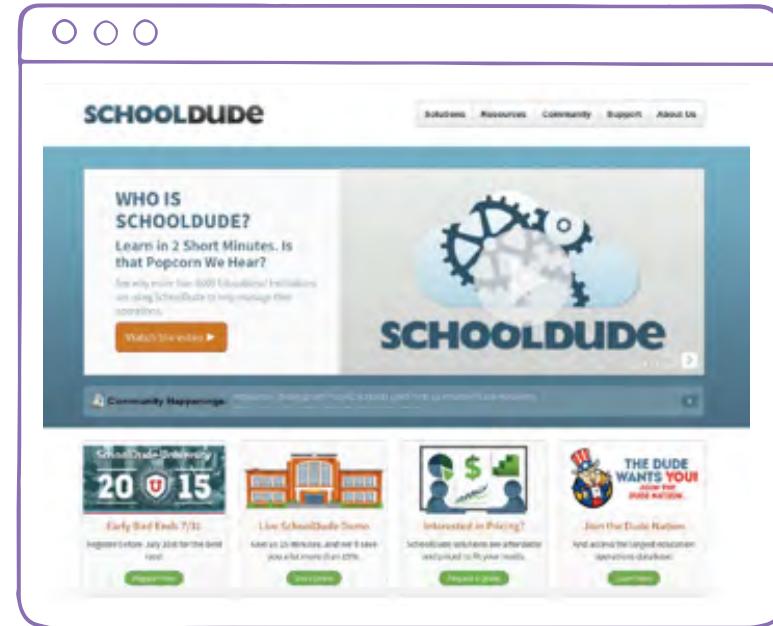
Account-based web personalization focuses the personalization of your website around a targeted and pre-defined list of accounts and individuals. Account-based web personalization enables a marketer to identify a visitor's company, cross-checking them against a named account list in real-time. If your visitor is from a set list of accounts, you are able to show them a targeted and specific message, offer, asset, or call-to-action.

Target accounts can be those most likely to generate revenue, existing customers, key strategic accounts, or any named list of accounts. With web personalization technology 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.

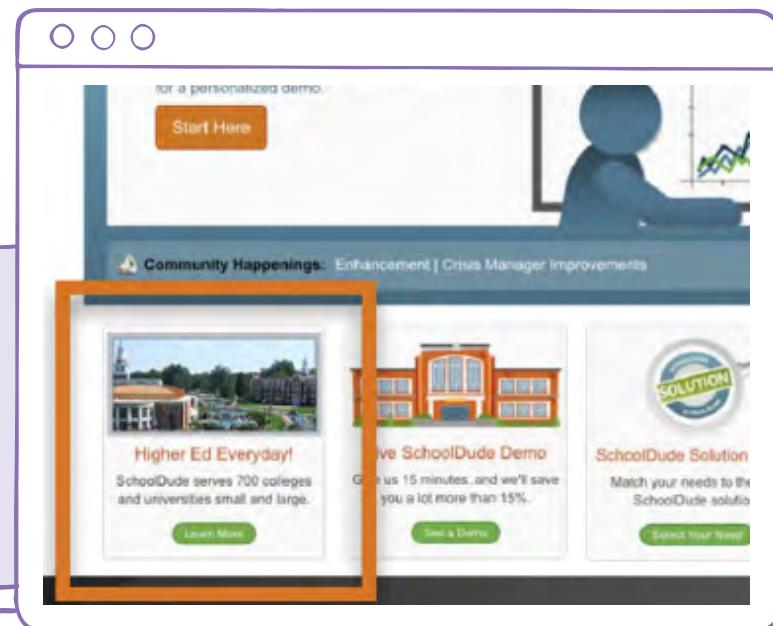
In the examples on the right you can see how SchoolDude, an education operations management suite, uses web personalization to deploy their ABM strategy.

WHAT IS ACCOUNT-BASED MARKETING?

Account-based marketing (ABM) is a marketing strategy that focuses sales and marketing activities around a select list of accounts with the goal of either penetrating or up-selling to the account by delivering personalized marketing messages to the account and its decision-makers.



Here is the SchoolDude website as everyone sees it:

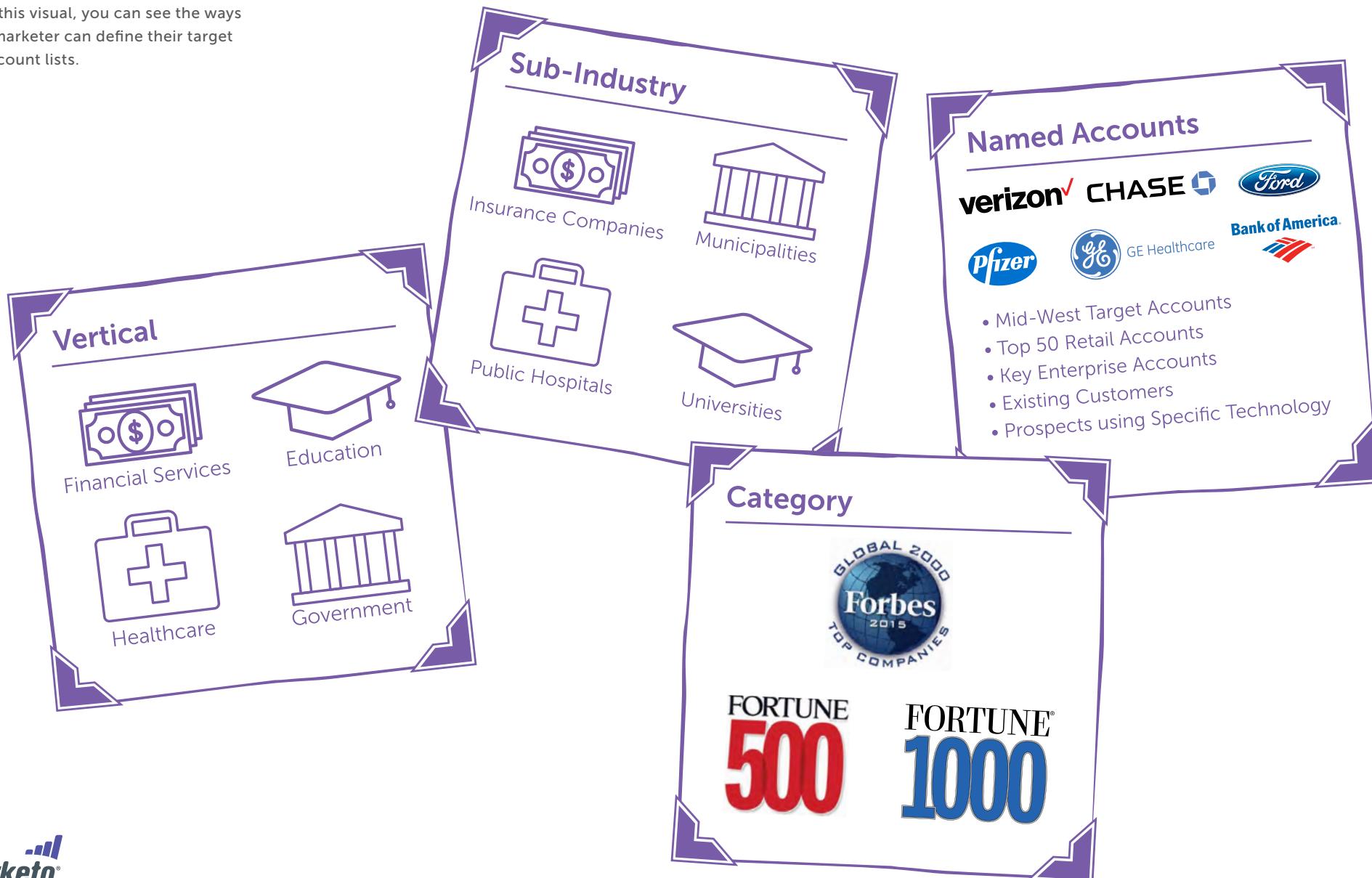


Here is the SchoolDude website personalized for a visitor from a specific higher education ABM list:

CHOOSE THE RIGHT WAYS TO PERSONALIZE

5. Account-Based (continued):

In this visual, you can see the ways a marketer can define their target account lists.



CHOOSE THE RIGHT WAYS TO PERSONALIZE

6. Predictive:

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

content or offer is the best for a visitor and when to display it.

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

Machine learning typically utilizes statistical processing models to learn and then predict what content or offers would be most interesting to specific visitors based on previous content consumption or weighted visitor attributes and their correlation with consuming specific content pieces. This allows predictive web personalization to discover which combination of attributes (location, firmographic, behavior, etc.) is mostly likely to lead to a positive 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, allowing you to run adaptive marketing campaigns. Plus, for busy marketers, predictive web personalization gives you a “hands-free” solution for reaching your website conversion goals and maximizing the value of the content and assets you’ve already produced.



Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

6. Predictive (continued):

In this example, you can see how Elastic, a data insights company, uses predictive content recommendation to offer the visitor a personal experience that drives engagement based on the current content they are engaging with.

The screenshot shows a web browser displaying the Elastic website. The main content is a blog post titled "Deploying Elasticsearch 2.0.0 with Chef" by Martin Smith, dated December 17, 2015. The post discusses the release of Elasticsearch 2.0.0 and its integration with Chef. To the right of the main content, there is a sidebar with the title "Recommended Content". The first recommended item is "SEEKING Truth Amongst 10 Billion Logs", which features a thumbnail of a person speaking on stage and a brief description: "375 million monthly website visits and over 3 million jobs listed at any given time, SEEK uses Elastic to centralize logs." Below this is another recommended item, "Elasticsearch as a Service", accompanied by a small diagram illustrating a network or service architecture.

PERSONALIZATION SPANS MANY INDUSTRIES

Personalization is also effective in the considered purchase market ranging from luxury goods to travel, software, and healthcare.

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

Luxury Goods: For jewelry sellers, if a consumer with a high-income profile performs a Google search for "gemstones" and clicks on a search result that links to your website, the homepage will be personalized, based on their profile and search term used, to a visual of a higher-priced gemstone offer.

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, allowing them to present relevant case studies and success stories from similar accounts.

Healthcare: Healthcare providers can identify web visitors by location to limit website info strictly to available policies for that specific location.

Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

IDENTIFY YOUR USE CASES

In the previous section on the types of web personalization, we covered the different ways you can implement web personalization campaigns.

In this section, we will drill down into how different types of web personalization can help you achieve your goals. Use cases are different examples of how web personalization can work for an organization.

Because of the flexibility that web personalization has to offer, there are a large variety of use cases and more than one may fit the objectives for your business. Depending on how you segment and the goals you are trying to reach, different use cases may make sense for you.

Because goals differ between B2B and consumer-focused companies, let's take a look at some examples of use cases for web personalization in action for each:

B2B Use Cases

Location

For many marketers, one of the key objectives is to support and promote event-marketing initiatives, which translates to the wide usage of location-based event promotions. Say you are hosting events in various regions throughout the country: Why not create specialized campaigns with web personalization that recognize visitors based on region and then tell them about your local events? This typically means that you can promote smaller events in a "bigger way" since people from a specific group of states, for example, will see a local event promotion on your main homepage banner while others will see different campaigns. Additional location-based examples include calls-to-action (CTAs) with the relevant language, content relevant to local requirements and regulations, and more. In this example, Tufin—a

network security company specializing in the automation and acceleration of network infrastructure—uses a location-based web personalization campaign to target all visitors from Europe to meet at a local European event.



Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

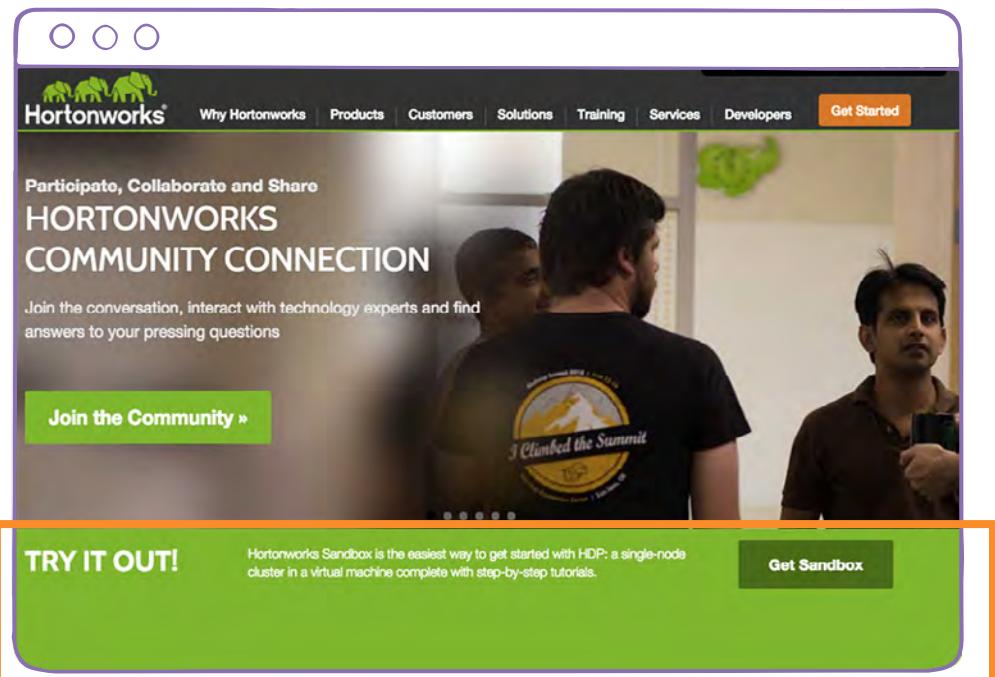
B2B Use Cases (continued)

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 that only wants to sell to healthcare and higher education institutions. Campaigns designed for verticals often leverage 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 specific message, use case, or offer when a company from a specific vertical visits your site. In the example below, Hortonworks—a software company that distributes and supports open-source Apache Hadoop data platform—changes the collateral on its homepage based on the visitor's industry. Here you see examples of the regular homepage, finance, government, and healthcare:

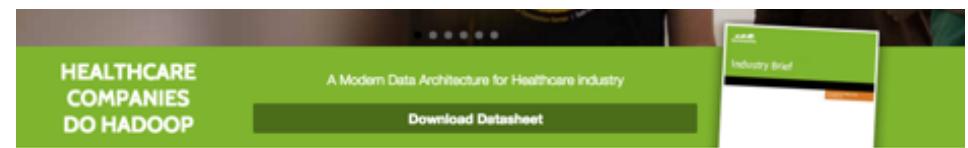
Hortonworks standard homepage



Hortonworks standard homepage



Hortonworks Government homepage



Hortonworks Healthcare homepage



Hortonworks Finance homepage

Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

B2B Use Cases (continued)

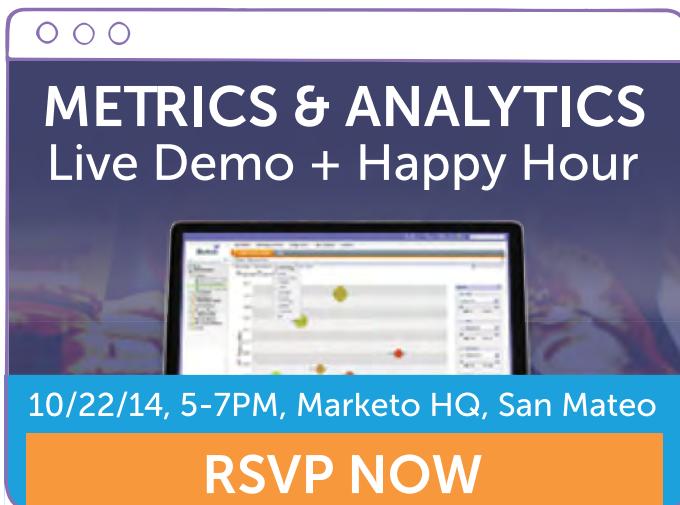
Account-Based Marketing (ABM)

An organization that employs an ABM strategy wants to target and personalize content for specific named accounts or companies with the assistance of a web personalization solution. With this account-centric approach, you can be more specific than just vertical targeting and engage 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, and engage them by targeting them by IP address (then later by contact data) to display the most relevant content, messages, and visuals to convert them, as well as alert relevant sales teams of their interest. With an advanced ABM solution, you

can also target specific offices of target accounts to make sure you are 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 engage anonymous and known individuals within a target account in a more scalable, cost-effective manner.

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



Marketo examples of ABM web personalization for customers



Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

B2B Use Cases (continued)

Persona

A marketer with the objective of driving engagement and conversion with millennials 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, industry, background—even demographic data, allowing the marketer to 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-targeting management executives and technology executives personas.

The screenshot shows a desktop view of the Turner Technologies website. At the top, there's a navigation bar with links for PRODUCTS, TECHNOLOGY, PRICING, RESOURCES, COMPANY, and CONTACT US. Below the navigation, a banner states: "Trusted by over 11,000 companies and organizations, Turner Technologies provides you the security of a hybrid cloud-based backup that will ensure you always have all of your data." A green "VIEW THE FEATURES" button is located below the banner. The main content area features three circular icons: "Hybrid Cloud Backups" (cloud icon), "Instant Virtualization" (pencil icon), and "Case Study: Backup with Jabba" (server icon). Below each icon is a brief description and two buttons: "LEARN MORE" and "CHECK IT OUT". A testimonial box at the bottom left contains a portrait of a man and a quote from Scott Jacobs, CEO of BMR Healthcare, followed by his name. The entire testimonial box is highlighted with an orange border.

Management executive targeting

The screenshot shows a desktop view of the Turner Technologies website, similar to the previous one but with different content. The banner and navigation are identical. The main content area features the same three circular icons: "Hybrid Cloud Backups", "Instant Virtualization", and "Case Study: Backup with Jabba". Below each icon is a brief description and two buttons: "LEARN MORE" and "CHECK IT OUT". A testimonial box at the bottom right contains a portrait of a woman and a quote from Ramya Delrey, CTO of Gotham Bank, followed by her name. The entire testimonial box is highlighted with an orange border.

Technology executive targeting

Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

B2B Use Cases (continued)

Behavior

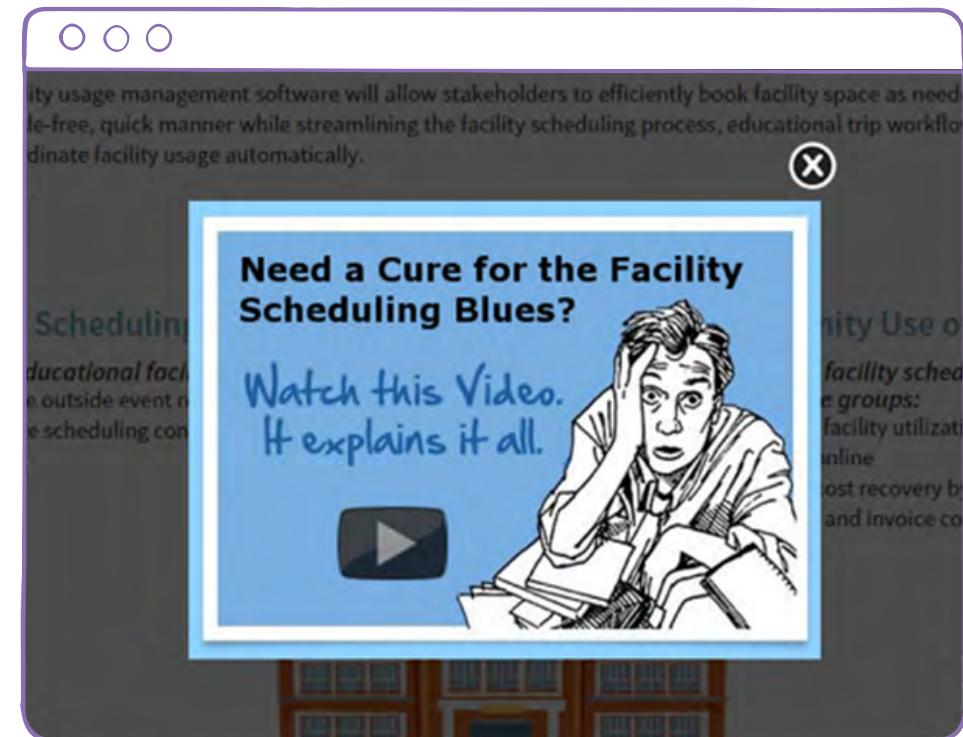
The behavior-based use case, also referred to as behavioral targeting, seeks to leverage digital body language, which in many cases is the most relevant signal for customer intent. What someone is looking for, what pages on your site they are looking at, or how many times they have previously visited your website says a lot about them. Behavioral data is especially important when prospects are anonymous, since 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 since you are delivering a continuous message and experience. Showing different messages as a prospect revisits your site is also extremely effective as well as more informative for the visitor.

In this example from SchoolDude, an education operations management suite, you see web personalization that is based on the behavior of the visitor and the page they are visiting. Based on the site 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

While the use cases mentioned in this section are presented as stand-alone use cases, the reality is that more than one will apply to you and your business and most marketers combine multiple use cases. In fact, from observing Marketo customers, we've found that the B2B use case combinations that show the highest conversion rates are:

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



Create Your Web Personalization Strategy

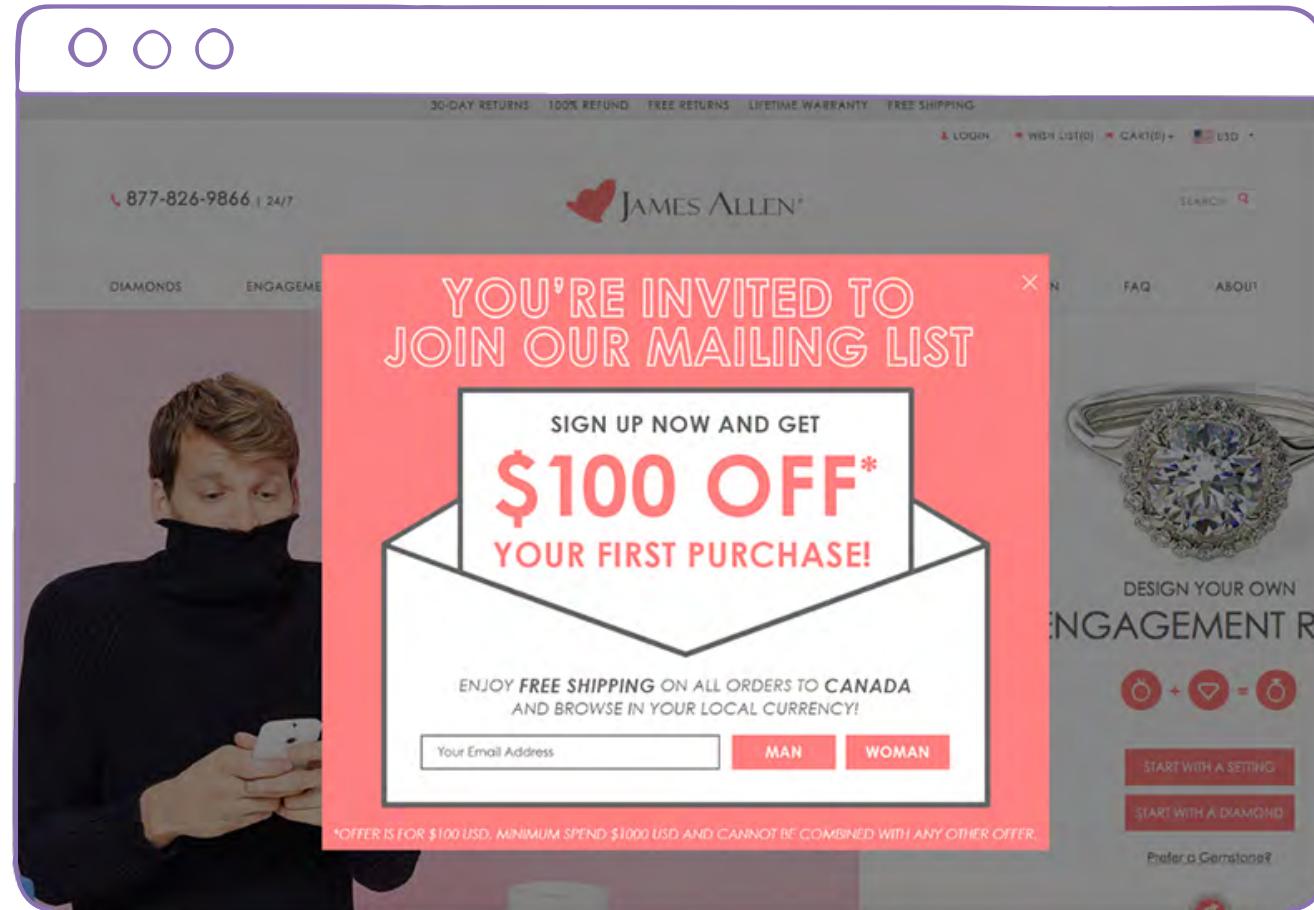
CHOOSE THE RIGHT WAYS TO PERSONALIZE

Use Cases for Consumer Marketers

Location

Similar to how the location-based use case works for B2B marketers, for consumers, it means targeting visitors by their geographical location. This approach is ideal if a company is looking to increase profits in a particular location, test a new product concept, or show different offerings because tastes vary per region. For instance, a fast-food brand could choose to highlight its regional cuisine specialties for users visiting from different countries.

You can also personalize displayed language, shipping terms, or pricing. Location-based targeting can also be used to show weather-related special offers or promote a physical store location. In this example, you can see that James Allen—an online high-end retailer that offers diamond rings and diamonds—uses web personalization to change their shipping terms and offer a promotion based on the location of the visitor.



Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

Use Cases for Consumer Marketers (continued)

Demographics

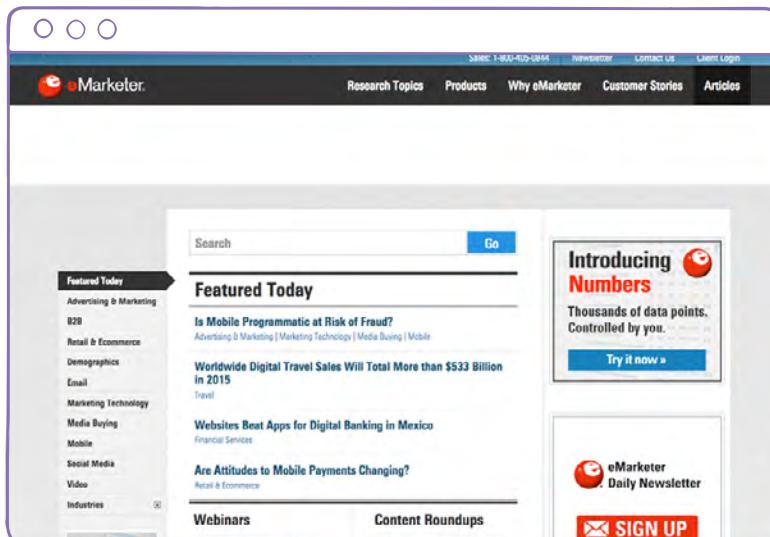
This approach is optimal when you're looking to build inroads with a specific group of people. For instance, clothing stores can increase the relevance of customer experiences by showing women's clothing when a woman visits the site or men's clothing when a man visits. Deeper information from third-party cookie providers can provide even more data to personalize by, like marital status, previous shopping interests, and more.

Behavior

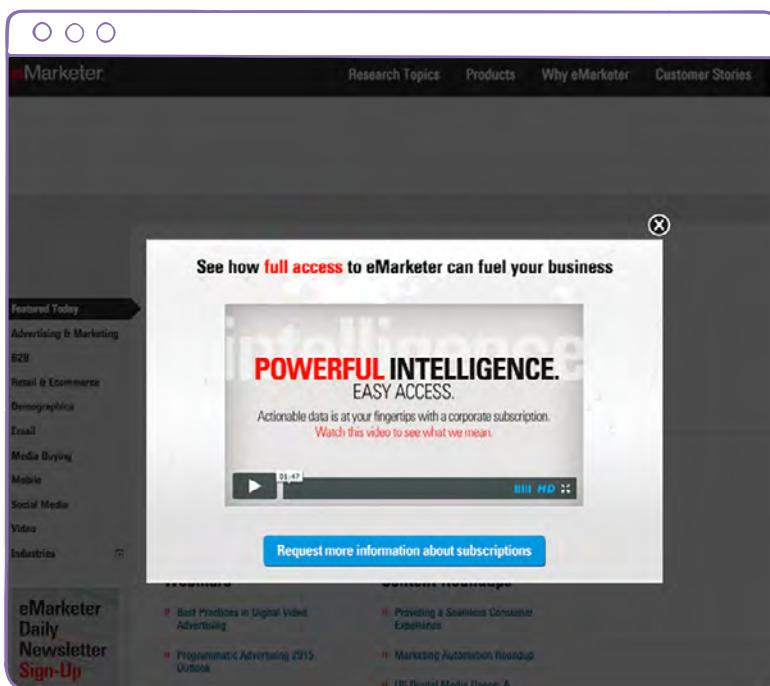
If a consumer has visited your website previously and viewed specific products, suggest similar products or content the next time they land on your homepage. This is a good technique to use when you're looking to shorten the time from acquisition to conversion.

As we touched on previously, 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 site several times. Leveraging their behavior to fine-tune the site experience and provide more specific investment options may result in faster and higher conversion rates.

In this example from eMarketer—an independent digital marketing research company—you can see eMarketer's regular website for a visitor, then based on their behavior, if a visitor has been to the site more than two times, they see the video in the dialog box that appears in the second example.



eMarketer's standard website



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

Create Your Web Personalization Strategy

CHOOSE THE RIGHT WAYS TO PERSONALIZE

Use Cases for Consumer Marketers (continued)

Buyer Persona and History

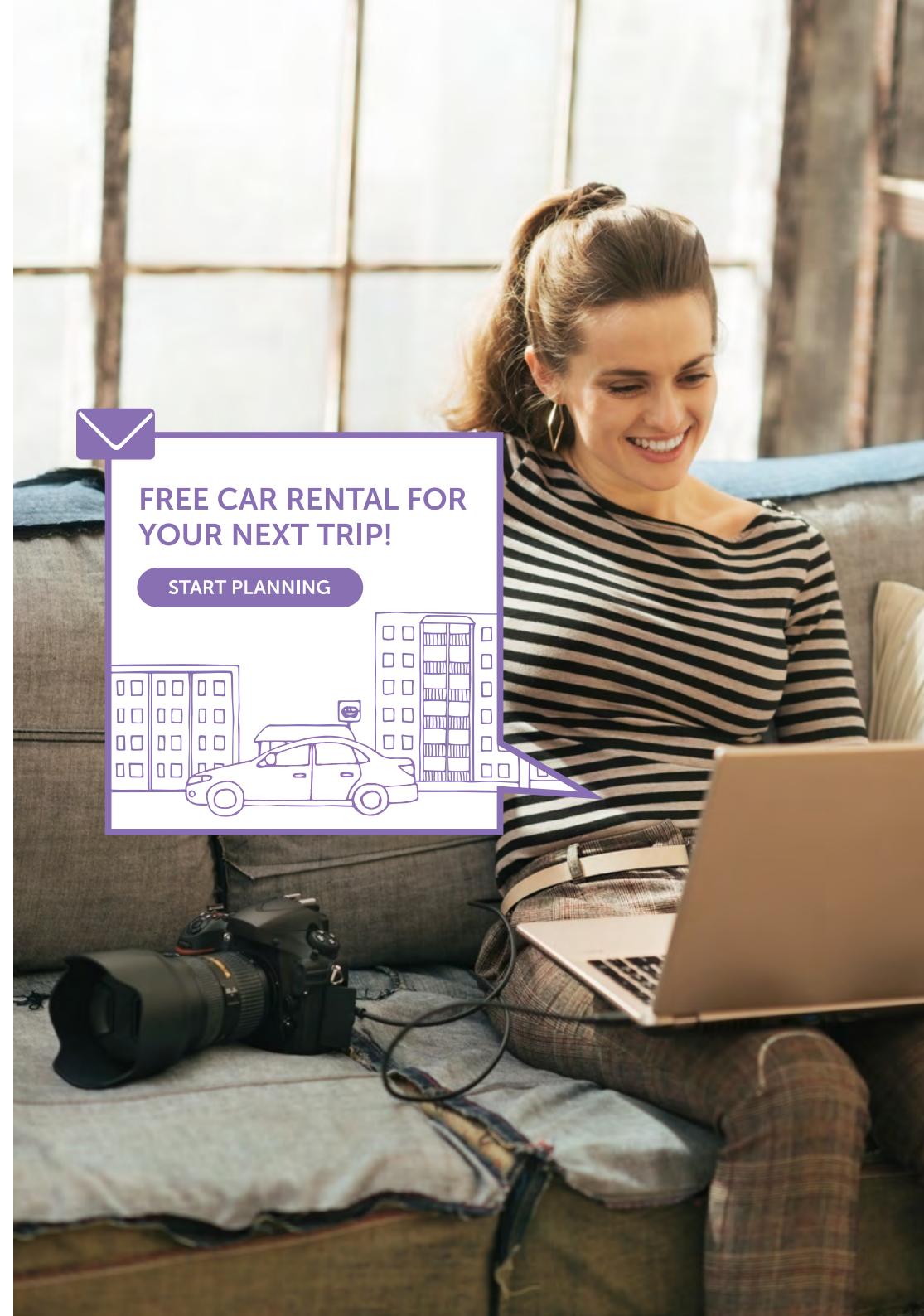
In many cases, the buyer visiting your site has had previous interactions with your brand that has given you insights about their intent. The data you already have on a specific buyer, such as previous purchases or interests and profile or customer type, can be used to further customize and optimize the buying experience with more relevant offers. For example, if your organization is a travel site that sells and resells everything from flights to hotels to rental cars to tour packages, you may use a buyer persona and history use case to offer your visitor more. If you know that someone

purchased a flight to Puerto Rico, you can personalize your site to offer your visitor hotel deals or tour group packages. You can see that this is a very powerful approach to driving additional purchases.

Combining Use Cases

While the use cases in this section are presented as standing alone, the reality is that in many cases you will combine them. Based on our observations, the consumer use case combinations that show the highest conversion rates are:

- Buyer Persona and Location
- Buyer Persona and Behavior



BRAINSTORMING WORKSHEET—WEB PERSONALIZATION GOALS

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



Fill in your brainstorming responses to the 4 Ws to help you shape your web personalization goals:

Why:

What are your marketing organization's key objectives? For example: Customer retention, top-of-funnel acquisition, accelerated nurturing, focusing on targeted accounts, etc.

1. _____
2. _____
3. _____

What:

What will you personalize? What existing content do you have that fits your audience?

Suggestions:

Calls-to-Action

1. _____
2. _____
3. _____



Who:

Who is your audience? For example: Specific locations? Industries? People behaving in certain ways? Existing customers? Anonymous visitors from specific locations?

1. _____
2. _____
3. _____

How do you currently segment them and target them across other marketing channels?

1. _____
2. _____
3. _____

Where:

Where can you personalize? On your website? Via retargeting advertisements? What areas specifically have room for growth?

1. _____
2. _____
3. _____

ESTABLISH METRICS FOR SUCCESS

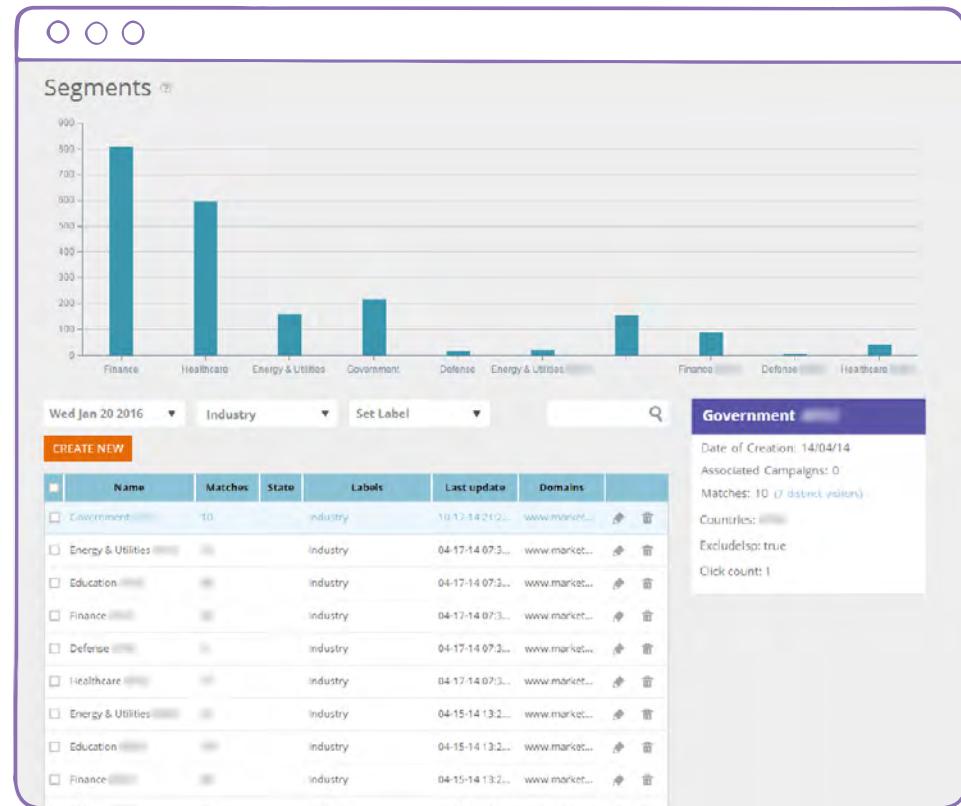
After you established your goals and use cases, it's important to think about what success will look like for your organization and then set up metrics so you can create a benchmark before you implement your web personalization campaigns.

IDENTIFY ANALYTICS THAT INFORM

By setting up analytics beforehand, you can create a benchmark for your current status with target segments in terms of engagement and conversion. It will also help validate the audience choices you made by showing you how many prospects/buyers 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 and iterating. Some web personalization tools,

like Marketo's, not only deliver their own metrics but integrate with Google Analytics as well to give you visibility into how specific segments, such as industry, company size, buyer stage, or any other behavioral segments, interact with your website. Combined, web analytics and web personalization, as part of a marketing automation platform, deliver a full-lifecycle tracking experience. In this example, you can see Marketo Web Personalization analytics in action.



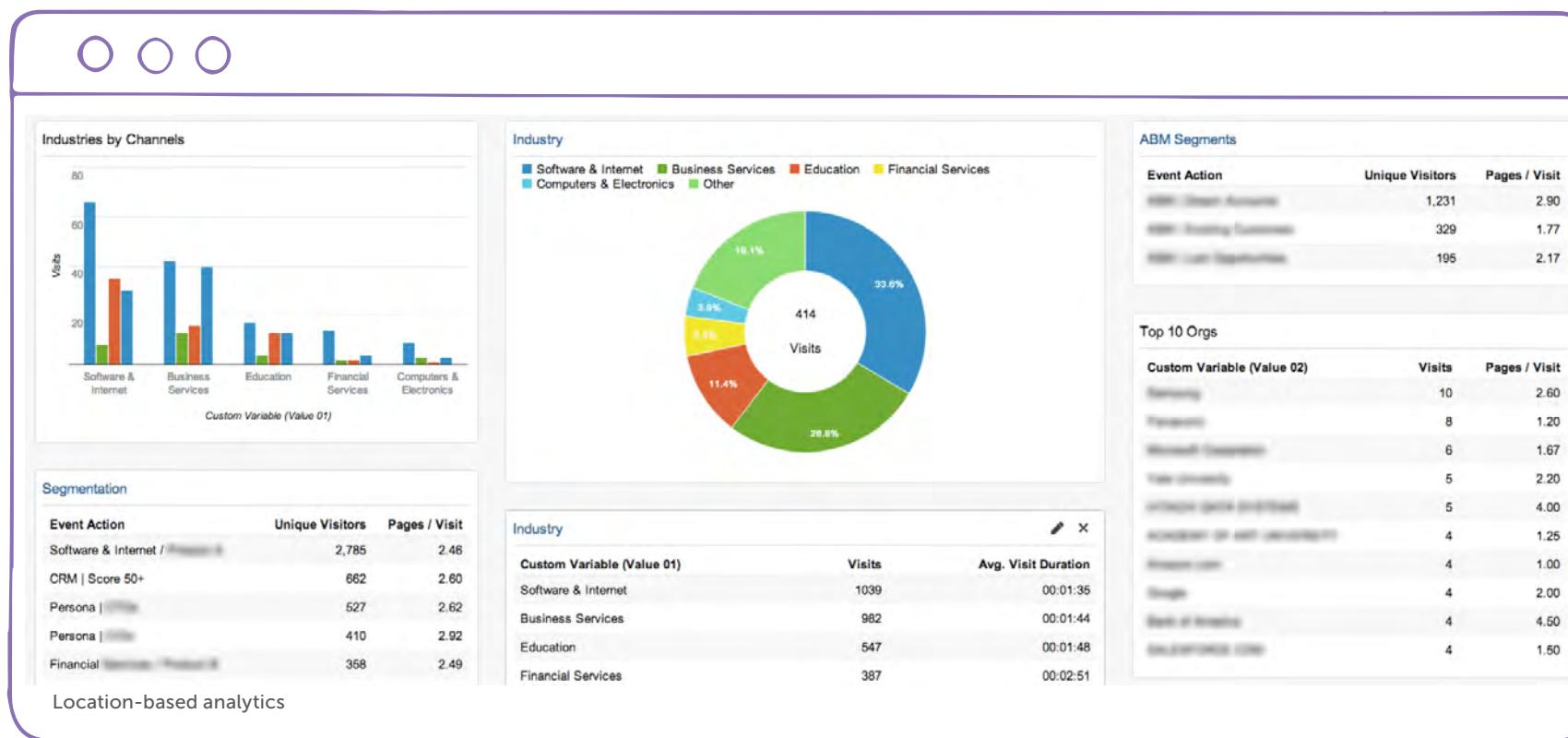
Create Your Web Personalization Strategy

ESTABLISH METRICS FOR SUCCESS

IDENTIFY ANALYTICS THAT INFORM (continued)

In the example below, 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 the Marketo Web Personalization solution. Appending segment match data to Google Analytics allows you see how your segments are performing.



View of Data From Google Analytics Appended by Marketo Web Personalization

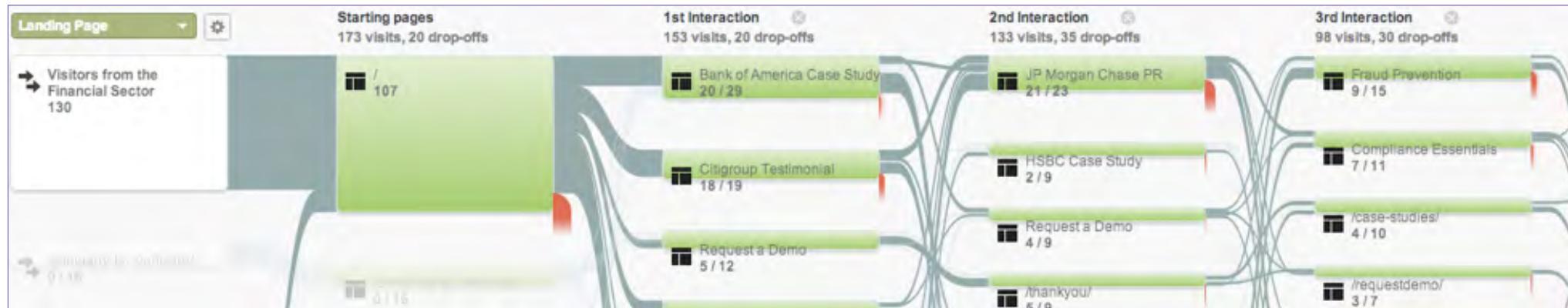
Create Your Web Personalization Strategy

ESTABLISH METRICS FOR SUCCESS

IDENTIFY ANALYTICS THAT INFORM (continued)

You are also able to see how visitors from specific audiences enter your website and flow through. For example, by combining Google Analytics data with Marketo Web Personalization data, you can see this interaction flow for specific audiences. This can be incredibly

beneficial as you shape and iterate 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

ESTABLISH METRICS FOR SUCCESS

SET YOUR SEGMENTS

Once you set up analytics, take note of how your chosen groups currently perform. This information helps you further segment your audience for more effective nurturing to guide buyers toward a purchase over time with relevant messaging and content. Here is some of the information you might need:

- **Number of Visitors:**

How many visitors from each segment, audience, and vertical visit the site today? Be sure to benchmark before and after you begin web personalization in order to fully understand how other marketing efforts drive 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 very few visitors from a target

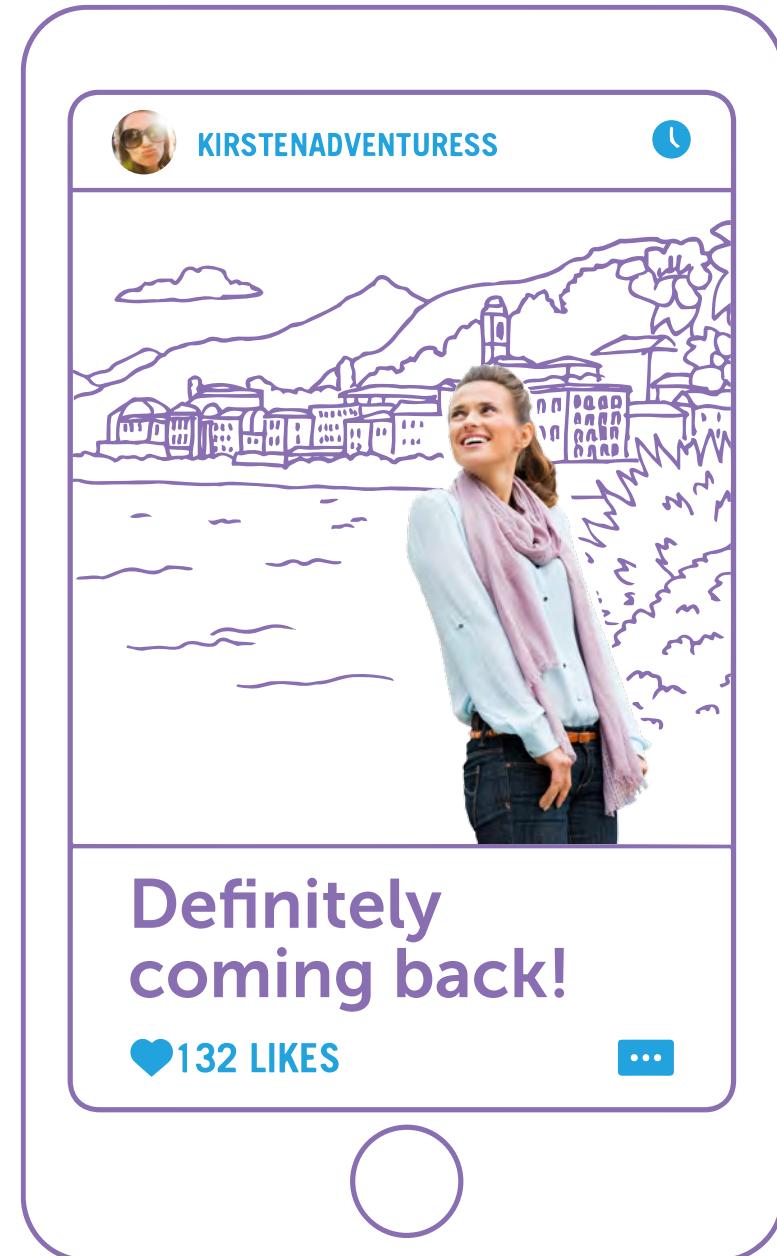
segment, it may mean few of them know about you and you can't expect much revenue from them unless you target them more effectively through other channels. Conversely, if you see a high volume or group of visitors outside your target audience, you may want to consider targeting them specifically.

- **Demographics and Behavior:**

Which types of people visit your site? What do they do once they arrive on your site? Is there specific content they consume? Is it the content you wanted them to see?

- **Engagement:**

Are people from your target segment browsing several pages per visit or bouncing right out? Do they engage with relevant content or never get to it? How many of them return to visit your site again?



INTEGRATING CROSS CHANNEL MARKETING INTO YOUR WEB PERSONALIZATION STRATEGY



STRATEGIC THINKING

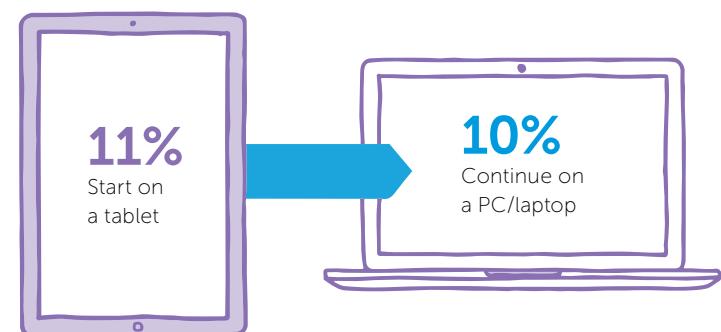
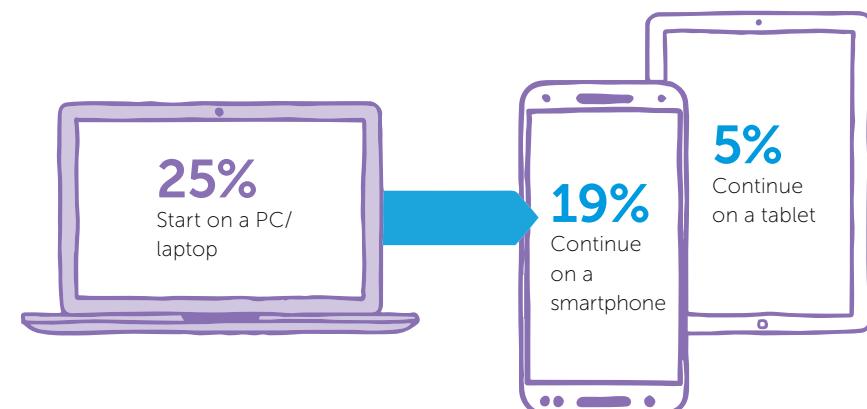
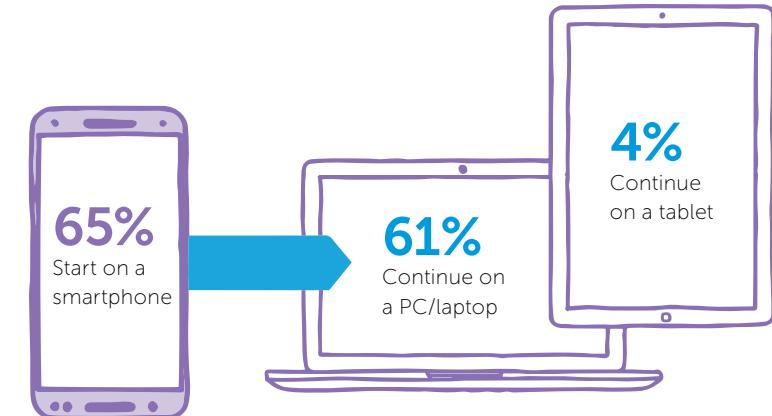
Your customer's expectation of a personal experience is not limited to your website, so your web personalization efforts need to be attuned to your customer's activities across every channel and throughout the customer lifecycle.

DON'T PERSONALIZE IN A SILO

Web personalization can complement and coordinate with every marketing channel that you use, although some channels coordinate best for different stages of the customer lifecycle.

According to data from MyBuys' Personalization Consumer Survey, coordinating messages across channels increases the performance of those channels and improves the

customer's experience. And that makes sense when you consider that the average buyer doesn't just visit one channel before purchase. In fact, they are often self-educating long before you ever know about them. According to research from Google, a majority of consumers take a multi-device path to purchase and therefore engage with you on more than one platform or channel.



Customers take a multi-device path to purchase

Source: Google

Integrating Cross Channel Marketing into Your Web Personalization Strategy

STRATEGIC THINKING

DON'T PERSONALIZE IN A SILO (continued)

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

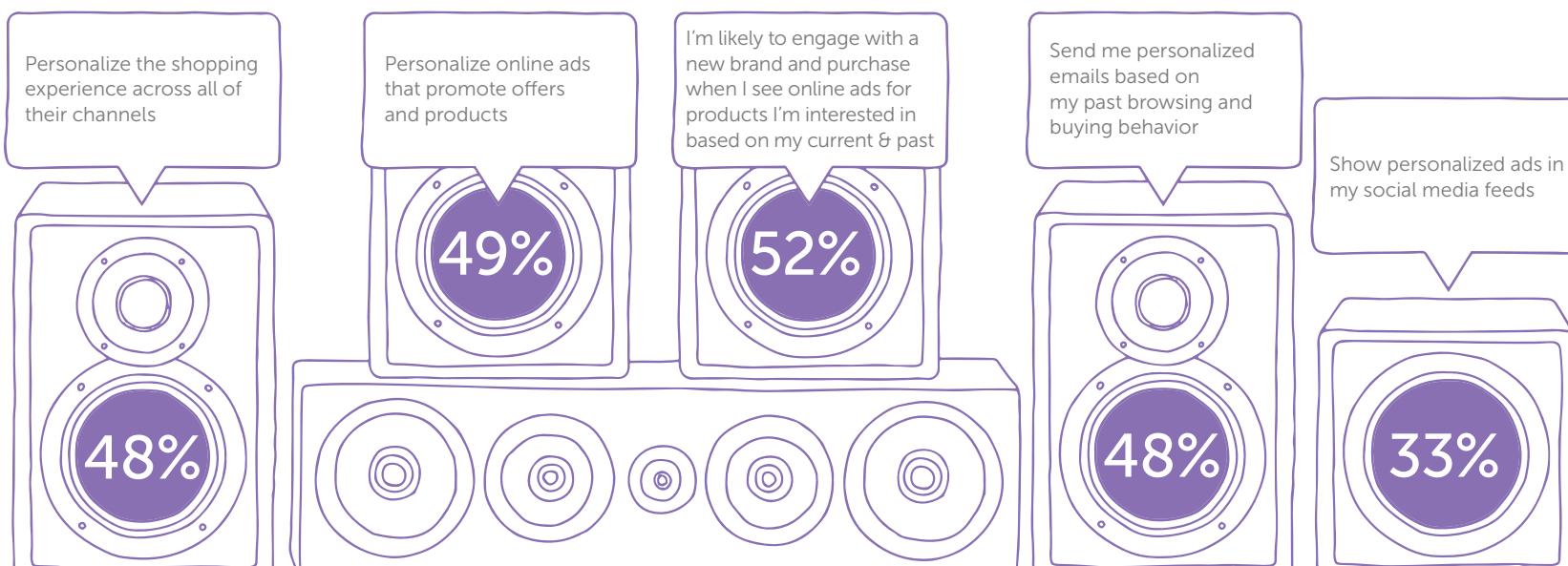
CROSS-CHANNEL WEB PERSONALIZATION WITH MARKETING AUTOMATION

If you stop to think about it, the majority of your marketing campaigns—from ads to social media to email to events—drive prospects to your website. While it's very clear for consumer businesses, the fact is that 83% of B2B buyers say company websites are the most popular channel for

their online research. This fact, combined with the knowledge that buyers move seamlessly from channel to channel, makes your website a critical interaction hub. While web personalization enables marketers to listen and respond to prospects and customers on their website specifically, often you need to employ more tools to effectively listen and respond across channels to create an experience for

customers that's not only personal, but consistent as well.

For marketers to obtain a single view of their customers and activities directed toward them, they need to use a marketing automation platform that includes a web personalization app. A marketing automation platform enables marketers to make the cross-channel experience a seamless journey for their customers.



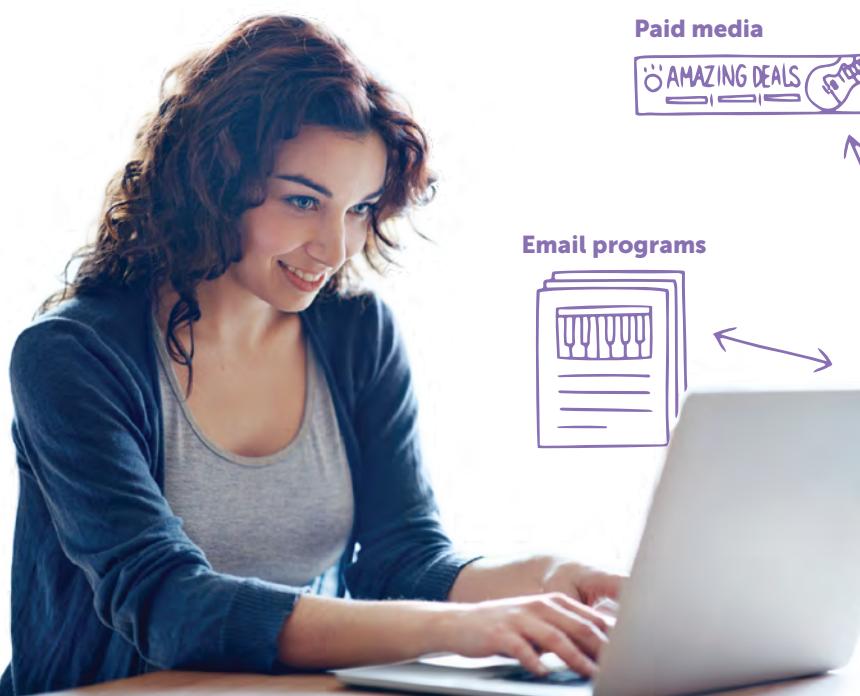
Coordinating messages across channels increases customer experience



STRATEGIC THINKING

CROSS-CHANNEL WEB PERSONALIZATION WITH MARKETING AUTOMATION (continued)

Your marketing automation platform can make it much easier for you to implement a cross-channel marketing strategy—especially when it comes to communicating to individuals consistently and intelligently at scale.



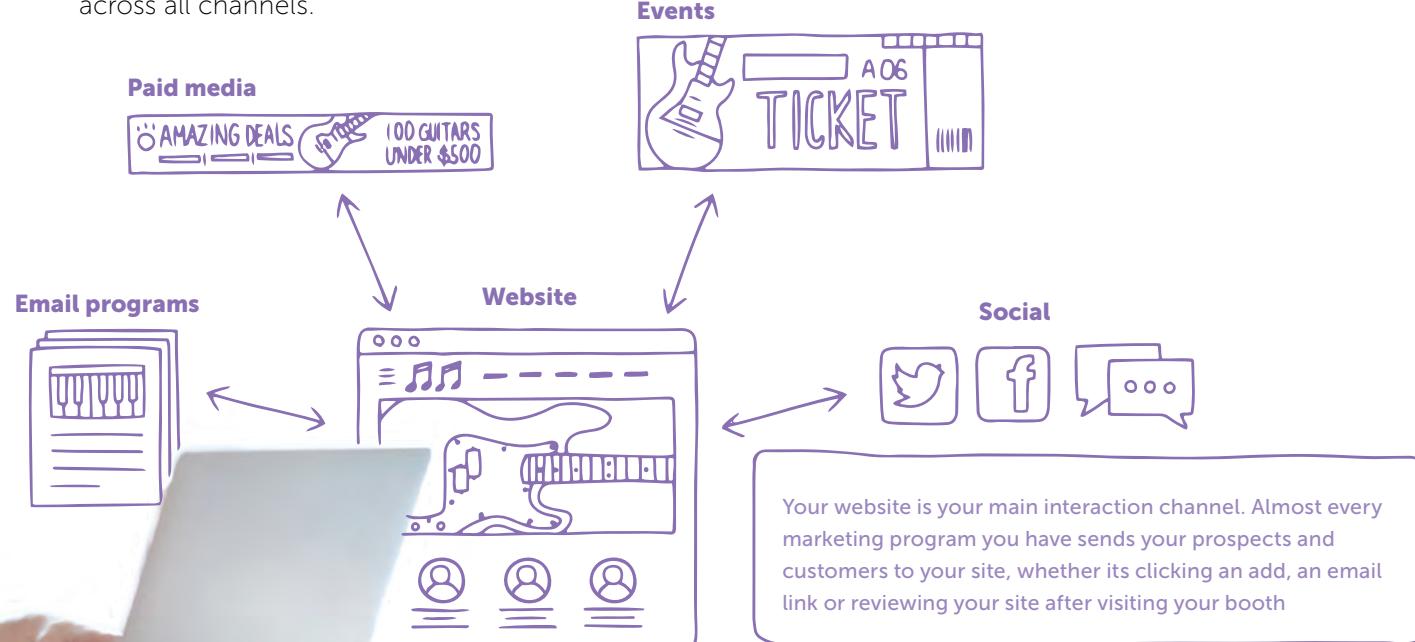
Specifically, it helps marketers:

- **Listen:** Pay close attention to buyer behavior across all channels, such as ads, email, social, mobile, and web, to create a single, integrated view of the buyer persona.
- **Learn:** Process all of your buyer's digital behavior for a better understanding of your customer.
- **Speak:** Manage, personalize, and act on conversations with buyers across all channels.

• **Measure:** Understand which activities are working and which are not from early engagement all the way to revenue.

If you are using a marketing automation platform, like Marketo, you can build customer profiles based on demographic and behavioral data gathered across many channels. With its built-in tools for web personalization, you can leverage

this data in your web personalization campaigns to create highly targeted campaigns. And because your web personalization campaigns are informed by the segmentation you use to power campaigns across channels—email, mobile, ads, and more—it becomes a cohesive part of your overall marketing strategy. By including web personalization in the rest of your marketing campaigns, you'll make your buyer's experience much more interesting and effective.



STRATEGIC THINKING

CROSS-CHANNEL WEB PERSONALIZATION WITH MARKETING AUTOMATION (continued)

As your customer browses your website and interacts with your personalization campaigns, the data you collect feeds into a master view of your customer that fuels your communication with them across all channels. And vice versa, too. Actions and expressed interests from other channels allow you to further personalize the website experience. Let's look at some of the top examples in the following sections:

WEB PERSONALIZATION AND MOBILE

With the rise of smartphones and tablets, the number of mobile devices has outraced the global population. 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.

Because of the proliferation of mobile and tablet devices amongst consumers, marketers have been forced to adapt.

Today, mobile marketing is much more than a trend—it is an increasingly important part of the market and how people access websites.

It's more important than ever that your web personalization is deeply connected to your mobile marketing activities. Web personalization can help marketers target their mobile users with personalized, relevant, and mobile-friendly offers, content, and calls-to-action. In fact, some web personalization tools, like Marketo's, allow you to identify your incoming

visitors based on their browser or device—such as iOS Safari—and adapt your offers accordingly during mobile web browsing. Marketo also offers a specific module for in-app mobile messaging and push notifications to further enhance your mobile marketing. For example, by using web personalization and mobile marketing together with a marketing automation system, marketers can offer a discount via in-app messages or push notifications based on the product the visitor viewed while she is on their website—which ultimately allows them to convert visitors faster.

320,964
Tablets shipped in 2015

1,946,456
Mobile phone shipped in 2015



316,689
PC market total in 2015

Integrating Cross Channel Marketing into Your Web Personalization Strategy

STRATEGIC THINKING

WEB PERSONALIZATION AND DIGITAL ADVERTISING

Traditionally a key channel for online acquisition, digital advertising has hit its stride, with the ability to reach customers at just the right time via website retargeting, which places display ads across an ad network for a website visitor who leaves without taking a desired action. Now, it's not just about serving ads to prospects and customers at the right time—it's about retargeting them with the right ad—one that's 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. The visitor insights gathered instantly via web personalization can be used to personalize retargeting ads when the visitor leaves your site. This makes digital advertising a perfect partner for web personalization.

For example, a web personalization system may know that an anonymous visitor is from the healthcare industry and display a healthcare-focused case study for this visitor. This information is not typically known by an ad retargeting platform, but what if it was made available to the ad retargeting platform? It would know this person belongs in your healthcare segment and could then serve a retargeting ad that offers, for example, a best practices whitepaper for healthcare professionals. By leveraging this data in your ad retargeting platform, you can "reel" visitors back to your site to show them more new and relevant content when they get there by using web personalization. This "1-2 punch" boosts website conversions and delivers the kind of personalized experience that consumers and professionals have come to expect.



STRATEGIC THINKING

WEB PERSONALIZATION AND DIGITAL ADVERTISING (continued)

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

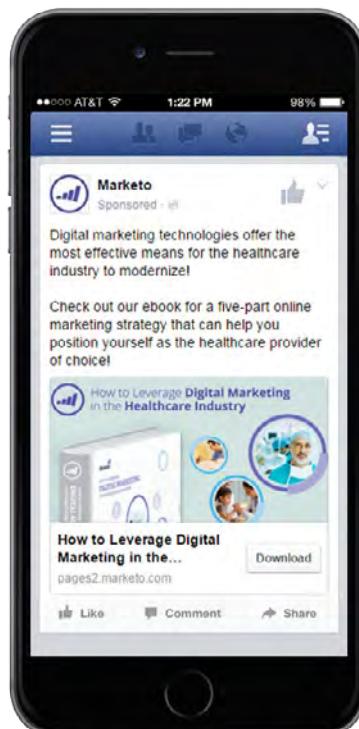
Someone highly engaged might get a demo offer through a retargeting ad if they are a business professional, or a discount if they are a consumer who has engaged through a number of channels over time, but hasn't made a purchase.

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

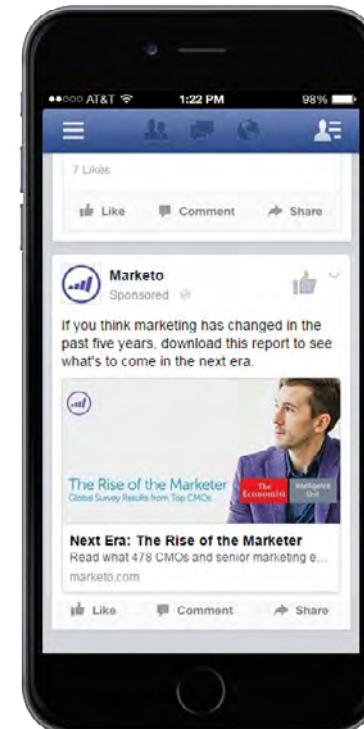
In the example below, you can see advertisements on social media targeted to segments that mirror those in web personalization. These are examples of web personalization and retargeting working hand in hand.



Geo-Location



Vertical



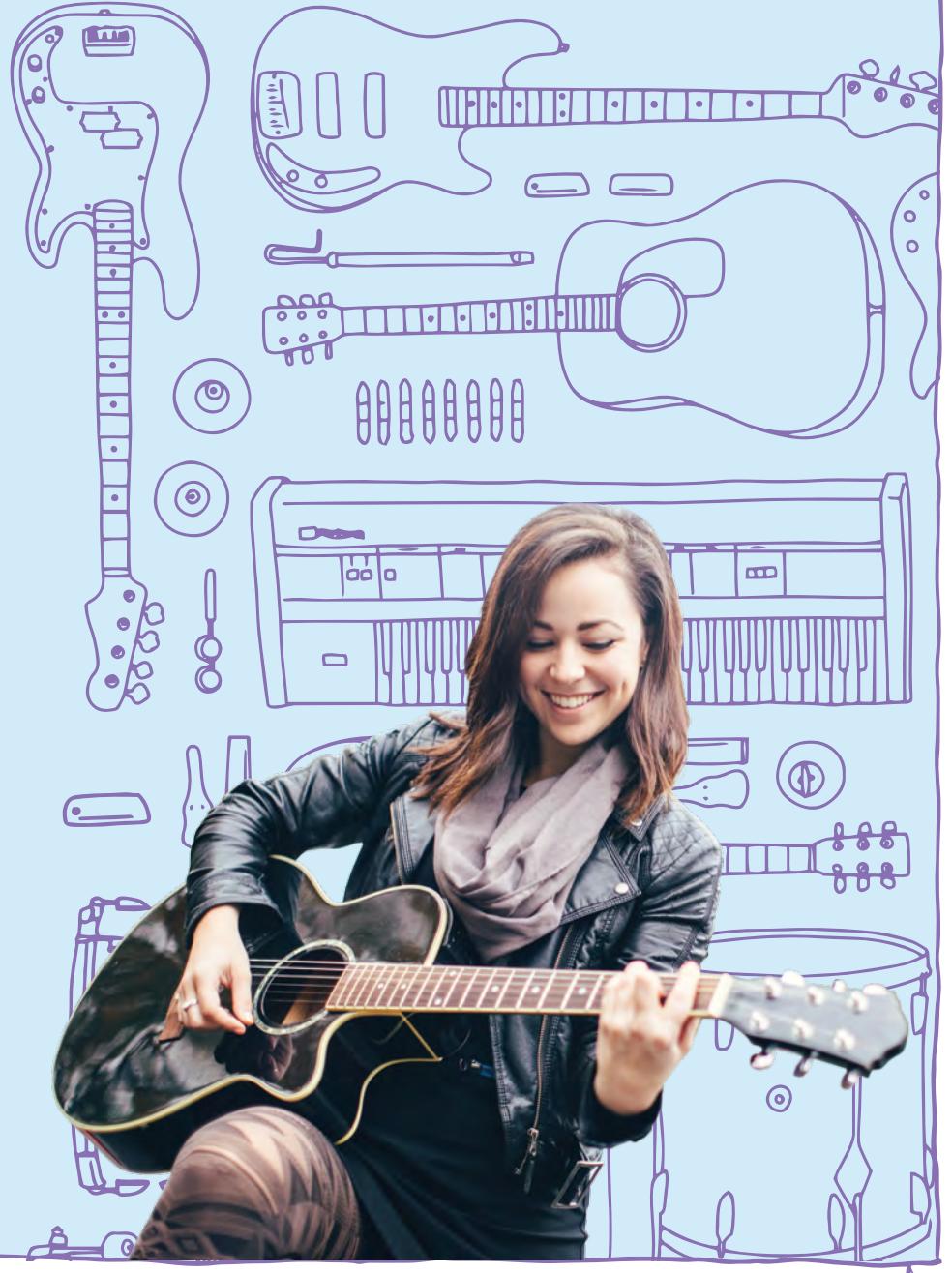
Company Revenue

SPOTLIGHT

MARKETO WEB PERSONALIZATION AND DIGITAL ADVERTISING

Marketo Web Personalization dynamically creates relevant website experiences for individual visitors as they arrive on your site and browse your content and pages. It connects to ad retargeting platforms, like Facebook and Google, to instantly enhance what those platforms know about your website visitors, so you can reach them with more personalized retargeting ads. For example, because Marketo Web Personalization is an application on the Marketo Engagement Marketing Platform, it can leverage customer profile and intent data gathered across many channels, such as email, social, mobile and more, plus internal CRM systems. Let's say a prospect signed up for a product trial, then clicked on a link in an email to download a Getting Started guide. Later, if the person comes to your website, Marketo Web Personalization could present an offer to download a Top 3 Use Cases ebook. Then, after leaving your website, your ad retargeting platform could display an ad offering a Tips and Tricks guide.

This is how Marketo enables marketers to reach customers intelligently across channels and nurture them through a process—in this case, adopting a trial product. You can personalize your ads based on who the individual is from their behavior, their demographics, where they are in the buying cycle, their level of engagement with your brand, and the content or offers they have viewed. With one streamlined view of the customer, you can have more relevant conversations with buyers regardless of which channel they are on—which is truly the holy grail for marketers!



STRATEGIC THINKING

WEB PERSONALIZATION AND EMAIL MARKETING

Email marketing is still one of the most effective ways to market to known audiences of prospects and customers. In fact, according to Capterra, 91% of U.S. consumers use email every day. Furthermore, 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. But imagine the tried and true power of email combined with other channels to create a consistent story and experience.

Web personalization and email marketing combined enable marketers to create customized experiences, respond in real-time to customer behavior, and offer each individual customer deals and information about products and services that they are looking for at

that moment—straight to their inbox. Customer nurturing—across the entire customer lifecycle—is better with a personalized web experience and emails that draw on the same data to pick up where the other left off. Marketers are now able to offer customers a seamless and personalized experience across all channels, including personalized emails in addition to your personalized website.

WEB PERSONALIZATION AND OFFLINE MARKETING

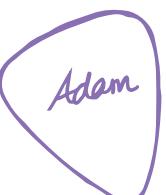
While many marketing activities are digital, there are plenty of offline channels that can integrate well with, and benefit from, web personalization. For example, if your company is a brick-and-mortar store, retaining a database of your customer's activities in and out of the store—such as social media contest

submissions, recent purchases, online reviews, etc.—can help you tailor your interactions with them. Do you want that visitor to sign up for your loyalty program? Invite them to sign up during their in-store visit and once they are a part of it, send them a welcome email directing them to your website to deliver a unique or exclusive experience to encourage the next action.

In another example, if you are attending an industry tradeshow, every scan that you get there can serve as a way to target users who visited your booth. You can use this to score them as being interested in your company and continue the conversation with them post-show. Or you can use this information to offer location-based offers around the vicinity of the show—so that even prospects you didn't scan, but checked out your website after

seeing your booth, can have a personalized experience and see offers related to the specific event or get offers to revisit the booth for a personal meeting.

Another offline channel that web personalization can enhance is print advertising. If you send direct mail campaigns, using personalized URLs (PURLs) can not only drive your customer to your website, but also allow you to hand-select the type of content they see. This can be a great way to gather information about your leads. For example, if you are missing someone's email address, you can send them a direct mail piece with a PURL to download a coupon. When they visit the website, they'll be directed to a personalized landing page to fill out their email address to get the coupon. Once you have their email, you can start including them in your email nurture campaigns.



YOUR CROSS-CHANNEL WEB PERSONALIZATION PLANNING WORKSHEET

Use this worksheet to help you, and your team, determine how to incorporate web personalization into your activities for each of the marketing channels listed below. It's important that the web personalization type supports both your goal and your messages, and coordinates tightly with the messages on the supporting channels. It's OK to not use all of the channels or to have multiple rows for some channels. We filled in the first section for you as an example:

| Marketing Channel | Goal | Personalization Type | Message/Offer/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 | | | | | |

CREATE A PERSONALIZED WEB EXPERIENCE WITH CONTENT



CREATE A CONTENT PLAN

A successful web personalization campaign requires content. To create a fully personalized experience, map out your existing content to include customized calls-to-action, offers, and content for each segment, at each stage of the customer journey. For instance, a CTA to download an ebook should be personalized based on the site visitor, and the ebook itself should be consistent with the CTA and match the customer's stage.

CONTENT DISCOVERY

Once you know who you're targeting, it's time to decide what message format you'd like to present to them. Whether you're a B2B marketer working with content like case studies, videos, and ebooks or a consumer marketer working with special offers, videos, and ads, you probably already have content that appeals to many of your different audience segments. But personalization is all about making sure that your content gets seen and consumed by the right people and that it provides value to them. To do that, you may want to consider the type of

content you offer and at what stage it's best for, in addition to what it looks like and where it will display on your site.

While it may sound daunting to create the amount of customized content needed to implement web personalization, **the fact is, most of the content you need for personalization already exists!**

There are strategies you can employ to do more with less. To make your existing content go even further, you can recreate sections to make them more relevant to specific industries or demographics.



Create a Personalized Web Experience with Content

CREATE A CONTENT PLAN

CONTENT DISCOVERY (continued)

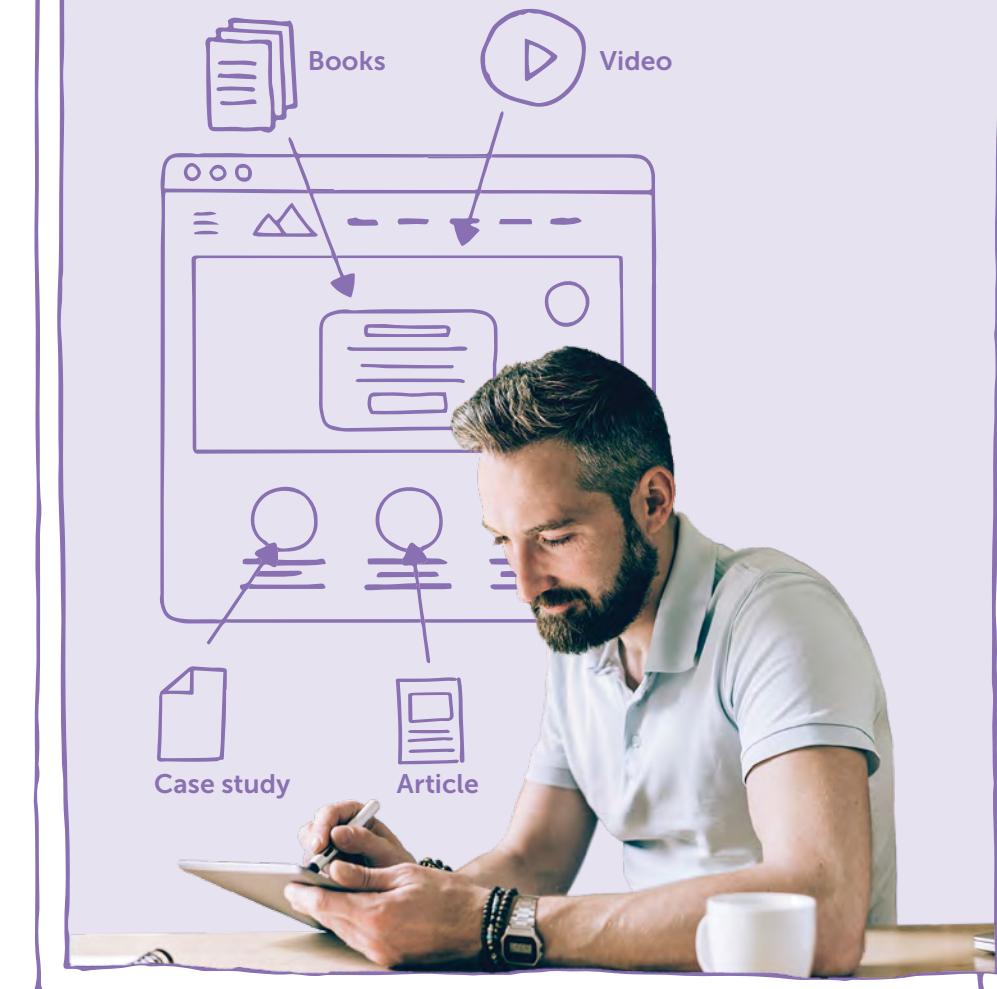
Think about all of the ebooks, customer reviews, case studies, product videos, special offers, and testimonials you already have. Can you use those for different segments? Can you change a few minor details or examples in order to be relevant? Employing a content recommendation engine (which we will define in greater detail later in this section) helps you to provide a seamless, relevant experience to your visitors. A content discovery tool allows you to identify the content you already have and discover the opportunities to use it and/or tailor it more effectively.

CONTENT TYPE

Many people wonder what type of content they should use and when. Video versus white papers, ebooks versus case studies, or various types of special offers versus customer testimonials. While there is no one answer (you should always test... which we will cover later) there are some best practices and guidelines that indicate what type of content is appropriate for different stages of the customer journey. We'll explore this more on the next page.

CONTENT DISCOVERY

Some tools, like Marketo Web Personalization, offer a content discovery module, which automatically discovers content on your website. This helps you learn about all the content you have available and its current consumption patterns and lead gen performance, making it easier for you to choose which content to display and to whom, without the manual work of listing and evaluating it.



CREATE A CONTENT PLAN

1. Early-Stage:

This content addresses buyers that are becoming aware of your product or service, therefore the content you offer should be easily accessible. The goal here 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:

This content most often addresses buyers during the engagement stage as they are considering a purchase. At this stage, your buyer has an addressable need, so your content can be more specific to your product or service. Because you are trying to learn more about your buyer (converting anonymous visitors to known), content at this stage is usually gated. 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:

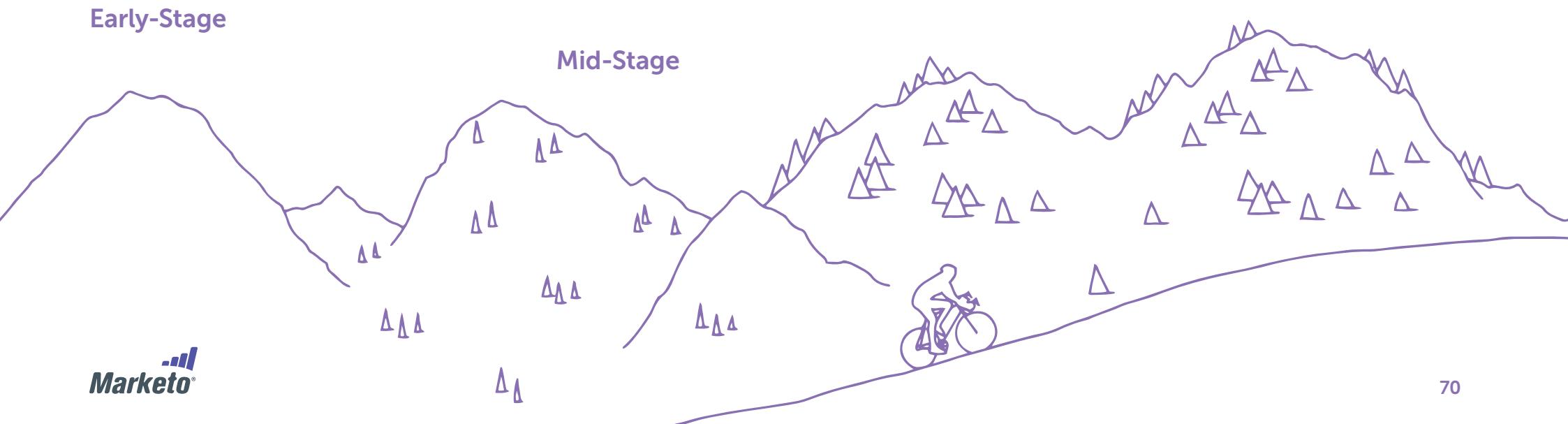
The content at this stage is meant to remove any barriers to conversion. Your content aims to answer why the buyer should purchase from you. This means you can draw your big guns in terms of content—offering a checklist for purchase consideration, customer reviews, or your best offer (whether that's a percentage discount and free shipping if you "Buy Now" or "Meet our CTO").

After mapping out your campaign matrix (which we do in the next section), you may discover that you have some content gaps that you need to fill.

Early-Stage

Mid-Stage

Late-Stage



Create a Personalized Web Experience with Content

CREATE A CONTENT PLAN

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 that your content is not only tailored to who your visitors are, but where they are in their journey. Web personalization software allows you to adjust your calls-to-action based on the person visiting your website.

Outline your chosen groups—whether you're targeting separate regions, demographics, or verticals—and select relevant content for each stage of the buyer journey.

B2B Campaign Program Matrix

For B2B, this 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 that each marketer may have different stages defined). 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 3rd party analyst report as you near conversion.

To the right is an example plan for an industry vertical. You can see that the content is not only tailored to the segment and its interests, but also 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 (we will talk about this in a later section) to learn which asset actually works best for each segment and stage.

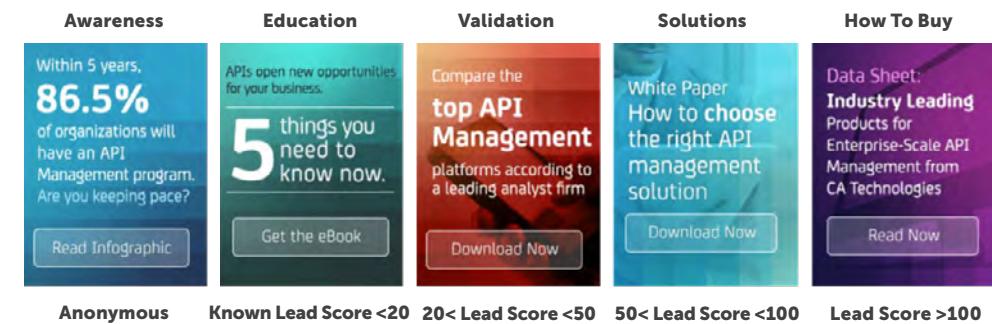
This matrix template can be used for other scenarios other than segment/stage such as segment/location, customer type/location, and more.

In the next example, you can see how CA Technologies—an IT management software and solutions company—mapped out their campaign matrix for web personalization.

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 |



Create a Personalized Web Experience with Content

CREATE A CONTENT PLAN

Consumer Campaign

Program Matrix

For consumers, you would typically include three sections: awareness, consideration, and decision (depending on the length of your sales cycle and type of product/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 onto a customer testimonial once their interest has perked. Finally, you may want to seal the deal with a special offer.

A campaign matrix for consumers might look like this:

| Campaign Program Matrix | | | |
|---------------------------|--|---|--|
| Example: Consumer Product | | | |
| Target Segments | Awareness | Interest | Decision |
| Product Interest A | Product Highlights Infographic | Product A Versus the Others Video Comparison | Last Minute Special Offers Localized Delivery and Shipping Details Shipping Policy |
| | Product Introduction Introduction Video | Happy Customer Testimonial | How Product B Won International Awards Press Release |

Create a Personalized Web Experience with Content

CREATE A CONTENT PLAN

CHOOSE AND CREATE SMART CONTENT

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

Repurpose Content

To maximize the potential of your personalized campaigns, you may have to create new content, but you may also be able to repurpose some of the assets you already have. Take a look at the relevant content you've already developed and see if you can revise the following to make it targeted to your specific groups:

- **Titles:** Revise titles as necessary to better resonate with your target readers.
- **CTAs:** 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.
- **Maximize Content:** Slice and dice the content you have into smaller assets, like cheat sheets, short ebooks, or even blog posts. In the following example, you can see how a larger report, The Rise of The Marketer, was broken into different assets based on segment.
- **Visuals:** Can you swap out the cover page and some of the interior artwork to make it feel more relevant and targeted to your audience?



Original Report



A Shift to Big-Picture Thinking



Infographics

Breakout Assets for Segments—two infographics

Create a Personalized Web Experience with Content

CREATE A CONTENT PLAN

TEST AND OPTIMIZE YOUR CONTENT

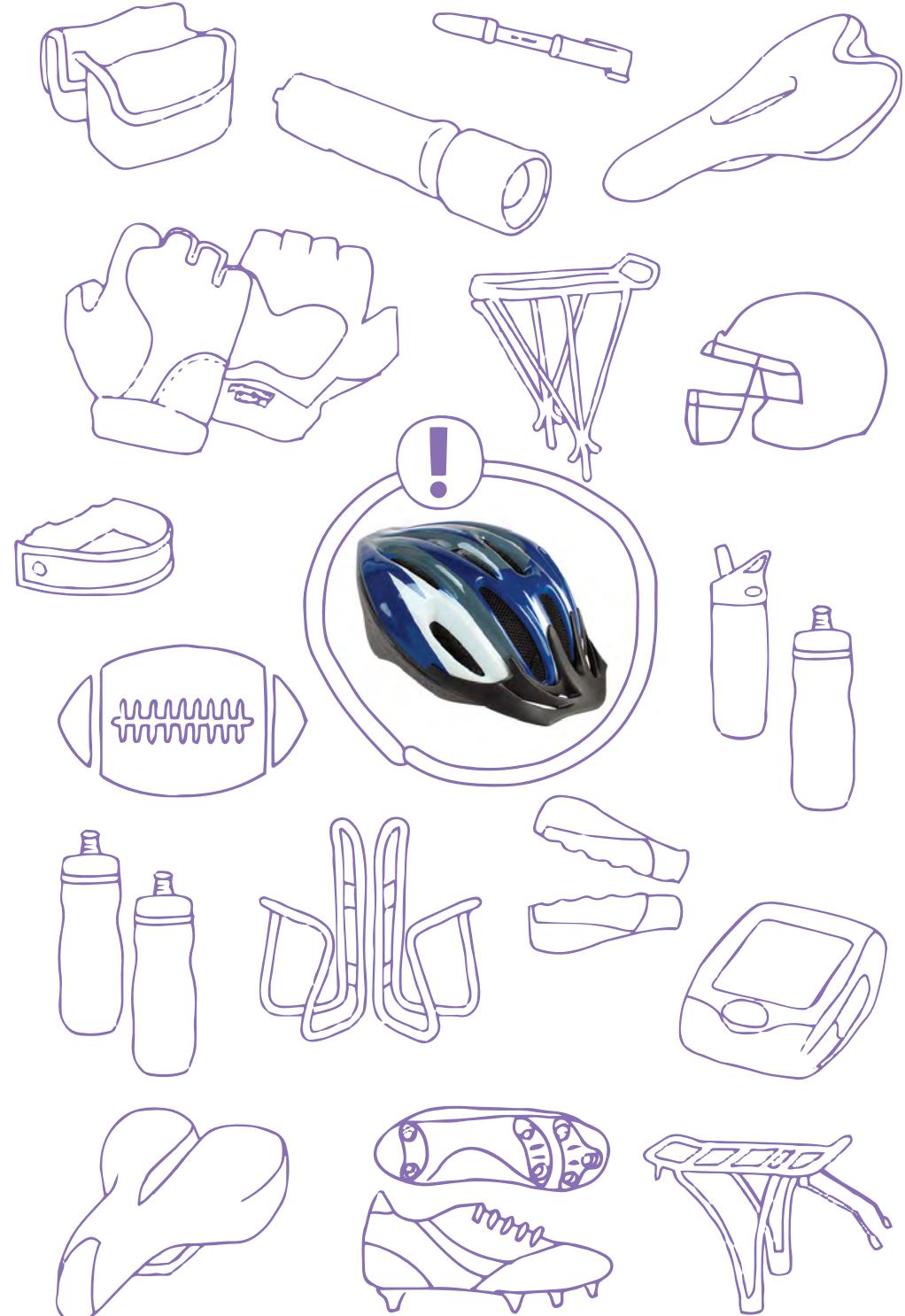
Web personalization helps you understand what content works and doesn't work. Whether you're using a content recommendation engine or not, it's a great way to identify whether your content, message, or offer resonates with your target audience.

We'll get into the details of how to test and optimize your specific campaigns later in this guide, but it's important to make this part of your web personalization practice—not only to make your web personalization more effective, but also to fine-tune your messaging and content creation efforts for your whole organization and identify gaps.

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

CONTENT PLACEMENT

A good web personalization tool allows you to not only choose what specific content to display, but also offers 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 proactive CTA promoting a local event. We'll get into where your web personalization campaigns can go on your website later, in the "Choosing the Right Place To Serve Your Personalized Content" section.



Create a Personalized Web Experience with Content

PREDICTIVE CONTENT RECOMMENDATION

Once you're equipped with all the assets you need, this is when content recommendation engines (CRE), such as Marketo Predictive Content, come into play.

WHAT'S A PREDICTIVE CONTENT RECOMMENDATION ENGINE?

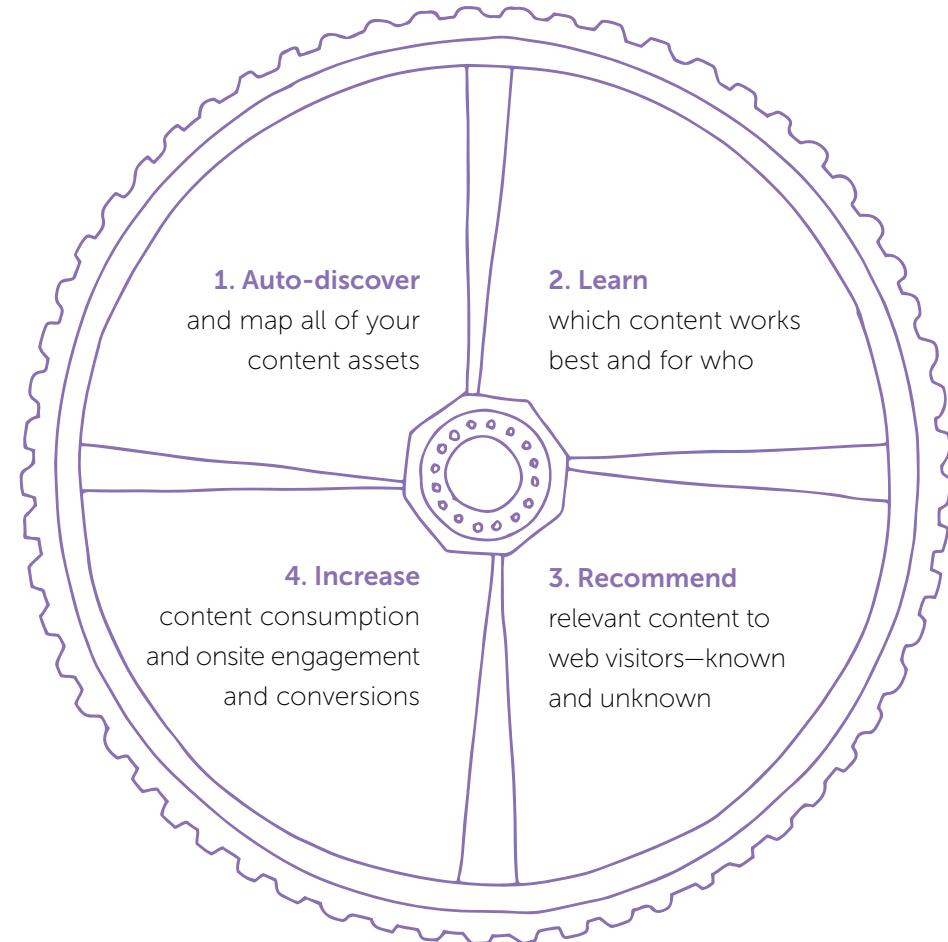
CREs do four things to help marketers deliver a successful web personalization experience:

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.

Content discovery and recommendation engines (CREs) combine the speed of real-time targeting and personalization with the insights of machine-learning and predictive analytics.

According to eMarketer, only 57% of digital marketing decision-makers are using machine learning to personalize interactions across digital channels. There is a huge amount of room for growth and for organizations to take advantage of the benefits of this incredibly personalized and targeted way to communicate with their visitors.

WHAT'S A PREDICTIVE CONTENT RECOMMENDATION ENGINE?



Create a Personalized Web Experience with Content

PREDICTIVE CONTENT RECOMMENDATION

MARKETO'S PREDICTIVE CONTENT

Marketo's Predictive Content is designed to identify visitor profile and behavior patterns and automatically discover and recommend the most appropriate content for each interaction. The content discovery engine automatically discovers all of the content assets on your site—

blogs, videos, case studies, ebooks, and more—eliminating the need for a manual inventory project. This shows you all the “inventory” you have, including the consumption performance of each content piece. Then, it leverages machine learning to recommend the right content, to the right visitor, at the right time.

Essentially, 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 accelerate

buyers further along their journey. You will still run your rule-based, targeted campaigns as usual, but the CRE will also be running in the background to supplement your campaigns with additional content to increase consumption.

The screenshot shows a mobile-style interface for Marketo's Predictive Content Dashboard. At the top, there are three circular icons (blue, orange, green) and a navigation bar with 'Mike Telem', 'Community', and 'Help' buttons. Below the navigation is a search bar with 'Search' and a magnifying glass icon. The main content area is titled 'Content Analytics' with a subtitle 'January 2016'. It features a table with columns: Title, Recommend, Views, Direct Leads, and Conversion Rate. The table lists various content items such as 'The Definitive Guide to Engaging Email Marketing', 'The Definitive Guide to Digital Advertising', etc., with their respective statistics.

Marketo's Predictive Content Dashboard analytics for a single asset

This screenshot shows a detailed view of the Predictive Content dashboard for a specific asset, 'THE DEFINITIVE GUIDE TO MARKETING AUTOMATION - WWW'. The top part displays 'Analytics' with metrics: Views (1,178), Direct Lead Conversions (402), and Conversion Rate (34.13%). Below this is a '30 Day Trend' chart showing views over time from Jan 4 to Jan 18. The bottom section is titled 'Recommendations' and shows Clicks (160), Direct Lead Conversions (41), Conversion Rate (25%), and Assisted Lead Conversions (17). At the bottom right are 'RECOMMEND' and 'CLOSE' buttons.

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

Create a Personalized Web Experience with Content

PREDICTIVE CONTENT RECOMMENDATION

Think about it this way: while a CMO at a financial services company might be underwhelmed by a general marketing whitepaper, she might be more likely to take a look at a marketing whitepaper written with her industry in mind that addresses her pain points. The CRE system also takes previous behavior into account to deliver new results with each new visit, slowly drawing her toward conversion. So in this example, after the CMO downloads a whitepaper, she may be presented with a new content asset, such as a different targeted whitepaper or webinar. Content suggestions allow you to

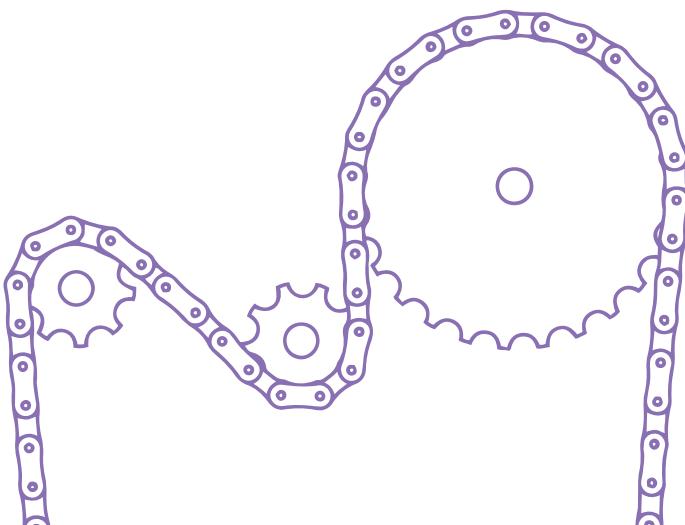
dramatically increase the value of web personalization with little effort. In this example, you can see how Marketo leverages content suggestions from its CRE engine to provide a suggestion to a blog reader.

CONTENT ANALYTICS

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

The screenshot shows a blog post titled "Break Through on Email with Easy-to-Use KPIs". The post has 19 likes, 0 tweets, 57 shares, and 5 +1s. Below the post is a photograph of a small green plant growing through a crack in a stone wall. A blue banner at the bottom of the post reads "Recommended For You: A Recipe for Lean Account Based Marketing". To the right of the post is a sidebar featuring a photo of a man named Jamie, his bio, and social media links for RSS, Twitter, and LinkedIn. A call-to-action button says "Read Jamie's Blogs".

Marketo's Content Recommendation Engine Dashboard with Content Analytics



Create a Personalized Web Experience with Content

CHOOSING THE RIGHT PLACE TO SERVE YOUR PERSONALIZED CONTENT

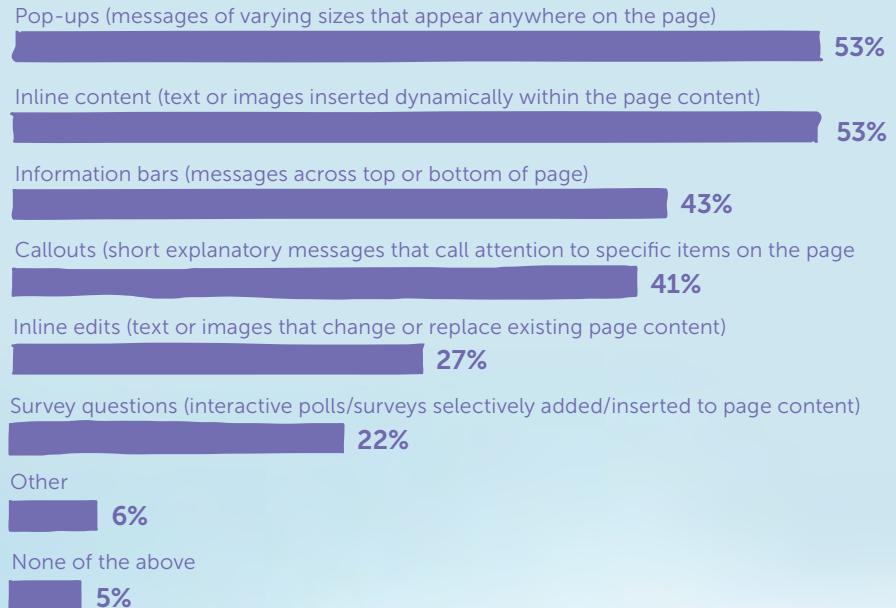
Where and when you place your personalized content in front of your targeted audience can have an impact on the overall effectiveness.

WHERE TO USE PERSONALIZATION

There is a wide range of options for where to place your content (homepage, inner page, blog, all of the above) and the actual visual to use (floating dialog, in-zone replacement, and 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/Content Used by Marketers Worldwide % of respondents

source: eMarketer, Researchscape

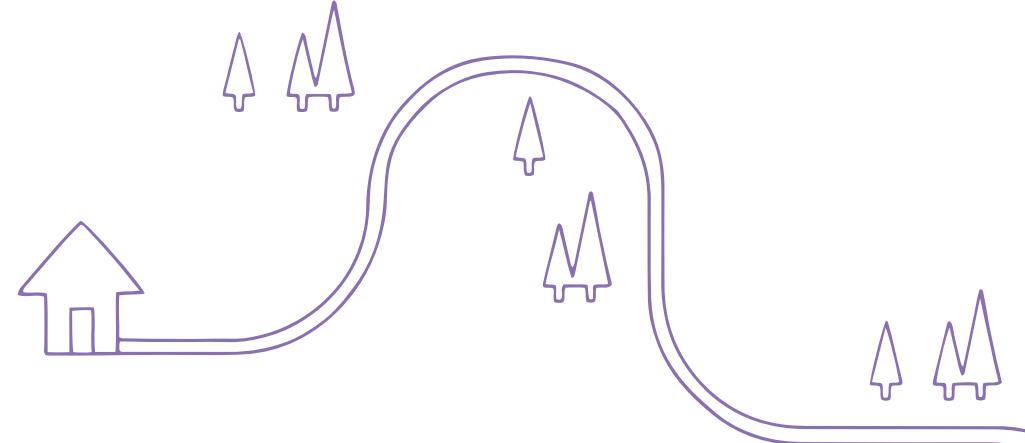


Create a Personalized Web Experience with Content

CHOOSING THE RIGHT PLACE TO SERVE YOUR PERSONALIZED CONTENT

Homepage: This personalized content sits on the homepage of your website, making the visitor's experience on your site unique upon landing on the page.

In this example, elastic—a data insights company—customizes their homepage for their visitors based on the region they are coming from.



The screenshot shows the standard elastic homepage. At the top, there's a navigation bar with links for Products, Subscriptions, Learn, Community, Use Cases, Blog, and About. Below the navigation, the title "Elasticsearch | Search & Analyze Data in Real Time" is displayed. A video player section shows a terminal window with Elasticsearch logs. To the right of the video, there's a section titled "Actionable Insight at Your Fingers" with a bulleted list: "Distributed, scalable, and highly available", "Real-time search and analytics capabilities", and "Sophisticated RESTful API". It includes "Download" and "Subscriptions" buttons. Below this is another section for "Elasticsearch 2.0 Overview and Demo" with a "Watch Now" button. At the bottom, there's a "What's New in Elasticsearch?" section with a brief description of version 2.1 features and a "Learn More" link.

Standard elastic homepage

This screenshot shows the elastic homepage tailored for United Kingdom visitors. The video player now displays a video titled "Newsroom Insights: Elasticsearch at the Guardian". The "Watch Now" button is highlighted with a purple border. The rest of the page content remains the same as the standard homepage, including the "Actionable Insight at Your Fingers" section and the "What's New in Elasticsearch?" section.

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

This screenshot shows the elastic homepage tailored for visitors from German-speaking countries. The video player now displays a video titled "Grid Monitoring at CERN with Elasticsearch, Logstash & Kibana". The "Watch Now" button is highlighted with a purple border. The rest of the page content remains the same as the standard homepage.

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

CHOOSING THE RIGHT PLACE TO SERVE YOUR PERSONALIZED CONTENT

Inner-page: Placing personalized content on the subpages of your website allows you to offer your 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 and one relevant to their previous searches. Being able to personalize wherever a visitor might land is therefore essential. For example, if a visitor lands on a product page, with web personalization you would be able to show the visitor a video that is relevant to them, based on their industry or gender, or any other attribute.

Landing Page: Like a personalized web page, a personalized landing page that offers your visitor something or aims to convert them can make a big difference. This is especially true when it comes to optimizing your digital advertising or email marketing efforts. After delivering a highly targeted advertisement or email, driving your

visitors to an un-personalized page makes them feel disconnected. However, a page that can continue 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 various segments, depending on the email or ad that drives prospects to it. Therefore, it is effective to further personalize them based on key attributes of your visitors.

Good web personalization tools let you choose to display ads on one or all of the options listed before, in which case, personalized content will be presented to a visitor wherever he might land in your site, using widgets or other visuals that look appropriate across site.

Beyond that, you are also able to place your content on different areas of the page, some being more interruptive and others being relatively unobtrusive to the overall website experience. Here are some of the most common ways to personalize on a page:

Dialog: This is an overlay box that comes up in the middle of the page or on one of its sides and corners, while the rest of the page fades in the background (optional). This is a great option when you really want to capture a visitor's attention because

it immediately interrupts the visitor in the middle of their path to your site. You want to reserve these for high-value, high-importance offers because there is a possibility that a visitor does not respond well to the interruption and then bounces out.



Dialog box example



Create a Personalized Web Experience with Content

CHOOSING THE RIGHT PLACE TO SERVE YOUR PERSONALIZED CONTENT

In-Zone: An in-zone personalized experience happens when the personalization platform replaces a specific area or zone of the site. Many of these zones are identified by DIV tags, that almost every website has, making it very easy for the marketer to choose different ones to swap for different cases.

In-zone Personalization Example: The before and after of in-zone personalization.



Image A: In-Zone section of website without personalization and with original content



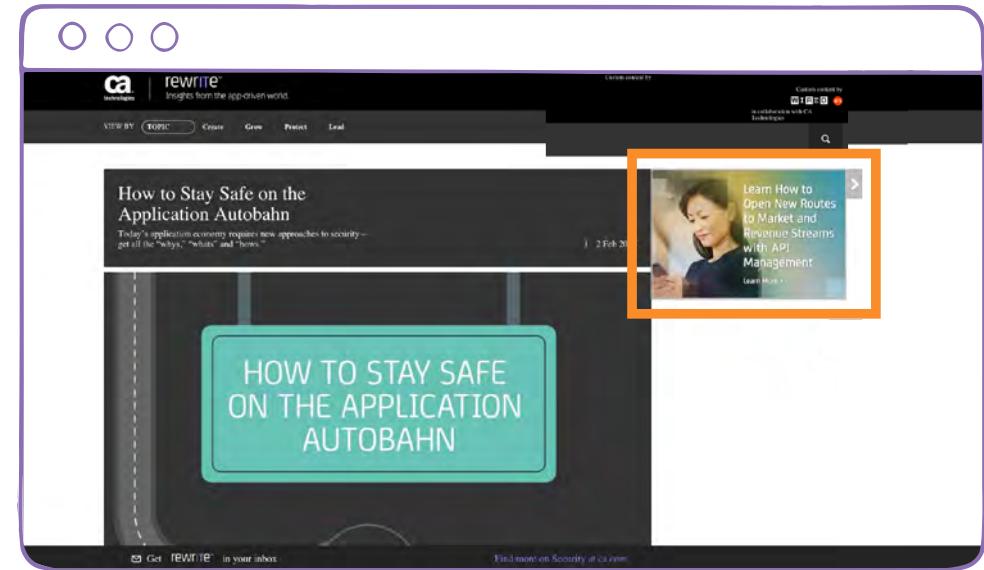
Image B: In-Zone section of website personalized with content specifically for "companies with a mobile app"

Create a Personalized Web Experience with Content

CHOOSING THE RIGHT PLACE TO SERVE YOUR PERSONALIZED CONTENT

Widget: Similar to the dialog personalization, widget personalization appears as a user navigates the site; however, it slides out on either the left or right side of the page. From a visitor experience perspective, this provides an unobstructed view of the page while also offering them personalized content. There is also an option to have the widget almost disappear and yet remain available for the visitor to review all throughout their visit. In this example below from CA Technologies—an IT management software and solutions company—you can see the widget on the right appears on designated pages that offer articles specifically on security.

Redirect: You may find that you have a segment that you only want to see specific content or perhaps a mini site tailored for that audience. Web personalization can help with that too by quickly identifying them and taking them to a page or mini site that's built specifically for them, with the products and messages that are relevant to them. With a redirect, the visitor never reaches the original page they navigated to; instead, they are identified based on their targeted characteristics and taken to a page that is more relevant to them.



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

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)

TESTING AND OPTIMIZATION



Testing and Optimization

A/B TESTING

A/B Testing

By testing your personalization efforts, your website personalization becomes one of the most powerful tools in your marketing arsenal. It provides real data on how web personalization makes a difference on your site and to your visitors by pointing out which content assets or calls-to-action have the greatest impact on specific audiences.

Testing is an important element of creating a successful web personalization strategy and campaign. By using A/B testing, it is easier to optimize your web personalization campaigns for greater ROI.

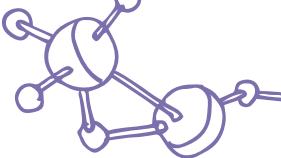
A/B testing is created to be inherently simple—you are only testing one single variable at a time. This makes it easier to form actionable conclusions. By assessing the actions of buyers, A/B testing reveals what truly appeals to them. In doing so, it also advances visitor engagement, campaign effectiveness, and marketing expertise. A good web personalization tool allows you to A/B test for specific segments and audiences rather than to your whole audience, which makes the results more relevant.

WHAT IS A/B TESTING?

A/B Testing, also known as split testing, compares two or more versions of the same campaign or message on a certain channel so you can determine what is working and what isn't.



A/B TESTING



WHY IS A/B TESTING IMPORTANT?

1. A/B testing increases engagement with customers:

The goal of A/B testing is to improve interactions between buyers and brands by uncovering which campaign variations resonate the most with the target audience. Since this type of testing applies to everything from more engaging personalized emails to social networks, it opens up all channels to stronger communication.

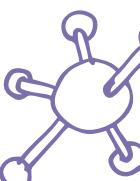
2. A/B testing enhances campaign effectiveness and optimizes programs for a company's target audience:

By trying out different combinations for a specific group of customers, marketers can eliminate elements that alienate users, drive visitors away, or have no effect on conversion rates whatsoever. In addition, all audiences do not respond identically to a single campaign, so by testing different versions, marketers can identify which ones work best for specific segments.

3. A/B testing enhances marketers' awareness and expertise of audience preferences:

A/B testing provides businesses with enormous amounts of data on audience behavior. The more tests marketers run, the more robust their understanding will be, and they can begin to make more intuitive choices in their marketing.

A/B test, the better insight you have for your next campaign. Create more than one version of a campaign for each segment, so that you have a basis for comparison. Each campaign might include different CTAs, different content for each stage of the buyer journey, and even unique ad targeting. But, be sure to only test one element at a time so your conclusions are clear and easy to draw. Many web personalization tools can help by automatically performing your A/B testing with minimal setup.



SET UP MULTIPLE CAMPAIGNS

There are several components to any campaign, and it's possible to run A/B tests for all of them. The more you

ebook | Healthcare ...

SEGMENT: Healthcare
A/B GROUP: Healthcare
PRIORITY SCORE: 1

Whitepaper | F&S He...

SEGMENT: Healthcare
A/B GROUP: Healthcare
PRIORITY SCORE: 1

| Campaign Type | Segment | A/B Group | Status | Label | Impressions | Clicks | Clickthrough Rate |
|---------------|------------|------------|----------|------------|-------------|--------|-------------------|
| ebook | Healthcare | Healthcare | Launched | healthcare | 163 | 1 | 1% |
| Whitepaper | Healthcare | Healthcare | Launched | healthcare | 139 | 1 | 1% |

An example of healthcare campaigns being A/B tested and their metrics within Marketo's Web Personalization app

Testing and Optimization

A/B TESTING

WHAT TO TEST

When it comes to A/B testing your web personalization campaigns, you can test almost anything. With that being said, here are some general areas to consider and pursue:

Messages

- Which message and/or copy resonated the most with your target audience?
- Test different messaging for new vs. returning visitors.
- Create seasonal or location-based offers and test them on visitors living in specific locations.

Promotion Location

- Which visual impacted the most conversions? Dialog, in-zone, or widget?
- Page location: Where in a page is it best to personalize for a specific type of campaign—the main banner, the boxes below it, or the sidebar?
- Test different page designs for new vs. returning visitors.

Calls-to-Action (CTAs)

- Buy now? Purchase? Download? Learn more? Change your CTA text on your buttons to see which word or phrase converts the most visitors.
- Vary the location of your CTA button—make some more prominent than others.
- Test different colors, shapes, and sizes of images for CTA 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. Do users prefer your content to be part of the page or on a pop-up? Do you see higher success if they stay on the same page or if you have them navigate to a more specific page?

Copy

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

Visual Media

- Test different types of imagery—people vs. products and photos vs. 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

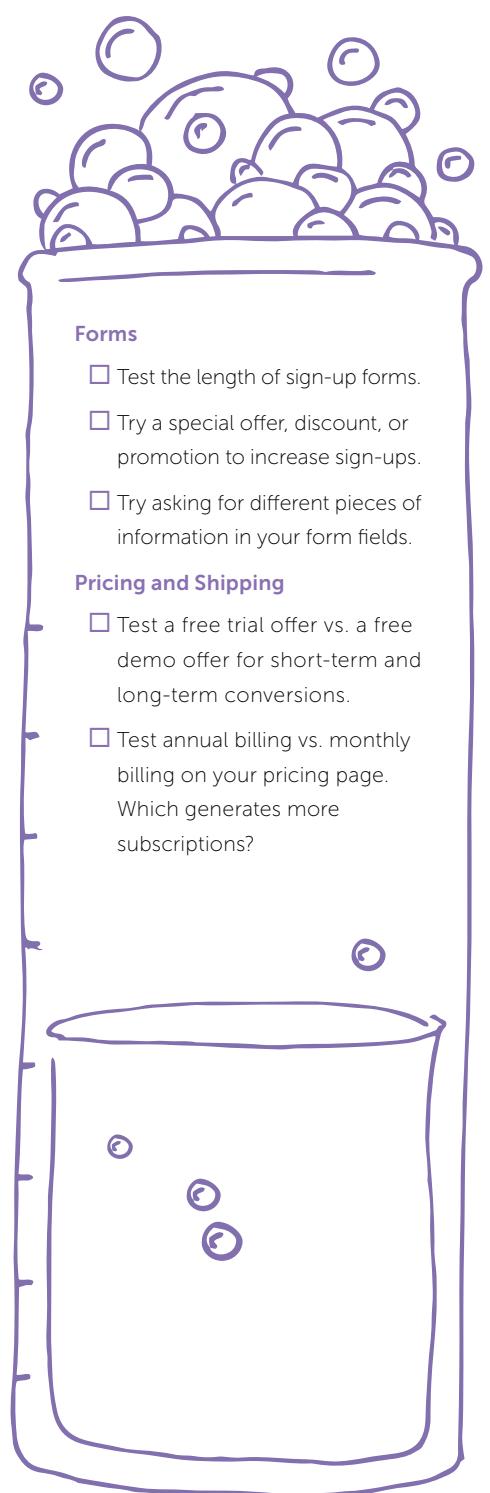
- Test the order of the menu items in your site navigation.
- Test the display of your navigation bar. Do visitors prefer a horizontal or vertical orientation?

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 vs. a free demo offer for short-term and long-term conversions.
- Test annual billing vs. monthly billing on your pricing page. Which generates more subscriptions?



A/B TESTING

SEE WHAT WORKED BEST

Keep track of the insights gleaned from your A/B tests and keep this data in mind for your next web personalization campaign. Continue to utilize A/B testing with each of your campaigns so you can measure and improve your campaigns over time.

You know the drill; without A/B testing, you'll never know what works (and what doesn't) or what might work better in your personalization campaigns. So, what kind of metrics should you be examining up close? Tools like Marketo's Web Personalization automatically track five key metrics when it comes to testing:

Impressions/Views:

Impressions are the number of times your web personalization campaign is displayed to different visitors, whether it is clicked on or not. Based on your targeting and configurations, customers may see multiple impressions of the same campaign.

Clicks:

This is simply the number of times your personalized web campaign gets clicked on. Note: 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.

Click-Through Rate:

Click-through rate (CTR) is a measure of the efficiency of a test or web personalization campaign. It is the percentage of clicks to impressions and is a metric that marketers can use to compare the performance of different campaigns. For example, if a marketer runs 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, the CTR of each of these campaigns is a metric that the marketer can compare with: to identify which campaign performed better. So if the

CTR = Clicks/Impressions

campaign was seen 100,000 times (impressions) and 100 users clicked it, the CTR is $100/100,000 = 0.01$ or 1%.

Leads Generated:

In B2B, leads generated is one of the most important measurement points. It counts the amount of leads that converted following a successful web personalization campaign. This might occur when promoting gated content that requires visitors to fill out a form to download or even when promoting ungated content that is convincing enough that the visitors then choose to contact you.

Revenue/Purchase:

More typical to consumer and e-commerce sites that sell via the web, marketers can measure the direct impact of their personalization campaigns on online purchases. Some results show the click-to-buy flow, while others impact buying behavior by simply displaying content that isn't necessarily clicked (such as improved shipping terms for a given location).

HOW LONG SHOULD YOU RUN AN A/B TEST?

At Marketo, we run our web personalization tests for about 2-4 weeks to reach statistical significance (the length of time depends on how much traffic the site gets). But 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's reached statistical significance, the tool will start only running the winning test.

SPOTLIGHT

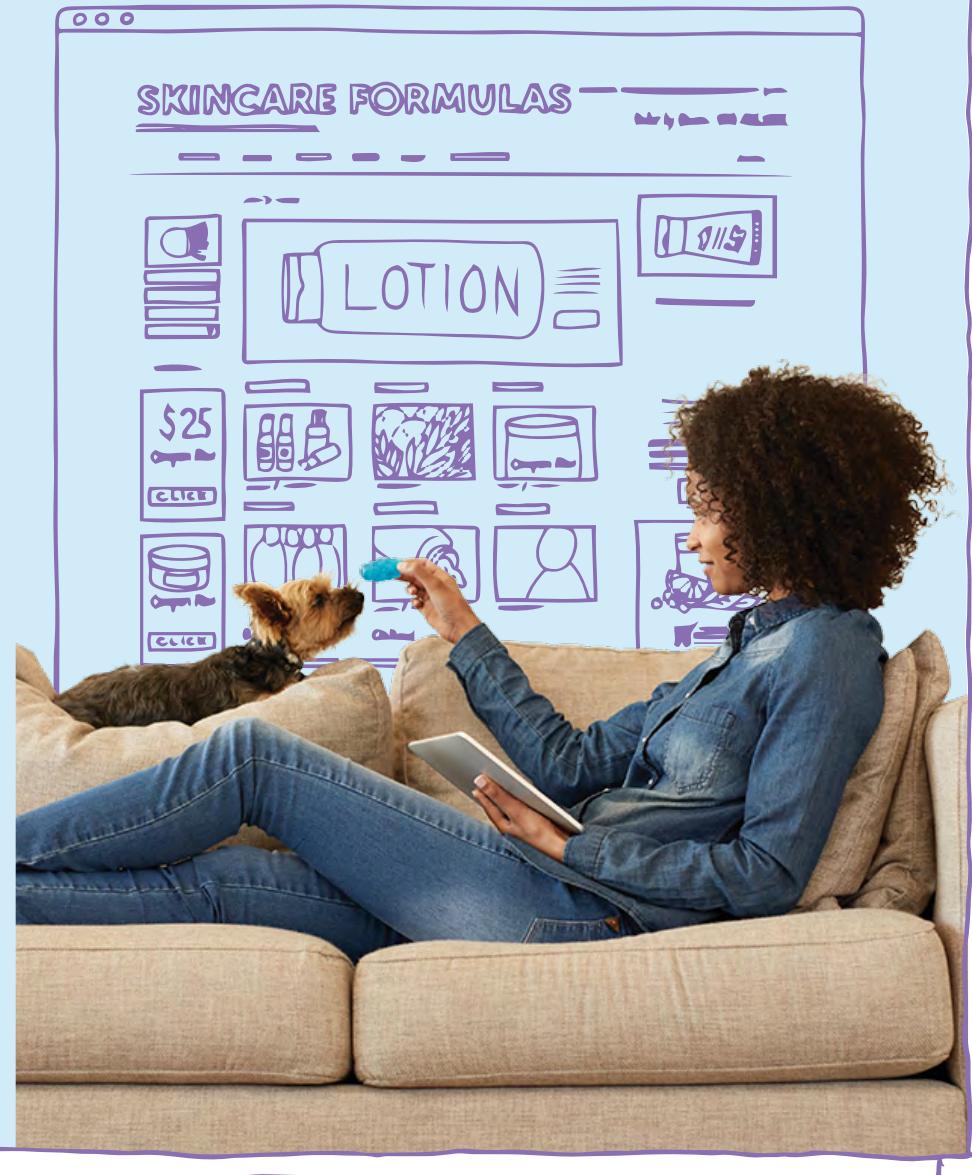
Predictive Optimization

A predictive content engine is constantly working to optimize how content is served to your website visitors. This engine is effectively an automatic multivariate A/B test done over and over again every time you have a website visitor.

Predictive content recommendation engines test assumptions and make evidence-based conclusions to deliver the most relevant results. In Marketo's Web Personalization tool, for example, this type of optimization is backed by complex algorithms and machine learning, rather than trigger-based content offers.

A complex tool with predictive optimization is actually very easy to use as it's almost 100% automatic apart from some configuration options and helps marketers achieve the most effective results much faster than a manual testing process.

While predictive optimization is generally an automatic process, there are still lessons that you can learn from it. It might highlight content gaps that you have or help you realize that while you promote a specific type of asset more, another type does very well organically. Use the learnings you gather from the predictive content recommendation engine to help you calibrate your content creation.



A/B TESTING

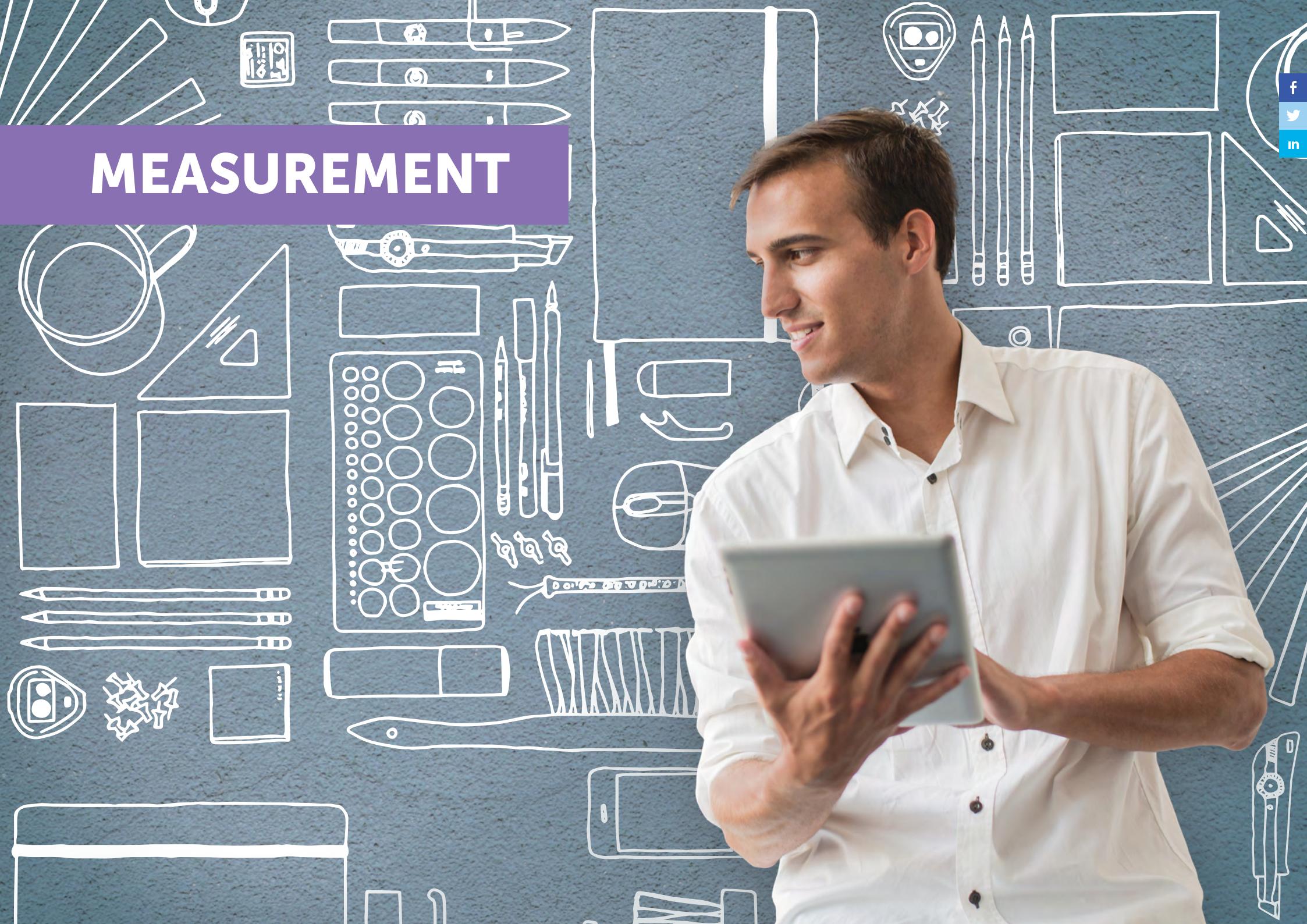
INTEGRATION WITH ANALYTICS TOOLS

A good web personalization tool will integrate seamlessly with other technologies, allowing you to get a full and robust view of your customer. These integrations can provide a symbiotic effect on the technologies, enhancing each other's capabilities. For example, Marketo's Web Personalization tool integrates with both Marketo's marketing automation platform and its features, including Marketo Ad Bridge and Google Analytics. In both cases, web personalization augments the data of the original platform, fine-tuning the understanding of customer activities across channels and benefitting from the data flowing from these platforms.

Additionally, integration with popular web analytics tools, like Google Analytics and Adobe SiteCatalyst, allows marketers to enrich those platforms with firmographic data to enable better reporting and advanced slicing and dicing of data.



MEASUREMENT



3 LEVELS OF MEASUREMENT

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

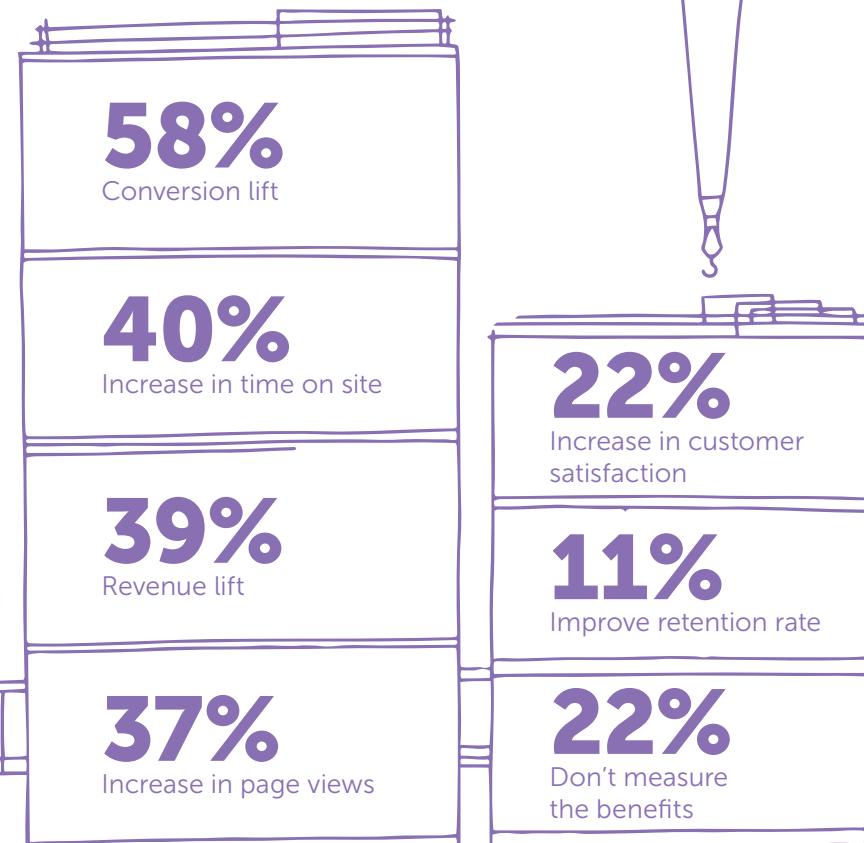
Based on the goals you set for your web personalization efforts, there are some standard early, mid, and late-stage metrics that you may want to track.



How do marketers measure web personalization?

% of respondents

Note: n=90; among those who use real-time personalization; *data-driven personalization completed in less than 1 second.* Source: eMarketer, Researchscape 2015



3 LEVELS OF MEASUREMENT

1. EARLY-STAGE METRICS

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

- **Time on Site:** This is the next step beyond the time on page metric as it tracks the entire length of time a visitor is on your site—across multiple pages.

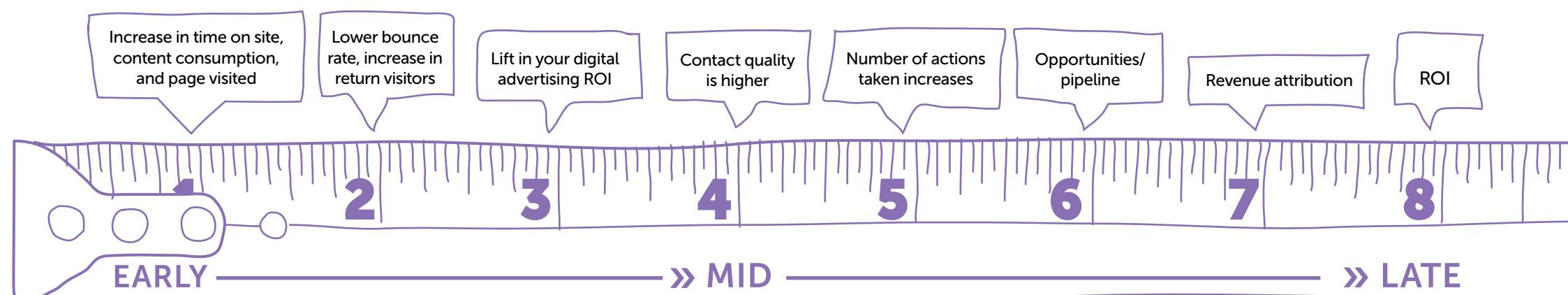
- **Visitor Frequency:** This metric tracks how many times in a specific period (you can determine the period) the same visitor comes to your site. Revisiting a website is usually a good indicator of interest.

- **Content Consumed/Pages Visited:** The content consumed or pages visited indicates a level of engagement and self-education or research. The goal of most websites is to engage their visitors, so having your visitor consume more content and visit more of your site is a good indicator.

- **Volume of Known vs. Unknown Visitors:** While this metric doesn't show engagement, it is an interesting metric to track as a trend over time. The volume of your known versus unknown visitors over time can show you the opportunity and potential reach you have with a tool like web personalization.

- **New vs. Returning Visitors:** This metric allows you to see the mix of visitors coming to your site and helps you shape your web personalization strategy—i.e. where in the buying journey you will get more value from personalization.

- **Time on Page:** This tracks the amount of time a specific visitor spent on an individual page. A longer period of time generally indicates a higher interest or engagement level and is considered a positive indicator. This is closely related to time on site.



Web Personalization Metrics—From Early to Late

Measurement

3 LEVELS OF MEASUREMENT

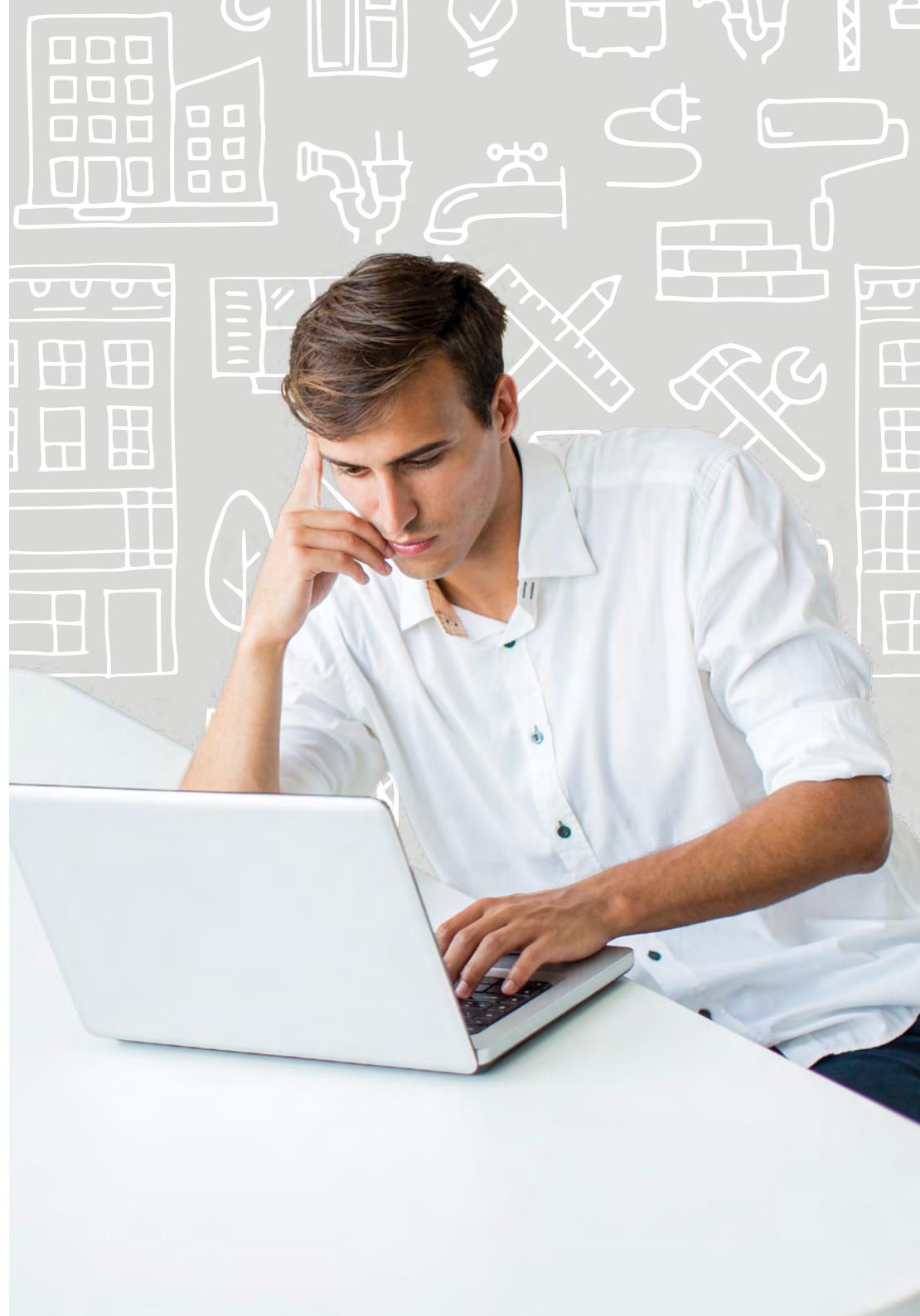
2. MID-STAGE METRICS

Mid-stage metrics, also known as conversion, are more focused on getting the right visitor to engage and become a contact in your database. Finding more of the right kinds of visitors is a key advantage of web personalization and therefore something that organizations should track and measure. Let's look at some common mid-stage metrics:

- **Actions Taken:** When a visitor comes to your site and fills out a form—whether that's for a content asset, coupon, or mailing list—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 metric of success.

- **Contact Quality:** Are the people visiting your website and taking action 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 looking for and targeting. Are you seeing an increase?

- **Lift in Digital Advertising ROI:** Your digital advertisements target and retarget visitors across the web. With web personalization, you are able to personalize the pages they land on. Track if there is a lift in the conversion rates from these pages.



Measurement

3 LEVELS OF MEASUREMENT

3. LATE-STAGE METRICS

Late-stage, or revenue-oriented, metrics give marketers insight into how marketing activities specifically impacted revenue and allow them to see the ROI of their activities. Not only does web personalization generate its own ROI, it's important to consider its impact on other programs—does it make your advertising more effective? This cannot only show value for your web personalization activities, but can help you see higher ROI across other channels and help you make budget allocation decisions. Some late-stage metrics that you may want to track include:

- **Opportunities:** While this is a B2B-centric metric, it illustrates how web personalization activities fill the pipeline with sales opportunities. Aside from sales revenue, this is one of the most powerful metrics to show the ROI of your web personalization efforts.
- **Revenue Attribution:** This metric is the consumer equivalent of opportunities—it demonstrates what revenue came as a result of your web personalization activities, mainly on site purchases and, when applicable, immediate offline purchases such as contacting a sales center.

SHOW REPORTS TO SALES

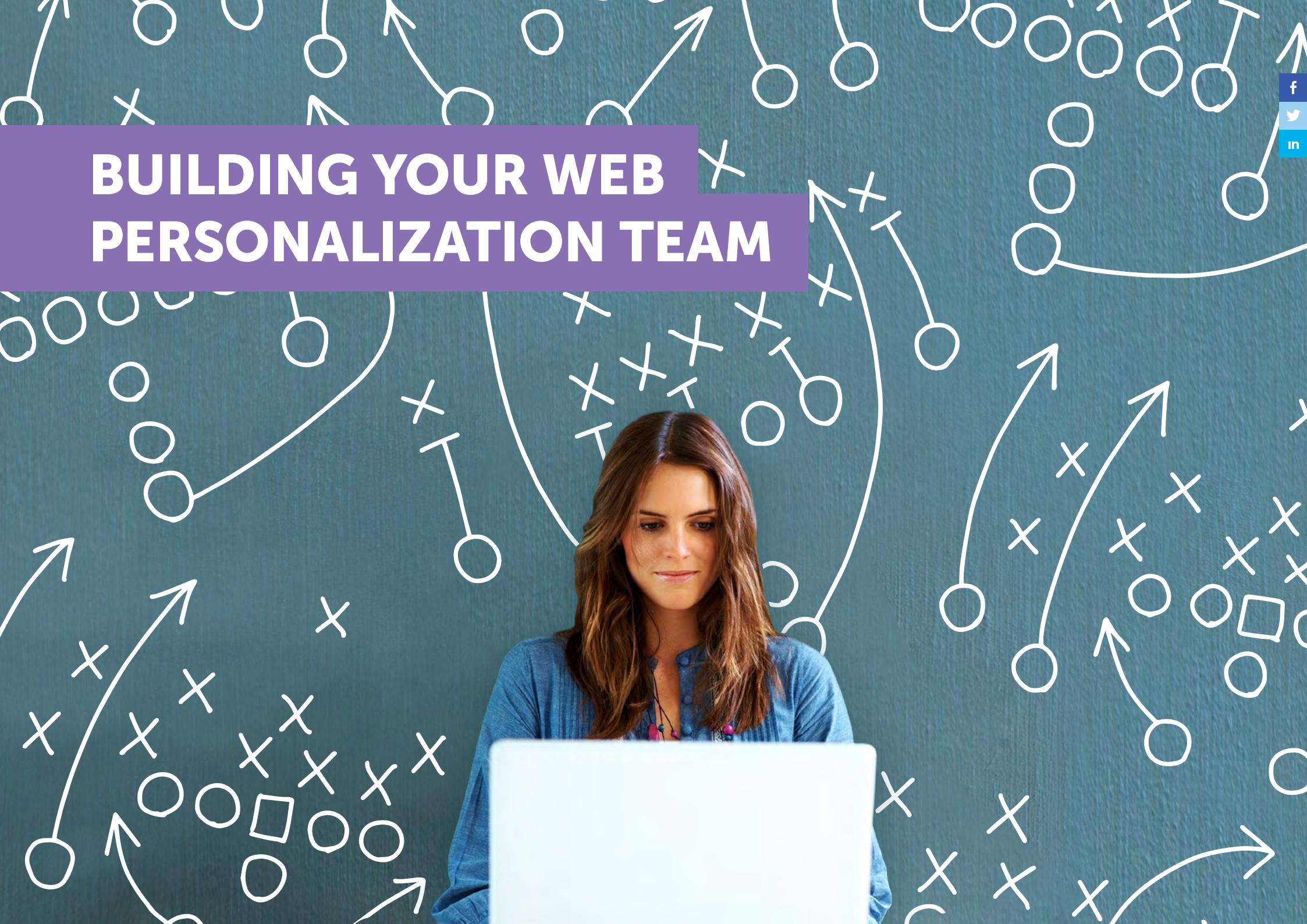
If you're in a business that operates with a sales team, at some point you'll need to turn over these primed accounts to them to help you turn your engaged contacts into closed sales. To begin this transition, start putting together reports from your web personalization campaign.

Key Organizations from Sales Territories: Once the campaign has been up and running, are certain organizations showing more interest in your company than others? Are these organizations a good fit for your company?



Key Leads Coming from Sales Territories: Are there specific decision-makers you located in sales territories? Be sure to 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.



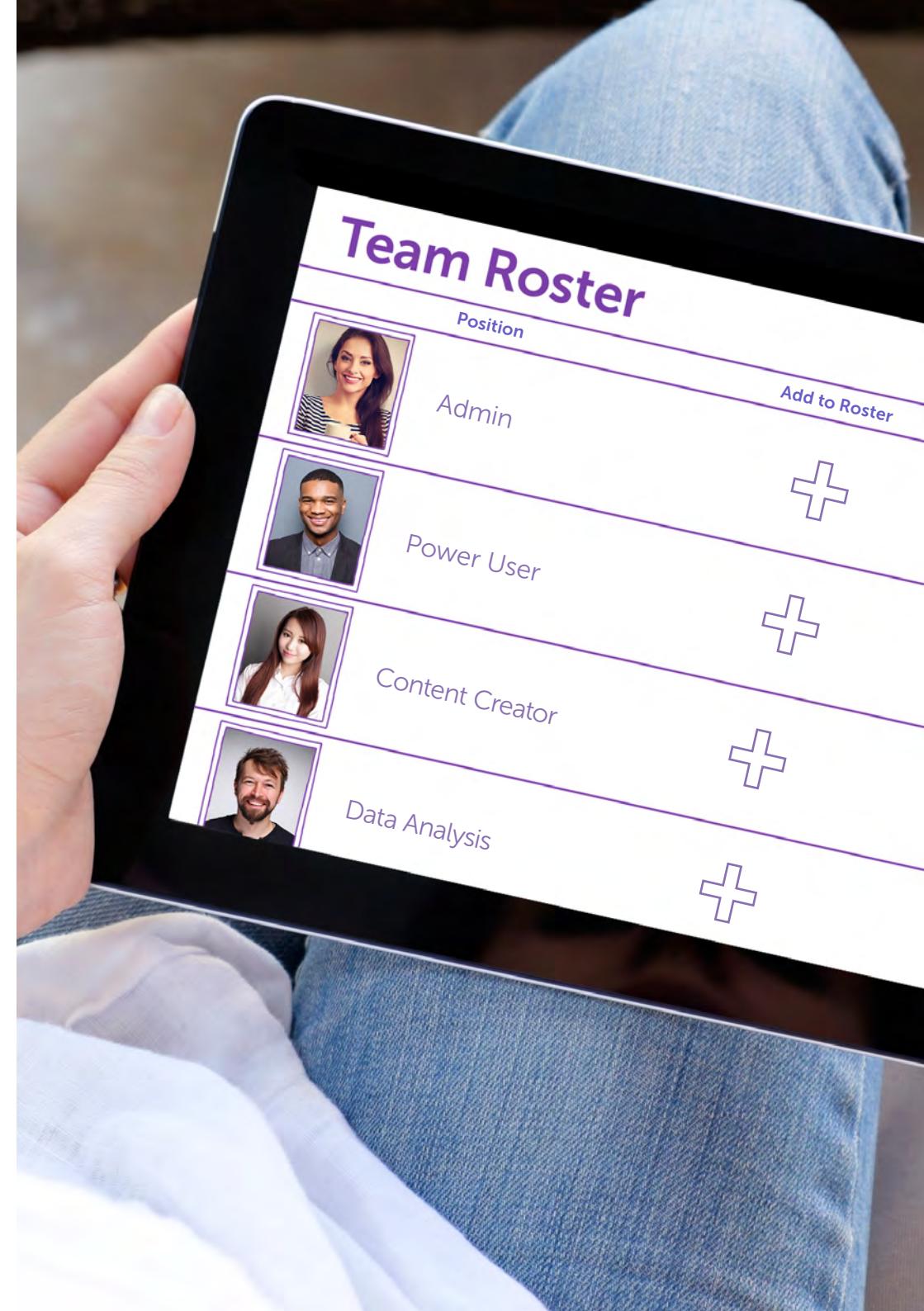
BUILDING YOUR WEB PERSONALIZATION TEAM

Building Your Web Personalization Team

WHAT DOES IT TAKE TO RUN WEB PERSONALIZATION

Your web personalization marketing starts with creating a strategy that addresses and supports your organizational marketing goals. Then, you need to actually implement it—and for many organizations, this requires identifying the resources you need.

Web personalization tools, like Marketo's, can be a simple deployment and, based on the tool, may be able to integrate seamlessly into your existing marketing automation platform. Understanding how you want to deploy a web personalization tool will help you identify how to allocate the people and resources needed to manage it. Because of the variety in organizations' sizes, we separated our guidelines based on whether you have a small (1-10) or medium/large (10+) marketing team so that you can determine the best way for you to structure your web personalization team resources.



Building Your Web Personalization Team

WHAT DOES IT TAKE TO RUN WEB PERSONALIZATION

A few items that can take up resources when you are implementing web personalization that you may want to consider are:

- **Content:** If you don't already have existing content, you may want to develop it. If you do have existing content, but it needs to be repurposed for specific, targeted audiences—consider who will do this and on what timeline. With smart repurposing, creating content often does not take much time.
- **Technical Ability:** The standard web personalization tool deployment does not take much technical skill. For implementation, it's as simple as adding a snippet of JavaScript to your website, similar to when you deploy Google Analytics. No coding or HTML skills are required.
- **Marketing Automation:** If you are already using marketing automation, you probably already have the relevant skill set to support web personalization, and in many cases the same people deploying marketing automation will be the ones using web personalization. If this team is already overloaded, you might need to add a resource to them.
- **Existing Activities:** Typically, web personalization becomes part of your current audience targeting and existing campaigns and promotions. This means that most of the underlying logic of who to target and what to say to them, including the content, images, and messages themselves, already exist and can be reused. For example, your next event promotion typically already has an email invite with relevant text and images, a landing page, and a targeting criteria, so there isn't much additional work required to deploy it on your site with web personalization.
- **Number of Concurrent Programs:** The number of different offers, promotions, and different target audiences will obviously impact the resources you will require. While the possibilities are near endless, it doesn't mean you have to have a hundred campaigns running on day one. You have to walk before you run—start small and build your campaigns as your team, or capacity, grows.

GET STAKEHOLDER BUY-IN

The first step in executing a web personalization strategy for your organization is assembling a cross-functional team of stakeholders to vet your plan and agree on the objectives and metrics of success. Based on your organization's structure, it's important to achieve the buy-in of your executives by illustrating how web personalization fits into and supports your organizational marketing goals.

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

Building Your Web Personalization Team

SMALL- TO MEDIUM-SIZED TEAMS

With a small or medium-sized team, you know that with any activity you take on, you need to be resourceful to cover as much ground as possible without stretching your team too thin. With a small team, you are forced to focus on the tasks that matter the most in carrying out your web personalization strategy and meeting your goals. So with limited resources, how you divvy up web personalization responsibilities really depends on your marketing organization's structure. Here are a few roles that we think a small- to medium-sized team may want to consider:

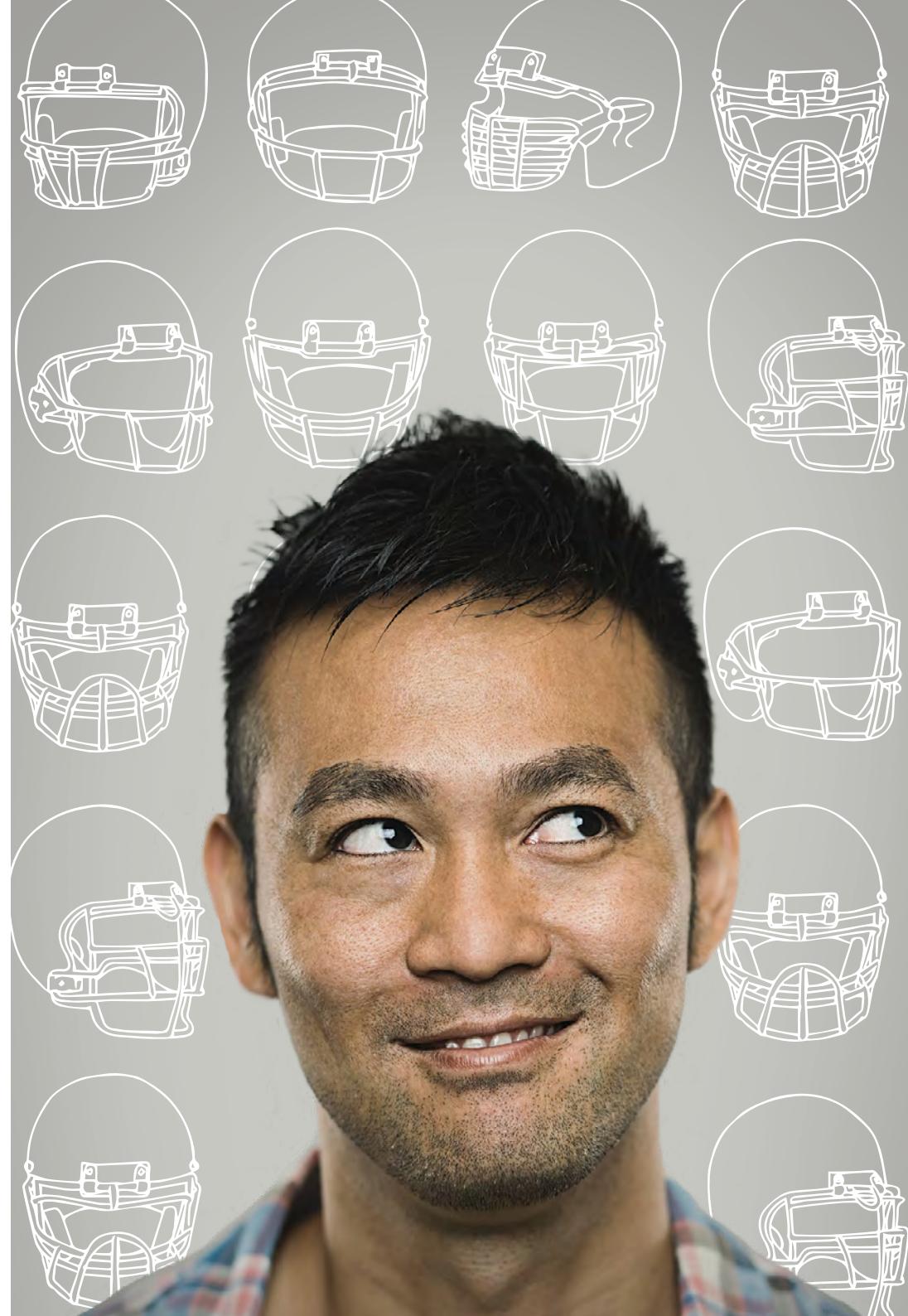
- **Admin/Web Personalization Champion:**

Champion: On a team with very limited resources, this might be the only role that you have. This person could wear many hats and their day-to-day role may be to manage different aspects of marketing—like parts of your customer lifecycle or various marketing channels, where web personalization is just one of the programs or channels they work on. This person is the champion for

driving a web personalization strategy at your organization. Often, they act as the centralized admin for the tool itself and understand the tool inside and out. Depending on the size of your team, this might also be the person who executes and reports on its success. In many cases, this person won't need to dedicate more than a couple of hours a day to running and maintaining web personalization.

- **Power User:** These may be marketers in other roles, for example, a field marketer, who runs their own cross-channel program.

Power users understand how to use the tool—including how to add their segmentation, create campaigns, and measure their success on web personalization and as a part of their overall cross-channel marketing effort.



Building Your Web Personalization Team

SMALL TO MEDIUM-SIZED TEAMS

- **Creative Services:** You may need to tap into your creative services resources in order to get the personalized visuals you need to coordinate with your personalized content and offers. If you plan your campaigns and offers in advance, this can come as a bundle of requests and be completed all at once.
- **Content Creator:** While 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 very 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 comes in handy—saving time and making sure your content has the correct messaging for your audience.

The bottom line is that most SMBs have one or two people focused on web personalization and are able to show great results, even though neither of them is fully dedicated to that task but rather handles it 20-40% of the time.



SPOTLIGHT

Do I Need a Web Developer?

The best web personalization tools offer a quick and easy implementation—as simple as adding a line of JavaScript to your website—similar to Google Analytics and therefore, need no development knowledge or help whatsoever.

In some cases, depending on how you want to use 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 it often means you have the ability to test and do richer optimization for your target segments. You also may have more audiences, products, territories, and business units to serve.

In large organizations, there are two main ways web personalization is handled:

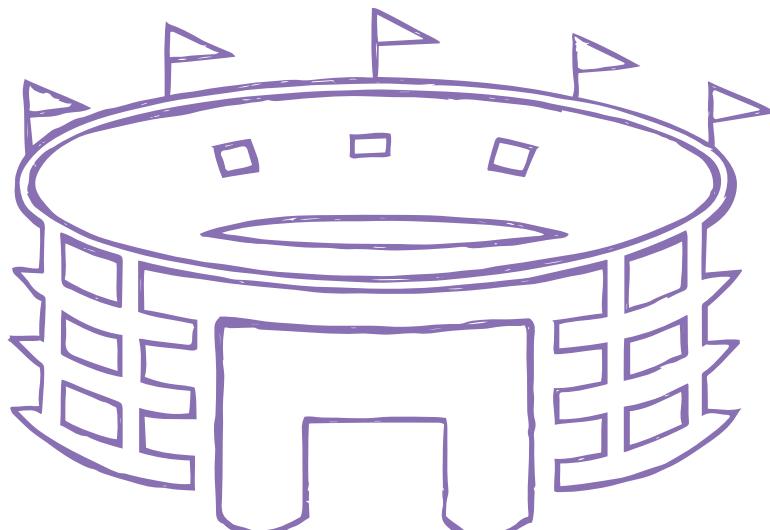
1. Each business unit or territory has almost full independence running their own programs, sometimes without much more than basic central governance and sometimes even on separate instances.

2. There is a stronger central team that provides campaign services to the business units based on their requirements. The business unit's focal points can review results and approve

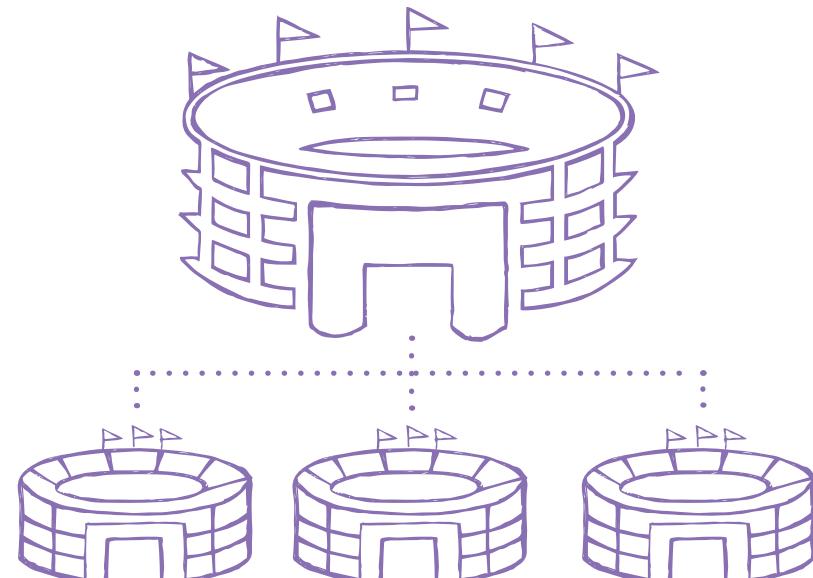
visuals, but not launch campaigns. While this method relies heavily on the existing structure of your marketing team, it is sometimes more suitable, since there is typically one site that hosts all products and receives traffic from all audiences.

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. Because you have the ability to invest in additional people, it's a good idea to make sure that the following responsibilities are covered:



Each business running their own programs



A central team that provides campaign services to the business units

Building Your Web Personalization Team

LARGE TEAMS

- **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. This role is responsible for educating the marketing team on the capabilities and benefits of web personalization. Additionally, they should understand the marketing activities across the board and determine if there are opportunities to implement web personalization to make an incremental impact.

- **Data Analysis:**

Data is always there for the taking, but there's not always someone to devote time to it. 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 accordingly. While the auto-tuning and content recommendation elements of your web personalization tool add an automated element to making these decisions, having someone dedicated to diving into the data

injects higher ROI into your web personalization efforts. In many cases the Data Analyst is responsible for analyzing various channel performance—web, email, paid, and social—and the interaction between them.

- **Cross-Functional Power Users:**

Unlike on a small team, on a large team, you may have many 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 an optimized web experience for a specific segment or audience within their campaigns.

- **Content/Developer/Design:**

As your web personalization scales across your organization, so will your demands for unique designs, targeted content, and specialized web personalization campaigns. Each of which will require resources from their respective teams or even an individual responsible for that on your web personalization team.





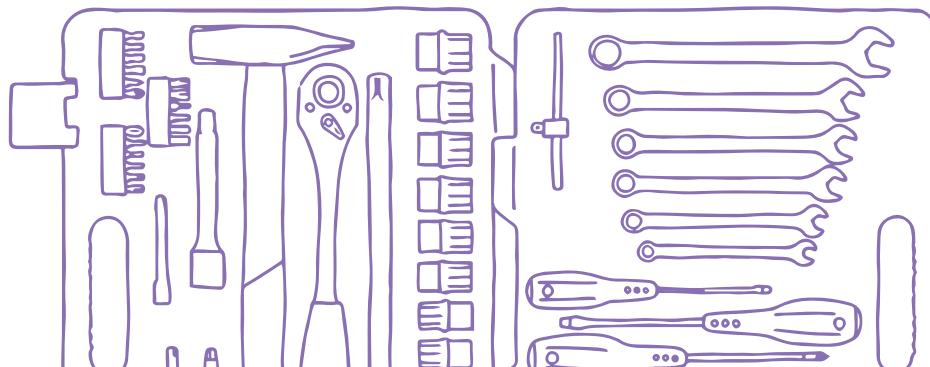
BUILDING YOUR WEB PERSONALIZATION TOOLBOX

DO YOU NEED A WEB PERSONALIZATION TOOL?

As we covered throughout this guide, web personalization is a critical component of how you talk to customers as individuals and with relevant messages. If you're not using web personalization as a part of your marketing mix, you're missing out.

A web personalization tool is necessary if you want to make web personalization a seamless part of your marketing programs. In fact, according to eMarketer, more than 85% of marketers who use a web personalization tool that incorporates real-time capabilities are satisfied with their tool. Implementing a web personalization tool allows you to spend time planning strategic campaigns, rather than assembling the right people and resources to execute all the technical details.

If you are already marketing to a set of segments or personas across your other marketing channels, and you have a website and a few offers or pieces of content, you have what it takes to get started with web personalization. So why wouldn't you? As we demonstrated throughout this guide, web personalization is a low-risk, high-reward marketing activity that many marketers haven't utilized. If you're ready to get started, in the next section we'll explore what to look for in a web personalization tool.



ANY CMS. ANY CONTENT. ZERO IT.

An intelligent web personalization solution requires zero IT implementation or management, and simply clicks into place with your existing content management system (CMS), allowing you to access even more information and feedback on your content marketing. You simply leverage your current CMS and existing content—it's that easy.



WHAT TO LOOK FOR IN A WEB PERSONALIZATION APP:

Use this checklist as a tool to help guide you to a complete web personalization tool and set your team up for success:

| Targeting | | YES |
|--|--|-----|
| Targets both anonymous and known visitors | | |
| Can target based on location | | |
| Territories | | |
| Countries | | |
| States | | |
| Cities | | |
| Zip codes | | |
| Can target based on behavior | | |
| Search terms | | |
| Referrals | | |
| Pages viewed | | |
| Number of visits | | |
| Can target based on contact data | | |
| CRM data | | |
| Lead/contact data from marketing automation | | |
| Can target based on firmographics | | |
| Company names | | |
| Industries | | |
| Size | | |
| Revenue | | |
| Can target based on predictive models | | |
| Supports account-based marketing | | |

| Technology | | YES |
|--|--|-----|
| Built on, or deeply integrated with, a marketing automation platform | | |
| Connects to ad networks for visibility into digital advertising engagement and nurturing | | |
| Applies big data and analytics to deliver predictive content recommendations | | |
| Auto-detects content and analyzes content performance | | |
| Does not require coding or technical knowledge | | |
| Provides campaign prioritization | | |
| Provides optional APIs | | |
| Supports segment-based A/B testing | | |
| Supports responsive design | | |

| User Interface | | YES |
|--|--|-----|
| Easy to use and intuitive, designed with the user in mind | | |
| 1. Provides value quickly—leaves the effort in planning, not executing | | |
| 2. Out-of-the-box connectors to lead data | | |
| 3. WYSIWYG editors for segment and campaign creation | | |
| 4. Thorough analytics | | |
| 5. Web, email, and mobile reports (real-time and scheduled) | | |



CONCLUSION

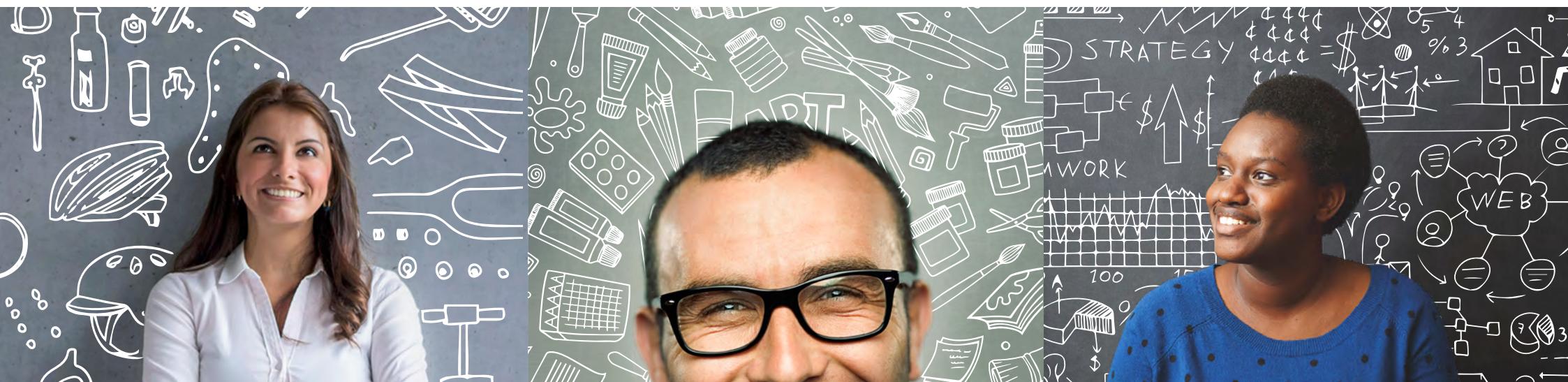
Web personalization empowers you to provide more relevant experiences to your online visitors and speak to them with personalized messages at scale. The data is undisputable—consumers and decision-makers expect companies to know them and to offer personal experiences; and for companies, personalization is proven to be more effective at doing this.

Web personalization is valuable at every stage of the customer journey and can be implemented for unknown visitors as well as for longtime customers. Most importantly, it 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. Web personalization can be implemented with systems you already have in place and can leverage content you already have.

In a digital marketing landscape that is becoming increasingly competitive, being personal, relevant, and timely is vital for your company to differentiate itself and prove to customers that you have the right

products and services for them. Web personalization is how marketers can more effectively engage, convert, and retain their customers and improve their cross-channel performance by demonstrating to their customers that they understand them as individuals and speak to them directly.



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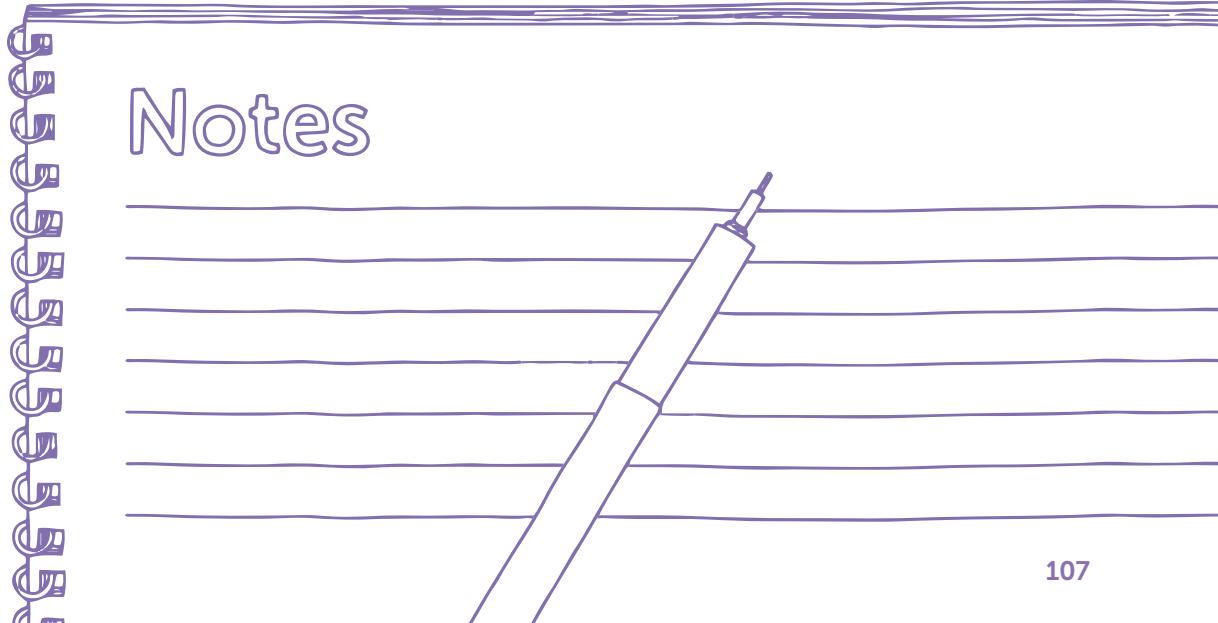
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Notes

70 % of buyers have indicated that a vendor's website was the most influential channel in making a purchase decision.

— DemandGen Report

#MKTOGUIDE



82 % of visitors find content made for their specific industries more valuable, and 67% also value content created for their specific positions.

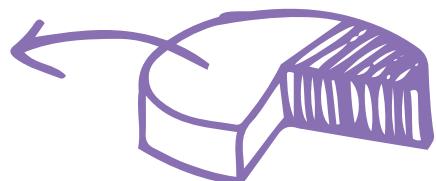
— Marketing Sherpa

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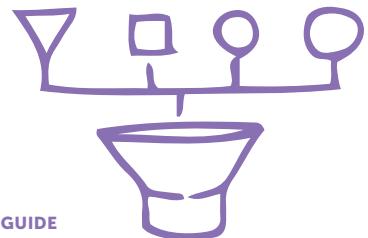
The average bounce rate for a website is

55%



— Rocket Fuel

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The most important element of a shopping journey is an easy and relevant online experience.

— Magnetic and Retail TouchPoints

More than 85% of internet users specifically expect and accept personalization as a part of their online retail experience. And, 83% of B2B buyers say company websites are the most popular channel for their online research.

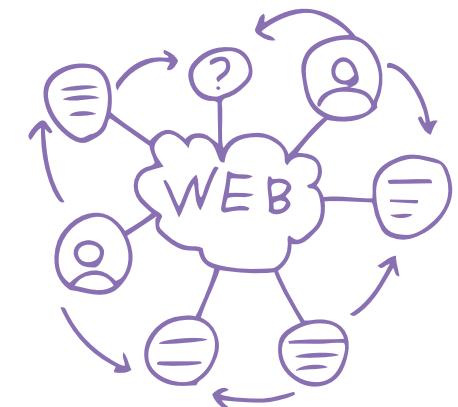
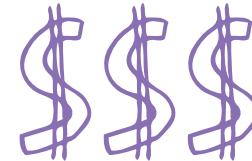
— eMarketer

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40 % of consumers buy more from retailers who personalize their shopping experience across channels

— MyBuys

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Over 80% of consumers do their own research online before buying.

— Retailingtoday

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Only a small fraction of brands are executing cross-channel communications informed by a single view of the customer.

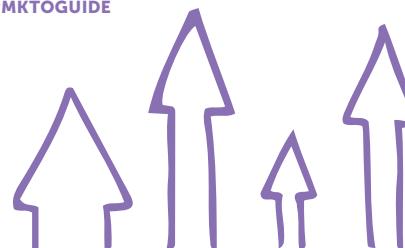
— Experian

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Coordinating messages across channels increases the performance of those channels and improves the customer's experience.

— MyBuys' Personalization Consumer Survey

#MKTOGUIDE



Nearly three-fourths (74%) of online consumers get frustrated with websites when content (e.g. offers, ads, promotions) appears that has nothing to do with their interests.

— Janrain & Harris Interactive



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Marketo (NASDAQ: MKTO) provides the leading engagement marketing software and solutions designed to help marketers develop long-term relationships with their customers—from acquisition to advocacy. Marketo is built for marketers, by marketers and is setting the innovation agenda for marketing technology. Marketo puts Marketing First. Headquartered in San Mateo, CA, with offices around the world, Marketo serves as a strategic partner to large enterprise and fast-growing small companies across a wide variety of industries.

To learn more about Marketo's Engagement Marketing Platform, LaunchPoint®, partner ecosystem, and the vast community that is the Marketo Marketing Nation®, visit www.marketo.com.