

3-MINUTE

CHEAT  
SHEET

TO...

**BETTER  
PERSONALIZATION**

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# PEOPLE REALLY WANT PERSONALIZED EXPERIENCES

**One-to-one  
customer  
interaction is the  
proverbial gold  
standard of the  
marketing world.**

The idea has been drilled into marketers for ages. As digitally driven e-commerce began to replace traditional transactions, all the talk of personalized engagement was mostly aspirational. The tools just didn't exist to create actual one-to-one engagement at scale. But the big data revolution has led to the personalization revolution. Marketers now have the technology, data and skills to truly understand their customers, and that lets them create personalized campaigns around their deepest needs and wants.

Brands are investing in those personalized campaigns in a big way. According to Gartner, over half of marketing leaders (56 percent) increased their personalization spend in 2018. The biggest drivers of all this spending are technology, media, people and content production.

For many, personalization has become their main focus area as competition intensifies and the digital space gets more complex.

Consumers have gotten used to it too and will respond to personalized content that takes their preferences and interests into account. In fact, just over half (51 percent) of consumers in the United States said they were likely to make a purchase when they received content personalized to them, according to Gartner.

Despite all of this investment, many marketers embark on their personalization journeys without a clear strategy or an idea of how personalization will fit into the other marketing programs they have running. Taking the time now to define your goals and organize your data will pay off in a big way down the road.

To help you get your personalization data strategy into shape, we've compiled a step-by-step guide to creating and executing a strategy that achieves your most urgent business needs and causes the minimum number of data-induced headaches.

# BUILD YOUR DATA PLAN

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No matter how good your personalization strategy is, it won't work if you don't have the right foundation. Data, of course, is key. Faulty, unorganized or incomplete data will get you faulty, unorganized and incomplete personalization. On top of this, there are organizational and skillset questions that need to be examined before you start rolling anything out to customers. Your data foundation will be unique to your business. Marketers should involve stakeholders from across the company to ensure that the strategy they ultimately build actually solves for key business challenges and fits into the larger organization's tech ecosystem.

## IDENTIFY YOUR GOAL

Start by defining your objective. What are your most urgent business needs? Which of those needs can data and personalization address? As you build and implement your strategy, make sure that you keep one eye on what you're actually trying to achieve. It can be easy to get distracted by all of the data coming at you, and it's important to make sure that you don't get caught up trying to solve for everything at once.

## TAKE STOCK OF YOUR DATA

You won't know what you need if you don't know what you already have. Identify all your available first-, second- and third-party data and then assess which of those data sources is the highest quality. Of course, all the high-quality data in the world won't get you far if it exists across your organization's different, disconnected silos. Make sure you have the infrastructure to seamlessly import all of your data into a central hub that all stakeholders can access.

## DON'T FORGET ABOUT PRIVACY

Failing to ensure that you're following all data regulations from the get-go will cause big problems down the road. You need to address all of the laws that exist in your geographical area, as well as any regulations in effect where your customers live. It's not a bad idea to go beyond what regulations currently require. You want to collect and organize your data in a way that engenders consumer trust. It's important that they understand why you're collecting the data that you are. Don't go crazy either. Make sure you're only collecting the data that you need to meet your objectives.



# KNOW WHAT YOUR DATA IS TELLING YOU

It's not the data itself that's important. It's the story that the data tells you about the needs and wants of your various customers. And once you know these things, you'll be able to organize your customers into various segments. Such distilled customer insights will form the foundation of your personalized campaigns, but more on this later. Down the road, you'll be able to build on these profiles and start examining the individual customers that reside in each. From there, you'll be in a good place to differentiate your approach on an individual level and dynamically personalize campaigns at different stages in their journeys.

## GET THE BASICS DOWN

Understanding your customers starts with knowing the fundamental elements of who they are. Where do your main customer groups live? How often do they visit your site or store? What calls to action have worked in the past? Many organizations are already incorporating demographic elements into their strategies, so if you are, give yourself a pat on the back and use the time to make sure all your information is still accurate.

## BUILD OUT PERSONAS

Go beyond basic demographics and examine behavioral, psychographic, interaction and campaign-level data. Look for patterns and then group similar customer types together. How you group people will depend on what characteristics you deem most important to your business. For example, an SUV maker might have customers who are "gardening enthusiasts" or "outdoor sports buffs" or "pet parents." If you're not sure which data is most relevant for your particular use case, go back to the goal you defined in the beginning. Doing this will allow you to scale your efforts and make the most of your budget.

## DON'T OVERPERSONALIZE

Modern consumers respond well to personalized content, but there is a fine line between beneficial and unsettling. Even if you have the data to do it, getting too personal can creep consumers out and make them want to stop interacting with all of your online properties. If you're having a hard time figuring out where the line is, consider what you personally would find odd coming from a brand. It's likely your customer feels the same way.





# PUT YOUR DATA TO THE TEST

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Now that you've gotten your data in place and customer profiles built out, you can start creating your personalization strategy. Once again, you need to go back to your initial goal and make sure that every element of the strategy you want to roll out corresponds to it. Whatever you do, it needs to be repeatable and can be done at the scale your goal requires. On top of that, make sure you have the content assets in place that will allow you to create the customer experiences that work for your different persona types.

## BRAINSTORM

Scrutinize the customer personas you've created and start coming up with messaging, subject lines, offers, ads etc., that you think will be most effective for each group. Channel, device type, communication frequency and purchase intent come into play here too. For example, if one group of consumers likes to browse products on their mobile phones but will typically only make purchases on desktops, target them with an offer for a discount on their phone and then follow up with an email reminding them about the offer a day later. You need to anticipate what actions people are going to take in real time to ensure you're having the most impact possible.

## TEST

Personalization isn't a one-and-done effort. Do A/B testing with every asset to determine which creative execution works best. You can play with elements such as time of day, size and frequency. If the initial tests you running don't achieve the results you want, try tweaking your strategy. No matter what, make sure you're staying organized and tracking all of your test results in a way that's easy to read and call up.

## MEASURE

Did your efforts to personalize the customer experience achieve what you wanted? Take a deep dive into your metrics and assess where conversions occurred, how many conversions occurred per campaign and individual journeys and lifetime values. Having a grasp on detailed elements like these will allow you to assess if all components of your strategy performed to expectations. Once you have an idea of how a particular strategy worked or didn't work, you can budget sufficient time, people and money for your next efforts. Take this time to assess whether or not the technology and systems you used truly created individualized engagement and delivered the results you wanted.



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Resulticks is a real-time conversation cloud enabled by the world's first marketing data blockchain. With its big data-driven, AI-powered, omnichannel approach, Resulticks is changing the marketing automation landscape worldwide.

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