

crownpeak



eBook: How to Effectively Use Data to
PERSONALIZE YOUR DIGITAL EXPERIENCES

IS THIS BOOK RIGHT FOR ME?

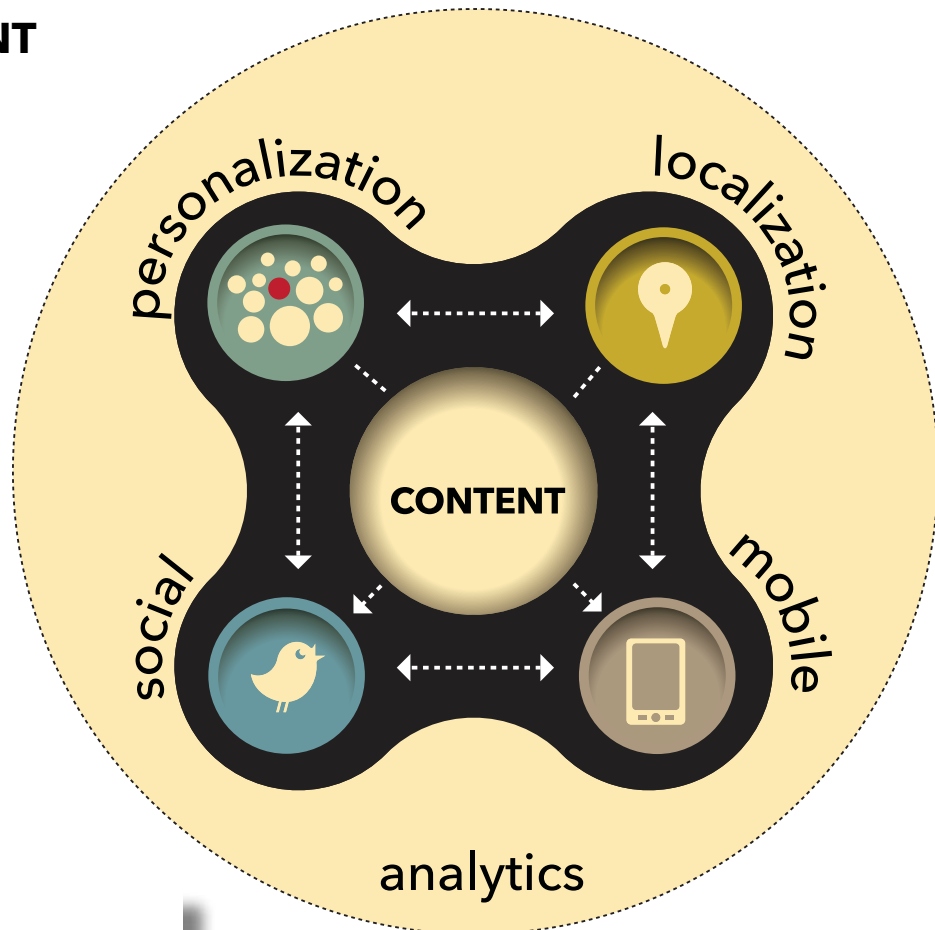
This e-book is for digital marketers who understand the general purpose of website personalization, but who want to learn more about the techniques involved with implementing a personalization strategy.

If you are looking for a framework to help you evaluate your options before you make a big investment in making personalization a core capability in your organization, then you've come to the right place. This e-book focuses on an overall approach to personalization, the different types of data available to personalize the website experience, and best practices and use cases for any enterprise wishing to deliver a highly-individualized user experience.

CROWNPEAK WEB CONTENT MANAGEMENT SYSTEM

Today's best managed global websites use web content management systems to create and manage the content of their websites. CrownPeak helps companies improve the performance of their websites by integrating key capabilities required for those companies to stand out, engage with customers and achieve their business goals. As a leading provider of SaaS-based web content management systems, CrownPeak helps global companies efficiently and effectively deliver the right content, to the right audience, at the right time using the right channels.

DIGITAL CONTENT MARKETING



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WHY PERSONALIZE THE WEB?



When it comes to communicating with customers and prospects, one message does not fit all. Even though you know this, it doesn't mean that you're able to do it all the time. Personalizing in all regions, languages, devices can be tricky to pull off without the right platforms and processes in place. But the benefits are worth it.

Companies that offer a personalized website experience typically have higher conversion rates than websites that generalize their content¹. They also experience lower abandonment rates because the products, services and offers being displayed are relevant and in the context of a visitor's interests. Personalization clearly improves the overall user experience, which naturally results in improved brand perception. The challenge is how to "do" personalization really, really well!

The pinnacle of achievement in personalized marketing goes way beyond the website. It's about delivering a consistently individualized message across any and all channels the organization uses to communicate with its customers.

BENEFITS OF PERSONALIZATION

Enhanced brand perception

Improved user experience

Decreased abandonment rates

Increased conversion rates

In fact, for the past 30 years, companies have been trying to deliver personalized experiences across every communication channel: direct mail, call centers, ATMs, websites and now smartphones, social networks and whatever comes next.

If you want to see this in action, next time you're at the ATM pay attention to the display ads and offers. See how they personalize the experience based on what they already know about you to suggest additional products, services and such.

¹ MarketingSherpa, Landing Page Best Practices Benchmark Study 2012.

WHY PERSONALIZE THE WEB?

Your customers and prospects expect this kind of website experience. They want to know that you understand them. They don't want to waste their time searching for something. They want you to anticipate what they want, and give them what they need, before they actually know they need it.

Your competitors are trying to differentiate themselves, just like you are. They are trying to make their website experience better than yours. So you need to always be one step ahead of them - making your website experience as efficient and satisfying as possible. Everyone is moving in this direction and the first to deliver the best personalized website experience will have a significant strategic advantage.

If you invest in personalization, you'll sell more - online and offline. Your website will help you build relationships that convert into paying customers. The experience will encourage repeat visits, purchases, referrals and recommendations. Whether you market to businesses or consumers - the goal is the same; use your website to build awareness and generate leads that convert into sales.

**USE YOUR WEBSITE TO
BUILD AWARENESS &
GENERATE LEADS
THAT CONVERT INTO SALES.**

WHAT IS WEBSITE PERSONALIZATION?



The idea of website personalization has been around as long as there have been websites. The challenge has been how to technically change the content on the page so it is targeted to a specific type of visitor. Advances in technology allow us to deliver targeted content easily without requiring cumbersome website updates or redeployment.

Website personalization uses technology to accommodate differences between people. By watching behavior, tracking ambient data (like geographic location for example), websites can learn individual preferences and provide content, messages and offers that are specific to your customer and their interests. Using segmentation and targeting (based on what is known about individuals and groups) it is possible to deliver tailored content to different people in different contexts. For example you could deliver an in-store coupon to someone on a mobile phone who happens to be near one of your company's retail outlets.

Using a combination of implicit and explicit data, it is now possible to dynamically deliver relevant content to individual web pages without impacting site performance (because that wouldn't be a great experience, would it?)

just a side note.



There is a great deal of confusion about the difference between personalization and customization. Customization allows a user to specify what content should be displayed and in what form (to change layout, hide certain content, etc.). For example, with Yahoo! Or Google, the user can control the page layout, colors, and content by adding specific widgets and entering their preferences. Customization is a generic feature, and while necessary in some cases, it is not sufficient for the purpose of differentiation.



WHAT IS WEBSITE PERSONALIZATION?

Personalization uses a variety of data to serve up relevant content (targeting) to either a specific person, or group of similar people (segment) based on interests, profile, behavior, etc. For example, when you sign on to Amazon.com, they know your buying and browsing history. They target recommendations that are specific to you, and are able to promote specific products knowing there is a higher likelihood that you'll buy because you've bought similar things in the past.

DIFFERENCE BETWEEN PERSONALIZATION AND CUSTOMIZATION



Amazon.com uses **personalization** techniques to provide content specifically for a unique user based on previous history.



Yahoo! uses **customization** that enable a user to change the design and content that appears on the page.

CONSIDER YOUR AUDIENCE



It all starts with your visitors. It helps to think of them as two distinct groups: *Known* visitors and *Anonymous* visitors.



Known visitors are people who have chosen to identify themselves to you in some way - either by completing a form, registering for your service, or downloading your latest white paper. If your site uses cookies to track visitors, then you have some history of their behavior, interests, preferences, etc. With known visitors you can target content based on known information and other implicit data like their operating system, ISP, geo-location, and

supplemental data provided by 3rd parties like DemandBase, Jigsaw, LinkedIn or similar information-related services. The result is a website experience that is tailored to a specific person, providing them with valuable content that is relevant to them.



Anonymous visitors are people who have not provided personal information -

but that's not to say you don't know a lot about them. Using ambient data you can learn what operating system they run, where they're located, who their ISP is, what search terms they used to find our website, and more. You can use this data to target content even if you don't know the person specifically - for example, if they did a search on "facilities management" and found your website, you can personalize your landing page to highlight

that search term in your headline and then offer them a white paper you have on facilities management.

Just because you don't know an individual's identity, doesn't mean you can't gather a great deal of information and segment them accordingly, thus allowing personalization and targeting, even to people you don't know.

SEGMENTATION AND TARGETING



Once you understand your visitors, the next step is to group your audience into segments with similar interests, needs, etc. Targeting content to those segments is a matter of defining the business rules that govern what content, messages and offers are delivered to each segment.

Segmentation: Each segment is defined by specific criteria. Segments are usually created using a combination of demographic, behavioral and attitudinal characteristics. Segments can be large or small depending on the criteria. As long as the segment has similar interests and needs then targeted content will be interesting and relevant to all customers in a given segment. Examples of segments could include:



IT Managers of Global
1000 Manufacturing firms.



College aged males
with iPhone 5.



DINKs - Double-Income-No-Kids

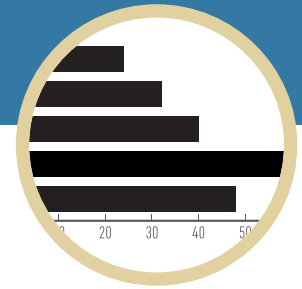
SEGMENTATION AND TARGETING

Targeting: Targeting rules are used to dynamically deliver content and drive a specific outcome or behavior. Content is delivered based on the platform or channel of the visitor. Consider a segment of "IT Professionals in fortune 1000 companies". The targeting rules might say that any of these visitors to a website need to see a promotion for "IT Services". The content would be delivered via whichever channel the visitor was using at the time - a website, their mobile phone or a tablet.

Examples of targeting rules could include:

- If a visitor hits the websites more than 3 times and doesn't download anything, open a Live Chat window and ask them if they have any questions.
- When a customer calls a call center, the script delivered to the customer service representative is determined by the last interaction that customer had with the company.
- If a visitor's IP address is from outside the US, then open a dialogue box asking their language preference and send them to their requested page translated in that language.
- When a customer checks out of a retail store, coupons are dynamically generated based on that customer's shopping habits, and printed on the back of store receipts.
- If a visitor comes to the website via search, provide promotional offers featuring related content on the same topic.

TYPES OF DATA AVAILABLE



Personalization depends on DATA...lots and lots of data. And we know you have lots of data. The tricky thing is breaking it down into useful chunks that can be used in personalization. When thinking about Known and Anonymous visitors, there are primarily four types of data to consider:

KNOWN visitors		ANONYMOUS visitors	
3RD PARTY DATA	USER-PROVIDED DATA	AMBIENT DATA	BEHAVIORAL DATA
Data integrations Company Title Address Phone	Registration data Form fill Customer data	Device, OS, Browser Navigation Keywords Time of day Location	Click patterns Page views Time on page

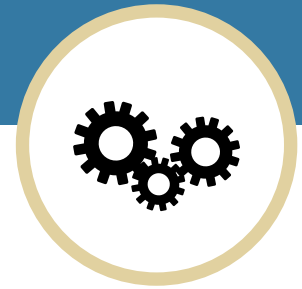
3rd Party Data is a great resource to supplement data you already have. It can make your data more robust, more complete and much more effective because you can create a comprehensive profile of a visitor without asking them for a ton of information.

User provided data is data collected from visitors via some type of form (registration, profile, etc.) The key to getting users to provide more data is to auto-populate information whenever possible and minimize the number of details you ask them to provide each time. Users complete short forms at a much higher rate than long complicated forms.

Ambient Data is available behind the scenes from a variety of sources such as web server logs and analytics tracking software. When considered as part of an overall personalization strategy this data allows you to target delivery models, feature content, local languages and more.

Behavioral data is information that is trackable. We can track behavior of anonymous visitors using cookies. Privacy laws vary by country and can be very restrictive as to the use of cookies and other tracking devices. It is critical to adhere to local security and regulatory requirements.

USE CASES: HOW TO MAKE THE DATA WORK FOR YOU



Personalization techniques will vary based on industry, location, type of customer, etc. Here are some examples of how data can be applied in different scenarios to deliver a personalized web experience with a very specific goal in mind.

Product Promotion: Company X is a financial services company trying to increase sales of their 401K product. The head of digital marketing wants to focus on keywords to personalize the website experience to help convert sales of 401Ks. Using their content management platform, they have targeted keywords and phrases containing "401K". Any visitor using this search term is going to have a 401K message appear on the page they land on - regardless of the specific page. This message points to articles and videos explaining what a 401K is and how it works. If a visitor views a video, a special promotional offer is dynamically generated and presented after the video is finished. The visitor clicks on the offer, completes a form to request more information and a solid lead is generated.

Data used: keyword tracking, click patterns

Mobile Marketing: Company Y has a chain of retail stores. They want to drive traffic to stores during the holiday season. The CMO has approved a mobile coupon campaign and the digital marketing team has been tasked with implementing it in time for the holiday rush. Every visitor to the website will be evaluated based on their operating system. Anyone with a mobile device will be prompted to allow location tracking. When the visitor does allow location tracking, the company sends them a coupon with a map to the nearest store location. If the visitor doesn't allow location, they are presented a link in the mobile interface for the coupon.

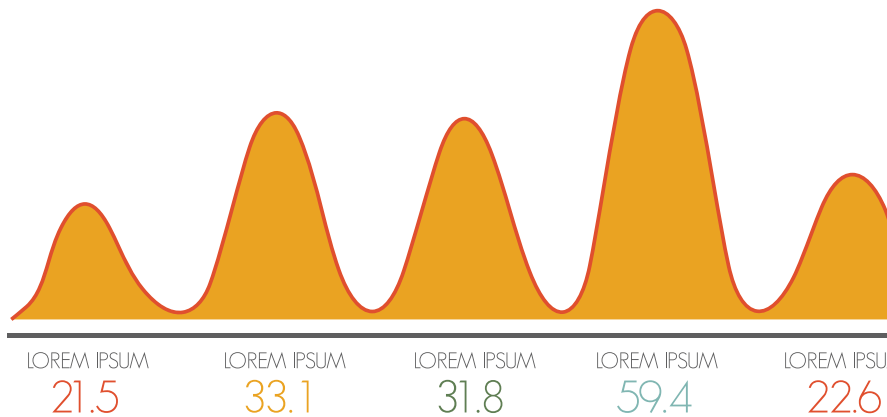
Data used: OS detection, geo-targeting

USE CASES: HOW TO MAKE THE DATA WORK FOR YOU

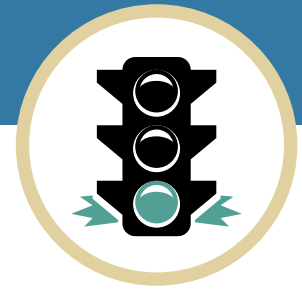
Regional Targeting: Company Z is a global provider of telecommunication services and equipment. The VP of Sales has asked the digital marketing team to help focus website visitors to the right sales reps to improve conversions. The team set up targeting rules based on profile data for existing customers (company name, title, location from the customer registration database) and 3rd party data for anonymous visitors (using reverse-IP look up services to find company name, and data mining sources for name, title and location). Using this information, each visitor will see a "Contact Your Sales Rep" information box on each page. The featured sales rep will either be the Global Account Rep for that company OR the local sales rep in their area.

Data used: profile data, reverse-IP look up

Using a combination of data from a variety of sources, you can personalize a website experience with almost any combination of content. You are limited only by your imagination.



TESTING SCENARIOS: WHERE TO START



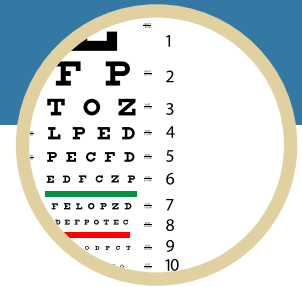
The great thing about a personalization strategy is that you can try and test any idea you can possibly think of. Here are a few ideas to get you started.

Search Terms: Even sites that are really great at search engine optimization have a hard time presenting content that reflects individuals search terms, or keywords. This is especially true if a large portion of your search traffic is directed to your home page. Using personalization techniques you can dynamically target content on a landing page, or home page, based on the segments search terms. For example, if a visitor searched on “coffee makers” one of your business rules could trigger the placement of a coffee maker product, promotion or discount on the landing page.

Geo-Location: If you have products, services or personnel that are specific to a certain geographic area, then you can offer up the right choices to visitors based on their location using their IP address or other geo-location information. Let’s say a visitor comes to your site from Indianapolis and is looking at your “Contact Us” page; you can dynamically change the contact information to display the local sales rep responsible for Indianapolis.

Technical Info: Some businesses are more technical than others. Sometimes knowing the technical details of your visitors will open up new business opportunities. Information like operating system, platform, ISP, connection speed and such are a windfall of opportunity if applied properly. If you sell software, knowing the visitors OS allows you to promote the right product, a Mac vs. a PC, for example.

BEST PRACTICES: WHERE TO FOCUS YOUR ATTENTION



Best Practice #1: Focus on the business driver

The business driver behind most websites is to encourage a visitor to take a desired action. In most cases this action typically amounts to Sales, Conversion or Profile Enhancement.

In the case of Known visitors, to drive up sales, you might offer cross-selling opportunities by exposing the visitor to new and complementary products. You might direct them towards a regional sales rep for further discussion. In the case on Anonymous visitors you might tailor the content on a page based on search terms, their operating system, or a referring site. In both cases, you could offer up a mobile-optimized experience for anyone detected on a mobile device.

The key is to always know what you're trying to accomplish with your website, micro-site, landing page or promotion.

Best Practice #2: Know when to reveal content

When to reveal content to website visitors depends on where they are in the buying cycle. It can be difficult to know exactly where someone is in the process when they first visit your site. But as you start to track their behavior, see what content they are viewing, and what they register for or download, you start to understand where they are in the process.

Using targeting rules you can create specific paths for visitors at different stages of the buying cycle. If someone downloads an introductory piece of literature, you can assume they are early in the process and doing their research. If however, they ask for a demo then you know they are evaluating their options before making a decision.

BEST PRACTICES: WHERE TO FOCUS YOUR ATTENTION

You can even automate the unveiling of related content using meta data tied to individual assets like white papers, videos, and such. For example, clicking on an article on “Website Personalization” might trigger an ad to be displayed on the page featuring a webinar on the same topic.

Best Practice #3: Demonstrate you know the details without asking

Use the data available to you to anticipate what a visitor might want. Only ask visitors to provide information via forms when you really need to, or when it’s part of a lead generation strategy. Ambient data can tell us a lot, and so can a technique called Progressive Profiling. This technique allows us to create shorter forms, which have a much higher conversion rate, which we all love! Existing customer data should be used to pre-populate forms whenever possible. This lets your customers know you know who they are and that you’re paying attention to them, which they love!

Best Practice #4: Review results vs. key performance indicators (KPIs)

The time you spend to personalize and target content must deliver a positive return. You should always consider testing as part of targeting. By knowing what works and what doesn’t you can optimize your targeting efforts to those that deliver the highest return - whether it’s sales, conversions or profile enhancement. Targeting doesn’t always require technology. But using great technology can make personalization much more efficient and effective.

*just a
side note.*



PROGRESSIVE PROFILING works by asking visitor for information incrementally rather than all at once. Over time leads provide more and more data based on their interaction with a website, social media or other digital properties. When a visitor comes to your site for the first time, they only need to provide basic information like first name, last name and email address. That’s all you need to start building a profile. Plus, the shorter the form, the higher the conversion rate. With each subsequent visit and interaction (a request to download content or register for an event) you will collect new, valuable data.

POTENTIAL PITFALLS: LEARN FROM THE MISTAKES OF OTHERS



Personalization is not the end-all-be-all of digital marketing. It is a tool to improve visitor engagement, increase conversions and drive desired behavior. But it is not without its challenges. Consider these issues when developing your personalization strategy.

Privacy concerns: Most people are concerned with privacy. They want a personalized experience, but they also want to know that their personal data is safe and secure. Acknowledge their fears with a visible privacy policy. Once people know what your policy is they are much more likely to be able to share information with you. It's also important to note that privacy laws vary country to country. In some jurisdictions, companies are required to notify visitors of the use of cookies. The London Olympics is considered a particularly well-presented form of cookie usage disclosure.

Inaccurate Assumptions: Personalization, while data driven, also requires you to make certain assumptions. Based on data you can assume you know a lot about each of our segments. In most cases, you're going to be right, but in some cases you are going to be wrong. In these situations technology can't replace customer relationships or two-way communications.

Platforms Considerations: Personalization techniques depend on a robust platform to manage the content, trigger the targeting rules, render the dynamic content and display that content in the manner required by the visitor (mobile, web, etc.) There are many solution providers

able to help with many aspects of personalization. Do the research and find one that best matches your business requirements.

STAND ALONE PERSONALIZATION PLATFORMS

E-Commerce:

Certona
Monetate
Baynote

Testing & Targeting:

Optimost (now part of Autonomy/HP)
Test and Target (Now part of Adobe)

THINGS TO REMEMBER



Personalizing the website experience is one of the most effective ways to improve the performance of your website. It allows you to target content, test variations, and quickly apply what you learn to make the experience even better.

To summarize, here are the key takeaways:

- Personalization improves a visitor's website experience, and improves the overall performance of the website because those visitors are more likely to do what you want them to do.
- Evaluate personalization opportunities based on the available data (Behavioral, User-Provided, Ambient and 3rd Party.) Then consider how each personalization technique aligns with your marketing strategy and business objectives.
- A robust platform is required to create, manage and deliver personalized content. CrownPeak is the platform preferred by global companies with multiple websites in multiple languages who understand the value of having personalization capabilities embedded into their Web Content Management platform.

DEFINITIONS

Personalization: dynamically changing the content of a website to appeal to a certain type of visitor

Customization: allowing the user to change the look and feel of a website and the content that appears

Segment: a group of individuals with similar characteristics (behavioral, demographic, attitudinal)

Targeting rules: enable the display of specific content to a chosen segment

Behavioral data: data that describes website visitors' actions within the site (clicks, page views, time on site, etc.)

User-provided data: personal information captured via forms (registration, profile, etc.)

Ambient data: is available behind the scenes via analytic tracking programs (operating system, ISP, location, etc.)

3rd party data: data that can be purchased to supplement existing profile data (company, title, phone number, email address, etc.)

Progressive profiling: collecting visitor data incrementally over time

just a side note.



share this book!

THE CROWNPEAK ADVANTAGE

Founded in January 2001, CrownPeak was the first company to offer a cloud web content management solution. Today, the company provides web content management and website optimization software as a service to hundreds of customers and thousands of business-critical websites. Built for marketers by marketers, CrownPeak's products and services enable organizations to optimize their websites to measure and maximize business results.

CrownPeak WCM empowers digital marketers to execute and innovate their time-critical web projects quickly by providing them with a full suite of tools to manage, develop and evolve website content.

Its SaaS-based delivery model significantly reduces, or even eliminates, many of the financial and operational barriers inherent in traditional on-premise solutions, while offering transparent scalability and availability to complex global enterprises.

Enterprises adopting CrownPeak WCM have delivered market-leading results in real-time responsive online campaigns, revenue growth, lead generation and global branding. CrownPeak WCM powers rapid, agile innovation across almost 4,000 web sites for global marketers such as EMI, MetLife, Skype, Lilly, Prudential and Intercontinental Hotels.

**FOR A FREE LIVE DEMO,
CALL US AT:
1.800.887.1944**



About Crownpeak

Founded in January 2001, Crownpeak was the first company to offer web content management through a SaaS solution. Today, leading brands trust Crownpeak's cloud-first Digital Experience Management (DXM) platform to quickly and easily create, deploy and optimize customer experiences across digital touchpoints at scale. Crownpeak provides a complete solution for DXM featuring content management, personalization, search and hosting, in addition to fully integrated Digital Quality Management (DQM) to ensure brand integrity and meet compliance requirements. More than 180 customers including Unilever, BNY Mellon, Thomson Reuters, Eli Lilly, and Aflac rely on Crownpeak to deliver engaging experiences that delight customers, promote loyalty and deliver results.

Customers include AFLAC, AIG, Diageo, Eli Lilly, Kaiser Permanente, Men's Wearhouse, MetLife, Prudential and Sony Music. For more information, visit www.Crownpeak.com.