# Web Personalization 101: CREATE PERSONALIZED

CREATE PERSONALIZED
MARKETING EXPERIENCES
FOR YOUR BUYERS



## WHAT IS PERSONALIZATION?

Today's buyers have higher expectations than ever before. As marketers know well, consumers are better informed, more selective, and quicker to say no – or to simply walk away. They are bombarded with so many marketing messages each day that only the smartest, most targeted, most relevant messages make the cut. If you can't immediately address their needs, visitors will glaze over your messaging (or bounce from your website) in a flash.

And that means it's no longer enough to have one message – to appear relevant to every individual in your audience, you need multiple messages, personalized for each one.

But how can you craft individually personalized messages at scale? How can your marketing attract both potential and current customers with every relevant use case for your products, at every stage of the funnel, and entice them to make a purchase?

Using real-time personalization tools, you can create personalized, customized, targeted marketing experiences for every member of your different audiences. You can show your potential and current customers the content they want to see, in the way they want to see it. And you don't even need to come up with new content – whether it's an ebook, a display ad, a video, or a blog post, you can personalize the content you already have, showing relevant pieces to targeted individuals.

In this ebook, we'll show you how personalization allows you to craft customized experiences for every type of buyer, and helps you get, well, personal.



### The Core of Personalization

The term "personalization," which we'll use throughout this ebook, refers to dynamically creating personalized, highly relevant content for your buyers. Personalized content is content that meets your buyer's interests, fits their profile, provides your best pitch to their segment, or is otherwise specifically relevant to them.

If you're not sure what that looks like, think about it for a second - you may have encountered personalization before. Have you ever clicked through recommendations on Netflix or Amazon.com, based on your previous selections and reviews? These are both common examples of personalization.

Whenever brands leverage data (behavioral or demographic/firmographic - more on that later) to create relevant buying experiences, that's a type of personalization.

Some marketers assume that personalization is complicated or time-consuming, but realtime personalization tools actually use a very simple, two-step process. When, for example, a consumer visits your website, real-time personalization tools automatically do the following:

- 1. Identify the visitor's attributes (like buying intent, behavior, persona, geo-location, firmographics, etc.)
- 2. Based on those attributes, presents her with the most relevant copy, imagery, offers, or calls-to-action, creating an experience uniquely customized for each visitor

Let's say a potential client visits your website from the Bank of Gotham - one of your company's hottest prospects. Based on your preferences, your real-time personalization tool will recognize Bank of Gotham's IP address, and automatically display the content you've indicated is most relevant to the company - like a case study of another financial organization.



With personalization tools, you can get as specific or as broad as you want – for example, you might want all visitors from banks to have a certain website experience, or you might want to show specific messaging to visitors from Bank of Gotham in particular. This is especially useful if your audience comes from more than one industry – your financial industry clients might want a very different message than those in healthcare.

But this isn't for B2B marketers only – real-time personalization tools can also identify attributes relevant to individual consumers, such as geolocation, product interest, search terms used, device used, and more. Additional third-party data can provide other information about shoppers, such as their buying habits, which you might then base your personalization on.

For example, a retailer might want website visitors from a certain city to see an invitation

to a local store featuring specific products – real-time personalization tools can determine a visitor's location, right down to the zip code and their behavior. You might want to say "Good morning" to a visitor in California, but "Good evening" (or a Dutch "goedenavond") to visitors in Amsterdam. These tools can also identify the search terms which brought visitors to your sight – if the visitor just Googled "leather purse," why not put your leather purses front and center?

## WHAT ADVANCED REAL-TIME PERSONALIZATION TOOLS CAN IDENTIFY

Advanced solutions like Marketo's Real-Time Personalization can identify attributes that will turn your run-of-the-mill marketing campaigns – for both consumer marketers and B2B marketers – into highly targeted, relevant conversations.

Here's a partial list of attributes sophisticated personalization tools can identify:

### **Profile Attributes**

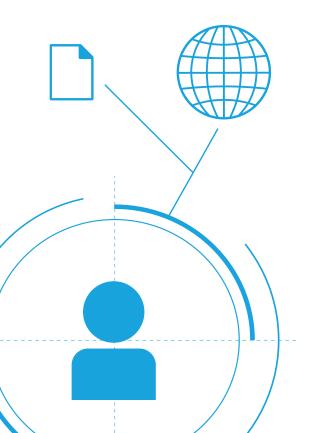
- Place of work
- Size of company
- Revenue
- Industry
- Geo-location

### **Behavioral Attributes**

- Product interest
- Buying history
- Site browsing history
- Number of visits
- Search terms used
- Price sensitivity

## PERSONALIZATION KEYS: THE WHO, WHAT, AND WHERE

To leverage real-time personalization tools, you'll first need to determine three things: who your target audience is, what you'd like to say to them, and where that audience will interact with your content.



### Who Are You Personalizing For?

Who is your target audience? Regardless of who you're marketing to, you'll want to define your audience based on the attributes like geo-location, product interest, price sensitivity, search terms, web visit history, buying history, and more. If you're marketing to other businesses, you'll also want to take firmographics into account (such as company name, industry, size, and revenue).

As you map out your target audience, don't panic if you can't identify every segment of your audience that visits your site. Instead, focus on a few important segments — a B2B marketer might want to target software companies or healthcare companies; a consumer marketer might be looking for new parents in Southern California, or teenagers shopping for prom dresses.

The buyer's journey can also be a big part of defining your audience. The typical four stages of this journey — Awareness, Interest, Evaluation, and Commitment — tell you how close a consumer is to buying your product. If you do define your segment by their stage in the customer journey, you don't need to go overboard with fine-tuning. As an example, one of your segments might be "anyone in your audience who is in the Evaluation stage." Or "A prospect from the financial industry at the early/awareness stage."



### What is the Right Message?

Now that you know who you are targeting, it's time to decide what messaging you'd like to present. Whether you're a B2B marketer working with content like case studies and ebooks, or a consumer marketer working with videos, special offers, and ads, you probably already have content that appeals to many of your audience segments. Personalization is all about making sure that content gets seen by the right people.

How? Personalization software can allow you to adjust your call-to-actions based on the person visiting your website. For example, the CEO of a software company might see one call-to-action at the bottom of a blog post, while the CEO of a healthcare company (reading the same blog post) sees another. Using tools like Marketo's Content Recommendation Engine (which we'll discuss more later), your personalization software can monitor which segments respond best to each piece of content, and adjust accordingly.

You can also create personalized experiences through the placement or prominence of your content – maybe one segment of your audience sees your new TV ad front and center, while another sees only your slogan. You can personalize your website's interface and navigation, depending on the visitor.

Additionally, you can mix and match existing content attributes (like offers, images, or even copy) to create multiple "experiences" of a single content piece. You can swap out the header, logos, or even the images you present – in the example we just discussed, you might show the software CEO an image of a computer, and the healthcare CEO an image of a doctor.

To see how this looks is action, here are two versions of Marketo's home page. The first version on the left is shown to visitors not identified as Marketo customers. The second version on the right is shown to visitors who are current customers.

As you can see, the bottom row of buttons dynamically changes – prospects see a "Free Trial" option in the navigation bar, while customers have the opportunity to "Log In" directly to the product or register for upcoming customer events.





## Where Will You Serve Personalized Content?

After you've decided who you're trying to reach, and the content you'll use to engage them, you need to decide where you will serve your content up. You can personalize your website, emails, display advertising, and mobile marketing.

Personalization is thus a driving force for both inbound and outbound communications.

Once of the most powerful use cases for personalized content is on your website. You've invested a lot of time and money attracting buyers to your website, through pay-per-click ads, public relations, trade show sponsorships, paid promotion on social media networks, and more, which is why you want to make the most of every visit.

Also, because website visitors are actively coming to you, you know they're paying attention – if only for a moment. According to Microsoft Research, the first 10 seconds of a page visit are critical to a user's decision to stay or leave. So during those crucial 10 seconds, you need to give them the information they want, and quickly.

That's where personalization comes in: if you can serve up messaging specifically tailored to appeal to those visitors, they're much more likely to stick around.

#### **Personalization in Action**

Now that we've covered your audience, the content you'll serve, and where you'll personalize it, let's put it all together. To give an example, we created a homepage for a fictional electronics store, "Gorilla Electronics." Let's say a visitor spends significant time reviewing Gorilla's inexpensive laptops, but does not immediately put one in her cart. Based on this behavior, Gorilla could use real-time personalization to highlight other laptop offers in that price range, during this and subsequent website visits, as shown below:



Next, here's a real life example of how LiveU, a leader in portable live video solutions, targets two different industries: broadcast media and sports. They use Marketo's Real-Time Personalization to target both industries directly on their homepage, with a mixture of dynamic content, images, and calls-to-action relevant to each type of visitor.

Below left is what LiveU's homepage looks like when seen by a vistior from the broadcast media industry.

This version of the homepage includes a product video, images, calls-to-action, and links to trade shows relevant to broadcast media. The largest image shows broadcast journalists interviewing people on the street.

When a visitor from the sport broadcasting industry, however, sees the homepage, it looks like the screenshot below right.

Now, the largest image is of a sporting event. The trade shows appearing on the homepage are relevant to sports broadcasters, and the product video demonstrates how the product works during sports games.

In short, the entire web experience dynamically changes in response to a visitor's industry – and all of this happens automatically.

### LiveU's homepage when viewed by prospects from the broadcast media industry



### LiveU's homepage when viewed by prospects from the sport broadcasting industry



## REAL-TIME PERSONALIZATION AND MARKETING AUTOMATION

Integrating your personalization software with your marketing automation solution can bring additional bottom-line benefits. There is a strategic symmetry between the two: both are powerful customer-engagement tools, and combining them multiplies that power.

As a marketer, your goal is to build as complete a profile as possible of all of your potential and current buyers. The more accurate this profile, the better your ability to target each visitor with the most relevant message. Real-time personalization software and marketing automation can do this together, pushing and pulling information from each system, continually updating buyer profiles.

While both solutions are independently powerful, there are three main advantages to integrating your personalization software with your marketing automation solution:

Individual-based marketing, optimized landing pages, and more qualified leads.

## MARKETO'S REAL-TIME PERSONALIZATION

Marketo's Real-Time Personalization has an auto-tune feature that automatically identifies which CTA or content is earning the highest click-thru rates. It then runs only the highest-performing CTA or content, per target segment, on your landing pages. Targeting different audiences with customized messages means higher conversions and a lower cost-per-lead.

Let's look at each of these integration advantages more closely:

#### 1. 1:1 Individual-Based Personalization

At the end of the day, you're marketing to people. Whether you're talking to a CFO researching software or a teenager in the market for her first car, you'll get a more positive response if you bring all the information you have to the table.

Individual-Based Marketing allows you to have actual 1:1 conversations with your current and potential customers, using their likes and dislikes to frame your discussion. Personalization software allows you to unify conversations across all channels and generate personalized digital experiences for every individual customer. When you combine that with the rich behavioral profile and targeting capabilities of marketing automation, a new level of personalization is unlocked, based on individual behaviors rather than broad, predetermined segments.

For many companies, particularly if you're marketing directly to consumers, Individual Based-Marketing can be the most effective, relevant way to personalize for your buyers. With Individual Based Marketing, you can customize for who the person is, her exact

preferences, lead score, history, relationship with company, stages of sales cycle, and more. You are not only targeting that persona, which is powerful in itself, but you are targeting each persona individually. For example, one of our customers, a software middleware vendor, tailored specific messages to technical decision makers at specific stages of the sales cycle based on their lead profile data and actual behavior.

### 2. Optimized Landing Pages

Most of your paid media, social, and email campaigns direct your audience toward landing pages. You've probably paid a lot of money to drive traffic to those pages, and you want to turn those visitors into leads. Instead of creating multiple static landing pages with a variety of designs, content, and CTAs in order to cover all your bases, real-time personalization allows you to create single "smart" landing page with content, visuals, and CTAs that are dynamically adjusted depending on who lands on them. You can then run A/B testing to determine which message works best for each audience.

#### 3. More Qualified Leads

The more form fields, questions, and roadblocks you put in front of visitors, the less likely they are to become customers. But you do need data to accurately gauge their interest level and their place in the sales funnel. By tracking your visitors' behaviors and web activity, you can

determine their level of interest in your solution (engagement) in addition to your interest in them (demographics targeting). Only by combining both factors can you send truly qualified leads to sales.

Personalization drives particularly qualified leads when paired with Account Based Marketing (or ABM). Traditionally, marketers capture as many leads as possible but don't qualify those leads until they are well into the funnel. With ABM, you target a key group of specific accounts – so leads are qualified before you market to them.

Personalization tools identify visitors from those target accounts, and syncs this information with your marketing automation platform seamlessly, so the content you're feeding new visitors aligns with the content they receive throughout their buyer journey. You can also track customer behavior across all of these channels, creating ubiquitous, synchronized web marketing.

In short, real-time personalization multiplies your return on investment in marketing automation.

## PERSONALIZATION AND ANONYMOUS LEADS

Real-time personalization tools can actually identify attributes about even anonymous visitors to your site. That means you can capture their attention with relevant messaging – all before they've even entered your database. When coupled with a marketing automation tool that already keeps track of your known potential buyers, you now can target personalized content precisely to all of your visitors.

So how does real-time personalization detect anonymous visitors? When a visitor browses a site enabled with personalization software, a copy of his browsing information is sent to the database – his server's IP address (which will be used to identify the industry, size, and revenue of any visitor from a known company), along with page visits, geo-location, referrals, search terms, and other browsing details.

Next, the software looks for a pre-set marketing campaign that matches that visitor's data segment (this campaign is initially set by you, the marketer). If a match is found, the appropriate campaign is launched.

Automatically, the text, banners, CTAs, and images are dynamically changed, instantly creating a personalized experience. This entire process happens in less than 30 milliseconds — "real time" — while the visitor is actively engaged and attentive on your website.

By the time an unknown visitor finally gives you his email address, your personalization tools will have already tracked his browsing data (from the first time he visited your site) and can automatically push it to your marketing automation software. This gives you a more complete picture of that visitor and his stage in your buying cycle right off the bat. Those

insights can then trigger targeted email campaigns and updates to the visitor's scoring — all without you lifting a finger.

Let's say a known visitor comes to your datastorage website multiple times. She keeps returning to technical pages about one of your products, which suggests she is at an advanced stage in her search for a data-storage solution. Your marketing automation platform tells you that this prospect is a CTO, so you can assume that she already understands how data storage works and is now looking for more advanced content.

Based on both what she is doing now (browsing technical pages) and her visitor information (her job title as CTO), you can present personalized content on the pages she is viewing and send an email campaign tailored to attract her attention – and this can be triggered within your marketing automation's email function.

## MAKE EVERY PIECE OF CONTENT WORK OVERTIME FOR YOU

According to Forrester research, the modern buyer will consume an average of three pieces of content from a company's site for every one piece that marketing or sales can realistically deliver.

The good news? You may have many pieces of good content in your arsenal already.

Companies develop content — videos, PDFs, webinars, blog posts, reports, podcasts — over time. But if your content isn't reaching your potential buyers, it's not doing you any good.

That's why content recommendation is one of the most powerful functions of advanced personalization tools. Sophisticated personalization software can push the content your visitor is most likely to be interested in, based on their profile and interests. These tools can match your visitor's demographic/firmographic information and browsing behavior to the demonstrated content preferences of

other visitors – those with similar information and behavior. In essence, your existing content works overtime for you.

### How Does Content Recommendation Work?

So how do personalization tools recommend content? First, you need to understand two basic concepts: **big data** and **predictive analytics**.

**Big data** has been getting a lot of buzz lately, but it's not just a buzzword. It is a sort of catchall phrase for all data sets so complex that they necessitate new forms of processing – think about data like "every post to Twitter between 2004 and today," or "every consumer who visited your website at least twice and opened one of your emails this month."

**Predictive analytics** encompass a variety of information-sifting techniques — including modeling, statistics, data mining, and machine learning — to predict a visitor's future behavior and actions. Big data is only useful when it's put to good use; analytics puts information to work.

Marketo's Real-Time Personalization software automatically use big data and predictive analytics to gather relevant information (like behavior and demographics/firmographics) from your potential buyers and react to that data in real-time. A content recommendation engine also allows you to analyze content consumption of various audience segments, discovering new ways of using messages and content to improve ROI. You can then use this consumption information to optimize your marketing programs with these targeted segments at every stage of the sales cycle.

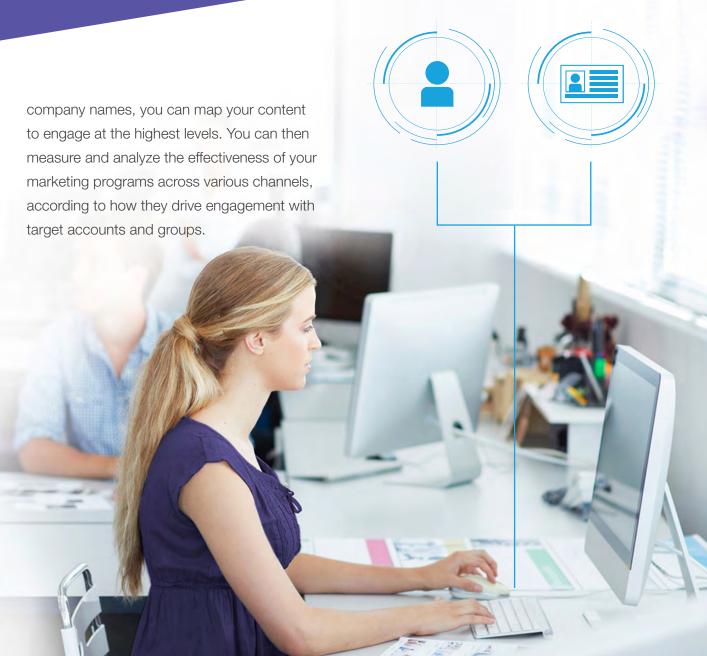
## ADVANCED TECHNIQUES WITH PERSONALIZATION

Now that we've covered basic personalization, here's how real-time personalization tools can help you with advanced marketing strategies. We'll focus here on two advanced strategies: Account-Based Marketing and Persona-Based Marketing.

### Personalization and Account-Based Marketing

Account-Based Marketing (ABM) is a B2B marketing technique, in which you focus on a group of accounts with similar attributes that are either a) most likely to generate revenue or b) strategically important to your organization. Using personalization tools to refine your ABM approach, you can guide high-value accounts through their decision-making process, no matter the channel through which they engage your company.

By identifying and targeting accounts according to vertical, company size, and lists of specific



Let's look at ABM and personalization in action. Before software vendor Panaya implemented real-time personalization, they were targeting the SAP market. As you can see from the first screenshot on the right, their default messaging consisted of a combination of assets including CTAs, videos, and logos on their webpage, all of which were relevant to potential buyers from companies using SAP's ERP technology.

When Panaya decided they wanted to expand their reach to target organizations that used Oracle's ERP software, they personalized the above video, CTAs, and images to target that new market, as shown in the second screenshot to the right.

Panaya's use of personalization tools amplified their ABM, and resulted in an increase in content consumption of 113%. They simply defined their audience, the content they wanted to personalize, and the place they wanted to serve that content up. Their real-time personalization tool did the heavy lifting.

### Panaya targeting the SAP market PANAYA **CUT 70% OF ERP UPGRADE** verizon & TESTING EFFORTS Cloud-based automation for SAP ERP & Oracle EBS Customers #1 in ERP Testing and Upgrade Automation Service | 20 SAP Testing CAN be 100 Quick, Simple & Effective Watch Our Video to Learn How SAP Certified COLUMN TWO (KTOR) Everanty time Parage to Dramatically Reduce Suration of ... - 13 February 2013



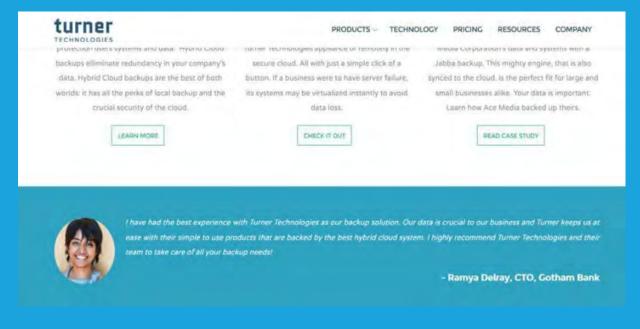
### Personalization and Persona-Based Marketing

Like account-based marketing, persona-based marketing (PBM) helps you target groups of individual buyers with the right content. First, you'll need to define your buyer personas — most marketers will find that they have more than one. These personas, which you'll develop based on the demographics and behaviors of your customers, could be said to represent your ideal buyer.

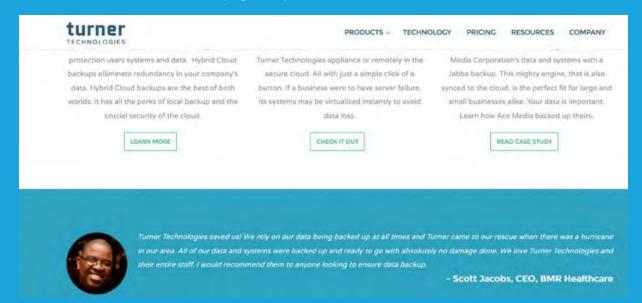
Once you understand the motivations and challenges of your various buyer personas, you can use your personalization tools, along with your marketing automation platform, to determine which messages and content resonate with each general persona. Next, your personalization tools assign personas to visitors, serving them the appropriate content.

Below is a real-time personalization campaign from our fictional data backup company, Turner Technologies. Let's say Turner has identified two of the personas they would like to target: CTOs and CEOs of large enterprises. They've also decided to use personalization tools to serve up two different versions of a customer testimonial on their webpage.

### When a CTO visits Turner Technologies' homepage, they see a testimonial from a fellow CTO:



### But when a CEO visits the homepage, they see a CEO testimonial:



## YOUR REAL-TIME PERSONALIZATION TOOLBOX

So what can personalization tools do for you? Short answer: a lot. But not all personalization tools are created equal. If you're interested in implementing personalization software, here are some of the key capabilities you'll want to keep in mind.

## 1. Target Buyers According to Firmographics and Behavior

Your real-time personalization solution should help you target anonymous visitors easily. What information will the software actually give you on visitors? More importantly, what will you be able to do with this information?

You'll want to invest in a solution that targets buyers according to firmographic information as well as online behavior. The ideal software elegantly combines information on a visitor's potential with information on his intent, matching this information with targeted segments in your personalization campaigns.

### 2. Work Seamlessly with Your Marketing Automation Solution

Let's say you're already using an advanced marketing automation platform, which allows you to collect lead information and more accurately market to your database. You've got a great email nurture program and an even better lead scoring system. How can you leverage all of this information to present the most relevant message to each buyer at the right time?

The most effective real-time personalization software works in concert with your marketing automation: using captured user details from the automation system, the software puts the right message in front of each visitor. In turn, data from your real-time personalization software (like campaign performance and segment) is appended to your marketing automation database.

Reliable information from your marketing automation solution (score, previous interactions, title) is most useful when combined with the customer's position in your funnel.

Combining both sets of insights allows more accurate lead scoring, which in turn results in more accurate email campaigns.

#### 3. Apply Big Data and Predictive Analytics

Big data isn't just about collecting information from a range of databases and sources. It's about reacting to this data while it is constantly changing, turning insights into action. Many solutions offer tremendous data sets, yet lack the ability to turn the data into dollars across channels and devices. Reports and spreadsheets are fine and dandy, but knowing that you've boosted revenue is much better.

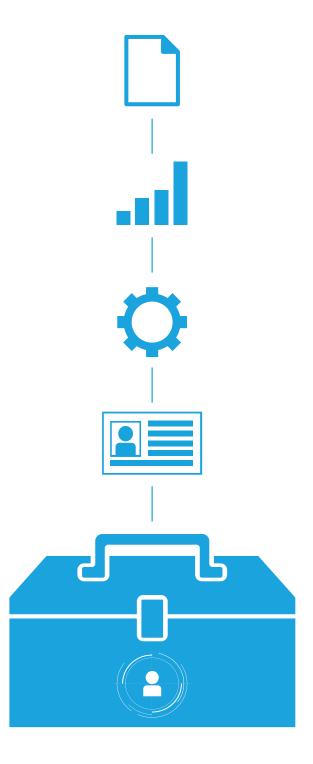
Decisions about how to target, what to deliver buyers, and where to reach them can be complex. How can you be sure you're delivering the right messages at the right times? Real-time personalization software should let you react to your audience's behavior and information, using big data and predictive analytics. It should know how to make every interaction on any channel count — whether through email, web, mobile, or display advertising — at any stage of the funnel.

### 4. Support Any CMS. Any Content. With Zero IT.

Perhaps you are a medium-sized business, with one website built on an open-source system. Or maybe you're a large enterprise, with multiple domains using more than one content management system (CMS). With the wealth of systems to choose from — WordPress, Drupal, Sharepoint, Omniture — your real-time personalization software should work with any CMS, without any IT assistance. After all, you might be using one content platform now, but decide to overhaul in the future. Your software should be as adaptable as you are.

With an adaptable solution, you can scale your personalization efforts across business units and territories, regardless of the technology your content was built with. Ultimately, this means less frustration, cost, and waste for your company.

In addition to the above functionality, you'll also want to evaluate how long it will take your real-time personalization software to bring you value. Some integrations can cost a lot to implement and require coding skills. Others can be implemented with a simple cut-and-paste into your website's html, ensuring that you'll have campaigns up and running within a few hours.



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MEET CONSUMER DEMANDS WITH REAL-TIME PERSONALIZATION

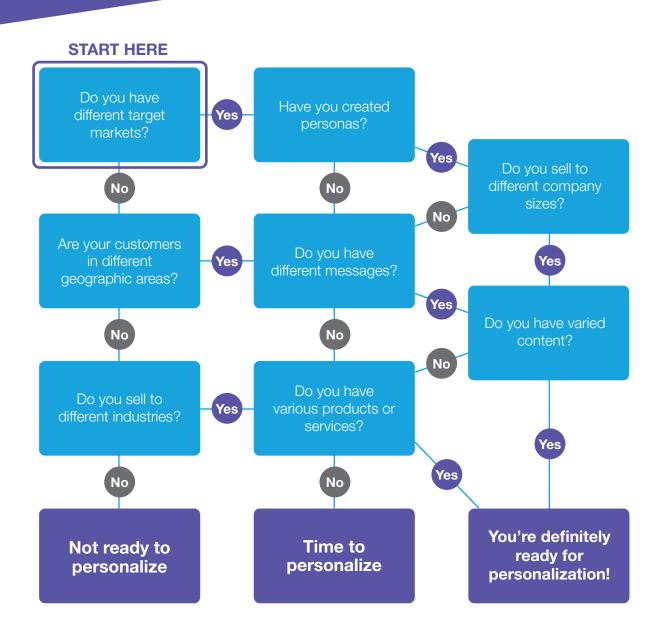
These may be times of increased competition and decreased user attention, but it's also a time of more intelligent, sophisticated technology than ever before. Making real-time personalization tools a part of your marketing strategy doesn't require painful implementation, time-consuming maintenance, or an arsenal of brand-new content. These tools are built to operate and optimize automatically. And that's with zero IT requirements and simple integration with any content-management system.

The ability to create personalized experiences for your audience is a huge breakthrough for marketers. More and more, customers aren't just open to personalized website, email, mobile, and display advertising experiences; they are demanding it.



## **AM I READY FOR PERSONALIZATION?**

If you're considering real-time personalization software to help you create individualized marketing experiences, take a quick look at this chart:



# TOP 10 QUESTIONS TO ASK WHEN CHOOSING REAL-TIME PERSONALIZATION SOFTWARE

	Yes	No
Can it identify anonymous visitors according to their organization?		
Can it identify anonymous visitors according to their industry?		
Can it identify anonymous visitors according to their digital behavior?		
Can it help you optimize your digital advertising?		
Can it "push" information to your marketing automation?		
Can it "pull" information from your marketing automation?		
Can it be integrated with any CMS?		
Can it be implemented quickly?		
Does it react in real-time?		
Does it use predictive analytics to react to a visitor's behavior?		

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