

GUIDE

Powering personalization at scale

Discover how to create personalized
experiences that grow with your business





Scalable personalization is digital marketing's new "Holy Grail"

Personalization is not only a strategy that customers have come to expect, but something that brands lean on to drive engagement and deliver great experiences that connect. One of the major takeaways that emerged from Virtual Marketer Day is that personalization cannot be overlooked and there is a way to start executing for organizations big and small.

As marketers, we've all become increasingly busy over the past several years, putting enormous amounts of energy into the creation, distribution, and measurement of content. After all, to deliver good customer experiences today, we need to produce engaging content and target it effectively across channels and touchpoints. But even after your business has created the needed assets, do you have the right digital experience platform to support delivering the content to the right visitor at the right time in their experience, as well as deliver this at scale.

This is the situation that Wina Wichienwidhtaya, MarTech Strategist at Microsoft, faced when she spent four months building a personalized customer journey via a traditional content management system (CMS), only to discover that their system couldn't support the needed configurations or had the scalability that Microsoft was looking for.

Today, Wina employs AI-powered tools from Sitecore to make robust personalization both possible and scalable at Microsoft, one of the world's largest companies.

This guide will take you through recommended personalization best practices, along with some of the powerful tools that are available to businesses to support personalization efforts. It will help you find ways to cater to customer preferences across demographics to start building and delivering exceptional digital experiences that connect your customers with your brand and deliver a competitive advantage.

Overcoming personalization challenges

3 key challenges to personalization

1. Analyzing large volumes of data
2. Adapting personalization to changes
3. Making personalization scalable and sustainable

What many of us think of as personalization today is largely deterministic, rules-based on single identifiers such as location. It's a relatively simple, but resource-consuming matter to create tailored content for multiple regions, languages, or personas in this way.

But deterministic personalization can only take us so far. Personalization really becomes a challenge when the rules are "fuzzy", or when your team needs to account for multiple intent signals.

For example, a marketer may have to personalize a journey for different roles, product-level interest, and organizational maturity. This is hardly data that can be easily captured by a registration form. We may do our best to capture the visitor intent with a set of rules, but we will still be constrained to a small subset of activities, versus all activity across the site. Analyzing large volumes of data is just one of the many challenges to personalization.

Secondly, deterministic rules are static and do not adapt to changes in visitor behaviors or updates to pages. If your business develops a new product or service, for example, you may have to revisit the entire customer journey, which could well turn into an unsustainable, ongoing cost for even the best-prepared marketing team.

Designing, producing, and then verifying the configuration of these rules can quickly become an operational bottleneck, as the activity will have to be repeated for each variation.

But simply recognizing these challenges is not going to help you overcome them.

Alignment is key

Central to any personalization effort is connecting organizational goals to your digital KPIs. This will ensure that all the teams involved in the process are aligned.

Wina, in her Virtual Marketer Day presentation, compares the role of this alignment to the coxswain of a rowboat. Without this point person controlling the efforts of the rowers, the experience of the boat ride is going to be juddering, slow, and off-course.

If marketing, operations, engineering, and analytics teams are all aligned on the fact that they are dedicated to delivering the same outcome, the chances of achieving this goal will rise dramatically. This outcome must, of course, be measurable and realistic, and aligned to overall company objectives.

Leverage a Goal Map to help you align your organization to the digital KPIs.



What is an Engagement Value?

In order to measure the success of outcomes that teams are all aligned on, you want to understand the value of different digital actions and how those contribute to that shared outcome or goal. Before taking on any personalization project, you will want to determine where different touchpoints or which assets along the customer's journey are delivering value and driving toward that goal.

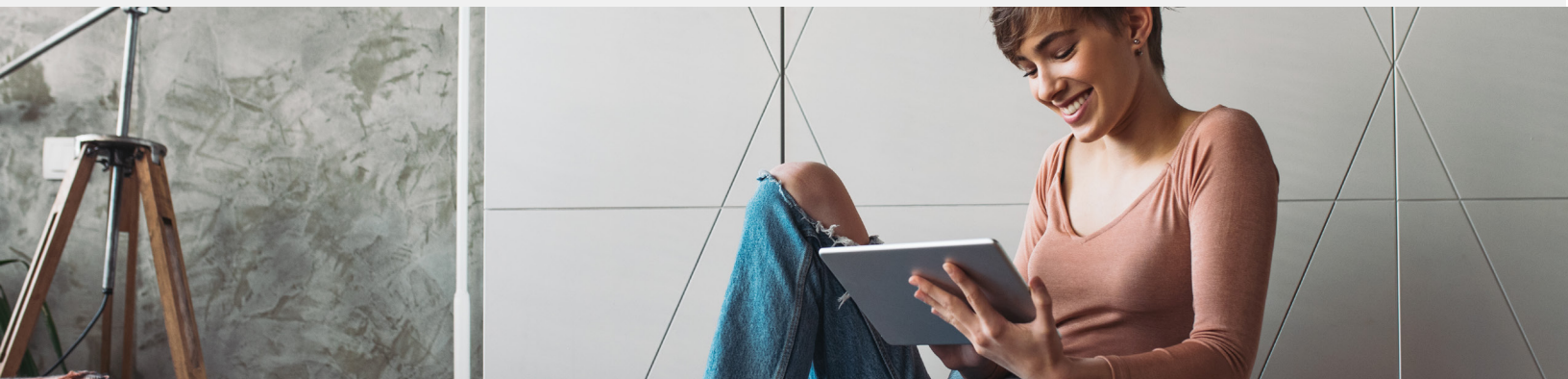
For example, do you want to guide customers toward making a large enterprise software purchase? Do you want them to register for a service? Or do you simply want to encourage them to download a guide that you have produced? This goal makes a significant difference to the personalization project.

When setting up goals, you need to be mindful that different calls-to-action (CTAs), pieces of content and even simple navigation buttons, will have a unique Engagement Value (EV) associated with that goal. A navigational button to get a reader through to the next stage of the journey may have a relatively low EV, while the final "Buy now" CTA may have a score worth several times the total of the first button.

If there are multiple branching paths in your customer journey – for example, both a downloadable guide and a purchase option – be sure to make it clear internally which has the higher score because of the value it delivers to customers and use this information to inform your A/B testing and personalization efforts.

It is also crucial at this stage to build a common taxonomy – that is, ensuring that goals, engagement value and assets are tagged uniformly across sites and channels.

Taxonomy alignment usually starts as an activity to manage the content maintained in a digital asset management system. It is needed to improve accessibility to the content library for both internal teams and external users, and also to leverage AI pattern matching for assigning personalized content to the users who will most likely engage with it.





Start small and iterate

When undertaking a large-scale personalization project, it can be intimidating when trying to determine when and how to start. That's why it is vital that you start small and iterate when it comes to personalization. This might mean only personalizing across a single campaign or subsection of your website. While it might be a small starting point, it will allow you to understand a base level of effort, better manage time and resources, and maximize the likelihood of success – even if it is at a small scale – and gather insights, learnings, and routes to optimization.

Once you experience your first success, you can use gathered data to inform future projects and move forward to the next phase. And then, when it comes to scaling your personalization efforts, you will have a well-documented set of lessons learned and tactics to employ across other digital channels.

Scaling personalization





Simplifying and automating personalization with AI

Once you reach a certain traffic volume, profile count, or the next stage in a growth plan, you may find that you have pushed the limits on how your DXP can aide in manual personalization

Using the auto-personalization functionality of Sitecore AI, businesses at this level may find that managing, distributing, and testing large asset libraries across a variety of audience groups becomes much simpler. Wina and the Microsoft Partner Network certainly found this to be the case, using Sitecore AI to deliver targeted experiences to a constantly evolving audience of visitors and customers with various needs.

Microsoft Partner Network and Sitecore AI

With over 6.6 million unique visitors per year across 11 languages, 450 global pages and 35,000 assets, the personalization challenge for the Microsoft Partner Network team was daunting.

To make data gathering and personalization even more difficult, only about 29% of visitors actually authenticated when using the site, meaning the team initially struggled to identify where to target assets.

To overcome this, the team took advantage of pattern matching, identifying unique user paths and inferring from cues such as pages visited to generate a usable profile, even if users didn't sign in.

From here, the Microsoft Partner Network team piloted Sitecore AI (the first business to do so) on six pages and 38 variations – included different CTAs, length of content, and graphics.

The team found that, instead of having to set up dozens of personalization conditions per page, they only had to set up the initial six, which simplified the configuration effort. All 38 variants received good visitor impressions – something the team rarely saw when setting up the rules manually.

In the end, the team saw a roughly 16% uplift in average EVs in the winning algorithm, with many of these CTAs performing better than static content. They also benefitted from an approximate 30% reduction in design and configuration time.

An AI success story

Wina and the Microsoft Partner Network team have utilized Sitecore's AI tools to great effect, transforming a large library of content into millions of powerful individual experiences.

While each organization will approach personalization differently and have a unique journey to mature personalization efforts, Wina suggests taking the following actions for those looking to start their transformation:

- Invest in the personalization platform and tooling
- Connect organizational goals to your digital KPIs
- Understand your audience and build a common taxonomy
- Start small and simple, iterate, measure, and then scale
- Automate personalization further with Sitecore AI

For more details on how to move your personalization forward, download our guide "[How to Gain Quick Wins and Personalize Successfully](#)" [here](#).

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About Sitecore

Sitecore delivers a digital experience platform that empowers the world's smartest brands to build lifelong relationships with their customers. A highly decorated industry leader, Sitecore is the only company bringing together content, commerce, and data into one connected platform that delivers millions of digital experiences every day. Leading companies including American Express, ASOS, Carnival Cruise Lines, Kimberly-Clark, L'Oréal, and Volvo Cars rely on Sitecore to provide more engaging, personalized experiences for their customers.

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