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Delivering Personalized Content

for
dummies[®]
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Offer great digital
experiences

Map the customer journey
across touchpoints

Scale up with
the cloud

Adobe
Special Edition

Stephanie Diamond

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Delivering Personalized Content

Adobe Special Edition

by Stephanie Diamond

**for
dummies®**
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Introduction

The year 2020 finds the world living through a pandemic. With some exceptions, like the heroic responders, many people are sheltering in place. One of the key ways they can connect with others is through technology. If, as a brand, you need to be convinced that personalized experiences matter, this experience should persuade you.

People are craving a connection. They want to know that you understand who they are and offer an experience that will lighten their mood or help meet their needs. If you can't speak to people as individuals, you may permanently lose them as customers. This matters now, more than ever.

About This Book

Welcome to *Delivering Personalized Content For Dummies*, Adobe Special Edition. This book shows you how to build a digital foundation to deliver personalized experiences at scale.

I cover several topics, including the following:

- » Understanding why personalization matters
- » Using a single platform to develop a digital foundation
- » Mapping your customer journey
- » Focusing on what data to track and measuring success
- » Utilizing the cloud to scale up and deliver great experiences using artificial intelligence (AI) and machine learning (ML)
- » Ten personalization challenges faced by brands

Icons Used in This Book

Throughout this book, icons highlight important information. Here's what they mean:



TIP

The Tip icon highlights information that can make doing things easier or faster.



REMEMBER

The Remember icon points out things you need to remember when searching your memory bank.



WARNING

The Warning icon alerts you to things that can be harmful to you or your company.



TECHNICAL
STUFF

Sometimes I give you a few tidbits of research or facts beyond the basics. If you like to know the technical details, watch out for this icon.

Beyond the Book

This book will help business leaders like you discover more about personalization. If you want resources beyond what this short book offers, visit these links to discover more about the following topics:

- » **Digital foundation:** <https://www.adobe.com/experience-cloud/use-cases/digital-foundation.html>
- » **"Digital Trends" report 2020:** <https://www.adobe.com/offer/digital-trends-2020.html>
- » **Content marketing:** <https://www.adobe.com/experience-cloud/use-cases/content-marketing-velocity.html>
- » **Content personalization:** <https://www.adobe.com/experience-cloud/use-cases/content-personalization.html>
- » **Customer intelligence:** <https://www.adobe.com/experience-cloud/use-cases/customer-intelligence.html>

- » Recognizing why personalization matters
- » Evaluating your current reality
- » Understanding the Digital Foundation Model

Chapter 1

Understanding the Importance of Great Digital Experiences

Just imagine if you could listen in on the silent conversation your customer has with your brand touchpoints. You'd hear what they think when they read your content, find you on social platforms, and see what others are saying about you. If you could tap into your customer's needs and wants, you could give them exactly what they want at the moment they want it. That's a tall order. It's one that requires the right strategy, technology, and people to get the job done.

This chapter shows you why personalized experiences are no longer optional and how you can create a digital foundation that will help you build lasting relationships with your customers.

Getting Started

So where are companies today? Brands are in a fierce fight to differentiate their products and services; they need to capture attention and meet rising customer expectations. To do this, brands

need to learn about their audiences and their interests, as well as to engage them in personalized ways across channels. They should make recommendations that encourage customers to come back and keep coming back. If they don't make relevant information available at each stage of the customer journey, their competitors will.

Fortunately, with a strong digital foundation, personalization is more feasible than ever before. Consider some of the changes that have made this possible — and necessary:

- » **Commoditized products:** You can buy almost anything online. Products have become commoditized. Now the job of a brand is to differentiate themselves by delivering unique customer experiences. Personalizing content builds loyalty and removes friction that keeps the customer from quickly moving to competitors.
- » **More sophisticated search tools:** When people first began using the web for business, they would start searching at a company home page and move around by clicking the links you set up for them. As users grew more sophisticated, and Google emerged as a ubiquitous search engine, consumers could search for things without following the path you set. They could use different devices and forge their paths in their own time from anywhere. Searching became a self-serve model. Brands were no longer in control.
- » **Availability of data in real-time:** Now that companies can capture data and make improvements in real-time, consumers have raised expectations about what they will experience. They have grown to expect an “Amazon-like” personalized experience from all the brands they do business with. If they don't get it, they move on.
- » **Marketers who are empowered to create and publish without IT:** Now that marketers have tools that don't require them to rely on the IT department, they are free to experiment and make changes themselves.
- » **Technologies like artificial intelligence (AI) and machine learning (ML) that have changed a company's ability to analyze and use predictive analytics:** These and other tools allow brands to scale up and deliver better, more personalized and relevant content without needing human intervention.



TIP

According to projections from McKinsey's Global Institute, personalization at scale has the potential to create \$1.7 trillion to \$3 trillion in new value.

Delivering on your customer-centric mindset

When you think about delivering outstanding customer experiences, you likely imagine all the “wow” things you can do to amaze your customers. Those things are important, but taking a customer-centric approach requires you to flip from thinking about your message to thinking about what your customer wants to know at every point in their journey and how they can accomplish their goals.



TIP

Data from the Gartner “2018 State of Personalization and CMO Spend Survey” found that consumers appreciate “*tailored help*” that includes: 1) Direct me: Help me find the product that solves my problem; 2) Teach me: Show me the relevant options; 3) Reassure me: Help me make the right decision; and 4) Reward me: Give me a better deal.

Customers start with the idea of *relevancy, convenience, and respect for their privacy*, and they want you to deliver experiences that tell them you:

» **Know who they are**, where they are located and in what timeframe they interact with you (hour, day, and so on).

Example: They want you to know their location and the timeframe in which they shop so you can send them a coupon from their preferred branch of the store for a product they have bought or browsed before.

» **Know their interests** so that you can deliver the most relevant information and product or service recommendations.

Example: They want you to know that when they log on to your website, they appreciate an experience that relates to their previous browsing behavior and highlights special offers (for the last items they browsed). Consumers also enjoy learning about a product that is complementary to one they previously bought — like an ink cartridge for the printer they purchased.

- » **Are able to display an engaging experience across all their devices, whether desktop, phone, or tablet**, so there is no disruption in their interactions with you when purchasing products or getting information.

Example: They want you to recommend products to them and make sure they can easily order from their mobile device, then check for delivery updates on their iPad.

- » **Eliminate friction caused by moving across channels** so they can carry on a cohesive conversation with your brand.

Example: They want you to know that if you engage with them about customer service on Twitter, they can pick up the conversation on your website's support page.

- » **Know which channels they prefer** and how they found you so you can be where they are when they need you to help them decide.

Example: They want you to know which channels they use so you can make sure to deliver the information they need from that specific channel. If the customer likes to access forms from your app, make sure all necessary forms are available there.

- » **Will responsibly use their customer data** in ways that ensure privacy and security.

Example: They want you to know that they appreciate a personalized email about their financial well-being, but that their information must be protected with the highest level of security.



TIP

One goal of personalization is to help make product decisions *easier* for customers. By helping them determine what their best choices are, they'll reward you by becoming loyal customers and potential brand advocates.

Identifying your personalization and business goals

To start building your digital foundation, you need a plan to set your goals and assess your current status so you know what needs to be done. Then you need to decide which key performance indicators (KPIs) you will track. You want to ensure that you keep your overall business goals in mind as well as specific personalization goals. (For more about using KPIs and analytics, see Chapter 4.)

Assessing Your Current Reality

To understand your current ability to deliver personalized experiences, you need to ask questions that will determine where to put your focus. Here are several to consider:

- » **Customer profiles:** How complete a view do we have of our customers and their interactions with us? What internal data and third-party data is available to us?
- » **Single content platform:** Do we have a central source to design, launch, and measure campaigns?
- » **Security:** How secure are our experiences?
- » **Privacy:** How personal is too personal? Do we know what privacy concerns our customers have?
- » **New media and channels:** How prepared are we to incorporate new or emerging media and channels in our experiences?
- » **Efficient processes and collaboration:** How efficient are our processes? How well are we collaborating with other teams?
- » **Updating and adaptability:** How adaptable are our experiences? How easy is it to create and update these experiences?

Introducing the Digital Foundation Model

Developing great personalized experiences requires you to take several steps to achieve success. After you have done the hard work of assessing where you are now, you need to look at the next steps to take to build a strong digital foundation. Here are four steps you can follow using the Digital Foundation Model (see Figure 1-1):

1. **Create content and manage assets.** At this step, look at the tools you need to structure and manage digital assets from a single platform to deliver exceptional experiences. Also consider the team you need to put in place. (See Chapter 2 for more details.)

2. **Deliver contextual experiences across channels.** During this step, look at mapping your customer journey across all your touchpoints to deliver an omnichannel experience. (See Chapter 3.)
3. **Optimize experiences by tracking, measuring, and making changes based on results.** At this step, look at evaluating the data you are tracking to determine if you are successful and what you need to do to improve. (See Chapter 4.)
4. **Scale-up by leveraging the cloud as well as AI and ML.** During this step, leverage the cloud and use artificial intelligence and machine learning to extract insights that help you create improved customer experiences. (See Chapter 5.)



FIGURE 1-1: The Digital Foundation Model lets brands create, deliver, and optimize digital experiences at scale.

- » Working from a single digital platform
- » Creating content for use across channels
- » Understanding the roles of team members

Chapter 2

Creating Content and Managing Assets

When deciding what kind of personalization software you should bring into your organization, you'll likely have several needs. You need a digital foundation that will unify siloed data to create an integrated view of the customer, manage content, and simplify workflow execution to facilitate cross-channel delivery, measure and test, and scale up experiences as necessary.

This chapter shows you the value of using a single integrated platform to create and manage content. You also look at the roles played by the team members who are responsible for developing great customer experiences.

Using a Single Platform

A single cloud-based platform allows you to centralize all your content and digital assets to operate as a “single source of truth.” The next two sections show you the technology you need to deploy to create and manage your content to deliver engaging, contextual experiences.

Managing digital assets

The software that creates and retrieves your digital assets is called a *digital asset management system (DAM)*. Here are just a few of the processes a DAM facilitates:



REMEMBER

» **Design:** Your creative team works in the design programs of their choice to create images, infographics, text, and so on. Those assets then must be broken down into small pieces (sometimes this is referred to as *atomized* content). They can then be brought back together in various configurations to suit the needs of campaigns and events.

Without a centralized repository, designers would need a duplicate asset residing on each web location. That might require thousands of copies of the same image, and someone would have to go to each place to update it. Doing this would be virtually impossible. Designers need to be able to revise the asset once and find it quickly when it's needed again.

» **Templates and style guides:** Templates and style guides must be available to designers, so they don't have to reinvent the wheel for every new asset. Brand guidelines ensure that everything created uses the right colors, logos, and sizes.

» **Governance:** Those assets also must have a governance system in place to ensure that the team uses the most up-to-date version and only allows authorized people to view it. It also helps manage legal rights and permissions (like expiration dates).

You need to automate these processes without the assistance of the IT department. Designers can't wait for IT schedules or other delays to hamper their efforts to get things done quickly and efficiently.

Creating content experiences

After looking at what you need to manage digital assets, consider using software that can deliver personalized experiences. A *content management system (CMS)* assembles the right personalized content for each part of the customer journey. Here's what a CMS facilitates:

» **Content personalization:** To deliver the right experiences, your CMS utilizes data from the entire customer journey. It then tailors the experience depending on who the customer

is and what they are trying to accomplish. (For more on capturing the right data for personalized content, see Chapter 3.)

- » **Omni-channel delivery:** Your data must be used across channels so that anyone can access it. The CMS formats it correctly for any channel or device.
- » **Dynamic deployment:** A CMS allows dynamic deployment of content so that it is both changeable and reusable for all the different events, pages, channels, and activities. Because IT doesn't need to be involved, you can create whatever you need quickly and easily.
- » **Content publishing:** Publishing content is done as a planned activity and on the fly to support real-time changes. Your CMS ensures that you always publish the correct content across pages, locations, and channels whenever it's needed.



TIP

According to eMarketer (2020), both marketers and IT departments agree that the top three priorities for a good CMS are flexibility, ease of use, and integration with other systems.

Looking at the Roles of Team Members

Creating great customer experiences involves utilizing the right strategies, people, and technology. The team you choose to work on your personalization efforts is critical to its success. Both business and IT stakeholders from online and offline channels must work together.



TIP

Collaboration is one of the keys to successful personalization efforts. All team members must agree to work together. This has not always been the case. Siloed departments are often hesitant to share information. Make sure to involve all stakeholders at the start of your project and throughout its implementation. For example, setting shared key performance indicators (KPIs) across teams can encourage collaboration.

Getting buy-in from executives

It's crucial to get buy-in from executive-level sponsors. You need to make sure that the people who control the direction of the company understand the value of personalization. You also

want to have a designated “owner” of the project who will keep all departments apprised of ongoing progress. They can often act as a change agent, driving meaningful change in an organization (which can be very rewarding).

Considering team members

Each team member plays a vital role in creating relevant experiences. Consider the purpose of each team member and what they want from a single platform:

- » **Marketing:** Marketers want to focus on quickly delivering successful campaigns. They create the strategy and design the experiences that will meet campaign goals and prove return on investment (ROI).

What they want from technology: They need technology to help them stay on brand, increase conversions and improve customer loyalty. They must be able to get content out fast without needing IT support.

- » **Creative team:** Creatives need to design assets that support all initiatives. They create the designs used for all brand efforts.

What they want from technology: They use technology to help them improve productivity and collaboration when creating engaging content assets. They also need to be able to locate the right assets when they need them, which includes rules for governance (how the assets can be used and by whom).

- » **IT:** The IT department makes sure the entire team has the technology it needs to deliver an exceptional experience across channels and devices efficiently. IT wants to ensure that systems are stable, perform as required, and can be set up and maintained efficiently.

What they want from technology: They use technology to meet security and risk requirements. They also need the flexibility to innovate when new media or channels arise.

- » **Data analysts:** Analysts take on the complex task of evaluating and extracting essential insights from the data collected.

What they want from technology: They use technology to create reports and analyze data to help marketers and others evaluate, improve, and guide future campaigns. Artificial intelligence (AI) and machine learning (ML) make their job much easier.

- » Choosing which data to collect
- » Defining the customer journey
- » Looking at a company success story

Chapter 3

Delivering Contextual Experiences Across Channels

Do you know what your customers expect from you? They want a great, friction-free experience that gets them the relevant content they need on any channel or device they are using. Delivering a personalized experience is critical to making your brand the one they turn to for products and services. It's now the differentiator that matters the most.

This chapter shows you how to collect information about your customers and analyze the customer journey across all *touchpoints* (interactions) to deliver a great contextual experience.

Implementing Customer Experiences

Great customer experiences start with the right data and the platform to collect and analyze that data. Right now, you likely have lots of important customer data. But it's stuck in silos and doesn't give you the unified customer profile you need to deliver personalized experiences. This section shows you the data that you need to capture so you can build relevant experiences.

What data do you need to collect? To be able to interact with customers on a “one-to-one” level, you need to collect all the data clues they leave for you — on your website, landing pages, social media platforms, advertisements, campaigns, and transactions, as well as from second- and third-party data sources where possible. Here are the types of data that will help you build a unified profile of your customer:



TIP

» **Demographic data:** This data tells you *who* your customers are. It's the data you are probably most familiar with. It includes gender, age, income, and so on.

» **Psychographic data:** This data tells you about the *why* of customer preferences, their likes and dislikes, and values.

Psychographic data helps you present content that displays the right empathetic tone for your customer. It involves using the best colors and language that will suit a particular person.

» **Behavioral/interaction data:** This data tells you *what* customers do. It shows you how they interact with your brand touchpoints, which content they consume, and from where. This type would include historical data.

» **Contextual data:** This data tells you *how, where, and when* your customers are interacting with you. This includes recognizing the devices they are using, the platforms and sites they are coming from, and their timeframe — month, year, and time of day. (For more about tracking and measuring data, see Chapter 4.)



TIP

According to the 2018 Pulse Check by Accenture, 83 percent of consumers will share data with brands to enable a personalized experience as long as it's made clear what the data will be used for.

Analyzing the Customer Journey

Do you wonder why you should take the time to analyze and map a customer journey before you start? Wouldn't it be easier to create content, place it on several platforms, and see what happens?

Not really. Your entire team derives several benefits from thinking through the customer journey before you get started:

- » **As the team looks at a complete customer view, they gain insights into behaviors, desires, and preferences.** These insights can then be built into the content and experiences you create, making it more relevant, and delivering it at the right time and place from the start.
- » **When you evaluate touchpoints, you can see in context and in real-time what content would meet customer needs.** Doing this gives you the ability to look at the content as the customer would. You can see what matters most in that context.
- » **Mapping the customer journey lets you analyze the big picture of what you need regarding technology and budgets.** This information helps you prepare the resources you need up front and shows you the magnitude of the project as a whole.



REMEMBER

You should continue to iterate once you've created the customer journey map. It can't remain static. As conditions change, you need to make revisions.

Mapping the customer journey across touchpoints in context

Before you start creating personalized experiences, you need to map out your customers' entire journey. Mapping a customer journey involves targeting all the potential touchpoints (both online and offline) that your customer has with your company on different channels, devices, and locations on their way to potentially buying your product or service.

The typical customer journey consists of the five stages shown in Figure 3-1.

- » **Awareness:** At this stage, the customer becomes aware of a want or need and begins to look for solutions.
Typical touchpoints: Search engines (including mobile and computer), landing pages, social media platforms, and blogs.

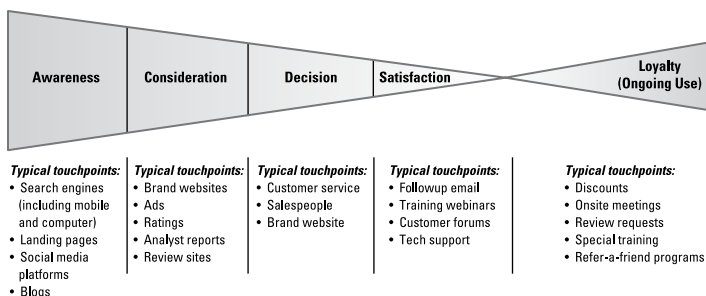


FIGURE 3-1: The modern five-stage customer journey.

» **Consideration:** During this stage, the customer begins to narrow their choices and looks at specific options and prices.

Typical touchpoints: Brand websites, ads, ratings, analyst reports, and review sites.

» **Decision:** At this point, the customer looks at comparisons and makes a final choice to buy.

Typical touchpoints: Customer service, salesperson, and brand website.

» **Satisfaction:** This stage happens after the purchase. You want to make sure the customer is happy and doesn't experience buyer's remorse.

Typical touchpoints: Follow up email, training webinars, customer forums, and tech support.

» **Loyalty (ongoing use):** At this stage, you want to encourage your satisfied customer to become a brand advocate.

Typical touchpoints: Discounts, onsite meetings, review requests, special training and refer-a-friend programs.



TIP

For more about how the customer journey is enhanced using artificial intelligence and machine learning, see Chapter 5.

Working across channels

Every channel is accessible from multiple devices and locations, at any time, so it's imperative to deliver a cohesive message across all of them. This includes websites, web apps, email, mobile devices, and more.

A SUCCESS STORY: PHILIPS

Brands want to create exceptional customer experiences because they know it will help them improve their return on investment (ROI), deliver personalized experiences, and encourage customer loyalty. When Netherlands-based Philips, the global healthcare technology company, wanted to simplify, standardize, and formalize its digital marketing across the entire organization, the company chose Adobe.

Philips had three main objectives. It wanted to standardize digital experiences across local and global properties, support collaboration among teams to better respond to customer and business needs, and create a data-driven marketing culture. This is a tall order for a company whose presence reaches customers in 79 markets and 38 languages, and its 1 million pages receive more than 260 million visits and 1.4 billion views annually.

After the project concluded, Philips reports that by using Adobe's enterprise marketing tools as its digital foundation the company achieved several key results. These included transforming properties, accelerating translation, cutting costs by 90 percent, and automating daily updates, including product images and videos. Philips not only cut costs, but believes it now has a data-driven test-and-learn culture.

The key to delivering an exceptional experience is an *omnichannel approach*. Previously, marketers used a *multichannel strategy*. They developed messages for each channel but didn't ensure that the experience was cohesive when users moved from one channel or device to another. That's why an omnichannel approach is required. Using the right tools, you can deliver a customer experience that is personalized for each individual regardless of the touchpoint they use.

Recognizing Best Practices

If you are just getting started with personalization or you want to improve what you are doing, here are seven best practices to consider:

- » **Meet customers where they are.** Customers have different needs. If you look at the devices they use, the channels they



WARNING

prefer, and their interests, you can tailor an experience that suits their preferences. When you meet their needs, they have no reason to switch to your competitor.

- » **Shorten the path to value.** Convenience and relevance are two critical factors for all customers. If you can quickly get them what they want, you become a valued brand. Learn what they want and make it easy to find, and you'll be rewarded.

Customers consider long wait times a sign of a poor experience. Optimize your website and your other properties so that technology does the heavy lifting and takes the load off other channels.

- » **Let artificial intelligence (AI) do the work you don't want to do.** The way to eliminate tedious work is to let AI automate manual tasks. Use software that integrates AI to speed things up and produce better results.

- » **Help marketers and IT understand that they can move faster if they pull together.** You no longer have the option to wait until your project comes to the top of the IT department's to-do list. You need to utilize a content management system (CMS) that lets the marketing and IT departments work simultaneously on innovating experiences as well as editing, creating, and measuring content.

- » **Create one dynamic experience that flows freely across channels.** You can't determine the path your customer will take to interact with your brand. Be consistent and make sure your brand tells the same story across all the touchpoints your customer will encounter. The right digital foundation enables you to have a conversation with your customers that is not impeded by the device, location, or channels on which it is displayed.

- » **Let a modern workflow make you a success.** The never-ending need for new content and unique experiences ensures that if you don't have a streamlined workflow and improved velocity, you won't be able to meet the demand.

Putting the right digital foundation in place allows you to quickly create on-brand content from templates, find and deploy the relevant assets, and publish them to any channel in real-time.



TIP

- » **Use analytics to guide you in the right direction.** Using analytics to pinpoint things you can change or revise is critical to providing relevant experiences and meeting business goals. Chapter 4 discusses selecting key performance indicators (KPIs). Continuously evaluate them and see what you can improve.

- » Tracking your data
- » Utilizing analytics software
- » Looking at key performance indicators

Chapter 4

Optimizing Experiences by Tracking and Measuring

Before you ever sell a product or service, you are using an experience to build a customer relationship. To do this, you need to track and measure all the data clues that customers leave for you during these experiences so that you can serve up ever more relevant personalized experiences in real-time. You also need to analyze your data to determine whether you are meeting your business goals. According to Gartner, industries now consider data and analytics “competitive weapons.”

Your data is an asset that continues to increase in value as new channels and media become available. You must consider all the ways you can invest in your data to give your company a competitive edge. A powerful marketing analytics solution can be a force multiplier that enables your brand to be more effective in everything it does.

In this chapter, you look at evaluating key performance indicators (KPIs). You also see what you need analytics software to do to optimize your data to deliver great personalized customer experiences.

Utilizing Analytics Across the Enterprise

The best personalized experience is the one that is invisible to customers. The experience you deliver is only as good as the data you collect and the tools you use to analyze it.

Looking at analytics software

Every company is on a different trajectory when it comes to using their data effectively. Legacy systems and disparate data can make it difficult for you to use all the data you have effectively. To do so, you need analytics software that will enable you to:

- » Unify siloed data from all the sources (online and off) to collect and normalize the data. Doing this allows disparate formats (both structured and unstructured) to be brought together. Then, all the data trapped in silos becomes usable across the company.
- » Extract insights and make recommendations using artificial intelligence (AI) and machine learning (ML) without requiring the intervention of the IT department. The analytics software can compare data sets and “what if” scenarios to recommend the right experience for each customer. (For more on AI and ML, see Chapter 5.)
- » Provide flexible reporting that allows users to understand and analyze the data in any way they need to.
- » Use automation to act efficiently on the insights you uncover.
- » Test and deliver improved personalized experiences at scale to optimize campaigns in real-time across all interactions.
- » Use lookalike modeling with machine learning to identify new audiences. It helps you use the data you have to find those with similar traits, thus expanding your search.



REMEMBER

Check to see whether the analytics solution you are considering can be integrated with data sources like your customer relationship management (CRM) system. Your software should accommodate all the other tools in your tech stack.

Tracking the right data

To know whether you are successfully delivering the right personalized experience and meeting your business goals, you need to establish metrics upfront that will indicate whether your efforts are successful or not. If you have done a good job of selecting these KPIs, you can spot mistakes and change course quickly.

Be sure that you have integrated all your data from disparate sources as shown in Figure 4-1, so that no insight is left behind.



FIGURE 4-1: Tracking all your data sources.

Sources include: customer relationship management (CRM) data, ad impression data, campaign data, point-of-sale (POS) and commerce data, third-party data (databases collected from other entities), second-party data (including social platforms), behavioral data, product usage data, and voice of customer data.

Evaluating Your KPIs

So, what exactly are KPIs? They are the measures that you want to track to reach your most important customer and business goals. Over time they help you determine such things as whether:

- » Your investment in technology that delivers the right personalized experiences is paying off
- » Your business decisions are based on real evidence instead of gut instinct
- » All your departments are working together to achieve success, rather than working at cross purposes



REMEMBER

KPIs should be agreed upon across teams and always align to corporate objectives.



TIP

Once you have assembled all your KPIs, find out if you are already tracking them. Also, make sure to benchmark all your KPIs to know where you are starting from.

Typical KPIs include such things as:

- » Growth of sales revenue
- » Increased customer engagement
- » Improved retention and customer loyalty
- » Increase in upsells and cross-sells
- » Increase in customer satisfaction



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Are you curious to know what KPIs other marketers use to measure the success of their customer experience efforts? According to the “2019 Customer Experience Survey” by Ascend2 and Research Partners, the top three metrics marketers chose are:

- » Sixty-five percent chose customer retention rate.
- » Sixty-five percent chose customer satisfaction.
- » Forty-one percent chose customer lifetime value.

Consider using these metrics to give you a good start in determining if you are meeting your business goals.

- » Using the cloud to scale up
- » Deploying artificial intelligence and machine learning to gain insights
- » Looking at where to go to learn more

Chapter 5

Scaling Up With the Cloud

Delivering personalized experiences at scale is critical to business growth. Scalability should be a key part of any personalization platform you choose. Depending on the size of your personalization efforts, you might be dealing with a complex set of locations, platforms, and personas. For this reason, it's important that you put in place the right technology to support the variety of contextual experiences you need to deliver.

In this chapter, you look at using the cloud to scale your personalization efforts and see how the use of artificial intelligence (AI) and machine learning (ML) can help you extract valuable insights from your data to deliver an omnichannel experience.

Making Use of Cloud Capabilities

You can't overemphasize the value of using the cloud to deliver experiences at scale. You need to focus on innovating and delivering relevant customer experiences rather than concerning yourself with whether your systems can support your efforts. Here are

some of the benefits that you derive from using cloud software for personalization:

- » **Reduced costs:** You don't need to worry about whether another capital expenditure is lurking around the next corner. You will always have the latest version — there are no expensive upgrade efforts from one version to the next.
- » **Safety and security:** In these uncertain times, you need to be sure that your valuable data assets will not be destroyed during a crisis. Using the cloud ensures that your data is safe and that you will be able to quickly recover if disaster strikes because you have the latest security updates.
- » **Flexible access across channels:** Using the cloud ensures that your data is accessible across all your channels and that work can continue to be accessed by employees and anyone you designate at the time they need it. Vendors and partners, as well as team members, can access the assets they need.
- » **Easy access to updates:** Using the cloud makes updates available without shutdowns or delays. There is no need to get IT involved so everything moves quickly.



TIP

Using the cloud ensures that you'll always be able to scale to meet the demand.

Getting to Personalization at Scale

Most every brand acknowledges that you need to be able to meet demand by having the ability to scale. However, brands should keep several things in mind when scaling up their personalization efforts. Here are some issues to consider:

- » **Utilizing data:** When you scale up, siloed data is a problem. With siloed data, it's difficult for everyone to find the information they need, and you don't get a true picture of your customers and the state of your business. Rather than trying to amass more and more data, carefully evaluate what you have to determine whether you are getting a cohesive story or that the data is siloed or incomplete.
- » **Maintaining privacy and security:** Not all data is created equal. Customers have the right to keep sensitive information

like medical details out of a company database. They also expect that brands will protect the security of their data.

- » **Optimizing design:** Make sure that your software has created “atomized” content (modular) that is broken into smaller entities that can be mixed and matched as needed. (For more on atomized content, see Chapter 2.)
- » **Deciding on actions:** Rather than relying only on typical holiday and other promotions, you also want to be able to create experiences that are triggered by specific customer actions.
- » **Testing to revise and improve:** When conducting tests, ensure that you can deliver the right data to the right people at scale.

Developing Insights Using Artificial Intelligence and Machine Learning

As I discuss in Chapter 3, mapping the customer journey is critical to the success of your personalized experiences. The content you create for the journey is based on several variables like the stage the user is in, which device they are using, and where they were referred from (touchpoints like other websites, social media platforms, and so on). To process the millions of variables that are created, your analytics solution must be able to use artificial intelligence (AI) and machine learning (ML) to see patterns and make recommendations.



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What do these tools do? AI and its subset ML let computers take actions that they haven't been programmed to do. In effect, the program “learns” on its own. It is perfect for analyzing large data sets, grouping segments, finding trends, delivering conversational responses (through chatbots), and creating personalized experiences.

What makes these tools so valuable? Millions of pieces of data are extracted across the customer journey. Because of the complex nature of the data, it is impossible for humans to manually evaluate and make predictions about the potential offers and experiences each customer could receive in real-time. That's where AI and ML come in. These tools allow you to analyze all the data

created at each touchpoint, extract valuable insights, and act on those insights to deliver personalized experiences in context for each individual.



REMEMBER

Using an integrated single platform as your digital foundation ensures that the insights you get from AI and ML can be scaled up across all your channels to improve interactions in real-time.

Getting What You Need from AI and ML

AI has been hailed as a revolutionary technology because it allows people to focus on the essential tasks while relegating the data crunching to computers. To get the most from AI, make sure to deploy technology that analyzes three types of intelligence:

- » **Content intelligence:** The technology you use should give you the ability to structure content in the right way for different channels, but also understand what's in that content and what the context is.
- » **Creative intelligence:** Your technology must be able to understand how to interpret images, illustrations, and other creative assets to create even more advanced experiences like animations and 3D designs.
- » **Experience intelligence:** The technology you use must be able to deliver personalized experiences in real-time and make recommendations. For example, on the basis of your behaviors, interests, and occupation, you can be shown a sale on tall ladders that are meant for outdoor use versus ladders for inside the home.

Looking at What's Next

This book shows you how to implement a digital foundation for personalization. For more information, you can check out <https://www.adobe.com/experience-cloud/use-cases/digital-foundation.html>. Here you will learn more about how the right digital foundation can help you digitally transform to win customer hearts, minds, and wallets.

- » Acknowledging privacy concerns
- » Capturing data at scale
- » Extracting data insights

Chapter 6

Ten Personalization Challenges and How to Address Them

Most brands understand the need for great personalized experiences, but many have trouble putting it into practice. Here are ten challenges and what brands can do about them:

- » **Understanding customers' needs:** Companies have always struggled to find out everything they can about their customers' needs and desires. Analytics software makes it possible for companies to understand what their customers really want without having to guess. This drives personalization.
- » **Dealing with the exploding demand for content:** To support the ever-growing need for new content, brands need to find more efficient ways to develop and manage content. Software that can use artificial intelligence to repurpose content and create more efficient workflows can help meet this demand.
- » **Dealing with a culture that is slow to adopt change:** Corporate culture has always had a significant impact on how brands can transform themselves into data-driven enterprises. The right organization and alignment of teams

and training can help organizations implement personalization by assisting them to collaborate and be more efficient.

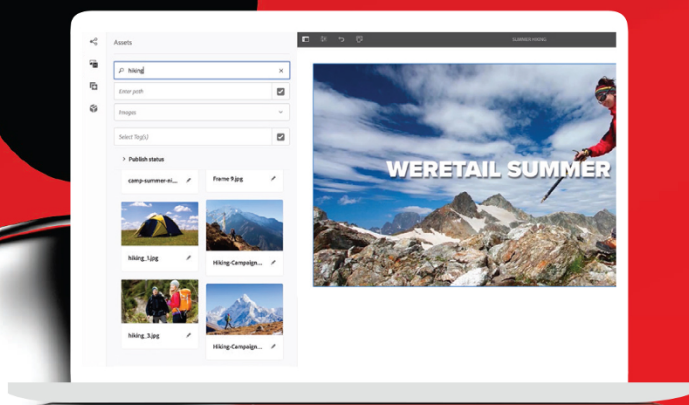
- » **Delivering consistent experiences:** Brands find it challenging to deliver consistent experiences across all channels. To address this issue, you need to use software that can identify the user across channels and adapt the experience based on the user's behavior on each channel.
- » **Dealing with data regulations and compliance:** A tightening of ways data can be used, as indicated by the General Data Protection Regulation (GDPR) and other compliance rules, makes it important for brands to ensure they are not violating privacy laws. You need a system that makes sure you're up to date and compliant.
- » **Being prepared for new channels:** To deliver a cohesive experience across channels, brands need to make sure that all their content has a consistent message. What gets trickier is the need to make sure that the content assets for each channel match the visual requirements and work together. If you atomize your content (break it into single small chunks) and use the right platform to manage it, you can be ready for any new channels that come along.
- » **Understanding how to measure customer data for insights:** Many brands have difficulty extracting insights from the massive amounts of data they have trapped in silos. The use of powerful tools like artificial intelligence and machine learning can analyze the data and make personalized recommendations in real-time.
- » **Scaling across new and emerging channels and new media:** Being prepared to use new media and channels will help you gain a competitive advantage as technology changes how business is conducted.
- » **Acting on insights to optimize results:** Many companies not only find it challenging to bring siloed data together to create a unified customer profile, they also find it hard to act on the insights they have. Software that permits testing and making changes in real-time by surfacing winning experiences helps companies take the actions they want without IT intervention.
- » **Respecting privacy boundaries:** Brands can find it hard to walk the fine line between receiving a personalized message and being "creepy." Think about not only what message you send, but how you phrase it. Make customers feel secure in the knowledge that there are boundaries you won't cross.

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Deliver personalized experiences at scale

Brands are fighting to capture attention and meet customer expectations even as they navigate uncertain times. To succeed in this challenging environment, brands need to make recommendations that encourage upsells and cross-sells and help encourage long-term loyalty. Personalized experiences are no longer optional. This book is your guide to building a digital foundation that will deliver personalized experiences at scale.

Inside...

- Understand why personalization matters
- Work from a unified digital platform
- Deliver contextual experiences
- Deploy content across channels
- Track data and measure success
- Gain insights through artificial intelligence and machine learning



Stephanie Diamond founded Digital Media Works, Inc., an online marketing company. She is the author of *Digital Marketing All-In-One For Dummies* and many other For Dummies books.

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