

6 Crucial Technologies for Successful Personalization at Scale

It's already challenging enough for businesses to be able to stand out and differentiate themselves amidst cut-throat competition and rising customer expectations. Companies are setting the bar higher by engaging with their customers on more personal levels by targeting them with content that is more personalized and relevant. However, that alone is also not sufficient to satisfy customers anymore.

Powerfully meet your customers' changing expectations with personalization at scale.

What is Personalization at Scale?

Let's unpack this term into two parts: "personalization" and "at scale".

Personalization refers to the tailoring of messages or offers to individuals based on their actual behavior. Businesses are expected to not only create content but also deliver content to individuals that they would want to see, based on their actions and preferences. The second part of the phrase, "at scale", means delivering these personalized experiences to multiple audiences, across devices, while still being relevant to individual customers.

Organizations should not only be able to execute and connect fine-grained personalized experiences across multiple touchpoints such as websites, mobile devices, email, IoT and physical stores, to name a few, but also deliver tailored experiences to more people.

Why is it Important?

The average customer will encounter 15 to 20 brand touchpoints before that brand or product becomes relevant in his or her mind. This number is higher than it has been in recent years; in 2013, customers would only interact with four to six touchpoints before submitting an inquiry and we can only expect this number to rise in coming years due to IoT and other new emerging channels.¹ Ensuring customers have a seamless, cohesive and personalized experience throughout all of these touchpoints is critical to not only obtaining new customers but also building a long-term relationship with them.

¹ How Many Brand Touchpoints Do You Need with an Audience Before They Purchase

Scaling personalization can also:²



Not only that, customers are demanding more throughout every stage of their unique lifecycles. They expect relevancy in both services and products. Not only are you required to pay attention to customers' activities but you also need to actively provide what they want and need. In fact, according to a study by Accenture,⁵ 91% of consumers are more likely to shop with brands who recognize, remember and provide offers and recommendations that are relevant to them. At the same time, 74% of customers feel frustrated if there is a lack of personalization.⁶ If consumers don't receive the kind of experiences they want, they'll go elsewhere.

² Marketing's Holy Grail: Digital Personalization at Scale

³ 12 Stats that Prove Why Personalisation is so Important

⁴ The Content Marketing Personalization Imperative

⁵ Making it Personal

⁶ 10 Surprising Stats About Personalization



Organizations should never lose sight of the purpose behind personalization, which is to foster the relationship with the customer. Personalization should demonstrate that the customer is recognized, respected and understood while delivering a seamless, efficient and pleasant experience.

Gartner, Nine Best Practices for Privacy and Personalization in Digital Business
Customer Experiences, Penny Gillespie and Frank Buytendijk,
Refreshed 18 February 2019, Published 19 July 2017

Making it Personal

Basic personalization features, such as calling out a customer's first name, fail to engage with customers in any relevant way anymore. In a survey, only 8% of respondents⁷ answered that they would be encouraged to engage with a retail brand if they sent an email that included their first name or sent a birthday email. Organizations are moving to next-level personalization to effectively engage customers; one example would be utilizing data to curate personalized offers.

In a piece detailed in the Harvard Business Review, a solar company offered a seamless, personalized customer journey so compelling that many never even considered competitors; one of the writers of this article, experienced this firsthand.⁸ The process began when he received a mail with the message "Open this to find out how much the Edeleman family can save on energy costs with solar panels" that contained a unique URL with a Google Earth image of his house with solar panels superimposed onto the roof. The page detailed custom calculations of energy savings based on the family's energy use, roof angle, presence of nearby trees and energy-generation potential based on the number of panels the company expected the roof to hold. After accessing this information, he was connected to

⁷ 12 Stats that Prove Why Personalisation is so Important

⁸ Competing on Customer Journeys

a live sales rep that was looking at the same pages he was. After answering his questions and sending videos, the company emailed him with names and numbers of nearby homeowners who served as references. After checking these references, he returned back to the site where he was connected with a rep that knew exactly where he was on the journey and had a tailored lease ready for him to sign. Once he signed, the website then changed to track the progress of permitting and installation, with alerts sent out once progress was made. This solar company made it so simple and compelling for each customer to move from one touchpoint to another, why would anyone consider another option?

A strategy like this is very effective but successful execution on this scale is very difficult. Why? Simply because, personalization itself can already be a challenge. Needing to expand that across multiple channels and multiple audiences at the same time is even more daunting. In order to achieve success, you'll need to find and implement technology that empowers your business to personalize your information with thousands, or even millions, of customers.

Six Features Necessary for Personalization at Scale

A recent study of 50 companies' personalization efforts found only about 15% of companies can be considered true personalization leaders and 65% are still using segmented marketing or even mass-market approaches.⁹ True success in personalization requires interdepartmental collaboration, teams dedicated to personalization, clear goals and roadmap, and the right technology. While specific features from solution to solution may vary depending on what your organization may need, here are six technologies that are absolutely critical to ensure successful personalization at scale:

⁹ Profiting from Personalization

1. Data Collection and Analysis

Personalization at scale efforts often fail because organizations will have a lot of data but are unaware of how to harmonize and transform that data into actionable insights. According to an IDC study, consumers created 1.8 zettabytes of information in 2011, which will multiply approximately 50 times by the year 2020 and only continue to grow exponentially.¹⁰

Data is critical because to effectively personalize, marketers need to have a solid understanding of their customers. You have to know your individual customer's needs, what they're looking for, remember what they've done and even anticipate their future needs. Take time to truly understand the different customers to whom you are trying to personalize.

Powerful personalization requires technologies that can transform data into a single source of customer truth. Connecting and combining the data in all systems and channels helps create a progressively richer Single Customer View.¹¹ When you add new systems to your infrastructure or purchase a new data source, make sure they can connect to the existing data hub in order to add and access the consumer information from the same single source of truth. Such agility and flexibility are essential for today's dynamic business environment. In addition, support these efforts with AI, ML and automation capabilities to further help collect and leverage data. From there, a powerful analytics tool will help guide scaling your personalization initiatives to the right channels and audiences. Better data will lead to better insights and more powerful personalization.

However, organizations need to be careful not to cross the line and come off as “creepy” towards customers. In a study completed by InMoment, 75% of consumers surveyed found the personalization they experienced to be creepy. While half wouldn't change their behavior, around 20% of respondents answered that they would look for another brand.¹² According to the study, “Customers

¹⁰ Single Customer View Demystified

¹¹ Single Customer View Demystified

¹² Digital Privacy: Brands Figuring Out Where Personalization Gets Creepy

want to feel like they are gaining special treatment when it comes to offers and rewards but are not so happy when those awards are offered as a result of their own personal data used by the brand.”¹³

2. Privacy and Protection of Data

While data is the lifeblood that powers any business, there are increasing limitations on data, particularly in regards to privacy. While 83% of consumers are willing to give their data in order to receive personalized offers and benefits,¹⁴ organizations still need to be extremely cautious when it comes to collecting data and then utilizing that data to target users, especially with privacy laws such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) in place. This is a small price to pay to build consumer trust and the political and legal ramifications for companies that fail to comply will likely be severe. Find tools that can not only help protect and manage data in ways that comply with these established privacy laws but are also flexible enough to accommodate for changes in the future.

Additionally, businesses should also establish a strong internal privacy policy on customer data that is well-designed and implemented to convey that they are being a good steward of customer data. A good policy should include the following:¹⁵

- Purpose, use and retention policies for customer data.
- Options for consent and transparency for how to change them.
- Guidelines for sharing data with third parties and separate consent for sharing that data.
- Transparent and clear language so that all customers can easily understand.

¹³ Digital Privacy: Brands Figuring Out Where Personalization Gets Creepy

¹⁴ Making it Personal

¹⁵ Nine Best Practices for Privacy and Personalization in Digital Business Customer Experiences

3. Content and Digital Asset Management

Personalizing experiences for a mass audience will necessitate the creation of large amounts of content and assets. Look for a solution that will allow you to manage and publish assets on a central system to enable your employees and customers to easily collaborate but also reduce the amount of time searching for these assets.

A digital asset management (DAM) system has been declared by Forrester¹⁶ as the heart of enterprise marketing. “The power of the DAM is integrating with delivery channels so that you can have large volumes of content, in effect a scalable library, that you can deliver to email, or WCM or PIM, or CXM, or even videos to social channels,” said Nick Barber, co-author of the same Forrester report. Powerful DAM systems give enterprises a place to organize, distribute and track creative content with supporting workflow capabilities. The ability to manage content from a single location makes it possible to deliver a consistent content strategy across all your programs and customer touch points.

From there, create, edit and publish content on a solution that takes advantage of reusable content templates and structures. These will enable business users to quickly build landing pages and sites, with no development required, while maintaining a common look and feel across an entire site. Powerful solutions will also allow for built-in workflow, article versioning, search and metadata.

4. Powerful Segmentation Rules

It’s not enough just to be able to store, create and display content but organizations need ways to target and deliver it. Accomplish this with granular segmentation rules to distribute specific content for different audiences, across various channels. Find tools that empower your business to target users according to their location, previously visited content, cookies, etc. Organizations should be able to not only personalize web pages but also tailor individual images or messaging on these pages for even greater personalization.

¹⁶ DAM Moves to the Heart of Enterprise in Forrester Vendor Landscape

5. Omnichannel Capabilities

The need for omnichannel marketing is evident. According to Google,¹⁷ about 85% of online shoppers start a purchase on one device but will finish on another. But it's not simply enough to be present on multiple channels, rather enterprises need to ensure that messaging and experiences are seamless from platform to platform, creating a personalized customer journey in context of time and place for individual users.

If executed successfully, omnichannel marketing can:¹⁸

- Retain 89% of customers with strong omnichannel engagement strategies in comparison to only 33% with weak strategies.
- Achieve customer satisfaction rates of up to 23 times higher.
- Generate 14.6% year-over-year increase in annual income.¹⁹

Yet marketers struggle to seamlessly connect their various touchpoints throughout the customer journey. In fact, only about 7% can manage fully integrated tailored communications across all channels.²⁰

Advanced solutions will have headless capabilities that can aid in executing omnichannel marketing. When developers are enabled to manage web content headlessly, they have the freedom to create any presentation layer they want. This allows developers to easily deliver richer, faster and more responsive user experiences, no matter the device, to enable omnichannel experiences from a single source of data.

Depend on a solution that can leverage headless functionalities to build different experiences, for new channels, and connect them to the data collected to be able to deliver engaging experiences to customers across their entire journey.

¹⁷ Top 2018 eCommerce Trends to Watch For

¹⁸ 34 Essential Omni-Channel Marketing Stats You Need to Know

¹⁹ 26 Statistics on Why You Should Consider Omnichannel Marketing

²⁰ Profiting from Personalization

6. Integration with Existing Systems

Due to the complexity of scaling personalization, organizations may need to invest in several different solutions, establish agile processes or even bring on new team members to help achieve success. Ensure that these tools and systems you are bringing in will work well together to form a seamless technology stack. In addition, your new solutions should be able to integrate with the existing technologies you use and even extend them further. This ensures that data and system silos are taken down to help streamline your business and make your personalization at scale efforts run more smoothly.

Knowing Your Customers

While technology and analytics are crucial to scaling personalization, companies won't achieve successful results without a clear strategy that is focused first and foremost on the customer. When executed alongside powerful technology, your business will be able to reap the benefits of personalization at scale and make the investment worth it.

Moving Forward

Learn how all of these six features are embedded into the latest version of Liferay DXP and how you can leverage these functionalities, and more, for your business in [our features overview](#).



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