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Four things you need for personalization at scale.

[Body]

Personalization — the key to experience.

Customer expectations have reached an all-time high. Today, consumers have set staggeringly high standards and possess an “on-demand” mindset. This is largely due to leaps in technology, digital natives and other disruptors transforming the experience, and a fierce competitive landscape that continually redefines the new normal. These customers now expect to be understood completely, served intuitively based on their current context, and satisfied immediately with exactly what they want, where and when they want it. On top of all of that, it all has to feel secure, never creepy, and completely effortless.

When it comes to meeting customers’ ever-rising expectations on experience, arguably nothing is more important than personalization. CMO.com recently reported that 67 percent of survey respondents said it’s important for brands to automatically adjust content based on their current context.

In a Segment study, 44 percent of consumers said they will likely become repeat buyers after a personalized shopping experience with a particular company, and 49 percent say they have purchased a product that they did not initially intend to buy after receiving a personalized recommendation from a brand. What’s more, 40 percent of consumers say they have purchased something more expensive than they originally planned because their experience was personalized.

On the flip side, not delivering on personalization can be costly. CMO.com also reports that 42 percent of customers said they get annoyed when their content isn’t personalized. Meanwhile, research from Bazaarvoice, reported by eMarketer, showed that 38 percent of U.S. digital shoppers would stop shopping at a retailer that made poor product recommendations, while Infosys reports that nearly one-third of consumers wish their shopping experience were more personalized than it currently is.

With its importance to customers, it’s no surprise that personalization has a big impact on business results. Econsultancy found that 93 percent of companies see an uplift in conversion rates from personalization.

However, despite the potential for huge business gains, few companies can currently deliver a fully personalized experience. According to Segment, only 22 percent of shoppers are satisfied with the level of personalization they currently receive, meaning a larger number of brands are failing to create experiences that actually inspire consumers to make a purchase. So it’s not surprising that in a recent survey by CMO Council, reported by eMarketer, only 5 percent of senior marketers said they could deliver data-driven experiences in real time across channels. In another study conducted by Verdale and reported by eMarketer, 91 percent of senior decision makers acknowledged that their company needs to improve upon its personalization capabilities. And more than half said their organization “often fails to deliver the personalization customers crave.”

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In addition, 53% of companies reported that personalization tactics resulted in increases above 10% on primary KPIs such as conversion rate, lead generation, and revenue. ¶

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What leading omnichannel personalization looks like.

First, it's important to understand what leading personalization looks like. Using Adobe's maturity model outlining business capabilities needed to enable personalization at scale, we assessed the retail landscape. Our study found that no retailer is currently deploying advanced or cutting-edge personalization tactics across the entire omnichannel customer journey. It's no wonder customers aren't satisfied with the level of personalization they're experiencing.

Many companies have at least some personalization on their digital properties today—usually basic tactics such as product recommendations at the site's checkout page to encourage last-minute cart additions, or email or display promotions sent for items a customer has recently browsed but not purchased.

However, few brands are consistently deploying advanced personalization tactics across channels—and arguably none are achieving cutting-edge status across all aspects of personalization. In the business-to-consumer (B2C) space, the following personalization tactics can be considered advanced or cutting-edge today:

- **Digital Tactics,**

- Home pages with dynamic hero banners, tailored promotional offers, or content blocks that are prioritized or sequenced differently by customer
- Category pages that dynamically sort products or offerings based on customers' preferences across dimensions such as styles, locations, or service category
- Experiences that adapt in real time to the current context of the customer, based on in-session browse behaviors even for unauthenticated site visitors
- Relevant emails where more than 75 percent of the content is personalized using dynamic content assembly
- Behavior-triggered push/SMS notifications—for example, in-store offers, alerts in travel, notifications based on financial action

- **Offline Tactics,**

- Tailored point-of-sale coupons generated on receipts
- Clienteling, where store associates or call centers can access customers' preferences, wish lists, or historical browse and purchase behavior to provide personalized customer services
- Concierge or personal shopping services

There are a handful of well-known names currently achieving advanced and occasionally cutting-edge personalization. Amazon is cited in nearly any discussion about personalization. Their e-commerce tactics are well-known and long seen as pioneering, and they've expanded and connected that personalization across channels. Netflix is another long-time role model in this world, particularly their highly sophisticated recommendation engine.

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But a few forward-thinking brands beyond these behemoths are breaking new ground in personalization. Nordstrom, for example, has been innovative in using gamified quizzes to get explicit customer input on brand, ~~or~~ designer preferences, which they then use to create personalized digital experiences to tailor and streamline the shopping experience. Based on the customer's designer "likes," they dynamically sort category pages to prioritize preferred brands at the top—removing the need to click through multiple pages of content to find the perfect outfit. They're also achieving personalization across channels, such as delivering seamless connections between personalized emails and web landing experiences.

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[Callout real-life example]

High-flying personalization beyond booking.

Scandinavian Airlines, better known as SAS, is laser-focused on frequent flyers who consider travel a way to live life fully. "SAS is no longer just an airline company," says Didrik Fjeldstad, ~~vice~~ ~~president of~~ marketing with SAS. "We are a lifestyle brand that connects to travelers on an emotional level."

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Key to fulfilling this brand promise is personalization across every touchpoint—everything from booking flights to airport lounge visits, in-plane experiences to a wide range of travel-related offerings packaged up dynamically for each individual. This level of personalized experience isn't easy but it's worth it. The primary segment they're targeting now accounts for ~~70 percent~~ of their revenue, and they've increased revenue from that segment by ~~26 percent~~.

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Four capabilities for best-in-class personalization.

The vision of fully scaled personalized customer experiences is compelling, but the looming challenge for many organizations is figuring out how to make it real. Based on our research, best-in-class personalization at scale requires enabling business capabilities across four key dimensions:

1. Data and analytics
2. Creative and content management
3. Optimization and decisioning
4. Organization and operating model

1. DATA AND ANALYTICS

Personalization is only as effective as the underlying data driving it. Robust personalization requires companies to deeply understand their customers—their needs and wants, psychographics and attitudes, shopping preferences, past purchases and behaviors, as well as the context in which they are interacting with the brand in the moment.

Even more important than capturing all this data is integrating it, connecting it to a customer profile, and making it available in real time. That's why a 360-degree view of customer data is so critical to

personalization at scale. Any data collected across channels and parties should be used to create a more holistic picture of the customer.

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But for the brands setting the personalization standard, a complete picture isn't enough. They know they must turn massive and potentially unwieldy data into dynamic, highly-relevant experiences. That's why they use predictive models that allow them to target and deliver one-to-one content and experiences. And they rely on technology—especially artificial intelligence and machine learning—to support advanced decisioning capabilities to drive their targeting.

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These best-in-class companies also use machine-learning algorithms and models to predict a customer's propensity to purchase a particular product category, service, brand, or style during a particular campaign or event. In addition, these algorithms and models can predict a customer's price sensitivity, churn risk, engagement, and preferred contact frequency. All of this means the campaign analyst no longer needs to rely on gut to figure out how best to target customers, but instead can turn to predictive models and data science to effectively segment and target known customers at scale.

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Get to know your data.

Data comes in many flavors and from many sources, but it can all be bucketed into three primary types—first party, second party, and third party.

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First-party data. This is data you own. Some first-party data is explicit, meaning that it's expressly stated by the customer. An example is a department store retailer using a gamified style quiz to capture customers' designer and brand preferences. Implicit first-party data, on the other hand, is derived from customers' actual behaviors (e.g., purchases, browsing) with your brand across omnichannel touchpoints.

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Second-party data. In short, this is someone else's first-party data, and it comes from partners of various types. For example, a consumer packaged goods company may get sales and customer data from its retailer, or distributor or vice-versa. Publishers are another common source for second-party data.

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Third-party data. This is data you can buy. For example, you might use purchased data around recent home buyers so you can market furniture to them. Third-party data can provide addressable segments and augment customer understanding across many dimensions—current life circumstances, home ownership, education, and income level, to name a few.

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[Basic data explanation sidebar]

[Callout real-life example]

Opening up Pandora's possibilities.

Organizations of all kinds, across all industries, are developing innovative personalization tailored to their unique environment and needs—based on the explicit and implicit data they have. For the

music service Pandora, it's about extending the music magic that happens inside their platform and pushing it out via all other channels. "We use the power of our personal recommendations for that next artist or that next song and actually talk to you about it in an email campaign, a push notification, or other off-platform marketing," says Chris Phillips, chief product officer at Pandora.

To personalize experiences across channels, Pandora is capitalizing on the tens of billions of data points they use to personalize their music. This specific kind of music- and data-powered customer empathy might be unique to Pandora, but it illustrates how marketers of all types can dial in their personalization efforts by unifying disparate customer data.

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2. CREATIVE AND CONTENT MANAGEMENT

One of the biggest hurdles to achieving personalization at scale is producing the huge amounts of content needed to deliver personalized experiences. A one-to-one homepage or email experience, for example, requires potentially hundreds or even thousands of versions, in order to be tailored and relevant at the individual level. Creative teams already face pressure around content creation. According to the Adobe 2017 State of Creativity in Business survey, 65 percent of creatives have seen an increase in content creation demands over the past five years. And that's largely without the crush of personalization at scale.

To achieve personalization at scale, creative teams should evolve from traditional approaches and instead use technology to automatically and dynamically assemble content. This requires two major shifts in the way they work:

1. Creative teams should manage content production workflows to produce individual "content blocks" instead of producing the complete homepage or email as they've always done. With this dramatic but critical shift, content would be created once and then applied or modified for all touchpoints through dynamic content assembly.
2. To make automatic content assembly possible, content blocks must be attributed with the right metadata. As an example, a content block that contains a travel company's "Resorts. Save up to 20% off" message would be attributed with metadata such as *promo offer*, *leisure travel*, *beach*, *golf*, and *pool*, to name a few. Increasingly, AI is the most effective method for tagging, since it can be trained to automatically recognize and tag large numbers of content blocks and other assets with the appropriate attributes.

[Short explanatory sidebar]

What is a content block?

Personalized experiences are often a collection of multiple unique messages, each contained in what we call a content block. A content block contains the message headline, image, copy, and call to action. It can be reused across multiple touchpoints and across time. For example, the content blocks used in the Katie and Oliva homepage comparison, below could also be placed in personalized emails.

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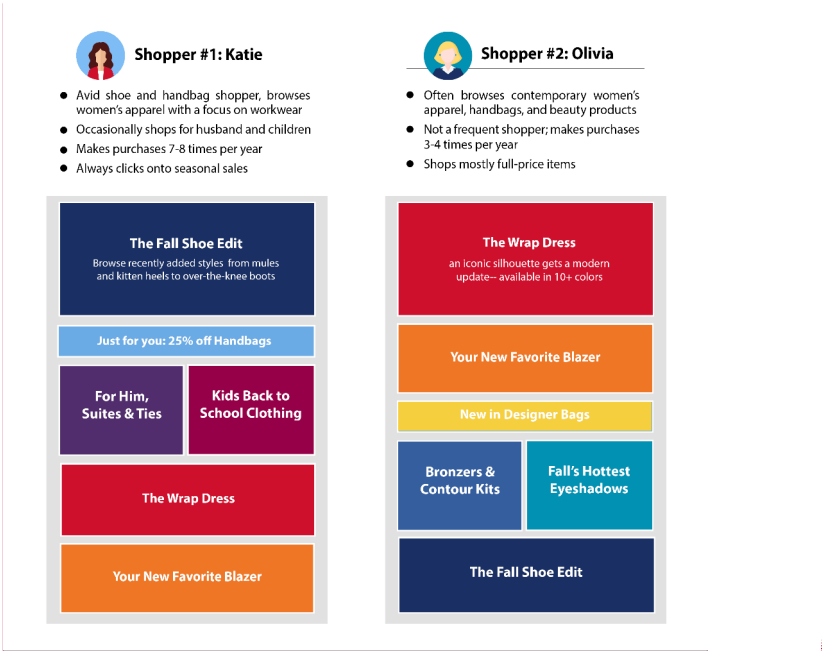
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A tale of two experiences.

Two customers, Katie and Olivia, get unique homepage experiences with tailored content layout and dynamic offers based on who they are. Each homepage has multiple unique messages contained in content blocks reused across customers and channels—but prioritized or sequenced differently based on the customer. Offers are also tailored based on the customer's price sensitivity or potential lifetime value.



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How Philips creates over a million pages of content.

Philips, one of the world's most respected technology and manufacturing companies, had big goals. They wanted to empower their more than 500 content authors and standardize how dynamic, personalized content was created, delivered, and localized to promote their products and brand.

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One way they tackled this massive creation challenge was through prebuilt page elements using Adobe Experience Manager. “[Adobe Experience Manager] helps us prebuild page elements so sites have consistency and content can be reused across several pages,” says Joost van Dun, senior manager of the .com experience at Philips. According to van Dun, these prebuilt page elements are “a smart solution that enables us to deliver new information and experiences faster, as well as helps ensure that every page a customer visits stays true to the Philips brand. It’s like building blocks for adults.”

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3. OPTIMIZATION AND DECISIONING

Advanced capabilities are needed to realize one-to-one experiences. Without those advanced capabilities, personalization efforts will fall short—for both the customer and the bottom line.

Companies must evolve from managing siloed, channel-specific communications to orchestrating omnichannel campaigns across all traditional and new media. This is critical to ensuring a seamless, consistent message to customers across the multiple touchpoints in their journey, which could start on the site and end with viewing an app in a store. Being able to orchestrate these messages will improve response and engagement—and then lead to the ultimate sale.

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A key technology for personalization at scale is a centralized decisioning engine, powered by predictive models and algorithms. An effective decisioning engine can automatically arbitrate which messages, offers, and experiences should be presented to which individual customers and over which channels, based on their likelihood to respond. Furthermore, it can establish the most effective contact frequency and recency for maximum effectiveness—enough for awareness and engagement, but not so much it causes churn or fatigue.

You can think of a centralized decisioning engine as providing the “personalization recipe” that identifies which messages or content blocks each microsegment or customer should receive over which channels. The content can then be automatically assembled according to this recipe, with the right assets pulled into the right placements, (e.g., a second placement on the homepage), across digital channels.

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Of course, other technology capabilities are also required to achieve higher levels of personalization. For example, digital asset management and content management systems are foundational to personalization at scale—and they must be deployed, integrated, and used across the organization.

4. ORGANIZATION AND OPERATING MODEL

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Transformation required.

Achieving personalization at scale takes more than new technologies. It requires transformation. First, the organization and operating model should be structured in support of seamless personalized experience across channels. And that requires moving beyond a traditional organizational structure, with its separate online and offline teams operating under separate profits and losses. To successfully execute

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personalization at scale, transformation must happen at every level. Digital and print teams should be consolidated at both the leadership and staff levels, so that the organization can set their omnichannel strategy and effectively execute upon it. In order to drive omnichannel sales and margin, organizational incentives should also be shared and aligned.

Change in quality, not quantity.

Implementing personalization across channels can be a huge undertaking, but one thing to note is that it shouldn't require significant additional headcount. What it does require is a small, dedicated cross-functional team of business and tech executives who own the transformation program—a governance or center of excellence team. This team is responsible for defining the strategy, prioritizing use cases or capabilities, and developing the business case and roadmap to steer implementation. And since personalization isn't just about plugging in technology, this team would also be responsible for redesigning business processes and identifying organizational changes as necessary to realize omnichannel personalization at scale. It will likely require more advanced skillsets from some of the frontline teams—data fluency, ability to efficiently operate advanced capabilities such as decisioning tools, and openness to change, to name a few.

Also critical is having top-down C-level support. This will ensure the personalization strategy aligns with enterprise business goals. It will also be needed as personalization may be a multi-year journey to enable capabilities across channels. Continued sponsorship will be critical to champion change and transformation across the organization and to secure capital funding.

[Closing]

Now's the time to step up your personalization game.

For those willing to build out the necessary capabilities within their organization, personalization presents a wealth of opportunity. It can impact day-to-day results, with tactical returns such as campaign performance. More importantly, it can be central to achieving overarching business strategy priorities. Because personalization at scale seems daunting, it's easy to become discouraged by a lack of resources or support around it. But the good news is that successful programs often start small, garnering the sponsorship of a high-level executive and generating top-line impact quickly, before scaling across the whole organization.

As advancements in marketing technology accelerates, the bar for personalization tactics rises as well. Customers are already asking for more personalized experiences today, and companies at the front of the pack anticipate and rise to meet those expectations. Executed properly, personalized marketing strengthens brand loyalty, customer engagement and retention, and a host of other key performance indicators. Companies with advanced personalization capabilities are unlocking competitive advantage for years to come, delivering value within months but also in the long term.

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How to get started.

Here are the seven basic steps to achieving personalization at scale, boiled down to their essence.

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- 1.a Establish program org structure with c-level support
- 1.b Develop personalization strategy, prioritize desired capabilities & build business case
- 2 Implement quick wins to deliver value immediately
- 3 Identify solutions/platform and define required tech architecture
- 4 Define roadmap, prioritize projects based on value & implementation complexity
- 5 Prepare data platform to provide a single omnichannel view of customer
- 6 Redesign business processes & identify org structure and resource requirements
- 7 Measure & monitor results and omnichannel KPIs

[Callout]

Discover how far along your organization is on the personalization journey.

The Adobe Digital Strategy group has created a detailed maturity model that can help evaluate your organization's current personalization capabilities. It also details what's needed to become best in class, so you can envision and prioritize future capabilities. Contact us to find out more.

[/Callout]

[Appendix for industry-specific descriptions]

APPENDIX

Personalization at scale by industry.

Although much about personalization is similar across almost all enterprises, each industry has a unique set of requirements. Their audiences vary, for example, as do the expectations from those audiences. Some industries are driven by immediate sales, others by long-term loyalty. Some have regulatory pressures, others must factor in physical in-person interactions. The variations are many and often have substantial impact on how personalization is done.

With that in mind, let's look at some of the industry-specific requirements around personalization at scale. It isn't a catch-all and it doesn't get granular. But at a minimum, it introduces ways to consider personalization in an industry context.

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2 Implement quick wins to deliver value immediately.

3 Identify solutions or platform and define required tech architecture to achieve those solutions.

4 Define roadmap and prioritize projects based on value and implementation complexity.

5 Prepare your data platform to provide a single omnichannel view of your customer.

6 Redesign business processes and identify org structure and resource requirements.

7 Measure and monitor results and omnichannel KPIs.

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Relevant industry dynamics.

Although the retail industry is facing massive change, it has mostly been stagnant in sales growth, hovering around 3 percent a year. Many large retailers have lost substantial market share, often as a result of ecommerce and digitally native retail brands more adept at delivering outstanding, personalized experiences across channels. The “Amazon Effect” is in full force in retail.

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Audience demands.

Retail customers are increasingly less brand loyal but also expect far more from retailers, especially from digital experiences. Retailers must live up to the high bar established in the customer’s daily experiences online—predictive recommendations on Amazon, personally tailored search results on Google, and curated social channels, for example. The bar for physical locations is also being set higher, as are expectations for fluid, connected experiences between physical and digital channels.

Key opportunities.

Martech capabilities have exploded in recent years, and they will continue to expand rapidly, including much greater ability to effectively execute and automate personalization at scale in retail environments, either online or in-store. Other capabilities relevant to personalization at scale in retail include the ability to identify audiences and adapt experiences based on behavior, to reduce friction across channels, and to provide AI-enabled, data-driven next-best-purchase recommendations.

Example of success.

From their website to their app to their in-store experience, Sephora is delivering personalization. On their website, they leverage a mix of implicit and explicit behavioral data to deliver specifics—by skincare category, dry or oily skin, for example. Another example is their mobile app’s “store companion mode,” which uses geotargeting and past shopper behavior to dynamically deliver a highly contextually-relevant, personalized experience.

Return on CX investment in retail.

Retailers who meet Forrester’s requirements for being an “experience-driven business” substantially outperform all other retailers across numerous key indicators. Here are some examples:

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- 1.8x in brand equity
- 1.4x in customer retention
- 1.9x in bottom-line profitability

TRAVEL & HOSPITALITY

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Relevant industry dynamics.

Travel and hospitality has long been a volatile sector, and that’s only accelerated in recent years. Travel brands find themselves challenged by disruptive technology and approaches—Airbnb, Uber, and Google being highly visible but not isolated examples. In addition, travel was an experience industry long before experience became a buzzword, and nearly all travel brands face pressure to use digital as a way to enhance customer experiences, hence the urgency to achieve personalization at scale. However, travel and hospitality includes many subsectors, each with unique requirements around experience and personalization.

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Audience demands.

Customers, particularly those in younger demographics, are increasingly expecting, as a baseline, travel and hospitality experiences that just a few years ago would have impressed them. They also expect these experiences to happen in real time—even a few seconds of delay can mean the difference between satisfaction and disappointment. At the same time, customers are looking for travel brands to address them across every step of their often literal journey, from initial inspiration to in-trip to long-term loyalty programs.

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Key opportunities.

Despite personalization's importance in travel, brands are skeptical about their success. With only 15 percent of digital leaders in the industry saying they deliver highly personalized digital experiences to their customers, travel brands can still differentiate through personalization at scale. Also, although data in this industry often sits in disparate databases, data management platforms are overcoming this hurdle—which in turn gives travel brands greater ability to leverage data for personalization.

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Example of success.

Delta sent hundreds of thousands of personalized videos to its Medallion loyalty members, with one-to-one content based on customer data points, which generated a clickthrough rate 500 percent above benchmark. Marriott's loyalty-oriented mobile app streamlines guest experiences, with everything from digital keys to personalized recommendations for nearby activities that align to the customer's preferences.

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Return on CX investment in travel and hospitality.

Travel brands who meet Forrester's requirements for being an "experience-driven business" substantially outperform other brands in the industry across numerous key indicators. Here are some examples:

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- **1.7x** in customer loyalty
- **1.9x** in customer experience
- **2x** in revenue growth rate

MEDIA & ENTERTAINMENT

Relevant industry dynamics.

For many years, media and entertainment companies have faced upheaval, with everything from video on demand to social media driving massive change within the industry. Monetization has also been an ongoing challenge, and many organizations in this space still are trying to overcome the move away from traditional advertising revenue.

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Audience demands.

Media and entertainment audiences are about immediate gratification. They've grown accustomed to a YouTube-like experience, where there's nearly infinite content all just a search away. At the same time, they also have come to expect curated experiences with highly relevant recommendations like those provided by Netflix.

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Key opportunities.

Media and entertainment companies that invest in intuitive, personalized, and integrated content experiences can acquire, engage, and create a loyal customer base. Furthermore, they can use content consumption data to learn which content resonates, even to an individual level—and then deliver the most relevant content across all channels.

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Example of success.

Sky UK has customers that are omnichannel in nature, with 71 percent using more than three channels to interact with their brand. They've been successful at creating omnichannel experiences to meet that reality. For example, they can use sports television viewing habits to get to individual team preferences, and from there serve up scores and other timely data via apps and mobile alerts.

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Return on CX investment in media and entertainment.

Media and entertainment companies who meet Forrester's requirements for **being an** "experience-driven business" substantially outperform all others across numerous key indicators. Here are some examples:

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- 3x in repeat visitor rates
- 1.5x in exceeding customer experience expectations
- 1.3x in customer lifetime value

FINANCIAL SERVICES

Relevant industry dynamics.

Financial firms used to expect loyalty, since consumers switching difficult and confusing. However, that has changed in recent times—especially with new, digitally savvy entrants putting pressure on incumbents and making them raise their game.

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Audience demands.

Digital financial tools have become increasingly sophisticated, and consumers now expect those tools to be highly mobile, simple to use, meaningful, and highly personalized. And they expect that personalization across all touchpoints.

Key opportunities.

Financial services recognize the importance of targeting and personalization. More than a third of respondents in a 2018 survey from Econsultancy described it as a top-three priority for 2018, substantially higher than respondents across all sectors.

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Return on CX investment in financial services.

Those organizations in financial services who meet Forrester's requirements for **being an** "experience-driven business" substantially outperform all others across numerous key indicators. Here are some examples:

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- 2.5x in new visitors to websites
- 1.3x in revenue growth
- 1.5x in bottom-line profitability

Resources

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