

salesforce

Customizing for Every Customer

How 1-to-1 Personalization Drives ROI



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Meet Astro.

Your Guide for Salesforce

Astro and friends love showing Trailblazers like you around Salesforce and its many business solutions. Follow along as they guide you through the tips and resources in the pages ahead.

What Is 1-to-1 Personalization?

Personalization has moved beyond segmentation – it's now a proven strategy to transform customer relationships, drive business growth, and increase overall marketing ROI.

Just because people live in the same city, work in the same industry, or are the same age or gender, it doesn't mean they read, buy, or want the same things.

Brand interactions should reflect each person's individuality. But for a long time, that was a far-fetched goal.

In recent years, though, personalization – the practice of tailoring experiences based on knowledge learned about an individual – has evolved dramatically, from targeting segments with uniform experiences (often ill-fitting for many) to truly resonating at the per-person level.

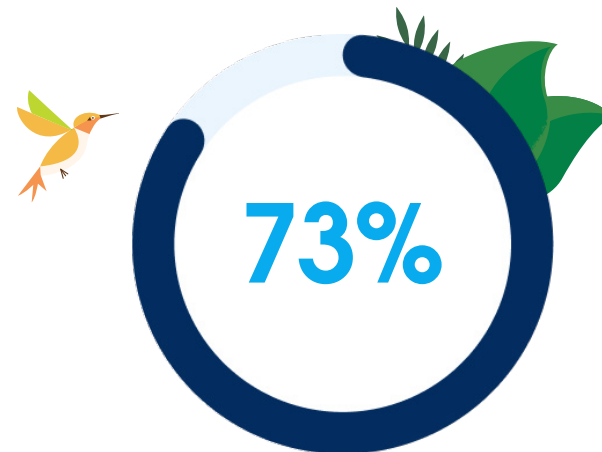
1-to-1 personalization leverages artificial intelligence (AI) to present individuals with the content, offers, and experiences that are uniquely relevant for them – wherever, whenever, and however they're interacting with your company.

Customers expect this type of treatment. According to the Salesforce "State of the Connected Customer" report (fifth edition), 73% of customers expect companies to understand their unique needs and expectations.

Companies also achieve great benefits from real-time personalization and interaction management, like:

- Improving customer experiences
- Increasing conversion rates
- Lowering acquisition costs
- Driving measurable lift in business results

In these pages, we'll explore why it's important to communicate with your audience members as the individuals they are – and how you can realize the dream of 1-to-1 personalization.



of customers expect better
personalization as technology advances.*

Planning for Personalization

At the heart of personalization is, of course, the person. So when formulating strategies and campaigns, it's important to remember that focal point. This sometimes requires a change in mindset – shifting from asking “What do we want to show each person?” to “What does each person want to see?” This customer-centric approach will help guide planning efforts and program execution, enabling you to capture insights and use them to deliver relevance with every customer interaction.

Some key planning components include:

Setting Goals

Before getting started, it's important to set clear objectives. These are often linked to overall business goals, as well as to the challenges and opportunities in each channel – such as your website, web app, mobile app, email, social media, digital ads, call center, live chat, and in-person.

You will probably have different goals, depending on your target audience and industry. Some of those goals might include:

- Increasing conversions
- Reducing customer acquisition costs
- Increasing repeat purchasing
- Driving content downloads, email signups, and offer redemptions
- Decreasing cart abandonment or bounce rates
- Lowering servicing costs
- Raising customer lifetime value
- Improving account-based marketing (ABM) initiatives

Also, consider how you'll measure progress. By knowing the key metrics that support your personalization goals – combined with the right technology solution that lets you measure the benefits – you'll be able to monitor and report on your success.

Assembling Your Team

The number of people involved in a personalization initiative often depends on the number of channels you support and the size of your company. At larger organizations, there are typically more people to include in questions and decisions related to goal setting, strategy development, campaign planning, team assignments, experience creation and approvals, and testing and optimization. Many have marketing, customer experience, and ecommerce roles. And companies also often involve designers, data analysts, developers, data scientists, and others.

Increasingly, many enterprise companies establish a **Personalization Management Office (PMO)** to be at the helm of their efforts. As with a traditional program management office, the PMO enables your organization to build and scale programs effectively, establish accountability, and secure buy-in.



Assessing Your Channels

Think about all the different ways customers interact with your brand – such as on your website or mobile app; through an email campaign; on social media; on-property at a kiosk, ATM, or point-of-sale (POS) system; or in a conversation with a sales or service representative. Any channel you use to communicate with customers and prospects should be personalized in some way. You might choose to start with personalization in select channels before moving on to others, thinking through your prioritization and approach.

Even if you opt to deploy personalization only in a limited number of channels, it's still important to collect data from your other touchpoints too – factoring that in to present the most relevant and timely experiences, and next best actions for each individual.

Identifying Your Data Sources

Data underpins your personalization strategy. Personalization based on good data – that's accurate, real-time, in-depth, modeled/analyzed, centralized, accessible, and actionable – yields relevant and helpful experiences. But when you feed incorrect, outdated, or incomplete data into your rules and algorithms, the outcome is poorly targeted and off-base communications, which isn't personalization at all.

Important zero and first-party data sources to tap for your campaigns include:

- **Behavioral data** – encompassing an individual's current and previous digital behaviors. In addition to opens, clicks, and page views, deeper behavioral indicators – such as active time spent and engagement (hovering, scrolling, zooming, interacting with reviews, and so on) – and transactions should be factored in too, for a more complete picture of each person's interests and intent.
- **Attribute data** – or data describing any characteristic of a person. Attributes can be accessed directly from the web (such as a person's geolocation, referring source, company, browser, and device type). They can also be pulled from connected databases, including CRMs, email and marketing automation platforms, and more.
- **Zero-party and first-party data** – such as responses to forms and survey questions, which can be used to supplement behavioral and attribute data.
- **Third-party data** – purchased from outside sources, and often including demographic and firmographic information.

Keep in mind that honesty is key when it comes to data sourcing – customers want to feel in control of their privacy. Simply put, be transparent. Always publish your policies about how you collect and use third party data.



Approaches to Personalization

Once you establish your goals, and identify your channels and data sources for personalization, it's time to select the approach you'll use. To deliver personalized experiences, you can use rules or machine-learning algorithms. They each have their place in a successful personalization strategy, and many marketers and digital professionals use a combination of the two.

Rule-Based Personalization

Rules are an important foundation for most personalization programs. Rule-based personalization enables marketers to deliver experiences to **segments** – or predefined groups of people – based on the manual creation and manipulation of business rules. Segments can be broad (such as all individuals from a specific region) or narrow (such as individuals from a target industry who have not yet downloaded a piece of content and have spent more than a minute viewing a particular category of content on your site). Marketers can set up rules to display experiences to these broad or narrow segments. Keep in mind: The more targeted, relevant, and granular you want to get with your experiences, the more rules you need to create and maintain.

Machine-Learning Personalization

Machine learning, a form of AI, uses algorithms and predictive analytics to determine and display the most relevant content, offers, recommendations, and complete experiences – in real time and in a highly scalable way. Machine-learning algorithms process vast quantities of data, detecting patterns in a manner – and at a speed – that humans can't. This form of AI is important to infuse into your marketing to help build lasting customer relationships.

With rule-based personalization, marketers must pick each experience they want to show each segment manually. But with machine learning, marketers can simply set up a single algorithm or an algorithmic “recipe” to automatically provide a unique, relevant experience for each individual.

Use Rules for:

- ✓ Geo-targeting
- ✓ Persona-based marketing
- ✓ Account-based marketing (ABM)
- ✓ Any segment-based communication

Use Machine Learning for:

- ✓ Product, content, and category recs
- ✓ Next best actions or offers
- ✓ 1-to-1 experiences and messages
- ✓ Continuous testing and optimization



The Growth of AI

As the technology becomes more accessible and its benefits are more widely known, the use of AI across marketing is skyrocketing. According to the most recent “State of Marketing” report, 75% of marketers are experimenting with or fully implementing AI.

For personalization, the use of AI – in particular, machine learning – is also **becoming more mainstream**, so that companies can deliver real-time, 1-to-1 experiences at scale. Certain machine-learning algorithms get smarter the more data they’re fed and can even automatically detect and respond to changes in individuals’ buying patterns and behaviors.

Additionally, many marketers are opting for a more transparent, human-guided approach to machine learning, where they have insight into and can fine-tune the algorithms that power their campaigns.



75% of marketers are experimenting with or fully implementing AI.*



89% of marketers say they must continually innovate to remain competitive.*



*Salesforce, “State of Marketing,” 9th Edition

Personalization Across Channels

Building a Personalization Experience Across Channels

Let's face it – adjusting your entire marketing approach around personalizing every customer interaction can feel daunting. But when approached in stages, it's not as overwhelming. The simplest method is to select an initial channel to optimize – like your website, email, or mobile app – then build out a complete personalized experience from there.

Starting with Web Personalization

Your brand's website functions as your digital storefront. For many organizations, it's the place where your customers most often interact with your brand. It's where new customers come to make quick decisions about doing business with you, and where your current customers go to decide on their next purchase or action. This is why website personalization is the natural place many companies begin their personalization journey.

Website personalization means making sure the page a returning customer sees is relevant to their last experience or recent purchase. It can also mean that the product recommendations a new customer sees are focused around their in-session browsing.

The return on this initial investment can be quick and powerful. Many companies that implement personalization on their website can see conversion rates jump as much as 50% or more.* This means that a site that was previously converting 2% of visitors could jump to 3%. For many digital marketers, that level of lift in site conversion is a dream come true. It also has tremendous impact across your marketing programs, helping you reduce your overall customer acquisition costs.

Connecting Web with Email Messaging

The next step toward personalization maturity is connecting a customer's web experience with their email experience. It's a critical leap across two major channels for customer engagement, and helps bring organizations closer to the dream of an omni-channel personalization experience.

When a customer leaves your website or makes a purchase, a well-timed and hyper-relevant follow-up message can deepen that relationship and increase lifetime value without a significant incremental investment in marketing spend.



* Source: 2022 Salesforce Success Metrics Global Highlights. A 2022 study based on 3,706 customer interviews in the US, Canada, UK, Germany, France, Australia, India, Singapore, Japan, and Brazil.

Omni-Channel Experiences

The final step is to extend personalization across every channel. This means wherever customers are interacting with your brand, they associate that touchpoint with you – including in-store, at a kiosk, or when speaking to a sales rep or service agent.

Customers expect to be able to pick up where they left off. In fact, according to the “State of the Connected Customer” report, 77% of customers expect to interact with someone immediately when they contact a company.



Bringing Your Data Together

To support and power personalization, you need to have real-time insights into each individual's up-to-the-minute behaviors and interactions. You also need to be able to activate all that data, right as the person is engaging.

For many companies, though, this is a major challenge. With customer data siloed across multiple channels, teams, and systems, customers can sometimes be left with a disjointed experience. Your personalization solution should process and synthesize all of this cross-channel information by storing behavioral, attribute, explicit, and third-party data within a unified customer profile (UCP) for each customer, prospect, and account.

The solution should also:

- “Stitch” together identities – marry profile data for anonymous users with known ones, once a person is identified (by logging in, email click-through, loyalty ID, and so on).
- Pass data to and from complementary systems – such as CRMs, email and marketing automation platforms, and POS systems.
- Power the delivery of omni-channel personalization in real time.

The Role of Testing

Once your campaigns are live, it's important to test them. By testing different experiences and algorithms, you can optimize your personalization efforts – maximizing engagement, conversions, revenue, or other goals. Your personalization solution should offer a simple way to conduct A/B testing (comparing experiences, messages, images, subject lines, algorithms, and so on against each other), measure lift over control, evaluate the impact against any single goal (or all goals), and filter results by segment.

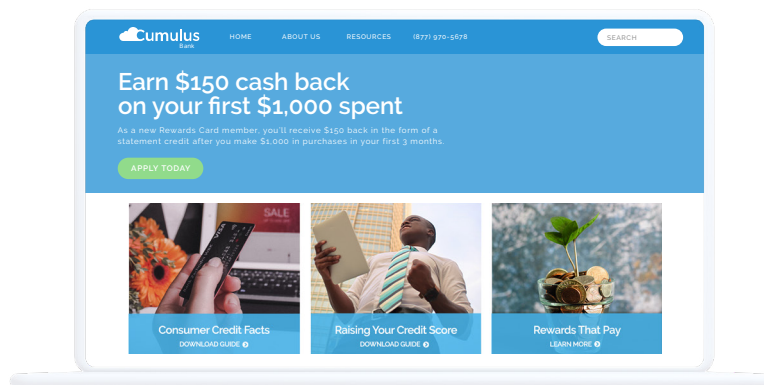
*Salesforce “State of the Connected Customer” report, 6th Edition

Examples: B2C

Here are some ways business-to-consumer companies use real-time, AI-driven personalization to drive engagement and conversions.

1. Increase the ROI of every site visit.

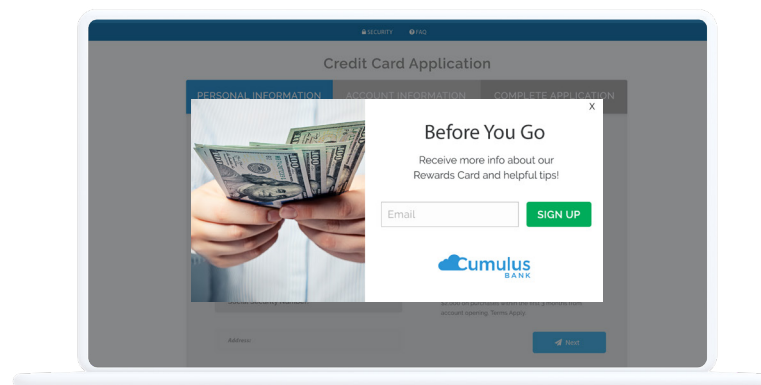
Each time visitors arrive on your site, even if they're anonymous, they provide clues about their interests and attributes – depending on how they arrive, where they're located, what they engage with, and much more. Knowing this information, you can tailor the homepage and any landing page in real time to make it more relevant to them.



Since this visitor previously clicked on an ad for Cumulus' rewards credit card offer, the bank's homepage hero banner and content recommendations underneath are personalized with relevant resources and calls to action – making it easy for the person to find what they need.

2. Build your first-party data.

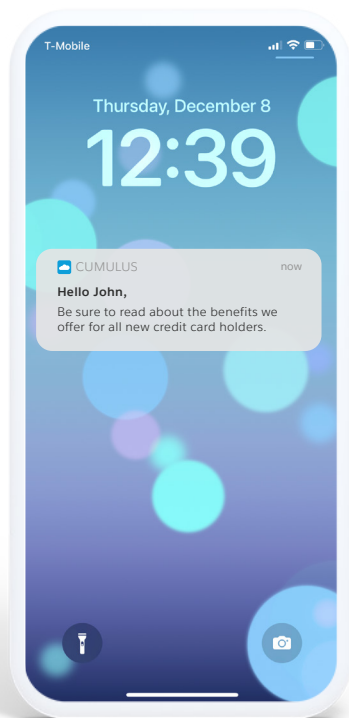
Make email capture campaigns and other sign-up offers more effective by targeting them to specific visitors – timing the message to appear when the person is engaged and likely to be receptive.



When an engaged visitor on Cumulus' credit card application page is about to abandon the site, this message is triggered. Based on the person's time on the site and the interest they've shown, they may be willing to provide their email address to receive additional, helpful information – enabling the bank to continue engaging with the prospective customer.

3. Trigger personalized notifications.

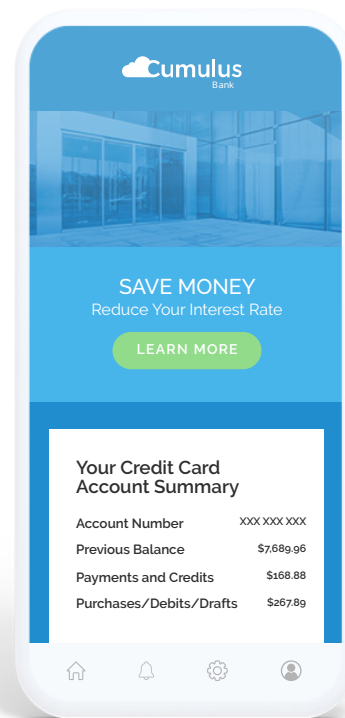
Improve reengagement by deploying targeted and timely email, push, or SMS notifications. These can be sent to segments of users – letting them know about a relevant, upcoming sale – or triggered at the individual level, based on someone’s geolocation, affinities, items left in cart, and more. Letting your customer know that their favorite item is back in stock, for example, is a great way to boost brand loyalty.



A mobile push message lets John know about helpful, new content – triggered and personalized based on his recently becoming a Cumulus Rewards Card customer.

4. Personalize mobile app experiences.

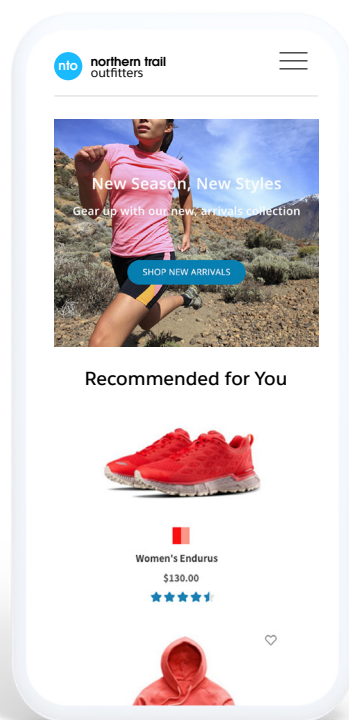
Present relevant in-app messages, offers, or recommendations while a customer is using your mobile app, based not only on what the person is doing in the moment in the app, but also on all the insights you’ve gathered about that individual over time – how they’ve engaged on your site, with your emails, with online ads, and with call center agents.



As the customer reviews his credit card statement via the Cumulus mobile app, he is presented with a contextually relevant article about reducing his credit card interest rate – helping build trust and loyalty.

5. Recommend relevant products and offers.

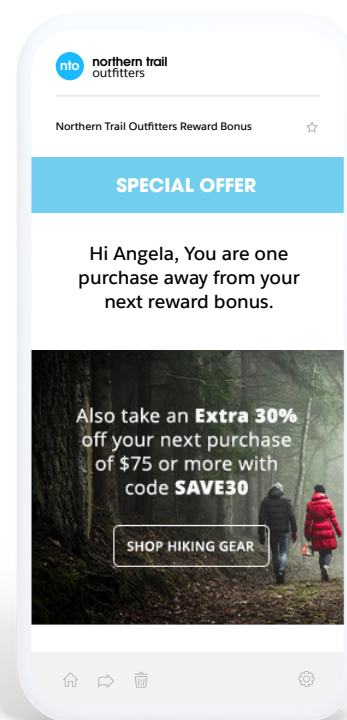
Embed relevant, real-time, 1-to-1 recommendations and next-best offers across any page or screen of your website or mobile app, and across your other touchpoints – such as email, call center, and paid media – for consistent brand experiences.



The “Recommended for You” items at the bottom of the page are uniquely tailored to this individual shopper. They’re based on her previous purchases and the interest and behavioral cues she’s shown both online (e.g., active time on page for particular categories/products, engagement with reviews, affinity for certain colors and brands, and so on) and across Northern Trail’s other channels.

6. Personalize emails at open time.

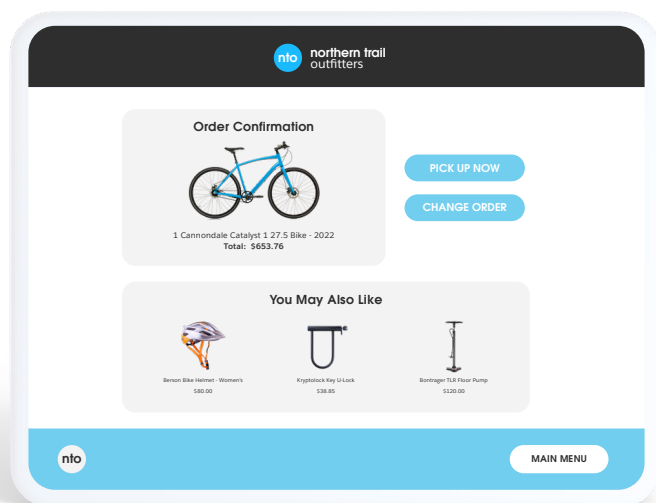
Engage your audiences with targeted emails – where personalized content, recommendations, or offers appear right when a message is opened. This way, campaigns factor in recipients’ up-to-the-minute activity across all of your channels, and you can promote new, relevant items (not what they just bought, redeemed, read, or downloaded).



Updated right as it's opened, this email shows the recipient how much she needs to spend before accruing her next loyalty reward discount. It also promotes a relevant sale in her preferred category (hiking) to encourage her to make a purchase and earn her next reward.

7. Deliver consistent messaging at point of sale.

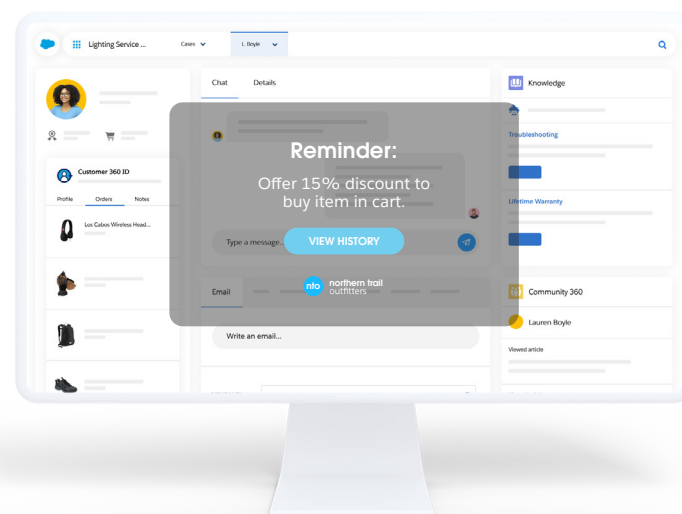
Provide personalized product recommendations or relevant, helpful messaging when a customer checks out at the register, logs in to a self-service kiosk, or uses an ATM. Knowing a person's physical location along with their full cross-channel history enables you to deliver highly tailored experiences while they're executing an in-person transaction.



When this shopper visits an in-store kiosk to pick up the bike she ordered online, she sees relevant, 1-to-1 recommendations on the screen – highlighting clothing (women's biking pants), gear, and accessories that complement her purchase, and map to her needs and preferences.

8. Trigger notifications to call center agents.

Trigger relevant and timely messages to call center agents when customers are on the phone to provide helpful and cohesive journeys. These notifications – personalized based on customers' onsite or in-app behaviors and histories, for example – can alert agents to next best actions and offers, or suggest ways to resolve an issue.



Prominent messages can be triggered and displayed in Salesforce Service Cloud, based on an individual's behavior and history across channels. In this case, because a customer who calls in has left a high-margin item in her shopping cart, a gray alert (upper left) lets the call center agent know that they should extend a 15% discount offer for completing the purchase over the phone.

Examples: B2B

For business-to-business companies seeking ideas and inspiration, here are some ways to employ real-time, AI-infused personalization.

1. Increase the ROI of every site visit.

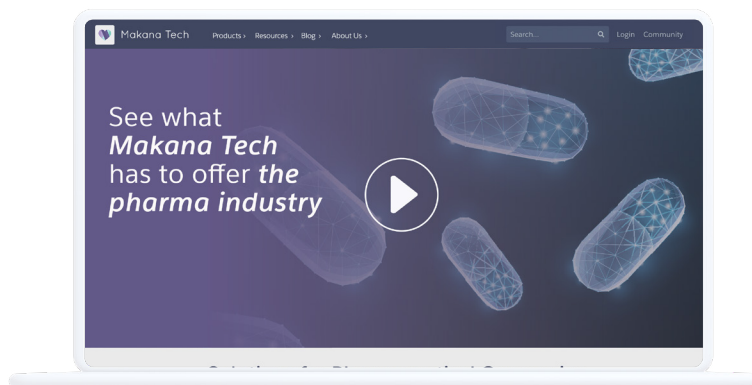
Show – don’t tell – prospects that your solution is the right one for their unique business needs. Based on each visitor’s source, location, behavior, history, and other data, you can present them with relevant, helpful messaging in the moment to engage them faster, reduce your bounce rate, and drive more qualified leads.



A prospect who clicks the Makana Tech online ad, above, immediately sees consistent messaging and offers on the Makana website – creating a cohesive and unified experience that shows the visitor they’re in the right place.

2. Improve ABM with industry targeting.

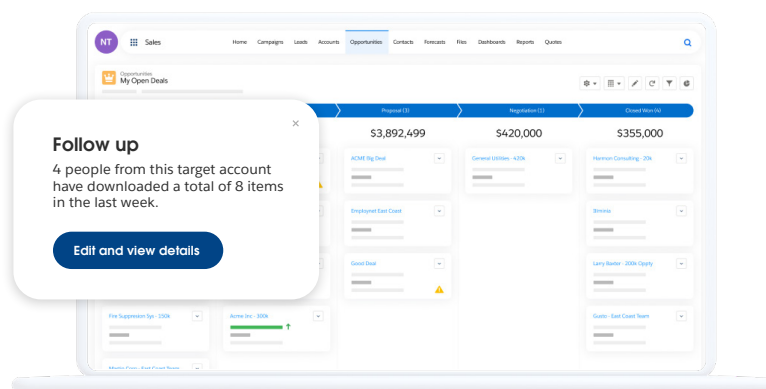
Recognize and target high-value visitors the instant they hit your site. You can put the most relevant content and messaging in front of them immediately – providing experiences tailored to their industry, size, or even specific company, to accelerate their interest in your solutions.



Makana Tech can immediately detect when a visitor from a target account and industry lands on its site. For this prospect from a pharmaceutical company, the Makana Tech homepage is tailored to show relevant videos, content, and calls to action.

3. Increase deal velocity and deal size for target accounts.

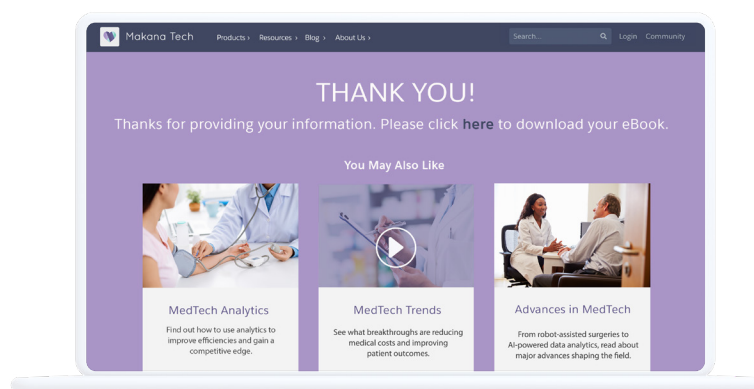
Are prospects from a target account demonstrating high activity and engagement on your website or across other touchpoints? You can automatically trigger alerts to the right reps in your CRM with a recommended next best action – so they're able to follow up intelligently and while interest is hot.



A high volume of content downloads from people who work at this target account triggers an alert to the appropriate sales rep in Salesforce Sales Cloud, suggesting the next best action she should take.

4. Increase customer adoption and lifetime value with relevant content.

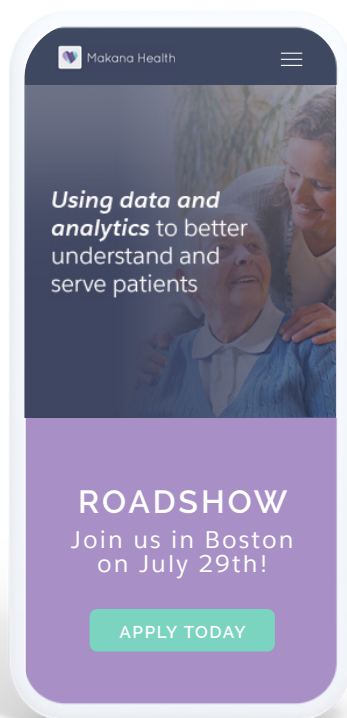
Even if you have a lot of great content, it's often not easy for prospects to find what they want and need. Use 1-to-1 content recommendations to promote the most relevant asset (e-book, video, article, and so on) to each person visiting your site, using your app, or opening your emails – engaging prospects and guiding them along the buyer's journey.



After this visitor registers to download an e-book, he sees personalized recommendations for other content that's likely to engage him. The recommendations are assets he hasn't previously consumed and are based on his preferences and interests.

5. Drive registrations for webinars and events.

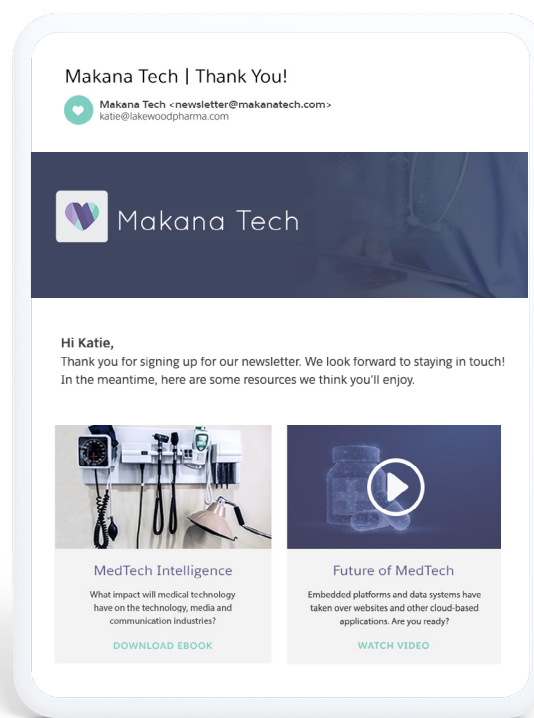
Drive greater visibility and attendance to your virtual and physical events by promoting them to the right audience. Across your touchpoints, you can highlight webinars and events that align to individuals' interests, personas, or geography to generate more registrations.



Detecting a visitor's location, Makana Tech can instantly promote an upcoming local and relevant event to drive attendance and improve lead generation.

6. Integrate email and website experiences.

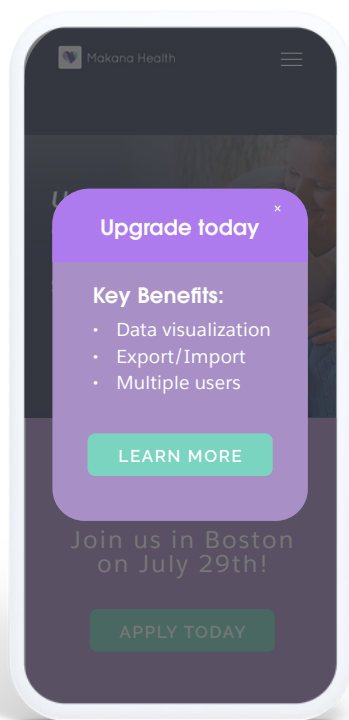
Your email campaigns and website experience should be working together to help prospects navigate the buyer's journey. With open-time email personalization, you can dynamically tailor content when an individual opens a message – not when it's sent – to reflect that person's latest interactions and activities on your site (and across your other channels).



Katie is a new subscriber to the Makana Tech newsletter. Based on the preferences she indicated and the content she has viewed across Makana's channels, this e-book and video are being recommended for her. These are items she hasn't engaged with yet, and after she downloads or watches them, if she reopens the email, the content will dynamically adjust to showcase new relevant items.

7. Drive adoption by freemium users and new customers.

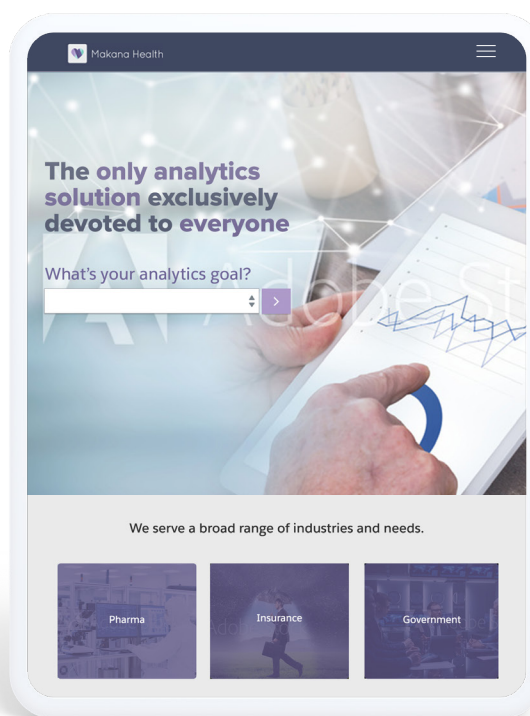
You can use behavioral data from logged-in users to improve their experiences and engagement in real time. For example, educate freemium users with timely, in-app updates, and target engaged users with messages about the benefits of various features. Guide new, logged-in customers with onboarding content and relevant tips, tailored to their specific needs.



This power user of Makana Tech's mobile app has logged in five times this week. Based on the user's interest and activity, Makana can show them a message about the benefits of upgrading to the more robust paid version.

8. Collect zero-party data with personalized surveys.

Looking for more specific data about your customers and prospects? Ask them directly, using personalized and targeted surveys on your web and mobile properties. Responses are added to each person's profile to enrich your database, and they can even trigger helpful, personalized experiences in the moment – showing respondents the value of engaging.



When web and mobile visitors answer the “What’s your analytics goal?” survey question, the response they select dictates what they see next – guiding them to the content and solutions that will be most useful for their needs.

CONCLUSION

Increase Marketing ROI with Salesforce Personalization.

Make the dream of 1-to-1 engagement across channels a reality with Salesforce Personalization. Each day, Personalization delivers automated, AI-driven experiences to billions of people across the world. It helps companies increase conversion rates while building engagement and loyalty.

The more relevant your message, the more engaged a customer will be with your brand. And higher engagement rates lead to increased conversion. It's a win-win for your customers, and for your business.

With Personalization you can:

- ✓ **Capture individual insights**

Deep behavioral tracking, data aggregation from various sources, and affinity modeling shine a light on each person's true interests and intent.

- ✓ **Deliver optimized experiences with AI**

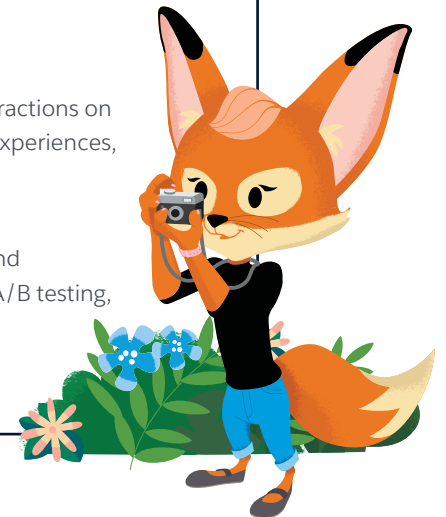
Marketer-friendly, customizable algorithms interpret the data and make decisions in real time (less than 30 milliseconds), so every interaction is relevant at the 1-to-1 level.

- ✓ **Coordinate engagement everywhere**

Everything you learn about someone from their interactions on one channel can be used to improve that person's experiences, in the moment, in the same channel or any other.

- ✓ **Test and analyze experiences**

You can optimize your personalization campaigns and customer engagement efforts throughout ongoing A/B testing, reporting, and analysis.



Want to learn more? Request a demo today at sfdc.co/mc-personalization-demo.

