

A black and white photograph of two young women walking down a city street, smiling and looking at their shopping bags. The woman on the left is wearing a denim jacket and a patterned shirt, while the woman on the right is wearing a cardigan and a patterned skirt. They are both carrying large paper shopping bags. The background is a blurred city street with other pedestrians.

10 personalization tactics

It's not as hard as you might think. Grab these low-hanging approaches to context marketing with Sitecore and get started—now.

BY SITECORE BUSINESS OPTIMIZATION STRATEGIES



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Introduction

Personalization is a tactic that most marketers would willingly deliver, but our research shows that very few actually do. Personalizing customer experiences, whether on your website, in an email push, or a social media campaign, requires you to deliver content that takes into account the context of customers' current and previous brand interactions. At Sitecore, we call this "[context marketing](#)."

It is an approach that delivers measurable, relevant experiences that improve performance, build loyalty, and drive real results across each of your customer engagement channels. Context marketing empowers businesses to know every customer and shape their experiences in real time and at scale.

The good news is that personalization through context marketing is part of the Sitecore® Experience Platform™ functionality. As a Sitecore user, all you have to do is start using it.

Personalization vs. context marketing

And, by the way, if you're wondering how personalization differs from context marketing, you're in the right place. Context marketing is, essentially, personalization on steroids. Marketers often personalize emails, or they may even personalize web content, but very few deliver a personalized experience across any channel in real time—such that what the user starts to do on one channel can be completed on another. That's context marketing, and it requires contextual intelligence on customer interactions, robust content management, and omnichannel automation so content can be distributed on any channel. For purposes of this paper, though, since we're talking specific channel tactics, we'll use the more accurate term "personalization."

When the Sitecore Business Optimization Strategies team, or SBOS™ for short, works with clients, we base our personalization tactics on the client's level of experience. We factor that in with the potential that personalization holds for delivering business value and the effort required to implement a personalization tactic.

Depending on the client, we encourage an incremental approach—one that allows them to learn the more basic ways to personalize experiences before they move ahead to more sophisticated tactics. It is a process we describe as crawl,

About SBOS

Rather than focusing on the technical aspects of implementing and using the Sitecore Experience Platform, the Sitecore Business Optimization Strategies team (SBOS) is a best practices resource that helps establish the digital maturity of your organization and identify where you want to be—and then provides practical plans for getting there.

[Learn more about SBOS](#) and drill down into the details of how the team helps customers get results.

walk, jog, and run. For the purposes of this paper, we have focused mostly on crawling and walking. Only one tactic—number 10—is for those of you who are ready to go on a jog.

Tactic 1: Give first-time visitors a special welcome

It is as true for websites as it is for people: First impressions last a lifetime.

New visitors represent a special opportunity, and not just because you have a chance to nab someone who has not visited your site previously. They give you an occasion to express something about your brand and its values. By giving them a special welcome through personalization, you are telling them how much you appreciate them. You are also showing them that your company treats its customers with exceptional care. In today's world, that much alone could distinguish you from your competition.

A first-time visitor to your site may be at the start of a buying journey. But they may be in the midst of it, too. Help them get to content based on where they are. Welcome them to the site and offer "how-may-we-help-you" content with different directions to different site areas. But note this doesn't literally have to be a direct and overly obvious "Welcome" sign. It can be more implicit, highlighting different paths they can take. Through those paths, you can begin to understand their in-the-moment intent.

One note: Not all first-time visitors are new. They could be using a new device. We recommend keeping the welcome message brief. As quickly as possible after that, move them to a topic they are interested in.

Effort to configure: Low (estimated at 15 min.)

How to do this in Sitecore: Sitecore tracks how many times someone has visited your site. We simply use that intelligence as the trigger for personalization. Greeting a new visitor is one of the easiest things you can do in Sitecore. All you need to do is enable personalization by creating a rule based on “first visit.” You do so in the Sitecore Experience Platform (XP) Rule Set Editor, a capability used throughout Sitecore XP which applies logic-based rules to content management.

Tactic 2: Treat existing customers like existing customers

How would you like to walk into a store, only to have a clerk show you the same pair of shoes you bought from him yesterday? You would be offended they did not recognize you, right?

Today, when people are buying so much online, the same etiquette applies. There is nothing worse for a customer than buying a product or service through a site, only to return the next day to see a promotion for what they just purchased asking them to invest in it again, again, and again.

In our experience, we see too many sites that remain focused on new customer acquisition—even when a good portion of traffic comes from existing customers. Existing customers have good reasons to return. They may be seeking more information about something they just purchased. They may need help using a product. Perhaps they are so pleased with what they bought, they want to see what else you sell.

Tailoring the experience to provide white-glove treatment to an existing customer helps keep customers happy. Happy customers make for up-sell and cross-sell opportunities—good for them, great for you.

Return customer visits also provide the opportunity to nurture them as advocates, worth their weight in gold at a time when customers can use the bullhorn of social media and when buyers are more likely to believe another buyer than a brand.

Focusing on existing customers can also help reduce support calls and other customer service inquiries, reducing costs in those channels.

Effort to configure: Low (estimated 30 min.)

How to do this in Sitecore: There are many features built into Sitecore that help you distinguish a new potential customer from one you have already won over. You can:

1. Tag email campaigns sent to existing customers using the *SC_camp* tag and use that as the identifier. If you are using Sitecore’s Email Experience Manager, it adds the tagging to the email link automatically.
2. Create an alias—*yoursite.com/customers*—that is only shared with customers who have already visited your site.
3. If the customer conversion or commerce transaction happens on your site (e.g., if your site has e-commerce), use the conversion goal as the trigger.
4. Hook Sitecore to your CRM and use its customer status field to determine if you are dealing with an existing customer.
5. Use site behavior to identify an existing customer. For example, browsing in the support section could help match for that.

Tactic 3: Connect and retarget inbound experiences

Many of our clients have already implemented—some even mastered—the art of generating inbound traffic. They are generating volume traffic to their sites from search engine marketing (SEM), search engine optimization (SEO), display advertising, social media targeting, social posts, email campaigns, and so forth.

When a customer arrives at your site from one of these inbound sources, they often show up with intent—a purpose triggered by the message contained in the pay-per-click (PPC) link, display ad creative, an email, Facebook post, a Tweet, Instagram photo, or any of the other growing number of social channels used by customers.

If you are working with an automotive brand, your site has a bottom-line purpose. You must engage a customer to drive a lead—get them to book a test drive at one of your dealerships,

for instance. To do that, you will probably launch different SEM campaigns, targeted to different keywords or phrases, such as the different car models, usage, financing options (e.g., leasing), and so on.

Let's assume you have a campaign promoting how well your model did in safety tests. When a customer arrives on your site from a search campaign touting those results, you have pretty good insight into their intent: They are probably considering buying a car with leading safety features.

You already have them on a landing page showing your test results. But as they continue their journey to learn more about a particular model, you might serve up page components showing messages related to airbags, collision-warning systems, or stability control.

Perhaps you are planning to send an email to all customers who have bought a new car within the last six months. They click on a link in the email to your site. The click's source alone generates relevant data points: They are an existing customer, and they have a new car—and are most likely not in the market to buy another one.

This should be used to create a relevant, personalized experience. Do not show them content promoting new cars. It is too soon. Instead, serve them content that promotes maintenance deals or accessories.

Linking outbound campaigns and inbound traffic to personalized experiences can reduce spending on outbound efforts yet maintain conversions. Or the same spend will generate more conversions. Either way, it is a win.

Effort to configure: Low (estimated 45 min.)

How to do this in Sitecore: To map the inbound source and the intent of the customer, you will need to have a token, or what we call a "Campaign ID." It is also known as a Unique ID, or UID. It is attached to the inbound URL. It would look like this:

`www.yoursite.com?sc_camp=UID`

The UID is the reference we use for personalizing the experience with rules in selected spots. For example, a rule in Sitecore could say this: Where Campaign ID equals UID, show the safety-focused hero banner.

Tactic 4: Leverage geolocation

With a geolocation service, you can get information about a customer's country, state, metro area, city, or ZIP code. You can also determine where they are within feet by obtaining their longitude and latitude. In many cases a customer's location can be used to serve up content specific to the location. For example, their smartphone could tell you if they are at or near a retail store—a cue to provide them content personalized to help them get to the store with directions.

If you are a retailer with multiple stores, you could use geolocation personalization to highlight the closest stores based on where the customer is. Serve content consisting of directions and/or coupon offers to attract them to the store. An amusement park operator may offer onsite schedule information regarding rides near the customer's location. Many other opportunities exist.

When someone is on a smartphone, they are probably not in a mode—or mood—to browse. For them, the fewer clicks they have to make, the better. Personalizing their experience could reduce the number of clicks involved. Making the interaction more relevant—and efficient—is likely to enhance your conversion rate.

Effort to configure: Low (estimated 30 min.)

How to do this in Sitecore: It does not take much to link location to personalization. It is especially easy if you have purchased [Sitecore's IP Geolocation Service](#). Then, all it takes is to enable personalization based on geolocation.

If you purchase lookups based on the Sitecore IP Geolocation Service, your geo-intelligence data will be enriched and will be available for use with personalization. To personalize a page or component based on geolocation, just create an appropriate rule.

Tactic 5: Connect personalization to conversions

Static sites often promote the same calls to action (CTAs)—sign up for a newsletter, download a white paper, register for a special offer. These CTAs often occupy a site's best real estate, for good reason. They generate valuable conversions, even

leads. If you have been tracking your customers' journeys through your site, then you should have a good idea of where they have been converted.

For many companies, converting a visitor to a *known* contact is a key digital marketing goal. For a B2B company, acquiring a name, title, and email address often comes by offering a white paper. For B2C, acquiring identifying data could come from creating an account or signing up for a loyalty program. In either case, the information represents a new and valuable lead.

Since a lead is worth so much, treat it as such. Use such precious data to tailor your content to such high-value customers. For B2B companies, that could be showing them case studies. For a B2C company, it could be an opportunity to offer them more information about benefits to members.

You can use that data to present them new CTAs. Instead of asking them to sign up for a newsletter, you could personalize the experience by offering them, say, a membership with special benefits, bringing them closer to you and nurturing their loyalty.

If nothing else, it will help you avoid giving them irrelevant content—a turnoff.

Effort to configure: Low (estimated 30 min.)

How to do this in Sitecore: Providing personalized content to converted customers requires little effort with Sitecore. In Sitecore XP 8.1, you can also personalize based on a customer's previous interactions. Here are the steps:

1. Create digital conversion goals—those assets you want downloaded or forms filled out.
2. Trigger digital goals with either Form Submit or a conversion “thank you” page.
3. Enable personalization based on the triggered goal.

Tactic 6: Take their mobile context into account

Your customers are on the go—they're mobile, walking on the street, passing through the airport, commuting from work, strolling into your store. Their attention span is also getting shorter. This is your chance to deliver a relevant experience based on their mobile context.

With the proliferation of smartphones, many companies are embracing a mobile-first approach to their digital assets. They are designing a mobile site first, a desktop site second. But this is a device-centric approach in many cases. It fails to sufficiently consider what customers are actually doing as they use their phones or tablets.

Instead of just presenting a responsive site to your customers, take full advantage of their devices by using insights about location or venue to provide the most relevant experience (see Tactic 4: Leverage geolocation).

Effort to configure: Low (estimated 30 min.)

How to do this in Sitecore: Taking a customer's mobile context into account is not difficult in Sitecore. All you need to do is enable personalization in select spots based on mobile device and customer insights, such as their location and your venue.

You can purchase location lookups based on the Sitecore IP Geolocation Service, and information about the customer's device with the [Sitecore Device Detection service](#). These will enrich your intelligence and provide data to be used for personalization.

In the spot you want to personalize, you can apply a rule based on your customer's device and location.

Tactic 7: Take advantage of visitor profiling

One of Sitecore's most valuable capabilities is its power to collect data, in real time, at scale. Yes, it also tracks a user's history of previous interactions. But the data it generates is so up-to-the-minute, we call it “in-the-moment” behavior. Sitecore enables you to understand—even predict—a customer's interests accurately enough to present them with the most relevant, related content you can offer, at the very moment they arrive on a page or spot on your site.

Most sites have different sections, such as Products, Services, Pricing, Our Blog, About Us, Contact Us, and Careers, to name a few. Knowing which of these sections a customer is engaging with can help determine their intent. Sitecore can profile a visitor based on their activity, enabling you to offer content based on their profile. For example:

- Make a discount offer to someone who's visited the pricing page.
- Call out your most popular posts for someone who has visited your blog.
- Tout your newest product for customers browsing your products section.

User profiling is a basic, and easy, way to start capitalizing on some of Sitecore's most powerful personalization features. Profiles also enable you to offer content based on website interest. Other profiles which could be considered in Sitecore include:

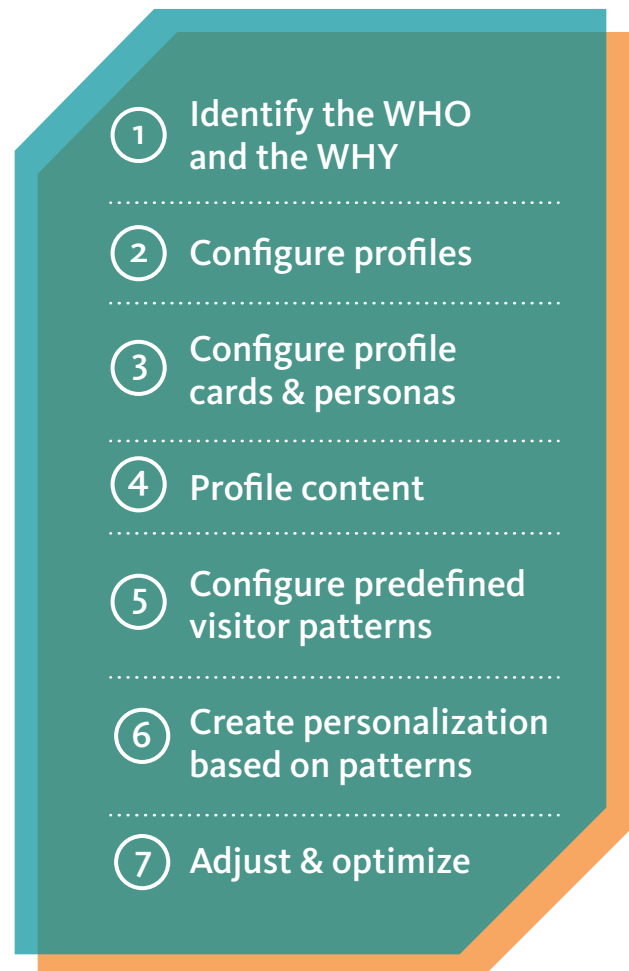
- **Stage in customer journey (or customer life cycle).** This supports content consumption by section. For example, presenting "About Us" content might be mapped to an early-stage customer. Detailed product pages might be mapped to the later stages of a customer life cycle.
- **Product/service categories.** These profiles help you understand which specific product or service categories interest a customer the most.
- **Industries.** This profile offers many, many opportunities for personalizing the content you present, especially if your company offers products or services for many verticals.
- **Personas.** Sitecore allows you to predefine personas. Perhaps you have created distinct content for each of them. With Sitecore, you can use that to map a browsing customer to a persona and use that as the basis on which to personalize additional content along the customer's path.

Using profiles has two distinct advantages. One is that we have seen them substantially increase conversions. Second, customer profiles based on their implicit browsing behavior yields improved analytics and, as a result, superior insights—so superior, in fact, that many of our clients have used them to inform their overall marketing plan, mix, and budget.

We highly recommend using Sitecore's profiling capabilities. But it does require some effort to identify the needed profiles.

Effort to configure: Medium (estimated 180 min. plus additional time to profile content).

How to do this in Sitecore: It's a seven-step process:



We can summarize the process in three steps:

1. Create **profiles** (including profile and pattern cards).
2. Profile content. This can be a step-by-step approach, starting with high-traffic content.
3. Personalize based on built-in rules, for either a match on a pattern (recommended) or the profile values.

Creating profiles also comes with a bonus: They are also used in Sitecore Experience Analytics. As such, profiles can help you determine segment behavior, identify your best-performing content, and spot which channels and campaigns are best for attracting any given segment.

Your team may find that you do not have enough profile-specific content to profile, which leads the team to create more specific and compelling content, improving profiling and personalization.

Tactic 8: Score your customers

We also help our clients personalize their content by stepping them through two different processes. Both enable them to rate a customer. This rating, or scoring, also allows them to be proactive. The ratings take two basic forms. One is the “lead score.” The other is a “churn score.” Both terms should be familiar to you since “leads” and “churn” represent business basics.

A lead score can help determine a visitor’s likelihood to become a customer based on their digital activities. Their lead score—low, medium, or high—can be used to show relevant content that helps move them through the stages of sale or down that oft-cited sales funnel.

Typical B2B organizations will benefit from using lead scoring. They are especially applicable to those companies whose products and services require long buying cycles and involve different interactions with your site.

Lead scores can, like many personalization tactics, help increase conversions. But they can also be used to model forecasts, based on the number of visitors at a variety of score ranges. We recommend grouping scores into three elementary categories—low, medium, and high. You can then map these categories to measures such as average sales cycle time, average order size, and number of active leads. This can then help you understand where you stand against your budget or targets, which can then be used to re-calibrate your efforts in a particular area.

Looking at site content and activities, we recommend basing lead scores on how likely the visitor is to become a customer after consuming the content or engaging with a particular activity. For example, when a visitor:

- Looks at your product pages, assign a score of “1.”
- Looks at pricing pages, assign a score of “5.”
- Makes the effort to download a case study, assign a score of “10.”

- Spends the time to watch a product demo, assign a score of “20.”

The lead score aggregates. So, in our example, looking at a pricing page and subsequently watching a product demo would score a visitor as a “25.” You can then use these scores to map a personalization result. For example, a:

- Low lead score (below 10) would trigger a rule to serve a thought leadership blog post.
- Medium lead score (between 10 and 30) would trigger a rule to serve up case studies.
- High lead score (above 30) would trigger an invitation to get in touch.

You can also use a “churn score” to help understand if an existing customer is about to leave you. This is especially applicable to companies with content regarding a customer’s contract, their business terms, or cancellation steps. Churn scores are particularly pertinent if you measure the Lifetime Values (LTV) of your customers.

Effort to configure: Medium (estimated 120 min. plus additional time for scoring content)

How to do this in Sitecore: Lead and churn scores are created using a profile. So you can follow the steps from “Tactic 7: Take advantage of [user profiling](#).” Three basic steps are involved. They are:

- Create lead and churn score profiles (no need to create profile cards and patterns).
- Apply lead and churn scores to content and activities.
- Personalize based on the built-in rules for profile values.

Tactic 9: Let customers connect with social media accounts

The Sitecore XP version 8.x has native functionality called Social Connect. It allows you to capture customer information when they use their social credentials from Facebook, Twitter, or LinkedIn, for example, to sign in to your site. Social Connect makes it easy for customers to register because it relieves them of the need to remember yet another username

and password. But Social Connect also has many advantages for you. It is a far faster way to provide you better insights about your customers, so you can provide the most relevant experience, based on the data they share with you from their social accounts and which is stored in Sitecore XP's Sitecore® Experience Database™ (xDB).

Social Connect should provide you with a deep well of demographic and psychographic data, too. Analyzing segment behavior with social data can help you understand who your personas are or the difference in behavior based on age, gender, and interests (if the customer allows that information to be shared from their social channels). This, in return, can be used to acquire new customers, based on who matches your segments.

We recommend using Social Connect if most of your customers are using social media networks (who isn't?) and you have forms or account authentication on your site.

Depending on your business, you should select the appropriate social connection—LinkedIn for B2B and Facebook for consumers, for instance.

If you are a B2C company that wants to attract users into a member club, for instance, then you will typically have a form where you collect certain data from your customers. Instead of making them fill out a form, present them with an option that allows them to “Connect Using Facebook.” This simple step allows you to authenticate the user. Better yet, it gives you access to data about them—name, email, phone number, country; and interests, likes, groups, etc., depending on what they share. This data may be stored in Sitecore xDB (and can be updated frequently).

You can use this data—such as interests—to present a better experience for the visitor. If a visitor has an interest in movies, say, you could use that information to promote content for a contest with movie tickets as a prize.

Social Connect also allows you to save the data you are seeking to acquire through a particular social media account. After the customer has connected to your site using social media account credentials, you can access their data in xDB and in the Sitecore® Experience Profile®.

Effort to configure: Medium (estimated 240 min.)

How to do this in Sitecore: We recommend Social Connect to clients who are beyond the “crawl” stage of personalization and are ready to “walk.” The basic steps include:

- Configure select social media networks in Sitecore and within each social media network.
- Enable Social Connect.
- If needed, add a couple of custom rules, depending on social media data you want to use for personalization.

Tactic 10: Make a journey map

This final tactic is for more advanced Sitecore clients—one to apply if you have gotten through the “crawl” and “walk” phases of personalization. For this tactic, you should be prepared to jog.

While it takes more effort and experience, preparing a journey map is one of the most fruitful exercises we recommend to clients, especially those who already have a solid understanding of their customers' intent and objectives at different stages. Those stages can consist of:

- Multiple interactions with your digital channels
- A discrete process for evaluating your product or services
- Having been a longtime customer
- Looking for deeper insights about your product, service, or industry

The result of mapping the buyer's journey is that you will provide your customers with an experience personalized to a specific milestone. This means they will be more engaged. Deeper engagement leads to more conversions.

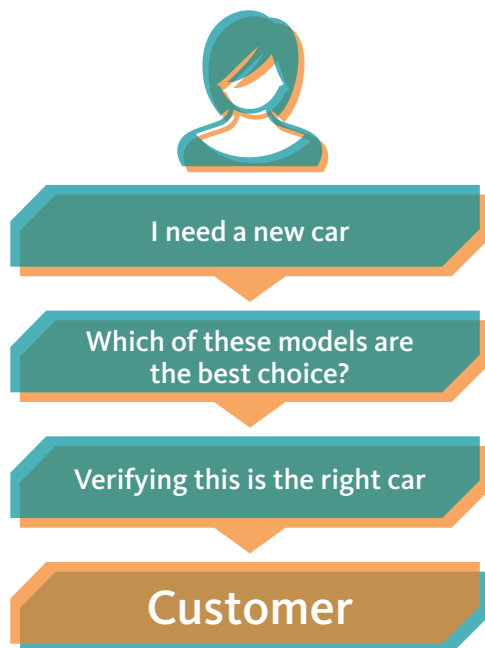
Journey analytics can provide you with insights that can be used to identify content gaps and build even richer experiences.

Let's take a very simple journey—a customer's journey to buy a new car. We can break it down to different stages:

- **Need.** They start their journey with a need. For example, their old car needs to be repaired, but the costs nearly outweigh the car's trade-in or resale value.

- **Research.** The customer looks broadly at different options—brands, models, safety features. As they go deeper into the research, they will narrow the options.
- **Decision.** They make a selection from among a short list of possible brands, models, and features, as well as based on their experience with the dealer.
- **Customer.** They end their journey by purchasing a car. A new journey begins—the onboarding experience.

Mapping the customer journey



By mapping the journey digitally, you can provide the most relevant experience in context of customer needs.

Effort to configure: Medium (estimated 300 min.)

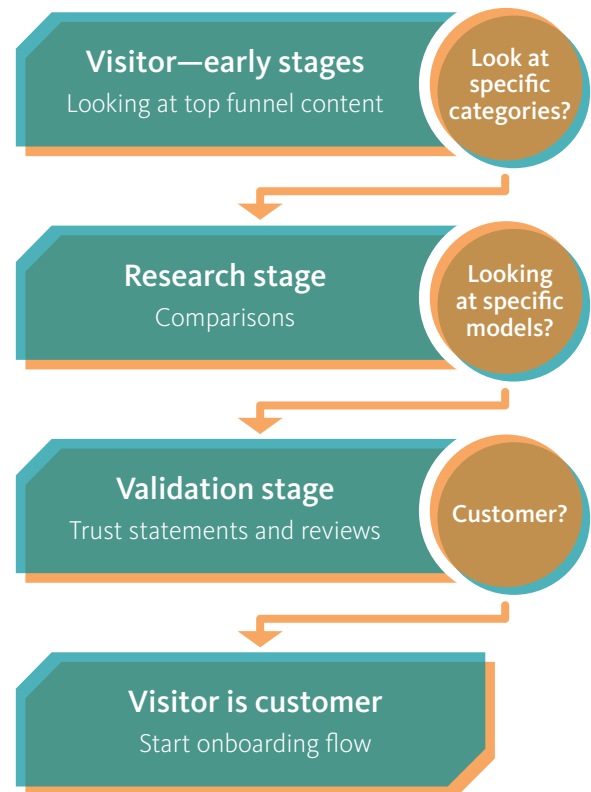
How to do this in Sitecore: You can create various journey maps using Sitecore's Experience Automation capabilities. They can be simple or very complex with multiple triggers and paths. You will enable different triggers (e.g., certain goals completed), which helps you guide and support the visitor through the journey map. Using journey maps in Sitecore consists of three basic steps:

1. Create the journey map using [Experience Automation](#).
2. Apply triggers that add a customer to a journey map

and starts moving them to the right stages, based on their behavior.

3. Personalize content at each stage.

Automating the customer experience



Sitecore XP's Experience Automation lets you set up triggers according to where customers are on their journey with your brand.

Next steps

Today's digital customer travels a complex journey through multiple digital channels. For an organization to achieve its objectives, it must tap into that visitor's journey at multiple points and across multiple channels—it must use personalization to market in context. A key focus of the SBOS team is enabling organizations to measure, generate, and optimize engagement among customers and potential customers. If you're interested in learning more about SBOS, point your browser to our [website](#) or visit the [SBOS Academy](#) collection of assets.

About Sitecore

Sitecore is the global leader in experience management software that enables context marketing. The Sitecore® Experience Platform™ manages content, supplies contextual intelligence, and automates communications, at scale. It empowers marketers to deliver content in context of how customers have engaged with their brand, across every channel, in real time. More than 4,600 customers—including American Express, Carnival Cruise Lines, easyJet, and L'Oréal—trust Sitecore for context marketing to deliver the personalized interactions that delight audiences, build loyalty, and drive revenue. For more information, follow us at @sitecore or visit sitecore.net.