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1:1

Personalization at Scale

How to create personal experiences that
power marketing performance and ROI

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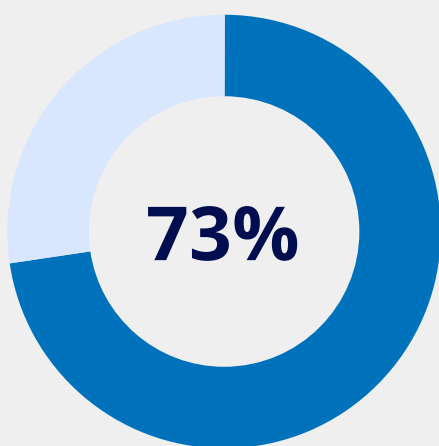
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Introduction

Personalization throughout a customer's buying journey is a powerful tactic to strengthen customer relationships that will drive business growth. With the right data and understanding of your customers, you can fuel your marketing strategies to personalize your interactions at scale, resulting in an outstanding ROI.

Comprehensive, actionable data will not only help you engage your customers better, but it also will help your team work more efficiently. All this together will yield a better customer experience, better results on marketing efforts, and better value on your marketing investments.

With the right overall strategy to support and execute your transformation, you'll be able to achieve sustainable, scalable success.



**73% of customers
expect better personalization
as technology advances¹**

¹ *State of the Connected Customer*, Salesforce, August 2023



Using Personalization to Drive Marketing Goals

A clear vision of your marketing goals will help guide your strategy toward success. These goals should address the future state of your customers, your marketing team and your business.

3 strategic marketing goals:

- ✓ Deliver a richer customer experience
- ✓ Unlock greater productivity in marketing
- ✓ Increase your ROI of marketing spending

What can you do to reach these goals? Start by getting to know your customers. Look at the current state of your data and customer experience. Is your customer data siloed? Are you able to segment customers for meaningful targeting? Are you able to track customer behaviors on your site?

Find the gaps in your data and capabilities to set goals for the future state of your data.

Key Shifts in the Personalization Experience

CURRENT STATE	Discounted data across the organization, hidden in silos and lakes	Broad segments lacking true personalization	Listen to the user experience	Unknown to known	Target users based on user affinities
	↓	↓	↓	↓	↓
FUTURE STATE	Unifying the right data about the individual, ready for marketing, in the hands of the business	Focused segments with personalized recommendations for 1:1 at scale	Ability to listen to web interactions and create affinities based on interests	Focus the user experience to convert an unknown visitor to a known user	Gather the user interests, create the affinity and target the user across channels
	BUSINESS READY DATA	MOVE TO TRUE 1:1	CREATE A USER PROFILE	KNOW YOUR USER	LEVERAGE USER AFFINITY

This most significant step is to connect your data across your organization. With this as your foundation, you'll be able to unlock the necessary capabilities to reach your first goal of delivering personalized customer experiences in the following steps.

1 Unify your data

Bring together disparate customer data sources into one place. With this unified data, you'll also be able to create comprehensive profiles that you can segment for targeted messaging. Once this data is unified, it will be easier to integrate it into your MarTech for activation.

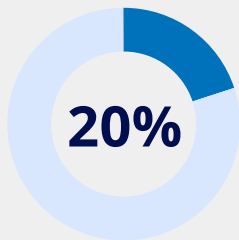
2 Personalize customer experiences

Leverage your data and insights to segment and personalize communications and recommendations. Add 1:1 personalization to your websites, mobile apps, emails, and SMS.

3 Make your customer feel seen

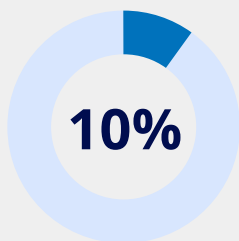
Use your customers' past behavior to deliver targeted recommendations and messaging. Immediately personalize their experience on current or return visits.

This personal 'just for me' feeling will drive results such as loyalty and higher purchase frequency.



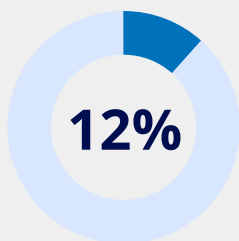
Increased open rate

Open rates (and click-through rates) go up significantly when complete personalization strategies and technology are in place to maximize your data on customers.



Increase in conversions

Target experiences early to see an increase in conversions from personalized offers.



Decrease in Attrition

Customer loyalty goes up when they feel like they are seen and understood by brands.



The next step toward achieving your goal of unlocking greater productivity for your marketing team is to focus on your marketing processes and tools.

1 Connect systems

Data isn't the only thing that needs to be unified. Your platforms should also be connected. This will enable your team to activate your data and create consistent messaging and campaigns across channels.

2 Democratize the data

Create a single view of your customers and data and make it accessible across the business from one place. This will allow your marketing team to improve the quality of segments, analyze your data, and identify more opportunities.

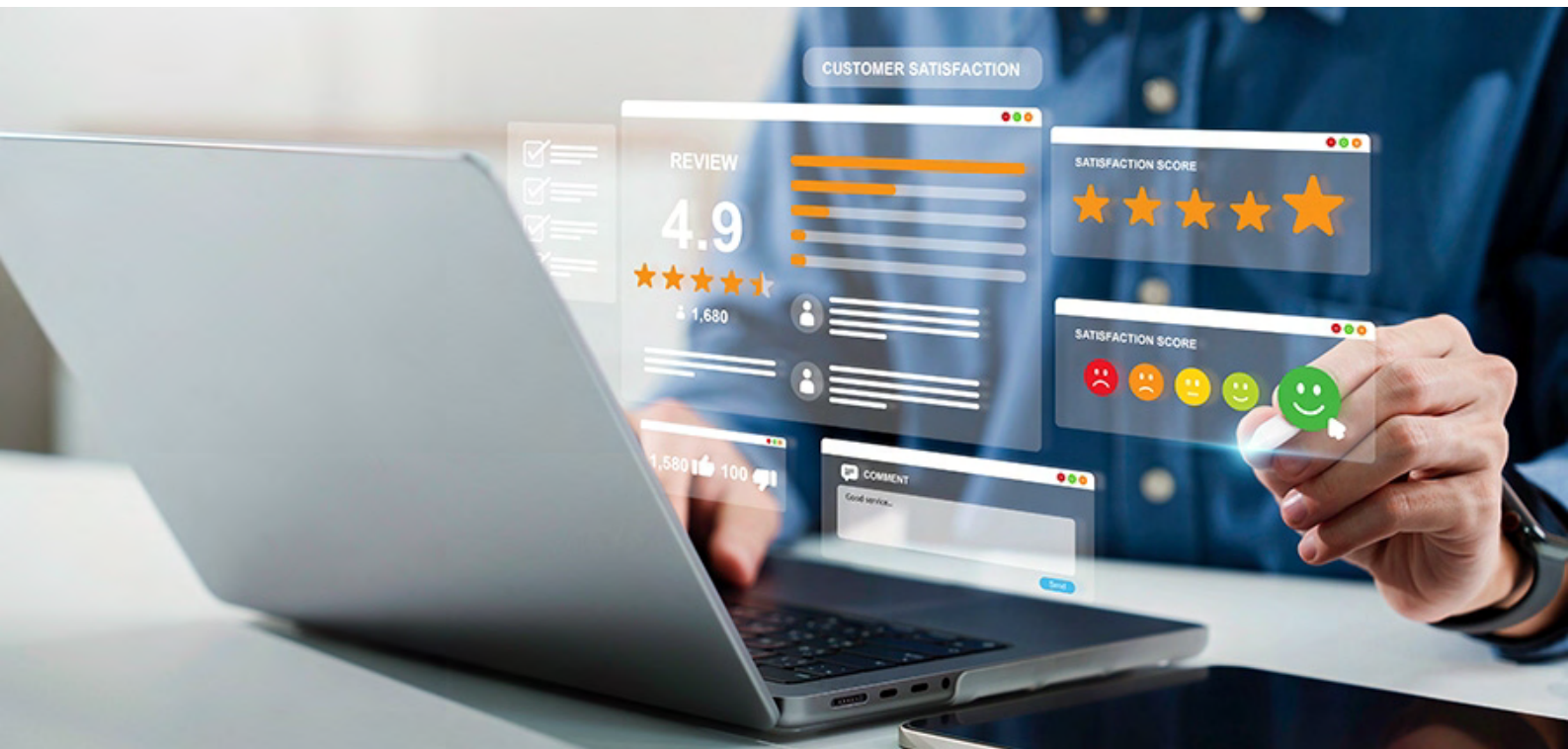
3 Create efficiencies

Automate customer journeys and marketing processes for greater productivity. Give your teams an extra boost with AI to help with content creation, predictive analytics, and targeted interactions. You can also use AI-driven segment discovery to find hidden groups. With more efficient processes, you can take a scalable approach to personalization and campaigns.

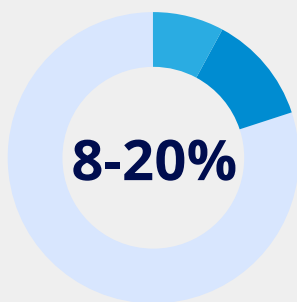


2 Hours saved per employee

An employee can save 2 hours per week by having data consolidated that can be leveraged in one place with Salesforce Data Cloud.



After reaching the first two strategic goals to deliver a richer customer experience and unlock greater productivity in marketing, you'll already be well on your way to meeting the third goal of increasing your ROI of marketing spending.



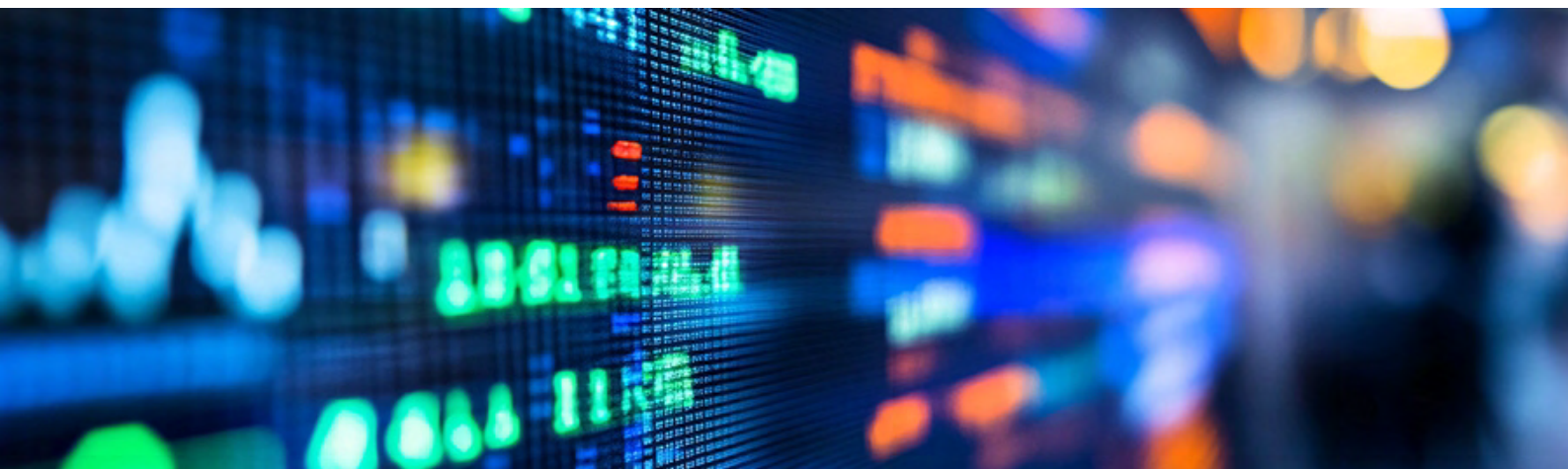
8-20% Revenue Uplift

In a full personalization program.

Along with reaching your overall business goals, you'll see benefits for your customers, marketers, and your business.

Key Benefits

Customer Experience	Marketers	Business
▲ Customer satisfaction	▼ Lower time to adapt campaigns	▼ Acquisition (CPA) costs
▲ Customer retention	▲ Open/click rates from messaging	▲ Return on ad spend
▲ Lifetime value	▲ Opportunity identification	▼ IT costs to run technology
▲ Referral rate / word of mouth	▼ Automation driving BAU costs	▲ Budget allocation to channels
▼ Return rates	▼ Data analysis resources needed	
▲ Purchase frequency	▼ Time to learn on new products	
	▲ Deeper segment understanding	



Personalization Solutions

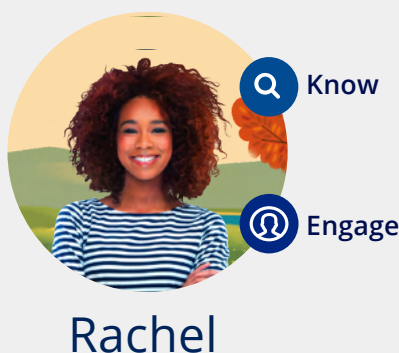
With connected systems and unified data, you can reach the ideal state of delivering real-time personalized experiences at scale.

The Ideal State

Connected systems

-  Web behavior
-  Social
-  CRM
-  Data warehouse
-  Analytics
-  ESP

Unified profile



Real-time, 1:1 experiences at scale



These tactics can be injected into your personalization program to help you see results faster.

Customer Retention

Use personalized journeys across your website and communications to drive customer retention. Personalize the user experience on the site by creating multiple experiences tailored to different user segments. Segment examples include New, Reorder, New Product Launches, Last Order Date etc.

Content Personalization

For content-rich sites, personalize the home page's content zones with recommendations for offers or content relevant to customer interaction and searches.

Lead Nurturing

Leverage personalization to entice visitors to the website into a call to action, such as filling out a form or giving an email address. Pass that email address to the ESP for lead nurturing and then leverage progressive profiling to gather more information from the customer. Additionally continue to personalize on the web and email based on user affinities.

UX Personalization

Use A/B testing to test and increase conversions. Leverage personalization to dynamically change content on specific pages and content zones to test control and test groups and their conversions. The goal is to learn which copy and UX design is performing better.

Price Testing

Target distinct A/B test groups with specific product recommendations. Use a recipe to ensure each test group is shown a designated product. Redirect users in the test groups who attempt to view the original priced product to the product they are eligible for.



Transforming with Success

Transforming your business is time-consuming and can be a significant investment. It can require many changes in processes and thinking as well as adoption by everyone on your team. To help safeguard the success of the changes, you need to ensure trust in this transformation. Your organization must have trust across the different aspects of the transformation.

Vision Trust

Are we confident that our leaders are aligned with the customer's needs?

Technology Trust

Are we confident that we understand the capabilities needed for the customer experience?

Change Trust

Are we confident our people and ecosystem will adopt it?

Cultural Trust

Are we comfortable being uncomfortable with the speed of the execution plan? Is failing fast acceptable?

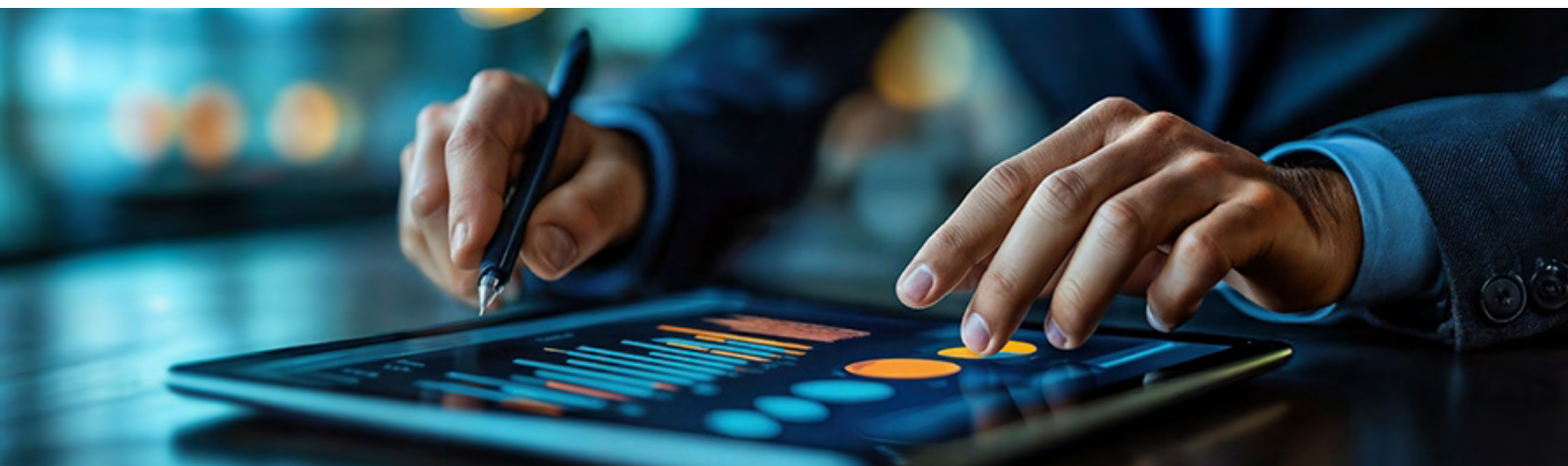
Financial Trust

Are we confident in the investment needed to achieve the milestone-based outcomes?

Data Trust

Do we know what data we have and need, as well as its quality, ownership, governance, and accessibility?

When this trust is in place, you'll have alignment across your business teams that will increase the adoption of your new solution enabling your business to reap the benefits of it faster.



Conclusion

The journey toward personalization is not just a technological upgrade but a strategic transformation that can redefine customer relationships and drive substantial business growth. By leveraging comprehensive and actionable data, businesses can create personalized experiences that resonate with customers, leading to increased loyalty, higher conversion rates, and, ultimately, a significant uplift in revenue.

The key to success lies in unifying data across the organization, enabling seamless integration into marketing technologies, and fostering a culture of trust and collaboration. This approach not only enhances the customer experience but also empowers marketing teams to work more efficiently, unlocking greater productivity and maximizing the return on marketing investments. By harnessing your data to deliver a richer customer experience and using it along with your MarTech solution to unlock more productivity, you'll be able to improve the ROI on your marketing activities and see benefits for your customers, your marketing team, and your business.

As technology continues to evolve, so do customer expectations. Meeting these expectations through personalized interactions is no longer optional but essential for staying competitive. By embracing a holistic personalization strategy, businesses can achieve sustainable, scalable success, ensuring they remain at the forefront of their industry while delivering exceptional value to their customers.

OSF | DIGITAL

OSF Digital can help you achieve 1:1 personalization at scale through one of our three packages from Fundamentals to Enterprise.

The OSF Digital team can also provide a diagnostic to measure the trust you have across your organization before launching a major transformation.

Contact us to learn more

Thank You

Connect with Us

