A Winning Recipe for Delivering Personalized Experiences

Choosing between manually curating personalization or letting automation do the work for you shouldn't be a difficult decision.
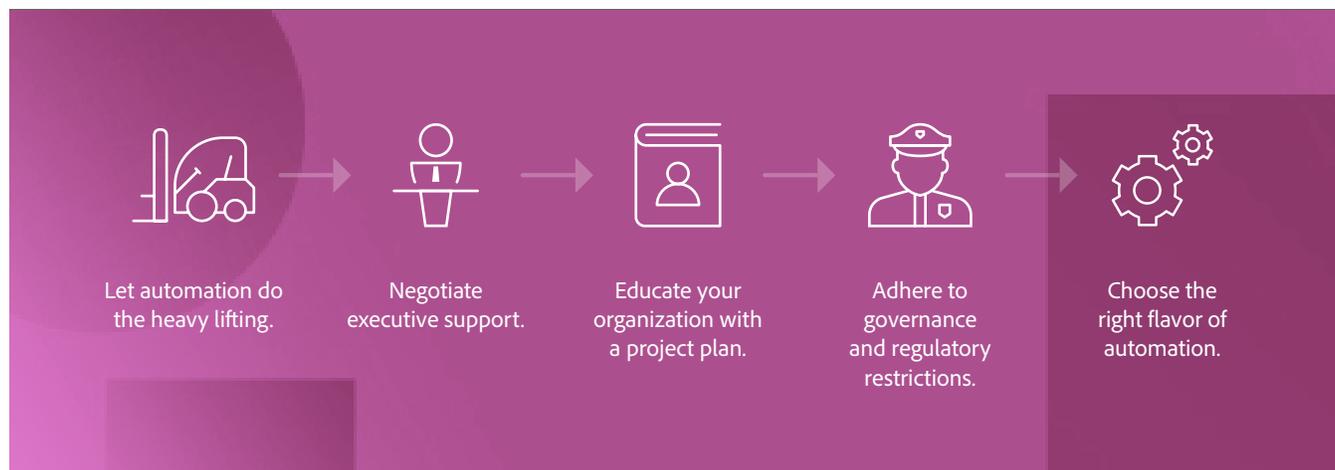
I'm Heather Razukas, and as a consulting manager for Adobe Experience Cloud specializing in optimization, I've seen a vast array of customer tactics for personalization. But one issue remains at the forefront of the conversation—should marketers forfeit control over personalization in favor of automation?

The answer is yes, and no. Like many marketers, you understand that being able to personalize at scale is now a necessity, but you're hesitant to trust automation and machine learning to do the full job for you.

Whether your concerns are over job security, maintaining compliance with regulatory requirements, or seeing a return on your investment, the posed question misses the point. Automating personalization doesn't mean you give up control. It's not a zero-sum game, and an either-or answer to automation isn't the right approach to the personalization issue at all. A better question would be, "how can automation help me improve personalization?"

If you're going to meet the needs, wants, and desires of history's most sophisticated consumers, you'll need to roll up your sleeves and develop a personalization formula that works for your brand. And that will include at least some level of automation—no matter how large or small your organization is.

A winning personalization strategy is a lot like a great recipe—it takes a unique combination of people, processes, and technology to get it just right. Here are five steps you can take right now to begin developing your own formula for relevant, engaging, and highly personalized experiences today:

Let automation do the heavy lifting.   →   Negotiate executive support.   →   Educate your organization with a project plan.   →   Adhere to governance and regulatory restrictions.   →   Choose the right flavor of automation.

1. Let automation do the heavy lifting.

Many of the customers I work with are personalizing landing pages for visitors that come through links from paid search campaigns. The marketers typically begin by targeting specific customer segments to ensure they're showing the right ads to the right people at the right time. This helps campaigns direct the best content to visitors searching for those keyword types.

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If you're personalizing a page, you also have to gather data on performance, analyze that data to decide what's performing best, and finally, implement changes to regularly optimize your personalization strategy. It's not an ineffective targeting method, but it's undoubtedly time consuming when done manually. On the other hand, automating the process allows you to analyze trends as they are happening. Personalization technology can use that real-time data to automatically and continuously optimize campaigns with machine learning algorithms.

The other heavy lifting that can be accomplished with automation is the delivery of personalized experiences at scale. Automation makes decisions faster and more efficiently than you're able to do on your own—and that's a good thing. It can offload tedious work that would otherwise be impossible to scale, freeing you up to think more about creativity, brand engagement, or the fundamental experiences you are trying to drive.

I personally saw one brand improve marketing ROI by introducing automated targeting as a split test with some of their older, tried-and-true processes. They found that automation had a much stronger impact on customer engagement than manual processes did, leading to a 7 percent increase in revenue per visitor, as well as an almost 6 percent boost in conversion rates when compared to business as usual. You, too, can see the impact automation could have on your targeting strategies by implementing split testing against your current processes.

2. Negotiate executive support.

One thing I've learned during our customer engagements is that regardless of the method customers use to deliver personalization, without executive buy-in, projects rarely get off the ground.

Delivering highly personalized experiences isn't an isolated project—it spans many aspects of the user journey. Therefore, projects to enhance personalization require buy-in from multiple stakeholders across marketing, as well as those who have influence throughout the organization.

When you're meeting with potential stakeholders, have a clear plan to back up an organization-wide approach to your strategy. Conduct a test or perform a proof of concept to get your executive sponsor on board. Then, continue to show ROI so they understand exactly what they're getting in return for their support.

Once you've designated a sponsor, an effective way to keep the momentum is through a value creation story. This is typically an article or white paper that details resources consumed and the outcomes they've generated, and is designed to help prove your concept to the organization. Value creation stories are persuasive tools that give executive sponsors the confidence they need to continue championing your program to key stakeholders across the organization.

3. Educate your organization with a project plan.

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We already know automation is not designed to take the place of the marketer. Rather, it's something that can be used in concert with the strategies you design for personalization. But, surprisingly enough, I've found that many companies are still reluctant to embrace any form of automation.

This is where organizational enablement comes in. It's your responsibility to make sure your organization receives the right education, so they understand exactly what they're committing to. A clear project plan that focuses on costs, potential revenue, and how every department benefits is paramount.

Enablement doesn't just cover value, either. Another crucial point to machine learning that I mentioned earlier is scale—the benefits of which must be fully understood by all parties involved. By teaching your teams about automation, you'll take the angst out of the decision-making process. I've spoken to countless marketers who were reluctant to trade a certain level of control for automation, but after a little education, most realized that the benefits of machine learning far outweigh any shortcomings.

4. Adhere to governance and regulatory restrictions.

Some organizations I work with have strict regulatory requirements—especially those in the financial services and healthcare industries—necessitating extra steps and precautions when launching automated content strategies.

Automation can not only help you serve the best content, but it also can ensure that you only deliver the information and offers that different customer segments are eligible to receive. Use technology features to limit the use of specific assets, and to define appropriate content for each audience. You can also set up alerts to ensure compliance with copyrights or other content with expiration dates.

Having a central team create automated rules that are globally applied ensures that your marketing messages are compliant—and can put executives' minds at ease.

5. Choose the right flavor of automation.

It's not a matter of whether or not you should be using automation, rather, it's about how much automation is right for your brand. What may work for a Fortune 500 company may be overkill for a startup. That's why it's important to consider what you're trying to accomplish through automation—along with your level of personalization experience—before nailing down a strategy that works for you.

Brands can whip up automated personalization strategies ranging from a basic rules-based recipe to a multi-faceted artificial intelligence formula that would put the world's most renowned master marketers to shame. If you're new to personalization, don't be afraid to start small. Incorporate A/B testing into the mix, and go from there. After all, it's okay to stir in automation one ingredient at a time.

I should also note that while automation can relieve a lot of the effort expended on your part, it still needs you to make it work. I've had customers who mistakenly believed that automation would take away their entire workload with the click of a mouse, but that simply isn't the case. Automated processes and machine learning still need marketers to drive and own the process—they will not replace you.

With the right recipe for personalization, there's no limit to how far your business can go.

To go deeper and find instructions and details on deployment recommendations for all of the technology described in this use case, visit the link below.

https://helpx.adobe.com/support/campaign.html

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