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How to create personalized web experiences

Your step-by-step guide

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Why personalization matters

Personalization is not a new concept, yet most marketers are still figuring
out how to use it effectively. Personalizing content for shopping experiences
was recently listed as the top content challenge that companies expect to
face when integrating content and commerce[1].

Now is the right time for you to personalize, because you have the tools to
create more relevant digital experiences for your customers. Let's get
started and see how you can use personalization tools. Your most simple and
effective weapon is right before you — your CMS.

What exactly is personalization?

Personalization lets you adapt content to your visitors according to their age,
location and personal preferences. It allows you to serve the right
content to the right people at the right time.

Personalization is about building relationships
with visitors and providing them with relevant
and engaging content. If you give visitors tailored
content, you'll stand a better chance of turning
them into customers or winning repeat
business.

Why do you need to personalize now?

With the right tools, you can use simple personalization to power up the
effectiveness of your website and cross-channel marketing programs, no
matter how large your organization or what your business does. Even if your
resources are limited, you'll often find that basic web personalization can
give you a higher return on investment (ROI) than other, more traditional,
marketing programs[2]. So goodbye mass marketing that sends the exact
same mailing to thousands, hello personalization.

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Basic web personalization can give you a higher return on investment (ROI) than other, more traditional, marketing programs.

Many content management systems carry personalization features that allow you to target content to visitors by channel, device, location, date, demographics, past behavior and preference. And there is a wealth of data about visitors and customers — sometimes even too much, such that the challenge becomes that of analyzing and making sense of the data to reach customers in meaningful ways.

Personalization is not new. In a physical store, say, a supermarket, you might check out some fresh meat at the payment counter and then receive a discount coupon for barbecue sauces. That's personalization at a basic level.

Right now, the push to personalization is stronger, as it becomes mainstream. The tools for doing this are now widely available.
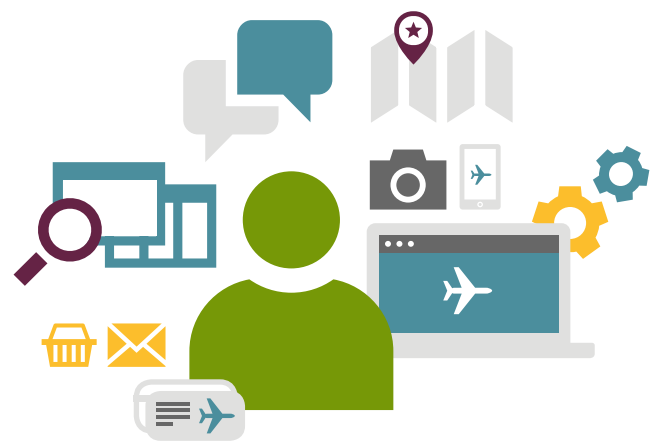
The benefits

How Alior Bank used personalization to boost online sales

Poland-based Alior Bank used personalized web content and ads to provide visitors with relevant information to fit their needs. Statistical tools allow Alior Bank to verify user journeys, find out which pages are visited the most often, and then optimize content and introduce new sales solutions. As a result, its online loan sales increased by 42% and accounts grew by 24%. It also increased mortgage loans by 188%.

42%
Increase on online sales loans

24%
More accounts

188%
Increase of mortgage loans

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How Ticino Tourism used personas to create multichannel experiences

Ticino.ch, a tourism portal for the Italian-speaking region of Switzerland, introduced a homepage that is personalized with different content depending on the user's current geographical location and language selection. By identifying personas and dividing tourists into three segments (residents, day-tourists and medium-to-long term distance tourists), ticino.ch was able to give different visitors relevant information and tailored digital experiences.
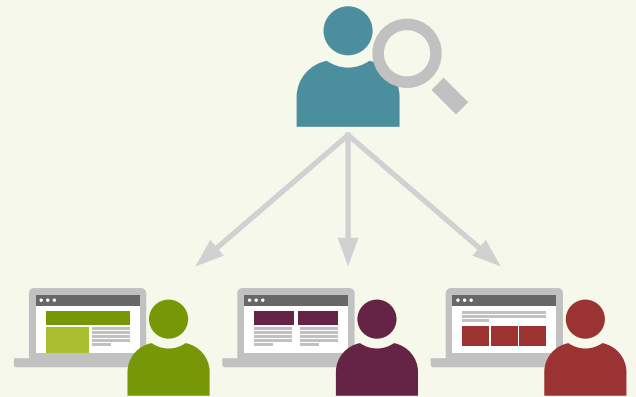
Why personalize?

5 to 8 times

Personalization can deliver five to eight times the return on investment (ROI) on marketing spend and lift sales 10% and more[2].

88%

of consumers are more likely to shop with retailers that deliver personalized and connected cross-channel experiences[3].

42%

Calls to action on personalized websites perform 42% better than on generic websites[4].

20%

Gartner predicts that by 2018, organizations that have fully invested in all types of personalization will outsell those that have not by 20%[5].

Is everyone doing it?

92%

of CMOs believe that personalized experiences will drive value, shorten sales cycles and deepen affinity[6].

More than 50%

Yet more than 50% of CMOs struggle to personalize content in real time due to lack of resources, time or knowledge[7].

75%

In Forrester's Q1 2016 Digital Experience Delivery Online Survey, 75% of respondents said that they are personalizing web content[8].

60%

of those who are personalizing experiences reported that the content management system is the top technology[8].

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Getting started

Personalization is not rocket science, but it does demand some serious
thinking about what you want to achieve and how to use the tools. Keep it
simple and avoid complex scenarios at the start. Let's use an example from
the travel and tourism industry to see how this might work.

Consider your goals and objectives. Do you
actually need personalization? Can you segment
your audience in meaningful ways? You could for
instance target budget-conscious travellers or
those who go for luxury and high-end choices.
Don't slice your audience too thin, as your goals
could become too fragmented, with no clear
targets to meet.

Cathy Xu

Think like people, create personas
A good way to start is to create personas that are
relevant to your business. A persona is a fictional
visitor who represents the audience you want to
target.

Describe the persona in a short paragraph that
explains their behavior, needs and goals. Add a
few fictional personal details to make the
persona a realistic character.

For example, Cathy Xu is a Chinese female aged
29, speaks English, is an avid mobile user, and a
budget-conscious traveller.
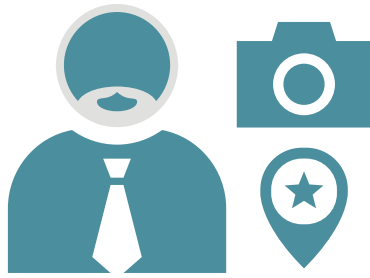
Massimo Ossi

Massimo Ossi is a male management executive in his 50s, geographically mobile, interested in music and photography, and with a penchant for unusual, high-end tours.

May Clifton

May Clifton is a mother of two in her 40s, based in the US, who often accesses the site in the evening, and searches for family-friendly holidays in the region.

What traits describe your personas, and can you group them together?
A trait is a characteristic of the persona that you can describe and capture. Some traits commonly used for personalization are: age, gender, interests, date of visit, location of visit, language set in browser. "New vs. returning visitor" is a useful trait because the distinction is clear and it applies to every visitor.

Magnolia provides four default traits out of the box:

- **Date:** Allows you to serve content based on the current date. For example, run a Valentine's Day campaign the week before February 14.

- **Country:** Allows you to target visitors from a particular country. For example, show tour prices in pounds to UK visitors.

- **Visitor:** Allows you to detect if a visitor is new, registered or logged in. For example, greet a logged-in visitor by their name.

- **Cookie:** Allows you to detect browser cookies and compare their values to traits. For example, show a weather forecast for the holiday destination the user searched for.

... and many more when connected to your CRM system.

Get to know your visitors: ask, track, segment
Focus on your audience and not just your business goals. You can ask visitors explicitly about traits such as age, gender and language. These traits can be collected when visitors fill in a form and create a user profile.

You can also implicitly track visitors as they navigate the site. The user profile is built over time as the visitor clicks links and views pages, e.g. how long they stay on a page, what are their favorite pages.

When you know your audience well enough, group them into segments. For example, you can group visitors coming from the Americas region and serve content relevant to them. Your segments or audience groups should ideally be large enough to be measured, stable over time, and reachable in clear ways. Another example of a target group for our travel example could be "shutterbugs", i.e. those with interests including photography and having a Flickr account. You could identify them through the social media channel that they came from before hitting your

site, or the interests that they ticked on your search form.

Don't forget that business might be easier with existing customers than new customers, who could cost five times more to acquire. Try up-selling to your core segments, e.g. if your high-end customers have booked a beach villa holiday, ask them if they wish to book a personal cook as well. In the US, 40% of revenue comes from returning or repeat purchases, who represent only 8% of all visitors[9].

Forrester in the US estimates that 40% of revenue comes from returning or repeat purchases.

Scale your content

Now that you know who your customers are, model content to fit them. You might be concerned about how you can scale personalization. On the one hand, content needs to be tailored. Consumers expect content to be relevant to them as individuals, not segments. The mobile age has given rise to so-called "audiences of one". On the other hand, content needs to be reusable.

Remember that you don't necessarily have to produce more content, but you do have to use available content in better targeted ways. Think of personalization as a problem not of content creation, but content management.

How you can package content better

Many CMS vendors offer solutions to help you with this. Key concepts behind a lot of those solutions are modular content and tagging.

Create content in bite-size pieces rather than huge chunks. Produce content in reusable blocks that can be reconfigured to meet personalized needs. This is the idea of content pools, where content is not created on pages, but is the sum of smaller pools of structured content elements that can be reused on different platforms and channels, and can be presented in different ways. Play around with these content nuggets to delight your customers.

How does the system know what content to show which customer segment? This is where tags come in. You may have lots of relevant content on your site, but you also have to mark or categorize this content to make it easy to find and reuse. Choose tags to match desired attributes or keywords. For instance, you could build content on tours to Kyoto or Kathmandu. You could then tag these with a range of attributes such as "ecotourism", "off-the-beaten-path", "outdoors", "cultural", "singles" or "family".

Vary content in pages and components

As you create content in modules, you will have original elements and variants of these. A variant is simply an alternative content element that is adapted or edited to best suit the intended audience. This then replaces the original element when personalized content is delivered.

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Magnolia offers page and component personalization. Being able to change parts of pages or entire pages allows you to build personalized experiences in simple, scalable ways.

You can create page variants in a tour carousel to cater to visitors landing on your travel site. You can assign audiences to these content variants by segments or traits. You could create ad-hoc traits, but more likely, you could also get these from your CRM system. To go back to the three personas we created, you could segment these audiences by geographical region to show relevant tours close to them. For example, May Clifton from the Americas might see tours in Alaska and the Rocky Mountains, and Cathy Xu from Asia might see tours in Kyoto and Malaysia. You can also preview the page as the persona May or Cathy to view the different options that are offered to each segment.

ALASKA   KYOTO

May Clifton   Cathy Xu
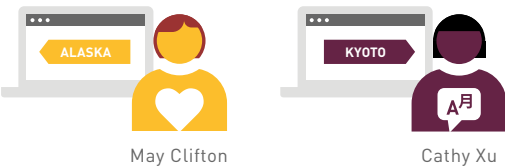
In another example, you could use component variants to show relevant information on the contacts page. An anonymous visitor would see all the contact details of the travel agencies from each geographical region, but May from the Americas, or Cathy from Asia, would only see the travel agency contact details and opening times from their specific region.

Create a marketing model to keep your content relevant

Devise campaigns to reach your target segments. Campaigns can be thought of as a set of rules that work together to create an experience. Rules push relevant content to the front and filter irrelevant content out. Rules can be based on any trait that you can reliably detect and analyze, such as profile attributes, preferences, past behavior, search terms, or interests.

The HubSpot inbound marketing model is an oft-cited example of a campaign[10]. At each stage of the customer journey, you can personalize content to meet the needs and goals of the customer. As a result, content becomes more and more focused and relevant to the visitor.

ATTRACT
Social media
Referral-specific content

CONVERT
Call-to-action
Forms
Downloads

CLOSE
Personalized e-mails

DEAR MASSIMO

DELIGHT
Relevant content
Thoughtful ideas

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PAGES

Search

Page	Title	Template
travel	Travel Home	Travel Hom
tour-type	Tour Types	TourType C
destination	Destinations	Destination
tour	Tour detail	Tour Detail
about	About	Travel Star
contact	Contact	Travel Star
Variants (3)	—	—
contact : Americas	Contact	Travel Star
contact : Asia-Pacific	Contact	Travel Star
contact : Europe, Middle East & Africa	Contact	Travel Star

MASSIMO OSSI

Age: 50
Gender: male
Interests: music and/or photography
Date of visit: after winter season and
before Easter
Location of visit = Europe

Let's use the earlier persona — Massimo Ossi —
to run a marketing campaign that targets
high-end customers for the summer holidays.
We can build a set of rules around his known
traits, e.g.:

Here are some examples for how personalization
can help at each stage:

• **Attract:** Acknowledge and greet Massimo as he
  comes to the travel site from your social media
  posts. Try serving some referral-specific
  content, e.g. "Hi hobby photographer!"

• **Convert:** Create a personalized call-to-action at
  the end of a travel blog post, e.g. download tips
  for stress-free travel.

• **Close:** Use the first name of the visitor in an
  e-mail to boost the click-through rate to a
  special tour package, e.g. "Dear Massimo, our
  quiet beach bungalows are the perfect haven to
  work, rest and relax as you want."

• **Delight:** Personalize content for returning
  customers, e.g. if you know that Massimo has
  booked a certain tour, include content about
  local events or festivals around the tour dates,
  i.e. he might like to attend the open-air
  classical concert in the village square.

Personalizing based on behavior
Personalization based on what visitors do on a
site can be a very powerful tool. Let's see how all
these work in an example of variants in a
behavior-based scenario. Your travel site can
build on the visitor's preferences to feature the

tour type known. The original component asks
visitors what type of tour they are interested in:
active, cultural or off-the-beaten-path. Massimo
might have indicated his preferred tour as
"cultural".

ACTIVE
✓ CULTURAL
OFF-THE-BEATEN-PATH

You can then create variant components to show
various tours depending on the theme that
visitors select. For Massimo, this might be a
Scottish weekend tour in Edinburgh or a guided
trekking week in Kathmandu. Don't forget that
you can also create and serve an empty variant
to hide the original component once the visitor's
preference is known. When Massimo returns, he
doesn't have to answer the same question. He is
no longer an anonymous visitor and you can
start to engage him as a customer.

The system adds Massimo's search terms into a
cookie and stores these preferences to develop a
picture of his travel interests over time. When
Massimo visits again, you could show tours
based on his preference. For instance, if
Massimo has searched on the term "Bahamas"
holiday before, when he returns, you could show
some hotels or feature suggested cruises in the
region.
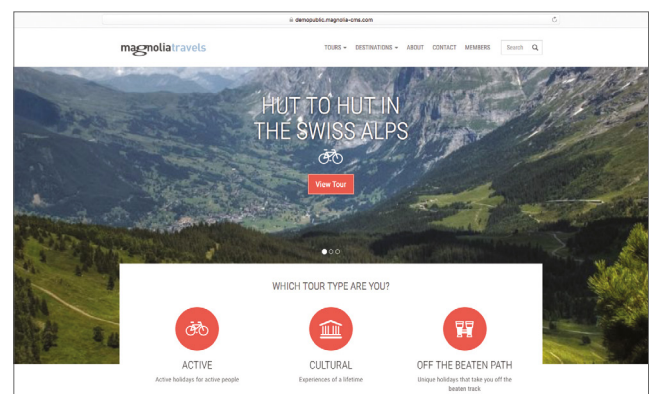
Magnolia allows you to preview the visitor's experience. You can check that the redundant content is now hidden for specific personas and show them exclusive content. Over time, you might notice that visitors are searching for particular terms. That could well be a signal to you to create relevant content and serve that variant to them. The benefit of using Magnolia for personalization is that it is flexible. You can build on it and take it where you want to go.

Track and test
It's important to personalize, but it's equally important to be able to measure and track progress through testing and analytics. Set your key performance indicators (KPIs). Start by monitoring and segmenting traffic on your current site. One useful tool is A/B testing with

Google Analytics. If you notice that a particular tour is not being called up, you can decide to drop it and focus on something more promising.

Magnolia's personalization tools are designed to work with visitor and customer data from other systems such as analytics and CRM. In addition, readily available connectors for popular systems such as Salesforce and SugarCRM make it easy to optimize your personalization.

Roll out your campaigns progressively and avoid big bang approaches. Fine-tune your business strategy and technological infrastructure over time. Use the technology to help you to listen to and get to know your customers first. Then use it to help deliver the content and services that they want. Never stop testing, because audiences change over time.

Three ways to better personalization

Thoughtful remembrance
Marketers usually aim to create compelling content that engages audiences. Yet customers do not necessarily want to be "engaged". When you book a flight with an airline, you might well receive your automated e-ticket with a call to book your hotel or rental car. But you don't really want or need these, so you ignore these extras. When you later check in for the flight, you get an automated confirmation with another call to book your hotel or rental car. But you still don't want these. Maybe what you really want are directions from the airport into the city, or information on the local sights and tours.

So engagement is not repetition; it is about "thoughtful remembrance", to use Dan Stasiewski's term[11]. The airline probably knows the date of your return flight. A couple of days into your stay, wouldn't it be nice if you got some restaurant tips or a call to book a reasonable taxi service to the airport? Engagement means not just replicating the experience but

amplifying it. It is about thinking as a person what you would wish for yourself and converting that to something tangible.
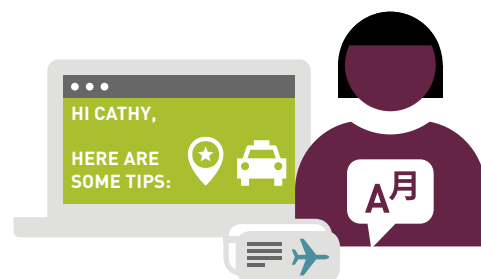
Map out the touch points
Look at your customer journey, which is often not linear, and map it out. It is estimated that consumers will visit a site nine times before making a purchase. Also, the buying cycle has lengthened significantly as consumers compare prices across different retailers, comparison sites and reviews[12]. To go back to the travel example, the persona May Clifton could have done a Google search on a tablet about "off-the-beaten-path" tours before landing on your site. You can personalize the content that she sees,

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maybe focusing on suggested itineraries, or a travel blog with someone's experiences, or a signup alert for special offers.

If you capture May's contact data, you could a few weeks later send her a mobile alert about a travel talk that someone might be giving in her vicinity. That personal contact might then lead her back to her desktop to complete her booking and payment for the tour.

About 50% of e-commerce transactions are now cross-device[13], meaning that consumers use multiple devices to access sites prior to purchase. The task for marketing professionals is not just to convert consumers on a linear mobile journey, but to better understand cross-channel behavior so that they catch consumers at key points and ensure that sales are closed.

Criteo estimates that about 50% of e-commerce transactions are now cross-device.

Respect privacy, provide value

In all this, remember that personalization relies on consumers' willingness to provide personal data. If personalization gets too personal, it could backfire. Winning user trust is critical. Ensure that you have policies and processes in place for permissions and data protection, all legally compliant within the regions that you operate in. Consumers are sensitive to privacy concerns, but are generally willing to provide some personal data, provided that they see some real benefits and you give them something of value.

Personalize now

The time is right to get into personalization. If you are struggling to implement your strategy, take comfort that the competition is probably not far off. Start with straightforward scenarios that you can gradually develop and refine. Take on a customer profile and ask yourself, what would I like to see served up if I were in his or her place? Keep it simple, relevant and thoughtful. Go for software and tools that will allow you flexibility to build on your technical requirements and to integrate with your existing business systems.

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About Magnolia

Magnolia is a digital business platform with a CMS at its core. Enterprises such as Airbus Group, Al Arabiya, Avis and Virgin America use it as the central hub for their web, mobile and IoT initiatives.

Magnolia's unique open suite approach allows you to go to market fast, adapt quickly to changing business priorities and integrate easily with Commerce and other third-party systems. This enables them to create outstanding multi-channel customer experiences while maintaining central control over all content assets.

Magnolia CMS ranks on top position in the prestigious Emerce best 100 companies in e-businesses 2018, commercial CMS category.

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About Info.nl

Info.nl has been a certified Benelux partner of Magnolia since 2008. Next to that for numerous years we have been listed in the EMERCE Top 100 Best digital agencies in The Netherlands.

We craft digital products that people love to use. We enjoy working with forward thinking companies actively looking for the next step forward. Our self-driven teams serve as agile product development partners, enabling our clients to use new techniques and injecting a different way of thinking into their business process. We offer expertise in the core disciplines of agile product development and digital transformation.

It is this passion that drives every unique project we complete, no matter how large or small. Our successful history includes clients such as Greenwheels, BVA Auctions, T-Mobile, Graydon, Adyen and many others.

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