



Personalization in Practice



Starting a personalization program in six steps

About uPersonal and Basic Orange

Basic Orange knows the digital landscape is everchanging. Twenty-five years ago we started out as an online CD store. Growing and adapting to the new digital age - and with our development skills more in demand than our CDs - the online store turned into an online web agency. We built customized CMSs, but schooled ourselves into becoming experts in the open source CMS Umbraco when our clients wished for more flexibility. And as it became evident to both us and our clients that good websites require continuous work, we developed programs for website optimization, defining customer journeys and personas.

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So yes, we understand that nothing is more changeable than the needs of your customers.

In 2017, Basic Orange founder Maarten Dirksen heard of a package that just might be the answer for this. He bought the package (named 'Spindocor' back then) and optimized it. In 2019 we launched uPersonal: the on-site realtime personalization package for Umbraco.

However, we know that you need more than just a tool to make personalization work. Of all marketing executives who start personalizing, only 12 percent feel completely satisfied with their efforts (Evergage, 2018). Often they lack the right people or the know-how to achieve the desired results. A well-thought out approach can make a world of difference. In this whitepaper we therefore share our best practices for an effective personalization strategy.

Who should read this whitepaper?

This whitepaper is meant for everyone who wants to make headway in personalizing their website to improve usability and to meet conversion goals. Please note that uPersonal is specifically aimed at the personalization of Umbraco websites.

For **entrepreneurs and managers**



[What is online personalization? \(page 4\)](#)

For **marketing executives**



[Step-by-step action plan \(page 6-9\)](#)

For **Umbraco developers**



[Technical specifications \(page 12\)](#)



This whitepaper will tell you:

- Why you need to start personalizing now
- The prerequisites for personalization
- How to start personalizing
- The next steps
- How you can personalize in Umbraco
- How the uPersonal package works

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“Personalization is not a trend, it’s a marketing tsunami”

Larry Light
Forbes Magazine

1. What is online personalization?

Without even thinking about it, we personalize all of our social interactions. We greet our neighbor John by his first name, the bartender remembers what we were drinking and we say things at home that we would not say at work. Online personalization uses these techniques in an online environment. Instead of showing all of your visitors the same website, online personalization makes it possible to adjust a website to the specific person using it. Visitors no longer see one standard message, but a tailored message that is relevant to them at that particular moment. Just like in real life, this helps us to build better and more personal relationships.

Why should we personalize?



In this age that floods us with information every day, being relevant is crucial. Personalization guides your visitors in their journey through your website and tailors website content to their individual needs. This eliminates distractions and helps you turn visitors into customers. With the right tools, personalization can significantly increase customer satisfaction and conversion rates, and amplify the effects of your marketing activities both on your own website and through other channels. Personalization is not just a way of increasing revenue. Studies by Monetate (2017) and Salesforce (2018) show considerable improvements throughout the entire customer journey: from brand building to generating leads and customer loyalty.



87%

of companies that use personalization report a measurable increase in operating results.

- Evergage (2018)



5-8 times

Personalization can deliver five to eight times the return on investment on marketing spend and lift sales by 10% or more.

- The Economist (2013)



30%

Companies that invest in online personalization sell up to 30% more than companies that do not invest.

- Sailthru (2017)



88%

of marketers think their customers do not only deserve personalization, they expect it too.

- Evergage (2018)



74%

of consumers feel frustrated when they see content that is not relevant to them.

- Infosys (2016)



79%

of consumers is fine with sharing data if it means they get relevant content in return.

- Salesforce (2018)

2. Why on-site real-time personalization?

Personalization comes in all shapes and sizes, from email segmentation to fully integrated data management platforms. Real-time on-site personalization, the name says it all, focusses on the needs and behaviors exhibited by the customers who are visiting your website at the very moment.

Your website's content will change real-time based on clickstream data and a fixed set of rules. This is also called 'behavioral targeting'. Other live visitor data can be used too, such as referral URL's or clicked paid search links and their keywords. This combination of features allows you to discern very specific users.

Start fast

There is no one-size-fits-all best approach of personalizing. What is best depends on the goals you have set for your website. That being said, on-site personalization is an innovative and manageable way to quickly start up your personalization program.

Many organizations get tangled up in the endless possibilities of personalization and their different data management platforms. Overwhelmed by the size of the task ahead of them, they give up halfway through or never even start. So try not to make things too difficult for yourself at the start.

This is the right time

Developing one homepage, one website is outdated. Online personalization is not just the next step for companies who want to increase their website's efficiency – customers too deserve and have come to expect a personalized experience. This does not mean you have to personalize at the levels of Amazon or Booking.com. One well-aimed modification of your website can already lead to a more positive customer experience. Start small, learn and build on your learnings.

Happy personalizing!

"Our website's content sliders change based on customer behavior. Thanks to this personalization, we have seen that our visitors are quicker to convert on our website."



Roos Slot

*Online Content Manager for
Cool Theater*

Learn fast

Focus on small personalizations that could generate the most impact and that you could start using tomorrow. The longer you wait, the less you learn. You can always expand later.

Moreover, on-site real-time personalization provides you with reliable data on your visitors' behavior. This can be used later if you choose to take your personalization efforts beyond your website. Where better to start than in the moment of truth: the moment your potential customer is actually on your website.



3. Step-by-step action plan

1. Goals & Data



Out of all personalization tactics, 63 percent of marketers think data-driven personalization is the most difficult to accomplish (Ascend2, 2017). Sometimes personalization tools are installed without knowing which problem they should be solving and without the personalization data being analyzed. And that's a shame.

Setting goals is essential, but often forgotten. Of all companies that meet or exceed their revenue goals, 79 percent had documented clear goals and personalization strategies (Monetate, 2017). Personalization itself should not be the goal: it is important to know exactly which growth objectives you aim to achieve with the personalization. Is your goal that customers order more products? Should they read more of your articles? Or do you want them to feel happier about their visit to your website?

Everything starts with data

The first step in starting with personalization is a data analysis of the present situation. This should show you what your greatest business challenge is at the moment.

Where are you losing your visitors? Is there a leak? Could online personalization help you to plug the leak? Ask yourself where personalization could make the biggest impact on your business goals and start from there. Keep it simple. The start-up world's lean growth methods are well suited for personalizing: start small, learn from what you do and scale up the things that work. Do not forget to think about how you are going to measure the impact of the personalizations you have implemented.

Check your data

If you are not doing this yet, this first step is the best moment to start collecting data and to confirm it is the right data. You will need this data not only to help set your goals, but throughout the entire process. Make sure you have installed Google Analytics or another analyzing tool and check it thoroughly. Have you set up your conversion goals? Have you filtered out bots and traffic from your own office? Have you checked the setup for your referring traffic?



To be able to personalize, you have to know who your users are and how they come to your website. It is likely your data analysis will already provide you with some insights. On the other hand knowing who your users are will also play an important part in setting your goals. It is therefore likely that the first two steps of this action plan will go hand in hand.

Personas

Defining personas can help to clarify and visualize who you are personalizing for. A persona is a fictional visitor

who represents one of the audiences you are trying to reach. They help you think from the perspective of your visitor.

Bring them to life

To create a persona, you will need as much information as possible on your target audiences. Try to make your personas as lively as possible. Do not limit them to their characteristics and demographic data, but also try to consider your persona's goals and challenges. Which tasks is your persona trying to fulfil on your website?

2. Personas & Customer Journeys

What information is this person looking for? What are their difficulties in this process? What would be a positive result for your persona in performing this task? What frustrates them? Which customer needs could you respond to?

Customer journeys and content needs

In a customer journey you map all the stages of the journey your customer makes: from the first acquaintance to becoming a brand ambassador. How

does a customer feel/act/think in these different stages? Which device are they using? What information are they looking for at this stage? What type of content could help your customer progress in their journey?

There are several useful frameworks for creating customer journeys. A popular example is the See/Think/Do/Care model, which was developed by Google.



*Are you ready to create your personas and customer journeys?
Visit basicorange.nl/personas to get our free templates.*

3. Recognition & Definition



Now that you have mapped your goals, personas and customer journeys, it is time to find out how these audiences could be recognized on your website and which content elements could be personalized for them. If you have made the definite decision to start personalizing, this would be a good time to implement the necessary software so that you can start immediately.

Distinguishing customer segments

Go through the pages on your website with the different customer journeys in mind and score the pages for certain distinctive features that could indicate if you are dealing with different customer segments. What do you know about the visitors on your website at this point that could be used to distinguish between personas? Do they live in certain locations? Which websites referred them to your site? Which search terms did they use?

Finding the right elements

Next, go through your relevant landing pages and make a list of website elements that could be personalized for your different personas (always with your goals in mind). Are there any items you could sort according to how relevant they are for your personas? Which pages/widgets/texts/images/buttons do you want to show Persona A, but hide for Persona B? For instance: you could show different visitors a different photo on your homepage or highlight different USPs in your texts for different types of customers.

Helpful tip: You will often quickly achieve higher conversion by hiding irrelevant, distracting content below the page fold or by decreasing its visual importance in another way.



4. Hypotheses & Priorities

Although maybe you have already used some of your data, up till now many of your personalization ideas will be based on assumptions. In the last step you have identified which content elements could be personalized for which personas. Now is the time to write hypotheses for these ideas, so they can be properly tested and assessed.

Example

"If I can recognize [Persona] on [a certain webpage] and offer them a personalized [piece of content], I expect them to [convert ...x better] than a visitor who does not see a personalized page."

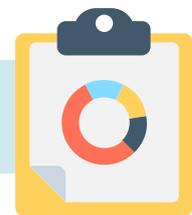
Prioritizing

Because your time and resources are limited, you will not be able to test all hypotheses straight away. You will therefore have to find a way to prioritize them. Which will you test first? Here are some questions to help you decide: How hard or easy will it be to create this personalization? How much will it cost? Which personas deserve the most attention? Which personalizations do you expect to have the biggest effects?

Go to basicorange.nl/personalization-testcard to get a free template for personalization hypotheses.



5. Executing & Testing



Make sure your hypothesis is sound and well-documented before you start your test. This will make it easier to draw conclusions later on. Define a clear metric to help you assess if a personalization is sufficiently effective in reaching your goals. For example: the amount of clicks on an element, sales, average time spent on a page, customer satisfaction scores from a survey etc.

Designing the test

A/B testing (also known as a 'split testing') will often be a good method. With this type of testing you can show half your visitors the personalized element you are experimenting with.

The other half will see an unpersonalized page. You will also have to think about the duration of the test and statistical significance. How many visitors need to have seen the test in order to get a reliable result? However, not everything that counts can be counted, and not everything that can be counted counts. For websites with lower traffic too, it is definitely possible to run insightful tests.

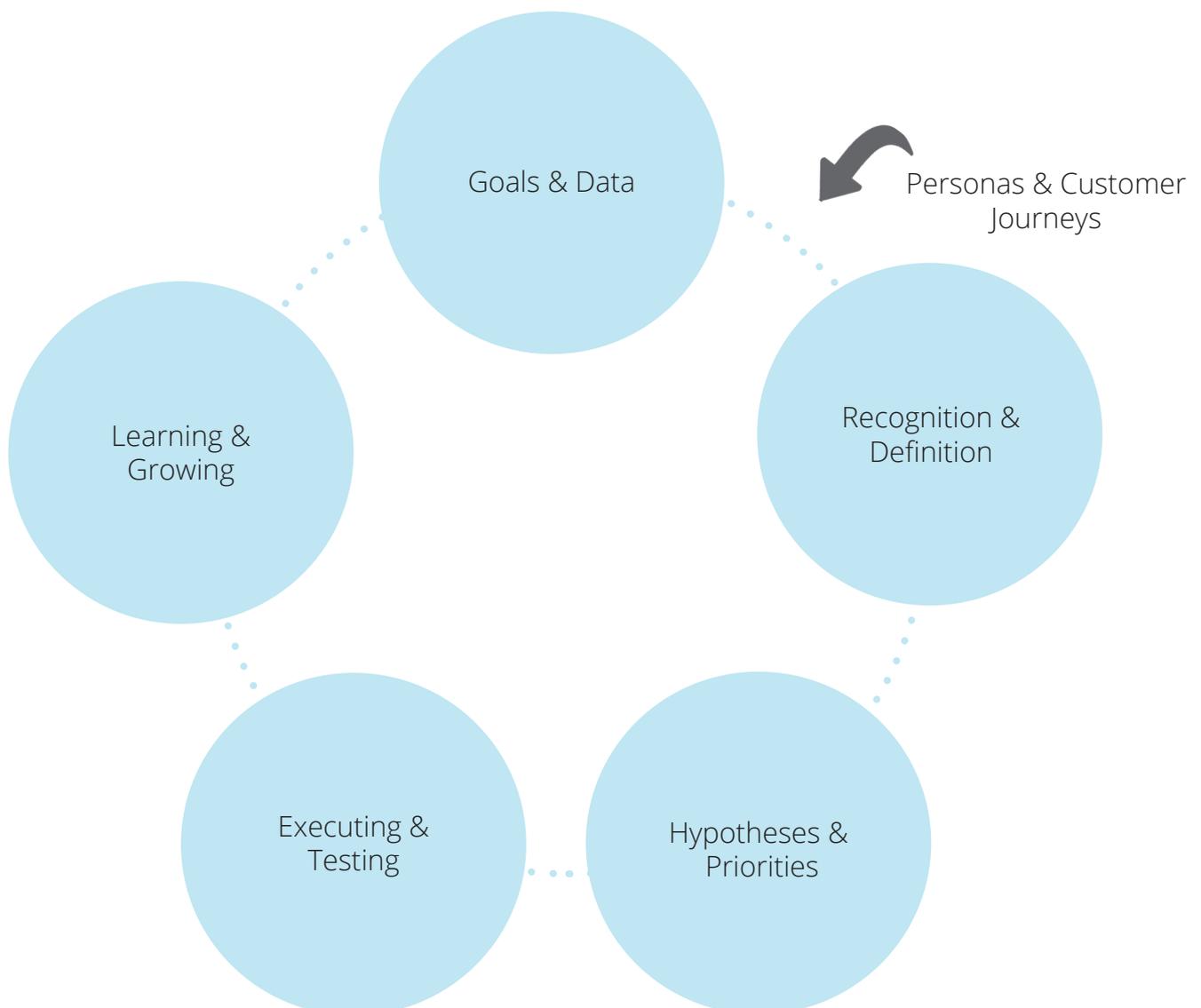
There are several good A/B testing tools out there, some of which are free, like Google Optimize. An advantage of this tool is its native integration with Google Analytics, which makes it easy to analyze test results.

Congratulations, you have just created and tested your first personalization. Did you meet your goals? If you did: excellent. How could you scale up what you have just found? If you did not: what could have caused this? Maybe this was not exactly what your visitor needed? Maybe the texts or designs were not persuasive enough yet? Could and should you adapt the personalization to reach your goals, or is it time for a new experiment?

Building on

Document your findings well, so you can build on what you have already achieved in the future.

Be sure to share them openly, so everyone is involved and part of creating an innovative culture of testing. Together you will gain new knowledge, learn from your mistakes and celebrate successes. When your on-site personalizations are doing well, you can start thinking about personalizing and utilizing more channels. This way, step by step, you will build towards a better and more relevant dialogue with your visitor and of course, towards your goals.



4. Examples

When a visitor has interacted with the website long enough to be sorted into visitor profile, show them the specific **header image** that matches their profile.

Has a visitor clicked on a **paid link** with a **search term** that belongs to a campaign for a certain **region**? You can now show them more region-specific deals.



“What can we help you with tonight?” Sometimes all you have to do is ask. Provide your visitor with a quick options menu to base your personalizations on their **choices**.

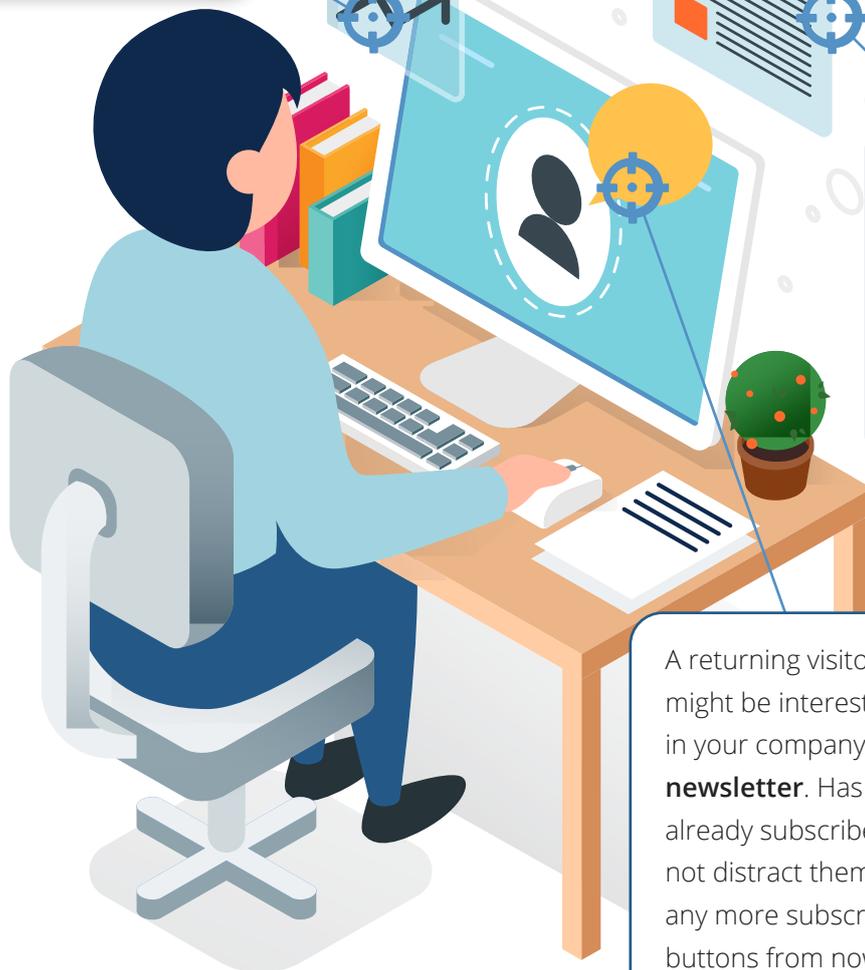
Did a visitor find your website through a certain search engine and did they land on a page about a specific topic? This gives you a clear indication of their intent on your website and the content youv might want to show them next.

What is this particular visitor looking for? Do they respond better to 'the latest trends' or to 'the best deals'? Use what you know to emphasize the **USP** (Unique Selling Proposition) that is most likely to convince at this stage.

Has a visitor found your website through YouTube? They might prefer **video content** to other content. If you have any videos, be sure to show them.

Which **news items or events** are especially relevant for this visitor? Sort your posts according to what this visitor is most interested in.

A returning visitor? They might be interested in your company **newsletter**. Has a visitor already subscribed? Do not distract them with any more subscribe buttons from now on.



5. Technical specifications

Visitor profile

Online personalization will make your website adapt itself to different visitor profiles. These profiles are composed through your visitors' clickstream data and their behavior on your website. The profiles consist of *segments and attributes*.

Segments (showing targeted content)

Online personalization allows you to show targeted content to targeted audiences. For example, you could show specific texts, images or call to actions to specific users. You can decide whether a content element is relevant for a certain visitor profile and if you want it to be visible or invisible.

A visitor will be added to a segment if or when a certain trigger is set off. This trigger activates or deactivates the segment. Segments are therefore quite static, but do offer a high degree of certainty.

An example: a visitor lands on your 'careers' landing page through a search engine. This visitor is probably looking for a job. After the visitor has clicked through your website for a while, you could remind them of their goal by emphasizing the 'careers' page in a personalized menu or with a special 'apply now' or 'we are hiring' pop-up button.

Attributes (sorting content elements)

As we have seen segments are set for a longer period of

time. Attributes however, are constantly changing. Think of how streaming platforms like Netflix, Spotify and YouTube are remarkably skilled at predicting what we would like to watch or listen to next. They make accurate recommendations. The personalization package allows you to do the same on your website.

Pages on your website will be given a score between 0 and 100 for certain attributes. When a visitor visits a certain page, that page's attribute score will be added to the total score for this attribute that is already present in the visitor's profile. If a page has been given a low score for a certain attribute, the visitor's total score for this attribute will drop. This way, the visitor's profile changes according to their current preferences and their real-time click behavior.

A simple example would be the website of a theater. Here the genres of the different plays and performances make for logical attributes. A visitor who mainly clicks on comedy shows, will gain a high score for the attribute of 'comedy'. As a result this visitor will be shown more comedy shows at the top of the list of events. Attributes therefore allow you to sort content on your website in a dynamic way. This is especially valuable for websites that offer large amounts of content, since it makes it easier for visitors to find the information they are looking for amidst all the content that might be less relevant for them.

Triggers

Triggers are the mechanisms that change a visitor's profile and fire the corresponding personalizations. After some instruction, content editors too will be able to set these triggers, making it possible to quickly make alterations or implement new personalizations in the CMS. Some available triggers are:

Attributes	Executing code or adding a visitor to a segment after a certain attribute score has been reached.
Visits	Previous site visits or visits to certain pages of the site.
Search terms	Which Google paid search term brought this visitor to your website?
Referral URLs	Which website led this visitor to your website? (e.g. a search engine, a price comparison website, a certain blogpost).
Location	Based on IP addresses.
Platform	Windows, Mac, iOS, Android etc.
Browser	Chrome, Firefox, Internet Explorer etc.
Facebook	Age, gender etc.

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About uPersonal

Would you like to learn more about the uPersonal package after having read this whitepaper? We would love to tell you all about it. uPersonal works with a license subscription. The subscriptions are flexible and based on the amount of profiles you use. Feel free to contact Maarten for a free demo.



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About Basic Orange

The uPersonal package is property of digital agency Basic Orange. Need help with strategically implementing online personalization in your organization? Go to basicorange.nl for our free persona and test hypotheses templates or give us a call. We would love to update you on the latest developments in online personalization and what these can mean for your company or organization.

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