



# Fast-Track Your Organization's Ability to Deliver Personalized Experiences

Leverage the data that's generated from  
assembling experiences



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Summary and Takeaways



# 69%

of consumers said they're more likely to purchase from a brand that personalizes experiences

Powerful personalization pays off. **Deloitte** found that 69% of consumers said they're more likely to purchase from a brand that personalizes experiences and 68% said personalization boosts brand satisfaction significantly.

**Our own research** has revealed that while marketers view gathering first-party data as more important than ever, consumers are feeling increasingly comfortable about sharing personal information with brands to receive a better experience. Each personalized experience is a value exchange between a brand and consumer. It requires the right balance of content, data, and trust management to make the value exchange work.

But, oh the frustration in making it happen.

While both organizations and consumers see the value in personalized experiences, many marketers still struggle to get personalization right. That's not surprising: It's not easy to target audiences on a one-to-one basis with relevant content at the right time and on the right channels.

Fortunately, with the right toolkit and strategy, achieving personalization at scale doesn't need to be such an exasperating challenge.



# Why Do So Many Organizations Fail With Personalization?



**A handful of significant challenges commonly prevent teams from delivering exceptional personalized experiences. These barriers include:**



**Integrating data from multiple sources is complex and time-consuming.**

It's hard to understand what data is needed and how much. Having too little data makes it difficult to deliver a good customer experience, but having too much data extends the process.



**Manual audience segmentation can be tricky to accomplish.**

You need to have a good understanding of how an audience wants to engage with you – even over multiple channels – and how this impacts an effective marketing funnel. It's a lengthy process that requires constant monitoring and refinement.

Potentially valuable customers can fall through the cracks, which will negatively impact the return of your media and content investments. Ultimately, manual audience segmentation can translate into inaccurate customer segmentation.



**Developing a data strategy to power effective campaigns can be messy and complicated.**

Organizations often need people with multiple skill sets to collaborate effectively and answer questions like: Do we understand our audience enough to build a segmentation strategy? Do we have enough data to support our campaign planning? And, how do we measure success?

The complexity creates business risks for media spend, content creation, and brand perception due to poor customer experiences.



**Tuning your content strategy to drive personalized experiences requires a critical mass and a variety of structured content.**

Marketers must have a wealth of high-quality and relevant stage- and persona-based content. This content must be organized, tagged, and integrated, but getting to this point requires the right strategy, systems, and process.



**Optimizing campaigns manually has many downsides.**

The optimization cycle for experiences is time-consuming and requires multiple teams to work together effectively. Operational costs are high, and so are the risks.



**Many organizations don't have in-house expertise.**

There's a tendency to underestimate the cross-functional skills needed to build and maintain great customer experiences. In addition to a lack of training, employees often don't have the bandwidth to take ownership of key technologies.

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**These combined challenges can have a direct impact on your competitive advantage since creating and maintaining personalized experiences requires more time and resources.**



# Solutions That Can Help Drive Personalization

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What's notable is that technology isn't typically a pain point. Many tools that can help marketers move forward with personalization aren't generally hard to use and can integrate with content management systems (CMSs), like Drupal.

These include:

- ◆ **A customer data platform (CDP)**
- ◆ **A digital asset management (DAM) system**
- ◆ **A personalization engine**

A **CDP** makes personalized customer experiences possible by unifying data from a broad array of sources in real time to create a single view of the customer. So, rather than storing various bits of customer data across several solutions, you can gain a single source of truth about your audiences. This record is trustworthy since a CDP standardizes, validates, stitches, and deduplicates the data. The tool also makes it easier to comply with data privacy regulations. CDPs that utilize artificial intelligence or machine learning can understand the desires and preferences of millions of individuals at the level required to personalize content.





**89%**

**of marketers say their  
organization's CDP utilizes  
artificial intelligence or  
machine learning**



A **DAM system** serves as a bridge between marketing and IT by simplifying how content is organized, accessed, and delivered across digital experiences. It gives teams centralized, self-serve access to images, videos, logos, graphics, documents, and templates that are searchable and ready to deploy across multiple channels.

A **personalization engine** enables marketers to collect behavioral information about what visitors are doing in real time, like when they click on a product description about a yellow mountain bike, for instance, or watch a video about how a mountain bike differs from a road bike.

These kinds of insights can help you shift visitors from an

“anonymous” status, in which you have too little knowledge to create segmentation, to a “known” status. While you may not know who a visitor is yet and data is still scarce, you have enough insights to create segments based on behaviors.

You can provide a curated experience that resonates with someone who has shown interest in yellow mountain bikes, for example.

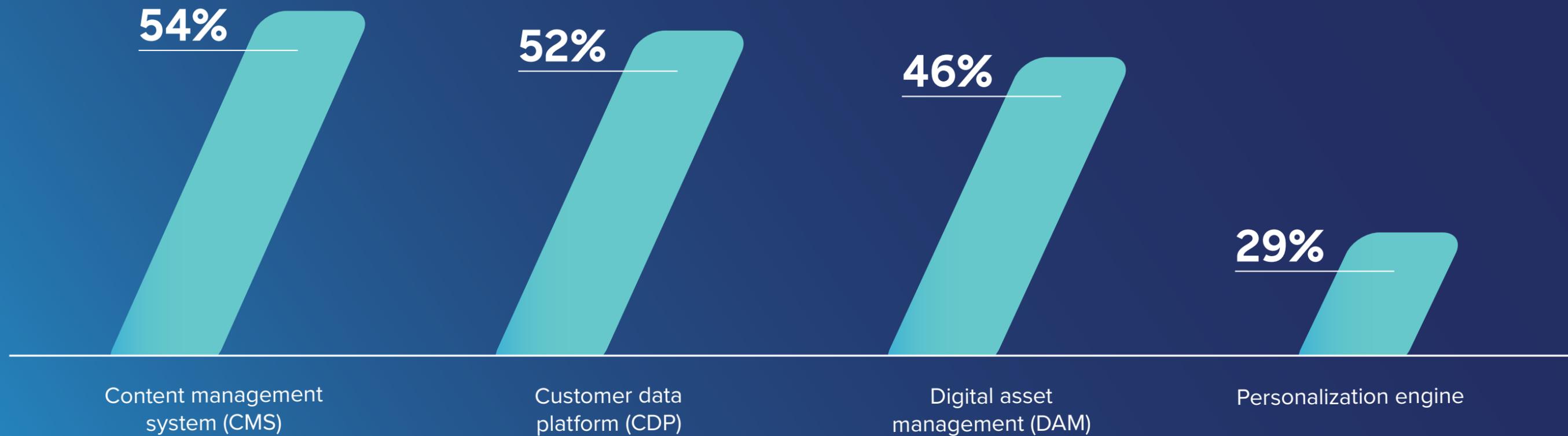
Here's an easy way to think about these tools: While a CDP is the source for customer data and a DAM is the source for digital content, a personalization engine delivers the right content to the right audience based on the visitor's behavior and preferences.

# Marketers Are Recognizing the Value of CMSs, CDPs, DAMs, and Personalization Engines

Our most recent CX Trends Report asked marketers: What digital marketing or customer experience tools has your organization adopted in the last 18 months?



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Source: "Create Engaging Customer Experiences. Launch Faster. CX Trends Report," Acquia, September 2022 <https://www.acquia.com/customer-experience-trend-report>

# Optimizing Personalization with Metadata Insights



# The Three Phases of Customer Engagement



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Marketers can typically sort audiences into three categories based on how much they know and understand about them. Leveraging data-related insights can help teams build the audience context necessary to provide improved customer experiences.



To take personalization to the next level you need a higher degree of understanding. When you can build a customer profile about individuals that includes “lookalike” interactions and behaviors, you can create true segmentation. Your segments can help you predict the “next best step,” build personalized campaign paths, and initiate multi-touch campaigns.

An automated experience activation solution that leverages a CDP, CMS, DAM, and personalization engine together can help you reach this more advanced stage of insight. How?

**The act of building an experience generates accurate contextual data that you can use to drive personalization.**

Think about it: You meticulously define the context of the pages you create in your CMS — as a product page for yellow mountain bikes, for instance, or an article about how to plan a group ride with friends.

The taxonomy, which is native to Drupal, and content keywords can be used to categorize the specific interests of audiences that interact with the content. You don't need to manually retag

your page to derive context from those interactions.

The photos, illustrations, videos, and other assets you add to your DAM have context as well. An asset is already categorized in the structure of the DAM when you use it on a webpage or in an email. The same concepts apply to assets in your product information management (PIM) software that you may use for e-commerce.

In other words, CMSs, DAMs, and PIMs create metadata, which is data that provides information about other data. All the content you need to categorize your audience is present in the assets you use, and each interaction with that content strengthens the relationship between the assets and behavior.

Machine learning models within the CDP can ingest the metadata and dynamically create customer segments that can be activated in real time across any channel. The segments created are accurate and impactful because they're derived from metadata that is reliable, first-party data.

For example, you can gain intelligence about customers who have shown interest in yellow mountain bikes and have a high likelihood to make a purchase. In addition, based on how audiences interact with biking-related articles, you can learn who fits into the categories of “weekend hobbyist cyclist,” “fitness lifestyle,” and “sociable.”

Meanwhile, if a customer identifies themselves through any form capture – like to schedule a time to test out a bike – you can take all of the anonymous data you have and associate it with a specific customer. Any subsequent interactions can be appended to their record.



# Overcoming Barriers to Delivering Personalization



## The unified solution can help you achieve the following business impacts:



### **Remove the development cost of manual integration.**

Leveraging data that is created in the CMS and DAM (and PIM when required) means you can achieve audience categorization without laborious integration work. As with any data source you connect with a CDP, introducing CRM data or transactional data will still require specific integration work, however.



### **Reduce operational cost and complexity with automated customer segmentation.**

You no longer need a manual optimization cycle because, after some setup time, the process of categorizing and prioritizing audiences is effectively automated. Categorization is data-driven and standardized rather than built on assumptions. You'll reduce the risk of missing unpredictable audience behavior, and your data can be used for activation on any channel.

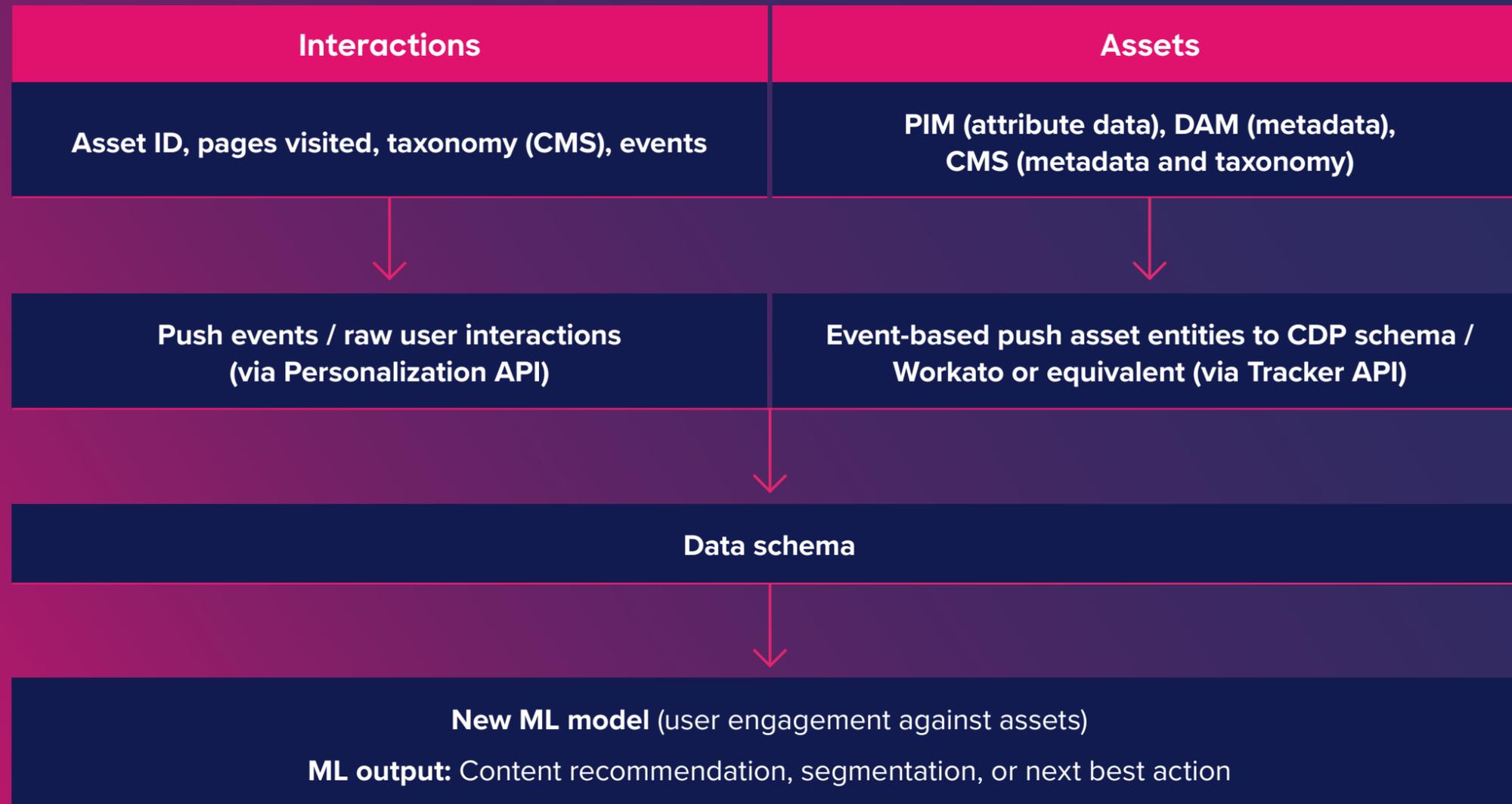


### **Increase customer lifetime value with machine learning activation across the customer lifecycle.**

Machine learning doesn't only reduce the cost and effort of both analytics and campaign management. It also enables you to categorize your audience accurately and automatically to provide the best possible customer experience at the right time and on the right channel. To boost your conversions, you can also use predictive models, such as the likelihood to buy today.

# High-Level Architecture for Automated Experience Activation

Here's how leveraging metadata within the Drupal CMS and Acquia solutions can streamline and expedite your personalization efforts.



You can map CMS, DAM, and PIM field-level data into a format that allows machine learning models to automatically segment customers as a rich first-party data source.

The session data and customer data are stored in a unified Snowflake data layer, which allows for powerful federated queries across data sets.



# How a National Mortgage Lender Scaled Up Their Personalization Efforts



Academy Mortgage Corporation has embarked on a journey to use a single, data-driven view of each customer to deliver highly personalized messages.

The national mortgage lender isn't only focusing on personalization at scale for customers. It's also driving personalization for the 700 to 1,000 loan officers across its 200 branches who sell its product.

These loan officers need experiences and websites that reflect their markets and who they are, which is why Academy's small team is building and supporting hundreds of websites that maintain consistency with the corporate-level experience.





In addition, since many of Academy's loan officers sell through affinity programs that may be related to a church or a hospital, the team builds personalization at the affinity level. They also create campaigns at scale across the ecosystem that are customized for both customers and loan officers.

Academy conducted a three-month test campaign where they created social posts, digital ads, and landing pages for 20 loan officers that were personalized based on what the company knew about the customer and the loan officer.

Those loan officers, who represented 5% of the loan officers participating in the campaign, created 25% of the funded loans. It was a remarkable achievement given that the company only needed to close 10 loans to break even but closed about 600 loans.

**Inspired by that success, Academy turned to Acquia solutions to forge ahead with personalization at scale and other digital transformation efforts.**



# Summary and Takeaways

## Combine Powerful Technologies to Build Personalized Experiences Quicker and With Fewer Resources

The idea that metadata from experience building can be a secret sauce for personalization when it's fed into machine learning models is a fresh take. It's been easy to overlook the fact that pages and assets offer context that can be good indicators of consumer interest and can advance individuals through the unknown to known and then understood stages of engagement.

But clearly, collectively leveraging machine learning insight from the source assets used to create the experience can help you remove the barriers to delivering highly personalized experiences — without nearly as much reliance on in-house data science expertise.

An automated experience activation solution enables you to:

- ◆ **Reduce the cost and complexity of data integrations**
- ◆ **Use asset metadata to drive personalized experiences**
- ◆ **Lower operational overhead by powering audience segmentation with a CDP's machine learning capabilities**
- ◆ **Decrease the risk of failure by automating segmentation**
- ◆ **Increase customer lifetime value (LTV) with machine learning audience activation**

- ◆ **Reduce media spend by leveraging high-quality owned data for business decisions**

What's more, once the solution is in place, machine learning will constantly enrich the mapping and context between your content and user interactions, so as more people use the experience, the better it gets.

Ultimately, combining these powerful technologies can provide you with the insights you need to finally deliver the personalized experiences that will delight your customers and prospects and strengthen their brand loyalty.



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# Learn How Your Organization Can Fast-Track Its Personalization Goals

[Request a Demo](#)



# Acquia

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## About Acquia

Acquia empowers the world's most ambitious brands to create digital customer experiences that matter.

With open source Drupal at its core, the Acquia Digital Experience Platform (DXP) enables marketers, developers, and IT operations teams at thousands of global organizations to rapidly compose and deploy digital products and services that engage customers, enhance conversions, and help businesses stand out.

