



———— MASTERING THE ART OF ————
Omni-Channel Personalization



Table of Contents

1. Introducing Personalization	p. 3
2. The Mechanics of Personalization	p. 4
3. Gathering Data	p. 6
4. Connecting the Dots	p. 12
5. Guiding the Buyer's Journey	p. 15
6. Conclusion	p. 21

CHAPTER 1: Introducing Personalization

Why Personalize?

Let's start with some stats. 56% of consumers are more likely to shop with retailers who personalize their online experience, and seeing content that doesn't match their interests frustrates 74% of consumers.¹

Consumer dissatisfaction aside, this has a real impact on your revenue, as 61% of consumers feel better about a company that delivers custom content, and are thus more likely to buy.² And, on average, there's a 20% average increase in sales for marketers who personalize their web experiences.³ **As a merchant selling online, this is critical to your success.**

Personalization matters to your bottom line. You should be demonstrating that you're building this relationship to your customers. You need to leverage the data you have to gain insight, and then bring that insight together with a central data source to guide your personalization efforts. Finally, you need to execute on that data and actually work to guide the buyer's journey. Then reap the rewards!

What Is Omni-Channel?

You might think omni-channel is just a corporate buzzword. While it is buzzy, here's its formal definition: **understanding who you're communicating with across channels (website, emails, social, apps, call center, stores, ads, etc.) and then connecting those channels to give individuals what they want.**

Omni-channel goes a step further than multi-channel marketing. With omni-channel, the focus is on delivering a seamless and consistent experience across channels and factoring in the different devices in these channels that consumers are using to interact with your business.

- 1 Business2Community
- 2 Demand Metric
- 3 Monetate

CHAPTER 2: The Mechanics of Personalization

There are two primary types of information you need to collect to be successful in your personalization strategy, anonymous and personal. Collecting this information will help you deliver a personalized experience across your website and beyond. By aggregating this data and using it to power marketing automation, you can personalize the experience of buyers (and potential buyers!) to make them more likely to purchase.

Anonymous Information:

Anonymous information is information you can glean from a visit to your website, without tying it to an individual visitor. Collecting this information can help as you start to build an early-stage relationship with your visitors. It includes:

- **Channel and Device:** Channels that brought a visitor to website, device used to access the website
- **Onsite Behavior:** Pages visited, time spent on each page, click and scroll information
- **Demographic Information:** Location information, IP information

Even without having more in-depth information on your visitors, you can start to personalize their experience with your website using this anonymous information alone.

For Example:



Device: Optimize your website by device type



Pages Visited: Visitors were also interested in product recommendations based on product pages visited



Location: Change shipping information based on location

CHAPTER 2: The Mechanics of Personalization

Personal Information:

Personal information is tied to a specific individual in your database. As you develop your relationship with your visitors, you can increasingly personalize their experience with your brand to make sure it's tailored to their interests. You can base it off of your pre-transactional conversions and the purchase history of your customers. It can include:

- **Contact Details:** Name, email, phone, address
- **Job Specific Information:** Job title, department
- **Past Purchase Information:** Items purchased, amount spent, lifetime value

With this increased amount of information about your buyers, you can take your personalization strategy to the next level by making their experience unique through automation.

For Example:



Past Purchase Details: Solicit a review after your customer has started using your product



Past Purchase Date: Send a reorder marketing email based on purchase date



Past Purchase Item: Upsell and cross-sell based on previous purchases

CHAPTER 3:

Gathering Data

Now that we've identified some of the data needed for personalization, let's talk about how to gather it. There are several sources of data that we'll draw on specifically here for your strategy – your personas, your conversions, and your products. Essentially, you need to know **who you're serving, what they want to engage with, and what they love to buy**.

1. Personas

Personas are fundamental to your personalization strategy. They're how you know who you're marketing to, and what they care about!



A **persona** is a semi-fictional representation of your ideal customer, based on market research and real information about your existing customers. Buyer personas incorporate customer demographics, behavior patterns, motivations, and goals.

The best way to understand your personas? Talk to your customers – they're the real-life incarnation! As an ecommerce business you don't necessarily have the opportunity to interact with your customers face-to-face. However, you can draw on the expertise of people who interact with your customers every day, like customer service and sales representatives. You can also do this through social monitoring and website behavior.

The question to answer with persona research is **who do you serve and why?** On the simplest level, that's who your personas are. You need to focus on these core personas to stay true to the focus of your company and brand. As you develop your personalization strategy, this is what will drive it. For all of your product or website changes, you should be asking: how does this serve your persona?

CHAPTER 3:

Gathering Data

Questions to Answer While Developing Your Personas:

- What persona is most profitable for you?
- What persona is easiest to attract and retain?
- What persona do you have the most content for?
- What persona have you built out the best nurturing campaigns for?
- What persona is converting most on your site, and what is their path?

Because your entire team is involved in working with your customers, everyone across the business needs to be onboard with your persona development and personalization strategy. Now that you have this soft data on your personas, you need to combine it with the harder data to make the personalization truly effective across channels.

2. Conversions

Now that you've identified your personas and who you're currently engaging with, it's time to focus on conversions. Here, you're trying to identify what those personas want to engage with on your site that isn't just the Add to Cart button.

The simple question to answer is: **what is your highest converting presale offer?** If it is a newsletter, coupon, or general popover, you aren't providing value for your personas. The goals of newsletters, coupons, and general popovers are not targeted to meet the needs of your personas, they're targeted to meet your own needs. It's easy to ask people to join your newsletter or give them a coupon. But that isn't delivering value.

You need to have a pre-transactional conversion strategy (not sure what this is? [Learn about it here](#)) to make the most of the 98% of first time visitors who don't convert. Start by building this relationship, and then deepen it through personalization.

CHAPTER 3: Gathering Data

The best marketing feels like a service, which is where personalization comes into your conversion strategy. There are two primary ways to make marketing feel more like a service:

1. Help your potential customers do something better
2. Give your potential customers something to talk about

1. Help Your Potential Customers Do Something Better



Sharing your expertise with your potential customers to help them do something better is one of the easiest ways to make your marketing feel like a service.

This seasonal guide for decorating your home for fall helps people who download it with their seasonal interior design needs. Put together by Linda MacDougald Design and Postcard from Paris, a full service interior design firm and home furnishing boutique, it shares tips to help prospective customers become experts, too.

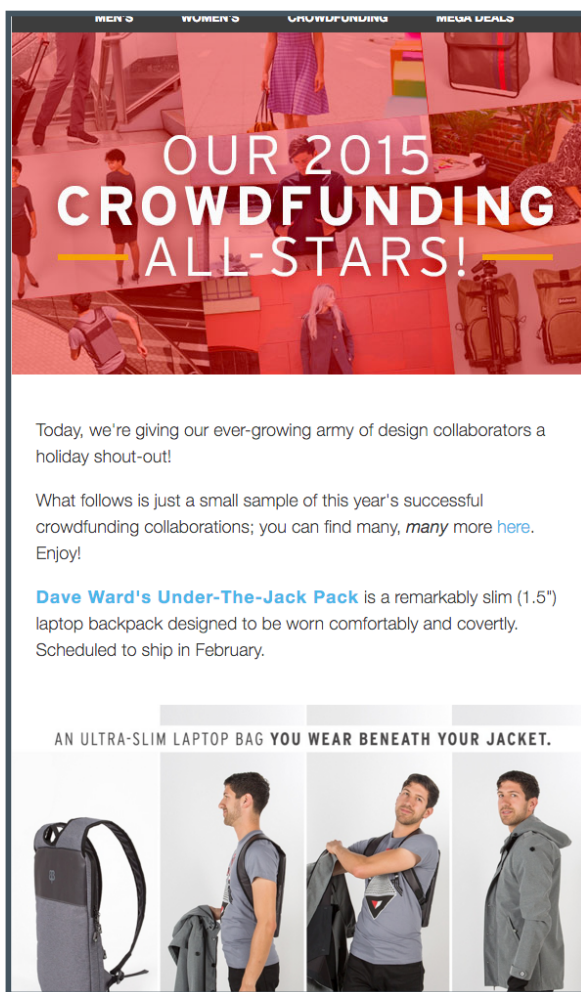
For Your Own Company:

What kind of offers could help your product enthusiasts use your product better? How can you help them master your product? How can you be part of their world?

CHAPTER 3: Gathering Data

2. Give Your Potential Customers Something to Talk About

This is as simple as giving shoppers a cultural touch point to share.



Betabrand is a clothing brand that takes a crowdfunding approach to fashion. Potential customers can join their newsletter to be part of the crowdfunding community.

By letting these potential buyers into the community, they get to feel ownership over the Betabrand products when they are successfully crowdfunded, and share that cultural touch point with their personal networks.

By truly understanding what their personas would share with their networks, Betabrand has maximized the possibility of word of mouth marketing.

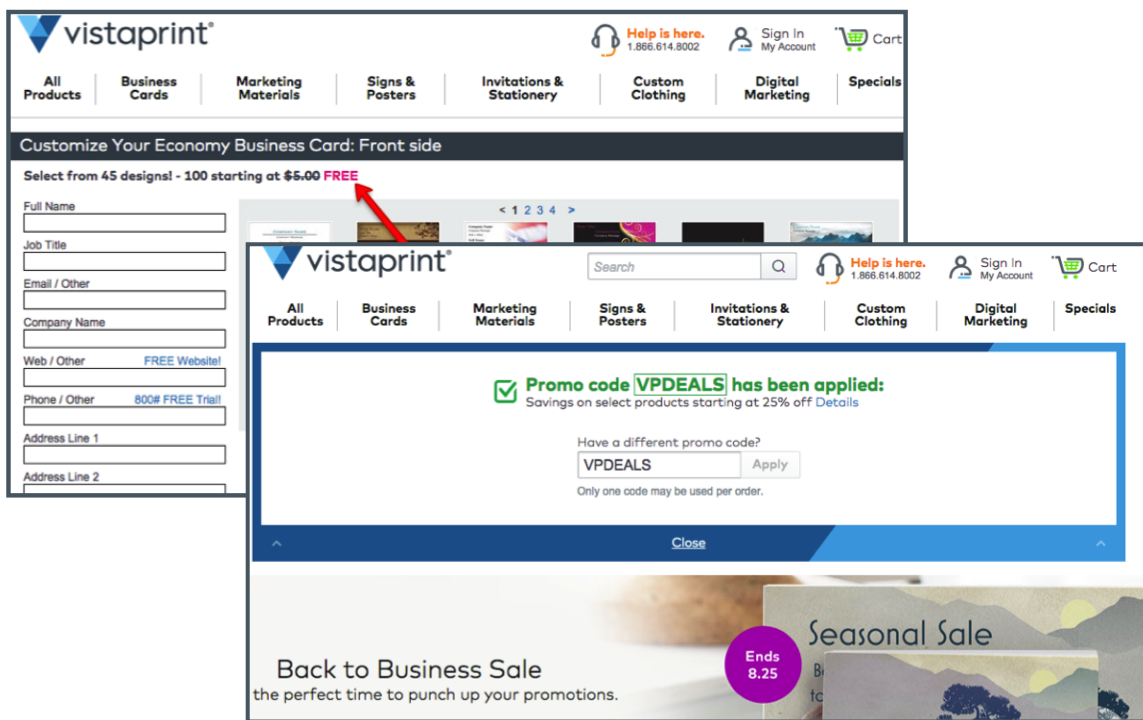
For Your Own Company:

What appeals to your personas? How can you engage with them and give them ownership over your products to share with their networks?

CHAPTER 3: Gathering Data

3. Products

Once you've identified your ideal customers and what they want to engage with, you need to identify what they love to buy. The question to answer here is: **what is your irresistible product?**

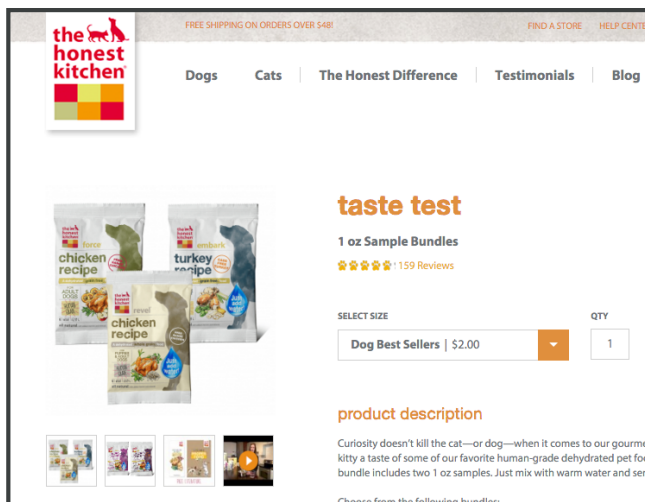


Vistaprint:

Vistaprint's irresistible product offer used to be 100 free business cards. Over the years, their strategy has evolved. Instead of 100 business cards for free, now they're emphasizing 25% off your first order. It seems likely that they realized that their most profitable customer was not the one who redeemed the free business card offer, but customers who were willing to purchase from Vistaprint. So their marketing now guides potential customers towards purchasing at a discount, so they become invested in the Vistaprint product and return.

CHAPTER 3: Gathering Data

The Honest Kitchen:



The Honest Kitchen, a human-grade pet food company, has a popular trial pack offer. They offer a sampler of single servings of their most popular pet foods varieties to test with your dog or cat.

After purchasing the trial pack, you are automatically enrolled in a workflow to nurture you into becoming a loyal customer. Trying the product is the hook they need to the start building that relationship.

By the Time You're Done With Your Product Research, You Want to Be Able to Answer These Questions:

- Which are the best products for a first-time purchaser?
- What item has the highest satisfaction ratings (lowest returns, most reviews, highest ratings)?
- Which product leads to the highest customer LTV?

Takeaway

Identify who you're serving, understand what they want to engage with, then know what they love to buy. Combining this data will enable you to start bringing these individual pieces together to put together an engaging personalization strategy. Your goal here isn't to increase the time on the page. By personalizing your content and strategy, **you're working on decreasing the time to first click.**

CHAPTER 4:

Connecting the Dots

With an omni-channel personalization strategy, you need to gather all of this customer information and connect it. For a seamless marketing and customer experience, you need to connect your:

1. Marketing Software
2. Legacy Systems
3. Human Interactions



1. Marketing Software

You need a central source of customer data to market effectively to consumers across a variety of channels and devices. If you miss the mark, your potential customers will be turned off. Once your marketing system includes full customer data and is a single source for the complete view of the customer, the sky is the limit for how personalized and helpful you can make your marketing.

If your product is consumable, you can send a reorder email at the right time. If your product has accessories and you see that the customer didn't buy those accessories, you can send an upsell or cross-sell offer at the right moment. By building your relationship and increasing your value to the customer, you'll benefit with increased lifetime value and more revenue overall. This returns to the idea of marketing as a service, by providing value to these customers.

CHAPTER 4:

Connecting the Dots

The easiest way to bring these disparate threads together is through existing integrations. By connecting your cart and marketing software, you can nurture abandon carts by pulling through product data, develop post-purchase nurturing workflows, and report completely on lifetime value and most recent purchase. When you can personalize off cart data, you can make magic happen in your emails and on your website.

Beretta is one of the oldest family owned manufacturing businesses in the world. Their warranty database lives online, where it collects registration information from purchasers who bought firearms from a dealer. Since they know who purchased what and where, they can combine the online and offline experiences and remarket, cross-sell, and up-sell accessories to these customers.

2. Legacy Systems

Maybe you have crusty old systems that live behind a firewall that can't automatically integrate with your marketing software. Frequently this is the most critical data to gain access to, especially if it's connected to a brick and mortar POS system. You aren't stuck without insight into this data! With solutions from third party providers, you can pull data from on-premises and sync it to the cloud and your marketing software to retain that critical single customer view.

3. Human Interactions

The easiest human interactions to capture at scale are phone and chat interactions. How are you enabling your customer service or call-center teams on the front line to treat your customers at the end of the line as individuals and not just another case? To strengthen your relationship with these customers, they need to feel valued and like their context is understood. Provide your customer service and call agents with data to give them the context necessary to succeed at delighting your customers. Give them the information at their fingertips with a customer relationship management (CRM) system.

CHAPTER 4:

Connecting the Dots

Looking Into the Future...

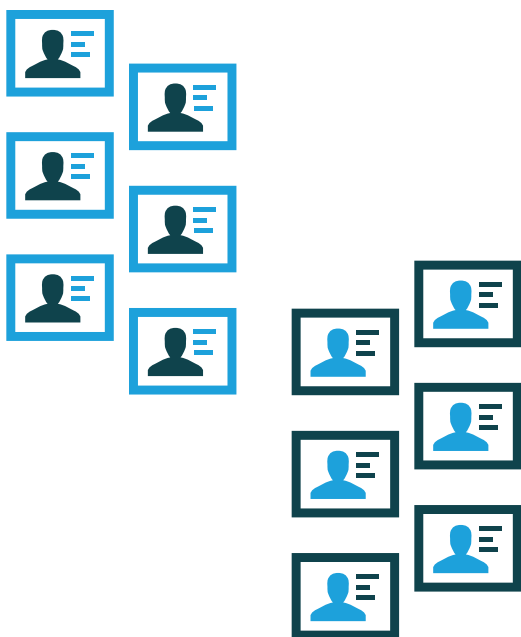
In the future, omni-channel personalization will require more than connecting your marketing platform, legacy systems and human interactions. It will require connecting something broader – the in-person experience to the online experience in real time. Most consumers have smart phones and beacon technology is already starting to come online. With wearables, connected homes, and smart cars, the opportunities for businesses to create an individualized and dynamic relationship with consumers will be larger than ever before. Instead of thinking of these as buying channels, think of them as personalization channels.

Takeaway

You need to determine what system will hold all of this valuable consumer data. With the right tools, you can unite this information with your marketing to provide an experience across all of your touch points with your consumer.

CHAPTER 5: Guiding the Buyer's Journey

The Basics



With this information in one place, you can aggregate the individual level data into lists and segments to deliver personalized omni-channel experiences.

The easiest way to do this is through automation, where you can slice and dice your database based on different characteristics – from their interests to their previous engagement with your brand.

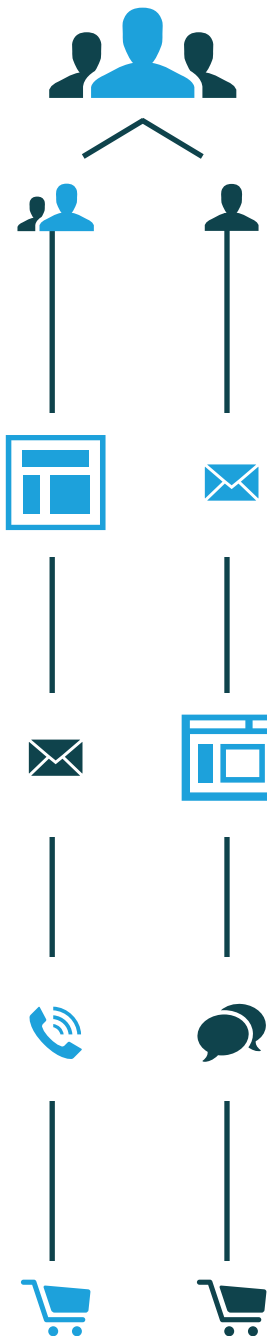
Once you develop these lists, you can use them to power personalization and guide your buyer's journey across your website, email, marketing and social media.

1. Website

In years past, ecommerce companies focused on increasing time on page. It was assumed that time spent on page correlated with engagement with your content. With personalization, this is reversed. Instead of trying to get people to spend a lot of time on your page, **you help them find where they're going and convert as fast as possible.** The new goal is to decrease the time to first click.

This is where onsite personalization and website personalization comes in. You can **guide buyers on their journey and present them a path you want them to follow.**

CHAPTER 5: Guiding the Buyer's Journey



Model the Conversion Path

Draw on what you've learned in the previous chapters about your personas. You know who you're targeting, what they're engaging with, and what products they're likely to buy. Build your conversion path backwards from there.

The first time a customer visits your website, **what do you want them to do?** Do you want them to share their email for a valuable guide you've put together on how to use your product? Or do you want them to try your irresistible product?

Create Content for Your Conversion Points

Once you've determined your conversion path, create the content you need to bring people through it. How do you stand out from Amazon? How do you stand out from big box stores? How do you stand out from your competitors? Content is a critical part of your model conversion paths because it lets people know that they're cared for on an individual level.

Start Updating Your Site to Serve Your Personas

Once you have the path and content created, you need to update your site. More importantly, you need to **measure and test the success of the conversion paths you've developed**. Variation testing is critical at this juncture. Test and tweak your messaging to optimize its performance for your personas. The better your conversion rates, the better you're doing at **building these one-to-one individualized relationships**.

CHAPTER 5: Guiding the Buyer's Journey

Accounting for Referral Traffic

Your conversion paths should account for where your prospective customers are coming from. For referral traffic, you can anonymously personalize your website based off that referral address. You should acknowledge and greet visitors coming a guest blog post you wrote or sponsored content on another site differently than you greet your visitors from other channels. Do you have affiliates or advertising campaigns driving people to your site? Make sure you have calls-to-action to specifically appeal to those personas.



More Than “Just” Responsive

Responsive is only the starting point for optimizing your website for mobile. You also need to address how people are using your website differently on a mobile device. **Are they trying to do something different than when they access your site via a desktop?**

Whatever their goal, you need to send them down the correct path on their journey, whether that’s browsing by category or reading your blog. Offer a different call-to-action to them based on their device type.

Remarketing

It costs a business anywhere from five to ten times more to acquire a new customer than it does to sell to an existing one. Not only that, but on average, current customers spend 67% more than new customers. If you aren’t taking advantage of customer lifetime value through remarketing, you’re missing out on revenue.

You can feature a win back call-to-action on-site. If someone has purchased and returned, but hasn’t purchased in the past six months, give them a special offer to nudge them towards another purchase.

CHAPTER 5: Guiding the Buyer's Journey

Alternatively, you could set up personalization for customers that have a lifetime value over a certain threshold and give them access to free shipping or early access to promotions via website personalization. It's a powerful way to leverage your data to engage with your evangelists and super users.

2. Email

Email communication should always feel as personalized and intimate as possible. This is especially critical in nurturing campaigns.

Moving a Sample Purchase Into a Loyal Customer

The Honest Kitchen has a multi-step nurturing campaign to move people who have purchased sample packs into loyal customers. They've identified that it takes four purchases for their product to become habituated in customers. So they've invested in this nurturing process to ensure that customers don't drop off along the way.

After the first big purchase, they request a review. Beyond engaging with a specific customer and bringing them back the site, it helps drive conversions on the product page from other customers – with a 30% increase on the pages that have reviews on them. The review solicitation is also successful since it's automatically personalized to the purchase history of that particular individual.

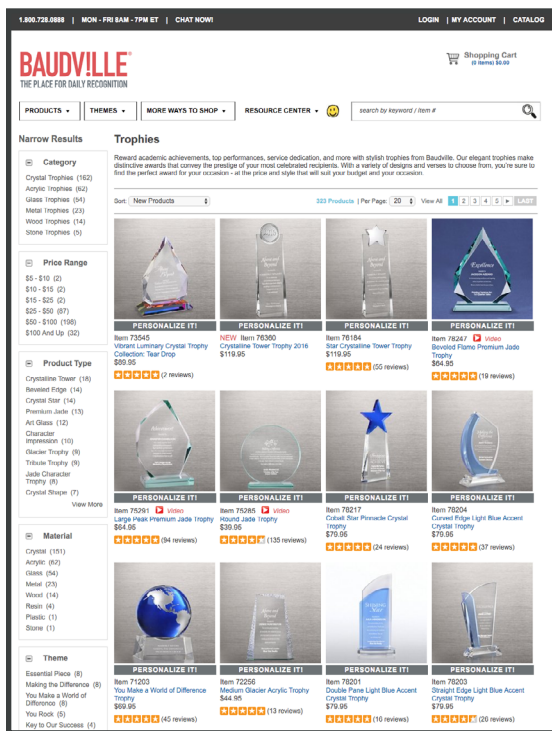
After the second purchase, The Honest Kitchen starts to offer these purchasers membership incentives in the form of rewards points. This incentivizes purchasing, since customers are increasingly offered more value in exchange for their purchases.

By the final purchase in this nurturing series, The Honest Kitchen thanks the customer for being loyal and gives them a special reward point bonus for their purchase. At this point, the relationship is habituated in their customers and they are fully engaged with The Honest Kitchen.

CHAPTER 5: Guiding the Buyer's Journey

Targeting Their “Irresistible” Product

Trophies are the irresistible product at Baudville, a corporate gift and employee recognition company. Trophies have the best margins, best reviews, and the highest customer satisfaction.



Knowing this, Baudville promotes trophies and steers first time customers towards purchasing trophies over other products in their catalog.

Once someone visits the trophy section of the website a certain number of times, they join an automated nurturing series that shares information about the trophy product line, which includes content on everything from what you can do with trophies to how to make workplace recognition more impactful in your business.

By targeting their communications to their persona and their irresistible product, Baudville has seen an increase of seven times their normal batch email clickthrough rate.

3. Social

Responding to people on social media is personal, as is listening to your customers and prospective customers. Social is the perfect medium to interact with your persona in their normal environment.

CHAPTER 5: Guiding the Buyer's Journey



VS.



Organic

On the organic side, social media makes a powerful monitoring and engagement tool. This is your opportunity to interact with your customers, build a loyal community, and make them feel cared for. A non-automated response from a company to an individual is as personal as you can get.

You can monitor social media for a specific persona or a specific keyword (or keywords) to stay on top of particular topics. Alternatively, you can use social media to keep an eye on the pulse of your personas – what are they most engaged with? What platform are they on? How can you interact with them naturally?

Paid

Instead of spamming people with expensive PPC ads, you need to invite them into an experience that improves their lives. In an inbound ad experience, you're providing personalized and relevant product suggestions to your audience on the platforms that they visit. Targeting options and lookalike audiences enable you to get in front of your personas based on demographic information and interests.

First and foremost, the goal of inbound ads is to provide value to your prospective consumers. Ultimately you benefit from providing a more personalized ad experience as well – research has shown that personalized ads convert ten times better than ordinary ads. By personalizing and targeting the ad experience, you're making the most of your ad budget.

CHAPTER 6: Conclusion

While some of these omni-channel personalization strategies may seem futuristic, they're becoming more and more prevalent. Consumers are beginning to expect more targeted communications that are tailored to their interests, rather than a one size fits all communication that doesn't speak to them personally.

This is reflected in the engagement rates on personalized emails, which are higher than batch sends. And, 57% of shoppers are willing to share their personal information if they benefit from it. Omni-channel personalization is this benefit.

So – how can you get started with omni-channel personalization? Identify what makes your personas tick and how they benefit from your business, then connect your systems so all of this information is in a centralized place. Once that's done, implement campaigns to leverage this data. The more you personalize your interactions across channels, the more your customers will develop an affinity for your brand and continue to purchase, as well as sharing with their friends.

Wherever you are with your omni-channel personalization strategy, there's further to go to develop these valuable one-to-one relationships with your customers. Omni-channel personalization gives you the opportunity to be a thoughtful brand and drive deeper, more individualized relationships with your customers.

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