

WHITEPAPER

# Crawl, Walk, Run, Fly Your Way to Digital Personalization.



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As a marketer, if you are strategizing ways to both differentiate yourself from the competition while also forging better, stronger bonds with your existing customers, personalization should be on your radar.

In many ways, digital personalization represents the ultimate experience goal for most organizations — allowing them to fully customize an individual's experience rather than trying to fit all potential customers into a "one size fits all" box that doesn't really exist anymore.

Personalization uses in-depth information and insights about prospects and customers to give them exactly what they want, exactly when they want it.

## Personalization Leads to Stronger Prospects.

Personalization strategies are being accelerated, especially given the fast-paced world we're currently living in. [According to one recent study](#), about 80% of shoppers say that they are more likely to purchase from a company that offers a personalized experience as opposed to a more generic one. The same source also indicated that about 79% of consumers say that they are **ONLY** likely to engage with a company's offer if it has been personalized in a way that reflects any and all previous interactions that person has had with the brand.

But when you also consider the fact that [about 70% of Millennials in particular](#) say that they're currently frustrated with the sheer volume of brands sending them irrelevant and impersonal marketing materials, and that they actually prefer personalized content over blast communications, it's easy to see why this area of your business should receive more of your attention.

So regardless of the industry you're in, relevancy matters - and personalization is only going to become more important as time goes on. Thankfully, getting started with personalization within the context of your own digital transformation and larger website strategy is achievable - you just need to keep a few key points in mind.



## Prioritize Users Privacy

As you work to create your own digital personalization strategy, you must never forget how important data privacy is in everything that you're doing. People are willing to share personal information about themselves provided that you've shown you take this responsibility just as seriously as they do and will do whatever it takes to keep that information protected.

Make sure that you are always being transparent in regard to **HOW** you are using someone's data. Give people a way to opt-out of data collection if they're not comfortable with it. Always comply with data privacy laws like the GDPR or CCPA. Don't take data privacy for granted because doing so will quickly erode the fragile trust you're building with your audience.

## From Personas to Personalization: How to Get Started With Your Strategy.

The most important step to take as you develop your own digital personalization strategy involves starting not inward with your business, but outward towards the people who matter most: your customers.

If marketing success is all about getting the right message in front of the right person at exactly the right time, it stands to reason that you need to know as much as possible about who those people are - which is why buyer personas are so important.

A buyer persona is a detailed description of a fictional person who best represents your target audience. They represent the qualities and characteristics of your best potential customers, allowing you to always know who you're "speaking to" moving forward.

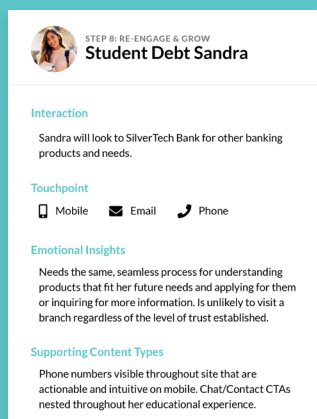
Buyer personas help organizations better understand and empathize with the members of their target audience, all so that they can do a better job of both acquiring and serving them. More importantly, they give you an opportunity to examine the things you might not normally think about.

Who is this person? What are their preferences? What level of understanding of my product do they have? How do they research? What hesitations do they often have?

By using buyer personas as an opportunity to answer these and similar questions, you come away with more valuable insight about the people you're trying to attract.

Once you have your personas in place, you can then begin to develop the type of digital personalization strategy to best meet your needs. Obviously, the steps you should take here will vary depending on the answers to those questions outlined above. If your audience is primarily older and spends more of their time on blogs and digesting long-form content like white papers, you'll obviously have a different strategy than if you were targeting a younger audience that primarily hangs out on social media sites like TikTok or Twitter.

No matter where you are in terms of personalization - from just dipping in your toes or launching a fully personalized, integrated campaign - persona development is the first important step.



**STEP 8: RE-ENGAGE & GROW**  
**Student Debt Sandra**

**Interaction**  
Sandra will look to SilverTech Bank for other banking products and needs.

**Touchpoint**  
📱 Mobile   ✉ Email   📞 Phone

**Emotional Insights**  
Needs the same, seamless process for understanding products that fit her future needs and applying for them or inquiring for more information. Is unlikely to visit a branch regardless of the level of trust established.

**Supporting Content Types**  
Phone numbers visible throughout site that are actionable and intuitive on mobile. Chat/Contact CTAs nested throughout her educational experience.

## What is a Persona?

A persona is a detailed description of a fictional person who best represents your target audience. They represent the qualities and characteristics of your best potential customers, allowing you to always know who you're "speaking to" moving forward.



## Crawl, Walk, Run & Fly.

*Once you have developed your personas, it is now time to begin developing a progressive personalization strategy and defining what personalized content you will need to support it.*

### Crawl

**For organizations just starting out, we recommend leveraging your first-party data.**

That is data you have collected and own. It could be behavior data you've collected from analytics (such as those prospects who have clicked on a particular ad) or it could be data you've collected from a prospect's online activity such as prospects who have requested more information about a particular product or service.

Start with just one or two segments of users until you are more comfortable with how this works. Once you know which first-party data cues you want to personalize for, then decide what personalized content would it make sense for those users to see on the entry page (usually a home page or landing page but not always), on an inner page or product page and as a call to action. If you keep your personalized content to just these four key places, this is a great first step into personalization.

**Let's further illustrate with an example:**

You are a bank trying to personalize a website experience for your Student Sandra persona (college student looking for college loan). There are two ways you can identify someone that fits the Student Sandra persona. First, you should have Google Ads running promoting your college loans. Anyone who clicks from the relevant ads

directly to a landing page or your website is a good match. The other way to identify someone who fits that persona would be someone who has come to your website before and requested college loan information.

In this case, you can utilize very easy personalization strategies to make sure that when someone comes to your website that meets the match criteria, that they see a modified home page hero banner advertising your college loan program, strategically placed inner page callouts advertising your college loan program, and even a link to talk to a college loan representative on your "contact us" page.

As relevant content seemingly appears at your prospects' fingertips, a seamless and convenient digital experience is delivered. Not only that but a Digital Experience Platform can deliver insights that let you know which content variants performed the best while also helping you prove the value of delivering personalized content as it relates to conversions, leads and revenue.

Applications in other industries leveraging first-party data could be purchase or order information for e-commerce or retailers, students who attended a campus tour for a university or any number of other scenarios.

## Walk

**As you get more comfortable with using first-party data for your personalized content variants, you can start to leverage other kinds of data such as inferred data.** This is information we assume or make an educated guess about a person because they are following particular patterns or behaviors. An example of this might be based on a combination of first-party data plus behavior patterns such as web page visits, downloads, etc. We can make direct correlations to what type of content individuals may be interested in. One example of this may leverage lead scoring which will help to keep track of these patterns.

For example, if a user has visited “Mortgage” page once they get 10 points. If they visit and view the application page (even if they don’t

fill it out) they get another 10 points. If they download a PDF on Mortgage Products they get 50 points. Overtime that user will pass a threshold of points that then tell the website what this person is interested in. Once identified, your strategy could include setting up personalized content variants for each of these interest areas. Each time that user comes back to the site, they will see content that matches their interests.

This is a little trickier because you do have to watch out for the pitfalls of making the wrong assumptions, what to do when an individual meets the criteria for multiple interests or personas you have set up, etc. It is often best to get the advisement of a personalization expert to help you set up the first few scenarios and get you started.

## Run

**If you are ready to run with personalization, you are likely a leader in digital transformation.** Although very few organizations have fully embraced this level of personalization, we are seeing a rapid acceleration toward this achievement with most companies expecting to be there in one to three years. For this reason, we highly recommend that even if you are at the ‘walk’ stage of personalization, that you invest in a digital experience platform that will grow with your needs in the future.

The ‘run’ phase of personalization likely includes the use of third-party data (with the appropriate

data privacy provisions in place, of course) from various sources.

A digital experience platform will be invaluable to you during this period, as this type of solution analyzes real user behavior to track every multi-interaction someone has, identifying those key touch points in the buyer's journey that lead to actual conversions and tangible results.

With a digital experience platform, you can better understand the actual timeline of the buyer's journey and see the quality of every interaction someone had before a purchase. This, too, gives

you insight into those touch points that you need to strengthen and personalize for even better results in the future.

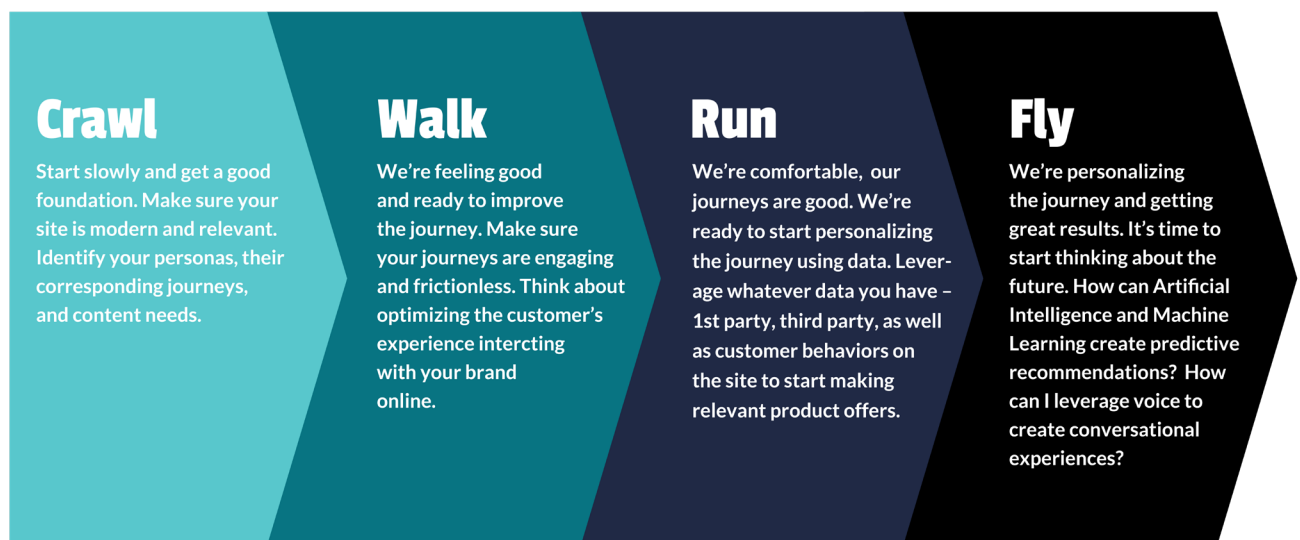
If you are in the 'Run' phase of personalization, it is likely that you are leveraging multiple data sources in your strategies. For example, a credit union might leverage third-party data by purchasing data of individuals 'in market' for a new car. They may have demographic overlays on the data to only include individuals in their region who meet certain income or credit qualifiers. This third-party data

can be combined with first-party customer data in a Customer Data Platform (CDP) so that insights and intelligence can help you to identify the 'next best product' to recommend to this individual. This is where personalization becomes so incredibly powerful. By combining and mining third-party and first-party data, you can serve individual personalized content recommendations that take into account products they already have, where they are in their decision-making process, what they qualify best for, and more.

## Fly

What comes after 'run'? If you're fortunate enough to get to this point, you're a leader and innovator so we'd say your strategy would be flying. Companies here may be few and far between for the moment, but technology sits still for no one and the world is quickly catching up. **Machine learning and artificial intelligence is being used to derive insights and 'learn' on-the-fly.**

This removes manual human intervention to determine what content variants work best, what the 'next best offer' for this individual is, and much more. Even though this phase seems light years away from where you are now, it's not that far ahead. These capabilities are available now and will become much more affordable for the average company as time goes on.



## Content is Still King.

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As you continue to develop your digital personalization strategy, you'll want to create content variants. This refers to dynamic content that is personalized based on who is interacting with it, when they are accessing this information and why.

You'll also want to track and test variants in areas to make sure that you understand exactly what type of personalized content is working and, more importantly, what isn't. Once you start to measure this over time, you'll have everything

you need to double down on the former and get rid of the latter for a better, stronger and more relevant campaign.

Finally, understand that a digital personalization strategy is not something you "do once and forget about". You will need to be proactive about using the data you continue to collect to optimize your strategy in the future. This will help make sure that you end up with a strategy that becomes more effective over time - which may very well be the most important benefit of all.

## The SilverTech Approach.

In the end, it doesn't matter what type of business you're running or even what industry you work in – data personalization is more important than ever. Consumers have come to expect it, especially during the ongoing COVID-19 pandemic when consumers have been conducting practically all business and personal tasks online.

People have grown increasingly loyal to those brands who make it easier, more convenient and more relevant to accomplish what they need and personalization is a big, big part of how you help them do it.

Likewise, your competitors are starting to step up and develop their own plans. Soon, your major competitive advantage will have less to do with the products and services you offer and will be more about the quality of the digital experience platform you provide.

Thankfully, you can start small – but the most important thing is that you just get started and make forward progress. If you understand how important improving your digital platform is but aren't sure where to begin with your own efforts, know that we are always here to help. At SilverTech, we specialize in raising the bar on extraordinary digital experiences and can help with your digital transformation, digital marketing and advertising, user experience and design, development, data integration and more.

For more information about the power of digital personalization, or if you just have any questions about digital platforms or your digital strategy, [contact SilverTech today.](#)

## About SilverTech.

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SilverTech is a digital marketing and technology company redefining how businesses engage with their customers. Founded in 1996, SilverTech delivers digital strategies and solutions that connect user experiences with innovative tech to maximize results. With services such as digital consultation and strategy, website design and development, content management implementation, custom application development and full-service digital marketing, SilverTech provides an unexpectedly enjoyable experience to solving even the most complex business problems.

SilverTech has worked with national and global brands such as Segway, Drexel University, Nova Scotia Power, Fulton Bank, State of New Hampshire Travel and Tourism, and Conservation International.

For more information visit [www.silvertech.com](http://www.silvertech.com) or email [sales@silvertech.com](mailto:sales@silvertech.com).



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