

Personalization Best Practices for Beginners

1) Start With a Strategy

The truth is, all marketing endeavors should start with strategy. For a personalization strategy, it begins with the customer. One-dimensional descriptions of consumers will no longer be adequate in the digital age. The details of the consumer profile must be expanded to include demographics and preferences.

2) Don't Go Crazy

Personalization is a delicate balance between being relevant via “feel good personalization,” and moving past the zone of relevance to “creepy” marketing. The goal of personalization should be 1-on-1 marketing that is spot on. Consumer data can help marketers provide relevant, quality, and value driven recommendations without crossing the line to “creepy.” Remember that the later, no matter how personalized, is never relevant. One tactic that helps marketers personalize within reason is the strategy of holding a “consumer conversation.” Your goal is to make an introduction, a good first impression, and developing the foundation for a strong and long term relationship.

3) Start Small to Grow Large

To begin your personalization transition you should start with easy to identify segments and characteristics that could be applicable to a large group of consumers. It is not necessary to try and personalize each and every message across each and every channel. By starting with relatively small and general categories, you will be able to give your target market the relevant recommendations they need (i.e. value). Testing channels and messages, a few at a time, is the best method to avoid being overwhelmed, and to understand what works.

4) Pick the Right Channels

One of the most important components of any successful personalized marketing campaign is selecting the channels with the highest ROI for your business and target market. Before you will know what are your “proper channels” you will have to create customer profiles, segments, and personas. Once you have analyzed your customer and established objectives, you are ready to determine your channels of use. Typical options will include: website, blog, print/direct mail, email, and social media (Twitter, Facebook, Instagram, etc.). Select a channel, build your program, test it, and then move on to the next to see what else works.

5) Understand the Consumer Journey

Once you have your strategy and are beginning to implement it, it is important to have a clear idea of the journey your consumers will take. By using Google Analytics or a similar data analytical software, you will be able to see how your leads arrive at your conversion pages and the path that they take. You can review in real time if leads take the journey you expect, they expect and where weak points in the journey appear. By having an understanding of the consumer journey, you can begin to refine and optimize it.