



GUIDE

Getting started with personalization at scale.

How to meet customer expectations at the right place and the right time, every time.



Let's start with a quick exercise.

Stop what you're doing. Find someone you know.
And say their name.

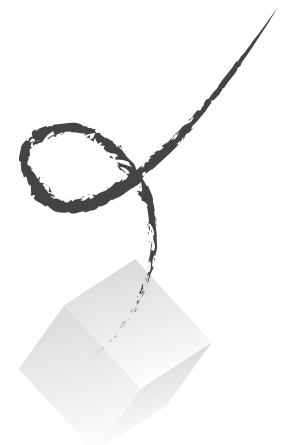
What happened?

You got their attention. And they got a rush of feel-good hormones like dopamine and serotonin. The simple act of using their name makes them feel like they're important to you—and that what you have to say next is important too.

That's the power of personalization—to make every single person feel seen and understood. To capture their attention so that what comes next has the greatest impact.

But when it comes to customer experience, personalization goes far beyond a name. It's being with them at every step of their journey. Knowing what they want before they do. And giving it to them exactly where and when they need it.

Personalization at scale is being able to do all that for *every* customer *in real time*—whether that's hundreds, thousands, or millions—*wherever* they're at. It's the future of customer experience. And it's happening now.



It's a heavy lift for small businesses and enterprises alike. But not an impossible one. Because as customer expectations have evolved to anticipate a personal experience at every turn, technologies have evolved to meet them. With the right tools, people, and processes in place, businesses can build personalization directly into their infrastructure.

It's mission critical for businesses of all sizes to start scaling personalization because, as we learned in Adobe's *2022 Digital Trends* report, the pace of change in customer experience is only accelerating. That's why we put together this personalization guide for growing businesses—to help you strategize, build, deliver, and optimize personalized experiences at scale.

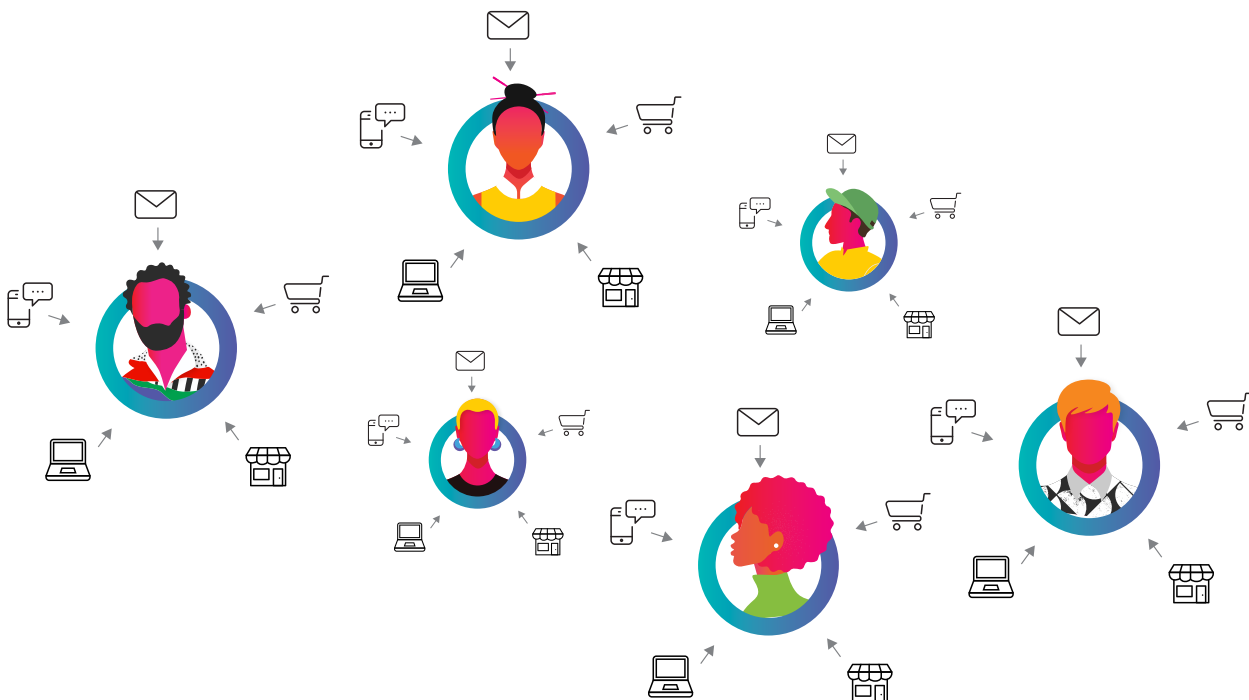


Meet millions in real time.

Personalization is delivering a customized experience to the right customer on the right channel.



Personalization at scale is being able to do that for every customer on every channel in real time.



Personalization at scale never misses a moment.

Personalization is not a new idea, but never before have there been so many opportunities to engage with customers in meaningful ways and meet their individual needs. And never before have customers expected businesses to do just that on such a massive scale.

When a customer jumps from online to off—maybe from engaging with your app to requesting help from an in-store sales associate—they expect you to keep up. To know that they just favorited a blue polar fleece tracksuit and to have a 20% off coupon for tracksuits waiting for them at checkout. After all, it is their birthday month.

Personalization at scale requires allowing customers to move seamlessly from one interaction to another, remembering their preferences and creating excellent experiences at every moment of their journey. And that takes flexibility and speed.

“ Personalization drives performance and better customer outcomes. Companies that grow faster drive 40% more of their revenue from personalization than their slower-moving counterparts.

Source: McKinsey & Company



The ROI of a personalized experience.

A Forrester Consulting study commissioned by Adobe found that companies able to scale one-to-one personalization are seeing their long-term investments pay off. In 2021, organizations that invested in improving experience to meet and surpass customer expectations grew revenue 1.7 times faster and increased customer lifetime value 2.3 times more than companies trailing behind in digital experience capabilities. These experience-driven businesses also have happier employees, which makes for more satisfied customers. From attraction to retention to advocacy, experience-led organizations come out on top with superior performance across the entire customer lifecycle.

1.7x

year-over-year
growth in revenue

1.8x

year-over-year increase in
department satisfaction

2.3x

year-over-year increase in
customer lifetime value



Source: Forrester and Adobe

In 2022, get personal or get packing.

The 2021 holiday shopping season set records, delivering over \$200 billion in revenue in the US for the first time in history, with smartphones bringing in \$88 billion (or 43%) of online retail sales.

Over the last two years, online spending has grown 44% in no small part due to the COVID-19 pandemic. More customer interactions have moved online faster than anyone could have foreseen. Customers looked to digital channels to fulfill their shopping and service needs, and businesses had no choice but to expedite their digital evolution 20 to 25 times faster than anticipated. On average, companies have achieved seven years' worth of digital advancement in mere months.

But not every company has been able to pivot quickly to meet digital-first expectations. In 2021, the gap widened between businesses who could shift to digital and those who could not.

“ As the pace of change accelerates, those faster out of the gate will be better positioned for wins this year and next.

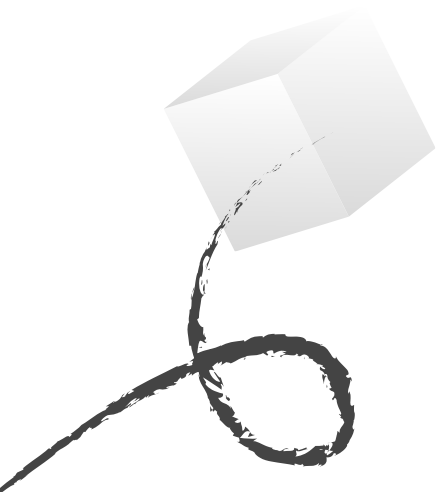
David Carrel

VP Marketing, Experience Cloud
Adobe



Companies cannot afford to underperform on personalization. Failure to do so will lead to a loss in revenue, employee morale, and customer loyalty. According to Adobe's 2022 *Digital Trends* report, 50% of senior executives are doubling down on their 2022 investments in platforms that will help make personalization possible at every step of omnichannel customer journeys. In the face of escalating competition, this is a wise and necessary move.

Mainstream and laggard organizations must redouble their efforts to respond to digitally rewired customer expectations. And experience-driven businesses in the lead need to reorient for speed to keep up with the quickening pace of change. Because in the game of customer experience, you're not just competing with other companies, you're competing with your customers' last best experience.



Five personalization challenges to plan for.

The forecast for the next 12 to 18 months warns of familiar personalization challenges, as well as some emerging challenges you'll want to watch for.

1 **Challenge:** Data is only as good as what you can do with it.

Consumers and businesses are co-creators in this new digital world. At the heart of this co-creation is data. When you have the right data, you have everything you need to personalize the customer experience. The key is turning that data into value, and that's where many brands are falling short.

Without a strong data management foundation, the data that drives effective personalization can remain siloed. It's very difficult to draw insights from unstructured and compartmentalized data. It's even more difficult to activate these insights into personalized experiences across all channels. That's the case for 78% of marketing organizations who ranked lowest on Adobe's 2022 Marketing Organization Performance Index (MOPI). They consider themselves ineffective at using data. And only 34% of practitioners below senior level categorize their "speed of acting on customer insights" as "strong" or "very strong."

Solution:

Personalization at scale becomes much more doable when you bring together your customer and account data into a single platform. And with artificial intelligence (AI) and machine learning interpreting that data, you have an even greater ability to understand your customers, build rich audiences, and create and deliver highly personalized experiences at the right moments. According to 451 Research, intelligent personalization can be responsible for as much as \$5.6 billion in additional revenue in just 6 months by encouraging consumers to spend more money with a cross-sell or personalized recommendation.



2

Challenge: Where data goes, trust must follow.

At the end of data is a human being who trusts you to keep their identity and financials safe. As the stewards of enormous loads of data, today's businesses must put security and privacy first while delivering on value in an increasingly complicated and continually evolving regulatory environment.

Consumers' growing data concerns.

79%

expressed concern over how their data is used.

73%

are concerned data will be used to benefit the brand and not them.

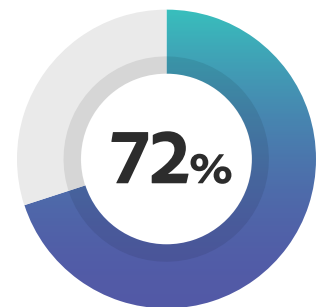
81%

say it's important to have a choice as to how their data is used.

Source: Adobe

Customers offer up their information so that businesses can use their data to ensure valuable, relevant experiences. Mismanage that data or offer up subpar experiences and there's a high likelihood they won't shop with your brand again. According to new data from Adobe's *2022 Trust Report*, 72% of consumers say that poor personalization execution, like sending irrelevant information, ignoring their preferences, or knowing too much, reduces their trust in brands, with more than 33% saying that trust is significantly damaged.

Of course, there are higher costs associated with updated security requirements. Then there's the end of third-party cookies, which 38% of businesses are still not prepared for. This puts first-party data in first place. And while 85% of marketing leaders say they are "effective" or "highly effective" at using first-party data for personalization purposes, only 66% of mainstream and 22% of laggard organizations give themselves the same props, according to Adobe's *2022 Digital Trends* report.



of consumers lose trust in your brand when personalization is poorly executed.

Source: Adobe

Solution:

Your personalization investments must include tools that allow you to securely act on first-party data to create experiences that enrich customer trust. Because trust will make it that much easier to keep data flowing as we enter a cookieless future.

3

Challenge: Content is on call 24/7.

With more audiences and communication channels than ever, organizations are struggling with the colossal content requirements of personalization at scale. Email campaigns, landing pages, lead magnets, pop-ups, display banners, ads, social posts, push notifications, digital signage—at all hours and on all channels. The challenge for virtually all organizations is that their content operation is fragmented across separate systems and non-integrated software, making it difficult for marketing, creative, IT, and other teams to collaborate productively. When people don't have insight into how their work impacts strategic goals, they can waste time on misaligned content. Employees become disengaged when they can't see why their work matters, which affects quality and slows time to market for content delivery and personalization.

Solution:

Having the right content in the right format at the right time is critical for meeting one-to-one personalization needs. To manage the growing complexity of work today, businesses need a centralized place where they can produce, publish, and store the assets that represent their intellectual capital. They need a high-powered content creation, delivery, and optimization machine.

4

Challenge: It takes consistency and connection at every stop.

A friendly disposition, engaging manner, and willingness to go the extra mile are hallmarks of good customer service. The same expectations apply to digital experiences. Deliver the wrong experience or try to engage at an inopportune moment, and you'll lose a customer. When a 20% off coupon for an item they just purchased pops up in their social feed, they're likely to feel taken advantage of, and your attempt at personalization will have missed the mark.

Solution:

Businesses are having difficulty delivering consistent and connected experiences across touchpoints. Their digital infrastructure must be running on a platform that can collect and act on data in real time everywhere the customer ventures. Currently, only 12% of companies are making nearly all their customer experience decisions using real-time data, according to *Voice of the Enterprise: Customer Experience and Commerce, Digital Maturity 2020* from 451 Research. It's safe to say that most businesses are a ways off from personalizing the entire customer journey.



\$19.3B

in lost revenue when retailers do not offer a cross-channel buying option.

12%

Only 12% of companies are optimized for real-time customer journeys.

Source: 451 Research



5

Challenge: The how-to can be overwhelming.

Personalization has proven its worth. Scaling personalization adds even more value to customers by individualizing experiences, offers, and content across channels at critical moments. But it can be difficult for brands already doing some degree of personalization to know what it takes to scale. What systems and technologies are required? What processes do we need to reevaluate? Where do we start? And where do we go from here?

Solution:

Never fear. Scaling personalization becomes easier with a solid strategy in place. Which is exactly what we put together for you.

How to get started with personalization at scale.

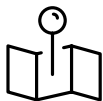
Personalization at scale hinges on four strategies:



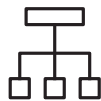
Optimize data and insights.



Streamline content and collaboration.



Deliver better journeys.



Transform your organization and operations.

As you build out your personalization plan, keep these guiding principles top of mind:

- Turn your data into a verb. Because data is made for action.
- Let value drive every interaction to instill trust.
- Make sure there are no breaks in the journey.
- Understand the context behind every move.

1 Optimize data and insights.

The first step to scaling personalization is to invest in a data and insights platform that can unify all your customer experience data—from all channels—into a single platform to deliver ideal experiences at every interaction in real time. Gone are the days when data sits in different hardware platforms, operating systems, legacy systems, and applications. Data must be centralized in a flexible, unified data model so that anyone who needs it can easily use the data for targeting and personalization. That takes several critical data management and analysis capabilities:

Identify the customer.

Your data foundation should be able to bring together data from all communication channels and stitch it into a single ID or customer profile. When customer and account profiles are integrated with other customer experience technologies, you can build segments and audiences—and then activate those profiles on all relevant destinations in real time.

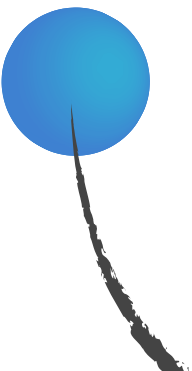
Know what they're doing at every step of the journey.

You want to be able to explore the customer journey in full context and across all data channels. To do that, you need to interpret and act on insights at every interaction—as it happens. You'll need technology that can collect, combine, break down, query, and visualize data from different sources. And that's possible with the use of AI.

We saw earlier that only 34% of practitioners (junior execs, managers, and director-level respondents) rated their "speed of acting on customer insights" as "strong" or "very strong" in a survey conducted by Adobe and Econsultancy in the last half of 2021. It's safe to assume not enough businesses are using AI to improve customer experiences and inform real-time business decisions. You don't need technical know-how to take advantage of intelligent decisioning engines. Data can be easily obtained via AI and maximized by any business to surpass the competition.

Get buy-in.

Start creating a first-party data foundation now to reduce dependencies on third-party cookies that will be eliminated in the coming 12 to 18 months. Customer acquisition is likely to become costlier, making customer retention even more important. Keep in mind, it's not just about collecting first-party data. It's about using that data to personalize experiences and add value for increased customer loyalty and advocacy. Use your first-party data to build lookalike audiences and inform and test new campaign ideas and targeting approaches.





When moments matter.

Why every business needs to start delivering customer experiences in real time.



Read *When Moments Matter: Why Every Business Needs to Start Delivering Customer Experiences in Real Time.*

[Read now](#)

Govern responsibly.

You have a responsibility to your customers to protect their data and use it to deliver meaningful and relevant experiences. Keeping track of your data and making sure it's used appropriately is no small feat. The right technology allows you to classify, manage, and enforce how your data should be used. As you're building your personalization engine, you'll want a data governance framework in place that can apply privacy rules across brands, regions, and customers.

Do it all in real time.

Poor integration between tech systems can spell doom for customer experiences. Unify your technology into an integrated martech stack to improve the customer experience, decrease spending, consolidate workflows, and minimize code maintenance. An integrated martech stack is capable of processing data immediately and delivering personalized customer experiences in milliseconds. When analytics, customer and account profiles, and personalization systems are in sync, there's no latency, no disjointed experiences, and no missed upsells.

Data and insights checklist:

- A single source of truth
- Customer and account profiles that update in real time
- AI-driven insights from every channel
- The ability to act on insights instantly
- A secure governance framework for managing privacy and regulatory compliance
- An integrated martech system



2

Streamline content and collaboration.

You can't get personal without having something to offer the customer. And that something—whether it's a coupon, an informative guide, a how-to video, or a downloadable link—involves content. You can use customer experience data to create, deliver, and refine personalized content for target market segments.

It takes a high-powered content production machine to keep step with personalization. One that connects every stage of the content lifecycle into a smooth and integrated workflow. One with a centralized content hub that's accessible across teams and built for version control. One that can repurpose content across channels and optimize assets for any screen size, device, or channel. Only then can personalization successfully scale.

For this to happen, you'll need the following critical content management and work management capabilities.



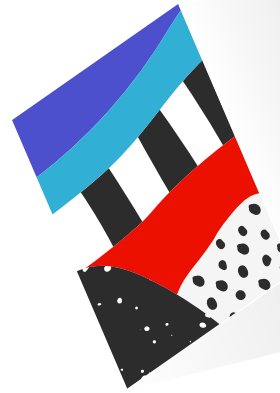
Make assets and insights available to everyone.

It's especially important to streamline creative asset management as you scale content to match your personalization efforts. With hundreds of thousands of assets on call—logos, photos, videos, banners, and more—it becomes challenging to find the right message in a timely manner. When content is contained in a single platform, creatives, marketers, project managers, and others can find the specific content they need quickly to make every experience worthwhile.

Ensure creative and marketing teams are using the most up-to-date and highest performing assets to drive greater cost savings by establishing a central hub for all content. From there, make assets easily discoverable with automatically populated metadata that eliminates waste and duplicative work. And keep insights open to everyone. This includes the ability to measure content performance at the asset level and truly understand what it is about content that's driving its performance. Relevant content teams can then use these insights to inform future content creation.

Create dynamic content that converts.

Content is there to add value for the customer, but ultimately its goal is to convert. Utilizing AI, you can create content easily that will maximize conversion based on audience preferences. Dynamic content adapts in real time to the actions, behaviors, and needs of the customer—even the in-session browsing behaviors of unauthenticated site visitors. With dynamic content assembly, you can personalize 75% of an email, tailor promotional offers, and serve up content blocks on any landing page according to customer preferences, wish lists, or past purchases. You can even send behavior-triggered SMS notifications, such as an in-store promotion or welcome message.





Mohawk Industries scores big with content and collaboration.

Mohawk Industries streamlined digital asset management with Adobe Experience Manager Assets as a Cloud Service and centralized their workflow with Adobe Workfront. Since implementation, they've enabled self-service access to digital assets for almost 3,000 salespeople and 2,000 independent retailers and internal staff. They've tightened collaboration by aligning initiatives into a marketing system of record. And they can track performance with robust KPI tracking. Mohawk anticipates \$5 million in direct incremental revenue gain from accelerated time to market and more than \$1 million in direct capacity gain from improved automation.

"With a fully integrated technology portfolio, we can reduce our time to market by 85% thanks to the improved collaboration we are seeing between product and marketing teams."

— Brennan Swing, Vice President of Creative Media and Creative Director, Mohawk

Activate content anytime, anywhere.

Once you have the tools in place to assemble dynamic content, you need to be able to send that content to the appropriate destination—website, mobile app, social media feed, digital sign, IoT devices, and more—at the exact moment the customer wants it. When you can activate the most relevant content at the perfect occasion, you turn engagement into profits. With the right technology empowering your content production machine, you can deliver dynamic content in real time via API to any touchpoint in the customer journey.

Infuse collaboration in the content lifecycle.

The hybrid work model is here to stay, and it calls for new modes of collaboration. A work management system enables teams to connect projects to strategic imperatives and prioritize work while collaborating from anywhere. When work is centralized in one place, every team member gets the big picture, from strategy to results, so they can see the impact of their work and let that feedback guide future decisions. You get greater clarity and can pivot with agility. And when you integrate your work management system with the various tools creatives work in, you can accelerate work velocity without compromising compliance or quality standards.

Content and collaboration checklist:

- A centralized content hub
- The ability to dynamically assemble high-converting content
- The ability to deliver that content to any channel in real time
- A work management application to facilitate and accelerate collaboration



3

Deliver better journeys.

Customers have more ways than ever to discover and explore new brands, and there are transactional capabilities embedded everywhere. Consumers can purchase in stores, online, in apps, in email, on Pinterest or Instagram—you name it. Meanwhile, marketers are tasked with managing increasingly sophisticated omnichannel customer journeys. They need the tools to deliver personalization at every stage of the customer lifecycle—from awareness and acquisition to engagement, conversion, and retention. Delivering better journeys requires several cross-channel campaign management capabilities.

Orchestrate a seamless experience.

Orchestrating the customer journey means coordinating experiences in real time so that customers continue to engage with your company. Omnichannel orchestration is the ability to create seamless, personalized experiences across different channels—web, mobile applications, email, online chat, SMS, push, in person, and over the phone. At every interaction, the customer should be able to pick up where they left off.

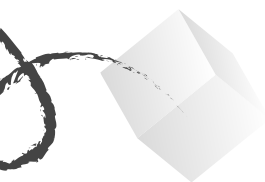
Building personalized omnichannel journeys can get complicated. Especially if you're managing customer journeys with a glut of tools like email service providers and mobile engagement platforms for messaging, as well as additional tools for offer management and real-time decisioning.

A unified interface makes it easier to coordinate cohesive customer journeys. You can create and deliver real-time personalized interactions in addition to scheduled audience-based messages from a single platform. It makes it easy for even nontechnical practitioners to segment audiences, design and personalize messages, and build end-to-end journeys that delight.

Show them you care again and again.

If you want to keep customers loyal for a lifetime, you've got to show them how much you care from the very first interaction. And then never take your attention off them. You must be able to personalize interactions for guests, fans, subscribers, buyers, members, and shoppers across the customer lifecycle. The good news is that the technology to automate and customize experiences is available and ready to help you take great care of your customers.

A unified platform that monitors customer engagement at every touchpoint gives you a complete view of the customer lifecycle from end to end. Set yourself up for personalization success with a customer data platform (CDP) that can integrate all data securely, incorporate AI and machine learning for customer segmentation, orchestrate marketing messages and campaigns, and move customers through the entire journey on all physical and digital channels.





Sealed Air makes the move to digital.

Sealed Air responded to the pandemic by partnering with Adobe to become a digitally driven company and optimize the customer lifecycle. They use Adobe solutions to digitally enable their processes and power a full online business model—upselling, cross-selling, and digitally linking packaging design teams around the world.

“Our customers are looking for a more personalized, simplified online buying experience. We need to be at the table and online with our customers. Our partnership with Adobe will help us streamline our digital customer journey.”

— Ted Doheny, President, CEO, Sealed Air



Don't make them wait for personalization.

Eight seconds. That's the average person's attention span. If you want to deliver better journeys, you'll need to be able to react to behavioral data in real time and in tandem with your planned campaigns. Our reflexes aren't fast enough. But a machine's are. Leverage AI and machine learning to intelligently predict what customers will do next—and then deliver the best recommendations and content to personalize offers at scale.

Never stop learning.

Put your personalized experiences to the test with A/B/n testing (the "n" in A/B/n stands for the unknown number of variations you'll test). Customers are fickle, and you'll want concrete data to determine the content that best engages and converts, and the content that may be costing you customers. You can test multiple variations of an entire experience, including images, copy, UI, and more, across inbound and outbound channels to improve key performance indicators (KPIs) and business outcomes. Choose an A/B/n testing tool that allows you to run as many variations as you need, and that includes a visual experience editor so you can make changes without having to code.

Customer journey checklist:

- A unified interface for omnichannel orchestration
- A fully integrated CDP
- AI and machine learning for real-time personalization across channels
- An A/B/n testing tool



4

Transform your organization and operations.

Your digital technologies and operations capabilities need to be set up for success to achieve personalization at scale. And that takes buy-in from the entire organization.

In addition to investing in technologies, it's important to foster a culture that champions data-driven decision-making and agile marketing operations. Online and offline teams must corral around a single omnichannel strategy. Cross-functional collaboration operates on the following principles:

Collaboration starts with the C-suite.

Personalizing the customer journey for millions doesn't happen overnight. It might take years to build out capabilities across channels. This is where top-down C-level support comes into play. As personalization scales, C-suite executives are needed to make sure that strategies align with enterprise business goals, to secure the necessary funding and continue to advocate for enterprise-wide transformation.

The CMO and CIO need to be tight.

Chief information officers (CIOs) are responsible for all the technology that makes personalization possible. And chief marketing officers (CMOs) are responsible for creating the personalization experiences that technology powers. The stronger their partnership, the better able they are to keep pace with changing customer expectations and needs. When your CIO and CMO act from a shared vision, your organization can develop and deliver more creative, agile, and innovative experiences.

“ If IT can provide the right data, then marketing can take that data and use it in the right way. Being able to do that in real time together to understand the customer journey and end-customer experience is absolutely key.

Belinda Finch

Chief Information Officer, Three



It's a team effort.

The spirit of collaboration between CMOs and CIOs must trickle down to senior executives and their teams if companies want to execute personalization strategies. Yet recent surveys show that marketing and IT teams aren't collaborating to their full potential.

Adobe's 2022 *Digital Trends* report found that only 47% of senior executives believe their marketing or experience teams collaborate successfully with their technology counterparts. Of these senior executives, 65% don't think their organizations are doing enough to break down the silos created by organizational structure or competing KPIs. Junior executives, managers, and director-level respondents agree, with only 34% scoring the collaboration between marketing and IT at 8 or higher out of 10.

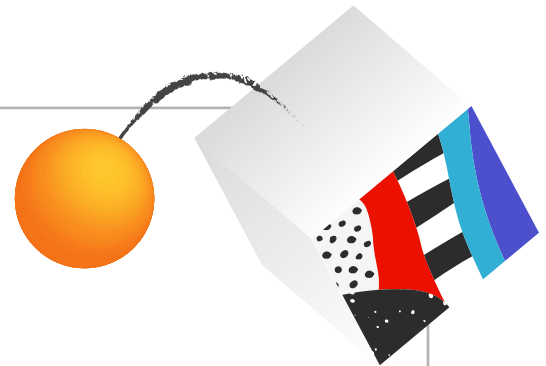
To strengthen collaboration, senior executives must check in with their teams regularly to see where they're struggling and what's impacting work day to day. In addition to listening, executives need to clearly communicate the importance of personalization initiatives and promote a collaborative exchange of information and services across departments.

A governance or center of excellence team can help.

Put a team of business and tech executives dedicated to collaboration in charge of your digital transformation program. This governance or center of excellence team will map out the strategy, prioritize capabilities and use cases, develop the business case for buy-in, and create a step-by-step implementation plan. Your center of excellence team will also be responsible for restructuring business processes and identifying the organizational changes that are needed to usher in personalization at scale.

Collaboration checklist:

- Support from the C-suite
- A harmonious CMO/CIO partnership
- Cross-functional collaboration between senior executives and their teams
- A center of excellence team



It's time to get up close and personal.

The world's gone digital and businesses have gone global, but personalization can bring you closer than ever to your customers—even when you have millions. With the right personalization moves, you can do more than just know your customers. You can earn their trust and achieve higher acquisition, satisfaction, and retention while you're at it.

Make digital more personal and create better customer experiences.

- Maximize data and insights with cutting-edge collection, insights, and profile technologies.
- Build a scalable content delivery engine with market-leading solutions for content production, collaboration, delivery, and optimization.
- Create seamless personalized journeys with technologies built to power omnichannel orchestration at every stage of the customer lifecycle.
- Implement the necessary cultural and operational changes to stay agile and respond quickly to evolving customer expectations and market dynamics.

You can do it all with Adobe. Discover how our solutions can support your digital transformation needs and help you achieve your personalization goals.

[Get details](#)



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