





Personalization Maturity Within B2B Companies

With the rise of the self-educating buyer and the fact that the vast majority of visitors to websites remain anonymous, it is critical for B2B companies today to find ways to turn anonymous visitors into addressable prospects and serve the relevant content that drives them to convert.

An April, 2016 poll conducted in conjunction with MarketingProfs highlights the growing opportunity around personalization. While personalization is broadly adopted in email, with 71 percent of B2B marketing organizations segmenting their audience and serving targeted emails, it is now also growing rapidly in other channels, with 32 percent of respondents reporting that they are also serving personalized content on the website.

	 STAGE 1 Awareness	 STAGE 2 Connected	 STAGE 3 Targeted	 STAGE 4 Optimized
STRATEGY	Learn	Align	Deliver	Optimize
AUDIENCE	Market to the masses	Target audience defined Buyer's journey in place	Understand engagement of target audience	New audience segments uncovered by data
DATA	Siloed	Connected	Insightful	Actionable
CONTENT	Content is created to appeal to widest audience possible	Content is personalized by segment, but limited to one channel, typically email	Content is personalized across multiple segments Content effectiveness reports guide decisions	Cross-channel personalization solution is integrated across all marketing organizations and extends to paid media, website, social media and email
MEASUREMENT AND LEARNING	Basic website and content engagement metrics	Reporting on audience composition and content effectiveness	Reporting on impact of cross channel personalization	All analytics integrated to measure effects of personalization across all channels
OUTCOMES	Awareness of the ROI around personalization	Clear view into your website audience and what content is most effectively converting them	Ability to leverage all your marketing data	Significant improvement across all website metrics Consistent buyer's journey across all channels

The following description of the four maturity stages, with initiatives and deliverables, can help serve as a guide when thinking about your program and what is needed to get to the next stage.



Stage 1: Awareness

In the awareness phase, organizations become aware that they can improve the results of both their outbound and inbound marketing efforts, throughout the entire funnel, by ensuring that prospects are treated differently, according to their unique characteristics. The marketing team is typically struggling with problems such as generic content under-performance, the lack of insight into anonymous traffic, little to no segmentation of audience and underperforming paid media. Typically in this stage, a single marketing leader is helping the rest of the organization understand the benefits of personalization and what it will take to implement.

Initiatives for Stage 1

- Define the value of the opportunity
- Find an internal owner
- Recruit an executive sponsor
- Build alignment on strategy and approach
- Identify cross-functional champions (web, IT, demandgen, media)
- Identify owners of data (disparate marketing platforms)

Deliverables Completed During Stage 1

- A long term personalization strategy to sell internally
- A personalization and content audit/gap analysis
- Roles and responsibilities document
- Budget for technology and content development



Stage 2: Connected

In the connected phase, the idea of personalization is prioritized by the rest of the organization and the focus becomes enabling the technology to support the short and long term personalization strategy of the company. Organizations bring together their disparate marketing platforms, including CRM, MAP, DMP, CMS and ABM. Often, companies in this stage are doing some email personalization and using a marketing automation platform such as Marketo or Eloqua. Now, they can go even deeper because with customer and prospect data together, they can begin to learn about their audience and their content effectiveness. With actionable data, they can begin planning for cross-channel personalization.

Initiatives for Stage 2

- Connect marketing platforms
- Review comprehensive audience data and understand sources for anonymous and known data
- Review existing content effectiveness and identify gaps and opportunities for improvement

Deliverables Completed During Stage 2

- Short term personalization strategy and roadmap for website personalization (3 month plan)
- Agreement around top segments to target, in conjunction with demand gen/email team
- Buyer's journey complete for top segments and necessary content developed



Stage 3: Targeted

In the targeted phase, organizations use connected data to begin personalizing content on the brand.com site. They are using segments defined in their MAP, CRM or ABM to drive simple personalization experiments on the site to determine the effects of relevance on conversion. With personalization results, they can begin creating the use case for wider company adoption.

Initiatives for Stage 3

- Begin personalizing content on website, starting small and measuring results and focusing on top 2-3 segments, likely from MAP, CRM or ABM
- A/B testing and optimization of content and messages
- Work with media team to understand digital ad strategy and where personalization can drive additional value

Deliverables Completed in Stage 3

- Personalization ROI report
- Cross-departmental plan for long-term personalization strategy
- Buy-in from media team that personalization can drive more from ad spend



Stage 4: Optimized

In the optimized phase, connected personalization is rolled out company-wide, versus just being used by a single department or two. Channels become less important as teams begin working together to ensure that relevant, sequenced content can be rolled out, based on engagement, across paid media, social media, the website and email. Content is developed with clear segments in mind and personalization becomes an embedded function within each marketing department. Usually in this phase, every marketing department is doing personalization and the company looks to hire a VP of Personalization to oversee efforts.

Initiatives for Stage 4

- Increase personalization efforts beyond top segments to ensure personalization is prevalent across all segments and channels
- Ensure that every marketing team is aligned on segments and personalization efforts
- Begin to use predictive data to personalize content and messages

Deliverables for Stage 4

- Single report that highlights effects of cross-channel personalization on conversion across all channels
- Personalization KPIs developed for bonus plans

Bound is an audience profiling, segmentation, and personalization solution. The platform delivers powerful insights by combining data on known and anonymous audience, leveraging over 30 data partners including LinkedIn and Bombora. Combined, the platform and personalization experts empower marketers to build advanced segments and deliver personalized experiences that increase ROI on digital channels, convert leads, upsell, and close deals. Get started with an Audience Insights Report today.