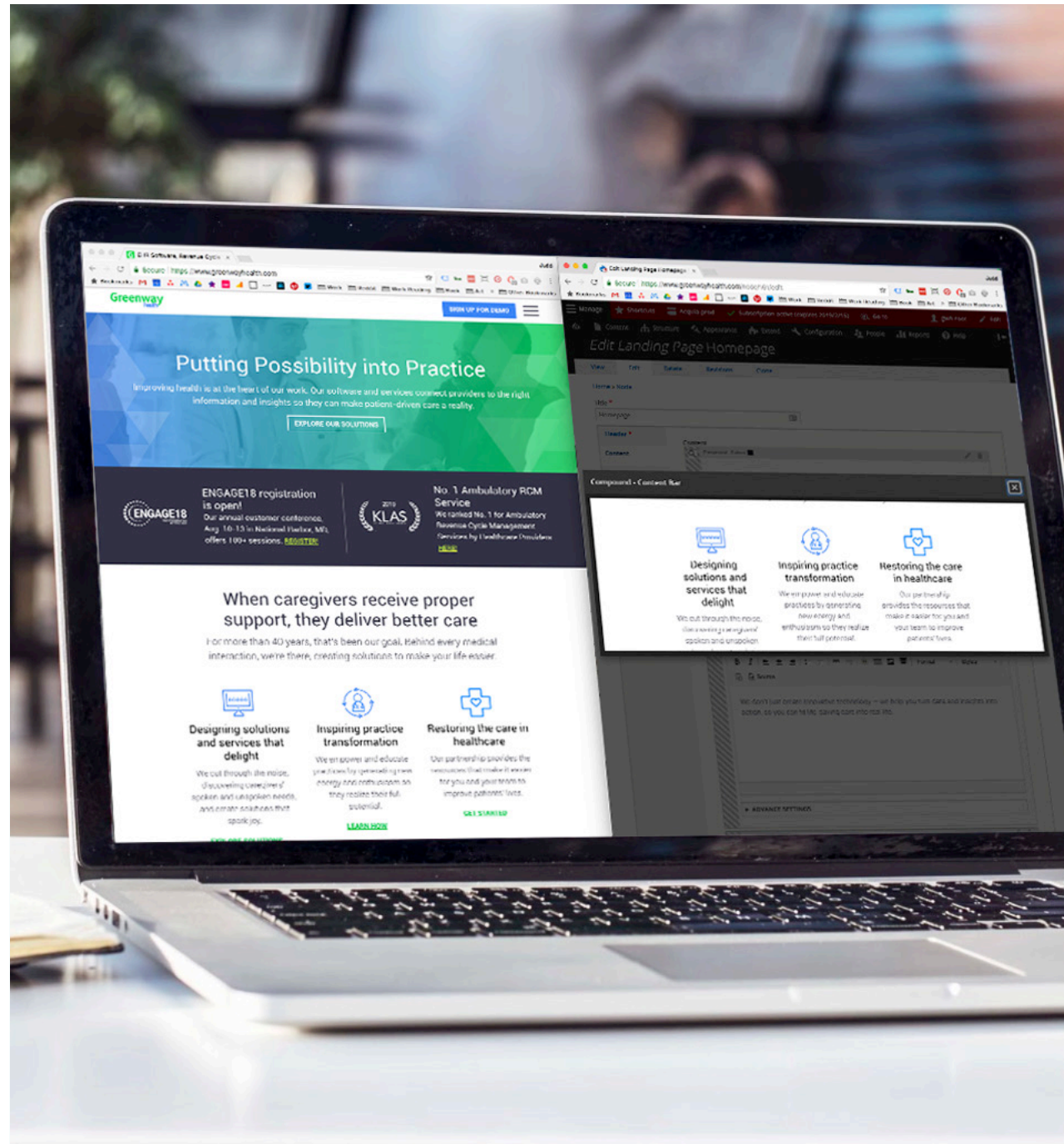HELLO
{NAME}

GO BEYOND B2B
PERSONALIZATION
WITH DRUPAL

elevated
third

IT'S NOT COMING.
IT'S HERE.

Marketers like you know of the importance of web personalization in 2019 and beyond. Personalization has become a critical tool for successfully engaging B2B customers—for the ones doing it. With the growing importance of end-to-end digital experiences and targeted initiatives such (ABM), personalization is no longer a novelty. It's a requirement.

But while the data prove personalization works, studies show marketers are struggling to find ways to prioritize it and make it happen.
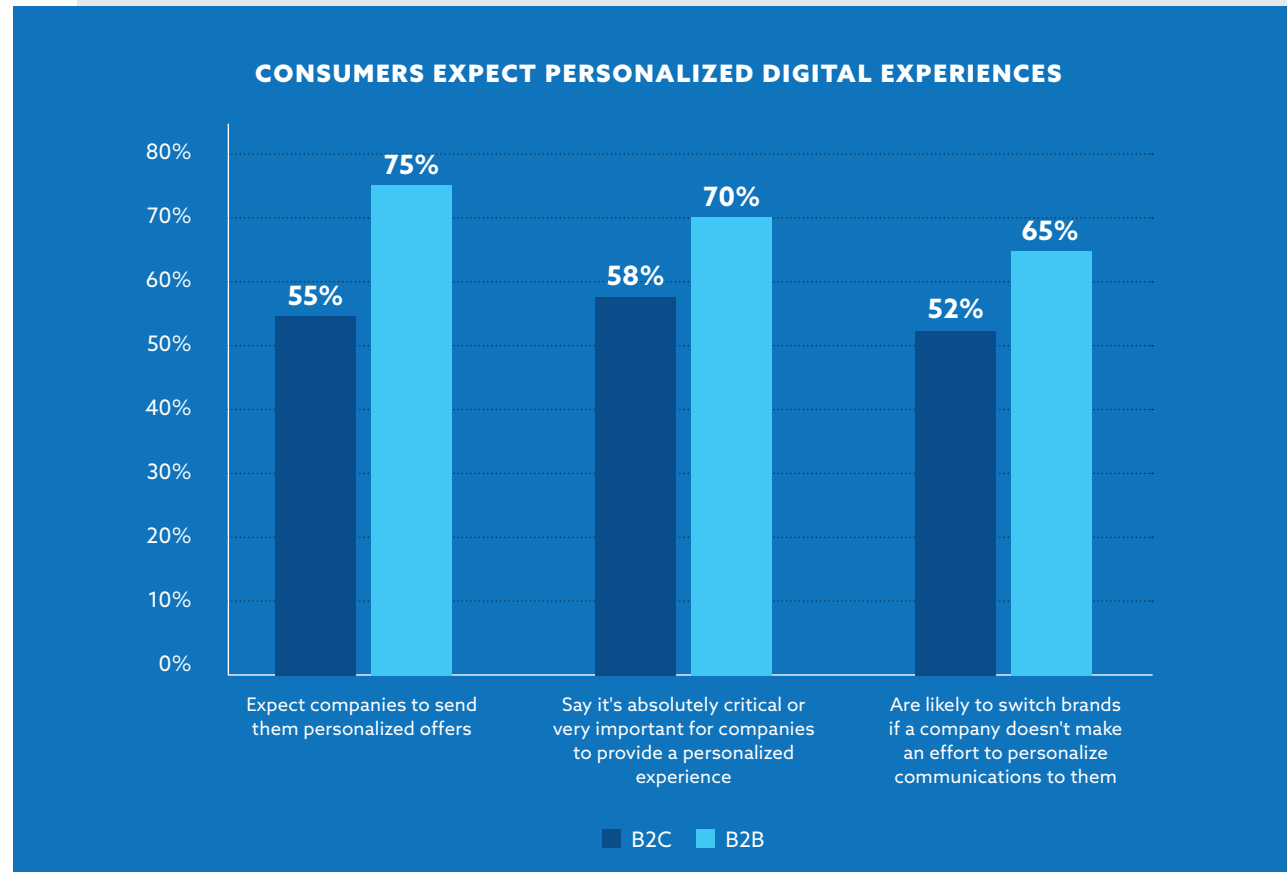
WHAT IS WEB PERSONALIZATION?

Web personalization is the strategy of delivering content specifically relevant to an individual so that they are more likely to engage with a brand. When a prospect feels like someone gets them, they stick around. They read more content. They go further into the funnel. They convert.

BUT HOW DO YOU DO IT?

The foundation of a personalization strategy is a combination of data, customer segmentation, targeted content, and measurement. But knowing the buzzwords isn't enough— Personalization doesn't work without a technology solution to make it all possible.

Even the most savvy of marketers can get tripped up with vendors overcomplicating things and web research making personalization sound unattainable. Add in the rise of ABM platforms, all of which dabble in the personalization game, and it can be tough to make the right choice.

But don't worry. If you've bought into open-source and are leveraging the power of Drupal already, you're half-way there.

Source: State of the Connected Consumer, published by Salesforce

CONSUMERS EXPECT PERSONALIZED DIGITAL EXPERIENCES

Chart showing percentages for B2C and B2B:
- Expect companies to send them personalized offers: B2C 55%, B2B 75%
- Say it's absolutely critical or very important for companies to provide a personalized experience: B2C 58%, B2B 70%
- Are likely to switch brands if a company doesn't make an effort to personalize communications to them: B2C 52%, B2B 65%

Legend: ■ B2C ■ B2B

If you're a B2B company on Drupal, you're closer to personalization than you think.

You might think you don't have what's needed to start experimenting with web personalization because of technical hurdles. Maybe. But by leveraging contributed Drupal modules and some third-party platforms you likely already have, you might actually have everything you need.

68%
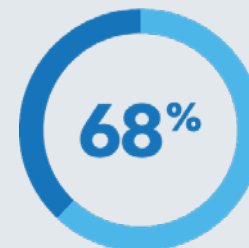
Digital experience leaders who say personalization is **a priority for their business.**
– ACQUIA.COM

I DON'T HAVE THE TECH STACK FOR PERSONALIZATION

"My CRM, marketing automation platform, ad tracking service, and analytics tools don't talk to each other. So how can I personalize my visitors' experiences on my website?"

DON'T PANIC, START WITH WHAT YOU HAVE

You have all, or some, of the technology that you need already. You send emails with offers. You get people to landing pages via PPC. You have a prospect database and you're tracking leads…somehow. Most importantly, you're using Drupal—the key ingredient to an open marketing stack.

HELLO, SMART CONTENT

Smart Content is a light-weight, real-time web personalization solution for Drupal 8. It's a collection of contributed (aka **free**) modules that let you start personalizing your site in a day or less, using data and content that you already have. It's a great way to get started as you learn the personalization ropes.

TALK DATA TO ME

Web personalization using **Smart Content**, or a more sophisticated personalization platform such as **Acquia Lift**, starts with the most basic user data. Variations can be configured to show different content depending on a variety of criteria. **A variation might ask:**

+ Did a user come from an email campaign?

+ Do we know if a user is on a phone?

+ Are they a new or returning user?

PICK THAT LOW HANGING FRUIT

Select the most impactful pages in your site funnel and experiment with how personalized content might impact conversion rates. Leverage audience segment data from your CRM, behavioral triggers (page visit, email click) or demographic criteria (location, pre-selected industry) to adjust content on your site.

If you have any experience with ABM, this start-small strategy will sound familiar. In fact, ABM and web personalization pilot programs work in tandem and are a great way to increase the overall effectiveness of a campaign.

smart content

Smart Content is our answer to clients who put investment and energy into their Drupal platform and don't want to invest heavily in something else to deliver tailored content via that very same platform. We knew Drupal 8 could offer a solution.

Mike Lander, Technical Director, Elevated Third

SIMPLE PERSONALIZATION WORKS

CentralSquare needed a way to demonstrate their understanding of customer needs across different geographic regions, each with unique problems.

With personalization, landing pages have dynamic header banners that adapt to visitors based on location conditions. For example, if someone in Wichita Falls, Texas, visits CentralSquare's site, the header banner and copy speak to issues facing that region of the country.

How does it work? Personalization relies on a series of if-then statements. If the value is X, then display Variation 1. If the value is Y, then display Variation 2. You get the idea.

In this example, we use third-party IP detection to identify location, industry, and company size from a user's IP address. Smart Content then uses that data to swap content on-the-fly—in real time.

WE DON'T HAVE ENOUGH CONTENT FOR PERSONALIZATION

"My marketing budget is stretched thin enough as it is. How is my team going to write a variation of content for every customer segment?"

THINK "TAILORED" INSTEAD OF "MORE"

A nimble, efficient personalization strategy makes the content you already have **work harder**. You don't need to write a brand new whitepaper for every subset of your customers. Instead, focus on leveraging the content you already have. Often, slight adjustments are all that you need to speak more directly to a target audience.

BRING OUT THE COMPONENTS

Component-based web design is a modular approach to building sites where the idea of pages is replaced by blocks or regions of interchangeable content. This makes maintaining sites easier and is ideal for personalization. Components allow content to be swapped and reused dynamically across web pages. Instead of redesigning entire pages, you can assemble a personalized experience from content that you already have.

SIMPLE ON-PAGE ELEMENTS TO PERSONALIZE

+ Calls to Action
+ Customer Logos and Testimonials
+ Gated Content
+ Hero Images
+ Headlines
+ Events

Use your existing library of components and focus on creating simple variations of webpages. This reduces the burden of content creation and makes it easier to put relevant content in front of the eyes of your target users. Think *variation*, not recreation.

Acquia Lift

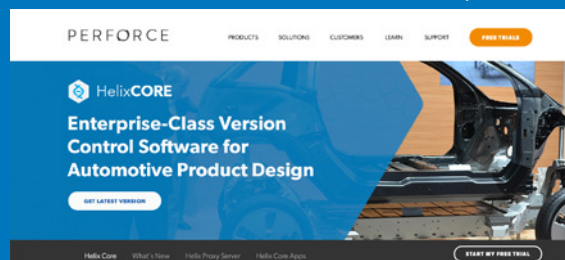With Acquia Lift 4.0, advanced personalization in Drupal is here. Lift 4.0, new for 2019, offers new features including:

+ Create scheduled personalization campaigns
+ Built-in A/B tests with advanced segmentation control
+ Improved point-and-click, on-page editing
+ One-step content recommendations

Standard banner

Personalized banner for automotive industry

SEE IT IN ACTION

A first-time visitor explores product pages and case studies specific to the Finance industry.

In this case, Smart Content, sets a cookie after these pages are viewed, telling Drupal this user falls under the "Finance" segment.

When that user returns to the site, the industry-agnostic testimonials you normally have on your homepage will be dynamically populated with testimonials from some of your biggest finance partners.

Instead of having this content buried under case studies and page hierarchies. It's now front and center.

A broad testimonial that feels generic and means nothing to the user

-A job title and company that the user does not care about

What they would have seen

A relevant testimonial that qualifies the product with industry-specific proof

-A job title and company that the user recognizes and identifies with

Personalized content

MY DATA IS
A MESS

"I've got Google Analytics, Salesforce, Marketo, and Drupal collecting data about my prospects and users. But I have no idea how to make them work together. Organizing all of this data and translating it into actionable audience segments makes my head spin."

Delivering personalized content requires a mechanism to identify users and place them into clear-cut segments. Your data collection options are vast. It's easy to feel overwhelmed and get lost in all the possibilities. But again, we caution to start small with some of the most common ways you can start to segment your users.

Did you know?

74%

74% of customers **feel frustrated** when website content is not personalized.
-**INFOSYS**

Implicit & Explicit Data

IMPLICIT - BASED ON BEHAVIOR	EXPLICIT - BASED ON ATTRIBUTES
+ Click Path	+ Geographic Location
+ Downloads	+ Device
+ Purchase	+ Job Title
+ Referral Path	+ Age
+ New vs. Returning	+ Data from CRM or a Third Party Tool

IMPLICIT VS. EXPLICIT DATA

At the most basic level, data can be collected from either **Implicit** or **Explicit** information.

EXPLICIT DATA

Explicit data relies on user attributes that typically derived from straightforward criteria, like demographics or a customer profile. Some common examples include age, location, or industry.

IMPLICIT DATA

Implicit data is based on user behavior and relies on well-educated assumptions. If a user views three case studies related on a single industry, we can assume they are a member of that industry and drop them in the corresponding segment.

REPORT WHAT YOU CAN

There are probably opportunities to use the tools you have to tell a better data story. Google Analytics, for example, is something you already use to track UTM strings and website analytics, why not use it for personalization, too? Both
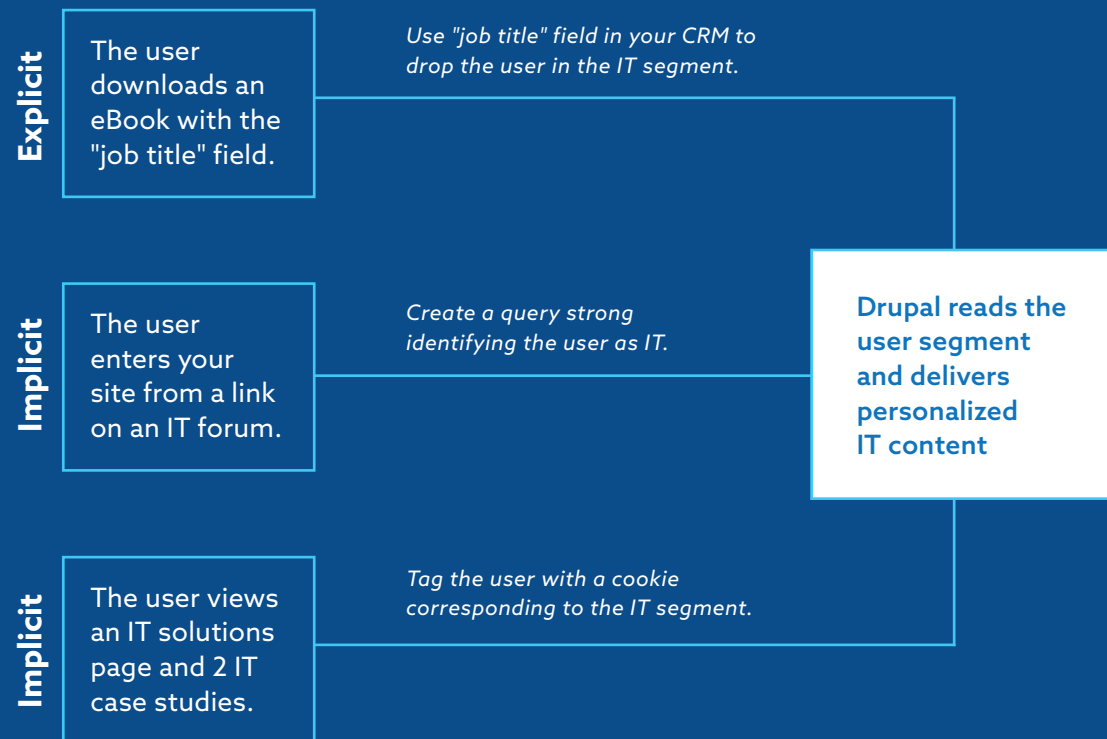
Smart Content and Acquia Lift can tap into Google Analytics for cohesive reporting. See which users see which variations in aggregate, then look at your campaign conversions to correlate. While it's not a perfect system at first, people often get enamored by the dream of integrated data

without understanding what questions they want to answer first. Just start! As long as you have basic engagement stats, conversions, and a control group, you'll be able to point to initial results.

Drupal can organize both Explicit and Implicit data.

LET'S TAKE A LOOK AT THIS IN PRACTICE:

Consider a prospect who works in the IT department of a major financial services firm.

Explicit

The user downloads an eBook with the "job title" field.

Use "job title" field in your CRM to drop the user in the IT segment.

Implicit

The user enters your site from a link on an IT forum.

Create a query strong identifying the user as IT.

Implicit

The user views an IT solutions page and 2 IT case studies.

Tag the user with a cookie corresponding to the IT segment.

Drupal reads the user segment and delivers personalized IT content

I JUST DON'T KNOW WHERE TO START

"My marketing budget is stretched thin enough as it is. How is my team going to write a variation of content for every customer segment?"

THINK BEFORE BUYING THE FANCY SKIS

Our office in Denver is surrounded by ski culture. A lot of enthusiastic newbies outfit themselves with top-of-the-line ski gear because, if you spend the money you'll ski well—right? Locals know you don't need the high dollar equipment if you barely know how to pizza-and-french-fry down a bunny hill.

If you *are* ready to dive headfirst into a deeply comprehensive program, a platform like **Acquia Lift** provides powerful tools that can give you granular control over site-wide personalization and 360-views into visitor behavior. And just like ski gear, if you want to get some reps in before going pro or if you'll never have the need or budget for pro gear, you have options.

START WITH THE FAMILIAR

The Smart Content module allows you to start personalizing using the existing Drupal 8 infrastructure alongside a component-based design system. With the right planning, you'll be experimenting with personalization on your Drupal website in a fraction of the time it takes to implement anything else. More importantly, you'll start to learn what messaging and content moves your audience. That's insight you can use anywhere.

KEY TAKEAWAYS

+ **Prospects have high expectations of you.** They're spending more money and taking longer to decide. You know how to talk to them as individuals—but you need the means to do it.

+ **The pressure to get sales increasingly warmer leads is only going to increase**—you need something to keep pace.

+ **Personalization has good ROI**, for those companies who are doing it right—isn't better to start small than not at all?

+ **More than half** of US senior decision makers said their organization often fails to deliver the personalization customers crave[1]. But you've got the tools, you've got the talent.

Personalization takes a good dose of innovation, perspiration, and imagination to get it done well. If you need help, we're here to show you the ropes.

> *If you're brand new to skiing, it's probably not a good idea to purchase $3,000 skis your first time on the mountain. It makes sense to have a stepping stone first. Smart Content is the stepping stone to personalizing your content in Drupal.*
>
> Judd Mercer, Creative Director, Elevated Third

1. Survey by Verndale, customer experience agency

A LITTLE INSPIRATION

A home security client of ours wanted to incorporate personalization into their Drupal 8 site to show prospects a customized solution recommendation. They started with only two user contexts: those who were passively looking for home security solutions, and those who had recently experienced a security incident. The hypothesis was that each group would be motivated by distinct messaging.

Using their existing Drupal 8 site, they guided users through a short assessment and—via Smart Content—presented very targeted results and offers based on their answers. Smart Content used the quiz as the data source and listened for simple triggers in their answers to show versions of content for one segment vs. another.
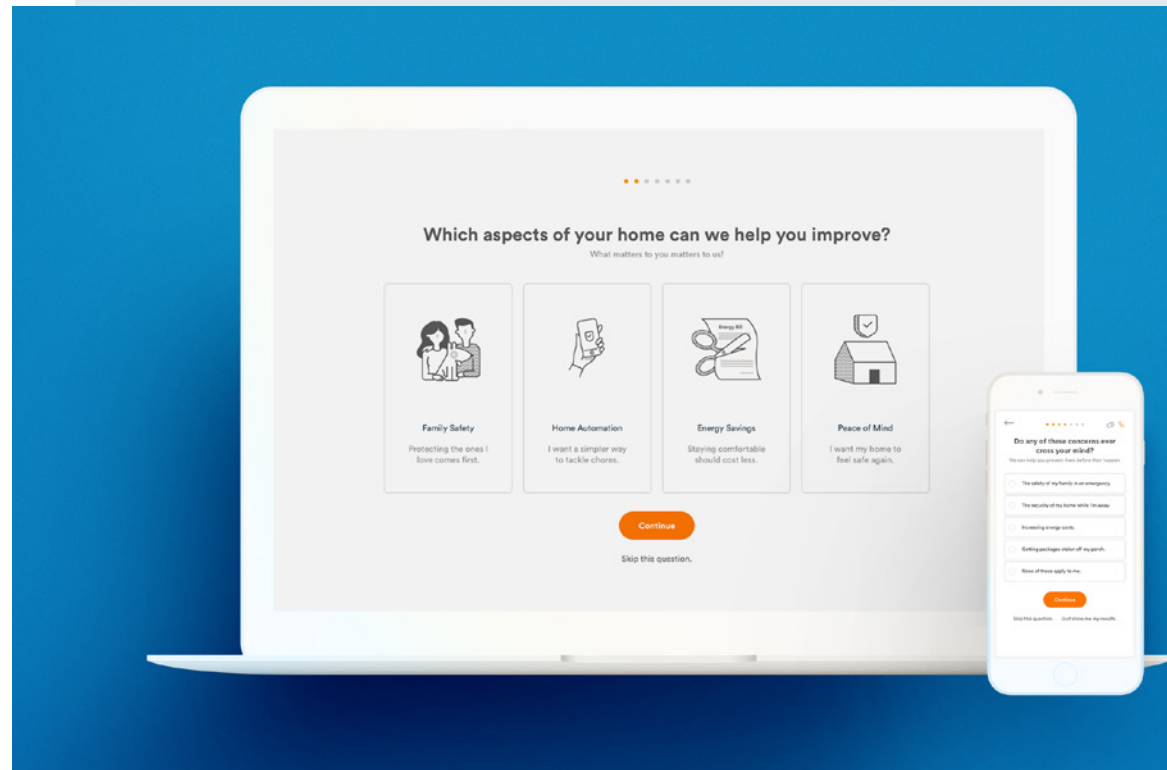
We started with these basic ingredients

+ Two customer contexts (the segments)

+ One set of questions with defined triggers (the data source)

+ Two sets of personalized results and offers (the content)

+ One tool: **DRUPAL 8 + SMART CONTENT MODULE** (the technology)

With our help, the client got a personalization test up and running on their Drupal 8 site without an external personalization system, using data gathered in-the-moment.

NO MORE ASSUMPTIONS

PERSONALIZATION IS IDEAL FOR THE B2B SPACE:

+ Audiences are narrower. It's easier to know what your prospects need.

+ Your prospects have higher expectations of you. They are typically spending more money and taking longer to decide, so they want to know that they aren't generic to you.

+ Pressure on marketing teams to get sales increasingly warmer leads requires a change in strategy.

Because it's proven to increase ROI for those companies who are doing it right, personalization can no longer be ignored. And if you can start small with lower investment, it can mitigate the risks many marketers associate with starting at all.

More than half of US senior decision makers surveyed by customer experience agency Verndale said their organization often fails to deliver the personalization customers crave. Instead of being part of that statistic, take the step to extend your existing technology and build the expertise needed to take your personalization vision to the next level.

We've started to demystify the tech behind personalization here. Get in touch to see a tour of our Smart Content Drupal module in action and understand how easy it could be for you to get in on the personalization game.

CONTACT US
To tour Smart Content.

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STILL ON DRUPAL 7?

Find out why migrating to D8 will set you up for the long(est) run.

elevatedthird.com/d8