



Putting Personalization on a Faster Track

How to develop a personalization strategy
that is practical, scalable & effective



Up to this point, the problem with personalization can be summed up in a single word: **slow**. Traditional personalization strategies have taken far too long to implement and once they are finally implemented, any benefits they may provide have been undermined by the huge drag they place on overall site performance.

Is it any wonder that more and more companies are asking whether personalization is even worth the trouble, worth the money, and most importantly, worth the time? Companies who once had high hopes for personalization are dropping it like the proverbial hot potato. In fact, Gartner predicts that by 2025, 80 percent of those who invested in personalization will abandon it.

Although many companies plan to abandon personalization altogether, the answer is not to give up the dream, but to adopt an agile, composable, well-thought-out, and iterative approach that is not only speedier to implement but also provides faster performance. Here's how to do it.

Rethinking your personalization approach

Rather than aiming for “big hairy audacious goals,” “big assumptions,” and “big timelines” of personalization projects past, you need to think small and iterative this time. If you adopt the right technology and invest in sufficient effort on the front end, the result can actually be quite agile, expandable, and profitable. The success of this new personalization approach depends on two major factors: speed and planning.

The need for speed

When it comes to personalization, speed means two distinct things: the speed at which personalized sites deliver content to their visitors and the time it takes a company to implement a personalization strategy. Unfortunately, traditional personalization has failed on both fronts.

Luckily, both problems have essentially the same solution: a composable site architecture that makes implementing personalization faster, easier, and more extensible and puts personalization as close to your visitors as possible (See “Taking it right to the edge”), thus enabling pages to load at a blindingly fast rate.



The power of planning

The original rush to personalization was expensive, impulsive, and vastly over-promised. It's no wonder that companies have become skeptical. Surprisingly, the best place to begin implementing your company's personalization strategy is not on your servers but on paper. By taking the time to plot out your strategy even before you submit an RFP, you can avoid a lot of unexpected pitfalls and discover some additional needs, benefits, and refinements you may not otherwise have noticed until it was too late.

Starting at 35,000 feet

When it comes to envisioning your personalization strategy, speed mapping provides you with the lay of the land. It's a one-page template that is designed to capture your global vision, your immediate priorities, and your idea of what success will look like. In addition it gives you a place to acknowledge some of the challenges and to articulate a personal vision. Finally, it helps you to take stock of your current ecosystem, that is what components you already have available and in place, and to come up with a potential road map that lays out the phases you need to go through, beginning with a minimum viable product, to reach your ultimate goal. Squeezing all this information on to a single page not only makes a project seem more manageable and inspiring, but it can also make it clearer if there are any fundamental problems or weaknesses in your plan.

Defining your personalization strategy

Now that you've got a big-picture view in mind, it's time to zero in on some specifics. Uniform offers an in-depth Personalization Strategy Workshop that will walk you and some of your company's other key stakeholders through each important stage of the personalization planning process. Here's a brief overview of some of the elements involved.

The best of intents

Why do people visit your site in the first place? Why would they even want to? Here's a sobering thought. For a typical site, some 30-40 percent are what are known as "bounce backs." This means that when they get to your site, they leave. Immediately. So, if you're carefully crafting content for your site, keep in mind that only 60-70 percent of visitors are even going to bother reading what you've written.



That's why it's crucial to create content that answers the questions that brought your visitors there in the first place, that addresses their needs, interests, and motivations and convinces them to stick around. These reasons for visiting are known as *intents*.

To better illustrate the principles that make personalization possible, we created a fictional conference Web site called UniformConf that is aimed at developers and marketers who are interested in learning about and taking advantage of Uniform technology. Two of the key intents for visitors to this made-up site are to find out what the conference has to deliver for developers and what it has to offer for marketers.

Now, take a moment to consider the motivations that visitors have for coming to your site. When you are drawing up your own list of intents, think in terms of what your customers actually want and not what you *want* them to want. Intents should be realistic customer use cases not items from a marketing wish list.

Zeroing in on the top intent

Of course, not all intents carry the same weight. Take a look at the list of intents you've written down and see if you can rank them. The best way to determine the optimal intent is to find the one that generates the most visits and delivers the greatest business value. When possible, avoiding relying on intuition to make this choice. Use any user data you already have on hand to help you to come up with a decision. Once you have figured out your top intent, you should be able to come up with some signals that confirm it.

Looking for signals

Every intent has a number of potential signals. These are the tell-tale signs that enable you to make an educated guess as to why someone is visiting your site. Each new signal provides another piece of the puzzle, additional evidence that either strengthens or weakens that guess. Based on the top intent you have chosen for your own site, see if you can arrive at a list of potential signals that provide signs of this intent. Examples might include some of the following:

Real-time behavior. What sort of content are your visitors consuming in real time? If they're reading pages devoted to a particular product or service your company provides, for example, that may be a pretty good indicator of their intent to consider purchasing it.



Source. Another possible signal of intent is the sites your visitors just came from. If you run a site devoted to mayonnaise and your visitor just came from a site that sells bacon, lettuce, and tomato, that's probably a good signal that you've got a potential customer on your hands.

Marketing campaigns. Visitors may have come to your site as a result of a targeted e-mail marketing campaign. Simply clicking on that link provides a strong signal that a user has a specific intent.

Getting down to business

Now that you have both an intent and some signals, you need to map them to your company's business objectives. Think about which goals are key to your business executives. Which are they absolutely focused on? And how can you help by using personalization for the visitors who have the specific intent that you've written down?

For example, encouraging signups can lead to increased revenue. After all, signups are possible leads, and leads in turn are potential conversions. It may also be that personalization encourages more people to use self-service on your site, reducing your company's reliance on call center costs. In addition, personalization may be driving more engagement, which can conceivably lead to both an increase in revenue and an avenue for attracting new talent. Write down one of the key objectives for personalization based on the intent you have that would also match the metrics of your executives.

Making the journey

Of course, even visitors with a specific intent don't usually go from 0 to 60 in 5 seconds. They're unlikely to visit a conference site and immediately register. Instead, they undergo a gradual evolution or *journey*. It's crucial to anticipate the journeys your visitors are likely to make and to be with them every step of the way. Some typical journey stages may include awareness, research, validation, and engagement.

Taking it right to the edge

Edge personalization is one of the key things that differentiates Uniform from other personalization paradigms. When we talk about the "edge," we are referring to the server that is closest to your customer. The closer you are, the faster you can serve up pages to visitors.

Uniform's powerful approach allows you to bring the logic that is key to personalization as close to your visitors as possible.

Traditional personalization (also known as suite personalization) is "origin based." This means that even if it serves up pages from a widely distributed content delivery network (CDN), a global company may still have just one or two data centers around the world that it relies upon for personalization information.

Unfortunately, a system is only as good as its weakest component. Returning a request from that distant data center (which might be in another part of the world) takes valuable time. In some unlucky locations, the lag can be almost unbearable. Not only is this bad from a user's perspective, but it can also take the shine out of your company's overall Lighthouse score, pushing you even further down into the darker reaches of search engine results.



Reaching each destination

Once you've identified the journey stages for a particular intent, you can plot them out and map them to specific signals that indicate each stage has been reached. So, if we take our example of a visitor with a developer intent, those stages may be:

1. Initial awareness of the conference
2. Validation (“Is this something for me?”)
3. Registration for the conference
4. The actual experience of attending the conference

For developers who are thinking of attending our conference, we can measure their awareness by determining whether they are engaging with the content. Page views will help us to do this. If we want to know whether they're at the validation stage, evidence that they've read the descriptions for a variety of sessions can provide this. With the registration stage of the journey, the signal is an obvious one. If visitors register, we know without a doubt that they've reached this stage. And finally, for event experience, we'll know that they've achieved this important milestone when they've completed the agenda builder.

A framework for content

Relying primarily on a small set of important concepts and questions as well as a pen and paper, we have managed to build a solid framework for a robust personalization strategy. We understand intent, what we are trying to achieve, and we have identified the different signals and the journey stages. With this framework established, we are finally in a powerful position to effectively pop in the actual content. The content your visitors consume provides some of the strongest signals as to what their intents are. Of course, once again, a system is only as strong as its weakest component. Don't mix your developer and marketer content together, for example. Keep in mind that your signals are only as clear as the content you create.

An example from the edge

A user may be visiting your site from her office in Las Vegas, and even if the CDN has a node located in town, the site may still have to send out a request to a data center hundreds and perhaps even thousands of miles away in order to retrieve the data that it needs to personalize her page. The result is almost certain to be sluggish and unsatisfying.

With Uniform, personalization is as close by as the page itself. Pages serve up super quickly because the action occurs locally. The location where visitors are reading your pages is the same place where those pages are being served. Or, as the saying goes, “What happens in Vegas stays in Vegas.”

A blueprint for success

Now, with all the pieces in place, all you need to do is to make it happen. The work you've done in planning your personalization strategy, in defining the intents, the signals, the business objectives, the stages of each visitor's journey, and determining the content you need is 80 to 90 percent of the job. The last mile is actually doing it. And thanks to all the preparation you've done and the composable architecture you've chosen, that's the easy part!

