



POINT OF VIEW

Personalization begins with a solid blueprint



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May 19, 2020

At its core, personalization is about taking a general brand story and tailoring the delivery to specific customers. Personalization tends to work best when the brand can set a clear vision from the top; beginning with critical evaluation and alignment of brand objectives, insights, messaging, and ecosystem channel strategy. In this installment of our series on personalization, we explore in three steps how to begin developing a forward-thinking architecture for tailoring meaningful experiences with a Brand Blueprint.

Every good plan begins with a blueprint

We start by developing a flexible toolkit we call a Brand Blueprint to gather, critically evaluate, and streamline your brand's master strategic planning documents. The Brand Blueprint will become the backbone for architecting tailored customer experiences—in messaging, content, and driving desired actions for your brand. This centralized planning helps break down channel silos and unifies strategic focus from the start.

Looking for a high-level introduction to personalization? Check out the first installment of our series [here](#).



Building your Brand Blueprint

The business context surrounding your brand should serve as the backdrop to identify where gaps in knowledge exist, where assumptions need to be validated, or where historically powerful insights may be refreshed for the new competitive environment. Consider:

- ◆ Is your brand a challenger, niche, or category leader?
- ◆ Is your brand a multi-indication business or does it fit within a multi-brand portfolio?
- ◆ Where does your brand fall in its product lifecycle and category?

With these factors in mind, we recommend starting your Brand Blueprint in three steps:

1) Refresh the business fundamentals

Begin building your Brand Blueprint by resetting the business context. Start by revisiting the following to determine how personalization fits into your long-term growth strategy: segmentation and customer prioritization, where the share of your business is coming from, ATUs and competitive intelligence, new market drivers that may be influencing the category, and the ranking of objectives.

ROLE IN PERSONALIZATION:

Affirm the business strategy guiding your brand into tomorrow.



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2) Pressure test the customer journey

Take a deep dive into your customer. Vet insights, personas, and experience maps to identify your customer's key needs, motivations, barriers, and opportunities at each stage of their journey. Consider how changing dynamics like the emergence of telemedicine or the triage of care through mid-level providers might upend longstanding assumptions and lead to new brand opportunities. A deep understanding of the customer's mindset and behavior is a critical factor in the success of any personalization initiative.

ROLE IN PERSONALIZATION:

Map customer needs to deliver tailored experiences.

3) Plan a phased evolution of your messaging strategy

A comprehensive brand story shouldn't just map your brand messaging today, it should also lead to where you are headed. Planning with message evolution in mind helps develop personalization strategies that are nimble, which is especially important given the length of time these initiatives can take to implement. For instance, anticipate how forthcoming real-world evidence might bolster your data story. Consider how message priorities may shift when the value proposition changes after your biggest competitor goes generic. We believe aspirational message planning for major lifecycle developments over 12, 24, and 36-month periods helps solidify your brand's longer-term growth strategies, leading to major efficiencies down the line when you are ready to "activate."

ROLE IN PERSONALIZATION:

Build a future-focused messaging architecture that is enduring.

Let the connected ecosystem be the guide

It's much harder to piece together an omnichannel strategy than it is to build toward one from the start. Invest the time upfront to build a comprehensive Brand Blueprint that can become your long-term engine for delivering messaging that sticks wherever the next engagement takes place.

Let's build your Brand Blueprint together

Similar to building a house, a Brand Blueprint's foundation should be the last place you cut corners. Solidify your Brand Blueprint in order to set a clear strategic vision from the outset and select the right partner to help kickstart your brand journey into personalization.

The Evoke Center of Excellence on Personalization helps marketers approach the promises of marketing technology with clear, actionable, and human-centered solutions to tailored customer engagement. For more information, email us at business@evokegroup.com.