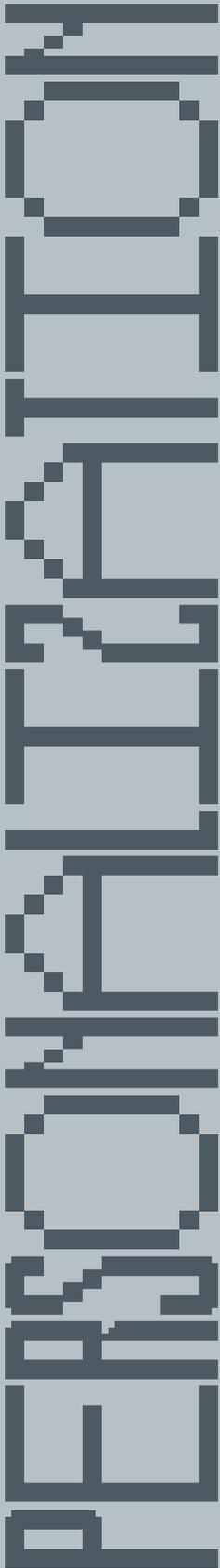


*White paper /*

# How to achieve personalization with enterprise WordPress

74 percent of marketing leaders report they struggle to scale their personalization efforts. This paper examines the role of personalization in the enterprise, and recommends technology solutions to implement or grow personalization capabilities.



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# Overview

As the audience of your website grows, it becomes more challenging to publish content that is relevant to all readers. Personalization gives the ability to profile each user's behavior and capture their preferences, allowing the display of more relevant content to keep them engaged, ultimately increasing conversions. However, according to Gartner, 74 percent of marketing leaders report they struggle to scale their personalization efforts. This paper examines the role of personalization in the enterprise, and recommends technology solutions to implement or grow personalization capabilities.

# What is personalization?

Personalization can mean different things to different people, but it mainly involves providing your audience with a more customized and engaging experience. It could refer to one or more of the following:

- Content that is specific to locales
- Curated content based on what a reader has viewed or liked in the past
- Users being able to share their own content with each other
- Registered users being able to follow specific people or topics to create a more relevant feed
- Content targeted to specific demographics
- Content based on predictive analytics or recommendation engines

# Why personalize?

Forrester found 80% of US consumers are willing to share personal details in exchange for a more tailored experience. Personalization empowers marketers to learn from user interactions, uncover new customer segments, and target them with campaigns. It also provides a framework to trigger campaigns automatically and provides the customer with the most relevant and engaging experience.

Personalization can also be used for ads, boosting monetization by improving click-through rates (CTR).

*Personalization empowers marketers to learn from user interactions, uncover new customer segments, and target them with campaigns—ultimately providing the customer with the most relevant and engaging experience.*

## Types of personalization

The personalization space continues to evolve, with new products frequently entering the market. Some of the most popular types include:

### Content personalization

Content personalization has a wide range. A series of landing pages could be set up that target specific customer segments, and surface more relevant links in these pages. Alternatively, specific content on the page could be displayed based on the interactions the user has currently had.

### Personalization platforms

Personalization platforms take personalization further, by feeding user interactions as data to train machine learning models. These models evolve with changes, both in the user's behavior as well as the content available on the site. They are a great tool to uncover audience segments and understand them better.

### Geo-specific content

Successful digital properties are visited from all over the world. However, as a site's audience grows, it might become challenging to provide content that is engaging to users from all around the world. Providing geo-specific content is one of the most popular use-cases of personalization.

### Audience segmentation

A more feature-rich version of demographic-segmentation, audiences are organized based on multiple indicators and they are served the content that is most relevant to them. However, the overhead of creating lots of custom experiences can easily turn into a performance issue, as the size of the site could grow exponentially.

*Taking into account the following considerations, product owners, developers, and legal/compliance teams can all help inform the best personalization path to meet your goals.*

## 5 things to consider when choosing a personalization platform or tool

Before diving into using the most popular solutions for personalization, there are a few critical questions to ask, regardless of the type of personalization at play.

Cross-functional collaboration is key at this stage. Successful personalization requires marketers, technologists, and business leaders to have shared goals, with a firm understanding of how pursuing personalization will affect each area of the business. Taking into account the following considerations, product owners, developers, and legal/compliance teams can all help inform the best personalization path to meet your goals.

### 1 / How will the data be shared with existing systems?

If the personalization requires any data to be sent to a vendor (for instance, user data, activity data, etc.), a JavaScript snippet will need to be included in all pages. Be sure to choose a reliable third-party vendor, as slow response times on the vendor end could affect the site's end-user experience, and a data breach at the vendor could expose customers' information.

### 2 / What will be the reliance on external systems?

As recommendations for a specific type of user may change, the recommended list of content is typically sent dynamically from the personalization vendor's systems. Some vendors store the user's behavior in a cookie so that users don't have to rely on their service being online. Ensure they have a strong uptime/availability record and make sure to understand what features of the site (if any) will be impacted if the service vendor's systems are unavailable.

### 3 / How can sharing personal data be kept to a minimum?

If users are required to sign in with their account, there is the added advantage of using their user-specified preferences. However, this would require additional information to be shared with the personalization vendor. Ideally, it's possible to share just the username or a unique identifier for the user.

### 4 / How can personalized experiences be shared across channels?

To capture a user's data across various channels (social media, email, mobile apps, website, etc.), the vendor will need to unify data to a single user profile (typically based on the email address). Most personalization vendors that support cross-channel data gathering will also allow recommendations to be published through any of these channels.

### 5 / How will the customer profile integrate with existing marketing tools?

Insight into customers' profiles allows specific segments to be targeted with special offers or promotions. To use existing marketing software, it's imperative to have it integrated to the personalization engine. Alternatively, campaigns could be managed within the personalization vendor's portal.

# Getting started

*Start with a foundation that will provide the flexibility of using a variety of products without being locked into a single solution.*

## Minimum feature requirements for vendor selection

Unless moving forward with an all-in-one personalization vendor, start with a foundation that will provide the flexibility of using a variety of products without being locked into a single solution. At a minimum, make sure each tool you choose can support:

1. Content targeted to specific demographics
2. Content based on predictive analytics or recommendation engines

### Tracking registered users

While mapping and tracking user behavior (or implementing an Identity Management solution) doesn't provide personalization on its own, it provides the foundation to understand who the site's customers are. Most mature platforms will allow customers to be identified regardless of the device or channel they are engaging from, allowing a consistent message across a diverse platform. While there are vendors that focus solely on this component, most personalization platforms provide this as a base feature.

Having registered users provides the simple but effective option of requesting user preferences and using it to provide a specific content. A simple example would be to categorize content based on different user profiles and to display only the relevant content.

### Tracking both registered and anonymous behavior

It's possible that the information captured during the registration process is no longer relevant and the user is no longer finding their personalized content engaging. It is also challenging for a digital property that targets a wide variety of users to provide enough relevant content to entice a user to register.

Tools such as Optimizely help cover this gap by tracking user behavior on the site. Whether the user is logged in or anonymous, their interactions can be used to determine what the recommended ads or articles will be.

To add a simple 'Related Posts' section to your website, Jetpack's related posts feature may be all that's needed. It uses Elasticsearch to analyze the content and understand its relevance to the rest of the website. The display of recommendations can be fine-tuned using customization options.

*Engineers recommend several trusted tools to enable secure and performant personalized experiences.*

## Personalizing WordPress

The selection of tools, platforms, or mechanisms ultimately depend on each organization's personalization strategy and goals. Below is a selection of several tools to enable secure and performant personalized experiences.

### Content personalization

The familiar 'you might also like' or 'customers who bought this also bought' features are data-driven recommendations. These dynamically shortlisted links are more relevant to users and have a higher click-through rate. One simple example is Automattic's Jetpack plugin, which offers a related posts feature that provides data-driven recommendations.

### Personalization platforms

Sailthru and Piano are both leading providers of personalized experiences. Sailthru provides a variety of algorithms to choose from, and Piano's Composer has an intuitive interface to create and target market segments.

### Geo-specific content

Geo-specific targeting works by looking up a visitor's IP address on a GeoIP database to determine their location. The accuracy of this data depends highly on how updated the GeoIP database is. Most enterprise hosting providers will provide an ISO 639 compatible language code for site visitors, which can be used for further customization.

If the site's hosting provider doesn't support this feature, a Content Delivery Network (CDN) such as Akamai or Fastly can be used.

### Audience segmentation

To help multiple versions of the site scale, the some platforms supports cache segmentation, allowing all of the different versions of the site to still be cacheable. Alternatively, third party CDNs such as Akamai and Fastly provide similar audience segmentation tools. Email marketing tools such as MailChimp also support audience segmentation, allowing a targeted message to be consistent across all mediums.

# Afterword

Personalizing your site ultimately uncovers the different segments of your audience, allowing marketing teams to create more relevant offers and promotions. The wide variety of tools gives the flexibility of either implementing a simple one-off feature or diving into a comprehensive feature-rich personalization platform.