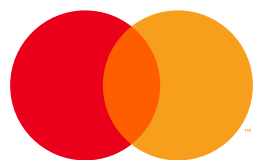


# PICKING A PERSONALIZATION VENDOR WITH CONFIDENCE

56 questions you need to ask  
before making a decision



dynamic yield.



dynamic yield.

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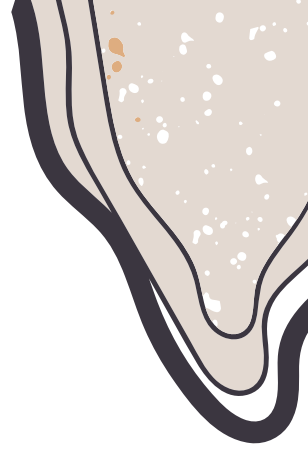
# NOT ALL PERSONALIZATION SOLUTIONS ARE CREATED EQUAL

As tailoring experiences to the individual has become strategic to every brand, we're witnessing a host of technology vendors crop up promising to deliver on this approach to the customer journey. However, in a race to meet the demands of personalization, many solutions not built from the ground up with its unique applications in mind either end up getting cobbled together through a series of acquisitions or address only a handful of pain points.

A select few incorporate the capabilities to serve highly-targeted interactions – the kind that actually increases a company's bottom line. So whether considering personalization for the first time or moving beyond basic implementations into more sophisticated deployments, employing the right personalization provider is incredibly important to a program's success. Not only to ensuring those initial marketing dollars are well spent, but also that results are generated in a sustainable, scalable fashion.

This guide is meant to remove any uncertainty in the vetting process, arming teams with the knowledge they need to make informed decisions with regards to the personalization technology market.

# THE BARE NECESSITIES



Enterprise-grade personalization involves several moving parts, requiring brands to connect, consolidate, analyze, and activate their data in real time. Though, this can only happen when the following technological components are present at the core.

**Unified dataset.** Information from every touchpoint along the customer journey must be made available to create a single source of truth from which to take instant action. Therefore, businesses employing several point solutions in the marketing stack should consider replacement with that of a holistic personalization platform, as essential data from these tools often get stuck in silos, making it nearly impossible to leverage.

**Open architecture.** Integration with various tools from the marketing technology stack, no matter what the vendor, should happen seamlessly to enable powerful personalization use cases. A high level of flexibility can reduce engineering time and generate a significant amount of value in new profit by accelerating a business' rate of deployment.

**Decision logic.** Automation of analysis and delivery are necessary to increase efficiencies, scale operations, and ensure each customer receives the optimal experience. As the number of tests, variations, and segments increase along an experimentation roadmap, assessing the impact becomes an incredibly data-heavy task, a feat which can only be scaled with machine learning.

# THE HARD QUESTIONS



Personalization technology selection means knowing what to look for and how it's going to deliver on business goals. With so many possible implementations and a great deal of variation between the capabilities each can provide, getting answers to the questions below is absolutely critical to moving forward in conversations with a vendor.

Once the full extent of their capabilities are known, a proper evaluation can be conducted with all relevant stakeholders involved, including marketing, engineering, product, and analytics. After which, suitable options should be strongly considered and weaker ones eliminated.

# SEGMENTATION

## DATA COLLECTION, CONSOLIDATION, AND MANAGEMENT

### **1. Are your audiencing and segmentation capabilities based on real-time data?**

Consumer tastes continuously evolve, meaning the system you employ for personalization needs to consolidate and synchronize audiences and segments as they interact with your various digital properties. Whether from web, email, mobile app, etc., information must be allowed to be viewed, managed, and analyzed to identify valuable segments and take immediate action. In addition, audiences should have the ability to be exported and utilized in other platforms.

### **2. Can I create segments based on affinities to certain attributes, like price, color, etc.?**

Combining data about user interactions with the attributes that characterize items yields valuable insights into understanding user preferences on an individual level. A vendor can and should leverage this behavioral data to build and target rich, multi-dimensional affinity profiles for each user – ask them about how these are scored and refined over time. In addition, make sure that every affinity-based segment is easily targetable with simple conditions and rules.

### **3. Will I be able to onboard and merge first- and third-party data from my CRM, ESP, DMP, and so on?**

Personalization is only as good as the information it's fed, and a robust solution can ingest data from various sources, no matter the type – including audiences and segments created in other platforms. This allows for it to flow freely, in real time, establishing a cohesive data set based on all available customer information which can then be used to produce powerful, contextual experiences.

### **4. How do you help me personalize the experience of visitors who are new to my site and brand?**

You invest heavily in attracting new visitors to your site, and you need to ensure they have a relevant experience once there. Though you don't have an established history with them, there are data opportunities you can leverage to create a welcoming experience for anonymous visitors. For example, third-party audience data from DMPs can be used to create custom targeting combinations to present the right content to a particular segment.

Additionally, referral information, geographic data, as well as browser and device type, provide tremendous insight into each visitor's purchase intent, interests, and brand preferences for use in personalization. Make sure you get a full understanding of the data opportunities each vendor provides, and that contextual data like current and forecasted weather are readily available for instant targeting.

## **5. Do you allow me to easily study audience trends in my data?**

This part of running a personalization program can be time-consuming, and for marketers to increase experience velocity, they require an interface that allows them to analyze audience data as quickly as possible. Look for a vendor that will seamlessly let you identify, or rather, predict and compare valuable segments, particularly those that present an opportunity to drive more conversions, without excessive analysis.

## **6. How much control do I have over my data, and will I be able to access it outside of the platform?**

Personalization spans multiple touchpoints and channels, making data democratization absolutely critical to delivering highly tailored interactions. Therefore, businesses need full control in the management of data and how it's implemented. Vendors should not only allow for the easy import and export of data to be used across other BI tools, but also provide APIs for interfacing, querying, and feeding information in their database to other systems.

## **7. Does your solution capture all customer interactions with my site? What, if any, limits apply?**

Customer interactions with businesses online are complex and full of nuance; long hovers over content may indicate strong interest, while sporadic scrolling and sharp mouse gestures may indicate confusion and stress, calling for two different types of experiences. Many vendors claim to pick up, collect, and enable acting on any type of customer interactions and data, but it is important to verify how much of the data collection is actually powered out of the box, and how much requires high effort customization. In addition, customer affinity data must be supported for any type of product attribute to power precise affinity-based targeting. Find out if the tech provider can capture and store all customer data, as well as provide you the tools to target against it.

## **8. Do you comply with GDPR and how does your solution meet global regulations when it comes to data protection, privacy, and security?**

As lawmakers, businesses, and individuals become more critical of how personal data is collected and used, website owners should be incredibly selective about the vendor processing their data, contracting only with those who take data protection seriously. Ask for a detailed list of requirements as it pertains to GDPR, ISO 27001, and ISO 27018 as well as how they meet the various guidelines outlined, and whether or not your data will be protected under the Privacy Shield.



# TARGETING

## GRANULARITY, REACH, AND CONTROL

### **9. Can I target visitors across every one of my digital touchpoints, including mobile app and email?**

The modern customer journey is never limited to a specific touchpoint or channel, but rather encompasses numerous interactions, whether it happens at a brick and mortar store, by email, or through a digital kiosk. The purpose of a personalization platform is to tie all of these moments together and then deliver relevant and consistent experiences at every turn. Furthermore, the platform must be able to identify and programmatically target the same visitors across the distinct channels – if it can't, it's simply another point solution for data to become fragmented and siloed. A vendor must do more than personalize at particular touchpoints and trigger experiences based on specific events.

### **10. Does your platform power triggered content across the web, email, and mobile apps?**

While personalization relies heavily on tailoring experiences for customers who are proactively interacting with your brand, a strategic part of your technology mix must include acting on important signals and behaviors that your users demonstrate, in a timely fashion. Make sure a robust triggering engine is in place to automatically send personalized content, emails, and push notifications based on critical customer behavior, such as site and cart abandonment, price drops, and more.

### **11. Will I be able to deliver any type of content to support an end-to-end customer experience?**

As you conduct your due diligence to make sure every channel is supported, it's important to remember that experiences come in many shapes and forms, regardless of the channel. For example, an email can include dynamic content, optimized links, as well as product recommendations. So when evaluating channel support, you'll want to validate not only the available delivery methods but also the potential content types, e.g. rich push notifications, test variations, display ads, etc., in addition to those mentioned above.

## **12. Can the platform identify the optimal targeting setup to drive the most uplift in revenue for each segment?**

Properly executed data-driven personalization relies on segmented website traffic, numerous test deployments with conclusive results, analyzed data, and measurement of every tested variation against each audience segment to determine optimal programmatic targeting rules. But with the power of artificial intelligence, algorithms can work to continuously analyze and identify opportunities for existing or new experiences to serve the most relevant content for each audience segment – across any channel, including web, mobile web, email, advertising channels, and apps. Find a vendor like this to rid your team of tedious data analysis tasks.

## **13. What are the different targeting conditions and types of data I can use to personalize experiences for my visitors?**

When evaluating the capabilities of a personalization platform, it's important to account for the targeting logic at your disposal. Visitors often wear multiple masks, alternate between mindsets, and constitute distinct personas. It is therefore important to ensure you can programmatically target your visitors based on contextual data, such as the current or forecasted weather conditions, geographic data, demographic data (spending power, household size, etc.), lifetime value data, loyalty data, behavioral patterns, and both implicit and explicit user-affinity data that denotes your customers' specific preferences.

# TESTING

## STATISTICAL ENGINE, ROBUSTNESS, AND PARAMETERS

### **14. Can everything be tested? Can I control all elements of the test?**

Many vendors offer a variety of capabilities and add-ons, but these will often function as black boxes without allowing you to experiment and test between competing methods of execution and strategies. Advanced personalization is all about experimentation, regardless of what's being tested and whether it is controlled by the marketer or a machine learning decisioning engine. Therefore, it is important that full testing tools and capabilities function as the foundation for every type of experience. Whether you're editing an email subject line, deploying a certain recommendation strategy to a segment of interest, or altering the page layout for several users – every change should be fully tested with a robust testing engine.

### **15. What type of statistical engine is employed? How robust and accurate is it?**

The industry is moving toward the Bayesian statistical analysis of data as it is a simpler, less restrictive, more reliable, and highly intuitive approach to A/B testing. This type of engine also offers the capability to determine each test variation's statistical Probability to Be Best (P2BB) with high accuracy, and supports both binary objectives like conversion rate and CTR, as well as non-binary objectives such as revenue. The framework provides teams with a quicker and more robust statistical engine.

### **16. Does the vendor offer full flexibility and control over every parameter of the test?**

Every test has different requirements to yield reliable, accurate, and actionable data. The distinct requirements depend on the nature of the test, the traffic volume exposed to it, what the objective is, and whether it is imminent or delayed, and more. Therefore, a reliable testing tool must adapt and allow the marketer to control every parameter of the test. This includes the attribution window (time allowed to attribute a user's success metric/conversion to the exposed variation), objective (CTR, engagement, revenue, conversion, or any custom event), variation stickiness (exposing a user to more than one variation within a specific timeframe), and the statistical significance level required to declare results.

## **17. Can the platform automate any aspects of the testing process?**

Properly executed personalization requires numerous deployments with conclusive results, analyzed data, and measurement of every tested variation against each audience segment to determine the optimal programmatic targeting rules for an experience.

Therefore, businesses need to be able to conduct and manage experiments in a way that doesn't become too complicated. Ask vendors how they can improve workflows and increase efficiencies – specifically if they can augment decision-making around test parameters, traffic allocation, and next-best-action with machine learning and AI.

## **18. How do you handle outliers in my data?**

Huge deviations in site behavior can lead to unintended consequences in your A/B testing campaigns. For instance, if a random user makes a one-of-a-kind purchase, you wouldn't want that abnormal activity to contribute to a variation's success as it would lead to a false score.

Therefore, if you don't want to leverage data that does not reflect normal site behavior to predict the future outcomes of an experiment, find a vendor that can detect and filter out these extreme events.

## **19. Do you support funnel testing?**

The testing world is ever evolving; where at one time an A/B test was limited to an element on a page, practitioners today are required to test multiple combinations of different content types and permutations of variations, often spanning different touchpoints and pages. Such tests entail heightened requirements to ensure campaign consistency, i.e. you must be able to determine that if a certain experience was viewed on the Homepage, a corresponding version appears at other stages in the funnel, including across other channels and touchpoints. When evaluating a vendor, confirm that multiple variations of full funnel journeys can easily be tested.

## **20. Can I personalize the way our site is laid out based on individual customer preference?**

There is no uniform site structure that can provide an optimal user experience to each of your visitors – it should, therefore, change based on a specific visitor's activity and context. Smart personalization technology allows teams to tailor the look and feel of the layout to best suit the individual's needs at any given moment in time. A select few also offer advanced WYSIWYG interfaces, allowing non-technical users to carry out these elaborate layout changes without dependency on IT.



# AUTOMATION

## ALGORITHMS, MACHINE-LEARNING, AND AI

### **21. Does your platform automate the traffic allocation of an A/B test?**

A vendor who leverages machine learning and AI can test every aspect of an experiment in real time, continually collecting user data and signals for automatic traffic allocation to the best possible variation for that particular segment at any given moment. Ask about multi-armed bandit algorithms and whether or not their solution can go beyond classic A/B/n testing.

### **22. Will you help me identify the best experience for each visitor or segment?**

If you have determined a prospective vendor is able to provide you with vast testing capabilities, make sure they don't simply optimize for the "average user." Those who offer contextualized testing not only determine the most appropriate variation for all – they determine the best performing variation for each user segment; and those even more advanced determine the winning variation to present to each user, which can be of extreme value to marketers.

### **23. Can the best products and content be recommended to each visitor automatically?**

Testing, personalization, and recommendations capabilities are regrettably not always offered by the same vendor, despite their inherent relationship. Therefore, if you want to personalize the complete customer journey, make sure you invest in a personalization solution that relies on the same set of customer data. That way, it will be able to better automate the delivery of highly engaging experiences across touchpoints, whether choosing a specific piece of content out of a limited number of variations or recommending items from a vast product catalog with thousands of entries.

### **24. Are you able to automatically predict a user's probability to behave in a certain way?**

Analyzing experiment results and segmenting behavior can be a cumbersome task. As technology advances, artificial intelligence models are emerging, opening the door to newer and smarter ways to interact with your customers. For example, a vendor might automatically identify a segment who may be at high risk of churning or are likely to be big spenders. Even further, it will be able to recommend courses of action for specific audiences of users, saving your team endless hours of work and resources.

# STACK

## SERVER-SIDE, API GATEWAY, AND DEVELOPER TOOLS

### **25. What types of implementation methods do you employ?**

Every organization is different, so finding a vendor that is flexible enough to work within your current architecture is of the utmost importance. Whether via a client-side script, server-side rendering, through APIs or a hybrid approach of any of the above, it should be easy for various members of your team to deploy personalization in a way that works for you.

### **26. Can you power personalization beyond traditional channels and across emerging technologies?**

In an increasingly connected world, Product & Engineering is now collaborating in tandem with Marketing. These teams need to be able to aggregate data across solutions within the technology stack through a server-side implementation to deliver custom individualized experiences into connected devices, voice assistants, call centers, kiosks, or in-store devices. Only a vendor with API access will give companies this level of control and freedom to take their personalization programs to the next level.

### **27. Do you offer developers tools to manage and control the customer experience?**

To effectively inject custom-made experiences at every single digital channel and customer touchpoint, developer toolkits, server-side APIs, and SDKs are absolute necessities. A robust API library means developers can tweak, retrieve information, and interface with a vendor's system without being limited to their user interface. From unifying data stuck in silos to interacting programmatically with the organization's vast array of information sources to further embed personalization into the customer experience and user-level data sharing into third-party platforms – the best solution provides full control in the management of data and how it's implemented within a personalization program.

# OMNICHANNEL

## AUDIENCES, TOUCHPOINTS, AND ORCHESTRATION

### **28. Does your platform offer real user identity reconciliation across devices?**

To achieve true omnichannel personalization, you must first be able to create a 360 degree/ single view of the customer. This requires connecting identities across channels, devices, and apps based on the activities of an individual customer, often with an unknown identity. Therefore, a vendor must be able to reconcile and map information, including hashed emails, full names, phone numbers, addresses, device IDs, and more for a unified customer profile. Once merged, one must be able to orchestrate and target the same user across multiple touchpoints in real time while maintaining a consistent experience.

### **29. Is data sharing between my properties, domains, or sites possible?**

Whether you work in multiple development environments, own numerous domains, or manage a variety of different platforms - including mobile apps, web, or email - any experience and audience you create in one area should be made easily transferable and targetable in the other. This ability to copy campaigns, share audiences, and more easily control your data is what allows for the seamless omnichannel targeting behind true personalization.

### **30. Can I orchestrate a coordinated experience across pages and touchpoints in one cohesive campaign?**

A vendor should offer the ability to group multiple experiences within one overarching experiment instead of forcing them to optimize individual touchpoints and interactions. For example, testing one group of experiences as “Free Shipping” versus another with “10% Off” across the homepage hero banner, website overlays, social-proof messages, and emails. This not only ensures a consistent customer journey from start to finish but also allows a business to understand the impact of specific experiences across the entire user funnel.

# RECOMMENDATIONS

## MERCHANDISING, STRATEGIES, AND LOGIC

### 31. Are you able to set different strategies to different users?

Visitors are influenced by several factors when deciding to purchase a product. Therefore, effective recommendations for one customer may not be for another. Knowing this, it's critical for brands to leverage all available data at hand - including affinities, behavior, demographics, and many other circumstantial signals - to deliver the optimal recommendations to each customer at every crossroad. During evaluation, make sure journey-aware recommendation strategies are provided – mature vendors should offer a variety of global strategies such as “trending now,” “most popular,” etc. to contextual ones, like “goes great with,” “similar items,” “bought together,” etc., as well as personal, which are recommendations based on every user's affinity profile or collaborative filtering.

### 32. What is the logic behind your “personalized” recommendation strategies?

Personalized recommendations can be based on several models, the first of which is collaborative filtering, an approach that combines each user's product interaction with the interaction history of all other users on a site. Through the collection and analysis of massive datasets on user behavior, information is then mined to predict who will purchase what. A necessity for any vendor, collaborative filtering allows brands to enable serendipity shopping for their consumers by presenting items they would not have necessarily sought to purchase. A second approach is to consider the sole affinities of every individual, tailoring custom product recommendations based only on the individual's exhibited - both implicitly and explicitly - preferences without consideration of lookalike customers. Make sure your vendor can offer you the advanced personalized recommendation strategies your customers require.

### 33. Where can your recommendations be implemented?

Recommendations are relevant throughout the entire customer journey, and therefore should be deliverable anywhere, including across the website, mobile app, advertising campaigns, email newsletters, landing pages, social media, direct mail, and even “offline” via sales representatives in-store. A vendor should be able to account for all of the above, so make sure they can check these boxes during the evaluation process.



### **34. Which elements of my recommendations do you allow me to A/B test and customize?**

Every pixel devoted to product recommendations should be open to experimentation, including the design, layout, interactivity, merchandising rules, strategies, product titles, badges, callouts, number of slots, and more. Ask about whether these various elements are customizable, testable, and targetable as a part of a vendor's recommendations solution. Bonus points if this can be done quickly and efficiently without requiring IT.

### **35. Does your recommendation engine take into inventory, demand, and popularity into account?**

Inventory changes by the second in direct correlation with demand and popularity, and recommending a product that is out of stock is a beginner's mistake you want to avoid making. It is critical, then, to employ a recommendations engine that understands the state of your physical inventory at all times, leveraging information about popularity to either highlight scarcity, display social proof, or deprioritize certain products as time goes on. Ask vendors about their integration methods with your product catalog, the size it can support, whether it syncs in real-time, how often it updates, and more.

### **36. Is your recommendation engine compatible with multiple industries, i.e. media, retail, finance, etc.?**

The revenue opportunity associated with recommendations is not limited to retail. Every online experience, whether from a media company, travel brand, or financial institution is fertile for recommending complementary content, products, or services tailored to every user's preferences and intentions. A well-rounded recommendation engine is adaptable, taking into account the unique requirements and specifications of each industry. For example, by considering evergreen content for publishers, syncing with hotel room availability, and more. Whatever the case, make sure the vendor you select can address your use cases adequately.

### **37. What level of control do you provide merchandisers?**

Algorithmically-driven merchandising allows you to automate and optimize strategies at scale, but your merchandisers and editors also have a great deal of expertise that should be leveraged and implemented through manual control when required. A recommendation engine must be flexible, offering automation while also supporting manual merchandising rules, such as being able to pin a specific item, include or exclude a particular set of products from the automated recommendation results, assign different strategies and rules per slot, configure priority, and more.

### **38. What feed size do you support?**

Every vendor has its own thresholds when it comes to different feed sizes – whether 20K, 200K, or 1M+. Find a solution provider that can fully ingest and handle all of your product SKUs to power recommendations and user affinities. If you want to leverage all of your inventory data by uploading multiple product feeds within a single account, make sure this is also supported. Finally, fast feed processing time is critical to ensuring your rendered recommendations are always up-to-date when uploading or synching product feeds.

# MESSAGING

## TYPES, CHANNELS, AND TRIGGERS

### **39. Will I be able to serve targeted overlays and notifications at any point in the customer lifecycle?**

A high-impact messaging strategy will speak to each individual's context and drive action across web, mobile, and app. To accomplish this, teams will need to be able to target visitors with overlays like welcome messages, countdown timers, gamification popups, and more based on real-time behavioral and contextual data. Alternatively, serve notifications dynamically, such as floating bars, subscription widgets, coupons, etc. – tailored to different user segments. Look for a vendor with strong messaging capabilities if you want to effectively drive engagement and revenue at critical moments throughout the customer lifecycle.

### **40. Can I trigger personalized messaging upon key events, such as exit-intent behavior, scroll-depth, purchase events, and more?**

Trigger marketing is a powerful tool that every marketer should have in their arsenal, allowing for the automatic delivery of messages based on an individual's behavior, actions, or any other important signal. Ask a vendor which channels you can trigger communication through, if there are any limitations as to what you can define as a custom event, and whether or not they offer open-time content/product recommendations.

### **41. Do you embed content or product recommendations in overlays and notifications?**

Because recommendations are an essential part of a marketers toolbelt, they should be available for placement anywhere on the site, including within overlays and notifications. Embedding them in messages can improve readership, recover sales from abandoned shopping carts, and bring returning users back to context. If a vendor is limited in the number of recommendation units it can provide, consider the opportunity cost of not capitalizing on high-yielding pieces of real-estate such as overlays and notifications.

## **42. Does your platform deploy urgency and demand-based messages like social proof?**

Showcasing high customer demand for a product, like the amount of views, adds-to-cart, or purchases conducted within a certain time period, is a proven method for boosting sales. Customers naturally find comfort in a greater collective, and if you can create the impression everyone is buying your product (social proof), there's a strong likelihood they will too. Hence, you'll want to enlist a vendor with the capability to surface real-time notifications based on user activity – including low-in-stock messages, location-based view counters, or trend alerts – to create urgency and influence decision making.

# REPORTING

## METRICS, FILTERS, AND INSIGHTS

### **43. What are the different types of reports you provide?**

Personalization vendors can manage many types of data - from what's collected by the solution out-of-the-box and via the custom events and triggers established, to information onboarded from other platforms, as well as campaign performance data. When evaluating a vendor, examine the types of reports offered for each task at hand, whether you prioritize A/B testing, recommendations, personalization, or optimization, and make sure your team finds their reporting capabilities insightful and actionable. Furthermore, make sure that each report is updated in real time as opposed to reflecting day's old data. Also, the option to export raw data from each report into structured CSV files can be necessary to drill down on results in other tools.

### **44. Can you filter your reports and add multiple dimensions?**

It is imperative a vendor can filter reports by segment, even if your test may not be segmented at all. This reporting mechanism will allow you to identify segments for whom certain test variations had either starkly positive or negative impact. Often surprising results, such as when a “losing” test proves to be a winner for particular traffic segments, can be lifted during performance analysis. Don't miss out on actionable insights like these that can jumpstart your personalization practice.

### **45. Does your platform allow assigning a “global” control group for all personalization activity and experimentation?**

Measuring the impact of your personalization program isn't always straightforward – multiple campaigns and experiences targeted at alternating audiences across many of the same pages can make it difficult to attribute uplift to a specific campaign or calculate overall ROI, especially when it comes to cross-pollination. Instead of creating separate control groups for each test, a “global control group” feature will allow you to define and set a constant segment of traffic apart from all of your personalization activity. This is paramount to truly evaluate not only the performance of your program but also the tool you use to manage it.

#### **46. Am I able to examine your experiments across any time period and see overall campaign performance on a timeline?**

Scientifically valid tests must adhere to strict rules, wherein any change made to a variation can alter its validity and mandates resetting the test. Due to this common scenario, marketers require a view which enables them to examine every test version and variation version, as well as the overall campaign, from the moment it was launched to its current status. For this reason, the vendor must provide a flexible way to analyze your test's performance over time.

#### **47. Which KPIs do you offer to measure the impact of my campaigns?**

You should always have a clear view of how your business critical metrics are performing, which might include conversion rate, purchases, revenue, revenue per user, average order value (AOV), pageviews, pageviews per user, and more. A vendor with strong reporting capabilities will allow you to customize and effectively track each of these KPIs against an experiment, some even letting you layer in secondary metrics to help identify how a variation or experience impacted other KPIs.

#### **48. Can you compare the performance between audiences in a side-by-side view?**

Analyzing data to identify and define traffic segments can be a cumbersome task, so having a tool to instantly highlight the potential impact each group poses can translate into a lot of time saved and better insights gleaned. Look for a vendor offering a side-by-side view of your audiences so you can more easily compare who's engaging with your brand. If they do, you'll be able to better prioritize the right ones along your testing roadmap.

#### **49. Do your reports offer next-best-action recommendations?**

Teams invest a lot of effort ideating, building, and launching a test. Then the results come in and they might not entirely be sure what to do next. AI-driven personalization solutions are required to provide added value by crunching and analyzing important data for you, surfacing insights and recommendations on what the next best course of action is, whether it's to target certain variations at specific segments or apply the winning variation to all of your traffic.

# IMPLEMENTATION

## ONBOARDING, INTEGRATIONS, AND SUPPORT

### **50. Will your platform connect and interface well with the rest of my ecosystem?**

A vendor should be compatible with various content management systems, eCommerce platforms, ESPs, DMPs, third-party providers, and so on, as well as offer easy integration with all of the tools you already use. Look for a solution with flexible data architecture and open API to accelerate implementation, allow data to flow more freely across your stack, and to increase the rate of deployment when it comes to launching personalization campaigns.

### **51. How long, on average, does it take to onboard the platform?**

Personalization solutions can offer a very broad variety of capabilities, oftentimes entailing a complex implementation process. However, mature vendors will have consolidated their technical architecture to expedite and reduce the implementation burden, narrowing the process down to a few technical steps. In addition, a wide selection of plugins and integrations should be baked in to allow for seamless connectivity with just a few mouse clicks and secret keys. Be sure to weigh the value of the capabilities you are gaining with the effort and cost it'll take to get the software up and running, and do not commit to any platform requiring more than a month to onboard.

### **52. Do you offer a dedicated onboarding support team to see us through a successful implementation?**

Technology is often only as good as the team who supports it, and yours will usually require a certain level of hand-holding and training during the first couple of months. Beyond that, CX consulting may be needed once the onboarding phase is over. Ask whether you'll have access to experienced analysts, personalization experts, and skilled engineers throughout your relationship with the vendor. Also, a reasonable SLA shouldn't exceed 24 hours during onboarding, or 48 hours ongoing.

# EASE OF USE

## MARKETER CONTROL, FLEXIBILITY, AND WORKFLOWS

### **53. Does your platform provide “WYSIWYG” features?**

By definition, A/B tests, optimization campaigns, and personalized experiences all consist of visual elements. These are usually made up of markup and coding languages that require knowledge in HTML, CSS, and JavaScript, all of which can burden your technical team and stunt your velocity. It is because of this, marketer-friendly tools are becoming an industry standard. Verify the vendor you procure has a visual editor, drag-n-drop controls, and point-n-click capabilities that make it easier for you to create rich visual experiences without any technical resources. This will ensure your marketing team regards the tool as an empowering resource and not an obstacle.

### **54. Is there complete flexibility in determining which goals and events we track?**

Personalization engines generally allow you to customize tracking strategies (e.g. user logins, newsletter signups, content consumed, pages viewed and purchases). Some allow you to track customized behaviors, such as exit intent, scroll speed, etc. Engage a vendor that doesn't limit you to a pre-defined number or set of tracking and optimization strategies and can accommodate your needs.

### **55. Do you have standardised workflows and experience templates to help us scale experience delivery?**

Oftentimes, achieving priority for campaigns over other projects and then orchestrating between various stakeholders can be a major obstacle for marketers who want to start delivering personalized, engaging experiences on a consistent basis. By allowing teams to templatize their efforts, the trap of typical design and development cycles can be avoided. With pre-built experiences, new campaigns can easily be adjusted and set live instead of starting from scratch or waiting for resources. Find a vendor that comes ready with an out-of-the-box offering such as this – bonus points if it lets you repurpose content your developers build to use as custom templates.



## **56. How easily can you coordinate between different experiences and control priorities and sequences?**

At any given time, you may have multiple experiences running, each with their own targeting, content, test rules, and objectives. In order to control who sees what and when, you'll need an easy way to prioritize experience delivery. For example, if a visitor meets the conditions for more than one targeted experience (e.g. Men or Returning Visitors), the one with highest priority will be served. If a visitor doesn't meet any of the conditions, the default experience will be served. Ask a vendor if they provide a feature such as this to ensure your experiences are ordered properly.

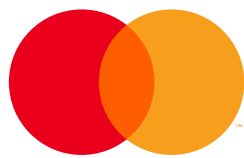


# YOUR CX IS ONLY AS GOOD AS THE PERSONALIZATION PARTNER YOU KEEP

While the right fit is heavily dependent on a vendor's capabilities, many other important factors impact the decision to ultimately opt for one provider over another. Like whether or not the same vision for personalization is shared, a company's future needs align well with the current product roadmap, proven use cases are available to demonstrate expertise in a given industry, and that the resources and infrastructure exists to support a growing program.

Technology is merely a vehicle through which customer experiences are formed. A true partner in personalization has the power to transform entire digital strategies, augmenting efforts in the development of new ideas and implementations, establishment of workflows and processes, analysis and refinement of campaigns, as well as the advancement of innovative initiatives.

The more informed about a vendor and how it operates, the greater the potential an original investment in personalization will be returned, and more importantly, produce dividends.



# dynamic yield<sup>®</sup>

**Dynamic Yield** is an AI-powered **Personalization Anywhere™** platform that delivers individualized experiences at every customer touchpoint: web, apps, email, kiosks, IoT, and call centers. The platform's data management capabilities provide for a unified view of the customer, allowing the rapid and scalable creation of highly targeted digital interactions. Marketers, product managers, and engineers use Dynamic Yield daily for launching new personalization campaigns, running server-side and client-side A/B tests, leveraging machine-learning for product and content recommendations, and employing algorithms for smartly triggered email and push notifications.

# REQUEST A DEMO

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