35 Ways To Do Real-Time Personalization
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35 Ways To Do Real-Time Personalization

Today’s modern marketers must be empowered to act on data – any kind of data, from any source – to deliver relevant, individualized digital experiences to their key audiences. Real-time personalization has been proven to improve engagement, conversion rates and customer experiences for B2B and B2C companies.

Marketers are catching on! According to a recent study, 85% of marketers are currently using personalization, and 89% report seeing measurable benefits from it.

There are many different ways to do personalization. In this eBook, we’ll show you 35 examples of real-time personalization in action, from converting visitors, to driving customer engagement and loyalty, to generating repeat business and upsell opportunities.
B2B: GENERATE NEW LEADS

01
MAKE A STRONG FIRST IMPRESSION

Show — don’t tell — visitors that your product is the right solution for their unique business needs. With real-time personalization, you can present them with relevant content “in the moment” to drive more qualified leads on your site.

02
IMPROVE ACCOUNT-BASED MARKETING

Trigger personalized experiences to high-value visitors based on company name or industry. This will help you get the most relevant content and messages in front of your target accounts the moment they hit your site.

03
HELP VISITORS DISCOVER RELEVANT CONTENT

Even if you have a lot of great content on your site, it might not always be easy for prospects to find. Promote the most relevant pieces of content throughout your site to capture the attention of each individual and drive them further down the funnel.
B2B: GENERATE NEW LEADS

**04**

**BOOST BLOG ENGAGEMENT**

Present visitors with recommended blog articles based on the type of content that’s most relevant to them to keep them engaged on your site, rather than exiting.

**05**

**DRIVE REGISTRATIONS FOR WEBINARS AND EVENTS**

Marketers are always looking for creative ways to promote relevant offers and drive attendance for their events. Turn more visitors into leads by promoting relevant webinars and events to the right audiences.

**06**

**GUIDE PROSPECTS TO THE NEXT STAGE OF THE JOURNEY**

Each of your prospects will move through the buyer’s journey at their own pace. Ensure your messages and content are designed to guide them to the next stage and are timed appropriately for each person.
B2B: GENERATE NEW LEADS

07

USE DYNAMIC CALLS-TO-ACTION

Each time a customer takes an action on your site (like clicking a CTA button), you can introduce new actions or offers in its place. As you better understand a visitor, the offers on your site can become more and more targeted to engage and — eventually convert — that individual.

CTA updated in real time based on visitor behavior

08

A/B TEST FOR BETTER RESULTS

Use targeted A/B or multivariate testing to try different personalized experiences on your website — like changing copy, message location or format for different audiences — to see which performs best. Measure improvements in click-through rates, conversions or other goals you set.

Personalized site navigation A/B tested for different personas

09

INTEGRATE EMAIL AND WEBSITE EXPERIENCES

Your email campaigns and website experience should be working together to help prospects navigate the buyer’s journey. Personalize your email content at open time based on everything you know about your prospects from their interactions on your website.

Personalized email message with content updated at open time
**B2B: PROMOTE ADOPTION AND UPSELLS/CROSS-SELLS**

**10**

**OFFER STEP-BY-STEP ONBOARDING**

New visitors may be slow to adopt your application. Provide step-by-step onboarding, task lists or tips/suggestions in order to educate, increase engagement and speed up adoption.

Inline step-by-step onboarding personalized based on actions taken/not taken

**11**

**DRIVE CONVERSIONS FROM FREE TRIALS/FREEMIUM USERS**

Utilize insights into in-app user behavior to engage and educate your freemium user base with timely updates and targeted messages about the benefits of your paid products. Effective, relevant messaging will drive an increase in conversions.

Message tailored to non-advanced plan users, leveraging Salesforce data

**12**

**TARGETED CROSS-SELLING & UPSELLING TO CUSTOMERS**

With deep behavioral analytics, you can understand your customers' true wants and needs. Act on this data to present promotions and relevant special offers to introduce upsells and cross-sells at the right time and place.

Targeted in-app modal with upgrade offer
B2B: PROVIDE SUPPORT AND COLLECT FEEDBACK

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REDUCE SUPPORT COSTS

Identify common technical issues encountered by users and use real-time messaging to proactively deliver tips, suggestions, and the most relevant self-help articles in context. This will help reduce customer support inquiries, calls and costs.

Call-out timed based on behaviors that lead to commonly asked questions

14

COMMUNICATE WITH INDIVIDUAL ACCOUNTS AT THE RIGHT TIME

When is the best time to reach out to your customers? When they are already thinking about you, of course! When you have specific announcements for individual accounts, in-app messaging can help you reach them while you have their attention.

In-app message targeted to individual accounts

15

DELIVER PROGRESSIVE PROFILING SURVEYS

Learn more about your customers with unobtrusive surveys and relevant, targeted questions that dynamically adapt the user experience based on responses. Leverage this response data for targeted in-app messaging and promotions, as well as product enhancements.

Inline in-app survey driven by prior responses
B2B: PROVIDE SUPPORT AND COLLECT FEEDBACK

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PRESENT NPS AND OTHER SURVEYS

When trying to gather customer feedback, including Net Promoter Score (NPS) input, there’s no better place to do it than in your app. Present targeted in-app surveys to engaged users and get a much higher response rate. Use the feedback collected to better serve customers and further personalize their experiences.

NPS survey, A/B tested to find optimal messaging and timing

B2C: CREATE GREAT CUSTOMER EXPERIENCES

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TAILOR YOUR HOMEPAGE TO ENGAGE DIFFERENT PERSONAS

Each time a visitor arrives on your site, they provide clues about their likes and dislikes depending on what they’re engaging with and where they’re spending their time. Knowing their interests, you can tailor the homepage — in real time — to make it more relevant to them.

Homepage hero area personalized based on geolocation and persona

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RE-ENGAGE VISITORS WITH A PERSONAL SHOPPING COMPANION

Present each shopper with a customized list of products they’ve recently viewed or spent the most time viewing. This personalized shopping companion enables visitors to quickly access their recently viewed products, prioritized by their level of interest to help boost conversions.

Shopping list tab displays recently viewed or purchased products, prioritized by engagement
19

LEARN ABOUT YOUR SHOPPERS WITH PROGRESSIVE PROFILING

You can learn a lot about your visitors from their actions on your site, but you can’t always learn everything. Create more individualized experiences and build loyalty with your visitors by providing progressive profiling surveys throughout your site.

Survey messages triggered by visitor activity and previously captured data

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CAPTURE EMAIL ADDRESSES AT THE RIGHT TIME

Email capture campaigns are a long-established tactic. Consider making them even more powerful by targeting them to specific groups of visitors, timing them to appear when the visitor is most engaged, and personalizing the content in the message. Get creative to find ways to make them less intrusive and more effective.

Targeted email capture campaign

21

PERSONALIZE EMAILS IN REAL TIME

When personalizing the content of your emails, timing matters. A lot can change from when you send an email to when it’s opened — a product can go out of stock, the price could change or the recipient may have already purchased it. When sending product recommendations or other content to your customers, make sure the email messages are relevant at open time.

Personalized recommendations inside email updated at open time
B2C: CREATE GREAT CUSTOMER EXPERIENCES

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LET YOUR CONTENT
DRIVE SHOPPING

Content is becoming more influential in driving online purchase decisions. Real-time behavioral analytics allow you to monitor and track what visitors are reading on your site. Knowing this, you can automatically and subtly promote relevant products related to the category or tags of the articles they are reading.

B2C: FACILITATE DISCOVERY

23

PERSONALIZE SEARCH FOR EVERY VISITOR

Typically, visitors using on-site search type something into your search bar, visit a search results page, then click on a product that catches their eye. You can shorten this process by providing individualized product recommendations directly into the search bar itself.

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PROVIDE QUICK ACCESS TO SIMILAR PRODUCTS

While browsing a product detail page (PDP), help your visitors find similar products they may be interested in. Make sure these recommendations are unique and highly targeted to each shopper by considering an individual’s behaviors, affinities and preferences based on time spent and level of engagement with particular brands, categories, styles, etc.
B2C: FACILITATE DISCOVERY

25

HELP SHOPPERS FIND COMPLEMENTARY PRODUCTS

Help shoppers find products that pair well with products on your PDPs, in the cart, or on other pages across the site, yet still appeal to the individual preferences and affinities of each person.

26

PROMOTE RELEVANT BRANDS

Individualized recommendations don’t need to be limited to products. When promoting specific brands across your site, ensure that those brands are relevant to each shopper. This will help them more easily find their favorites or similar brands they may enjoy.

27

ENCOURAGE EXPLORATION WITH RELEVANT SUBCATEGORIES

Product categories can often be broad with many subcategories within them. When organizing category pages, minimize clicks and help shoppers find what they’re looking for by recommending subcategories that will capture their interest.
**B2C: FACILITATE DISCOVERY**

**28**

**SORT PRODUCTS BY RELEVANCY TO EACH INDIVIDUAL**

Helping visitors find products they want to purchase can be as easy as sorting your category pages or search results pages the right way. Rather than rely on sorting by generic “relevance,” sort the products in a way that are actually relevant to each individual based on their likes and preferences.

**B2C: ENCOURAGE PURCHASE & GROW BASKET SIZE**

**29**

**PROMOTE THE RIGHT DEALS**

When you have many different promotions running at the same time, it can be tough to prioritize them or ensure that they are seen. Use personalization to make sure that each of your shoppers sees a deal that is relevant to them.

**30**

**HIGHLIGHT PURCHASE AND VIEWING TRENDS**

Sometimes visitors just need a little encouragement that they’ve made a good choice to motivate them to convert, a concept known as social proof. A counter of the number of visitors who have viewed or purchased the item — updated in real time — is a subtle tactic to provide that extra encouragement and drive action.
31
REDUCE CART ABANDONMENT WITH REMINDERS
Shopping cart abandonment plagues every online retailer. Prevent abandonment by targeting visitors with a compelling reason to buy from you today. Remind shoppers of what’s left in their cart – in session or when they return – with a special offer or message that drives urgency.

Reminder message featuring product left in shopping cart

32
DRIVE CONVERSIONS WITH CARRY-THROUGH MESSAGING
Individualized cart abandonment or exit messages are often successful at catching attention, but they can be even more impactful when those messages are carried through the rest of the site experience. Remind visitors of any special offers or incentives throughout their journey on your site to encourage conversion.

Consistent offer messaging carried through from pop-up to inline messages across site

33
DELIVER CONSISTENT MESSAGING ACROSS CHANNELS
Recognizing a visitor across channels is a powerful tactic to leverage when providing personalized experiences. Keep your messaging consistent across your website and mobile experience to remind visitors of abandoned carts, ongoing sales, outstanding loyalty points or credits, and more.

Consistent, personalized messaging across desktop and mobile
**B2C: ENCOURAGE PURCHASE & GROW BASKET SIZE**

### 34 CROSS-SELL WITHIN THE CART

It’s never too late to provide additional recommendations. As a shopper is proceeding to the checkout page, recommend other items the visitor may also like. Be creative with the types of products you recommend. Display products the visitor has heavily engaged with during session, products from the shopper’s favorite brands, or products that can be used with the items in the cart.

**Individualized product recommendations on the cart page**

### 35 INCREASE BASKET SIZE WITH PERSONALIZED SHIPPING INCENTIVES

Use a well-timed shipping incentive to accelerate conversion. Recommend a few products the shopper can add to his cart to get free shipping, or a product that she can add with the same shipping cost. Use this type of campaign as a last-minute attempt to grow order value.

**Inline message recommending a relevant product to add at no additional shipping cost**

**START PERSONALIZING TODAY**

The possibilities for personalization across channels are endless, but these 35 examples should give you a good foundation to start brainstorming. Make sure you find the right partner to help you establish your personalization strategy and implement experiences that improve engagement, boost conversions and build loyalty.
### PERSONALIZATION METHODS

When it comes to delivering personalization, you’re not limited to a single method or message type.
Check out your options:

#### INFOBARS

Communicate information or notifications with a persistent, but non-intrusive header or footer bar.

#### IN-PAGE EDITS

Personalize parts of a webpage including text and images to present relevant content.

#### INLINE CONTENT

Deliver personalized blocks of dynamic content based on a visitor’s behavior or actions.

#### POP-UPS

Interrupt the user experience to drive a critical action or to promote relevant content or incentives in real time. Lightbox optional.

#### CALLOUTS

Highlight the most important features and content on your website to drive more engagement.
About Evergage

Evergage’s real-time personalization platform delivers The Power of 1, enabling digital marketers to transform the dream of 1:1 customer engagement into reality. Combining in-depth behavioral analytics and customer data with advanced machine learning, Evergage provides the one platform you need to systematically understand and interact with each person that visits your site or uses your app – one at a time, “in the moment” and at scale – to deliver a maximally relevant, individualized experience.

Contact Evergage at 888-310-0589 to speak to an expert about your needs today!