



Personalization Across the Buyer's Journey

Examples For B2B Marketers



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Personalization Across the Buyer's Journey

EXAMPLES FOR B2B MARKETERS

As a B2B marketer, you probably spend a lot of time thinking about buyer and customer journeys. You're always seeking new and innovative ways to improve your demand generation and account-based marketing (ABM) results and move prospects from one stage of the funnel to the next. Then, of course, you need to communicate effectively with those same people after they purchase to help ensure customer success, retention and expansion. You recognize that a person's needs will vary depending on where he is in his journey, and you want to ensure that his experience throughout that journey is as smooth as possible.

It's important to understand that every prospect and customer is unique. They each have their own needs – at the individual and account level – and they will each proceed along the journey at their own pace. From their initial engagement to their consideration, evaluation, onboarding, adoption, retention and advocacy stages, each person has his own needs and interests.

In this eBook, we'll identify several key ways that you can use personalization across the B2B customer journey so that no matter how or when a person falls into a particular stage, you're prepared to provide a relevant and engaging experience.

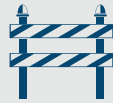


INITIAL ENGAGEMENT

Make the Homepage Relevant

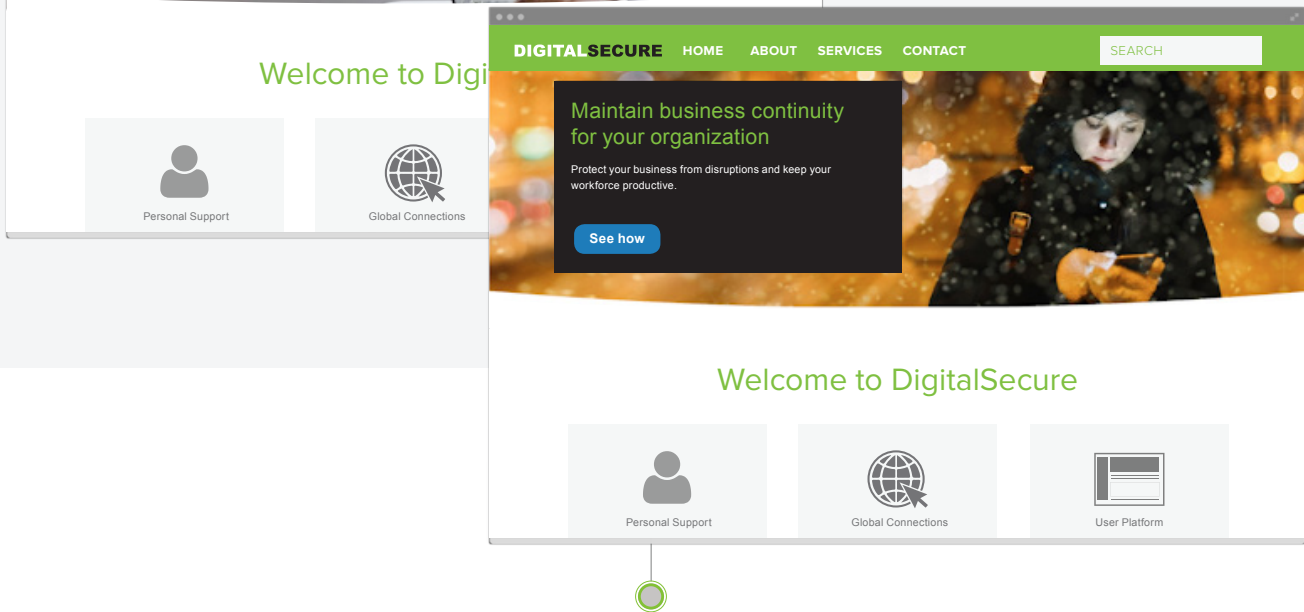
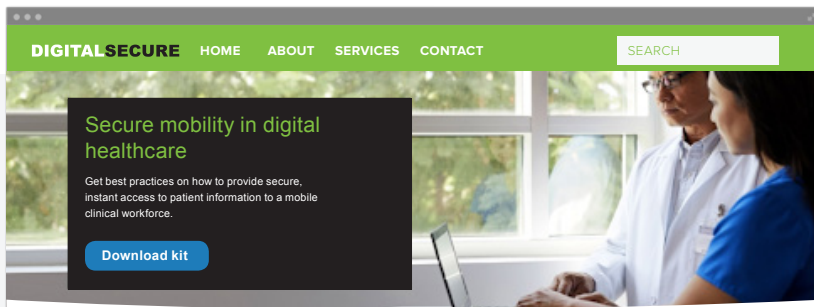
CHALLENGE

You spend a lot of your time and budget to drive traffic to your site. The last thing you want to do is lose those visitors before they get the chance to determine if your product or solution could meet their needs. But how do you decide what to feature on your homepage? Do you tailor your headline, images and copy to appeal to different audiences, or do you lead with a general message that you hope will appeal to the lowest common denominator?



SOLUTION

There's no need to keep your homepage experience static and generic for every visitor. To capture each person's attention immediately, you should ensure that your homepage – or any page a visitor lands on – is immediately relevant to that person. Tailor your content and messaging based on someone's location, campaign source, industry or even specific company. By catching the attention of each visitor immediately, you can lower your bounce rates and improve time on site and page views.



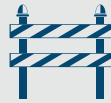
This site displays a relevant homepage experience to each of its target industries. For example, visitors in the healthcare industry see copy and images relevant to them (top image), while visitors who don't fall into a target industry (or whose industry can't be determined) see a generic version of the homepage (bottom image).

INITIAL ENGAGEMENT

Improve Account-Based Marketing

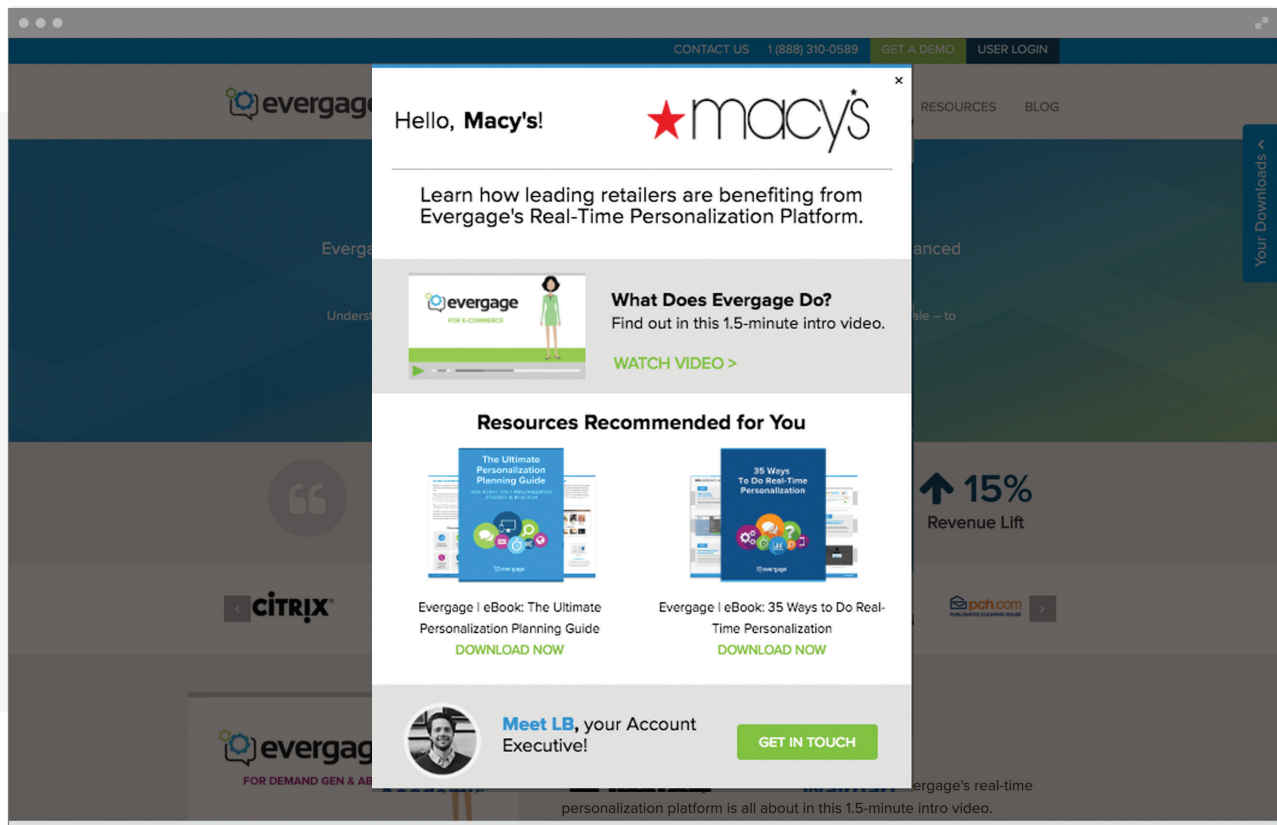
CHALLENGE

With an account-based marketing (ABM) approach, your sales and marketing teams focus their efforts on reaching a select group of target companies — rather than spreading their message broadly to capture a large number of leads. After all the hard work you do to reach those accounts with targeted communications, it doesn't make sense to provide a generic, one-size-fits-all experience on your website. The premise of ABM is to be as personalized as possible to demonstrate your specific value proposition to each account.



SOLUTION

Personalization can help you create the unique experiences that will grab the attention of your target prospects, engage them with relevant content, and convert them to leads and customers. Trigger personalized experiences to high-value visitors based on company name, industry, company size, or other relevant firmographic details. This will help you get the most relevant content and messages in front of your target accounts the moment they hit your site.



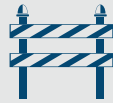
Evergage presents a personalized modal to each of its target accounts. The modal dynamically displays the account's name and logo, relevant content recommendations, and direct access to the assigned salesperson. Evergage has found that visitors who have viewed this ABM message are 10 times more likely to convert (e.g. register for content or request a demo/appointment) and typically spend five times longer on the site than average. They also take more actions on the site and are more likely to visit multiple times.

INITIAL ENGAGEMENT

Carry the Conversation Beyond the Landing Page

CHALLENGE

When you run an email, social or paid search campaign, you often create landing pages that relate specifically to the content or offer you are promoting from that source. This ensures that the visitor lands on a page that is relevant and engaging. But what happens when the visitor leaves that page? Most sites don't carry the conversation through to the rest of the site, which means that the visitor is left to navigate a generic site that doesn't recognize his interest in a specific promotion or topic.



SOLUTION

Don't forget the landing pages a person has visited in the current session or previous ones — this can be a clue to his needs and interests. Take note of which campaign the visitor came in through and how he engaged with the landing page. If he was very interested in the content of the page, make sure that topic or product is highlighted throughout your site to help him easily find additional information.



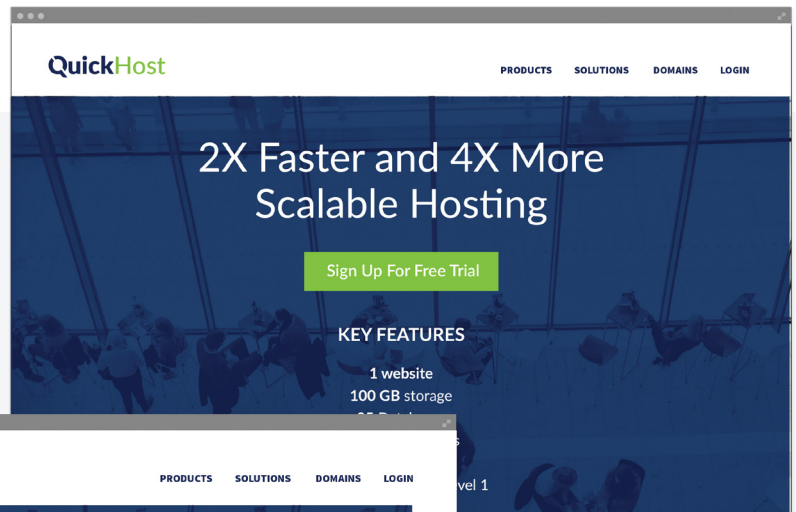
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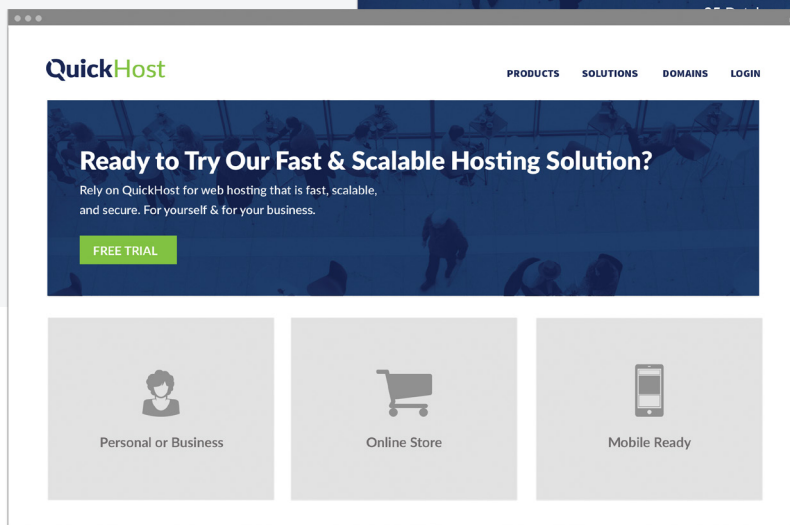


1. Viewer clicks on paid advertisement.



2. Visitor spends time reviewing product features.

3. Homepage reflects visitor's product interest and journey stage and presents relevant CTA.



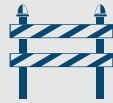
This site carries a conversation through from a landing page to the rest of the site. For example, if a visitor clicks on a link from a PPC campaign, she is taken to a landing page about one of the company's products. The landing page incorporates a message acknowledging the visitor's source. When she navigates to the homepage later, the hero features additional information about the product and a CTA asking if she'd like to sign up for a free trial.

INITIAL ENGAGEMENT

Promote Relevant Events or Webinars

CHALLENGE

Webinars and events remain highly effective lead generation tactics. But webinars are often targeted to different industries or cover specific topics, while events take place in specific locations. Not every webinar or event will be relevant to every prospect — and you'll be much more likely to drive attendance when you can target them to the right people.



SOLUTION

Turn more visitors into leads by promoting relevant webinars and events to the right audiences. Immediately recognize a visitor's industry, company size, geolocation, etc. to recognize if an upcoming webinar or event is relevant to the visitor and promote it only if it is. Pay attention to what pages each visitor spends time viewing and which topics he is interested in to ensure you only highlight webinars or events he will likely want to attend.



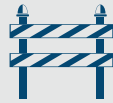
This company targets visitors within a certain distance of an upcoming roadshow location to encourage attendance among relevant prospects. The geo-targeted promotions drive significant attendance at the company's roadshows and have resulted in clickthrough rates up to 12% and over 500 incremental registrants.

✓≡ CONSIDERATION

Surface Relevant Content Recommendations

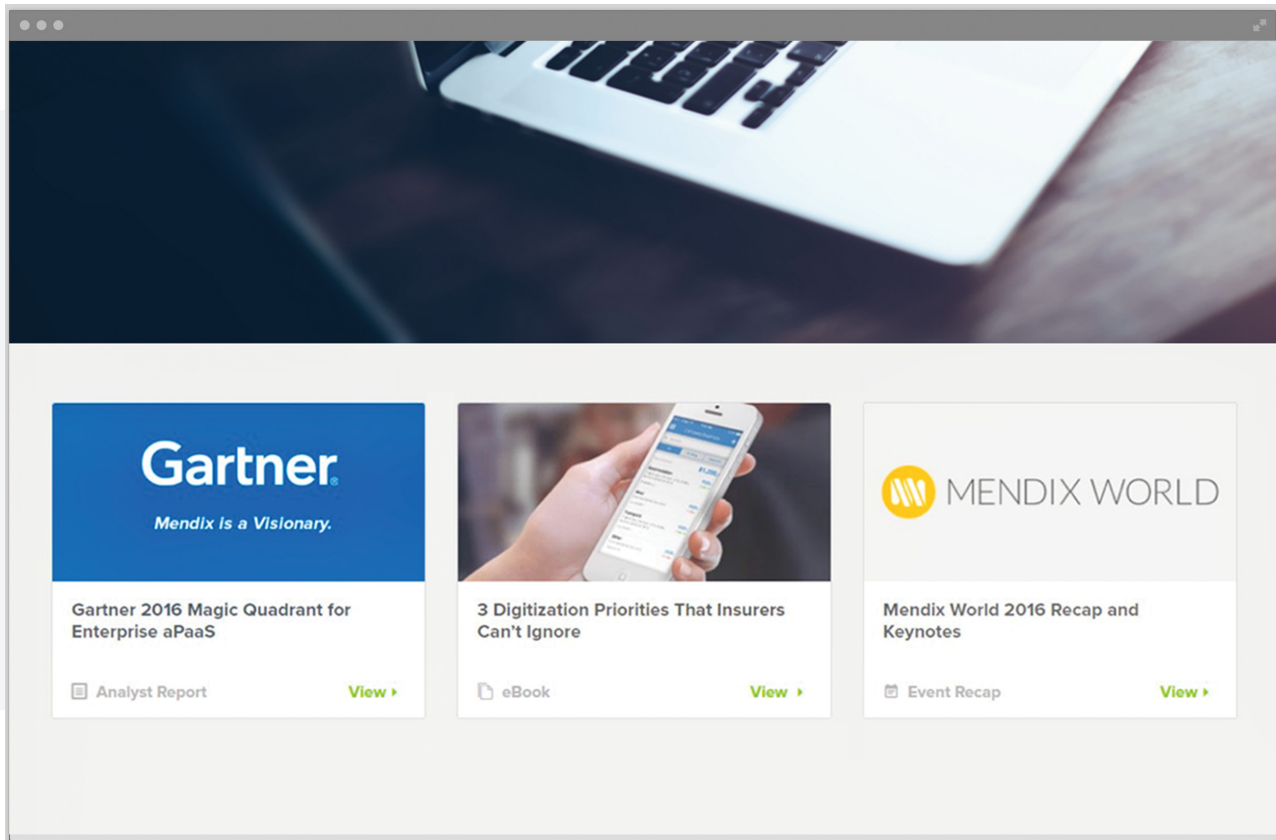
CHALLENGE

Content is a fundamental component of most B2B marketing strategies. Teams often invest significant resources to ensure that they have an educational and regularly updated blog, as well as other assets targeted to different audiences and different stages of the funnel such as eBooks, case studies, videos, etc. But even if you have a lot of great content on your site, it might not always be easy for prospects to find. How can you ensure your content efforts aren't wasted because prospects can't quickly locate relevant, helpful assets?



SOLUTION

Leverage machine-learning algorithms to surface the most relevant content assets for each individual. Create your own algorithmic recipes to factor in the criteria that matter most to your audience — such as industry, stage of the funnel, content type, or keyword. This allows you to promote the most relevant pieces of content throughout your site to capture the attention of each individual and drive them further down the funnel.



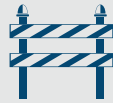
Mendix, a leader in the emerging Platform-as-a-Service market, provides relevant content recommendations across its site. In this case, they're dynamically highlighting different content assets based on the visitor's interests. With this approach, the company has generated a 10% increase in content downloads.

CONSIDERATION

Improve Blog Engagement

CHALLENGE

A corporate blog is an important asset for most demand gen marketers. It's a valuable source of traffic and early stage leads — and it helps the company demonstrate thought leadership in its industry. Blog visitors are often gathering information and looking for a variety of educational content. Many of them come in directly to a specific blog post from search or social, so they are highly likely to leave after reading their first post. How can you encourage them to stick around and continue browsing your site?



SOLUTION

Blog recommendations based on machine-learning algorithms are a must-have for any company with a blog. 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. They are much more likely to continue their research on your site if they can easily find something that catches their attention.



The screenshot shows a web browser displaying a blog post on the Nuxeo website. The page has a navigation menu with links for 'Why Nuxeo?', 'Products', 'Integrations', 'Services', 'Customers', 'Industry', 'About', and 'Learn'. There are also icons for social media and a 'Request a Demo' button. The main content area features a quote from Mark Twain, followed by a paragraph of text. A sidebar on the right, titled 'You may also like these blogs:', recommends a blog post titled 'Content Services, Systems of Understanding and the Future of ECM'. Below the title is a short summary and a 'Continue Reading' link. A small green circle is positioned below the screenshot, pointing to the recommendation sidebar.

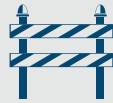
Nuxeo — a global software company providing a cloud-native, content services platform that enables organizations to manage digital content of any type and size — leverages machine-learning algorithms to recommend additional blog posts on the right side of the page, personalized at the one-to-one level for each blog reader. With this campaign, Nuxeo has generated a 34% lift in blog engagement.

CONSIDERATION

Send Personalized Emails

CHALLENGE

Many demand gen marketers send email campaigns to encourage prospects to return to their site and engage with additional content. Open rates for such emails can be quite low, so when people do open your emails, you want to be sure they contain relevant and engaging information for each individual recipient. Otherwise, you've wasted an opportunity to guide the prospect forward in their journey.



SOLUTION

Any email that is sent to a prospect should contain content that reflects the most up-to-date information you have about the actions the person has already taken. Has she already read certain blog posts? Don't recommend those! Has she shown interest in a different topic than the one explored in the email? Replace it with something else! This seems obvious, but if you can't personalize your emails at open time, you aren't able to avoid these potentially embarrassing situations.



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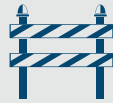
This company ensures that its email communications are updated at open time to reflect any changes in a person's preferences and any behaviors already taken. For example, the company sends out an email promoting an upcoming webinar to prospects. If a recipient who learned about the webinar elsewhere has already signed up for it before opening the email, at open time, the content of her email is updated to acknowledge her registration and suggest a few relevant resources to check out in advance of the webinar.

CONSIDERATION

Guide Prospects to Next Stage in the Journey

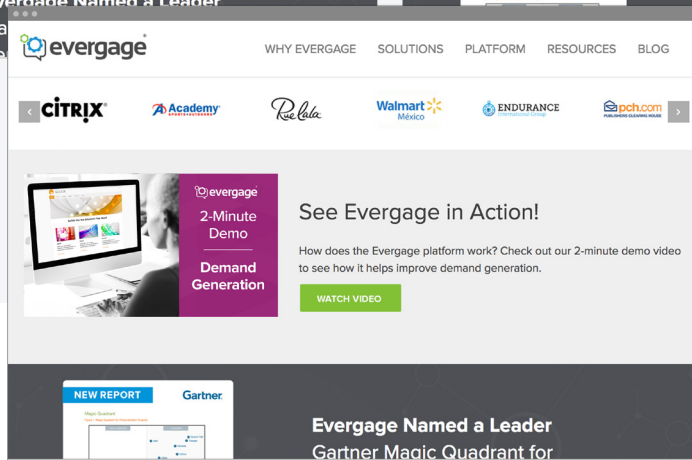
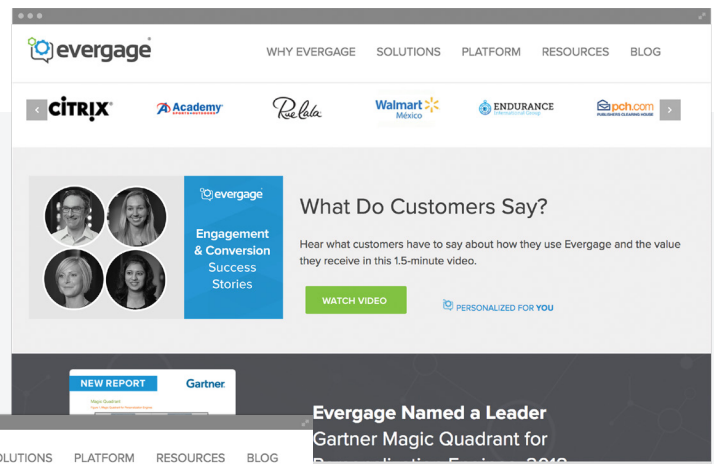
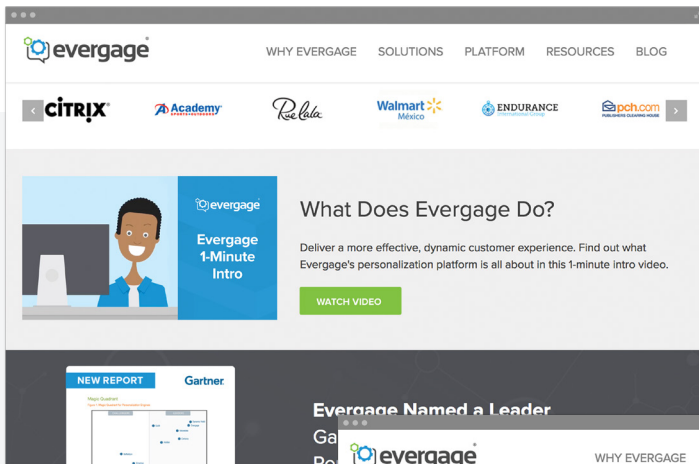
CHALLENGE

Each of your prospects will move through the buyer's journey at their own pace. A site visitor in the early stages of her research will likely be looking for different information from a visitor who is nearly ready to make a purchase. How can your site adapt to these different stages? What can you do to ensure that you are providing the right information to each visitor to help adequately inform each purchase?



SOLUTION

There's no reason to keep your website static for each visitor or promote the same asset in the same section of your site to everyone at all times. Instead, use those areas to guide each person to the next stage. For example, you can use dynamic CTAs that display a different asset or recommend a different action based on the stage of the journey the visitor appears to be in. As you better understand a visitor, the offers on your site can become more and more targeted to better engage and — eventually convert — that individual.



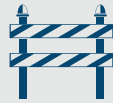
Evergage uses dynamic video content and CTAs to guide visitors down the funnel. Each time a prospect takes the action to watch a particular video, the section under the hero area on the homepage introduces different videos and actions in its place. Starting with an ungated introductory explainer video, followed by a customer testimonials montage, and then a relevant, gated demo video, the site continually recommends the next action that a visitor should take to advance his learning and capture him as a lead.

EVALUATION

Notify Salespeople of Engaged Prospects

CHALLENGE

When it comes to making a sale, timing is everything. This is especially true for companies with account-based marketing (ABM) programs. If a prospect from a target account reads a few case studies or watches a couple of product videos on your website, you want the appropriate salesperson to know about it right away and to follow up while your company is still top-of-mind for the prospect. But what's the best way to relay that information to the sales rep in a manner that will catch their attention?



SOLUTION

Internal email alerts are the perfect solution for this challenge. These emails can be triggered the moment one or more visitors from a target account takes certain actions on your website, alerting the designated sales team member(s) of the account's recent activity. This allows her to provide personalized outreach, timed at the opportune moment.



Key Account Alert: Acme Corp visited website

TE techexlysales <techexlysales.com>
princessoctavia@gmail.com

TECHEXLEY Internal Alert

Hi Octavia,
Jason Smith from key account Acme Corp just visited the website for an extended period of time.

Consult Salesforce for additional details including pages viewed, visit duration and download activity.

Please follow up promptly with this high quality lead.

Thank you,
Sales Operations



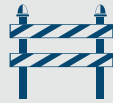
This site sends out internal emails to notify salespeople when visitors from their target accounts have demonstrated meaningful engagement with the company's website. For example, if someone from ABM target Acme Corp visits the website, views several pages and downloads an eBook, the company triggers an email to inform the account's sales rep of the activity and prompt her to follow up with the prospect right away.

EVALUATION

Connect the Online Experience to the Call Center Experience

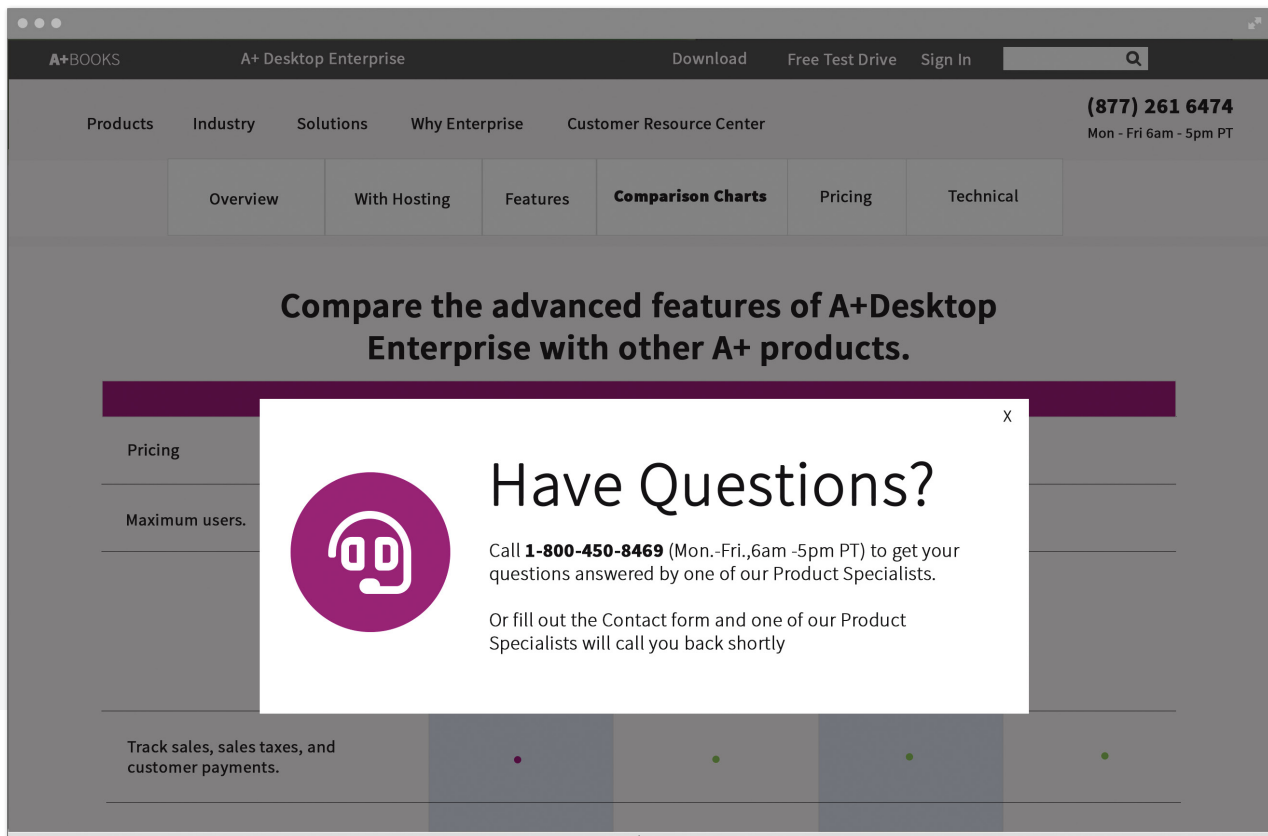
CHALLENGE

Some companies aim to drive prospects to a call center to complete a transaction with a salesperson or agent. But in large organizations, a customer can get bounced around to different lines until they finally get transferred to the person that can address their needs. When a prospect needs to dig through the website to find a phone number, explain his needs to a machine, and then be transferred to multiple different people — something isn't right. How can you better ease the transfer from web to phone?



SOLUTION

Recognize what a prospect is doing on your site and use that understanding to direct him to the right phone number from the start. Once the prospect identifies himself, the phone operator can gain an even deeper understanding of his interests and needs based on what she knows about him from his engagement with the website.



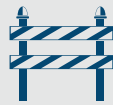
This large technology company's site notes when a prospect seems interested in a specific product and delivers a pop-up directing her to a call center. The number she is presented varies depending on her needs. Then, once she calls the number, the salesperson on the phone already knows what product she is interested in and can immediately start addressing her questions — greatly improving the prospect's experience and likelihood to buy.

EVALUATION

Convert Free Trial or Freemium Users

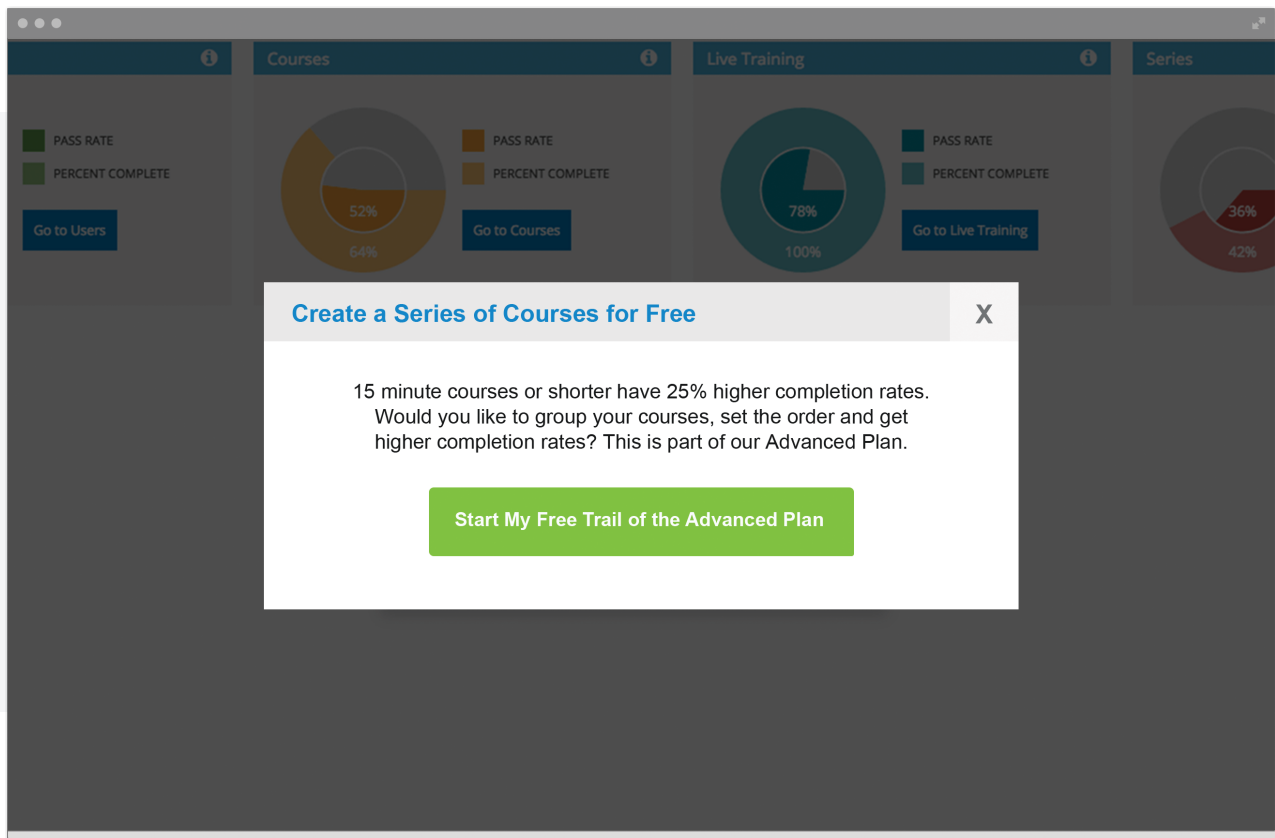
CHALLENGE

Many companies offer a free trial or freemium experience to prospects to help them evaluate the solution before making a decision to convert to a paid subscription. After all the work you do to acquire such prospects and encourage them to take a free trial, how can you make sure they recognize the value of your solution so they ultimately convert?



SOLUTION

You can take everything you learn about your prospects during both their research phase as website visitors and their evaluation period as free users and use that information to deliver personalized experiences within your free trial or freemium environment. Leverage appropriately timed messages, videos, help resources, offers, etc. while users are logged in and tailor the content to the persona, the account or the individual herself, helping ensure she understands the benefits of becoming a paying customer.



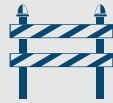
A key value in the Mindflash online training platform comes from users creating their own training courses. To encourage all free trialers who hadn't yet created their own courses to do so, Mindflash presents relevant 1-to-1 in-app messages in real time. Using this approach, Mindflash was able to increase creation of sample courses by 15% and improve their free trial conversion rate.

ONBOARDING, ADOPTION AND RETENTION

Onboard New Customers

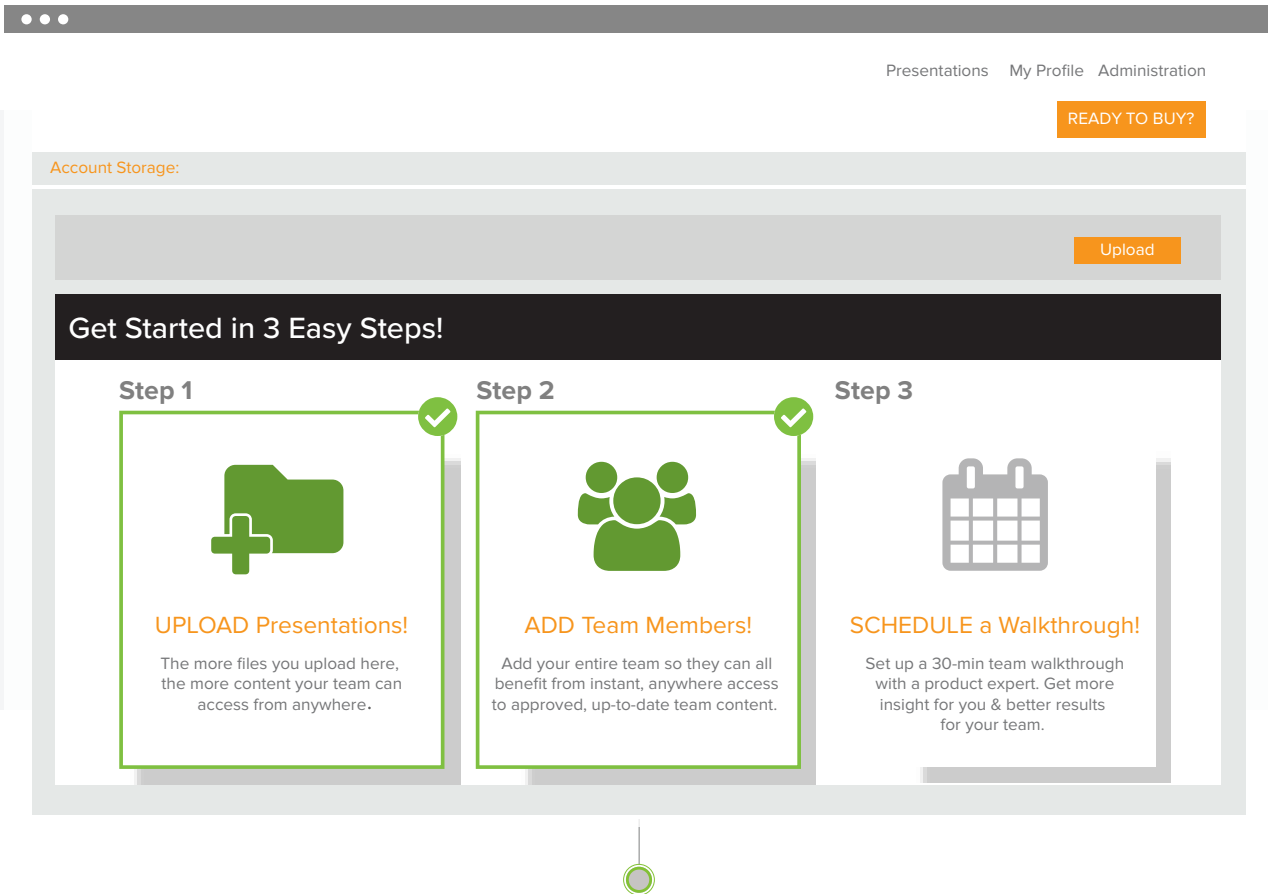
CHALLENGE

Once a prospect becomes a customer, success and, ultimately, retention become top goals. If users fail to adopt a product, it can quickly fall by the wayside. It's important that key users understand the value early, so they not only start using the product, but also encourage other users to do so too. If customer success and retention are in the cards at all, effective onboarding of new customers is critical.



SOLUTION

Facilitate the product adoption process by providing personalized, step-by-step onboarding – task lists or tips that educate, guide and engage users. This onboarding process should be as tailored to the individual as possible. For instance, if during the customer's research and evaluation phase he showed a preference for a specific use case, in-app messaging can guide him through the steps involved in using the product for that purpose.



The screenshot shows a user interface for account storage. At the top right, there are links for "Presentations", "My Profile", and "Administration", and a "READY TO BUY?" button. Below this is a section titled "Account Storage:" with an "Upload" button. The main content area is titled "Get Started in 3 Easy Steps!" and contains three steps:

- Step 1: UPLOAD Presentations!** The more files you upload here, the more content your team can access from anywhere.
- Step 2: ADD Team Members!** Add your entire team so they can all benefit from instant, anywhere access to approved, up-to-date team content.
- Step 3: SCHEDULE a Walkthrough!** Set up a 30-min team walkthrough with a product expert. Get more insight for you & better results for your team.

Steps 1 and 2 are marked with green checkmarks, indicating they are completed. A green circle with a checkmark is positioned below the steps, connected by a vertical line.

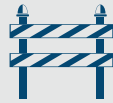
This app offers step-by-step onboarding that is personalized based on actions taken/not taken to help new users get started with the product and achieve success.

ONBOARDING, ADOPTION AND RETENTION

Re-engage New Users with Triggered Email

CHALLENGE

No matter how smooth your onboarding process is, some customers will inevitably drop off before completing it. If they don't go through all of the required steps, they may not receive all of the value of your solution — or they may not be able to get started at all. How can you remind customers of incomplete actions?




SOLUTION

Triggered emails can be used to remind customers of where they are in the onboarding process. These emails can suggest next steps to take for brand-new users, remind users which steps remain incomplete, or thank customers for completing all of the onboarding steps. As always, these emails should be as relevant to the individual customer as possible.



Complete Your Account Setup – Let's Get Started!

CP Cyber Protectors <info@cyberprotectors.com>
megan@gmail.com




Hi Megan,

We noticed that you hadn't quite finished setting up your Cyber Protectors account. Log in below to finish the process and start getting the most from your subscription!

[Get Started](#)

Getting Started With Cyber Protectors


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CASE STUDY



CASE STUDY:
Better Adoption Increases Security

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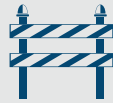
When a user has abandoned the onboarding process, this SaaS company triggers an email to remind her of the remaining steps. It also provides relevant help content aimed to guide her if, perhaps, she has gotten stuck at that stage of the process.

ONBOARDING, ADOPTION AND RETENTION

Capitalize on Upsell/Cross-sell Opportunities

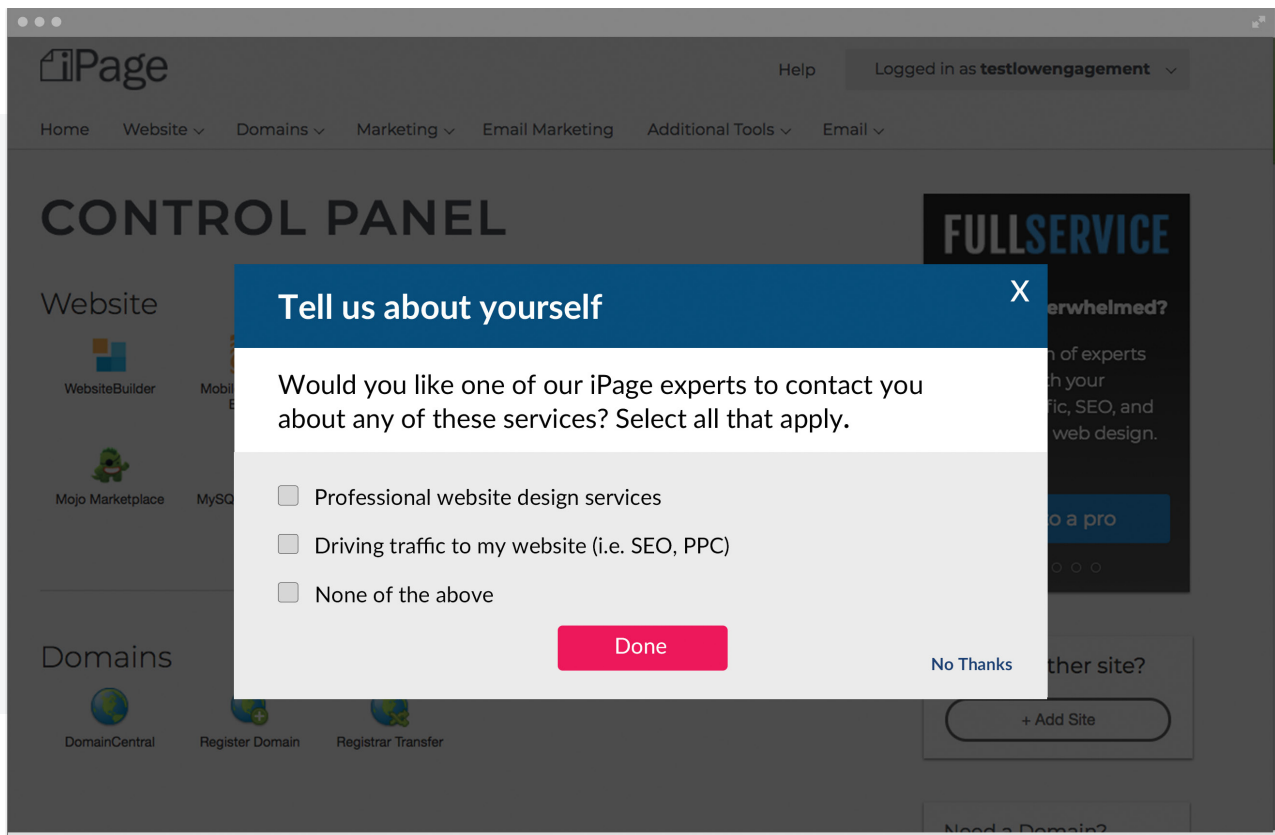
CHALLENGE

Many organizations have business models that allow customers to convert or buy online without ever speaking with a salesperson. While it makes for a scalable sales process, it means that companies don't always have an easy way to identify which customers would be ideal candidates for additional products and services, nor can they easily upsell those customers. How can you provide relevant upsell or cross-sell messages to the appropriate customers?



SOLUTION

With behavioral tracking or targeted survey questions delivered through your personalization platform, you can easily identify interest in complementary products or services. Then you can use an appropriately timed in-app message or inline experience to suggest a relevant offer or upgrade option at the right moment. Additionally, you could connect your personalization platform with your CRM solution to automatically trigger an action to create an opportunity in the CRM the moment an upsell opportunity is identified. This ensures that the right person is aware of the opportunity and can follow up with the customer in a timely manner.



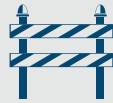
iPage delivers a survey to first-time users who have never spoken with a salesperson. If the answers to those questions indicate that the user would be a strong candidate for an upsell, an opportunity is automatically created in Salesforce and the appropriate salesperson is alerted to the opportunity. This campaign has driven a 34% increase in upsell lead volume from marketing-driven sources.

ONBOARDING, ADOPTION AND RETENTION

Proactively Address Support Questions

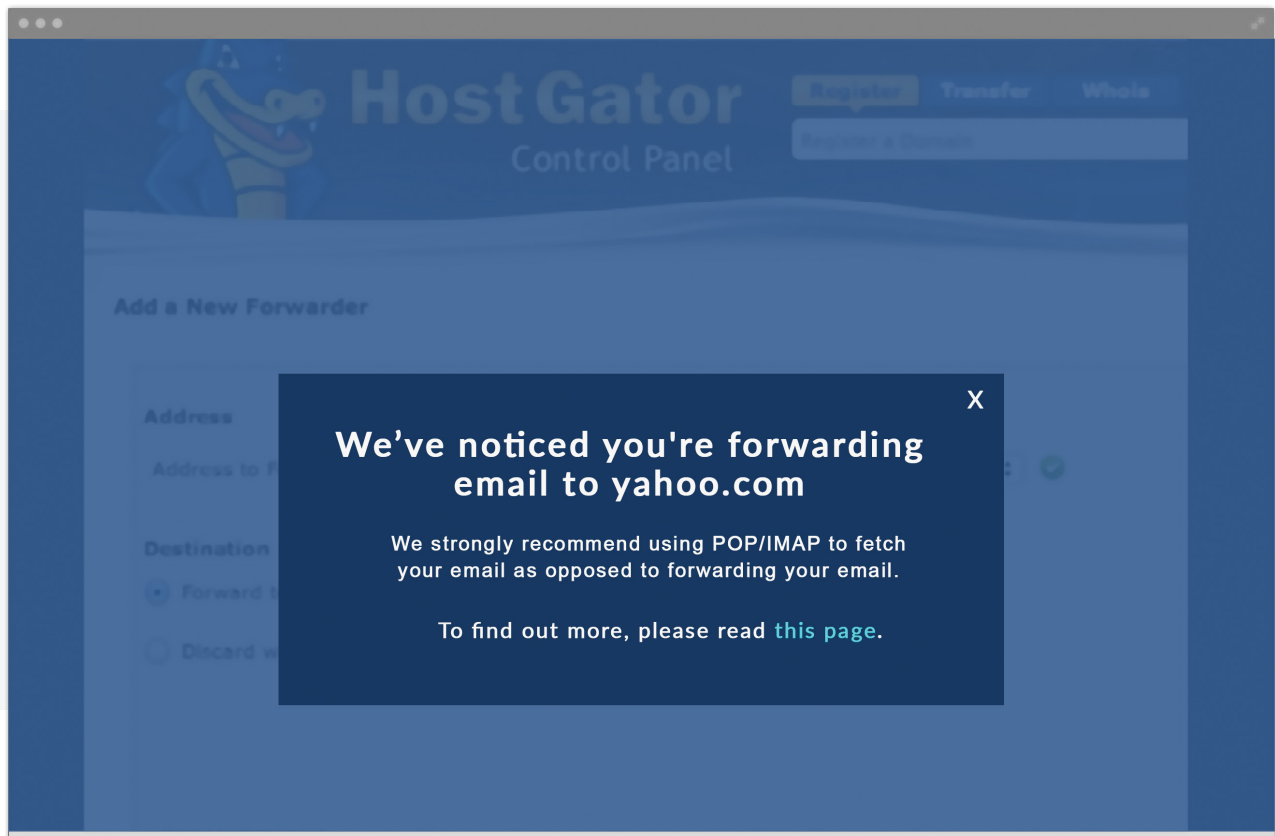
CHALLENGE

Technology providers are always looking for ways to ensure that customers find ongoing value in the solution, improve efficiency and resolve issues quickly. Once a customer takes the time to log an issue, she is likely already frustrated. And then there are frustrated customers that don't even bother to ask for help. How can you address support issues before they arise?



SOLUTION

With personalization, you can serve real-time suggestions and time-saving tips related to the person's usage patterns or specific goals. You can even highlight important features that a user has never used before at the moment he is likely to be interested in them. Or you can make in-session offers for online training or guided support when a user appears to be struggling in a particular area. You can even take a look at specific actions or search queries that often trigger support calls, and improve efficiency and customer service by automatically serving up messages with links to helpful content and tips that address these common customer challenges.



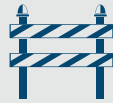
HostGator displays callout messages that appear based on behaviors — in this case detecting keywords or phrases associated with commonly encountered problems. Once a potential problem arises, it dynamically presents messages to direct the user to the most appropriate resources. With this approach, the company has eliminated thousands of unnecessary support calls and online chat sessions.

👍 ADVOCACY AND FEEDBACK

Capture Customer Feedback

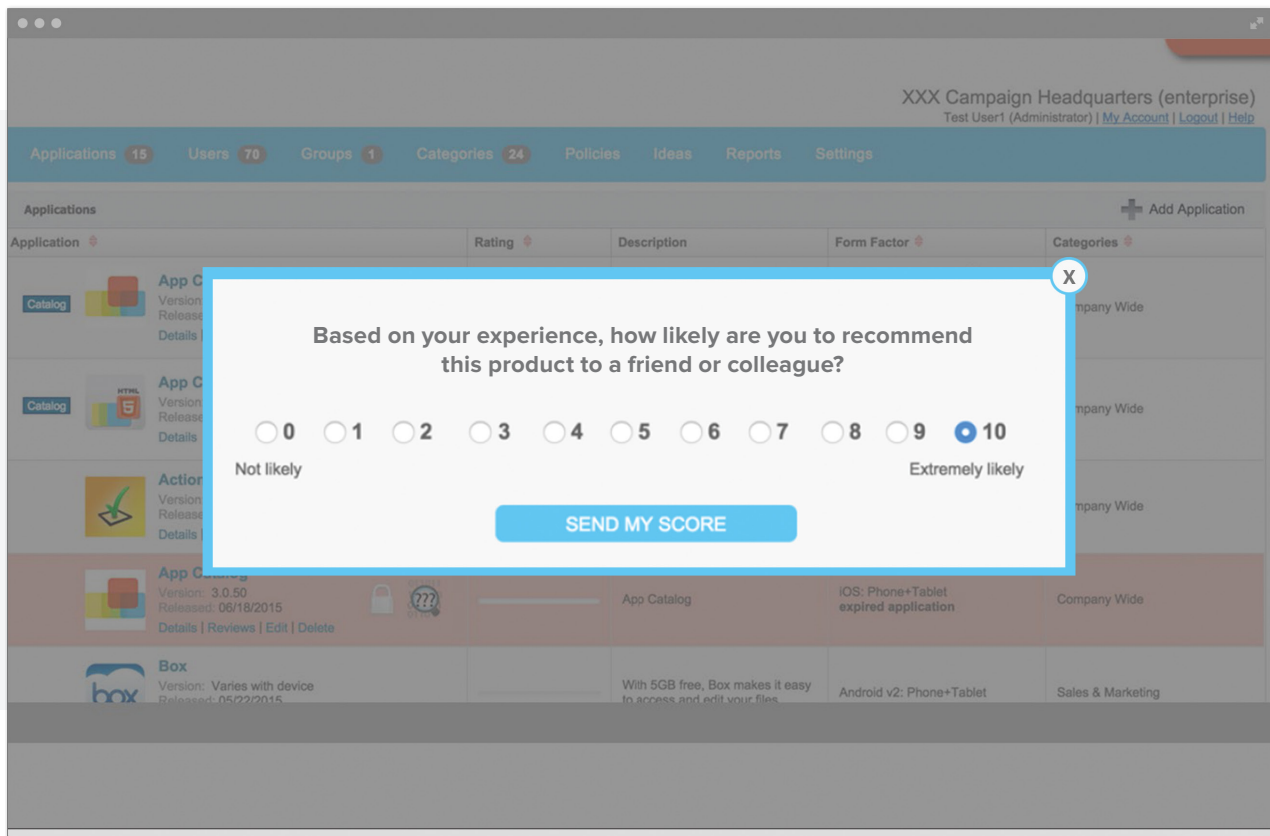
CHALLENGE

The ability to collect feedback and use the information to make improvements to your product or service is critical to the growth of your business. Companies use a variety of methods to maintain a feedback loop with their customers such as user groups, periodic surveys, customer advisory councils, interactive forums and knowledge bases. But these methods lack immediacy.



SOLUTION

Real-time personalization allows you to communicate with customers in-session and capture feedback when they are engaged and using your product. Analytics enable you to monitor real-time user behavior for a better understanding of how users are interacting with your product or service. And the opportunity to engage using real-time surveys and forms will provide direct and immediate input you can put to immediate use with relevant, personalized experiences or messages in response.



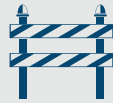
After conducting A/B tests to find the best approach, a mid-sized mobile application management and security platform saw a 2x increase in NPS survey responses when presented at the appropriate time within its web app. The company then follows up with a relevant in-app message and call-to-action based on the score received.

ONBOARDING, ADOPTION AND RETENTION

Identify and Reduce Churn Risk

CHALLENGE

One of the most important goals for B2B companies is to retain current customers and secure renewal contracts. So when a customer is not happy and potentially thinking about churning, you want to know about it. You want to be able to take prompt action when you can to save the relationship and remedy the situation.



SOLUTION

The key is to identify those actions or behaviors that indicate a customer is not happy or receiving sufficient value from your solution. These indicators are unique to each business, but common ones are when a customer's usage patterns change, they stop logging in or, more explicitly, they visit your cancellation page. You'll want to set up triggered emails to inform the right internal staff members quickly and seamlessly when these situations arise. You can also use in-app messaging or send triggered emails directly to the customer to offer a free consultation or, perhaps, offer a discount to continue using the service if the data shows they're about to cancel.



Thinking about canceling your subscription?

What are your concerns?

- Too expensive
- Not providing enough value
- Difficult to use
- Switching to a different solution

SUBMIT

When a user visits the cancellation page but does not cancel his subscription, this application displays a message with a survey question asking about their concerns. The appropriate customer success manager is then notified about the cancellation page visit and the answer to the survey question if submitted.

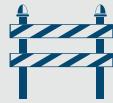


ADVOCACY AND FEEDBACK

Request Reviews or Referrals from Your Best Customers

CHALLENGE

One of the biggest untapped marketing opportunities in most companies is the customer base. Reviews and referrals can be immensely valuable in swaying on-the-fence prospects that your solution is right for them. The challenge is that many companies don't always know who their best customers are. They may have many users across accounts that they never speak with in person. How can you identify your best customers so you can leverage them in your marketing efforts?



SOLUTION

The best way to identify your most engaged customers is to observe how they interact with your online product or service. Set up your own way to track engagement to include any criteria you deem important, such as number of visits, specific actions taken, depth of engagement, etc. The customers with the highest scores are good candidates for advocacy activities such as case studies, testimonials or referrals. Then you can deliver an in-app message, a triggered email, or a notification to a customer success or marketing team member to follow up personally.



The screenshot shows the 'Engagement Score' configuration page in an 'ENGAGEMENT PORTAL'. It includes a search bar, a 'SAVE AND RECALCULATE' button, and several configuration sections:

- Choose Business Cycle:** A text input field for 'Days'.
- Weighting and Configuration:** A section to set relative weights for Visits (25%), Actions (20%), KPIs (26%), and Segments (29%). Each has a progress bar and a 'Configure' dropdown.
- ENGAGEMENT SCORE Donut Chart:** A donut chart showing the distribution: 20% Actions (orange), 25% Visits (blue), 26% KPIs (red), and 29% Segments (green).

When this tech company is interested in finding its best customers, it turns to its in-app engagement scores. Finding out which users are the most active gives them a starting point for reaching out to build deeper relationships. Very often those relationships turn into great success stories for marketing content and referral opportunities.

Help your prospects and customers navigate their own unique journeys.

Discover how personalization with Evergage can help you take your B2B marketing and customer success efforts to the next level!

About Evergage

Evergage's real-time personalization and customer data platform (CDP) delivers **The Power of 1**, enabling companies to transform the dream of 1-to-1 engagement, across channels, into reality. Combining in-depth behavioral analytics and advanced machine learning with data from your existing sources, Evergage provides the one platform you need to build a single, comprehensive view of each one of your customers and prospects and activate that data to deliver maximally relevant, individualized experiences – “in the moment,” across touchpoints and at scale.

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

