

This talk is all about how people experience your brand...
When a new visitor or a returning customer comes to your site — what do you want them to do next?

Today I'd like you to think about a **positive feedback loop between content & context**

- Context comes from knowing your customers
- Knowing customers' goals drives smart marketing + sales strategy
- Getting the right message to the right person at the right time
- Personalized content + good website UX engages people
- Turn visitors into leads & turn leads into loyal customers
- A positive feedback loop that drives business growth



Lance Willett

Sr. Director, Product Management, HubSpot



Lance Willett
Senior Director, Product
HubSpot CMS Hub

Agenda

Why personalized experiences matter to grow your business



How to provide relevant content at any stage of the customer journey

Examples of personalized content

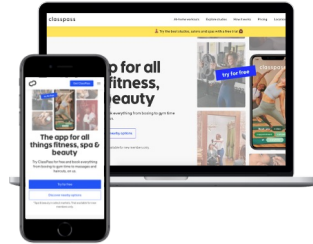
Ease-of-use personalization with CMS Hub



Why personalized experiences matter

 americaneagle.com +  HubSpot

We expect our digital experiences to be
seamless and personalized



 americaneagle.com. +  HubSpot

These days, we all expect digital experiences to be seamless and personalized.

The bar is high!

Companies like Amazon, Netflix, and Uber have set a new standard for smooth, 1-to-1 experiences.

And with a new bar set - everyone now expects that same experience from any type of company...

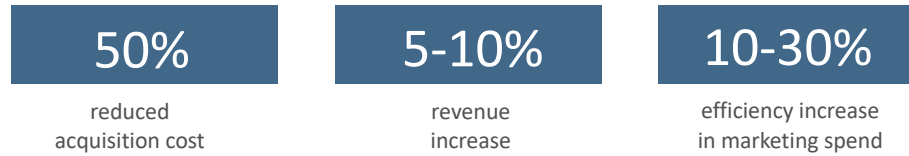
.... Mid-market, SMB, B2C or B2B. Doesn't matter - the expectation is the same.

But here's the beautiful part:

Building world-class personalized experiences is not only good for the end customer, but also for the company!

Digital Personalization

Marketing's Holy Grail



Source: [McKinsey Digital](#)



McKinsey calls personalization, “The Holy Grail”.

They cite a recent Harvard research study shows personalized experiences can reduce:

- Acquisition costs
- Increase revenue
- and increase efficiency.

WOW!

Source: <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/marketing-holy-grail-digital-personalization-at-scale>

Improving digital experiences is top of mind for companies

What are the key actions your firm is taking to achieve your objective of improving the experience of your customers?

- Improve online customer experiences
- Improve the value of our customer engagements
- Transform our culture to be more customer-centric
- Add or improve CX measurement
- Add or improve mobile CX

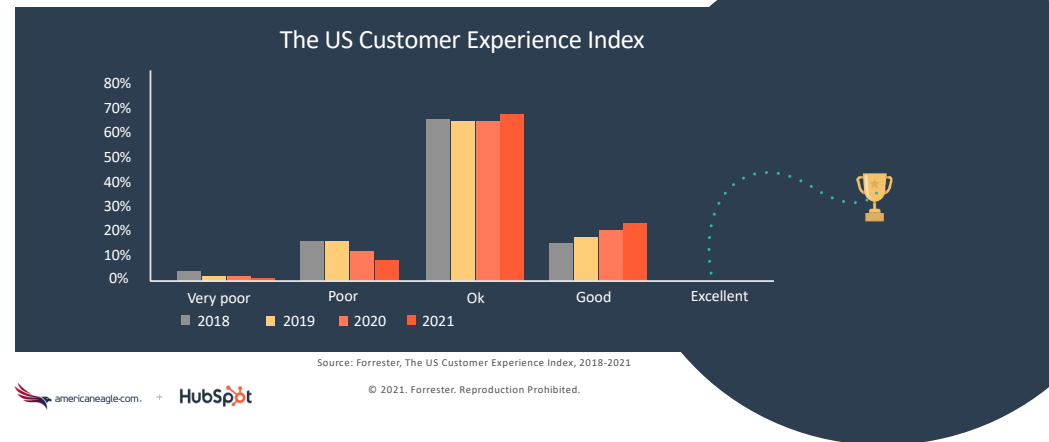


Base: 2,052 purchase influencers who indicate that improving the experience of their customers is a priority for their organization. Top 5 responses shown.
Source: Forrester Analytics Global Business TECHNOGRAPHICS® Priorities And Journey Survey, 2023
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The good news companies are taking notice and prioritizing!

In a 2022 Forrester study, companies cited their number one place to improve overall customer experience is ONLINE!

But companies have work to do



But there is work to do!

When Forrester surveyed end customers:
The majority of customers cited their experience as “ok”.
It’s fine. Nothing to write home about.

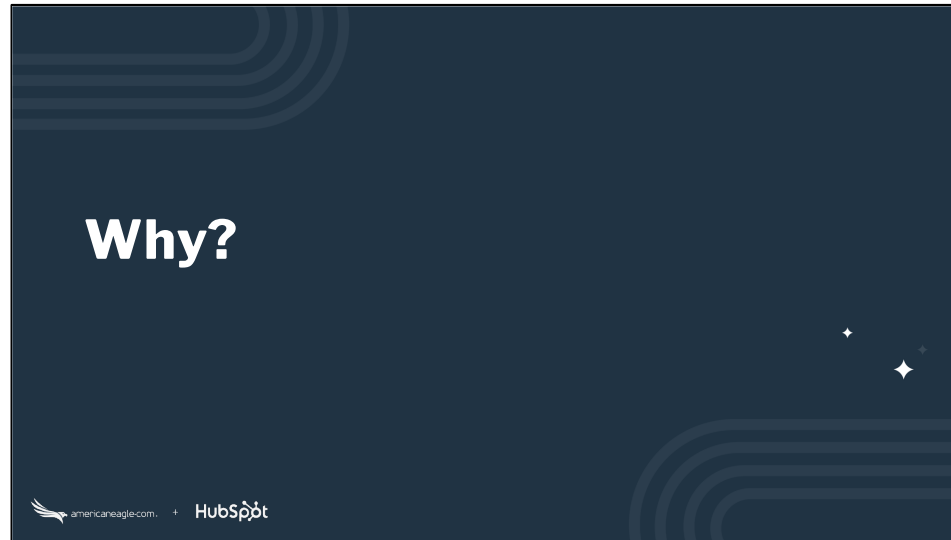
Depressing? - maybe.
But I see this as EXCITING! - Why?

Because this is our opportunity! - Think about it:

1. Customers expect seamless digital experiences.
2. Good experiences impact the growth of the business.
3. Companies are prioritizing specifically online experiences.
4. But we have work to do... and

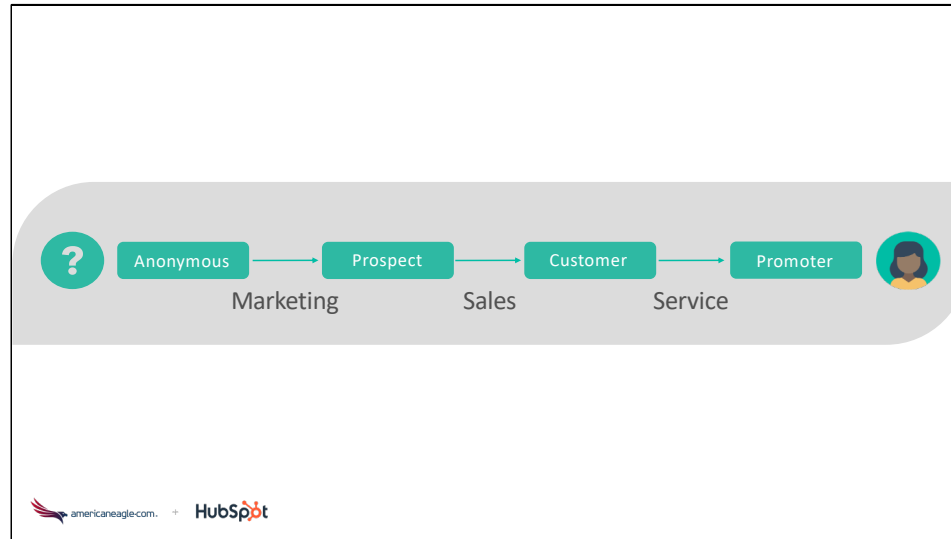
This is what American Eagle + HubSpot — and your CMS of choice come in

- Educate, guide, and help you implement these world-class personalized experiences



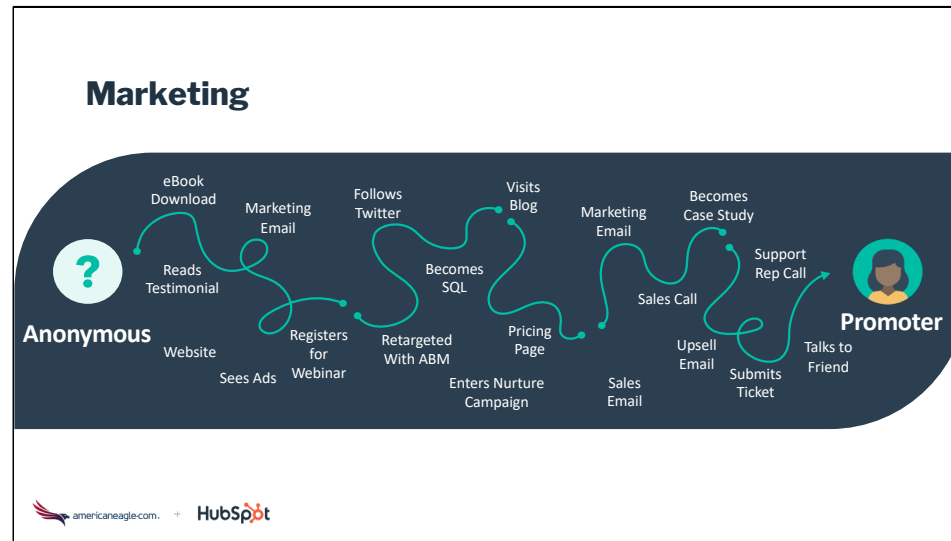
Many companies have an overly simplified view of the customer experience.

It looks something like this...



It looks something like this...

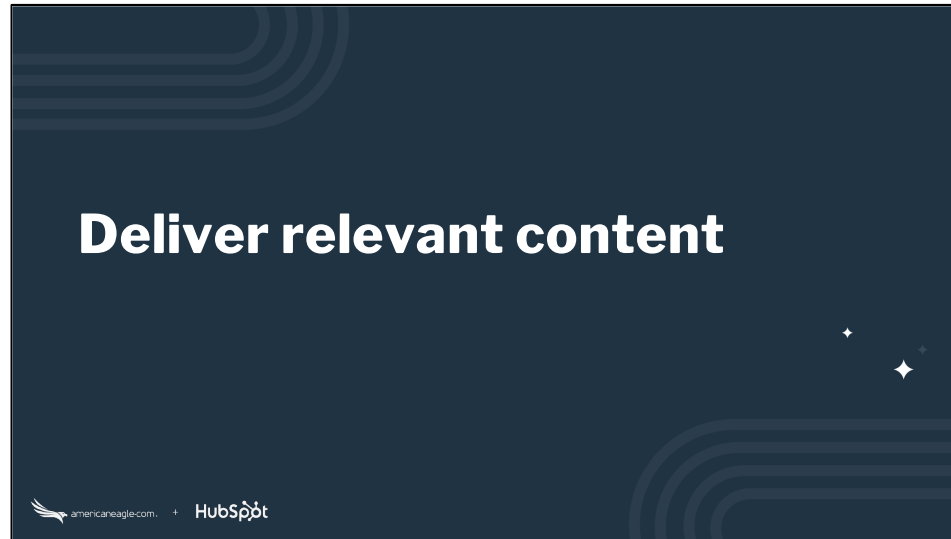
- Very linear with distinct steps
- Each department has strict ownership of a step



And the journey isn't linear

- It's really a complex, twisting journey with many touch points
- With lots of opportunities to win or lose customers along the way

This is our opportunity to use content + context for a better experience

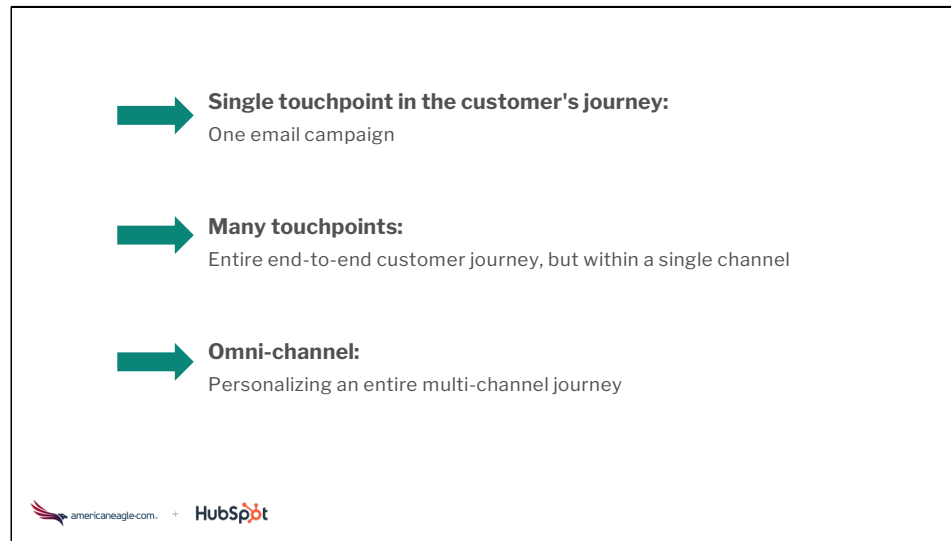


Let's start with how to think about providing relevant content at any stage of the customer journey

1. Touchpoints or channels
2. Levels of sophistication
3. Putting it all together to match your budget & needs

Personalization
levels as
touchpoints.





A single touchpoint use case:

Using “country”, as geolocation of a visitor, I want to create a localized Landing Page inviting a segmented audience to a local trade show or event

Remember: audiences vs solely CRM contacts

More complex journey-based use case:

I want to create a specific, personalized journey for customers who visited my website more than 2 times in the last 7 days without purchasing anything

- I want to send an SMS telling them that one of the items they browsed is now 10% off
- If I don't have their phone number, I want to send them an email with the same offer
- If no email, send a web push or pop-up CTA

Craft unique experiences to:

Reach the *right person* with the
right message at the *right time*



Personalization at its core is about creating a unique experience to reach the right person with the right message at the right time

for B2B uses cases: we want to know the stage of their buyer journey — from consideration to purchase

Who:

A specific audience or single customer we want to reach. This is where it all starts.



Example:

A segment of anonymous visitors to our website who've come to the same page twice in the past 2 weeks.



What:

A unique message, set of messages, or end-to-end experience.



Example:

A discount code for a webinar that I want to offer to visitors.



Where:

A specific touchpoint or channel.



Example:

A webinar landing page.



When:

A specific time.



Example:

After they've taken a minute to read through the details of the webinar.



CTA

I want to give a 10% off special offer to these repeat website visitors who have visited the site once before in the last 14 days, to increase their likelihood to buy

Personalization as
levels of
sophistication.



one-to-**one**

one-to-**few**

one-to-**some**

one-to-**many**

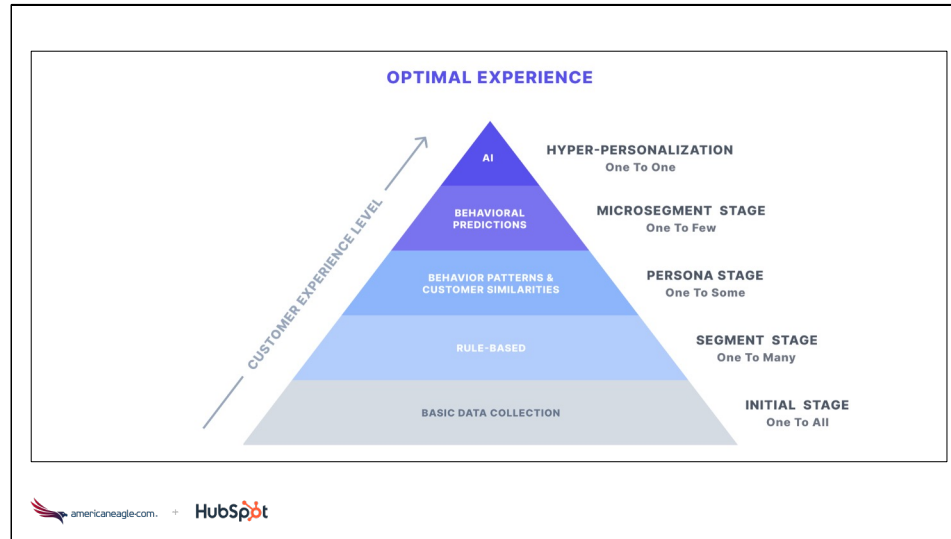
one-to-**all**



Personalization delivered at stages of sophistication:

Depending on the level of granularity, personalization can be delivered at one of five stages of sophistication: all, many, some, few, and one.

No matter how high-level or how granular we're looking at personalization, we need to always look at these four.



At each of these levels of experience, personalization increases based on knowing your customers' goals and context

A **one-size-fits-all approach won't work** to increase visitor and customer engagement

Instead, use personalized content based on people's demographics & behavior as you move up the sophistication level

[Source:](https://ninetailed.io/blog/personalization-maturity-model-segmentation/) <https://ninetailed.io/blog/personalization-maturity-model-segmentation/>

Build a seamless
customer journey

from **anonymous visitor** to
active promoter.



Take advantage of personalization to **unify and improve each step of the customer journey**, from anonymous visitor to customers to active promoters

1. Map out the **ideal customer journey** and know your buyers' goals.

2. Create content that **matches each buyer persona.**

3. Use forms and chatbots to **collect information** about your visitors.



How?

Track visitor data
and actions
as **context.**



Saving all their details **to the CRM...**

Tracks visitor activity on your website
to help you **build context**

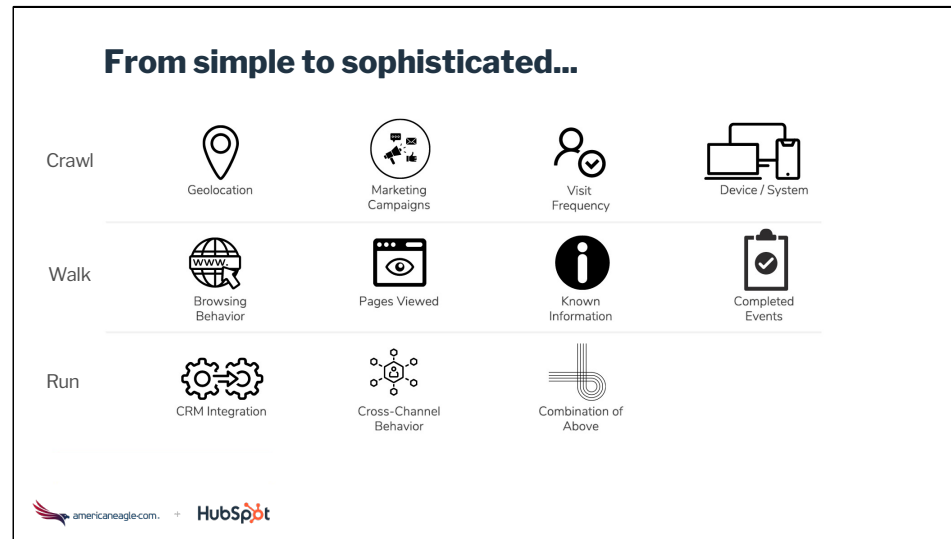
Expands your **marketing + sales strategy**



When possible, remember a visitor from previous visits without being too obvious about it

Guide them to the next content or action you want them to take

This context comes from knowing they've visited your site or page before...




Put it all together

Here is a model for implementing personalization at various stages of complexity from simple to advanced

- **Crawl:** geolocation, marketing campaigns, visit frequency, device/system
- **Walk:** browsing behavior, pages viewed, known customer/company info, completed events
- **Run:** CRM integration, cross-channel behavior, *(combination of the above)*

Source: <https://www.acquia.com/resources/e-book/you-know-you-need-personalize-now-what>

Personalization examples

 americaneagle.com +  HubSpot

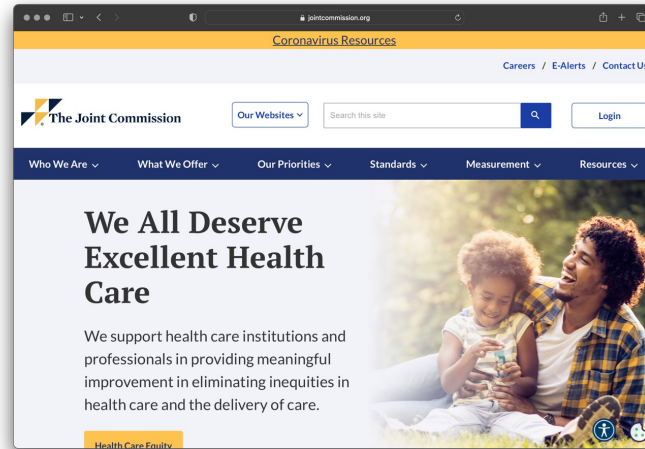
Example 1:

Location-based results



Example 1: Create location-based page results

**The Joint
Commission**



marketplace.com - HubSpot

<https://www.jointcommission.org>

Implicit personalization

The Joint Commission

Governing org for hospitals that uses buyer personas plus location

The Joint Commission

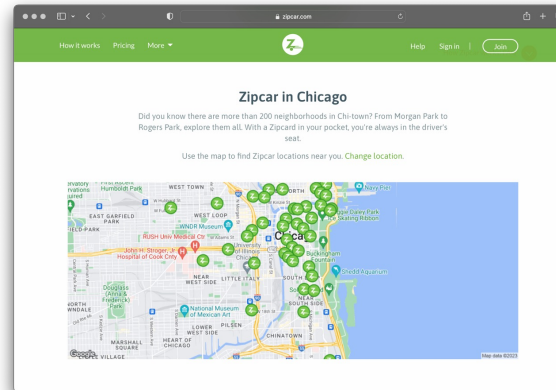


marketplace.com - HubSpot

<https://www.jointcommissioninternational.org>

ZipCar

Local map with neighborhoods and landmarks.



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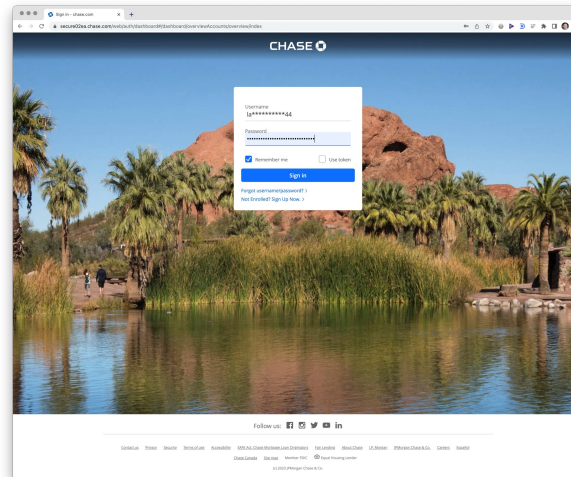
Communicate specifics to make content personal & actionable
(Example: Weather.com already knows my location, sets a smart default)

Tailor programmable content for any known visitor
(Examples: PBS.org asking if KUAT is my local TV station when I load the mobile site for the first time; and Stitch Fix knows my preferred styles based on previous visits)

Use smart defaults to fall back to general
(enter your zip code, if not already accurately shown)

Chase Bank

Local landmarks
on login page.



Nice use of geolocation (local landmarks in Phoenix, AZ)

Example 2:

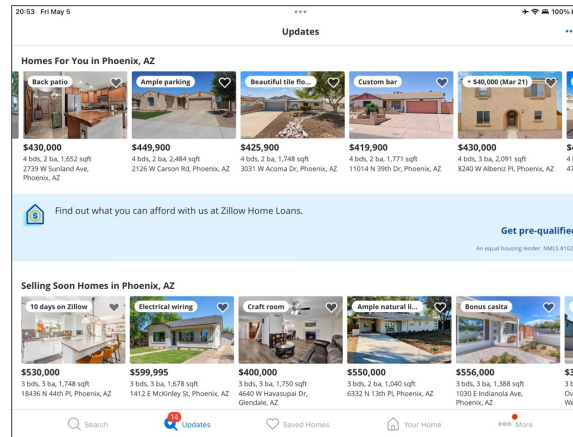
Recommended content

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Example 2: Suggest recommended content to prove value

Zillow

Recommended
search results.



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Example from Zillow.com: based on your search filters, here are two or three more results that might match you — yet are from a different neighborhood, not in your current map area

Tailor page content including form fields and CTAs based on what you know the customer or prospect is likely to want next

Shows that you are paying attention to their needs, in a sensible way

Example: Smartwool Socks: Come back to an abandoned ecommerce shopping cart; or, the product you were looking for is now back in stock, place an order now; “you might also enjoy” add-ons to complement existing purchase, such as Superfeet, extra laces, and leather cleaner for hiking boots

Example 3:

Buyer personas

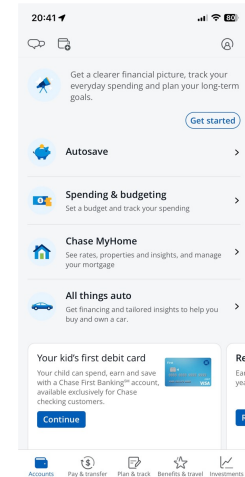


Example 3: Use buyer personas to reduce bounce rates and drive add-on sales

Chase Bank

Show specific content based on user context.

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First, use forms and chatbots to collect information about your visitors

Once they submit a form, track their activity on the website (data saved to CRM)

Example: Chase Bank uses reminder emails and in-app nudges to finish a signup or registration action — after you reached the confirmation page yet did not complete it, an email or notification is sent out, after a delay period, to remind you

- They add context from personal financial goals
- Buy a home; extend your credit; start saving more; etc.

To drive upsells for existing Chase Checking customers, I want to present to credit card only members specific content about setting up a savings and retirement account

Create modular, flexible content with sections that easily adapt to different buyer's needs

Example 4:

Repeat visitors



Example 4: Engagement tactics based on repeat site visits

Distinguish between new and returning visitors — vs logged-in customers

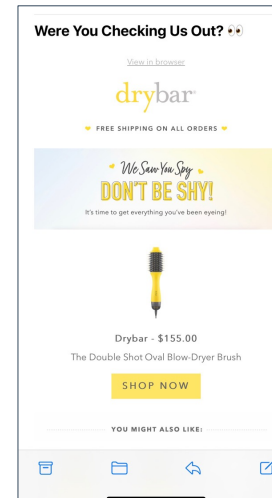
Track site visits, time-on-site, and common bounce points (exit)

Gradually work up to an offer — wait enough time in the beginning to be sure there is enough context

drybar

Visit a promo page
without taking any action?

We will send you a
cheeky reminder email.



Example: drybar (a hair salon) knows when you've visited a landing page to book a hair appointment, coming from an email promo — but didn't click the CTA; sends a "cheeky" email, "We caught you looking at this special!" After closing the site page without finishing action, an email is triggered to finish the action

If a known customer, use trust wisely to show you want them to take an action

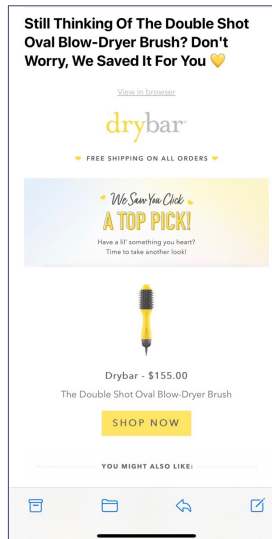
- Aware that loss of privacy, even a small misstep, can create serious consequences
- Otherwise, lean on a mix of general and specific CTAs

Another example: A dry cleaner that uses SMS messages to send tailored promotions to loyal customers, including discounts after periods of inactivity

drybar



A second email comes in,
this time with a more
personalized subject line.

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A second drybar CTA, this time more personalized (product name in the email subject line).

Ease-of-use personalization with HubSpot CMS

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Personalization
enhances a good
website experience.



Our goal as marketers and website builders is to deliver easy-to-use **and** personalized customer experiences

The tip of spear is the website experience — customer's **first entry** to your brand

Personalization simply *enhances* the experience with added context

It doesn't replace it...

Personalization gone wrong...

Bad Data & Poor Personalization

59%

of brands

Use out-of-date
information

57%

of brands

Get customers
personal
details wrong

 americaneagle.com. +  HubSpot

A recent [research study](#) showed that 59% of brands use out-of-date information about their customers

And 57% get customers' personal details wrong

Let me repeat that: 57% percent get customers personal details wrong!

Source: <https://www.sitecore.com/company/news-events/press-releases/2017/10/new-study-reveals-brands-fail-to-use-customer-data-to-deliver-personalized-digital-experiences>

Craft world-class personalized experiences



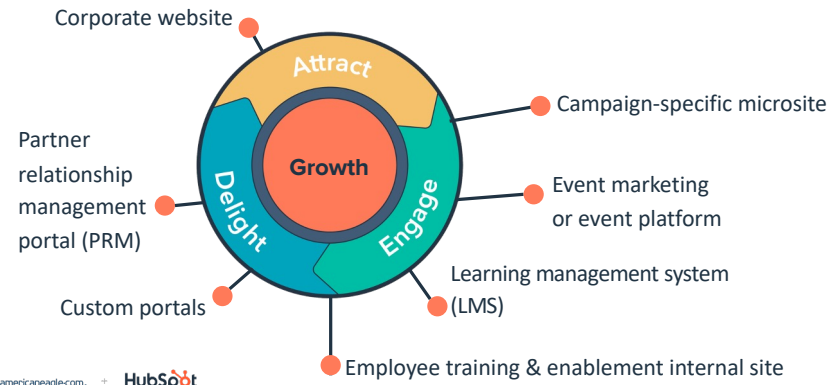
 americaneagle.com. +  HubSpot

Craft world-class personalized experiences with HubSpot, including

- The CRM as your unified data layer
- The CMS as your system of content
- Marketing Hub as your system of engagement

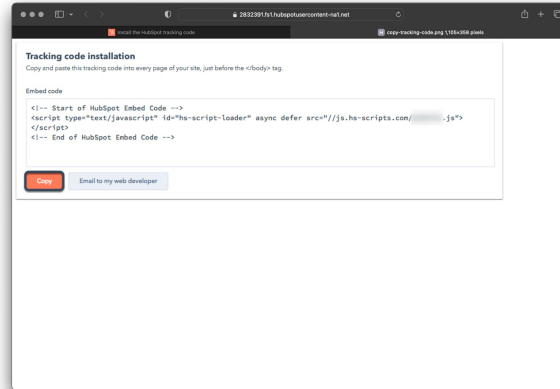
Built together right out of the box to create an optimal platform for personalized experiences

CMS Hub powers many types of digital experiences.



Tools

Tracking code for any CMS

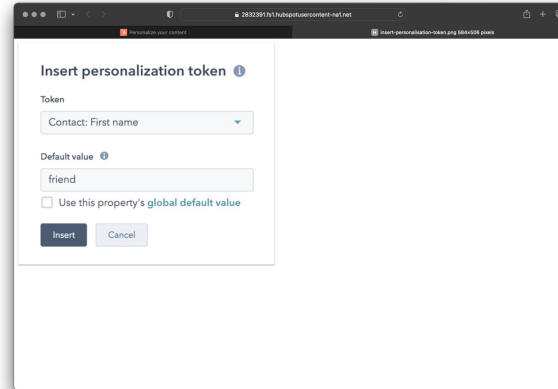


HubSpot tracking code (for any CMS, such as WordPress)

- Report on first-time and return visitors
- Know which content is getting traction and driving leads into sales
- Track referrals from ads, search engines, backlinks

Tools

Personalization tokens with smart rules for emails, landing pages, forms & CTAs



americaneagle.com + HubSpot

Personalization tokens with smart rules

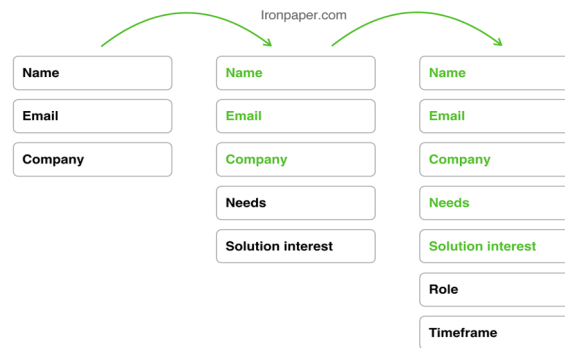
- These act as placeholders for customer profile data in any piece of content
- A well-placed personalization token can solidify a connection between your company and an individual

Principle:

Treat new visitors well while recognizing returning customers

Example: Create progressive forms with existing data

Example: Progressive forms



americaneagle.com + HubSpot

Progressive forms: using a marketer-friendly, no-code tool like HubSpot allows you to dynamically show form fields to each visitor and progressively build a profile based on small, simple questions.

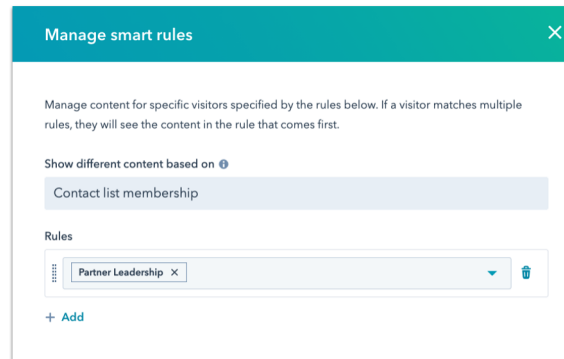
If you look at the example here, let's say I have an early stage offer like a webinar, the form I am showing this visitor initially will ask for their name, email, and company. Then, let's say they come back and are interested in a middle stage offer — I already know their name, email, and company — so, instead I am going to ask about their needs and which solution they are most interested in (topic of webinar). And, if finally they return a 3rd time and are interested in another offer, this could be another middle stage or late-stage offer — so now I am just going to ask about their role and timeframe. This progressively builds a profile for this user in our CRM.

You could also use this to build interest profiles. If you see behavior that shows an engaged user, use a pop-up form to ask them which interests they have, their role, or other information. The key here is to engage users without bombarding them. Building a profile over time for future visits with small, simple questions helps fill in personal data to you that can better tailor future content.

Graphic: ironsource.com

Smart Content

Personalize the customer experience based on CRM data, paid or organic source, device type, and more.



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Smart content creates variations of content shown on the page

- (for unknown visitors) based on ad source, country/location, device type, preferred language, query parameters, and referral sources
- (for known visitors) based on contact properties or lifecycle stage via CRM data

==

Tip: don't use in blog posts (for SEO & RSS readers, content needs to be canonical vs. tailored)

Tools

- Memberships (CMS Hub)
- Programmable email content (Marketing Hub)



And more!

1. Memberships (CMS Hub): Leverage membership-driven experiences to go beyond simple password-protected pages to create individualized content and experiences
2. Programmable email content (Marketing Hub)
 - a. Generate dynamic content based on a contact's specific needs, interests, buying history, or demographics — just like a dynamic content on a website, but for email

Personalization drives business results

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Let's recap

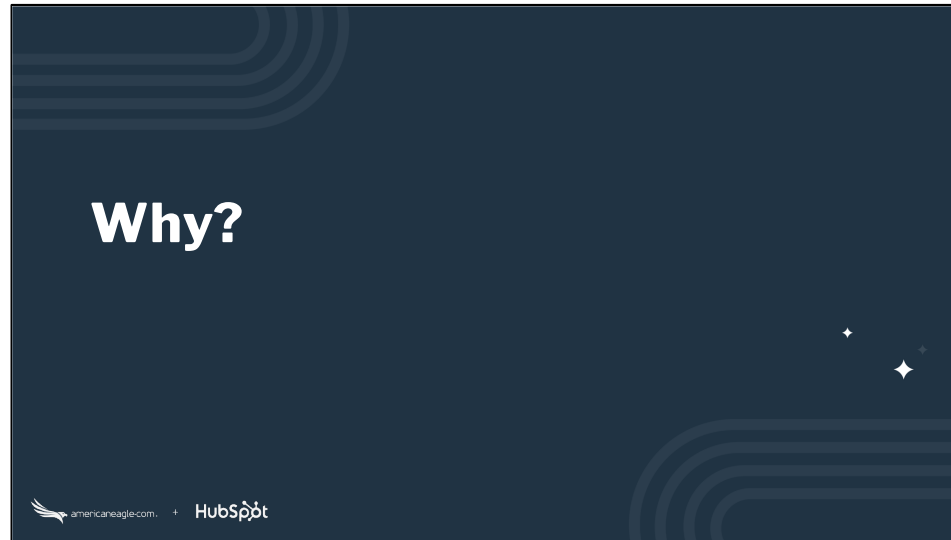
(Drive business results)

I believe all businesses should use personalization today to achieve higher ROI from their digital content

You'll see improvements across the board to:

- customer acquisition, conversion, retention, usage, and satisfaction

Build a durable business & grow revenue via loyal customers



Customers expect personalized experiences on websites, email, and all types of marketing messages

And when personalization is implemented correctly, business results follow

71% of consumers expect highly personalized experiences.



(Why personalization matters)

71% of consumers expect companies to deliver highly personalized experiences across all touch points (according to recent McKinsey research)

Research finds that when customers don't get this personalized experience, the majority of them end up frustrated

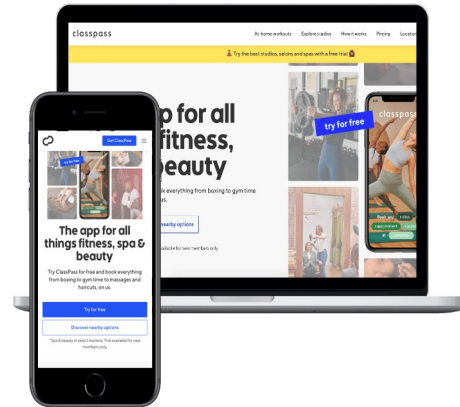
People want companies to learn from them to anticipate their needs

83% of consumers willing to share
personal data to enable personalization.

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Additionally according to an Accenture study 83% of consumers are willing to share personal data to enable personalization. Isn't that crazy consumers are so hungry for personalized experiences that they are willing to share their personal data?

The bar
is high.

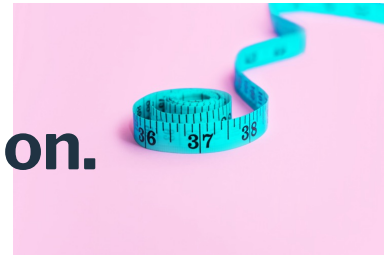


Is it really that surprising though? These days, we all expect digital experiences to be seamless and personalized

Tech companies and mobile apps have set a new standard for smooth, 1-to-1 experiences

The bar has been set high

B2B needs personalization.



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And with that bar set, everyone now expects that same experience from any type of company, Mid-market, SMB, B2C or B2B. It doesn't matter — the expectation is the same.

Consumers now see personalized journeys as being the default. B2B marketing leaders are increasingly understanding that personalized experiences are no longer a nice to have but a necessity.

Digital Personalization

Marketing's Holy Grail

50%

reduced
acquisition cost

5-10%

revenue
increase

10-30%

efficiency increase
in marketing spend

Source: [McKinsey Digital](#)



Personalization is the holy grail to build engagement and trust

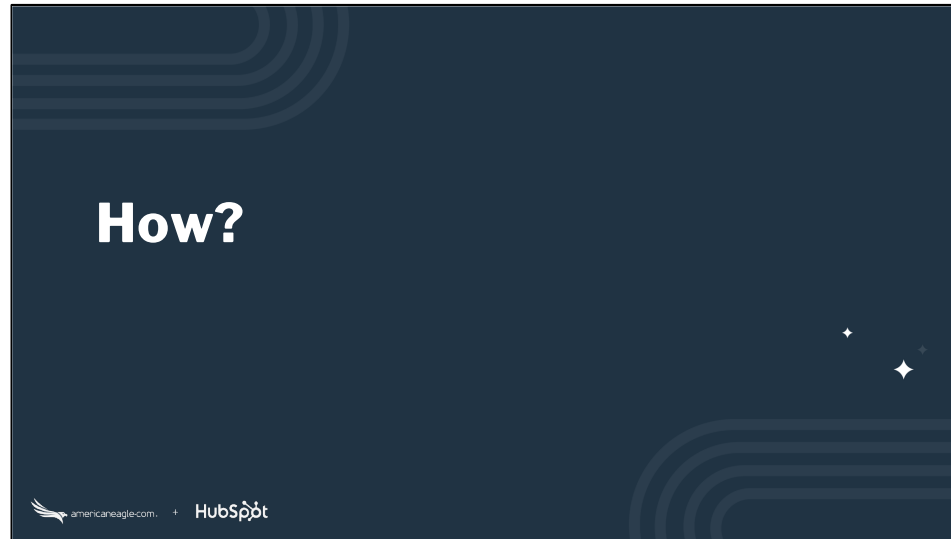
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Instead, use personalized content based on people's demographics & behavior

Personalized experiences can reduce:

- Acquisition costs
- Increase revenue
- and increase efficiency

Source: <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/marketing-holy-grail-digital-personalization-at-scale>



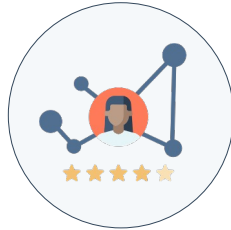
How to deliver relevant and seamless customer experiences via personalization?

Combine content + context for the right message to the right person at the right time

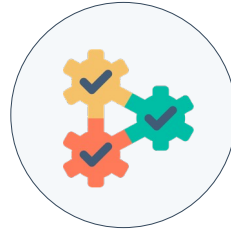
Just some examples we covered today:

- Treat new visitors well while recognizing returning customers
- Increase the click-through rates for CTAs on website and landing pages by tailoring based on known buyer goals
- Create progressive forms with existing customer data to build a profile
- Consider all stages of sophistication and various types of touchpoints — crawl, walk, run

Seamless customer experiences



Personalized &
easy-to-use experiences



At any stage of the
customer journey



All connected via a
unified data layer



How to do it right?

To me:

1. **Ease of use** matters as much as personalization
2. Leverage customer data for **any lifecycle stage**: prospect, qualified lead, and new/existing customers
3. Plan your contextual marketing and sales strategy on top of a CMS + CRM for a **unified view** of customer behavior

And, of course — use data & reports to measure success

If content is King,
then context is
Queen.



Remember one thing? Know your customers and their context

It's all about content + context

When a new visitor or a returning customer comes to your site. What do you want them to do next?

Tie your strategy and business goals to their expectations and goals

Summary

Context comes from knowing your customers

Knowing customers' goals drives smart marketing + sales strategy

Use personalized content + good UX to turn leads into customers

Deliver the *right message* to the *right person* at the *right time*



(...in summary)

- Context comes from knowing your customers
- Knowing customers' goals drives smart marketing + sales strategy
- Personalized content + good UX engages people
- You can turn visitors into leads & turn leads into loyal customers
- Deliver the right message to the right person at the right time

A positive feedback loop that drives business growth



Thank you!

Lance Willett

Let's connect on [LinkedIn](#) and [Twitter](#)

<https://www.linkedin.com/in/lancewillett/>
<https://twitter.com/simpledream>

Lance Willett
Senior Director, Product
HubSpot CMS Hub