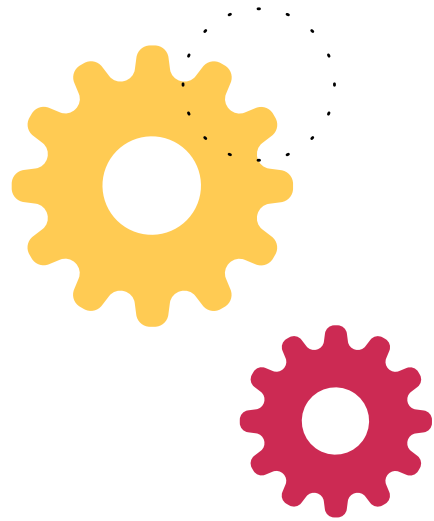


The Essential Guide to

End-To-End Personalization

Delighting Modern Shoppers
with Data-Driven Relevance



1

Introduction

Personalization need not only apply to one or two customer touchpoints, say a homepage banner or a mobile push notification. From social media advertising to checkout page fulfillment options, each commerce touchpoint offers frontend and backend opportunities for personalization. In fact, organizations see the best business results when personalization is applied to every customer touchpoint across the end-to-end shopping journey. And end-to-end personalization works for the same reason hearing your name at a noisy cocktail party grabs your attention: the power of relevance and connection.

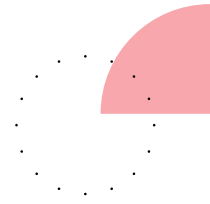
In short, personalization is about the formation of connections. It's about showing customers that you truly get them.

But that's been made more difficult in an omnichannel world, where the proliferation of channels has made it more complicated to deliver consistent and seamless customer experiences. To deliver true personalization, retailers and brands must truly *get* their customer base. And in order to do so they'll need to enlist a personalization platform that can help them crystallize behavioral and transactional data into a unified view of each shopper.



2

What is End-to-End Personalization?



A [recent article](#) noted that “...today’s shopper no longer tolerates siloed channels or touch points. They want a consistent experience across the board that provides real-time personalization.”

This quote sums up the importance of end-to-end personalization, an approach that uses personalization to influence the customer journey at every juncture and opportunity.

Presently, there are five stages to end-to-end (E2E) personalization, and they aren’t all content-based or marketing-related, and instead include transactional and fulfillment exchanges as well:



DISCOVERY The first touchpoint, where a new customer sees a personalized display advertisement or uses on-site personalized search to scope out your exposed inventory.



ENGAGEMENT Pre-purchase activity such as browsing product detail pages or reading customer reviews, all catered to a customer’s interests and behavior.



PURCHASE The transactional stage, which includes everything from setting up a customer account to selecting shipping options, curated for customer region, for example, and payment methods.



FULFILLMENT How the customer receives their goods, which has become much more complex in light of COVID. Options here including curbside pickup or ship-from-store.



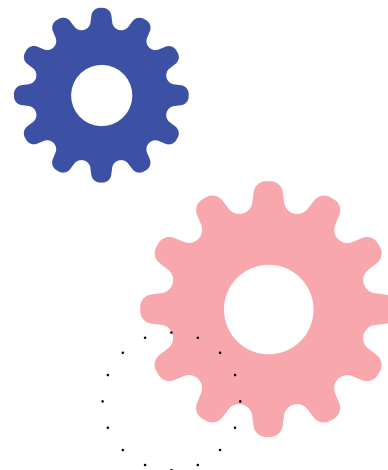
RE-ENGAGEMENT Restarting the cycle, either through targeted ads or personalized marketing outreach.



In each phase of the customer journey, it's important for retailers to assess the different experiences that their customers and prospects undergo and how the different stages relate to one another.

Retailers should think about how they're acquiring customers and optimizing their ad spend, which ladders into the engagement phase, where they need to consider complex customer intent and use 1st party or 3rd party data to create a relevant experience. Once the customer decides to make a purchase, it's important to deliver a frictionless experience, with orchestration on the backend, that leads to optimized fulfillment. Only then is it possible to expect re-engagement to occur.

3 The Benefits of Personalization



The right personalization solution will not only ensure that your customers have a better experience, it will also help reduce operational friction and earn you higher ROI in the process. In fact, companies that prioritize an end-to-end personalized experience are most likely to earn 400% ROI or more, according to internal Monetate research.

But, personalization isn't just about securing optimal ROI.

Think of each customer touchpoint as a turbo boost that can increase performance exponentially. For example, when personalization is used to engage new visitors on a homepage, it opens the door to deeper engagement. After the first homepage touchpoint, when personalization is used on deeper pages across the site, that



deeper engagement is more likely to lead to a sale. Similarly, when the purchase process is personalized, customers have a smoother experience which can lead to higher re-engagement.

The best E2E personalization approach is data-driven—from search behavior data that drives better recommendations during the engagement phase to real-time inventory availability informing correct shipping estimates at checkout.

With a focus on data, and a commitment to E2E personalization, retailers can expect:

HIGHER AOV

Personalized product recommendations during engagement, well-timed Buy One Get One (BOGO) promotions, and pre-approved installment payments are all examples of personalization that can boost Average Order Value (AOV) for each customer and each purchase.

BETTER CUSTOMER LOYALTY

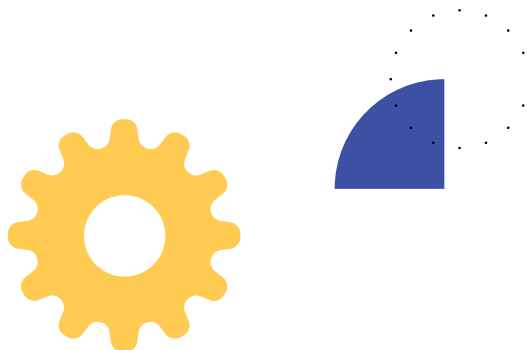
A retailer's best customers are their current customers, and personalization helps keep the door open with past customers. Using purchase data to send recommendations for matching items, or engaging content to trigger new ideas, personalization can keep the best customers coming back for more.

COMPOUNDED VALUE

Personalization is like a flywheel, once it gets going it drives value at increasing scale. Personalization for known customers on the site can yield insights that can be used to then create personalization for new visitors. By testing at every stage, each customer touchpoint can be fine-tuned to improve over time.

360 DEGREE CUSTOMER VIEW

With a data-driven approach to personalization, retailers will quickly learn more about their customer and their behavior than they ever had before. They'll start to uncover patterns and preferences that can inform strategies well beyond marketing and commerce.



4

Getting Started with Personalization

E2E personalization is the end goal, but every digital journey must start with a first step. The beauty of personalization is that it can be implemented in bits and pieces wherever it makes the most sense to tackle first.

For example, a retailer might need to personalize product recommendations within their mobile app in order to push inventory. Another company might decide it's most important to personalize imagery on their homepage to decrease bounce rates.

Each approach is correct, but to pave the way for an ever-expanding personalization strategy, it's important to follow these best practices:

Create a Short-Term and Long Term Roadmap: Take some time to envision your ultimate E2E personalized experience and determine what the benefits could be. Then look at your immediate goals; how will you evolve from what you want to do now to what you envision in the future? Create milestones to expand your capabilities so that you can achieve your long-term and short-term goals.

Establish Buy-In: With a plan, you don't have to worry about going to your boss with a one-off request, now you have a strategy. Use research-driven proof points and competitive examples to show exactly how personalization can drive value. Involve your C-suite if possible, which will help when it comes time to incorporate disparate data sources and get help from your development team.

Set Measurable Goals and Build a Strategy: Once the plan is approved, determine how each goal will be met, involve the right stakeholders and work backwards to ensure time is allotted for testing, integrations, and development. To make goals more real, develop use cases that can be directly applied to current customer experiences. Remember that your strategy should be omnichannel—personalization doesn't need to be limited to the website, or just to digital channels. This also applies to data; bringing all data together can unify your personalization efforts, the view of the customer, and ultimately, their customer journey.

Conduct a Data Inventory: Understand what is available and how it could be leveraged to achieve your goals. Some companies have a robust CRM that can be integrated into a personalization strategy, while others rely on 3rd party data or search behavior. Many others combine a bit of both. Be creative: call center data, information about product returns, and loyalty information can all add to a good personalization strategy.



Align on an Internal Governance Model: Make sure that stakeholders are empowered to operate as an autonomous “Personalization Task Force” that can prioritize new personalization efforts fairly against currently existing projects and priorities.

5 Benchmarking Success with Meaningful Metrics

Before you create an effective personalization strategy, you must establish a baseline to success. The best way to do this is with meaningful benchmarks. Any focus on metrics must tie back to your company and team KPIs such as conversion rate, add-to-cart, and bounce rate.

Good metrics have the following qualities:

1

They can be influenced through the implementation of personalization

2

They improve business results



In order to make the metrics even more valuable, however, think about them in two ways: internal benchmarks and external benchmarks.

Internal benchmarks are necessary to track your progress over time. Once you establish a baseline of performance, you can look for improvements or declines in performance to help understand which changes are working and which could be improved. Internal benchmarks can help you figure out if a dip in inbound traffic corresponds to a publicly announced change to Google’s search algorithms or a change in the data used for segmented ad targeting. They’re also necessary so you can measure changes made to the design of your ecommerce website, or if you change platforms.

External benchmarks help focus your testing and optimization efforts. Suppose your add-to-cart rates are 49%, but the industry averages are just 4%. That would suggest that you’re already doing great with that metric, and that it might make more sense to focus on those where you’re performing below your peers.



Building an End-to-End Personalized Journey

To further illustrate the kind of impact an effective strategy can yield, here are examples of E2E personalization across the five phases of the customer journey.



PERSONALIZATION IN THE DISCOVERY PHASE

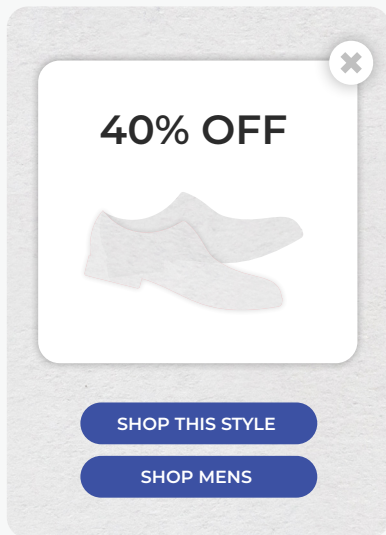
JoJo Maman Bébé reduced bounce rate through compelling homepage offers

CHALLENGES

- Frequently changing customer intent
- Entering a new market with unknown customers
- Driving traffic to stores for promo events, or for new opening whilst remaining for site visitors

SOLUTION

- JoJo Maman Bébé began with testing to better understand their customer base
- They then fed their customer data into Monetate Personalization and used AI to decide which content asset to show to each visitor on the homepage



JoJo used AI to decide which content asset to show to each visitor

JoJo Maman Bébé sells beautifully made clothing for moms and their children at every stage. They know that an expectant mother looking for maternity clothes is going to have a very different purchase journey than an experienced mom looking for matching holiday outfits for her children. While they had sophisticated content for their known customers, they were not personalizing to new site visitors, and were losing the opportunity to immediately engage during the discovery phase as a result.

They worked with Monetate to test their customer base to better understand how to segment their new site visitor audience using [Monetate Personalization](#). They then used Monetate Personalization's AI to deliver content for each new visitor on the homepage. These steps not only taught JoJo Maman Bébé more about the customers in the discovery phase, it created real growth, with a 124% increase in home page engagement and 25% increase in new visitor conversion.

Search is a touchpoint in the visitor journey, sitting across both the discovery and engagement phases. We know that visitors who interact with your on-site search are likely to convert at a 4x higher rate than those that do not. On top of returning relevant results, engage this valuable group of shoppers from the get-go. Think about displaying visual 'type ahead' recommendations under the search bar to improve the speed to finding what they're looking for.

Also think about the pages that your visitor lands on (with or without search), where you can dictate which products are displayed. Does the visitor have an affinity to certain brands, shown through in-session, or historical data? Or, are you trying to promote a new line or higher margin products? Either way, deliver a listings page that is most likely to deliver a result.





Helly Hansen saw serious results with slotted recommendations

CHALLENGE

- As a result of their global presence, and their specialization in a broad swath of apparel, Helly Hansen has a widely varied customer base. Therefore, the company needed to make sure the shopping experience would be as relevant for a Spanish sailor as it would be for a professional skier in Colorado or a commuter in London

SOLUTION

- Used Monetate's easy-to-use platform to test, segment, recommend, and automate personalization
- Set up slotted recommendations for new visitors, who were shown recommendations based on trending and popular items
- Product recommendations split into menswear vs. womenswear for both warm and cold weather gear



Helly Hansen used slotted recommendations to deliver targeted, engaging experiences to new visitors

Helly Hansen is a global outdoor retailer with apparel and gear for serious sailors and skiers as well as weekend hikers and urban enthusiasts. Their on-site experience can be complicated because of the various personas that Helly Hansen sells to, and so the team wanted to improve the engagement phase with better segmentation and personalized content.

They used Monetate Personalization to learn more about site visitors and test different product recommendations, content, and images to more quickly move customers to the right parts of the site. Through testing, they found that segmentation based on more nuanced seasons and weather signals really paid off. Compared to their older generic “sailing in summer, skiing in winter” approach, personalization decreased bounce rates and increased revenue per session by as much as 100%.





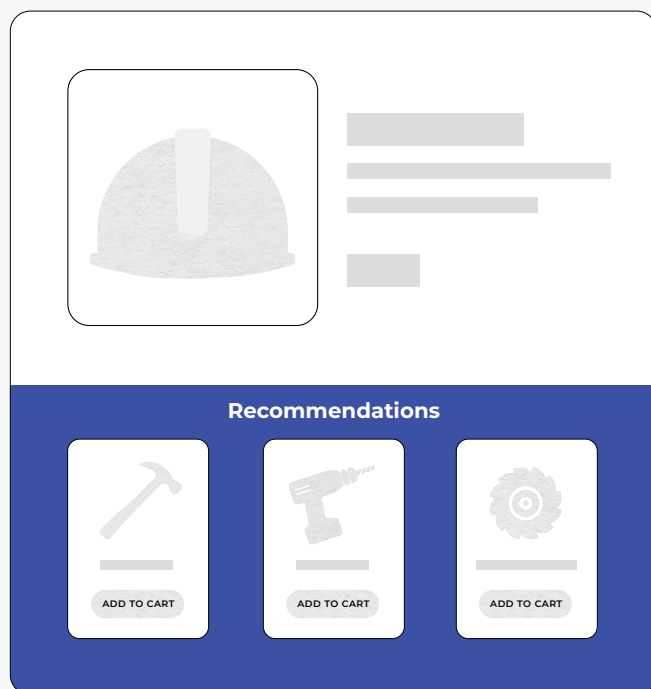
MSC Industrial Supply personalized product recs based on purchase behavior

CHALLENGE

- Catalog of one million maintenance and repair products made product discovery difficult
- Lack of personalization made B2B buyer journey long and complex

SOLUTION

- Product recommendations on the category page, product listing page, product detail page, and shopping cart page



MSC used customer data to inform AI-driven product recs across their site

B2B metalwork distributor MSC sells more than one million maintenance and repair products on their site, and so personalizing purchases with relevant product recommendations was an important goal for keeping customers engaged. They drew on a wide variety of product purchase data to create a plan for product recommendations across important parts of their site. They implemented Monetate Personalization's product recommendations on the category page, product listing page, product detail page, and shopping cart page, as well as an "add to cart" popup modal window. This equipped the website with relevant recommendations on pages with the highest visibility so that they'd have a big impact quickly.

MSC learned that the "add to cart" product recommendation feature was particularly valuable, delivering an increase in the purchase of recommended products and increasing site engagement. These learnings served as the starting point for an expansion of personalized product recommendations and other personalization elements such as promotions and banners that would further improve CX.

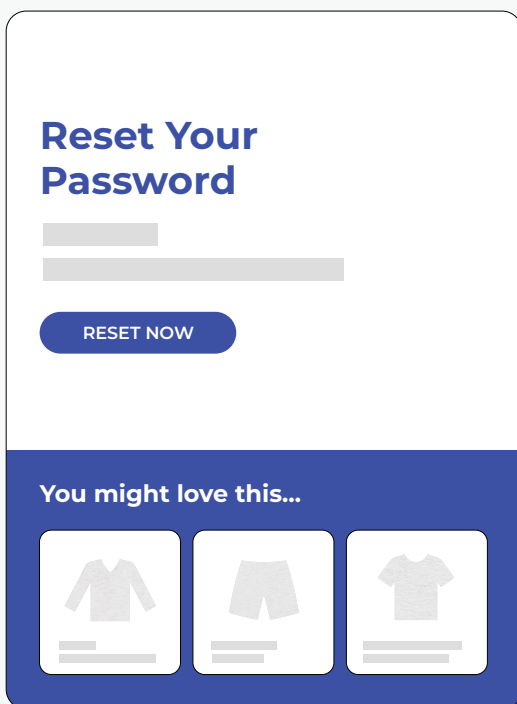




Retailer added recommendations to email re-engage

CHALLENGE

- Once a customer has finished browsing or made a purchase on your site, it is difficult to stay on top of mind when they are not directly exposed to your content or products



This retailer added personalized product recommendations to account password reset emails

SOLUTION

- Add product recommendations based on customer behavior to emails and have them served directly in your customer's inbox
- Include recommendations in any email, from syndicated campaigns to order confirmations
- Showcase recommendations with price, ratings & reviews, and other information

Just because a customer has received the product they purchased doesn't mean the transaction is over. There are many forgotten elements to the customer journey that are ripe for personalization, turning an often mundane transaction into an opportunity to connect.

Our women's retail client did just that, adding product recommendations to emails such as account password resets—creating an opportunity to deliver personalization right to a customer's inbox, and to surface available inventory.

Monetate makes it easy for retailers to upgrade their standard communications with a huge variety of information such as recommended products based on recent purchases, what's trending, or on sale. It's easy to test elements such as adding price or ratings and reviews to see what "clicks." For this retailer, the results offered a whole new revenue stream, with an uptick in email clickthrough of 20%.





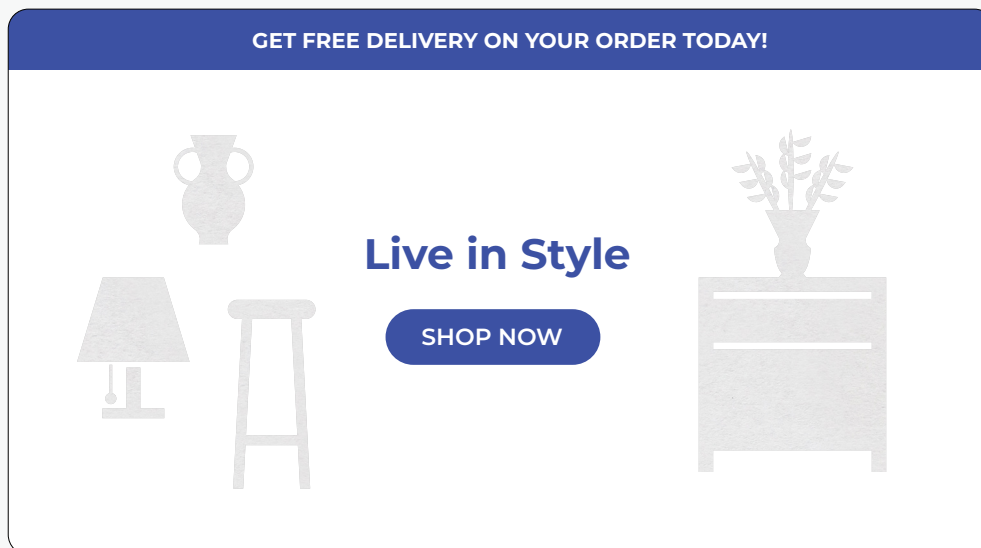
This retailer served targeted offers to grow loyalty

CHALLENGE

- Every additional purchase that a customer makes strengthens their affinity with your brand and their likelihood of purchasing again. Encouraging customers to place orders continuously to build lifetime value is difficult

SOLUTION

- Target customers based on when they last placed their first order
- Test customized offers, such as free delivery, with this segment and identify the best offer that encourages repeat purchases
- Isolate offers from each other to avoid confusing overlap in campaigns



They tested targeted custom offers to customers who made their first purchase in the last 6 months

Encouraging customers to place orders continuously to build lifetime value is difficult. As a result, to grow lasting customer loyalty, one retailer tested targeted custom offers to customers who made their first purchase in the last 6 months.

They tested customized offers, such as free delivery, and optimized around offers that encouraged repeat purchases. The results? An increase of 25% in average revenue per customer, as well as ballooning loyalty to their brand.



7

How a Unified Commerce Platform Can Help Your Personalization Strategy

Modern consumers don't forgive brands for not recognizing them on a mobile experience, or not acknowledging a recent purchase in one-size-fits-all promotions. That alone is justification enough for a unified personalization strategy.

Bringing disparate data points together to create a single view of the customer, orchestrating order management to empower customers with seamless purchase and fulfillment, providing ever-improving experiences by incorporating real-time inputs—these are all important components of modern personalization.

End-to-end personalization shouldn't be just a moonshot goal, it can be a reality grounded in organizational action. In fact, many retailers work with Monetate today for our modern platform that delivers a unified shopper experience from beginning to end.

Monetate's modular design allows you to get started with personalization and testing at the right fit, and grow over time as needed. **With Monetate, you can:**



Incorporate new data sources and connect to other platforms in your stack easily with our open, flexible architecture.

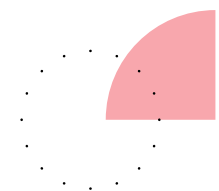
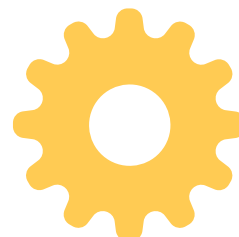


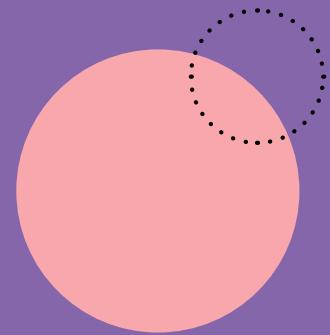
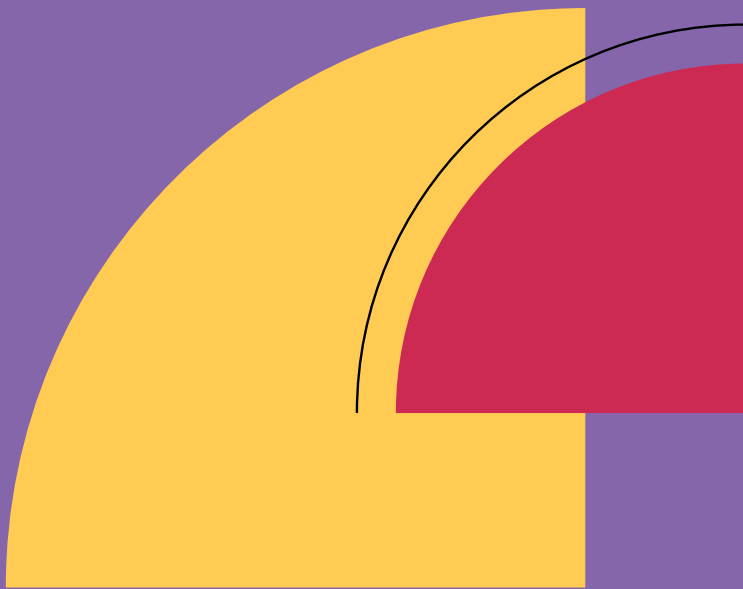
Add new channels to your mix as you mature your strategy.



Open new fulfillment options like curbside pickup with precision as you bring digital and store operations together.

Monetate makes it all possible at the pace that works for your personalization goals.





POWERFUL PERSONALIZATION

Monetate is shaping the future of digital customer experiences. Powered by patented machine learning, Monetate empowers organizations to use relevant data to make the most intelligent and personalized decisions across touchpoints. Capabilities such as testing and experimentation, recommendations, and automated 1-to-1 experiences give brands the ability to deliver the right experience at the right time to their customers. Monetate has incorporated powerful capabilities from Certona to provide the most comprehensive personalization solution, all within a single platform. Founded in 2008, with a presence in the U.S. and Europe, Monetate is trusted by leading organizations around the world and influences billions of dollars in revenue every year for top companies such as Reebok, Office Depot, and Lufthansa Group.

To learn more, visit [monetate.com](https://www.monetate.com)