



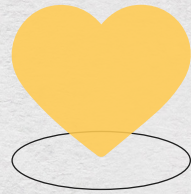
# THE UNRIVALED PERSONALIZATION PLAYBOOK

Learn from over 40 Monetate client-proven  
best practices all leading to millions in  
incremental annual revenues





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# Introduction

You're no longer the coolest, most informed marketer at the party if you know that optimization and personalization deliver substantial revenue lifts.

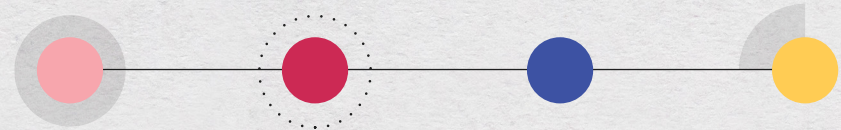
According to research from McKinsey, companies that grow faster are driving 40% more of their revenue from personalization when compared to their slower-growing counterparts.

But, contrary to the substantial evidence showing the impact of personalization, there's a serious lack of actionable help showing data-driven insights on where and how to deliver powerful personalized experiences across the digital journey.

Monetate has been helping forward-thinking, leading businesses exceed their KPIs and wow their customers for almost 20 years.

## **That's a long time.**

In this playbook, we've pulled together our greatest hits and best ideas from our extensive 20 years of experience working with [leading brands and businesses](#).



Monetate's powerful machine learning and automated personalization together with Certona's mastery of product recommendations are what makes us unique. It's where we've honed our best ideas and learned what it really takes to drive revenue and to perfect the customer journey.

It's all here in this single playbook. From your Homepage through Checkout, we're revealing the best practices and which exact experiences we've seen work for the best brands, including Reebok, Office Depot, and Lufthansa Group.

You'll also find definitions of the different tactics available, alongside our suggested key best practices when implementing optimization and personalization strategies.



# Definitions & Best Practices

When personalizing the customer experience, certain key tactics or strategies will allow you to get a firm grip on continually optimizing your site or app.

These elements are common to all the pages on your site and form an overall approach to an integrated personalization strategy.

**These are the tools that you should have at your disposal to use to improve the digital customer journey:**



Testing & Experimentation




Segmentation & Targeting



Automated Personalization



Product Recommendations



Personalized Search



Product Finder



Social Proof



Badging



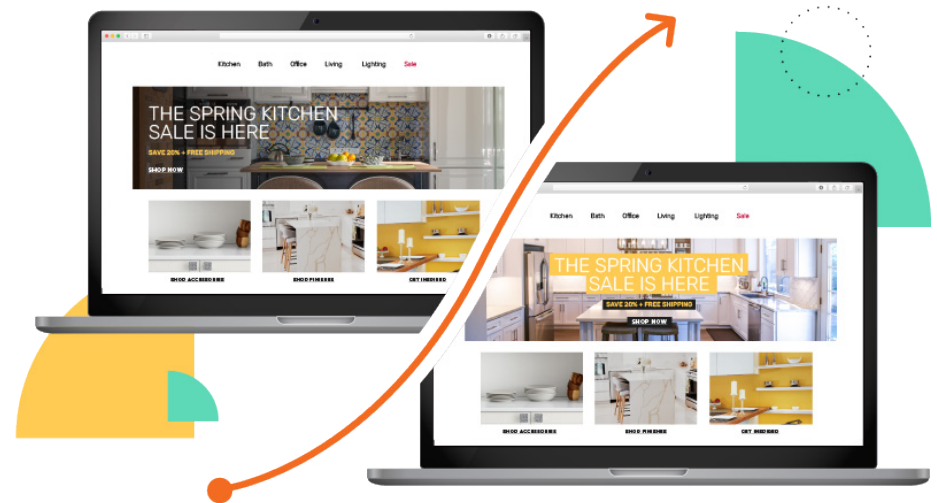


# Testing & Experimentation

Testing is a fundamental practice in any growth-orientated business with a digital presence, but especially in eCommerce. A/B, A/B/n, multivariate, or multi-armed bandit testing are all forms of testing and experimentation, all with different ideal uses. The desired outcomes vary between each type, but the core goal with testing is to validate that the changes that you intend to make, to an eCommerce site or app, are worth the investment.

Monetate provides a variety of testing capabilities from standard A/B tests, A/B/n tests, multivariate tests, client, server-side, or hybrid testing, and dynamic or (machine-learning powered) testing.

Our A/B testing tools are designed to make it easy to monitor campaigns, collect relevant data, and make better decisions.



## Here are some best practices for testing & experimentation:

1. It is crucial to ensure that you are measuring the correct goal. To do this it's useful to start with a strong hypothesis. It's also important to [select the correct type of testing](#), whether dynamic testing (multi-armed bandit testing) or A/B testing.
2. Testing should also be integrated into segmentation, recommendations, and broader merchandising experiences (social proof, badging, etc.) This way, you continually optimize these key customer touchpoints. Across all experiences, make testing a priority to continue learning, improving, and actioning upon what is working.





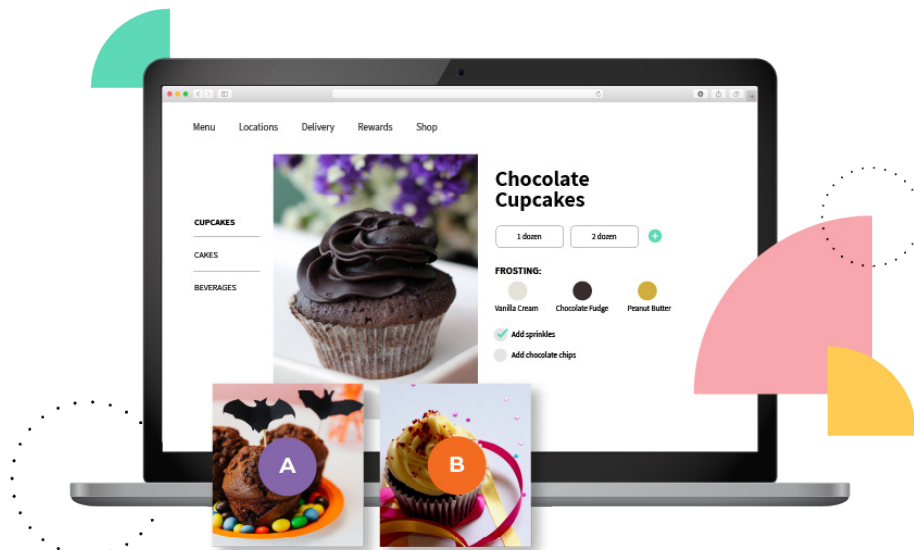


# Segmentation & Targeting

Segmentation is commonly seen as the next step after a business has gathered the low-hanging fruit from testing.

Segmentation, or 'targeting,' is dividing your audience into groups based on common characteristics (location, age group, etc.), behavioral traits, or situational circumstances, and delivering tailored experiences to that sub-audience.

Segmentation is a crucial element of a well-orchestrated personalization strategy.



## Here are some best practices for segmentation:

1. A great place to start is looking at splitting experiences between new visitors vs. those returning to your site (more on this later in the playbook).
2. A great segmentation use case is to target your VIP customers with tailored offers and personalized product recommendations.
3. Avoid targeting very small audiences. Smaller groups require more or the same level of effort and yield significantly smaller returns. At this stage, look to automated personalization. With automated personalization, you can deploy optimal personalized experiences across all touchpoints based on everything you know about them.

Segmentation, however, can only take you so far. To fully optimize the customer experience, you need to go further (see Automated Personalization).







# Automated Personalization

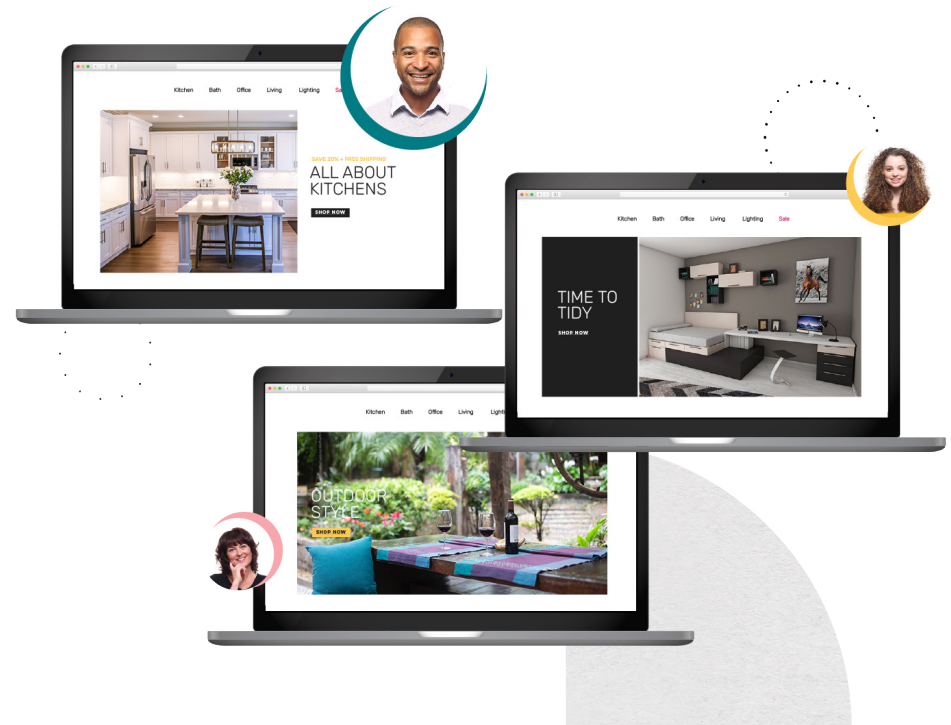
Whether your customers have just landed on your home page or are about to hit the checkout from your product page, you need to show them the right content or product at the right time. That means delivering hyper-personalized experiences to each and every site visitor.

## Here are some best practices for getting automated personalization right:

1. Choose an appropriate goal for the engine to optimize toward. For example, an experience on the homepage would have bounce rate, or click-through rate (CTR) as the goal metric, not conversion.
2. As with all machine learning engines, the more, and the better-quality data that you input, the better the output.

You need an advanced, open, machine-learning powered solution to enable automated personalization at scale. Without an advanced machine-learning engine 1-to-1 personalization just isn't possible. Fortunately, with Monetate, it is.

With Monetate, 1-to-1, or automated personalization can be applied to any digital interaction to optimize towards your given goal.







# Product & Content Recommendations

Product and content recommendations give merchandisers and digital marketers the power to show contextually relevant products, services, or content suggestions to audiences. Recommendations are multi-faceted and come with varying degrees of sophistication and a multitude of different capabilities that can be used.

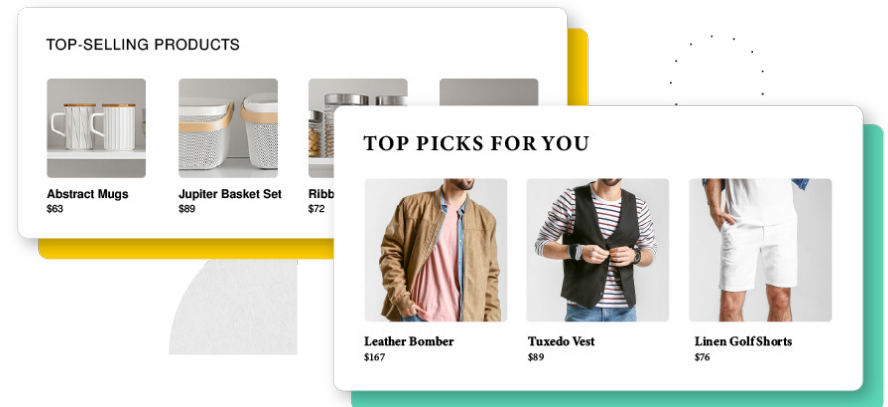
Recommendations can be based on the attributes that you have assigned to your products. These include brand and model numbers, product titles, ratings/stars, price, design variations, and more.

Merchandisers can also lean on automated algorithms to know what content/product will be optimal for each customer on an individual basis.

Capabilities like slotting & predictive slotting provide manual control or automated decisions over the individual slots within a recommendations container.

With a strong recommendations solution, users can also set business rules to boost or bury products based on whatever criteria are needed to help a business such as promoting a new product line or burying low-margin items during key periods.

Digital marketers should also consider building curated product sets with automated product bundling. In this scenario, merchandisers can help customers “Complete the Look,” by suggesting complementary products for purchase.



## Here are some best practices for deploying effective recommendations:

1. Place recommendations above the fold.
2. Display 3 to 5 recommendations to not overwhelm visitors.
3. Exclude carted or wishlist items from the display.

To learn more about the 9 benefits of a recommendations engine, [check out our blog here.](#)







# Personalized Search

The rewards for delivering an accurate, seamless search and discover experience are massive. 43% of retail customers head [directly to the search bar](#) on a website ([Forrester, 2023](#)), and a report shared by Amazon showed that conversion rate increases sixfold when visitors do a search ([Nacho Analytics, 2019](#)).

If a business can improve the search and discovery experience, the impact on revenue and loyalty can be huge.

By personalizing search, we add relevance and remove friction to this key stage in the journey. From displaying results as soon as a visitor starts inputting terms, through to the hyper-relevant search outcomes, personalizing search covers multiple areas across the journey.

## The primary goals of personalizing search are to:

1. Provide more relevant search results for audiences, and;
2. Display or rank search results in an order most likely to help the searcher find what they're looking for.

## In Monetate, the search and discovery journey are covered and personalized by four fully intertwined solutions:



### SITE SEARCH

Delivering hyper-relevant results by personalizing the search experience for each visitor



### PREDICTIVE VISUAL SEARCH

Displaying instant visual results, based on behavioral outcomes as visitors type partial or full search terms



### PERSONALIZED CATEGORY PAGES

Dynamically sorting the product grid on category or subcategory pages for each visitor by analyzing in-session behavior to predict intent



### PRODUCT FINDER

Providing guided questionnaires that deliver filtered recommendations related to the customers' answers. Learn more about product finder in the next section of this playbook.



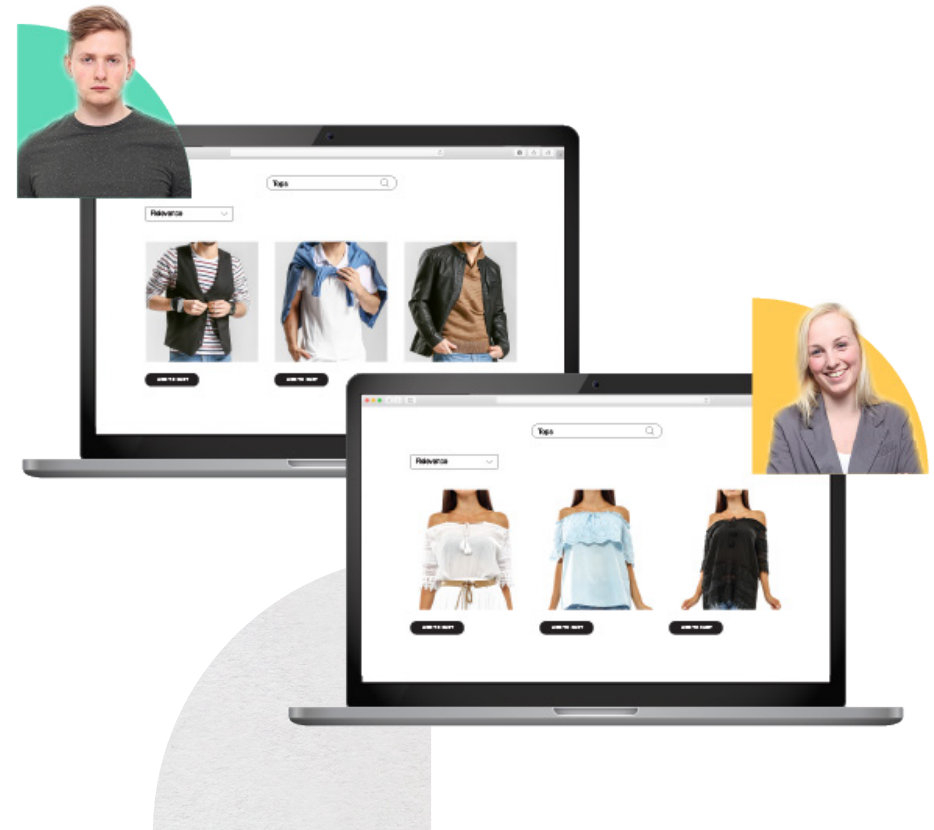


## Personalized Search *Continued*

### Here are some best practices for personalizing the search and discovery experience:

1. Raise the prominence of your search bar to encourage more visitors to interact with the search function (experiment, analyze and optimize to find the next results).
2. Bring search as a function into your wider personalization strategy to sit within your personalization team to remove data silos, improve merchandising opportunities, and more.
3. Analyze and share search data with key stakeholders to make other teams smarter about your audiences.

Monetate Personalized Search enables businesses to deliver hyper-relevant recommendations as search outputs, while also providing users with a healthy balance of manually defined control versus automation.







# Product Finder

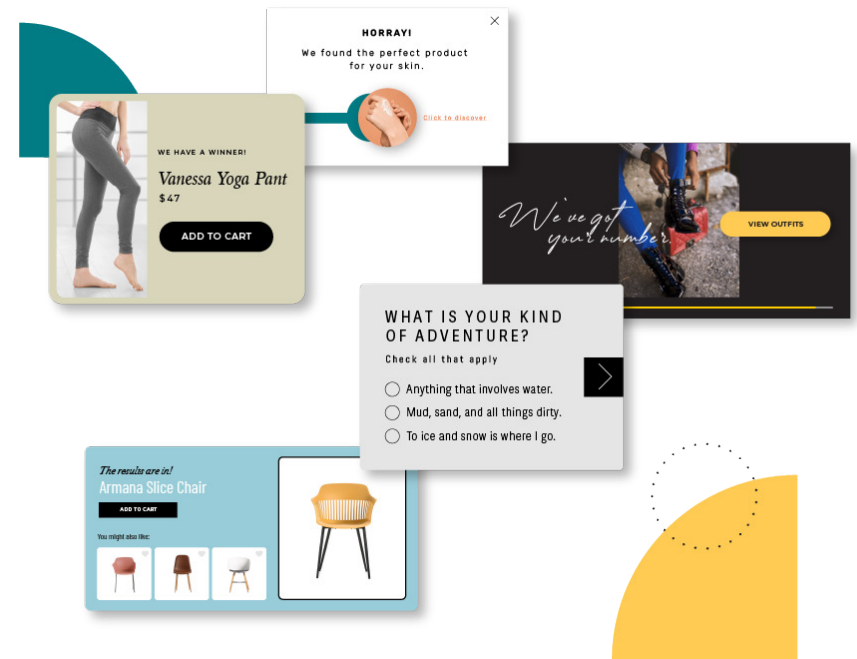
Customers are overwhelmed by choices. With a robust product finder solution, businesses can remove friction for audiences by helping them navigate toward a purchase.

A product or gift finder enables users to create a guided questionnaire that delivers filtered recommendations related to the customers' answers against a recommendation strategy that you, the marketer or merchandiser, select.

When building a guided quiz, keep the customer experience in mind. As a best practice, **keep the number of questions to 5 or less**. This will ensure that your customers will find suggested products quickly, and not get bogged down by a long quiz and abandon the product finder before receiving any results.

## Here are some best practices for product and gift finders:

1. Sketch or map out the path you desire audiences to take. This doesn't have to be linear.
2. When choosing your recommendations strategy (or algorithm), try not to over-filter the strategy, as this will be more likely to return a no-result.
3. Consider what recommendations you will display if the customers' answers deliver no results.



A strong product finder will turn shopper insights into immediate hyper personalized product recommendations. Guided shopping journeys improve the customer experience and deliver a significant conversion lift.





# Social Proof

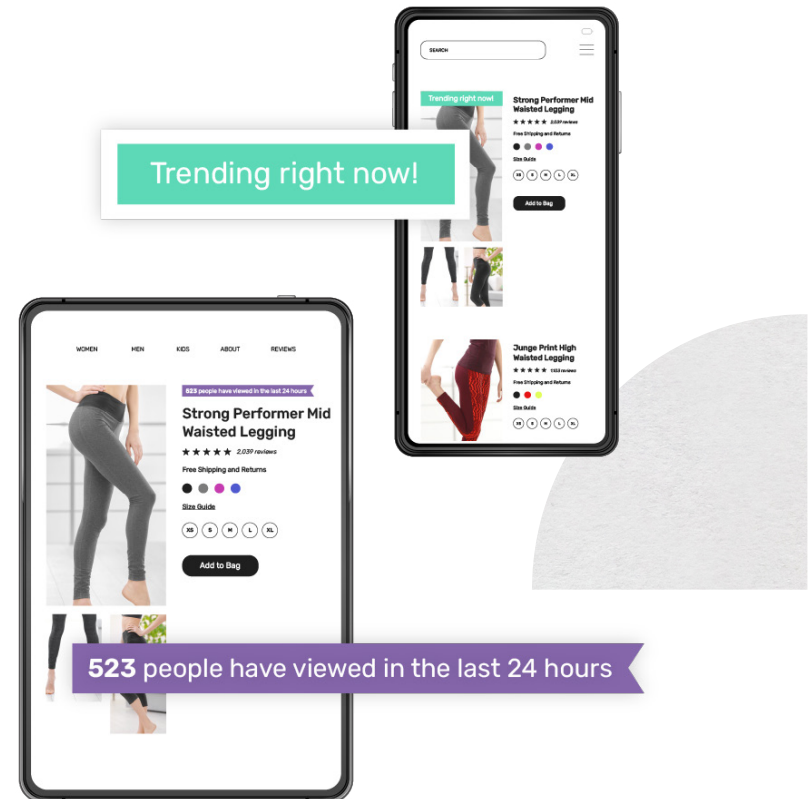
Those looking for a quick and easy way to boost conversions and engagement should look no further than social proof.

Social proof, as a psychological concept, says that people are more likely to do something when they see someone else do it. In the context of eCommerce, social proof elements help build confidence and motivate shoppers as they navigate the online buying journey.

eCommerce social proof uses crowd-mined data like views, purchases, add-to-cart, and ratings, to display messages or product badges that drive FOMO, urgency, and trust. **Basically, social proof works - so use it!**

## Here are some best practices for social proof:

1. When launching your social proof strategy, be sure to match the algorithm with the target persona or product (ratings for practical items, or purchases for gift items, etc.) As with most eCommerce decisions, it's also important to stay away from guesswork.
2. Test, analyze, optimize and target elements like placement, messaging and which algorithms you use.



Monetate Social Proof not only provides a robust toolbox of algorithms and data-points to use, but it is also easy to deploy, fully customizable and easy to test, target and personalize along with a broader digital strategy.







# Badging

Badging is a great tool for driving visitors down the funnel by building trust and highlighting popular, or top priority items. Use badging on recommendations or product images to create a sense of urgency or to boost your customer's confidence in continuing with the purchase.

The badges that do this best are:

NEW IN STOCK

BEST-SELLING

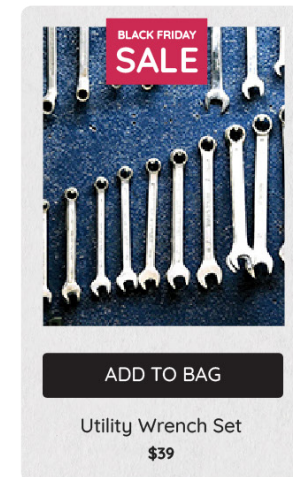
FREE SHIPPING

ON SALE OR CLEARANCE

LIMITED QUANTITIES

RELATED PROMOTIONS

A strong badging solution can be used as an integrated part of your wider testing and personalization strategy. With Monetate, it's easy to analyze, test, target, and personalize your badges to deliver more impactful results.





# From Start to Cart: Building the Digital Customer Journey



We've covered the different tools or actions that businesses can apply to improve digital channels. But how can you apply these tactics across the key areas of the digital journey?

- 1 **Homepage**

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- 2 **Category Page/Product Listing Page**

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- 3 **Product Detail Page**

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- 4 **Cart/Basket Page**

We'll explore each of these typical stages of the customer journey and will cover an overview, best practices, our favorite experiences, and even a few customer examples too.



1

## The Digital Customer Journey:

# Homepage

Buying decisions are not typically made on the homepage.

However, it plays a key role in shaping your visitors' experience, if they are inclined to buy from you, and the overall impression they have of your brand.

### First impressions count.

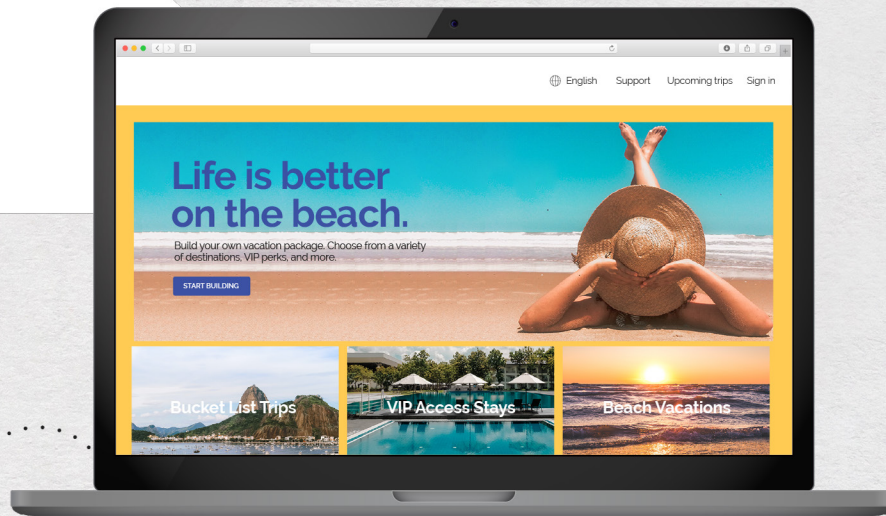
On high-traffic landing pages such as the homepage, **quickly engaging** customers with personalized messaging, offers, and product choices is crucial in reducing bounce rates and driving traffic deeper into your conversion funnel.

When your visitors land on the homepage, they want to find the product or information they're looking for as quickly as possible.

Getting engagement right means matching your visitors' intent with relevant content, recommendations, and messaging, so that you can guide them through your site.

Use customer data combined with pre-defined behavioral targets to identify a personalized customer journey that you want your visitors to take.

You can also use this information to personalize the creative content (banners, hero images, offers, etc.) on your homepage, or to suggest a next step like engaging with a gift finder. Different colors, wording, and offers can be tested and targeted at different types of visitors.





## Our Favorite Strategies for Improving the Homepage

- ✓ **Differentiate between a new visitor versus a returning visitor**, so you can provide tailored homepage experiences to each group.
- ✓ **For new customers**, (or for websites with top-trending products that frequently change), using recommendations to display popular products is a great strategy as it leverages the success of your best-performing products, exposing them to a wider audience.
- ✓ **For returning customers**, you can use historical data from the visitors' on-site behavior during their last session - such as products browsed, items placed in the cart but abandoned, or products purchased - to recommend products unique to a customer's interests.
- ✓ **Experiment with different layouts** using dynamic testing to optimize the landing experience while also maximizing ROI.
- ✓ **Encourage visitors to engage with site search**, or a product/gift finder to improve conversion rates by moving visitors down the funnel.
- ✓ **Create personalized landing pages** based on search keyword modeling (using UTM parameters, and Monetate features like AdLink). AdLink allows marketers to pull paid media campaigns from whatever platform they're on (Google, Facebook, Twitter, etc.) into Monetate, thereby giving marketers a clear view in a single interface. This ability helps marketers better understand the matching experiences they need to create.
- ✓ **Utilize automated personalization combined with recommendations** by curating a list of products that are relevant for your top customer segments, and then allow machine learning to determine which ones are most relevant to each individual that lands on your homepage.
- ✓ **For returning, logged-in visitors**, you can highlight the status of their order.





1 CUSTOMER SPOTLIGHT: **Homepage**

# Waitrose

Utilizing customer data to deliver targeted promotions.

## CHALLENGE

The UK grocery retailer Waitrose needed to maximize revenue during the key, peak shopping holiday period. Turkey sales are a key item for the retailer, but customer experience is also a focus, so promotions need to be relevant.

## APPROACH

Waitrose fed customer data from their loyalty program into Monetate. This allowed them to only target visitors who bought a turkey last year but had not done so again this year.

They then tested two different variations in messaging.

**+20%**

Uplift in  
Conversion

A

Don't forget to order your Christmas turkey by **15 December** to collect in-store! ▶

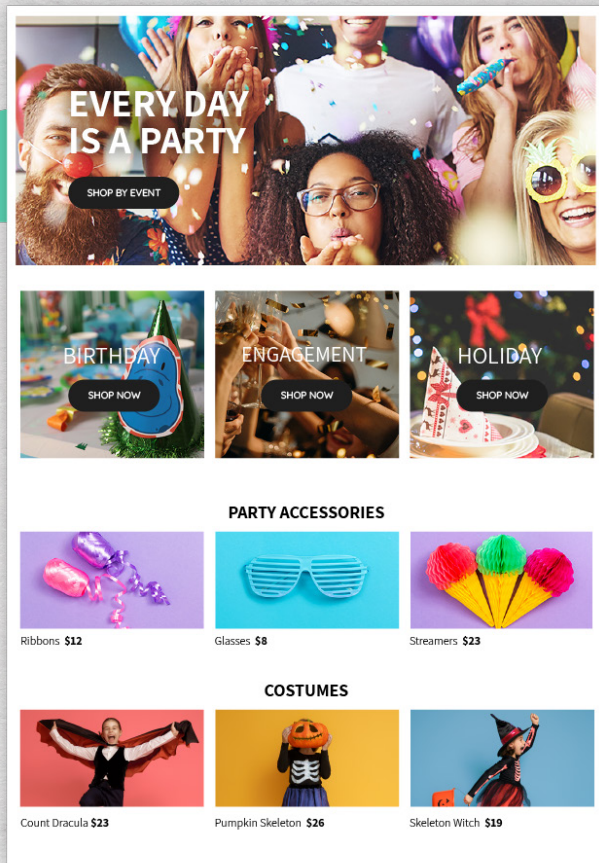
B

Order your Christmas turkey by **15 December** and we'll send you a £5 voucher! ▶





## The Digital Customer Journey: Category Page/Product Listing Page (PLP)



The category page or product listing page (PLP) is where your visitors can refine their search. An effective category page facilitates a shoppers' deeper journey into your site and along the conversion funnel.

At this stage, your visitor has indicated an interest in a particular group of products. You need to quickly engage visitors by helping them to find the product that matches their interests. From here, you want to get them to click on to the product page or add an item straight to their basket.





## Our Favorite Strategies for Improving the Category Page

✔ **Use a product or gift finder** (placed in the header, or in a side panel) to reduce friction and help visitors find what they're looking for. Remember, keep the quiz to 5 questions or less for the best customer experience.

---

✔ **Social proof and badging** are other powerful tools for helping visitors pick out the best product for them, or for you to merchandise the items you want to prioritize (High profit margin, or high stock levels, etc.)

---

✔ **Add an “Add Straight to Cart” option** on each product in the grid.

---

✔ **Deploy personalized category pages** to tailor the entire list of products displayed on the category page when a visitor uses your on-site search.

✔ **Use recommendations** to display the most relevant products in the selected category for each individual shopper:

*Use all items on the page as context.*

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*Merchandising rules should restrict recommendations to the same category.*

---

*Allow recently viewed items from the same category to be displayed.*

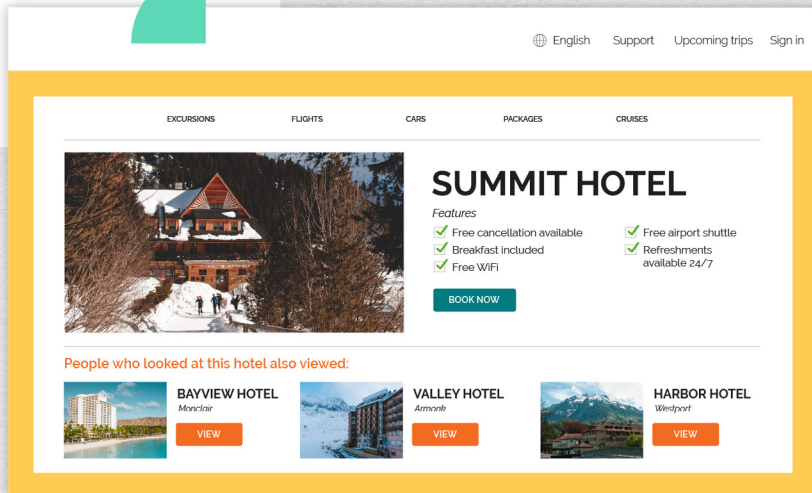
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*Use **Popular Products** to highlight top trending products for the category.*





## The Digital Customer Journey: Product Detail Page (PDP)



The product detail page (PDP) is a key stage in your visitors' purchase experience. Either your customers have come here from the homepage or category page - meaning they are intentionally moving down your sales funnel - or they have come directly from external search - demonstrating a strong intention to buy or find out more about the product.

At the product page stage, your personalization should be aimed at allowing visitors to make an informed and confident purchasing decision.





## Our Favorite Strategies for Improving the Product Detail Page

- ✓ Use social proof to display how popular the item is to reassure the customer that they are buying the best product for their needs.

---

- ✓ Use automated personalization to reorder the layout to suit different audiences. For example, new visitors will be more engaged by reviews closer to the top, rather than new product recommendations.

---

- ✓ The product page isn't about cross-selling. Recommendation rules should focus the customer on the purchase in hand or a similar alternative:

*Use only the **current product** as context.*

*Use dynamic values and recommendation filters to **display similar products** to the one currently being viewed.*

- ✓ The typical goal of the product page is to get the visitor to **convert to shopping cart**. Aside from conversion, you can also use your product page to:

*Upsell*

*Complete the Look*

*Add to Wish List*

*Encourage Product Reviews*

### DYNAMIC VALUES

You can use dynamic values in combination with recommendation filters to ensure only products with similar attributes are displayed. The value is dynamic because it can change from product to product. So, when you're setting up recommendations, you can set the dynamic value to 'type of product' (running shoes, winter jackets, etc.) What this 'type of product' is will be different from one item to the next.

Dynamic values help you to display only relevant recommendations to the visitor.

To take another example, if you wanted to broaden out the types of products you recommended at this stage but still wanted to make sure they're relevant, you could set the dynamic value and recommendation filter to display items that have the same gender attribute as the product currently being viewed.

This flexibility allows you to provide more deeply personalized experiences for each customer.





### 3 CUSTOMER SPOTLIGHT: **Product Listing Page**



**Reebok uses Monetate Automated Personalization to reorder dynamic product pages for each visitor.**

**+12%**

**Add-to-Cart Rates**



#### **CHALLENGE**

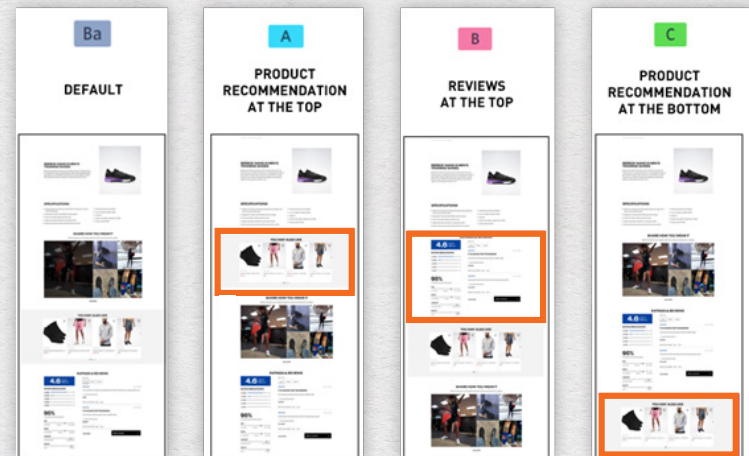
Reebok has lots of customers, each with differing intent. To try and cater to everyone, product pages were packed with brand and experience-led content, but there was too much for anything to stand out.

#### **APPROACH**

Transformed cluttered PDPs into dynamic pages tailored to each visitor.

Used Monetate Automated Personalization Experiences to reorder the page, prioritizing reviews over recommendations, content, etc.

Delivered automated personalization at scale, on key pages, and witnessed serious results from doing so.







## The Digital Customer Journey: Cart/Basket Page

**Checkout**

✓ **Tickets**

 **Skate Showcase at Dome Arena**  
05/07/2024 at 7pm  
Seats 44A, 44B, 44C

✓ **Parking**

 **West Wing Parking**  
.11 miles from venue

✓ **Payment**

John McKinney  
501 Queens Drive, Brockport  
XXX-XXXXX-XXXXX5678 02/25

Event Tickets Qty: 2 \$78  
Parking Add-On \$12  
**Total \$90**

**COMPLETE PURCHASE**

The cart or basket page is the final page a shopper sees before checkout. This page provides the best opportunity to boost incremental revenue through cross-selling. That being said, the primary objective here is to convert – to get the visitor to complete their purchase.





## Our Favorite Strategies for Improving the Cart/Basket Page

✔ **Use Dynamic Testing** to optimize the layout, language, and more, during this crucial stage in the journey, while minimizing risk (Dynamic Testing automatically allocates more traffic to the best performing variant.)

---

✔ **Highlight value propositions** like free shipping (If the visitor has to meet a certain threshold to qualify, only display this message if they have met or exceeded that threshold.)

---

✔ **Add a count-down timer** showing how much time the visitor has left to qualify for next day shipping. Set a rule to only display the timer if it's under a certain time frame.

---

✔ **Recommendations strategies should focus on cross-selling and impulse purchases:**

*Display complimentary products, giving the shopper an opportunity to consider other items at the checkout stage.*

---

*Avoid displaying competing, similar items that may distract the visitor from checking out.*

*Personalize suggestions such as complete the look, ensemble, same collection, etc., to offer a tailored selection of recommendations likely to increase value per customer.*

---

*Displaying popular, lower-priced items related to the current purchase allows you to take advantage of impulse buy opportunities at the cart page.*

---

*Use all products in the cart as context for your recommendations*

---

✔ **Specific recommendation algorithm suggestions for the cart page:**

**Also purchased:** *When a customer is on the cart page, show them other products frequently bought alongside the one they're about to purchase.*

---

**Recently Viewed:** *When a customer is on the cart page, showing what they've browsed may remind them of other products they intended to purchase. Give them easy access to their browsing history with the 'Recently Viewed' recommendation algorithm.*





#### 4 CUSTOMER SPOTLIGHT: **Cart/Basket Page**



**The Landmark Group added product recommendations to the cart page for increased AOV and RPS.**

#### CHALLENGE

Multinational retail and hospitality conglomerate The Landmark Group had a goal of increasing average order value (AOV). They wanted to see if adding product recommendations to the cart page based on in session and past behavior

#### APPROACH

Added product recommendations to the cart page based on in session and past behavior.

Not knowing which messaging or algorithm would perform the best, Landmark deployed the different variants as a Dynamic Test. This enabled machine learning to amend the traffic allocation based on the performance of each variant.

This approach allowed Landmark to learn and maximize performance. They discovered that the “Viewed-Also-Viewed” algorithm worked the best.

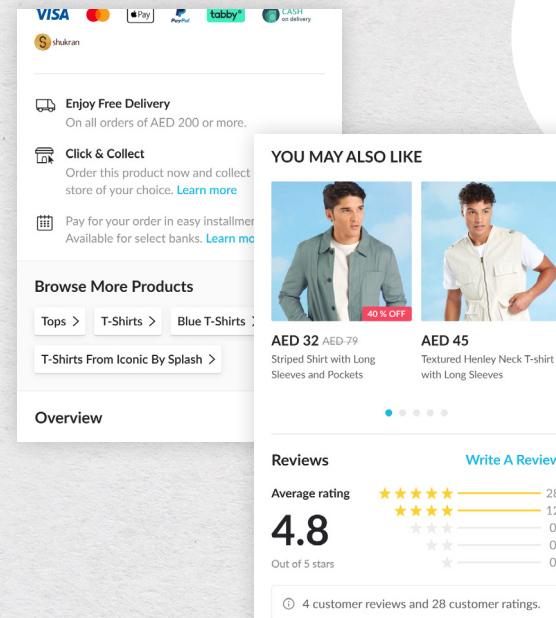
**+13%**

Increase  
in AOV



**+16.6%**

Increase  
in RPS





## Building the Digital Customer Journey

# Automated Personalization at Scale

In this playbook, we covered a lot of material that we hope will be valuable for you and your team as you continue to build and shape the digital customer journey.

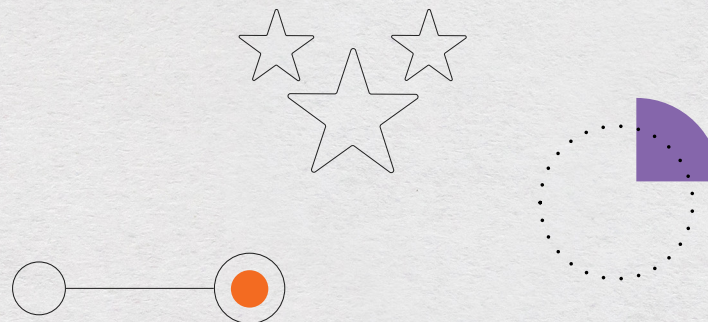
We believe that our discoveries and wins over the past two decades highlighted in these pages are the fuel you need to take your personalization to new heights.

There are so many different tools, platforms, and software solutions on the market that claim to offer enhanced personalization solutions to brands. And some of them are very good at what they do.

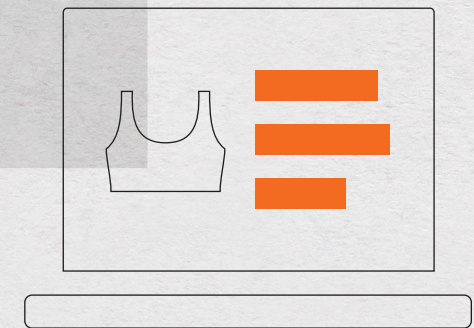
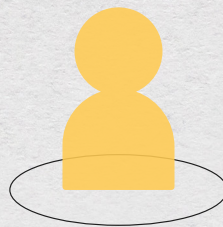
But Monetate stands apart as the only personalization platform that offers an integrated, all-in-one solution for analytics, testing, and customizable personalization actions to create a complete customer journey.

Paired with the legacy product recommendations capabilities from Certona, you have the toolkit you need to build and scale automated personalization.

For more best practices, or for advice on specific use cases tailored to your unique goals, please [contact the Monetate team](#).







Monetate helps organizations make personalization a reality.

Our personalization suite is built from the best components of Monetate and Certona, pioneers and leaders in enterprise A/B/n testing and AI-driven individualization and offered through a consolidated, user-friendly interface. Our comprehensive offering enables tailored experiences across digital channels through a diverse product range, including A/B tests, AI-driven testing, audience segmentation, product recommendations, social proof, 1-to-1 personalization, and more. We help clients get the most out of our solutions through a consultative model that offers success plans made by our internal experts that deliver on short-term and long-term ROI.

Monetate has been the choice of customer-centric businesses, influencing over \$230 billion in revenue annually for companies like Reebok, Office Depot, and Lufthansa Group.

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

