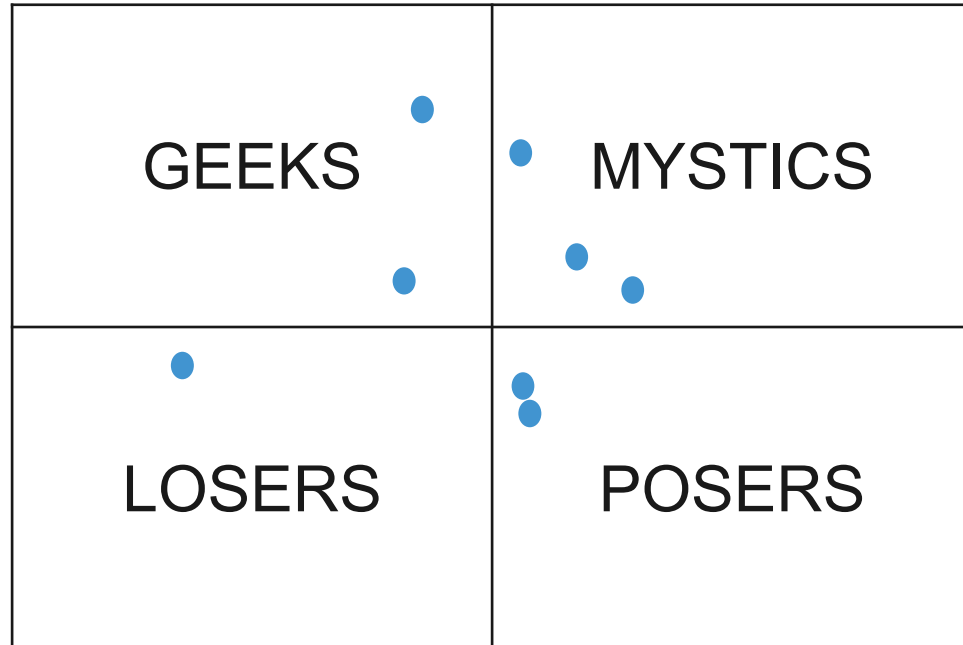


Where should personalization reside in your new stack?

April, 2022

A Different Kind of Analyst Firm...



“the mystical quadrant”

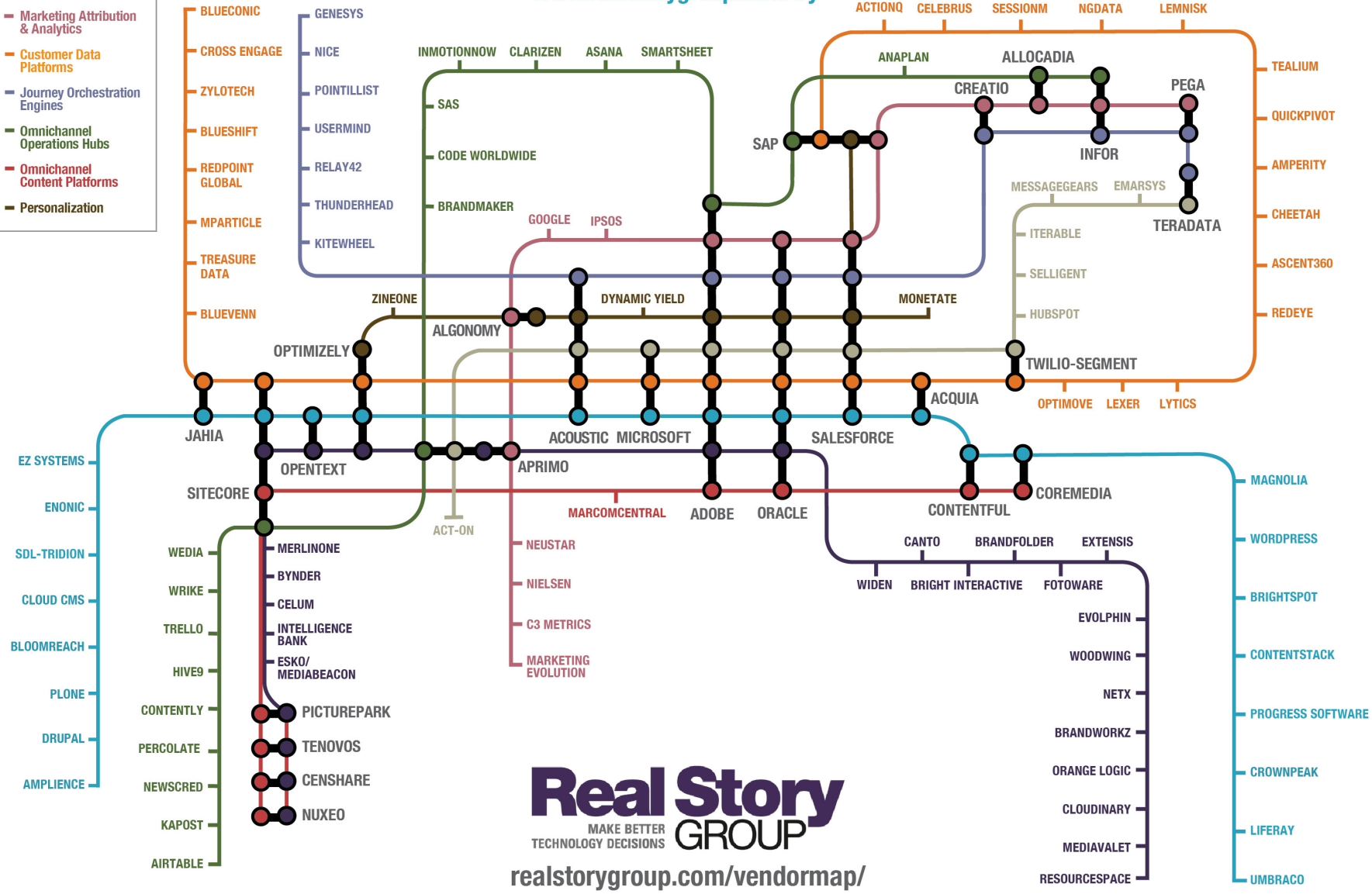
INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

MARTECH STACK VENDOR MAP

Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

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- KEY**
- Web Content & Experience Management
 - Digital Asset Management
 - Marketing Automation & Email Service Providers
 - Marketing Attribution & Analytics
 - Customer Data Platforms
 - Journey Orchestration Engines
 - Omnichannel Operations Hubs
 - Omnichannel Content Platforms
 - Personalization



Real Story
 MAKE BETTER TECHNOLOGY DECISIONS
GROUP

realstorygroup.com/vendormap/



Setting the Scene: Omnichannel Personalization Is Hard

#PersonalizationFail

Compare with similar items

Past purchased



Hotsun Multi-Purpose Flame Gas

★★★★☆ 22

2 Pisces

₹249.00

✓prime FREE

Delivery

Add



Exotes California Almonds (badam)

★★★★☆ 13

-

₹850.00

(₹ 0.85/Gram)

✓prime FREE

Delivery



Add

Andreas Hagemann
@hagmnn

Can't wait to surprise my wife with an organic red bell pepper!

Whole Foods Market shopper • Just now

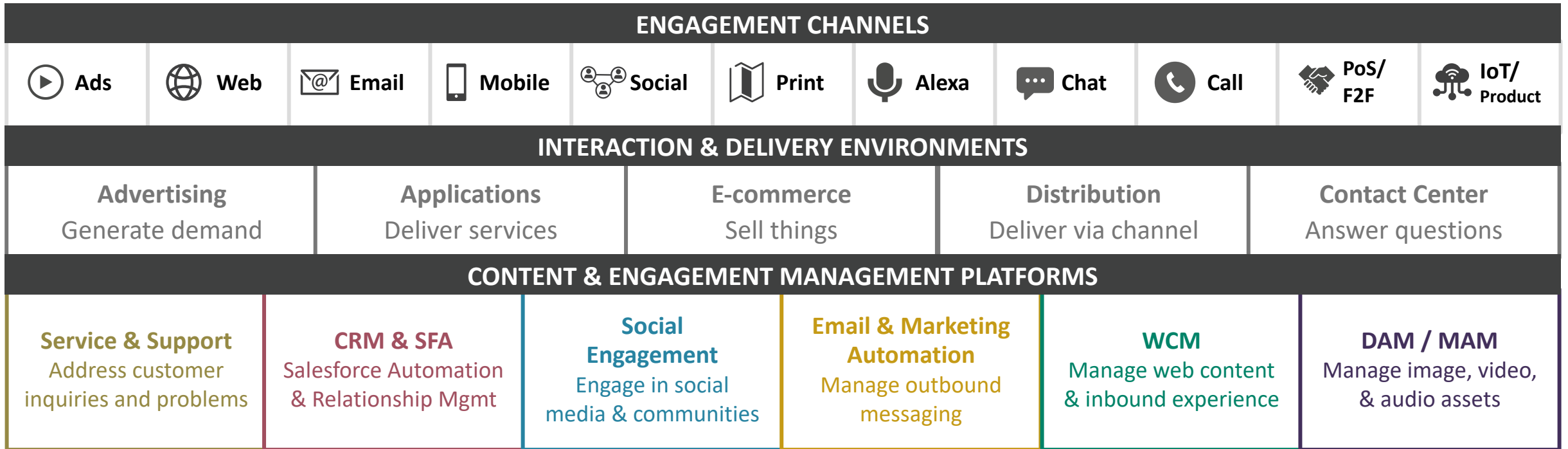
One of the items in your Whole Foods Market order is out of stock, please review substitution option(s).

 → 

OUT OF STOCK Rose 12 Stems 40Cm Whole Trade Guarantee \$12.99	SUBSTITUTION Pepper Bell Red Whole Trade Guarantee Organic, 1 Each \$3.99
---	--

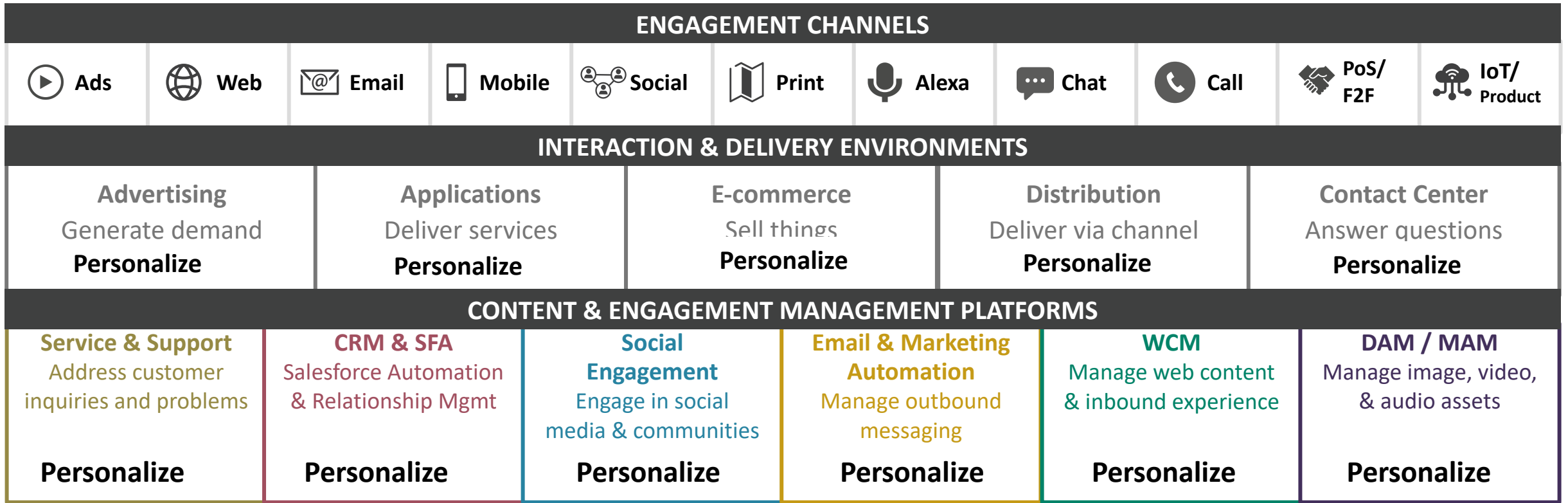
Decline Accept

Traditional Stacks



Q: Where Does Personalization Live?

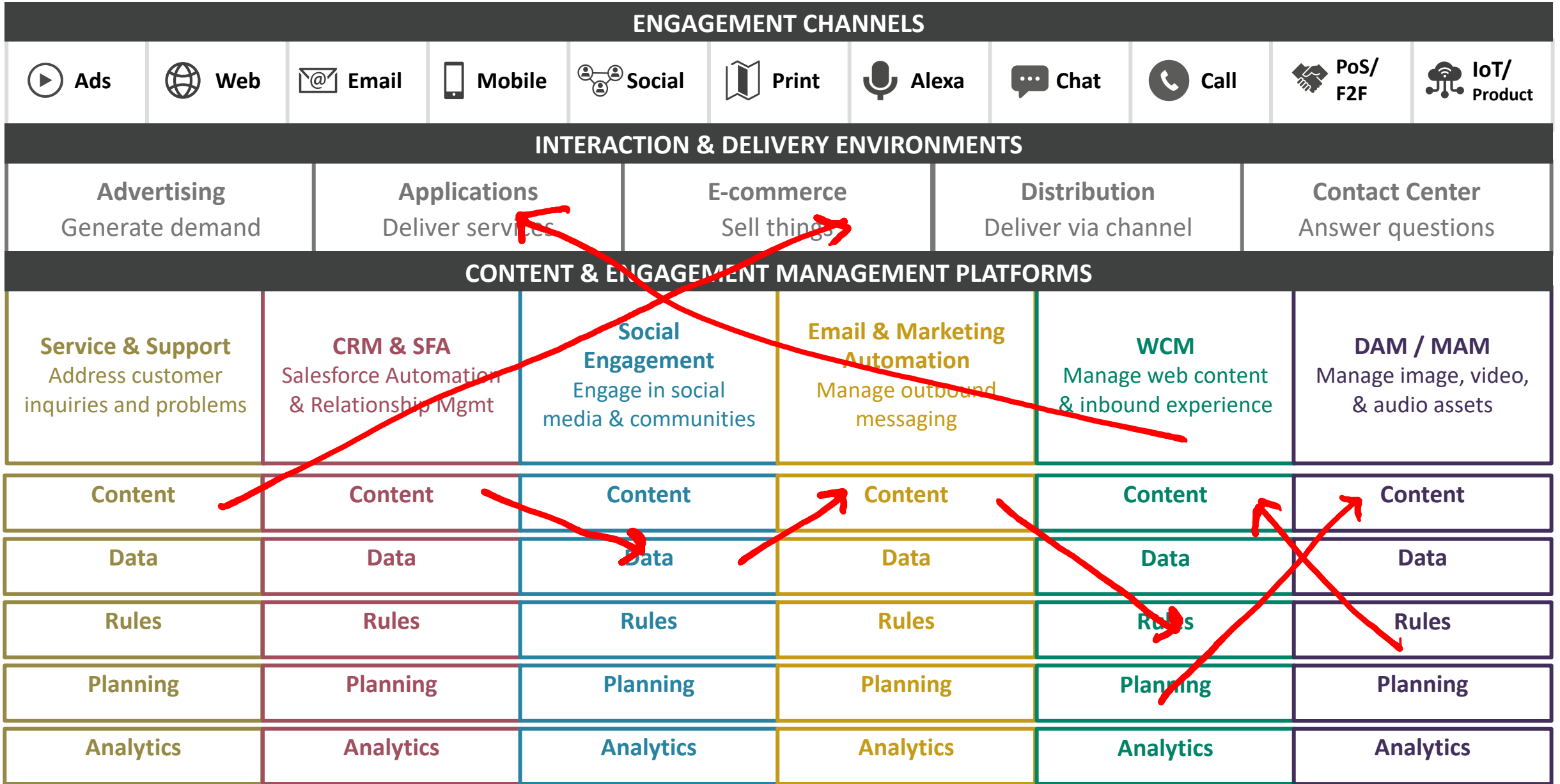
Traditional Stacks



Q: Where Does Personalization Live Today?

A: Everywhere

Silos Kill Personalization

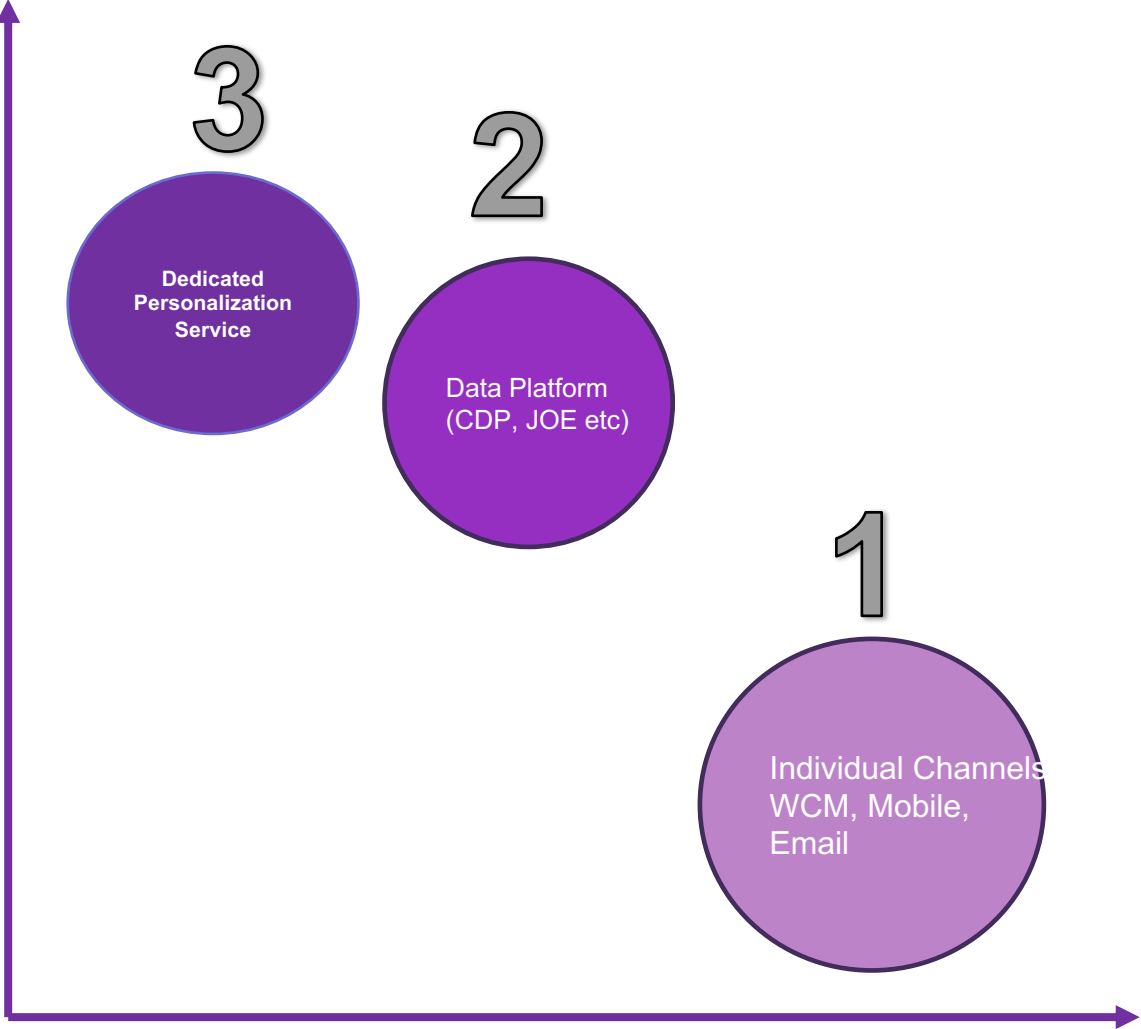




2

Different Approaches

Different Ways To Seat Personalization in Your Stack



1) Part of Channel

Campaigns Automate Audience Brand Reports

Overview Manage contacts Add contacts Signup forms Settings Conversations Surveys

Toggle Columns Exp

Create a segment

Contacts match **all** of the following conditions:

Location is within 25 miles of

Validate Location [about geolocation data](#)

AND

Language is English

+ Add

Preview Segment [Cancel](#)

Part of website, mobile app or marketing automation system.

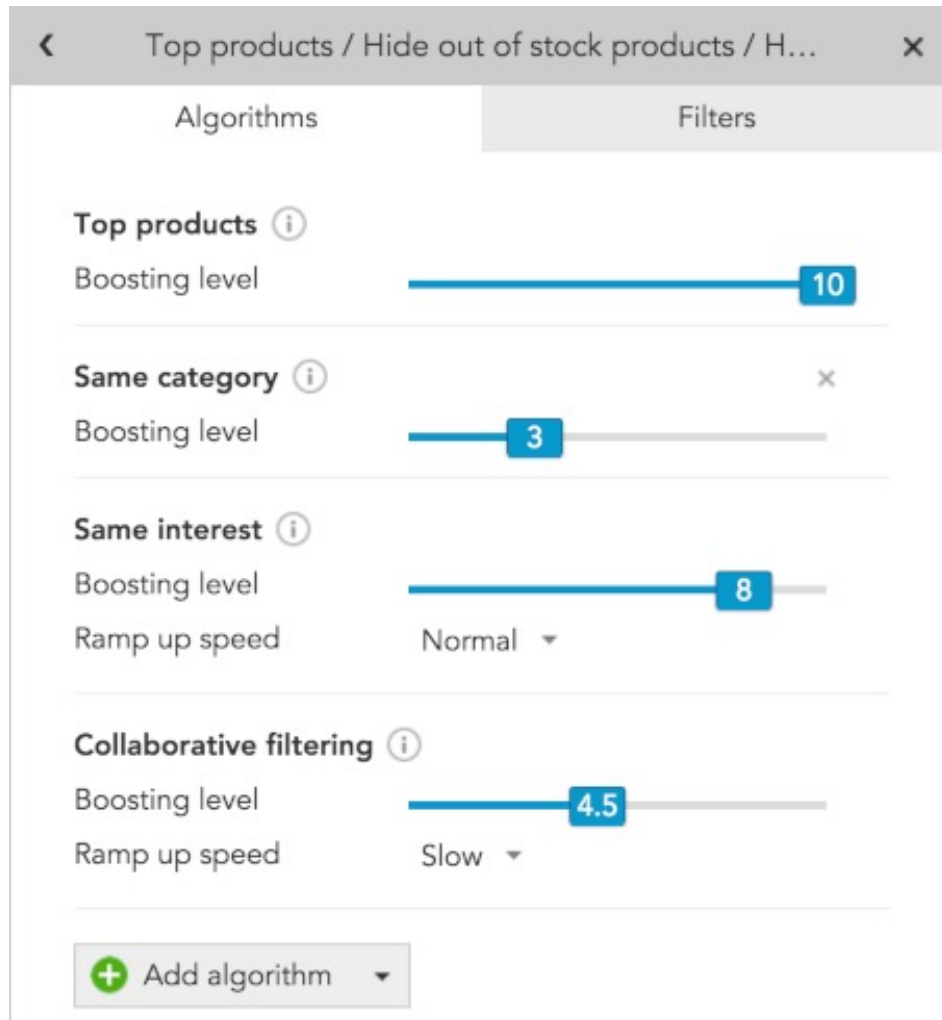
Tightest integration with functionality.

Easier in terms of initial implementation.

Requires channel- or platform-specific rules as well as decision logic

Need different Personalization systems for different end-user channels

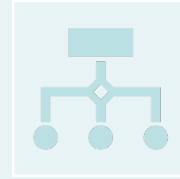
2) Part of Data Platform



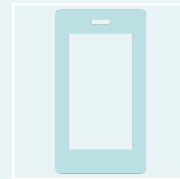
The screenshot shows a user interface for configuring filters. The title bar reads 'Top products / Hide out of stock products / H...'. There are two tabs: 'Algorithms' and 'Filters'. Under the 'Filters' tab, there are four filter sections, each with a boosting level slider and a ramp up speed dropdown:

- Top products** (info icon): Boosting level slider set to 10.
- Same category** (info icon, close icon): Boosting level slider set to 3.
- Same interest** (info icon): Boosting level slider set to 8, Ramp up speed dropdown set to 'Normal'.
- Collaborative filtering** (info icon): Boosting level slider set to 4.5, Ramp up speed dropdown set to 'Slow'.

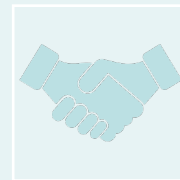
At the bottom, there is a '+ Add algorithm' button.



Part of an omni-channel data platform, such as Customer Data Platform (CDP) or a Journey Orchestration System (JOE)



Abstract functionality away from channels and brings it closer to customer data



Weaker integration with channels could lead to issues

3) Dedicated Personalization Engine

Name	Type	Status	Modified	Results
Feed Personalization Campaign	Personalization Campaign	Running	Aug 28, 2019	Results
LinkedIn Products Promo Test	A/B Test	Running	Aug 28, 2019	Results
Mobile Sign Up Flow Test	A/B Test	Running	Aug 28, 2019	Results
'Todays News' Personalization Campaign	Personalization Campaign	Running	Aug 28, 2019	Results
'Interests' Modal Re-design	A/B Test	Not Started	Aug 28, 2019	Results
Profile Page Layout Test	A/B Test	Not Started	Aug 28, 2019	Results
Personalization Campaign (Job Page)	Personalization Campaign	Not Started	Aug 28, 2019	Results
Jobs Extension Test	A/B Test	Running	Aug 28, 2019	Results
My Network re-design	A/B Test	Not Started	Aug 28, 2019	Results

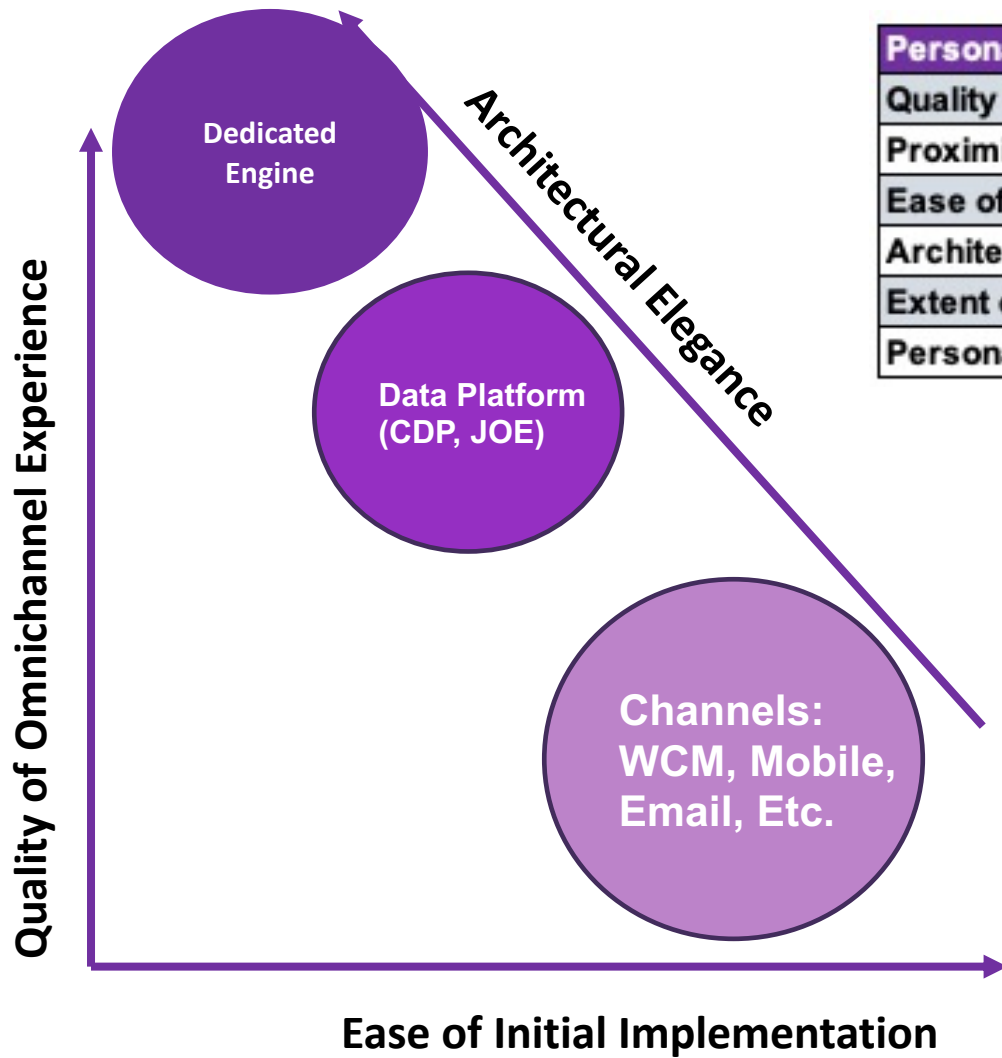
Cleaner architecture with “Separation of concerns”

Provides more exhaustive capabilities

Light in terms of integrations with channels

Will need some way to have access to unified, cleaned customer profiles.

Summary - Approaches For Personalization



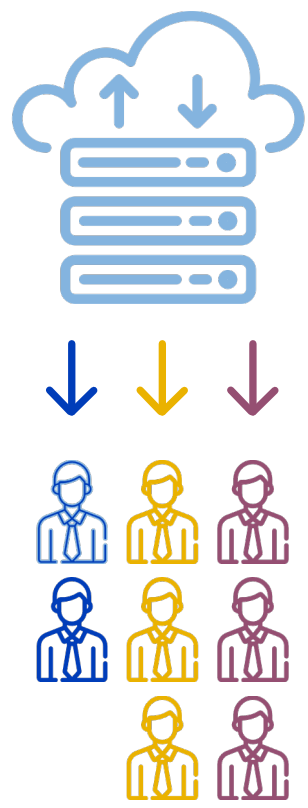
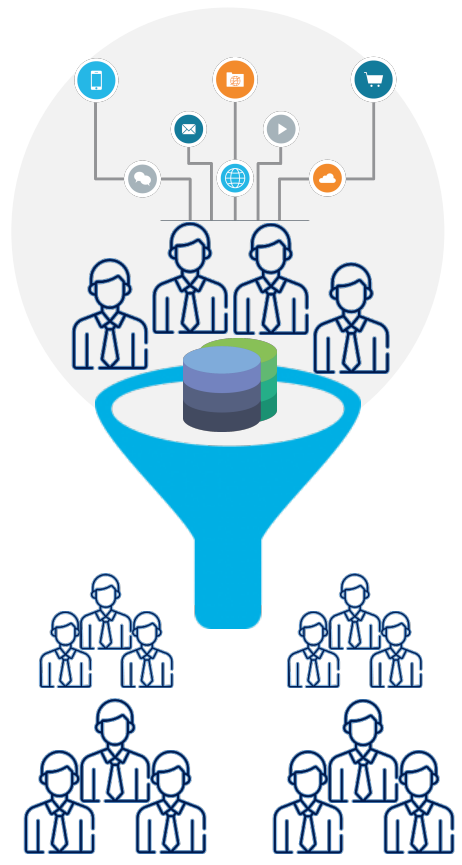
Personalization Parameter	Dedicated Layer	Part of Data Platform	Part of Channels
Quality of Omnichannel Experience	●	◐	◑
Proximity to End Users	◑	◐	●
Ease of Initial Implementation	◑	◐	●
Architectural Elegance	●	◐	◑
Extent of Capabilities	●	◐	◑
Personalization at Scale	●	◐	◑



3

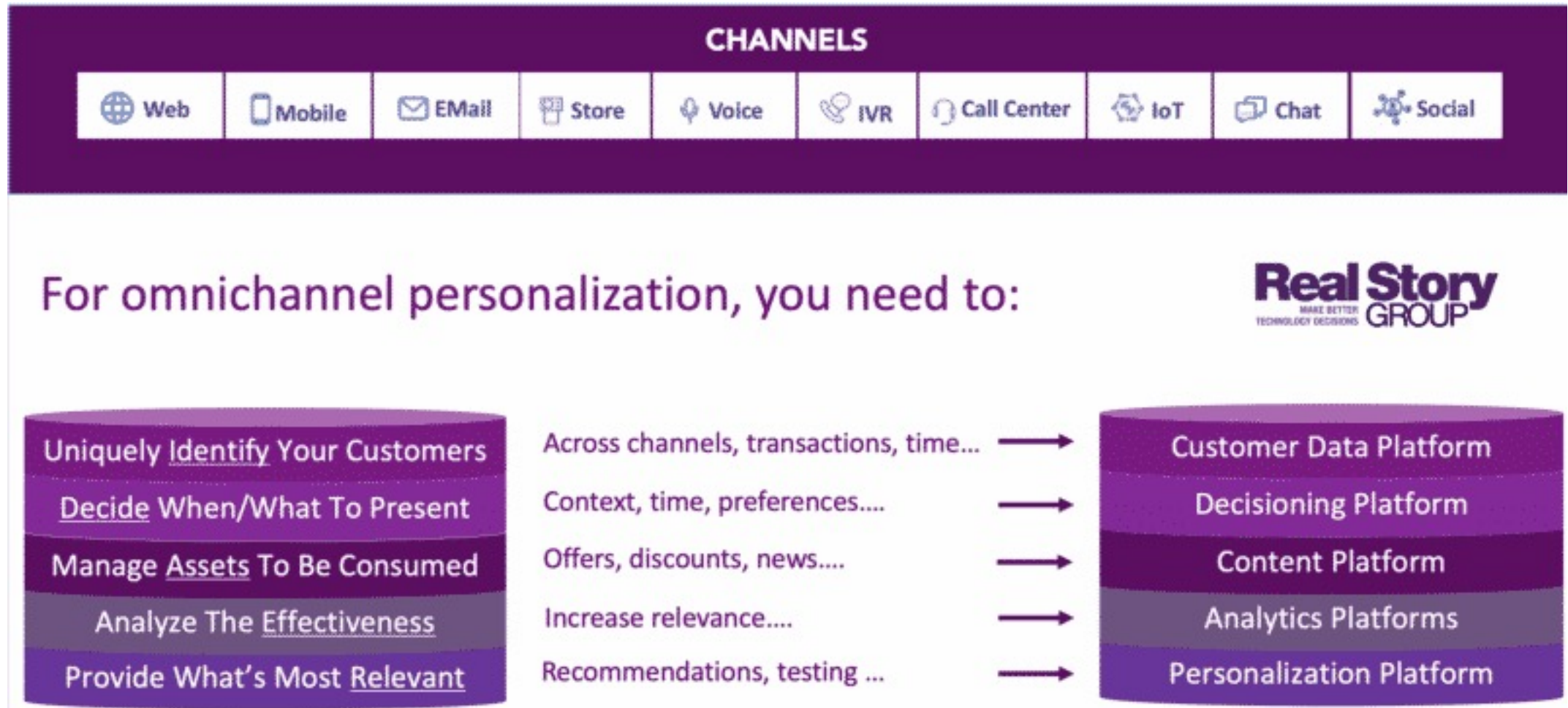
Key Components for Personalization
(Hint: Requires Multiple Services in Your Stack)

Personalization Prerequisites: Unified customer data as table stakes

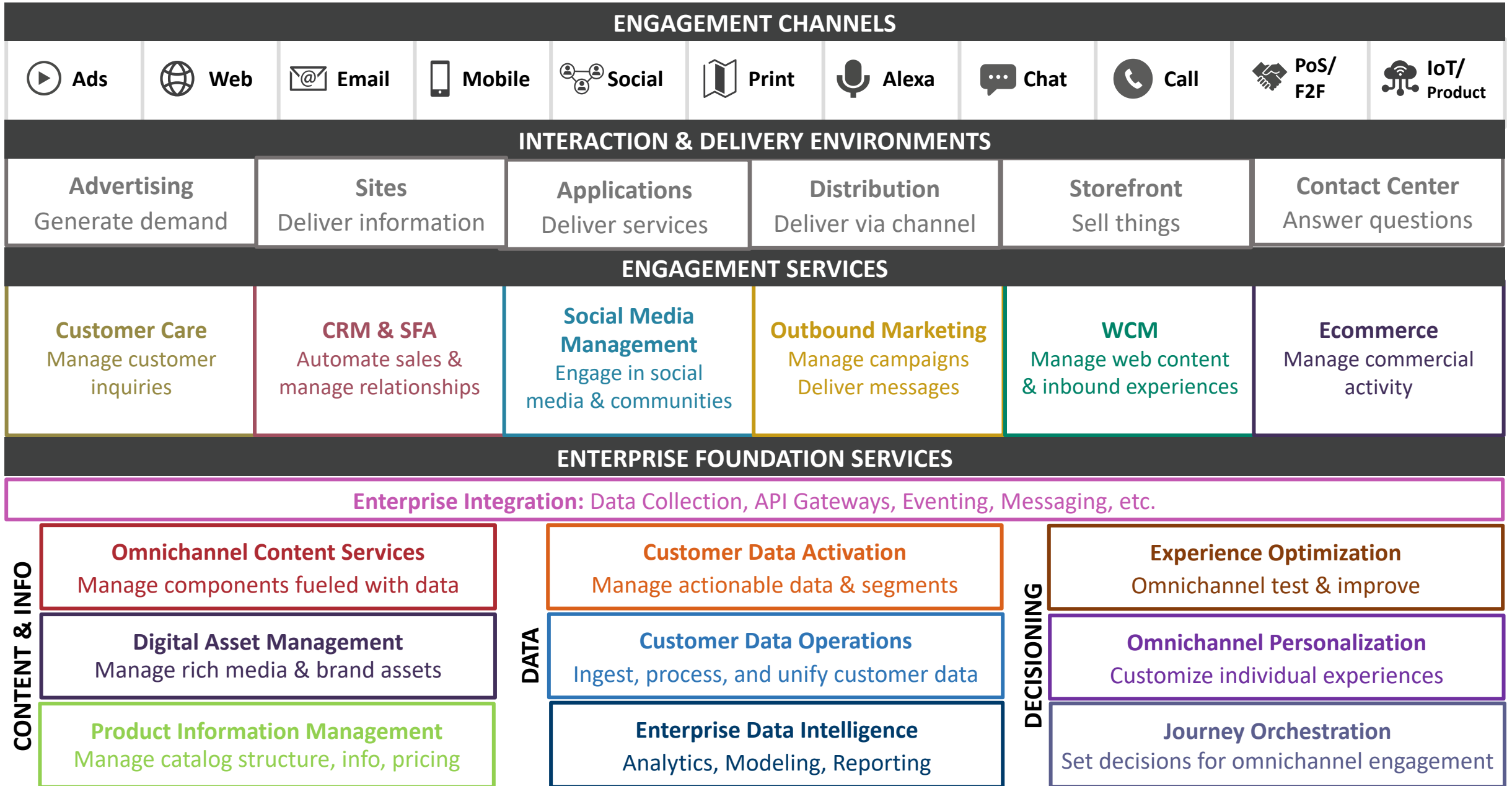


For successful personalization, you will need other enablers and indeed some prerequisites. Of the latter, unified customer data should become your first priority. And this means first grappling with the full lifecycle of customer data, which has at least five phases

Mapping personalization prerequisites to your stack



RSG MarTech Services Reference Model: Composable Stack



Personalization Logo Landscape

MarTech Suite Vendors

acoustic



ORACLE



Independent Players



ALGONOMY



Niche Personalization Vendors



Intellimize



DEMANDBASE



Niche Testing Players



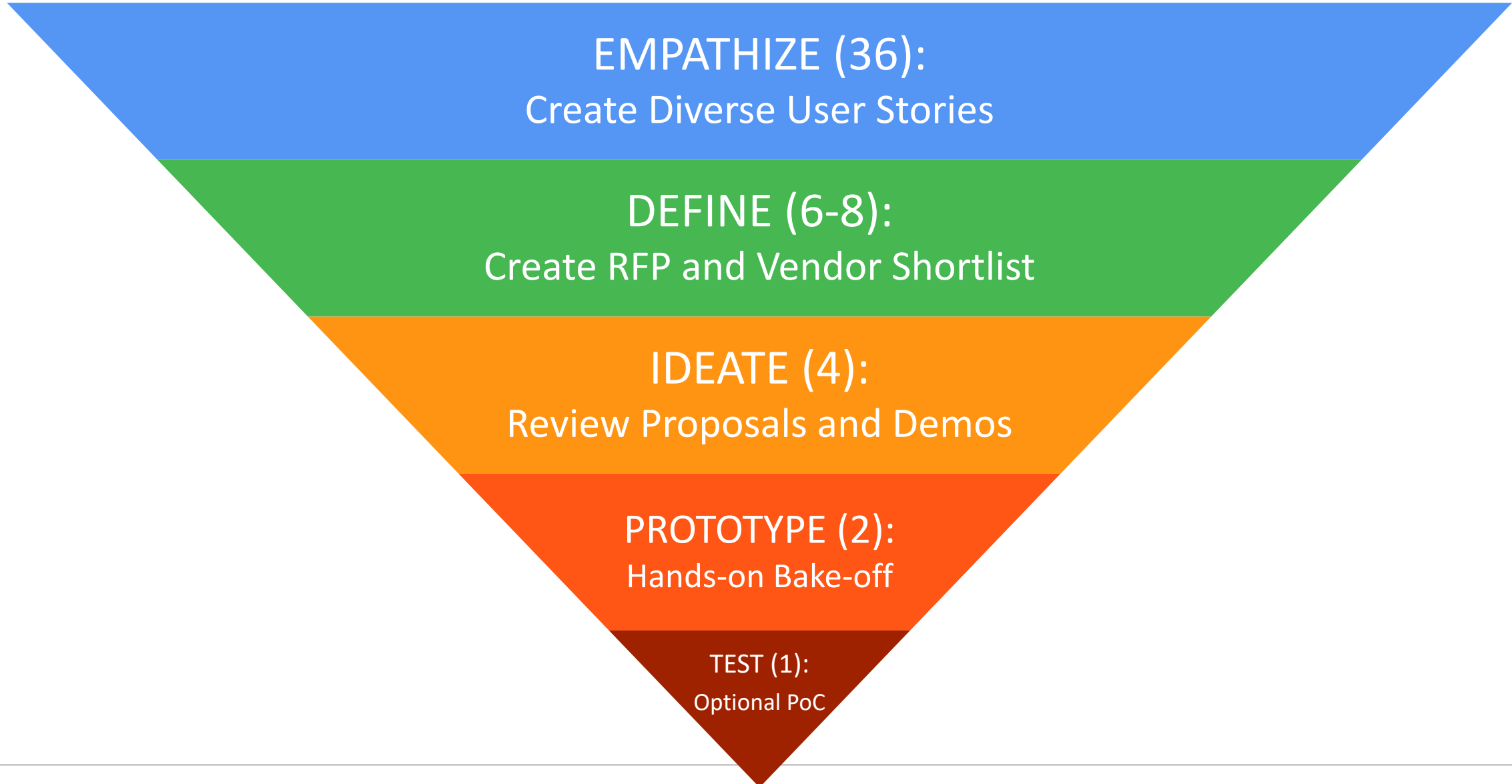
SITESPECT

How to Select

3



How to Filter...

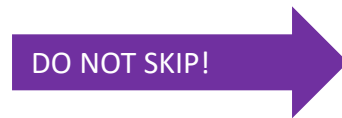
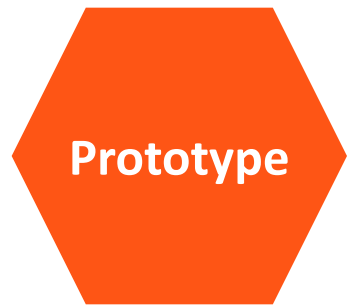


Personalization Business Use Cases

Personalization					
Test and Optimize REMOVE FROM LIST ADDITIONAL VENDORS					
Web Personalization REMOVE FROM LIST ADDITIONAL VENDORS					
Outbound Personalization REMOVE FROM LIST ADDITIONAL VENDORS					
Ecommerce Recommendations REMOVE FROM LIST ADDITIONAL VENDORS					

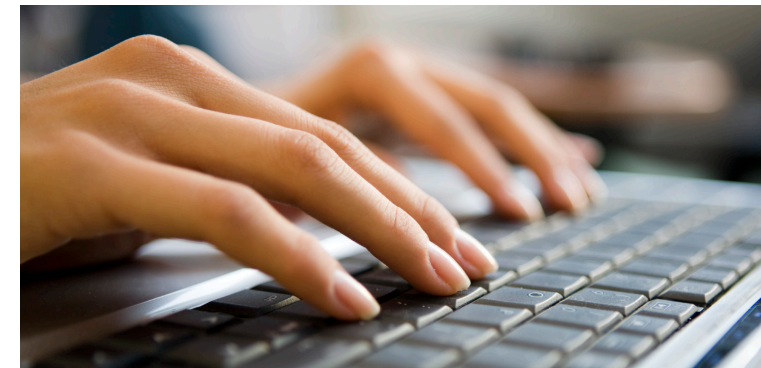
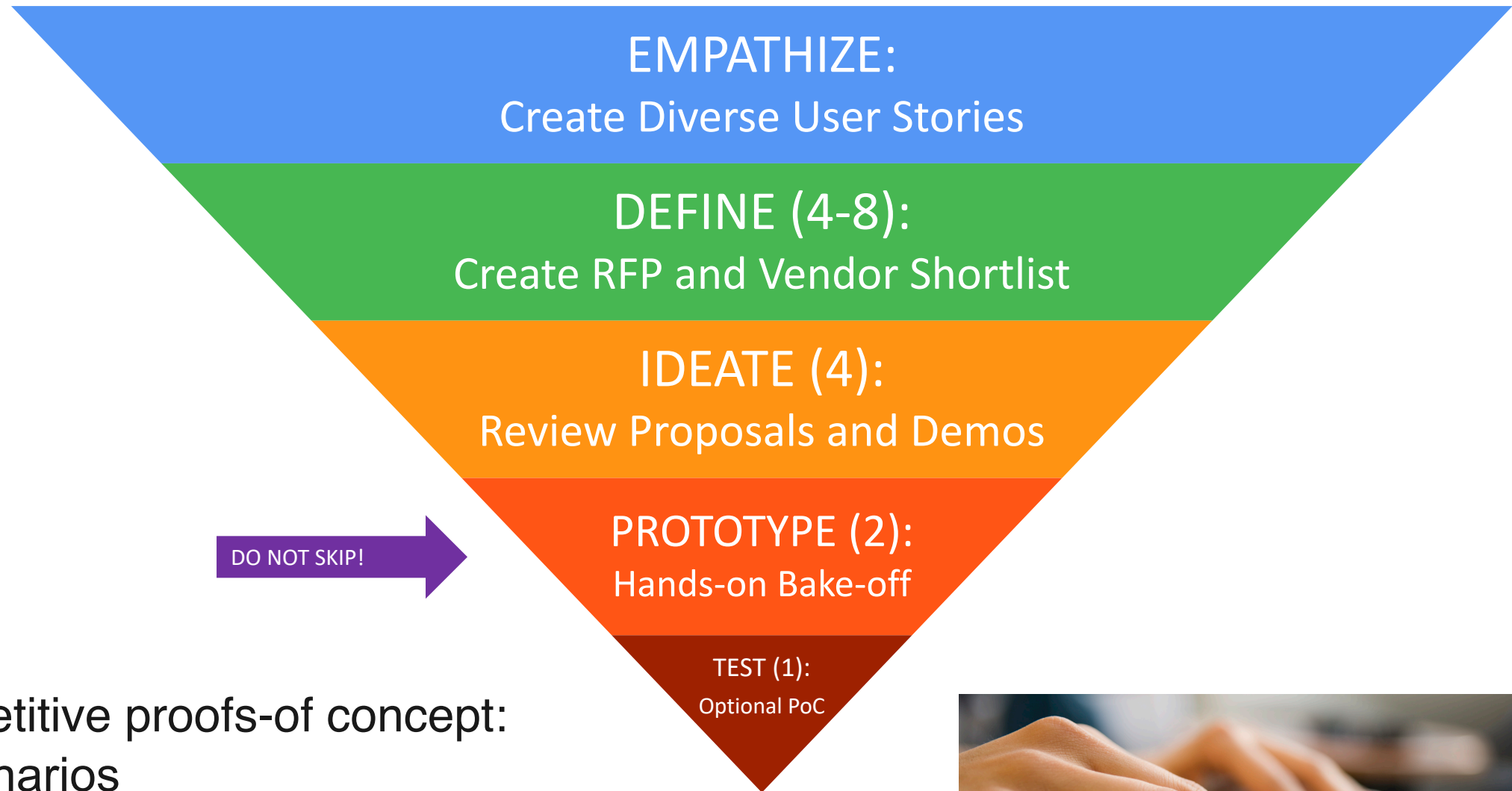
Key Considerations:

- Not all Personalization vendors support all use cases, or support them evenly
- Best practice to prioritize business importance among them



Conduct competitive proofs-of concept:

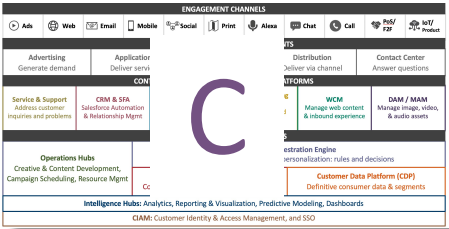
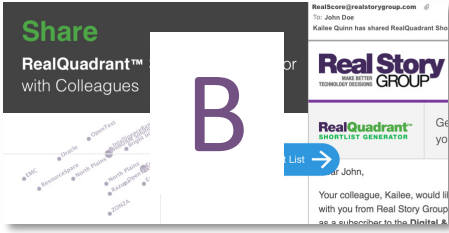
- Real scenarios
- Real (dummy) data
- Real people
- Real environment



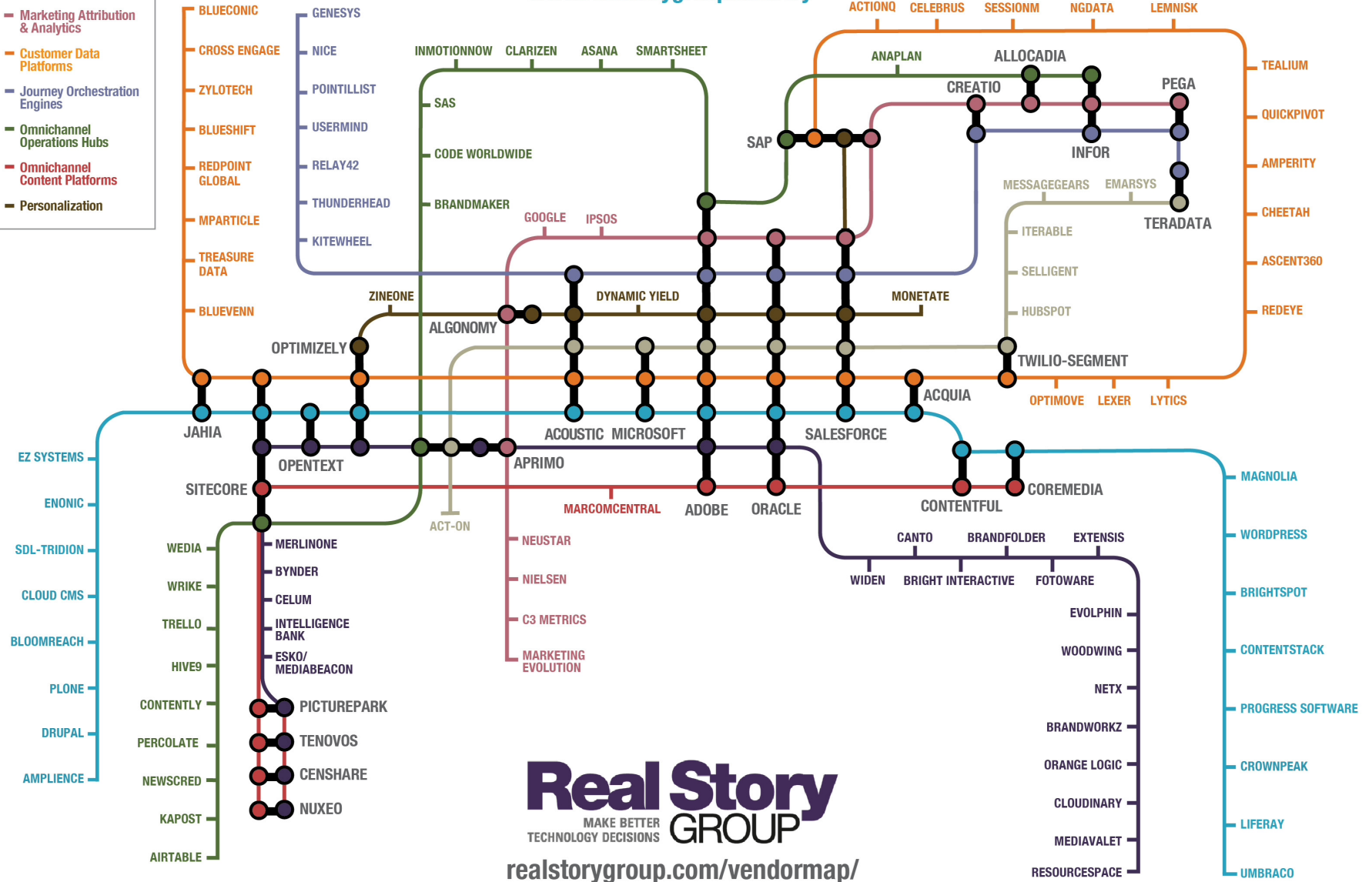
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 - Journey Orchestration Engines
 - Omnichannel Operations Hubs
 - Omnichannel Content Platforms
 - Personalization



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Campaign & Lead
Management Technology

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Customer Relationship
Management