Where should personalization reside in your new stack?

April, 2022
A Different Kind of Analyst Firm...

“the mystical quadrant”
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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realstorygroup.com/vendormap/
Setting the Scene: Omnichannel Personalization Is Hard
#PersonalizationFail

Compare with similar items

Past purchased

Hotsun Multi-Purpose Flame Gas

Exotes California Almonds (badam)

2 Pisces

₹249.00

₹850.00
(₹ 0.85/Gram)

✓prime FREE Delivery

✓prime FREE Delivery

Add

Add

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

## ENGAGEMENT CHANNELS

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## INTERACTION & DELIVERY ENVIRONMENTS

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## CONTENT & ENGAGEMENT MANAGEMENT PLATFORMS

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**Q: Where Does Personalization Live?**
### Traditional Stacks

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**Q:** Where Does Personalization Live Today?

**A:** Everywhere
# Silos Kill Personalization

## Engagement Channels
- **Advertising**
  - Generate demand
- **Applications**
  - Deliver services
- **E-commerce**
  - Sell things
- **Distribution**
  - Deliver via channel
- **Contact Center**
  - Answer questions

## Interaction & Delivery Environments
- **Service & Support**
  - Address customer inquiries and problems
- **CRM & SFA**
  - Salesforce Automation & Relationship Mgmt
- **Social Engagement**
  - Engage in social media & communities
- **Email & Marketing Automation**
  - Manage outbound messaging
- **WCM**
  - Manage web content & inbound experience
- **DAM / MAM**
  - Manage image, video, & audio assets

## Content & Engagement Management Platforms

### Content
- **Service & Support**
- **CRM & SFA**
- **Social Engagement**
- **Email & Marketing Automation**
- **WCM**
- **DAM / MAM**

### Data
- **Service & Support**
- **CRM & SFA**
- **Social Engagement**
- **Email & Marketing Automation**
- **WCM**
- **DAM / MAM**

### Rules
- **Service & Support**
- **CRM & SFA**
- **Social Engagement**
- **Email & Marketing Automation**
- **WCM**
- **DAM / MAM**

### Planning
- **Service & Support**
- **CRM & SFA**
- **Social Engagement**
- **Email & Marketing Automation**
- **WCM**
- **DAM / MAM**

### Analytics
- **Service & Support**
- **CRM & SFA**
- **Social Engagement**
- **Email & Marketing Automation**
- **WCM**
- **DAM / MAM**
Different Approaches
Different Ways To Seat Personalization in Your Stack

1. Individual Channels: WCM, Mobile, Email
2. Data Platform: (CDP, JOE etc)
3. Dedicated Personalization Service
1) Part of Channel

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

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

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

<table>
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<th>Personalization Parameter</th>
<th>Dedicated Layer</th>
<th>Part of Data Platform</th>
<th>Part of Channels</th>
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<td>☀</td>
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<td>☀</td>
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<tr>
<td>Proximity to End Users</td>
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</tr>
<tr>
<td>Extent of Capabilities</td>
<td>☦</td>
<td></td>
<td>☦</td>
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<tr>
<td>Personalization at Scale</td>
<td>☦</td>
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Dedicated Engine

Data Platform (CDP, JOE)

Architectural Elegance

Channels: WCM, Mobile, Email, Etc.

Ease of Initial Implementation
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

For omnichannel personalization, you need to:

- Uniquely Identify Your Customers
- Decide When/What To Present
- Manage Assets To Be Consumed
- Analyze The Effectiveness
- Provide What’s Most Relevant

Across channels, transactions, time...
Context, time, preferences....
Offers, discounts, news....
Increase relevance....
Recommendations, testing ...

Customer Data Platform
Decisioning Platform
Content Platform
Analytics Platforms
Personalization Platform
# RSG MarTech Services Reference Model: Composable Stack

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## Engagement Services

- **Customer Care**
  - Manage customer inquiries

- **CRM & SFA**
  - Automate sales & manage relationships

- **Social Media Management**
  - Engage in social media & communities

- **Outbound Marketing**
  - Manage campaigns
  - Deliver messages

- **WCM**
  - Manage web content & inbound experiences

- **Ecommerce**
  - Manage commercial activity

## Enterprise Foundation Services

- **Enterprise Integration**: Data Collection, API Gateways, Eventing, Messaging, etc.

## Content & Info

- **Omnichannel Content Services**
  - Manage components fueled with data

- **Digital Asset Management**
  - Manage rich media & brand assets

- **Product Information Management**
  - Manage catalog structure, info, pricing

## Data

- **Customer Data Activation**
  - Manage actionable data & segments

- **Customer Data Operations**
  - Ingest, process, and unify customer data

- **Enterprise Data Intelligence**
  - Analytics, Modeling, Reporting

## Decisioning

- **Experience Optimization**
  - Omnichannel test & improve

- **Omnichannel Personalization**
  - Customize individual experiences

- **Journey Orchestration**
  - Set decisions for omnichannel engagement
Personalization Logo Landscape

MarTech Suite Vendors
- acoustic
- Adobe
- Salesforce
- Optimizely
- SAP
- KiBo
- Oracle
- Sitecore

Independent Players
- dynamic yield
- AlgōnomY
- ZineOne
- Amplitude

Niche Personalization Vendors
- Breinify
- Intellimize
- Bluecore
- Algòlia
- Uniform
- CustomFit.ai
- SOLUS
- Argoid
- Demandbase
- Ninetailed
- SoloSegment

Niche Testing Players
- VWO
- SiteSpect
How to Select
How to Filter...

**EMPATHIZE (36):**
Create Diverse User Stories

**DEFINE (6-8):**
Create RFP and Vendor Shortlist

**IDEATE (4):**
Review Proposals and Demos

**PROTOTYPE (2):**
Hands-on Bake-off

**TEST (1):**
Optional PoC
### Personalization Business Use Cases

<table>
<thead>
<tr>
<th>Personalization</th>
<th>1 Test and Optimize</th>
<th>2 Web Personalization</th>
<th>3 Outbound Personalization</th>
<th>4 Ecommerce Recommendations</th>
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**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
MARTECH STACK VENDOR MAP

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