

11 STEPS TO EFFECTIVE PERSONALISATION



63% of consumers “expect personalization as a standard of service” according to [a 2019 survey](#) by Harris for Redpoint Global. So how do you personalise your relationship with customers and prospects? The key is to keep communications *relevant*.

- 1** Personalisation isn't just about adding a first name to an email subject line but OK, let's start with that. You might want to be a bit more elaborate like [The Marketing Meetup](#) (I was “Steve, you beautiful soul” in their last email) but, although I quite like it, I'm not 100% sold on the approach yet.
- 2** What have they bought? You've got a transaction history for your customers. You know what they bought and when. You know what they *haven't* bought. Get that information out of your accounts system and into your marketing systems (see Point 10).
- 3** Which emails have they responded to? Group your emails by subject. Maintain a score for every contact on each subject. When they click, their score goes up. When they stop responding, their score goes down.
- 4** Which web pages have they looked at? Group your web pages by subject. When a contact visits a page, their score goes up for that page's subject.
- 5** What questions have they asked through your website's chatbot (if you have one)? Group the pre-packaged questions you offer by subject and adjust a user's score according to what they're asking about.



6 Which functions have they used on your app (if you have one)? Track which functions are being used by contacts. Group the functions by subject. Adjust a user's score according to what they're using.

7 What service calls are they making? Service calls don't just tell you what's relevant to your customers, they highlight satisfaction levels too.

8 Boost the information you hold with selective surveys. We're big fans of one-question surveys that are easy to answer and gradually enrich your database.

9 Personalise your web site's landing pages so contacts see what's relevant to them. It's technically challenging to do (and quite expensive) but it is possible. Accuracy has declined since we started working from home because our domestic IP addresses aren't associated with the businesses we work for.

10 Get the right tech. And people. Personalisation depends on systems talking to each other. These Black Papers aren't about selling but this is, I admit, a bit of a sell. [Zoho One](#) does 1 to 8 for a ridiculously low price.

11 Once you know them, restrict your communications to subjects folks are interested in. Yes, you can occasionally try to cross-sell but focus your efforts on what you know they want.

One final caveat. Make sure you have permission to record the data and make it clear to contacts why you're recording it.

