



MARTECH **PERSONALIZE**

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PERSONALIZE

IN MARTECH



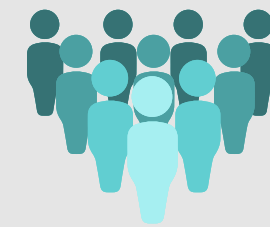
*“AI-powered content production leverages
behavioral, emotional, and contextual data
to intelligently create and deliver personalized content.”*

CAPABILITIES OF PERSONALIZE

Content Segmentation & Targeting

Categorize users by behavior and preferences

E.g. User segmentation by season and region.



Real-Time Behavioral Triggers

Send timely content based on live user actions

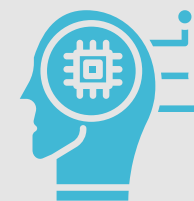
E.g. A limited-time discount to users who abandon their cart.



Predictive Recommendations

Use AI to suggest products or content tailored to user interests

E.g. Recommended new shows based on viewing histories.



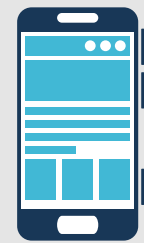
CAPABILITIES OF PERSONALIZE



Dynamic Email Personalization

Customize email content and timing for each user

E.g. Personalized emails by recommending travel destinations based on users' past bookings.



In-App and Web Personalization

Adapt site and app displays in real time

E.g. A customized homepage shows returning users products based on previous searches.



Personalized Retargeting Ads

Create retargeted ads based on user behavior

E.g. Social media ads showing running shoes to users who previously browsed similar items.



GOAL

OF PERSONALIZE

*“To demonstrate **relevancy** and make each customer **feel valued**, enhancing engagement and driving conversions across channels.”*

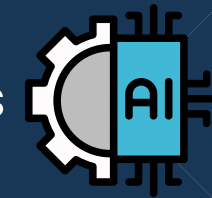
WHAT TECHNOLOGIES ARE IN PERSONALIZATION?

01



Customer Data Platforms (CDPs)

Marketing Automation Platforms



02

03



Experience Optimization Tools

Customer Engagement Tools



04

FEATURES & FUNCTIONALITIES

CUSTOMER DATA PLATFORMS (CDP)

Purpose

Collect and unify customer data from multiple sources into a centralized system to create a comprehensive, unified profile of each customer.

1

Data Integration & Unification

Aggregates data from CRM, website, email, mobile apps, social media and offline channels



2

Customer Segmentation

Uses rules and AI to segment customers based on behaviors, purchase history, demographics, and engagement



FEATURES & FUNCTIONALITIES

CUSTOMER DATA PLATFORMS (CDP)

Purpose

Collect and unify customer data from multiple sources into a centralized system to create a comprehensive, unified profile of each customer.

3

Predictive Analytics & AI Modeling

Employs machine learning to identify trends and customer needs, helping marketers identify optimal communication times and predict preferences



4

Cross-Channel Integration

Ensures customer data can be accessed across various channels (email, SMS, in-app, web) for consistent messaging



FEATURES & FUNCTIONALITIES

MARKETING AUTOMATION PLATFORM

Purpose

Streamline repetitive tasks, including email marketing and lead nurturing, to **deliver consistent, automated and personalized experiences** at scale.

1

Automated Campaign Management

Manages, and automates campaigns across channels and enables workflows that trigger messages based on customer actions

2

Email Personalization

Customizes email content for each recipient based on their behavior, preferences and segmentation



FEATURES & FUNCTIONALITIES

MARKETING AUTOMATION PLATFORM

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Streamline repetitive tasks, including email marketing and lead nurturing, to **deliver consistent, automated and personalized experiences** at scale.

3

Lead Scoring & Nurturing

Scores leads and automates lead nurturing campaigns with drip emails and targeted messages based on lead score changes

4

Customer Journey Mapping

Visualizes the customer journey and optimizes messaging timing by defining specific triggers and criteria across the customer lifestyle

FEATURES & FUNCTIONALITIES

EXPERIENCE

OPTIMIZATION

TOOLS

Purpose

Personalize digital experiences to ensure that every user sees content tailored to their preferences, behaviors and demographics

1

A/B Testing & Multivariate Testing

Tests variables of website elements (CTAs, headlines, images) to determine the most effective content

2

Personalized Content Delivery

Adjusts website or app content in real-time and enables dynamic content insertion to show tailored messaging

FEATURES & FUNCTIONALITIES

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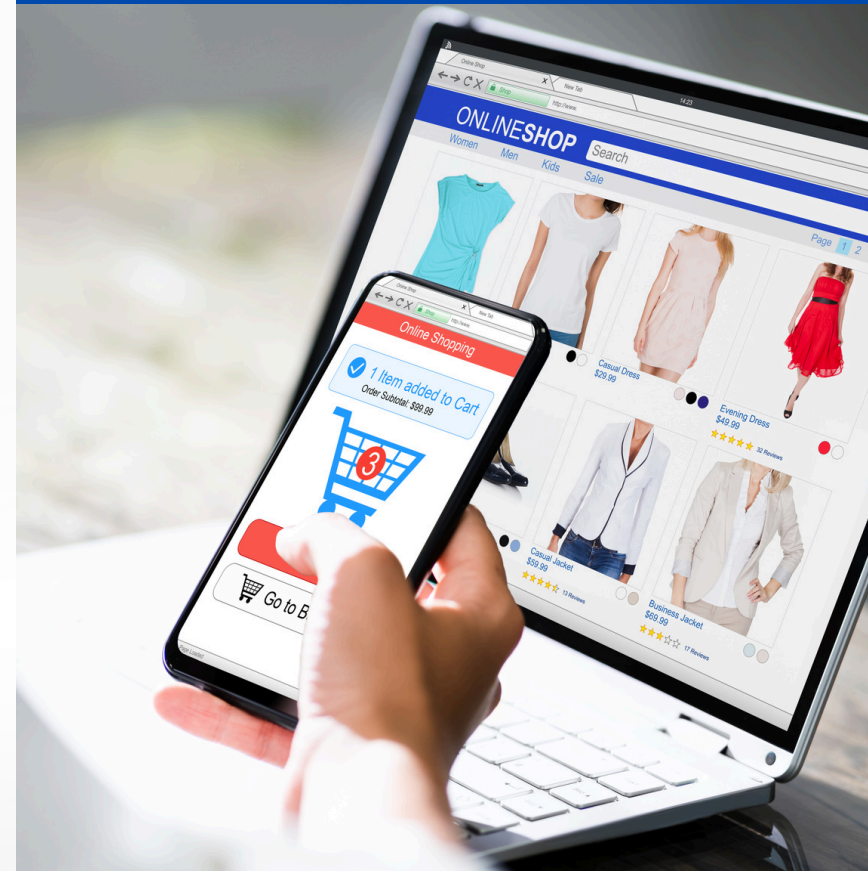
Personalized Recommendations

Employs machine learning to dynamically adjust and deliver product recommendations that align with individual behavior and preferences

4

User Behavior Analysis

Analyzes click-through rates, scroll depth, bounce rates, and engagement metrics to detect and address friction points in the journey



FEATURES & FUNCTIONALITIES

CUSTOMER ENGAGEMENT TOOLS

Purpose

Foster interaction between brands and customers across touchpoints to provide timely and relevant communication that builds loyalty

1

Loyalty & Rewards Program Integration

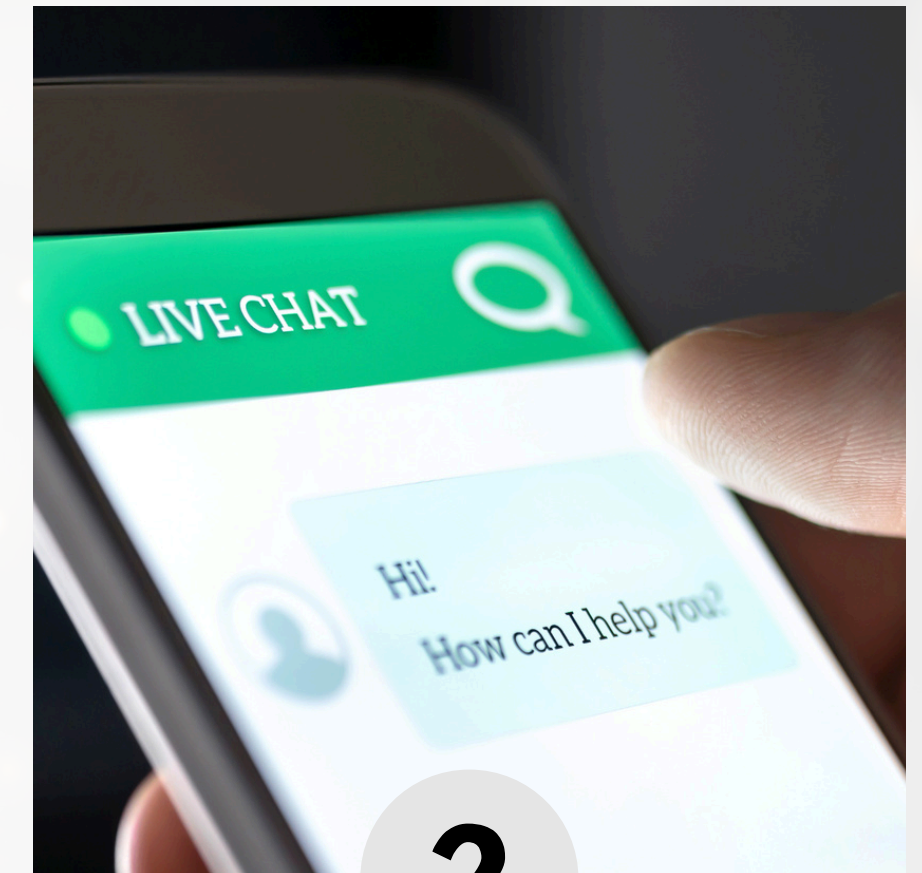
Supports loyalty programs that offer personalized rewards and discounts based on customer activity



2

In-App & Live Chat

Provides chatbots and human support to enable real-time conversations with customers for support or personalized guidance



FEATURES & FUNCTIONALITIES

CUSTOMER ENGAGEMENT TOOLS

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3

Feedback Collection

Collects customer feedback to assess customer satisfaction and integrates feedback into the personalization strategy



VENDORS

Customer Data Platforms (CDP)



Integrate **customer data** for personalized content and engagement.

Best for **companies already using Salesforce** marketing tools.

Centralize customer data for **real-time profiles** and targeted personalization using Adobe Target, Manager, and Analytics.
Best for **large companies with complex needs**.

Integrate customer data **across multiple touchpoints**.
Best for companies of all sizes that have a **variety of consumer engagement platforms**.

VENDORS

Experience Optimization Tools



Focus on **A/B testing** and optimization to enhance personalized web and app experiences. Best for companies focused on **optimizing conversion rates** through experimentation.

Offer **omnichannel personalization** with recommendations and behavioral targeting. Best for companies focused on both e-commerce and **segmented web personalization.**

VENDORS

Customer Engagement Tools



The Klaviyo logo, featuring the word "klaviyo" in a black serif font with a small black flag icon to the right, set against a white rectangular background.

Use customer data to deliver **targeted emails, SMS messages, and product recommendations** based on individual behaviors and preferences.

Best for businesses aiming to **enhance customer engagement** through personalized outreach campaigns.



Mobile-first automation platform that includes **real-time messaging, push notifications, and email**, focusing on cross-channel engagement.

Best for brands with a **mobile-first strategy** and real-time communication needs.

FUTURE MARKET OPPORTUNITIES

Increased Use of AI & Machine Learning

Automated Creative Personalization

Adjusting ad visuals and calls-to-action for unique audiences without manual input

- Open up the personalization space for businesses without in-house AI teams
- Specifically for smaller brands / agencies

Growth in Cross-Platform Data Unification

Omni-channel Data Aggregation

Data platforms that integrate across industries (e.g., retail and healthcare)

- Create more accurate and comprehensive customer profiles
- Cross-industry applications in personalization

FUTURE MARKET OPPORTUNITIES

Enhanced Privacy Features & Transparency

Growing Demand for Privacy-Centric Data Solutions

New solutions that support data compliance

- Gain traction in heavily regulated industries
- Anonymized insights, without tracking individuals
- Stay competitive without third-party reliance
- Blockchain technology: offers complete transparency

Predictive & Prescriptive Analytics

Proactive Engagement Tools & Campaign Strategy Optimization

- Specialized predictive analytics platforms targeting niche markets (ex. education and local retail)
- Prescriptive analytics platforms for small to medium-sized businesses: employ data-driven strategies without requiring extensive budgets

NAVIGATING FUTURE RISKS

Balancing Innovation, Privacy, and Consumer Trust



Data Privacy and Security Risks

- Data breaches or cyber-attacks
- Perceived misuse of customer information
- Compliance challenges with global privacy regulations



Ethical/Bias Concerns with AI and ML

- Algorithmic bias and fairness issues
- Overly targeted recommendations or behavioral nudges
- Lack of transparency can lead to mistrust



Overdependence on Technology

- Loss of human insight and creativity
- Operational risks from technical failures
- Customer desensitization to personalization
- Dissatisfaction if customers feel that their issues require human attention

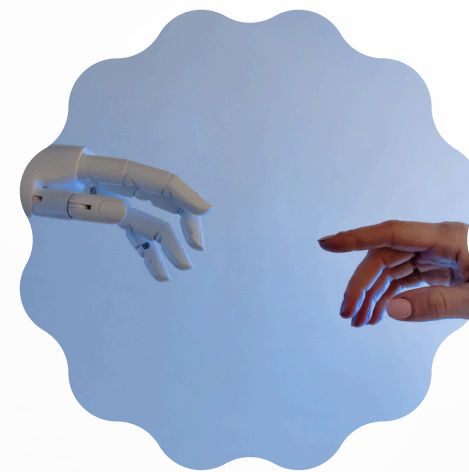
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A top-down view of a desk with various items: a laptop, a cup of coffee, a pen, a notebook, glasses, and a plant. The text "THANK YOU" is centered in the middle of the image.

THANK YOU

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