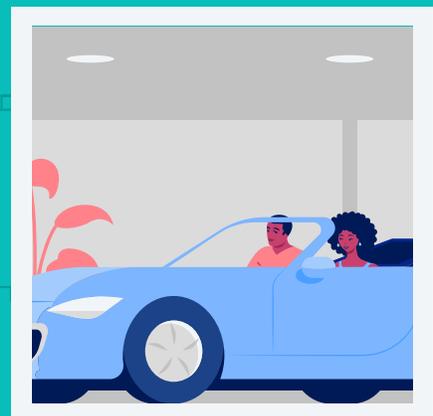
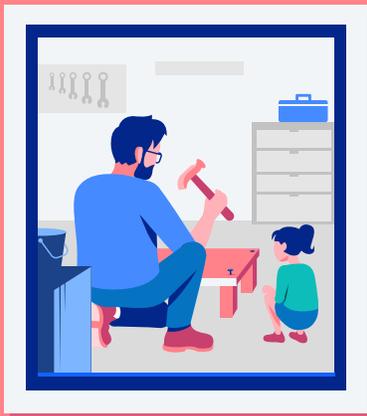




# Experience smarter personalization fueled by data

Powered by Adobe.

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# The personalization gap

## Companies struggle to turn data into experiences that fuel customer loyalty, trust and growth.

A [global Forrester Consulting study](#) commissioned by IBM illustrates that there's a disconnect between how consumers feel about personalization strategies and how companies view their efforts: 90% of firms said personalization is imperative to their business strategy, but only 39% of consumers reported receiving relevant brand communications.<sup>1</sup>

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Even with flawed execution, organizations are encouraged by success measures, a strong indication that the potential is exponential if done right. Firms surveyed reported improvements across almost every metric, including net promoter score, average cart size and order frequency. And on top of the improvements, they realized a 33% increase in customer loyalty and engagement, a 6% increase in sales revenue and an 11% decrease in marketing costs.<sup>1</sup>

The revenue-growth potential is dramatic: IBM surveyed 400 US-based executives and line-of-business leaders across multiple industries who work with digital-experience platforms that use Adobe customer-experience capabilities. These experience leaders reported 3x higher revenue growth in the past two years than businesses that place less emphasis on customer-experience (CX) enhancements.<sup>2</sup>

“It’s only personalization if you get it right. Otherwise, it’s just marketing. You can’t check the box on personalization unless you get it right by your consumers.”

**Brendan Witcher**

Forrester Consulting analyst

# Roadblocks on the path to personalization

**Overcoming barriers to personalization requires transformation of your people, processes and platforms.**

Customer demand isn't the only driver of change. Instead, the catalysts include consumer privacy regulations, an increasingly cookie-less world, the need to deliver seamless omnichannel experiences as people return to stores, a holistic view of CX and reevaluating legacy strategies.

We believe the rise of the platform economy and the need to exponentially increase the lifetime-customer value demands a shift from personalizing media platforms to personalizing customer-experience platforms. This is an operational, rather than strategic, challenge that brands struggle to address. It requires process, data and technology synchronization and integration across the entire value chain including marketing, sales, manufacturing, logistics and finance. Fundamentally, companies lack the proper operating model that cuts and integrates across enterprise functions to deliver customer personalization at scale.

In this evolving world, companies will come to rely on a new breed of strategic partners to help navigate personalization imperatives—strategic partners that can synthesize design, analytics, data, complex technology integration and business-transformation capabilities to drive industry-transforming customer experiences.

# Three key pillars of personalization

## 1. Data as fuel

While firms have no shortage of data, personalization strategies often fall short of converting it into actionable insights. Every data point represents a person and a successful personalization strategy starts with people's actions, needs and desires. It ends with turning data and code into experiences that show understanding and empathy.

IBM data and analytics experts help you unlock data insights and enable better decision-making to help you anticipate customer needs.

## 2. The right platform

A customer data platform is the foundation for personalization. Its integrated database and machine learning capabilities deliver always-on personalization at scale. Using a properly configured customer data platform combines disparate data sources and gives companies tools to generate customer insights and drive optimum results.

[Adobe Experience Platform](#) is an open, intelligent platform that brings together many data streams for a 360-degree customer view. This capability helps ensure delivery of the right offer to the right person at the right time, using the right communication.

## 3. Experience-led design and delivery

Personalization is a set of processes and capabilities that cut across traditional enterprise functions. Companies need an integrated enterprise-wide business strategy that calibrates the human-technology partnership. This strategy requires a shift from a piecemeal approach to an enterprise-wide focus.

Business design is a human-centric, outcomes-driven approach to deliver meaningful experiences for customers, employees and business partners. [IBM iX®](#), the business design consulting arm of IBM, has the experienced strategists, designers, developers and data architects to help clients reimagine their businesses. We deliver the customer experiences of the future—with speed and at scale.

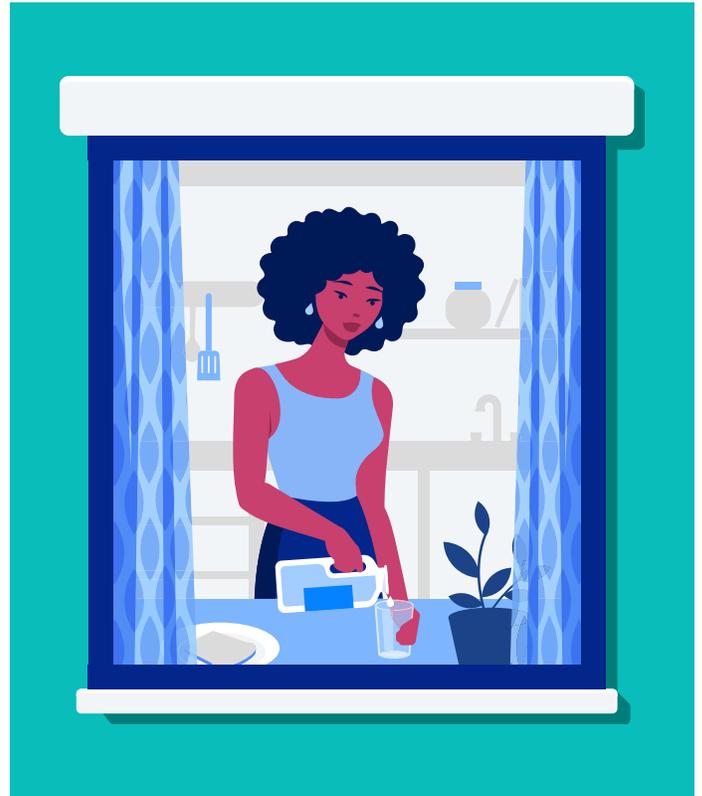
# Here are three real-world examples of personalization in action

## 1. Does your grocer know who you are, what you need and when you need it?

**Meet Zoe:** A busy mom who realizes she needs groceries heading into a long holiday weekend.

**Her personalized experience:** Zoe's grocer anticipates her needs based on her shopping history, preferences and timing with the upcoming three-day weekend. The grocer sends Zoe an alert prompting her to check her grocery app where her cart is populated with everything she needs—and even some recipes and goodies she may enjoy. She confirms the cart contents and arranges delivery in one click, saving a trip to the store. Added bonus: the grocer offers her tickets to a local wine festival and a coupon for her favorite pinot noir.

**How we did it:** Zoe's transactions, both in-store and online, were captured and stored in a data lake that feeds Adobe Experience Platform to build her real-time profile including shopping preferences. As a loyal shopper, the grocer has the data it needs to help Zoe build her shopping cart. By using segments in Adobe Experience Platform other relevant offers can be extended to her, such as tickets to the wine festival and a coupon for her favorite wine. The grocer was able to execute this personalized campaign, from creating content to orchestrating offers, using Adobe Workfront to manage the end-to-end process seamlessly across multiple teams.



## 2. When does a bank become a trusted partner for major life milestones?

**Meet Sarah:** A first-time home buyer looking for a two-bedroom home in the city.

**Her personalized experience:** While browsing home listings, Sarah gets a targeted ad that reads “Thinking of taking that first step on the property ladder? See how much you can borrow!” She puts her information into the mortgage calculator and is recognized as an existing bank customer. Her bank informs her she can afford a \$400,000 house and sends a notification about nearby listings that fit her criteria. Sarah takes a virtual tour of one property and puts in an offer that’s accepted. As a thank you, her bank sends her relevant notifications, such as a moving checklist, insurance quotes and even a delivery coupon to a favorite local restaurant.

**How we did it:** Sarah’s bank uses Adobe Experience Platform to create profiles for its customers to deliver a better experience. Part of this integration includes ingestion from realtor sites. Once Sarah notifies her bank that she is looking for a house to purchase, the system aggregates the information provided, such as income, address and the home price she can afford. The system then compiles a list of available homes in the area. After Sarah decided to purchase a property, she fills out the application and is subsequently approved. This information is sent back to Adobe Experience Platform to populate her profile and categorize her information into customer segments, such as first-time homeowners and people who want to live in a certain area. These segments help curate notifications that are sent through Adobe Campaign, such as partnering with the food-delivery service.

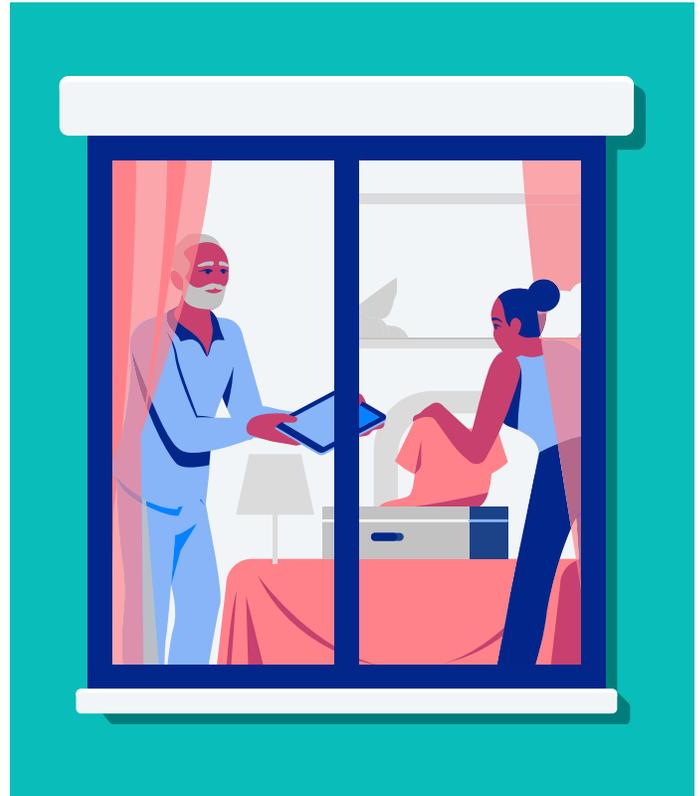


### 3. Family phone plans save you money, but do they give everyone what they need?

**Meet Jed:** A father looking to upgrade his daughter's phone plan before her backpacking trip through Europe.

**His personalized experience:** Jed signs into his account and is prompted by a notification option to add international lines and significant upgrade benefits. This timely prompt saved Jed money and time and provided additional security benefits. After the upgrade, Jed received a push notification about how to create an account for his daughter and send her bills directly.

**How we did it:** Using predictive modeling, based on data stored in the carrier's data lake, we anticipate what type of needs a person in each age demographic could face and make recommendations on how to best serve the customer. Jed knows that a change will need to be made to his daughter's phone, and his carrier uses modeling to determine that updating to the premium package will not only save the most money but will be the most secure option. Adobe Campaign will send pertinent messages to him.



# Our approach

Our personalization blueprint starts with the desired business outcome and works back to develop a minimum viable product prototype. Our multi-week collaboration [following our IBM Garage methodology](#) defines the right vision and path along with the materials that support your investment.

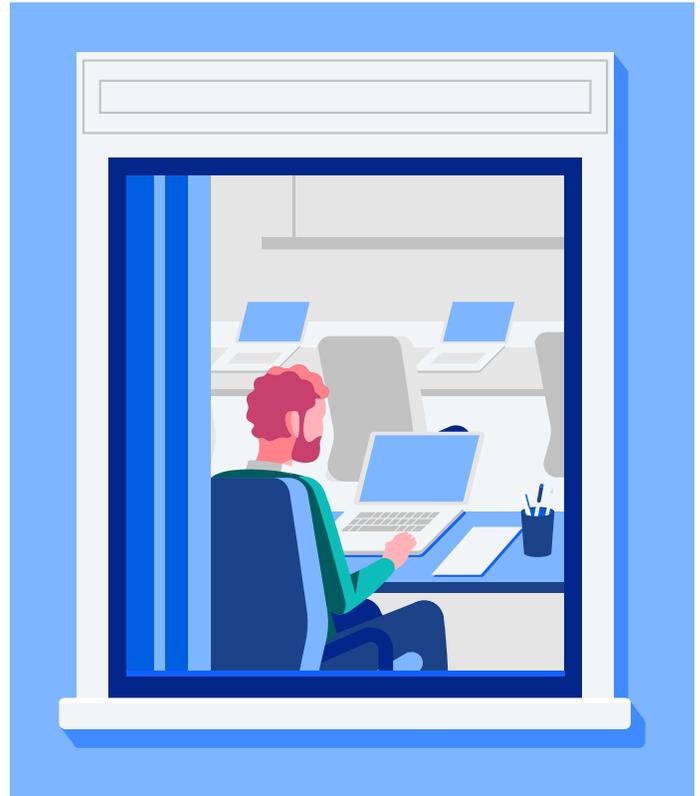


# The ideal partnership for personalization

IBM combines experience design, data and analytics and platform-implementation capabilities with Adobe Experience Platform and Adobe Experience Cloud solutions. Paired with Adobe Experience Manager, [certified and delivered on Red Hat® OpenShift® on IBM Cloud for Financial Services™](#), companies in financial services and regulated industries are able to deliver the same personalized experiences, at speed and at scale, while meeting the highest regulatory and security requirements.

“When you combine the IBM deep industry and design expertise, tech implementation capabilities and trusted relationships with chief information officers, with Adobe’s deep ties to chief marketing officers and standing as the platform for customer experience, you have all the right ingredients for client success.”

**Judith Hammerman**  
Head of Americas Sales  
Adobe Experience Platform



Are you ready to advance your personalization journey?  
Contact your IBM account representative for a CX  
Personalization Assessment Workshop with IBM iX.

**To learn more about the IBM and Adobe partnership, visit:**  
[ibm.com/services/adobe-services](https://ibm.com/services/adobe-services)

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1 "Personalization Demystified: Enchant Your Customers By Going From Good To Great," Forrester Consulting, February 2020. <https://tools.marketimpacttools.com/go/ibm/personalization/?lang=en-us>

2 "Optimizing your DXP capabilities," IBM Institute for Business Value, July 2021. <https://ibm.co/optimize-dxp>

