

CUSTOMER LIFECYCLE MANAGEMENT

Progressive Personalization Playbook

Solve your personalization problems with intelligent
customer lifecycle management.



Hero
DIGITAL

Progressive Personalization Playbook

Create experiences that truly enhance people's lives.

Companies with stellar personalization strategies achieve improved marketing efficiency, higher digital sales, and long lasting customer relationships. Achieving personalization at scale requires better targeting and tailored experiences with both unknown and known customers.

Hero Digital's Progressive Personalization Playbook gives you the tools to align with your customers' values, help them with their decisions, and make them feel heard and understood.

In a world of distractions, Hero Digital helps business leaders get closer to the people they serve and create digital experiences that truly enhance people's lives. Dive into this report to engage with people in meaningful ways across their entire lifecycle.

Contents

- 01** Solving Personalization
- 06** Identify
- 09** Architect
- 12** Orchestrate
- 15** Advance
- 18** Case Studies
- 24** Solution
- 28** Jumpstart Personalization



Personalization isn't living up to its potential

The pursuit of personalization has become such a focus for many business leaders that we often lose sight of why we even want it and what it means to us. The truth is personalization is an over-hyped word with a complex paradox behind it.

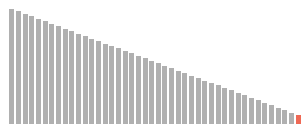
Hero Digital's customer experience research reveals that, instead of personalization, people expect to achieve their goals easily, without compromise.



HIGH EXPECTATIONS

71% of customers expect companies to be well informed about their personal information during an interaction

Source: 2022 Gartner Customer Service and Support Survey



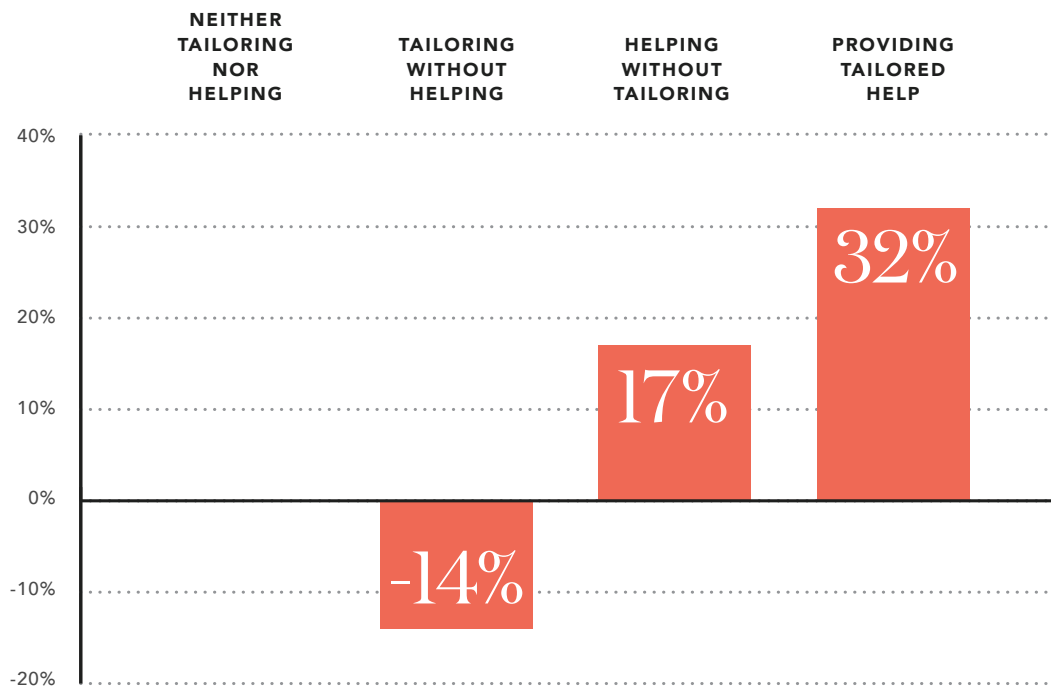
LOW OUTCOMES

Personalized Experiences ranks 44 out of 45 attributes that drive brand advocacy

Source: Hero Digital CX Index - Consumer Goods

Tailored help builds trust

It's time to move beyond brand stewardship, lead generation, and sales support. To provide tailored help, we have to be **INFORMATIVE**, **SUPPORTIVE**, and **TRUSTWORTHY**.

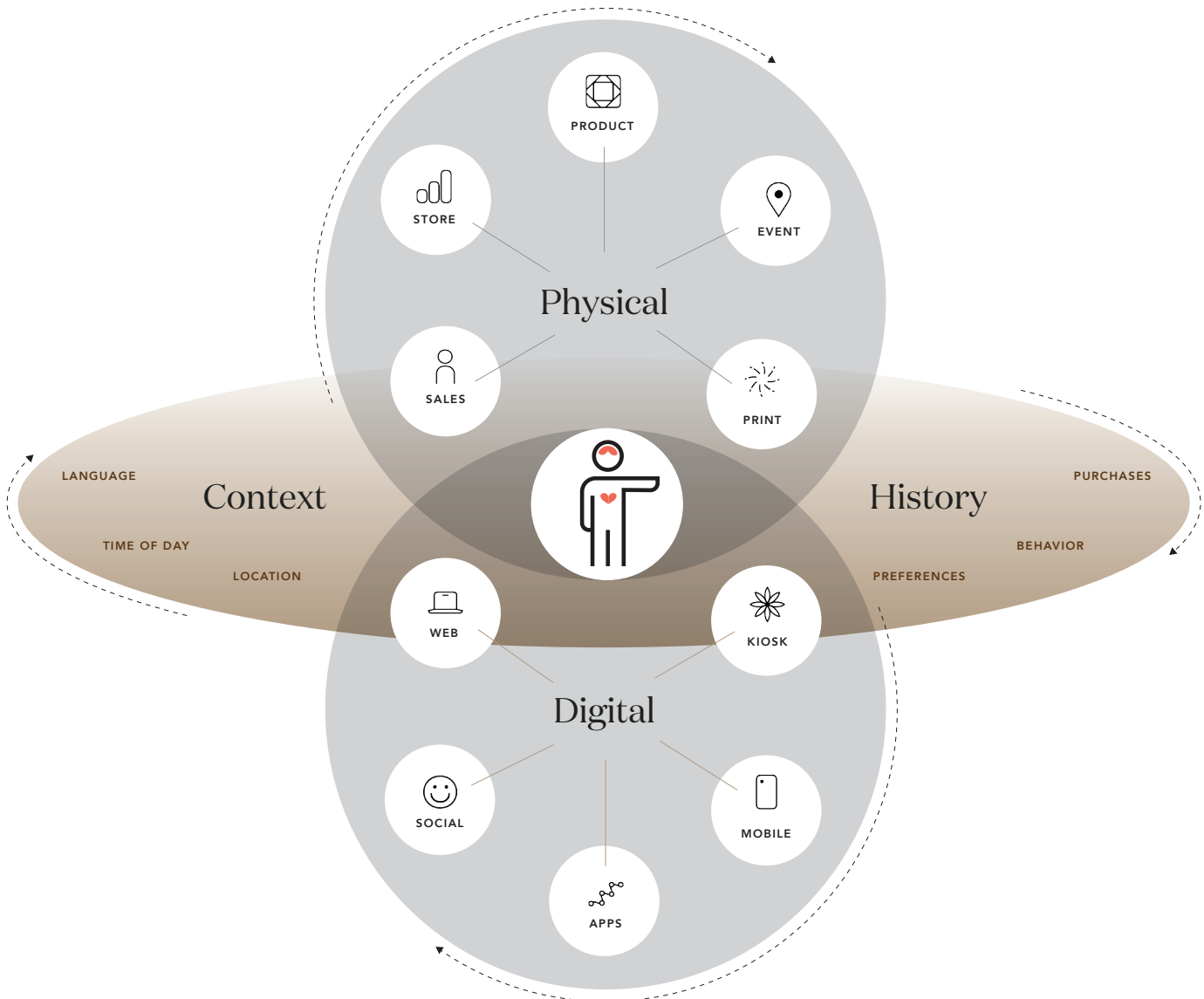


Source: Gartner 2022 Personalization Survey

Hero's approach

We must get closer to the people we serve and fulfill a purpose. One-to-one personalization is just a part of the spectrum of ways for you to connect with your customers.

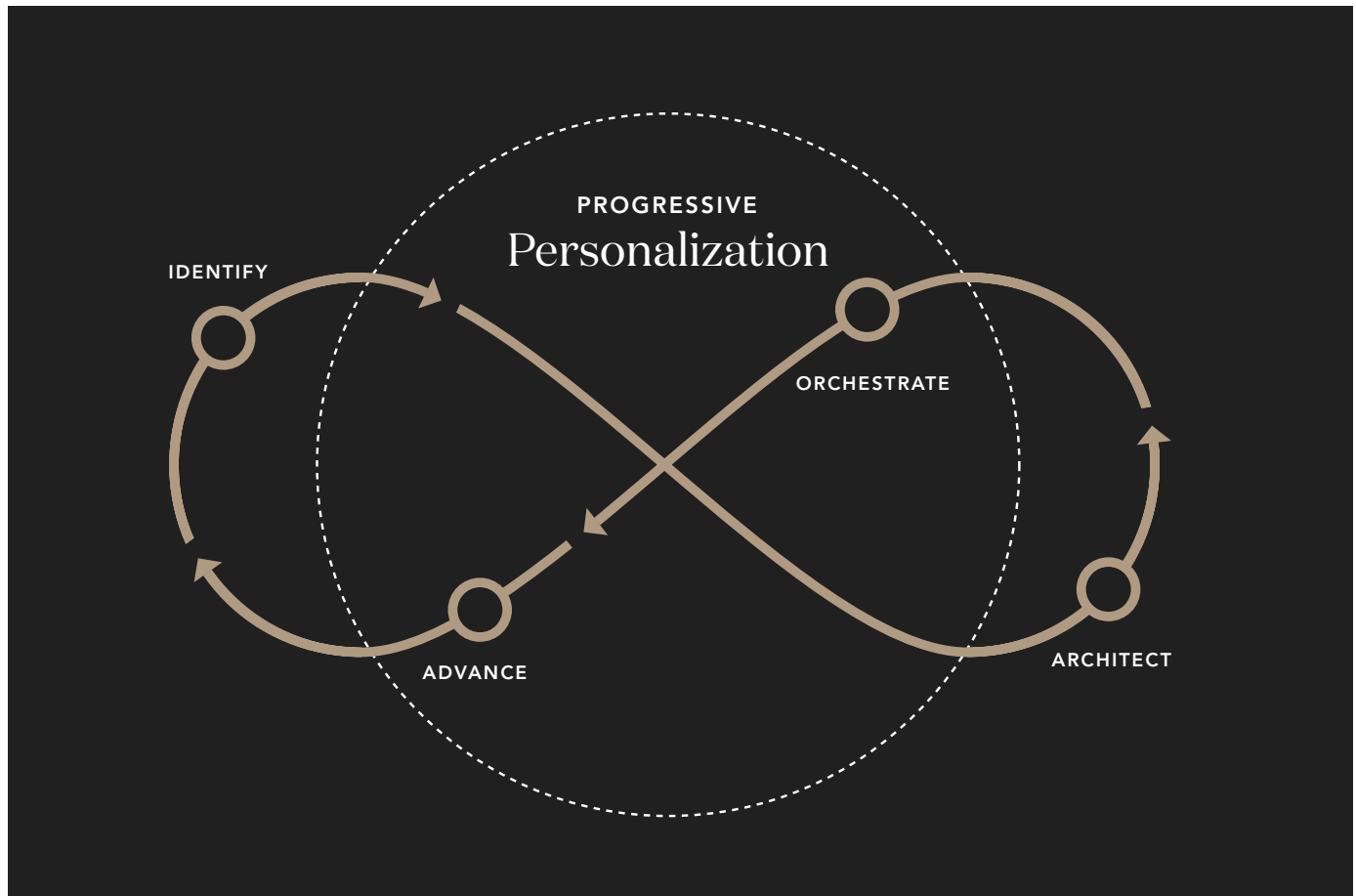
Achieving relevant personalization at scale requires understanding your customers on a deeper level. People need to see and hear from you at the **RIGHT TIME**, with the **RIGHT MESSAGE**, across every touchpoint.



Gaining relevance as you progress

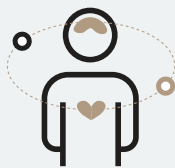
Personalization works best when it advances across the spectrum over time and gains **MOMENTUM** as it grows.

Through Hero Digital's progressive personalization process, you will create personalized experiences that resonate on a human level and build lasting customer relationships.



Four phases of progressive personalization

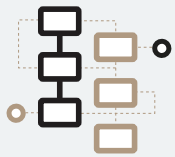
As you progress your personalization strategy, it's essential to continually refine your methods across every phase.



PHASE 1

Identify

Define target customer microsegments and journeys.



PHASE 2

Architect

Create a content architecture, data strategy, and testing plan.



PHASE 3

Orchestrate

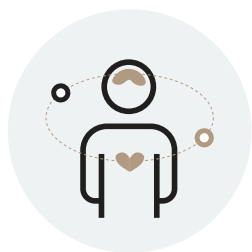
Deploy tailored content with precision messaging across multiple channels.



PHASE 4

Advance

Optimize with iterative test-and-learn strategies.



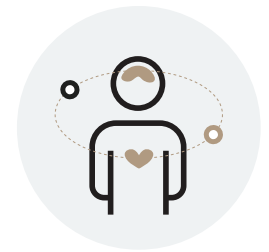
PHASE 1

Identify

Before you begin thinking about content and data, identify the points in the customer journey where personalization creates value. This helps crystallize your goals and KPIs.

Understand on a human level

Define target customer microsegments, personas, and journeys. Don't forget to dig into your segmentation model. It's essential to examine attitudes, values, and behaviors for each persona.



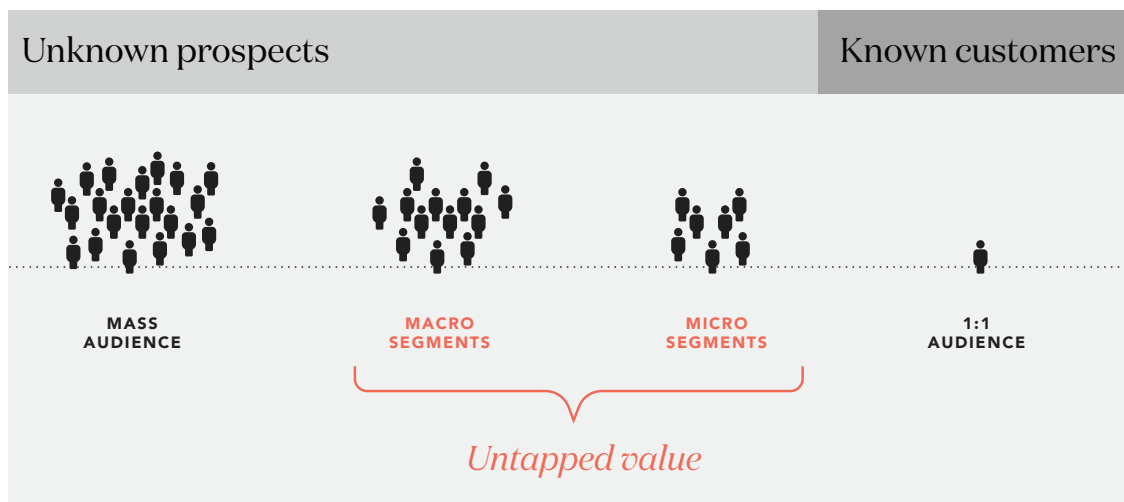
PHASE 1

Identify

DEFINE TARGET CUSTOMER MICROSEGMENTS

Achieving the goal of relevance at scale requires better targeting and tailoring of both unknown and known customers.

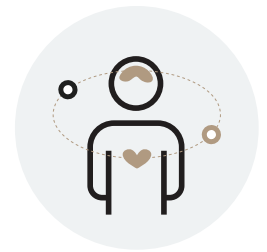
Advancing personalization capabilities is not about moving from mass to 1:1—it's about getting more and more advanced over time across the spectrum.



Look a layer deeper

After you've carefully developed each microsegment, walk in your customers' shoes. Make sure to understand their pains, goals, and needs.

Call out where key value exchanges intersect with high-level products and services, promos and offers, and unique channels.



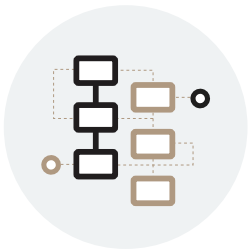
PHASE 1

Identify



KEY RESULTS

- ✓ Microsegment Definitions
- ✓ Customer Personas
- ✓ Human Journey Map
- ✓ Customer Engagement Strategy



PHASE 2

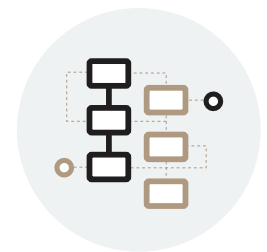
Architect

During the architect phase, technology merges with creative messaging ideas. Consider new digital spaces where people are spending time.

Merge technology with creative

Ensure ongoing alignment on marketing, customer insights, data, analytics, and tech activities.

Map your technology capabilities and vendors based on important interactions. Identify the data you need and the tools, platforms, and partners needed to enable the future experience.



PHASE 2

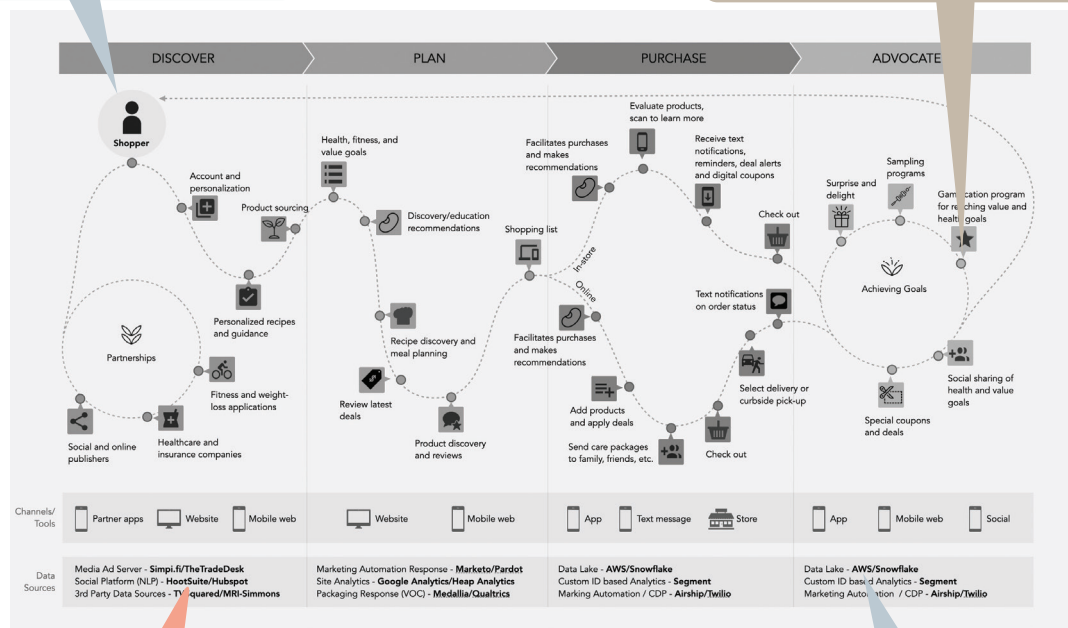
Architect

AUDIENCE

Key insights into your audience's mindset and behavior

INTERACTIONS

Natural touchpoints your audience may utilize to achieve their goals



DATA

Information you need to empower your planned experience

TECHNOLOGY

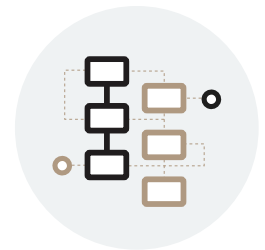
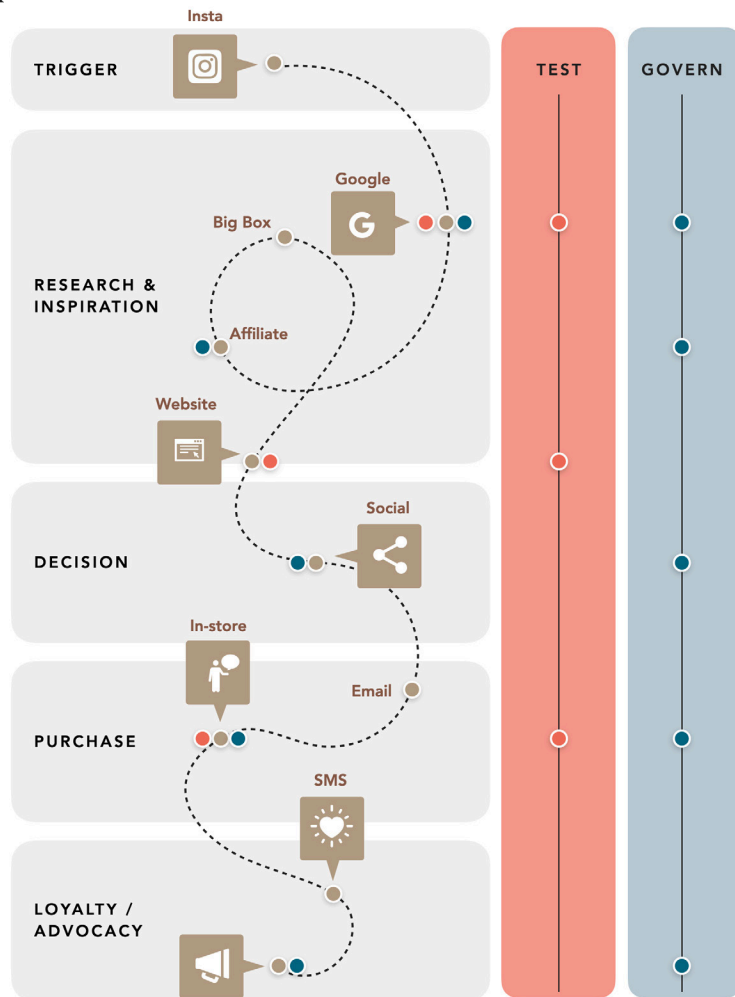
Critical platforms needed to orchestrate the planned experience



Future experience

Develop a future experience lifecycle blueprint. Layout end-to-end, cross-channel interactions with layers that tie together customer behavior with high-level content and messages.

At each interaction point, set up systems to test and update your governance model. This ensures that your approach serves business goals and aligns with your organization's ethical, legal, and compliance limits.



PHASE 2

Architect

KEY RESULTS

- ✓ Lifecycle Blueprint
- ✓ Messaging Architecture
- ✓ Data Strategy
- ✓ Testing Plan
- ✓ Technology Configuration
- ✓ Governance Model



PHASE 3

Orchestrate

Once the technology is in place, it's time to execute. This is when creative assets are developed and deployed. As you collect more customer data, it's possible to deliver dynamic content tailored to individual human needs.

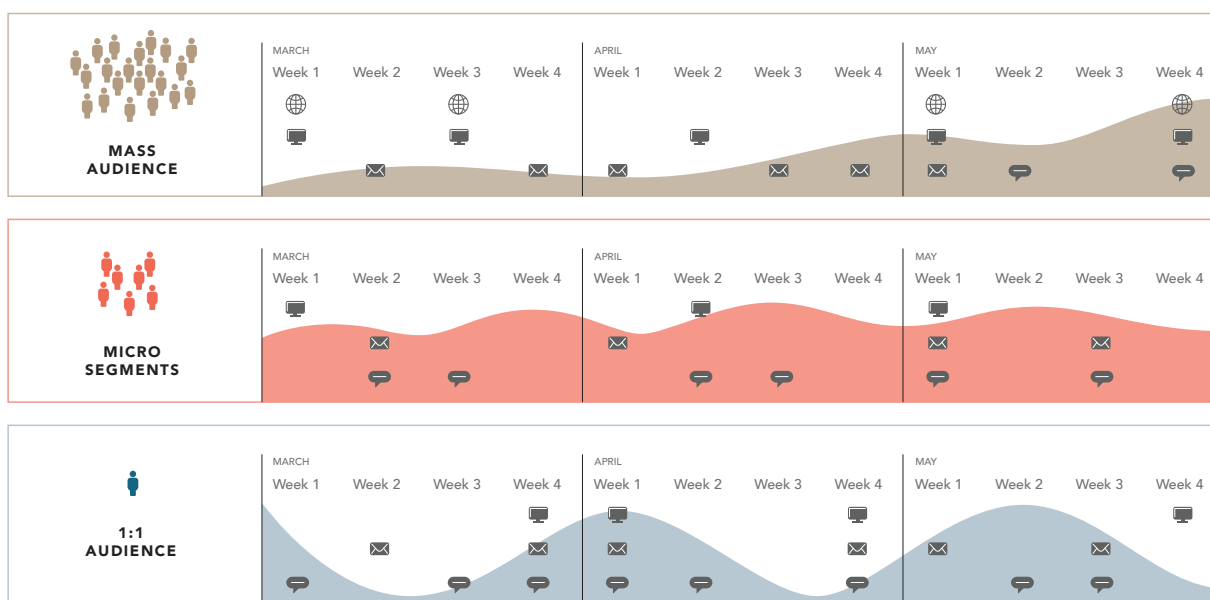
Make it personal when it counts

Machine learning (ML) makes personalization scaleable. As you collect customer data—their behavior and preferences—ML algorithms become more sophisticated at predicting user preferences and choices over time.



PHASE 3

Orchestrate



PRECISION OVER TIME

Using ML, personalization process becomes a self-perpetuating cycle where the model learns from customer behavior while continuing to serve up highly personalized recommendations to your customers.

ML models power product recommendations, next-best offers, real-time cart abandonment (and suggest offers to keep customers in the buy flow), while also clustering new (first-time) visitors into pre-defined segments so the experience can be personalized from the get-go.



Align with intelligence

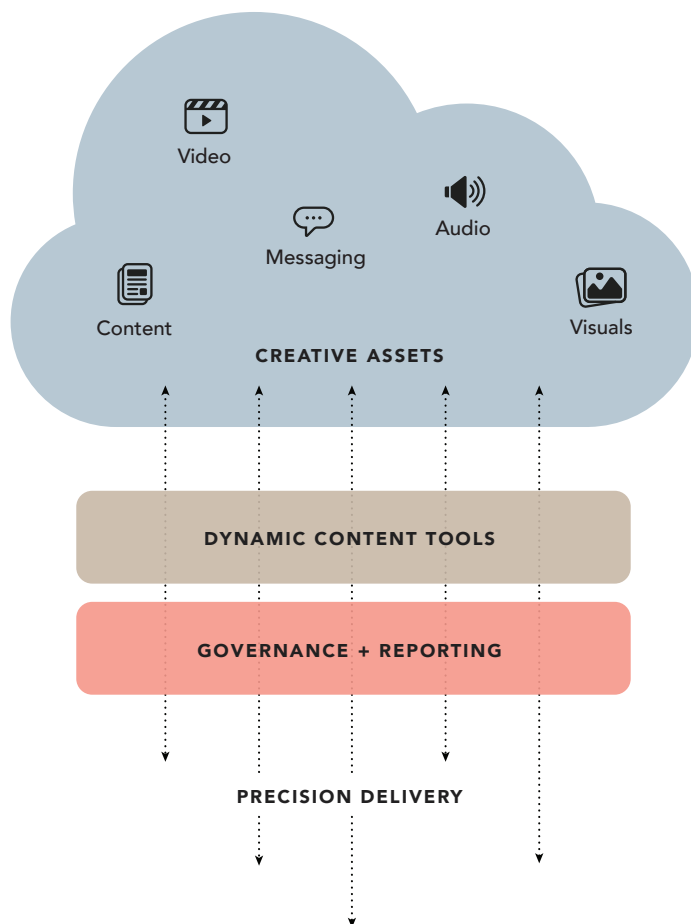
Orchestrating progressive personalization is complex. Diligence is required to remain relevant and continually improve.

It's important to activate a governance model, making sure to communicate roles and responsibilities, while also aligning on strategy, execution, measurement, and optimization plans.



PHASE 3

Orchestrate



KEY RESULTS

- ✓ Creative Asset Repository
- ✓ Dynamic Content Tools
- ✓ Metric Templates
- ✓ Optimization Plan
- ✓ Governance Conference





PHASE 4

Advance

As personalization progresses, it's important to continually refine and improve your strategy based on data. To gain momentum, and mature over time, you must test, learn, and optimize.



Test, learn, and optimize

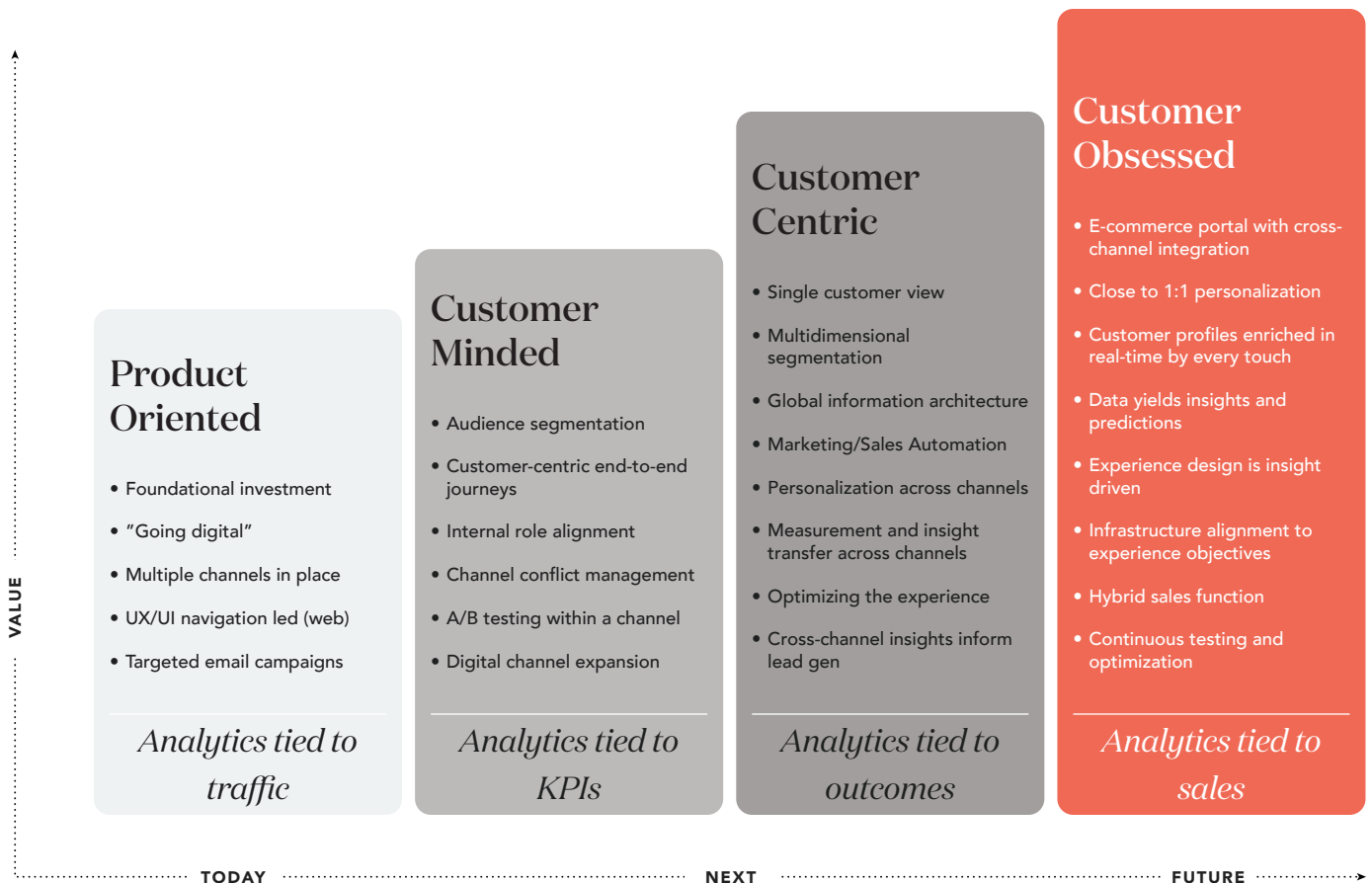
Capture, analyze, and report holistically across channel and customer performance data. By synthesizing insights, you can intelligently translate and activate strategic and tactical modifications.



PHASE 4

Advance

CUSTOMER OBSESSION MATURITY EVOLUTION



Dynamic testing

Dynamic test-and-learn ecosystems fully engage with customers and uncover truths about their desires.

Each touchpoint is an occasion for testing, and every employee is a purveyor of data insights. Every process and decision must pass the touchstone of testing.

To succeed, you must collect the right customer feedback, be ready to fail on the path to discovery, and manifest agility, with the willpower to pivot when necessary.

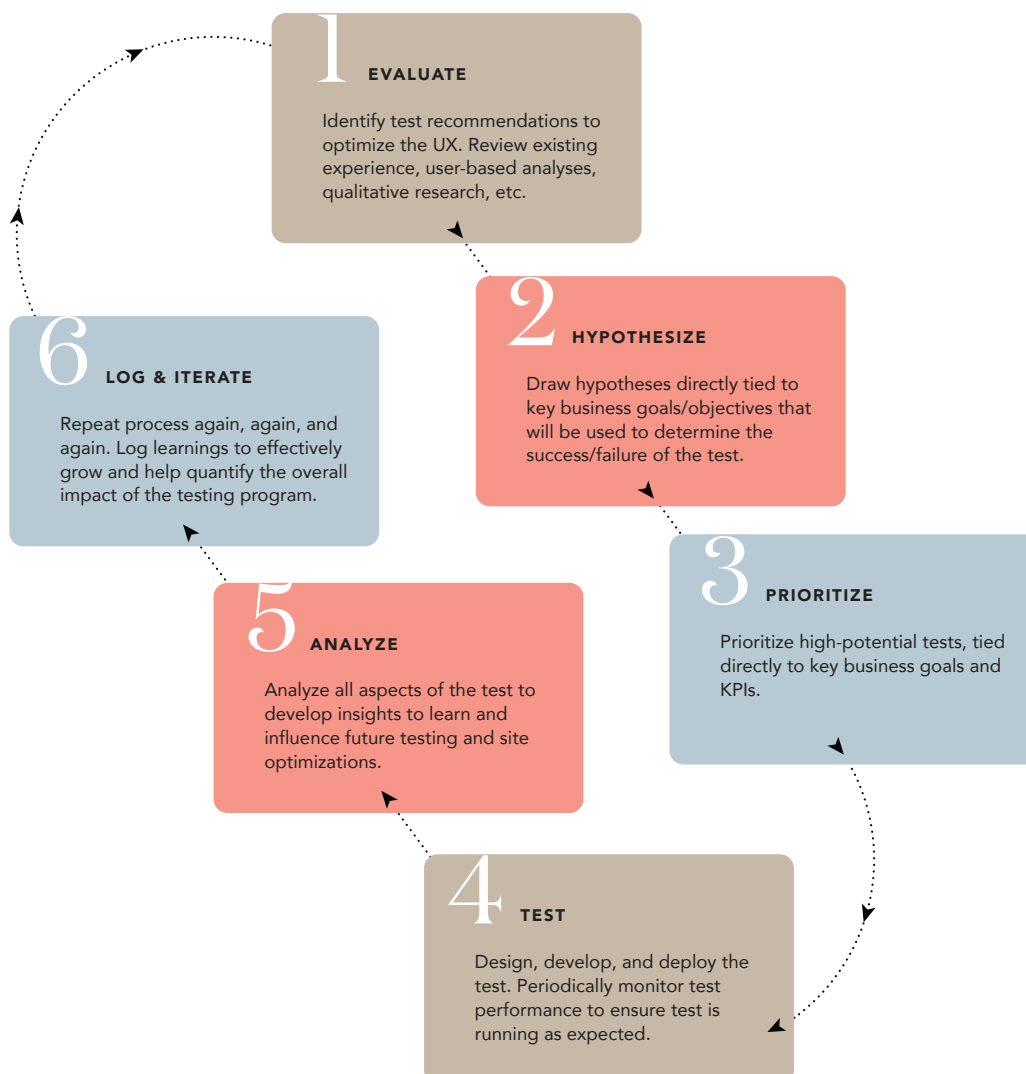


PHASE 4

Advance

KEY RESULTS

- ✓ A/B and Multivariate Testing
- ✓ Data Insight Reports
- ✓ User-generated Content Analysis
- ✓ Revised Lifecycle Maps



B2C CASE STUDY

Plenity by Gelesis

When Gelesis launched Plenity®, a weight management product backed by behavioral science, they needed a partner to create a digital ecosystem that offered support, education, and community.

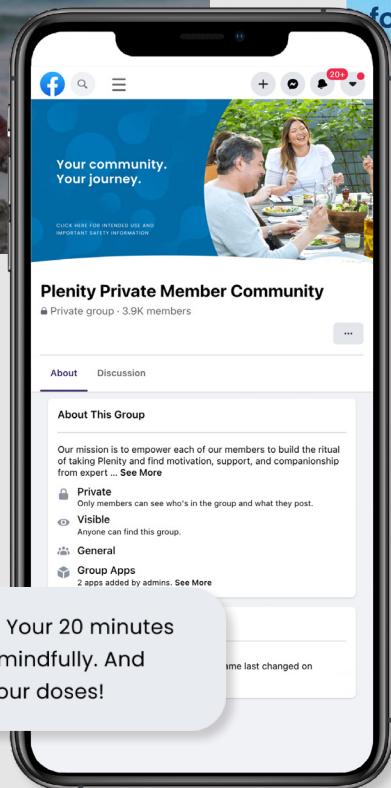
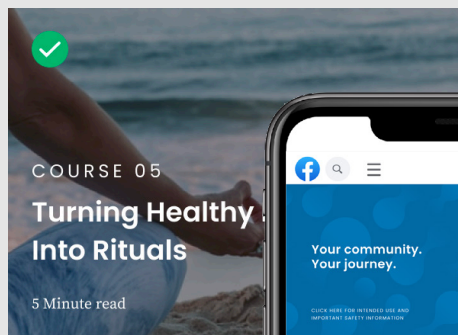




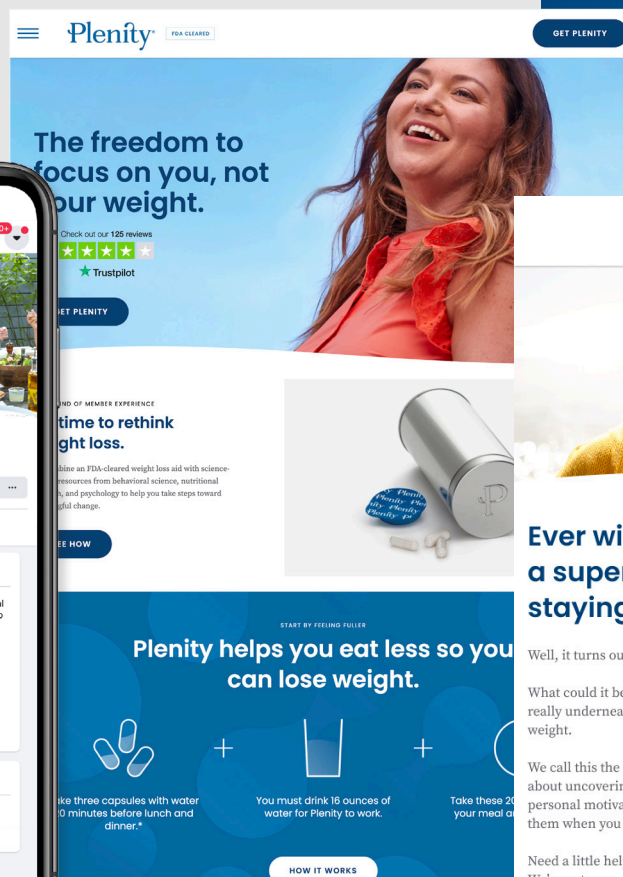
Creating a connected experience

TRUTH People value personalized support throughout their weight loss journey.

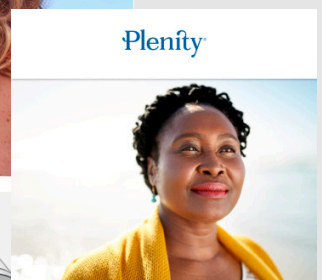
BEAUTY Encouraging healthy rituals by combining a groundbreaking product with digital support, education, and community.



Plenity Reminder: OK! Your 20 minutes are up! Time to eat—mindfully. And don't forget to log your doses!



Do you feel like Plenity is helping you make progress toward your goal?



Ever wish you had a superpower for staying on track?

Well, it turns out that you already do!

What could it be? Well, it has to do with what's really underneath your desire to manage your weight.

We call this the Big Why and COURSE 02 is all about uncovering yours. Dive deep into your personal motivators and learn how to lean on them when you need a boost.

Need a little help tapping into your Big Why? We've got you covered! We've got some reflection questions to help you figure it out.

START COURSE 02



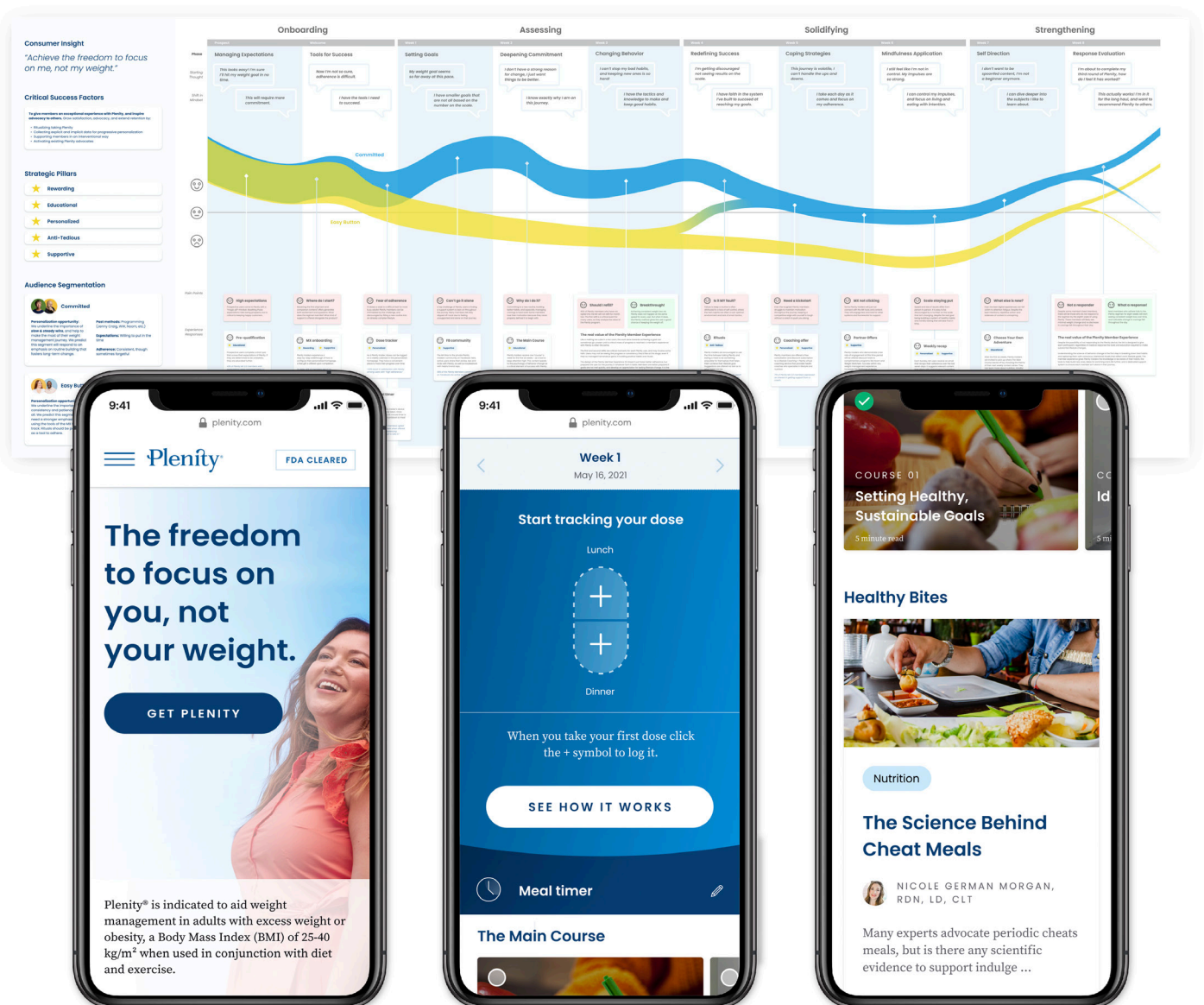
Plenity®

VALUE TO PEOPLE

A continually evolving experience that brings together educational content, adherence tools, and health and wellness partners

VALUE TO BUSINESS

A digital member experience that inspires program commitment, while also empowering members to live healthier lives



B2B CASE STUDY

Elan Financial Services

A Division of U.S. Bancorp

Elan—a white-label credit card provider—needed a partner to seamlessly close the knowledge gap so bankers could feel confident and empowered to drive sales of new cards and retain existing cardholders.

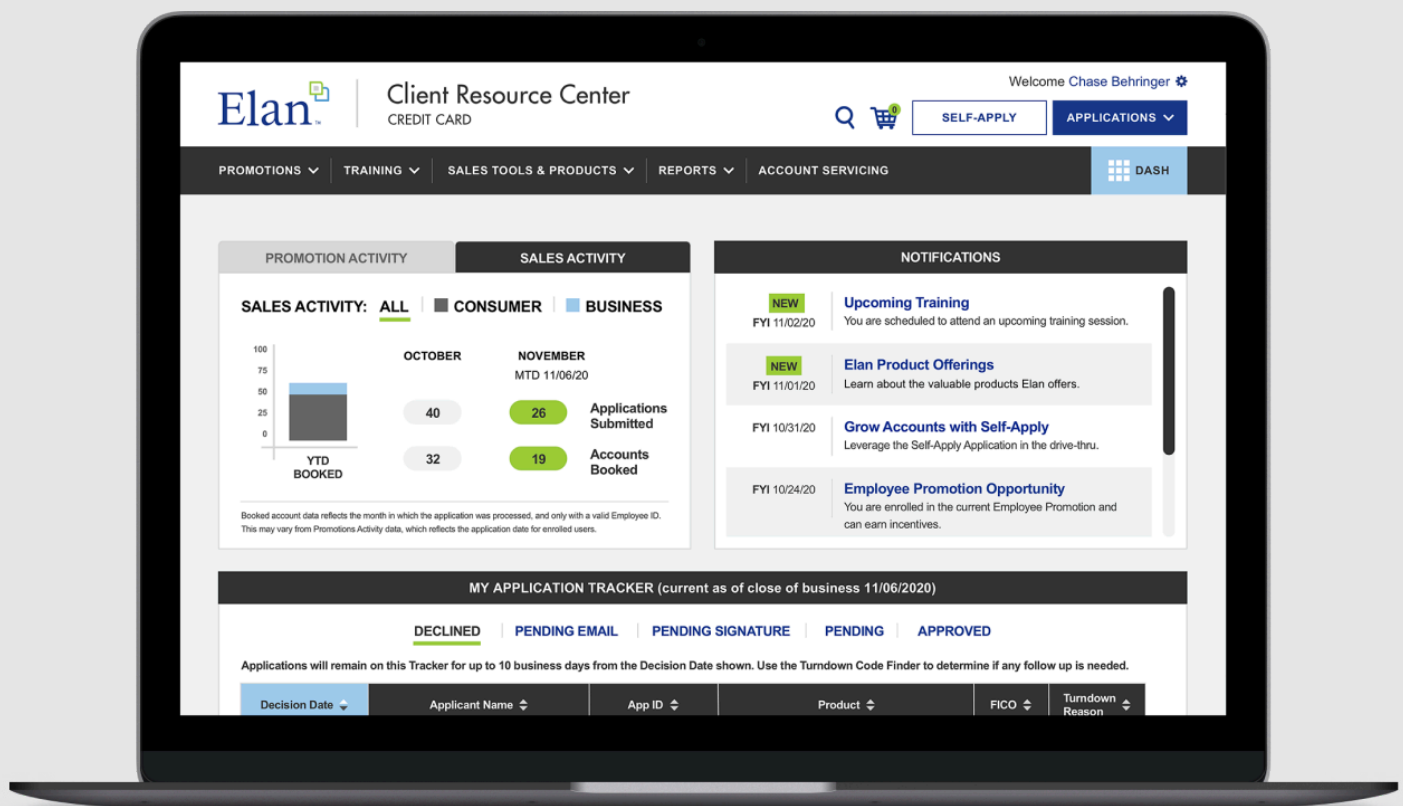




Driving revenue with insight

TRUTH Success happens when sellers are armed with knowledge about the right product for the right customer at the right moment.

BEAUTY A self-service digital ecosystem that empowers bankers at 1,300 financial institutions.



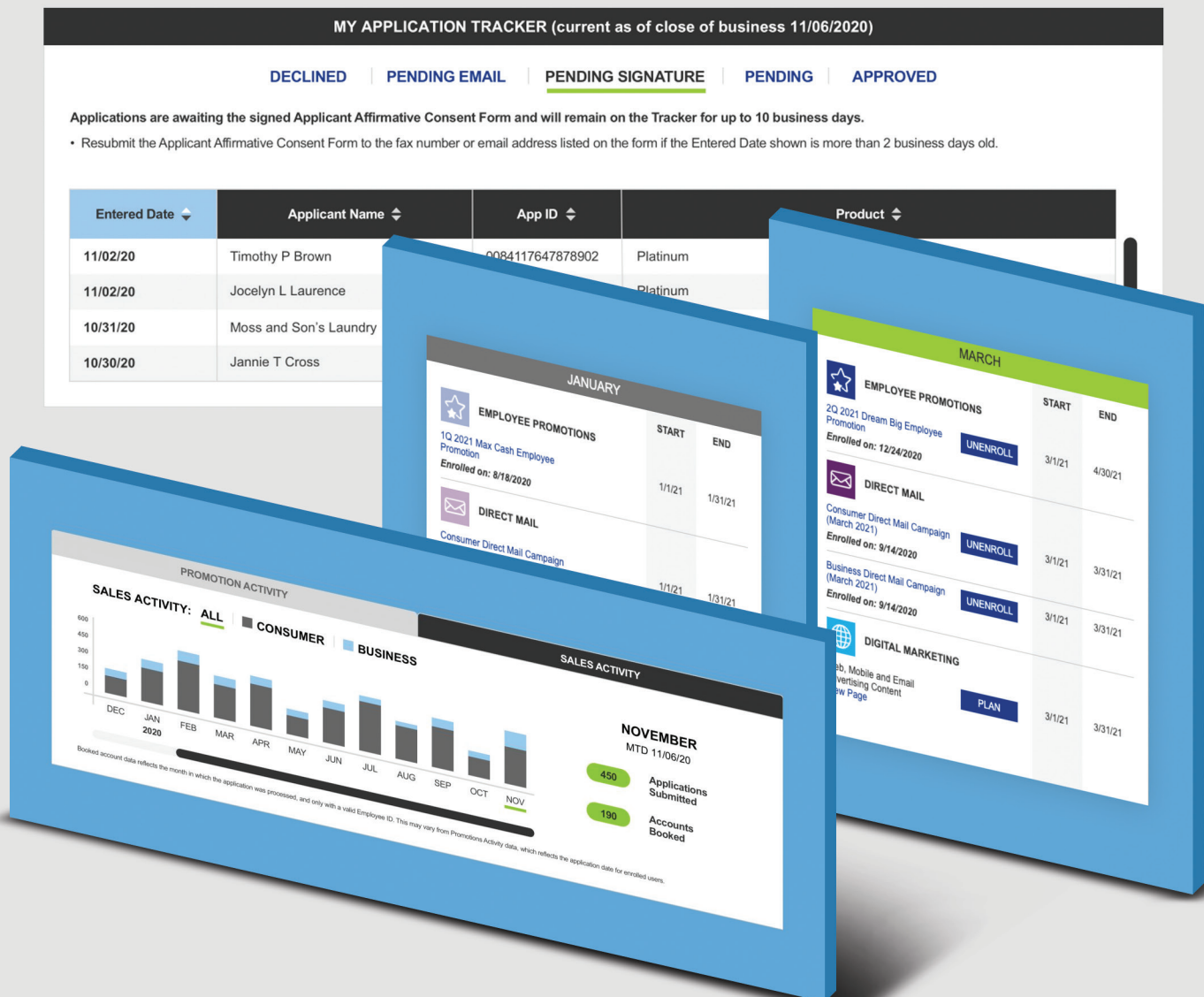


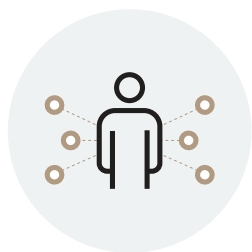
VALUE TO PEOPLE

A business-critical technology platform that's fully integrated into their partner ecosystem

VALUE TO BUSINESS

A streamlined application process that drives increased sales of new cards





SOLUTION

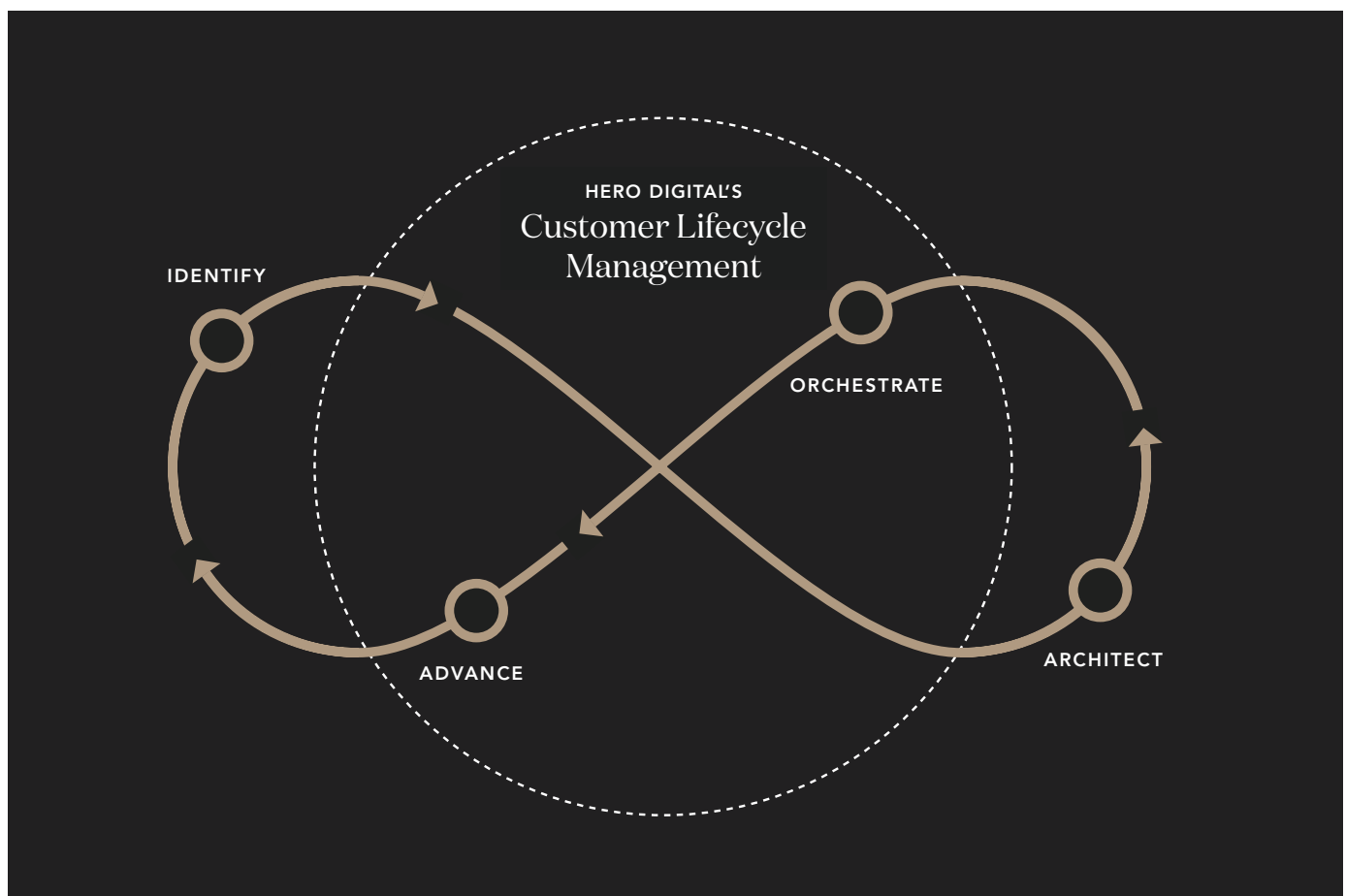
Customer Lifecycle Management

No matter where you are in your digital journey, Hero Digital's Customer Lifecycle Management solution helps you connect with people at every stage of their journey.

Create tailored digital experiences across the customer lifecycle

Empowered by technology, people are piecing together ecosystems around each human need. Loyalty comes from their own human experience.

With Hero Digital's Customer Lifecycle Management, we work with our clients to understand the complex ecosystem that exists around their customers' needs and seize opportunities to create value for people and business.



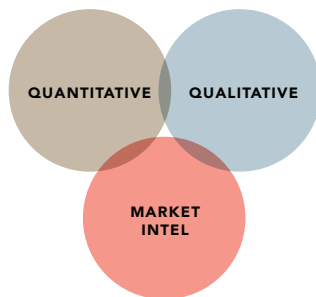
Four phases of Customer Lifecycle Management



PHASE 1

Identify

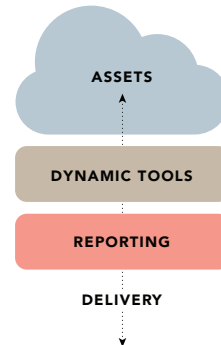
Define target customer microsegments and journeys.



PHASE 3

Orchestrate

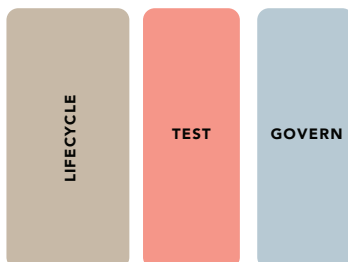
Deploy tailored content with precision messaging across multiple channels.



PHASE 2

Architect

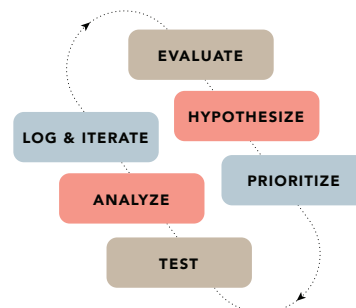
Create a content architecture, data strategy, and testing plan.



PHASE 4

Advance

Optimize with iterative test-and-learn strategies.



Building blocks to maximize your value

Hero Digital creates **HUMAN SYSTEMS**—a connected suite of innovative, seamless experiences, powered with technology and data to serve human needs and ignite business growth.



Define

Use data to define the ecosystem surrounding people's lives.



Design








Leverage insights to design creative and innovative experiences.



Deploy

Deploy a cohesive CX technology stack to bring the human system to life.

FULLY SUPPORTED AND OPTIMIZED WITH OUR PREMIER TECHNOLOGY PARTNERS

	 commercetools	 Google Partner	 CONTENTSTACK
 Optimizely		 SITECORE	ORACLE



Get a jump on personalization

Hero works with you to streamline a customer lifecycle management strategy by incorporating assets you've already completed as key inputs. Use the list below to assess the personalization assets you have already and hone in on which capabilities to begin tackling first.

TO GET STARTED, CHECK OFF THE TESTING PROGRAM ELEMENTS YOU ALREADY HAVE AND HONE IN ON THOSE YOU'LL NEED TO TACKLE FIRST.

Which do you have?

- ☐ Microsegment Definitions
- ☐ Customer Personas
- ☐ Human Journey Map
- ☐ Customer Engagement Strategy
- ☐ Lifecycle Blueprint
- ☐ Messaging Architecture
- ☐ Technology Configuration
- ☐ Governance Model
- ☐ Creative Asset Repository
- ☐ Dynamic Content Tools
- ☐ A/B and Multivariate Testing
- ☐ Data Insight Reports



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