

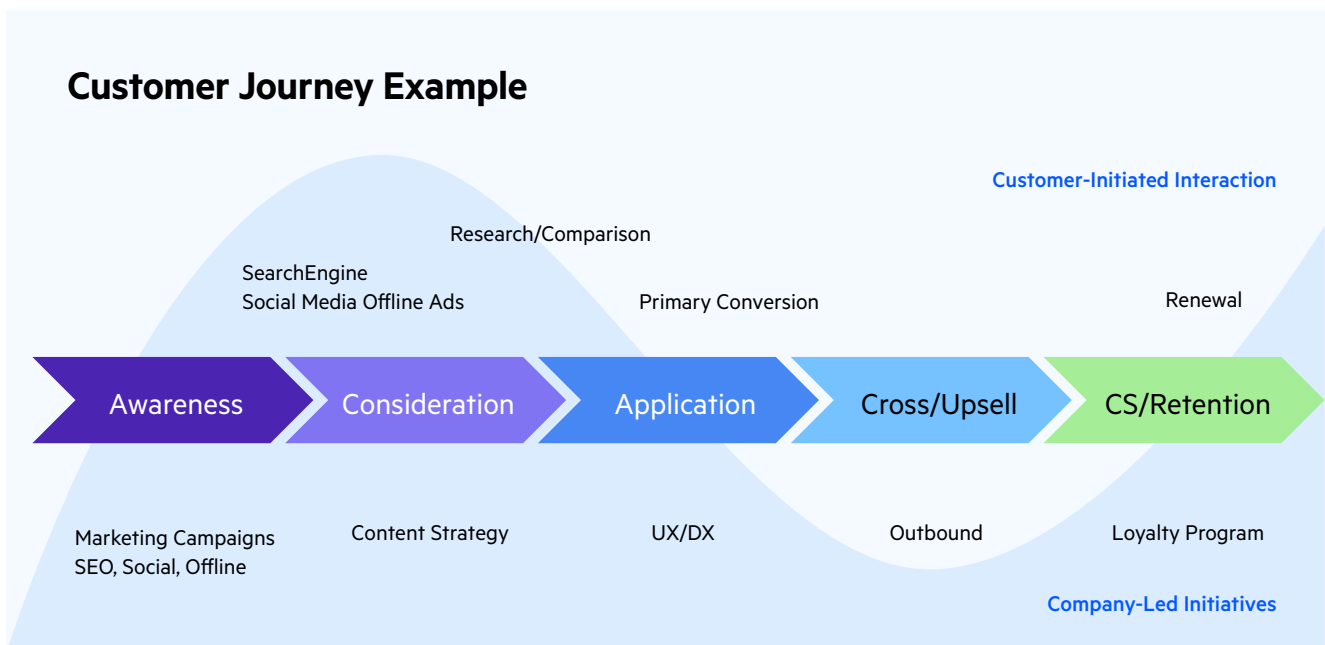
Deliver Engaging Content

Personalization with Progress® Sitefinity®

Build Lasting Connections with Your Audience

Personalization helps businesses reach the right audience at the right time and bring relevant content, services and products to the foreground. Using data insights, information about customer preferences and their previous interactions, businesses can define audience segments and activate specific communication channels such as websites or email to create positive emotions and remove friction before it happens.

Customer Journey Example



How to Choose the Right Personalization Strategy

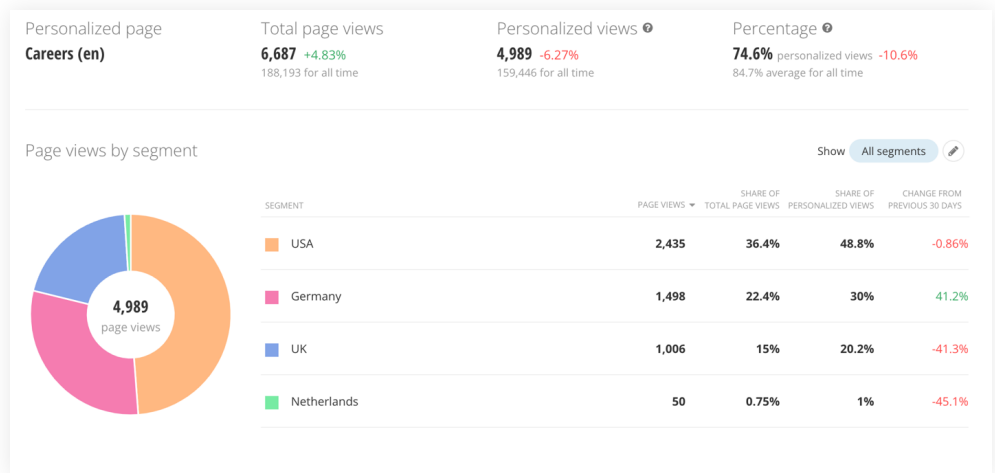
Consumer habits are changing, prompting businesses to rethink their strategy and shift their focus toward delivering tailored customer experiences that increase engagement and loyalty.

Choose your personalization strategy based on your business model, available customer data and specific goals:

- Use **visitors' browsing behavior** to determine what content they will see, depending on the pages they see, emails they read and products they look at.
- **Proactively deliver content** based on similarities with other users that have completed a conversion goal (e.g., registered for an event, contacted sales).
- Use the known **user and customer profile data** to determine what content they will see (e.g., who they are, where they are from and what products and services they have previously bought).

How to Get Started with Personalization

The myriad data sources and available channels for personalization can easily overwhelm even seasoned marketers. Identifying the low hanging fruit and working with other teams across the organization to create a roadmap to incrementally introduce personalization across the entire customer journey will help you align your needs with the business goals, taking into account the complexity of your tech stack and competing cross-team priorities.



Personalization involves tailoring content and experiences to individual users based on their preferences, behaviors, demographics and historical interactions to enhance engagement and satisfaction. Key concepts that can help you navigate and understand the customer journey include:

Persona	Segment	Touchpoint	Conversion	Attribution
A persona is a fictional character representing a user type that might use a site, brand or product in a similar way.	An audience segment is a specific group of consumers targeted on shared characteristics or behaviors.	A touchpoint is any interaction or point of contact between a brand and its customers.	A conversion is when a user completes a desired action, such as a purchase or signup.	Attribution in marketing identifies which tactics influence consumers to make a purchase or take action.

Embrace Personalization. One Step at a Time.

- Define 3-5 personas based on the ideal website journeys or desired outcome. Personas represent a group of similar people in your target audience (e.g. interested in home loans, credit cards or auto loans).
- Identify and personalize 1 or more key pages or touchpoints (homepage, key category pages) with content tailored to the needs of your personas. Keep content and links that are irrelevant to your audience to a minimum. Too much personalization can drive your audience away.
- Plan to integrate 2-3 data sources (website, CRM, email automation) that can provide more information about your audience. Use Sitefinity Integration Hub to easily connect 1000+ business apps.
- Identify underperforming channels (website, customer portal, email) or individual touchpoints (contact us page, homepage, key campaign pages) that can create friction. Use analytics software or the Progress Sitefinity Insight Content Attribution models and conversion uplift reports.
- Run weekly performance reports, plan for monthly content updates and review your strategy each quarter.

Three Ideas for Website Personalization

Personalize based on traffic source

Increase engagement by personalizing key pages based on where your audience came from—social, email, paid advertising or a specific geolocation. Reduce bounce rates, improve scroll rates and increase time spent on the site, among other KPIs.

Personalize based on persona

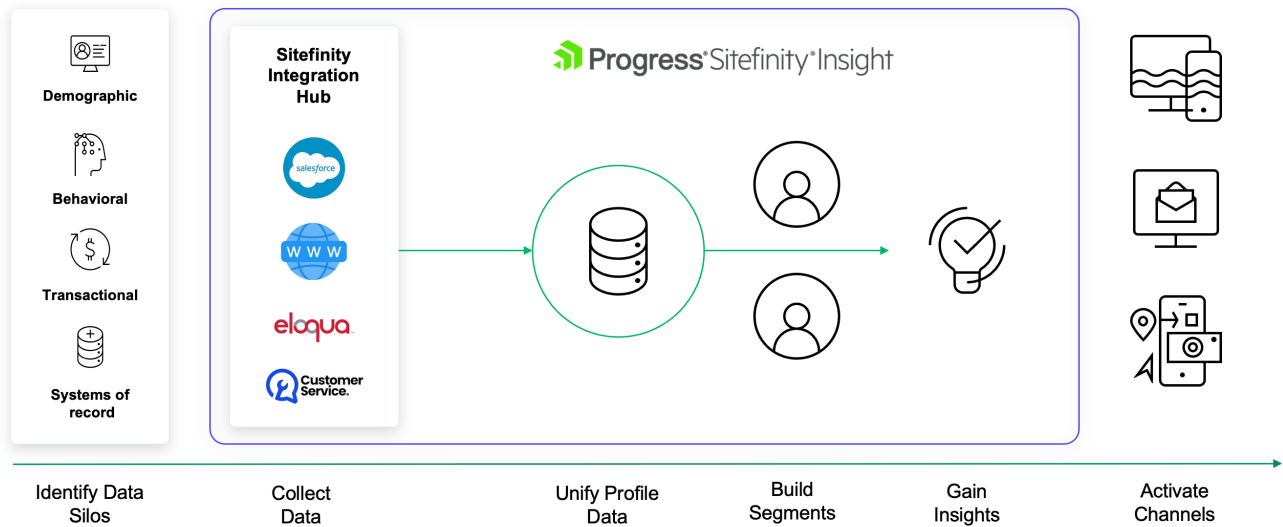
Improve conversion rates and cross-sell success rates by personalizing the customer journey, promoting relevant content, related products and services to your audience, based on their needs and interests.

Personalize based on lead scoring

Improve sales funnel effectiveness by proactively delivering relevant content to contacts who have passed a specific lead threshold (e.g. filled a form, became a contact, looked up for a local distributor or branch).

Sitefinity Insight CDP

Progress®Sitefinity Insight® delivers powerful Customer Data Platform Capabilities (CDP) enabling you to capture and manage customer data, map the customer journey, deliver 1:1 personalization and promote relevant content, track interactions, measure audience performance and more.



Available Personalization Capabilities

- **Personalization Based on Geo and Traffic Source**

Tailor user experiences by leveraging geo-location, device type and UTM parameters to provide targeted content, enhance relevance and drive higher engagement.

- **Real-time personalization based on persona segments**

Personalize the customer journey based on a predefined customer segment.

- **Real-time personalization based on lead scoring**

Customize the customer journey based on a visitor's engagement and readiness to convert.

- **Segment targeting by conversion**

Optimize the customer journey and increase engagement by promoting relevant content, products or services based on macro or micro conversions.

- **Segment targeting by touchpoint**

Personalize the journey to include specific pages based on the initial touchpoint or campaign source.

- **Contact list / segment export (with criteria)**

Export contact information to facilitate segmentation and targeting in third party MarTech systems.

- **AI-driven Content Recommender**

The data-driven algorithm automatically identifies and promotes content to produce the next best step (a recommendation) for the current visitor's journey.

- **Personalization Reports**

Gain a comprehensive analysis and insights into various personalized content variations, refining strategies and maximizing user engagement.



[Learn More](#)






About Progress

Progress (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and experiences with agility and ease. Customers get a trusted provider in Progress, with the products, expertise and vision they need to succeed. Over 4 million developers and technologists at hundreds of thousands of enterprises depend on Progress. Learn more at www.progress.com

© 2024 Progress Software Corporation and/or its subsidiaries or affiliates.
All rights reserved. Rev 2024/09 | RITM0257102

Worldwide Headquarters

Progress Software Corporation
15 Wayside Rd, Suite 400, Burlington, MA 01803, USA
Tel: +1-800-477-6473

 facebook.com/progresssw
 twitter.com/progresssw
 youtube.com/progresssw
 [/progress-software](https://in.linkedin.com/company/progress-software)
 [progress_sw_](https://www.instagram.com/progress_sw_)