

THE POWER OF PERSONALIZATION

TIPS AND TRICKS FOR DRIVING MEMBER PARTICIPATION AND RETENTION

READY
N O R T H

 **aiim**

Meet Your Presenters



Allison Kral
Senior Marketing Consultant
Ready North



Tony Paille
Former Chief Marketing Officer
AIIM



Table of Contents

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIMM's Success Stories

05

Q/A



First Up

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIMM's Success Stories

05

Q/A



How do you experience personalization in your everyday life?



Personalization

noun, plural "personalizations"

- The action of designing or producing something to **meet someone's individual requirements**.
- The act of **tailoring an experience or communication** based on information a company has learned about an individual.
- Gaining insights into member preferences and intent through data, so you can offer them **tailored experiences**.



Are you using personalization in your marketing efforts?



PERSONALIZATION

Why personalize?



Build prospect connections.



PERSONALIZATION

Why personalize?



Build prospect connections.



Deliver targeted messages.



PERSONALIZATION

Why personalize?



Build prospect connections.



Deliver targeted messages.



Increase member loyalty and retention.



PERSONALIZATION

Why personalize?



Build prospect connections.



Deliver targeted messages.



Increase member loyalty and retention.



Boost revenue.



Next Up

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIMM's Success Stories

05

Q/A



Baby, It's Fact.

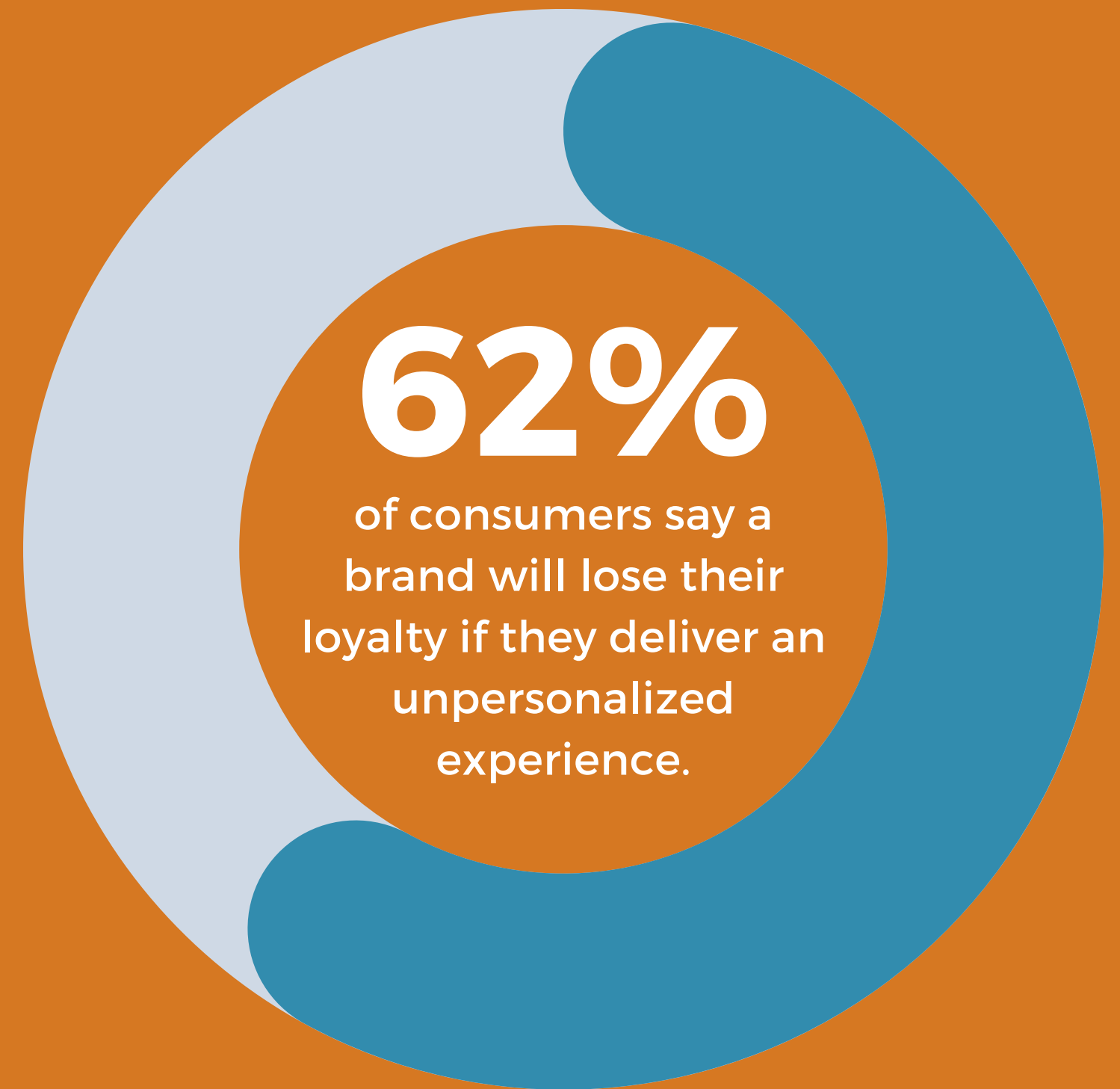
The benefits of personalization are unparalleled and can include:

- Enhanced member experiences.
- Increased engagement and conversions.
- Improved member retention.
- Enhanced relevance and context.
- Higher member satisfaction.
- Increased marketing ROI.
- A competitive advantage.



PERSONALIZATION IS THE FUTURE.

- Nearly **69% of business leaders** are increasing their investment in personalization.
- More than **9 in 10 businesses (92%)** are using AI-driven personalization to drive growth in their business.
- Organizations are undoubtedly recognizing the value of personalization.



Source: [Twilio](#)





PERSONALIZATION

Challenges For Associations



Limited member engagement.



Challenges & Causes



**Limited member
engagement.**

- ➔ **Email fatigue.**
- ➔ **Unrelated, irrelevant content.**
- ➔ **Lack of value proposition.**



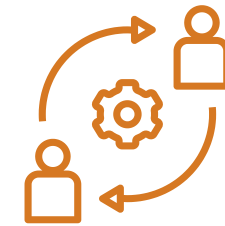


PERSONALIZATION

Challenges For Associations

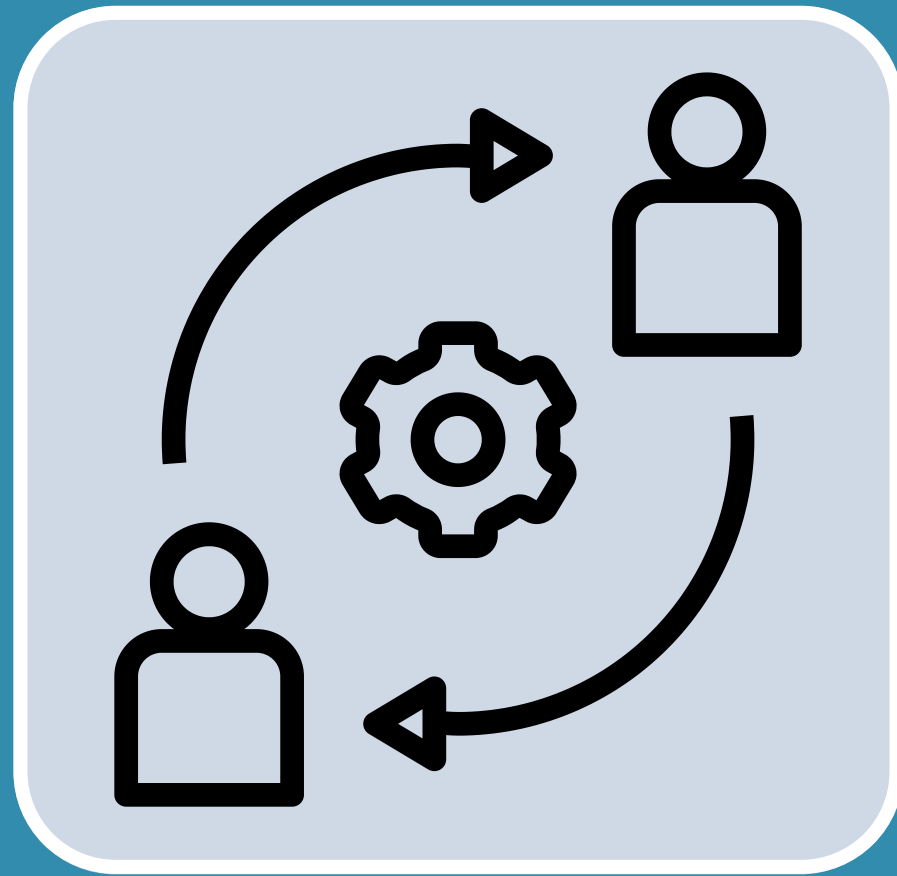


Limited member engagement.



Changing member needs.

Challenges & Causes



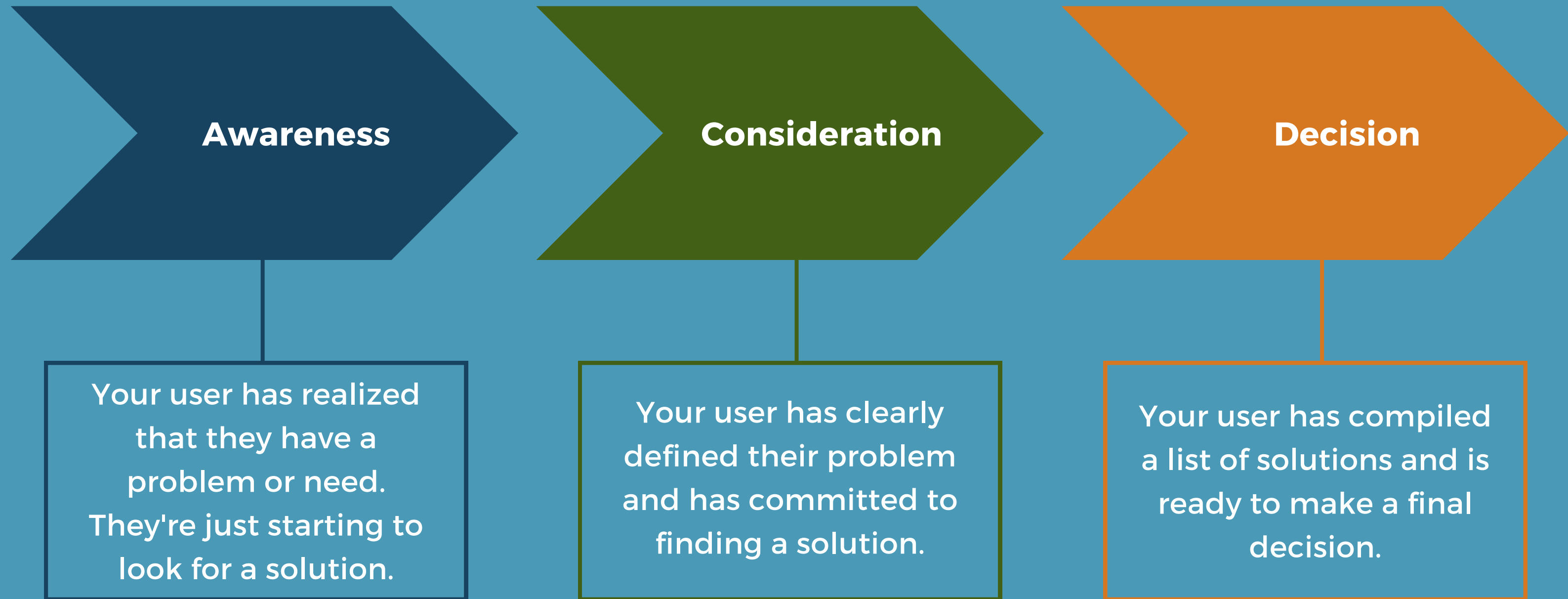
**Changing member
needs.**

- ➡ Ignoring the user's journey.
- ➡ Inability to address pain points.
- ➡ Failure to adapt.



Understand Your User's Journey

Learn more here >>>



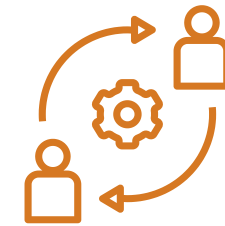


PERSONALIZATION

Challenges For Associations



Limited member engagement.



Changing member needs.



Lack of personalization.

Challenges & Causes



**Lack of
personalization.**

- ➔ Little data use and understanding.
- ➔ Fragmented data sources.
- ➔ Insufficient technology use.



Learn about GA4 here >>>

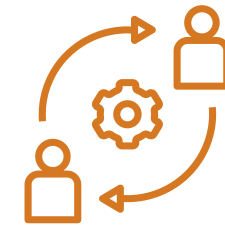


PERSONALIZATION

Challenges For Associations



Limited member engagement.



Changing member needs.



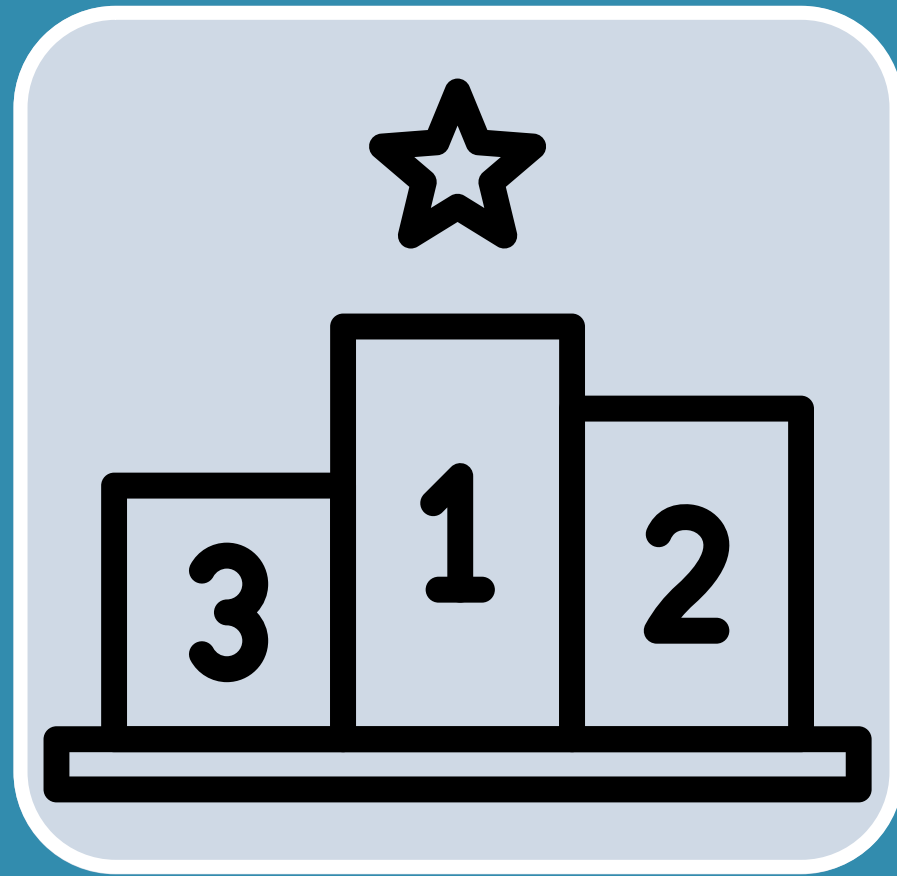
Lack of personalization.



Competition for attention.



Challenges & Causes



**Competition for
attention.**

- ➔ **Overlapping value propositions.**
- ➔ **Limited internal resources.**
- ➔ **Outdated member resources.**



Next Up

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIMM's Success Stories

05

Q/A



Top Tips, Tools, and Tricks for Personalization



DATA-DRIVEN PERSONALIZATION IS HERE TO STAY.

- 22.5% of consumers prefer to interact with a brand's website.
- 53.6% of consumers interact more than three times with a brand before buying them.
- 32.3% of consumers choose one brand over another if the communication is unrelated to their current shopping behavior.



Source: [Accenture](#)



View & filter report

Top Blog Posts

Date range: This entire year

BLOG POST	VIEWS ↕
What Is First Principles Thinking? 3 Popular Approache...	12,220
How To Define Critical KPIs Across the Marketing Funn...	1,206
12 Questions You Should Ask Google Analytics Every M...	741
How Marketing Can Support the Sales Process	699
Your Top Google Analytics 4 Questions, Answered	648
The Comprehensive Marketing Audit: 21 Questions to G...	603
15 Tips to Improve Your Marketing Performance	522
What is Google Analytics 4 and How Does it Work?	485

PERSONALIZE OUTREACH WITH REPORTING



Content



User behaviors



Journey mapping



The background of the image shows a close-up of a document with several handwritten checkmarks inside circles. A black pen with a silver tip is resting on the right side of the document. The document has some faint, dashed lines and a small white arrow pointing upwards in the bottom left corner. A teal-colored rectangular box is overlaid on the center of the image, containing the main text.

**77% of marketing ROI comes from segmented,
targeted, and triggered campaigns.**

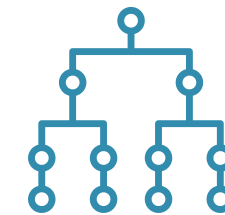
Source: [SALESmanago](#)



PERSONALIZE OUTREACH WITH **SEGMENTATION**



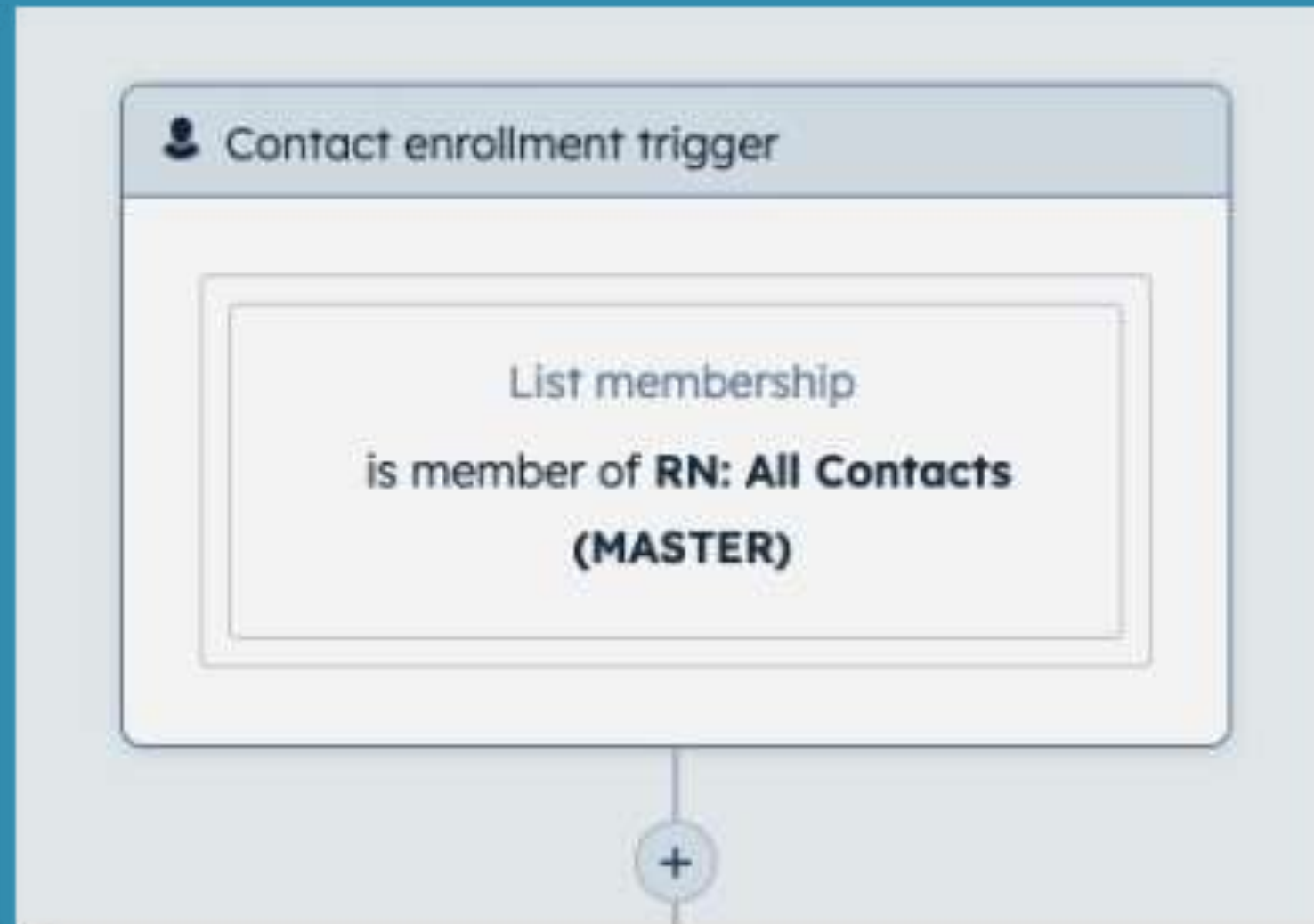
Emails



Workflows



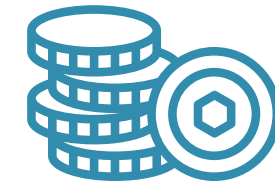
Reports





Founded in 2006, HubSpot is a developer and marketer of software products for inbound marketing, sales, and customer service.

PERSONALIZE OUTREACH WITH **HUBSPOT TOOLS**



Personalization tokens

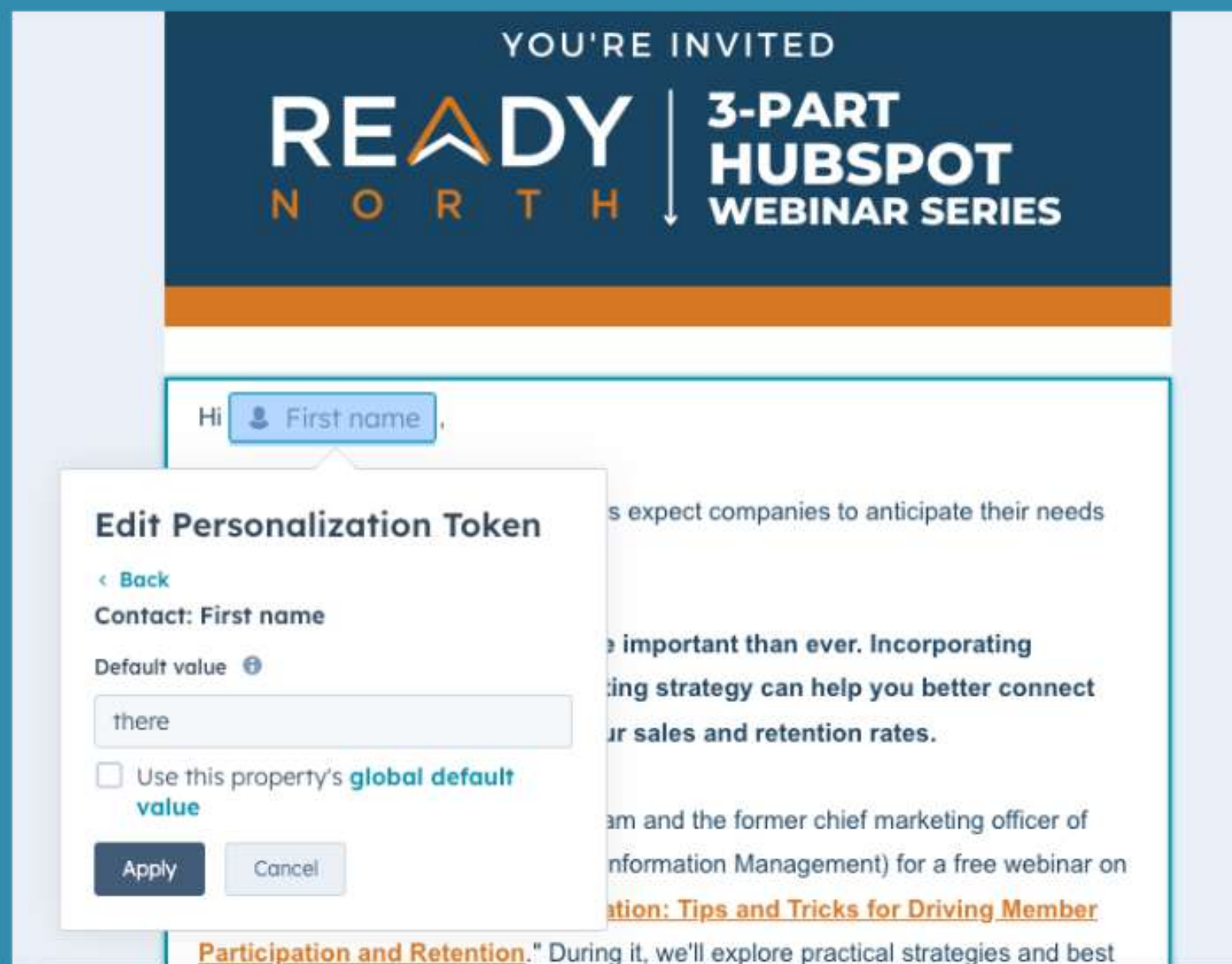


Smart content



Smart CTAs & forms

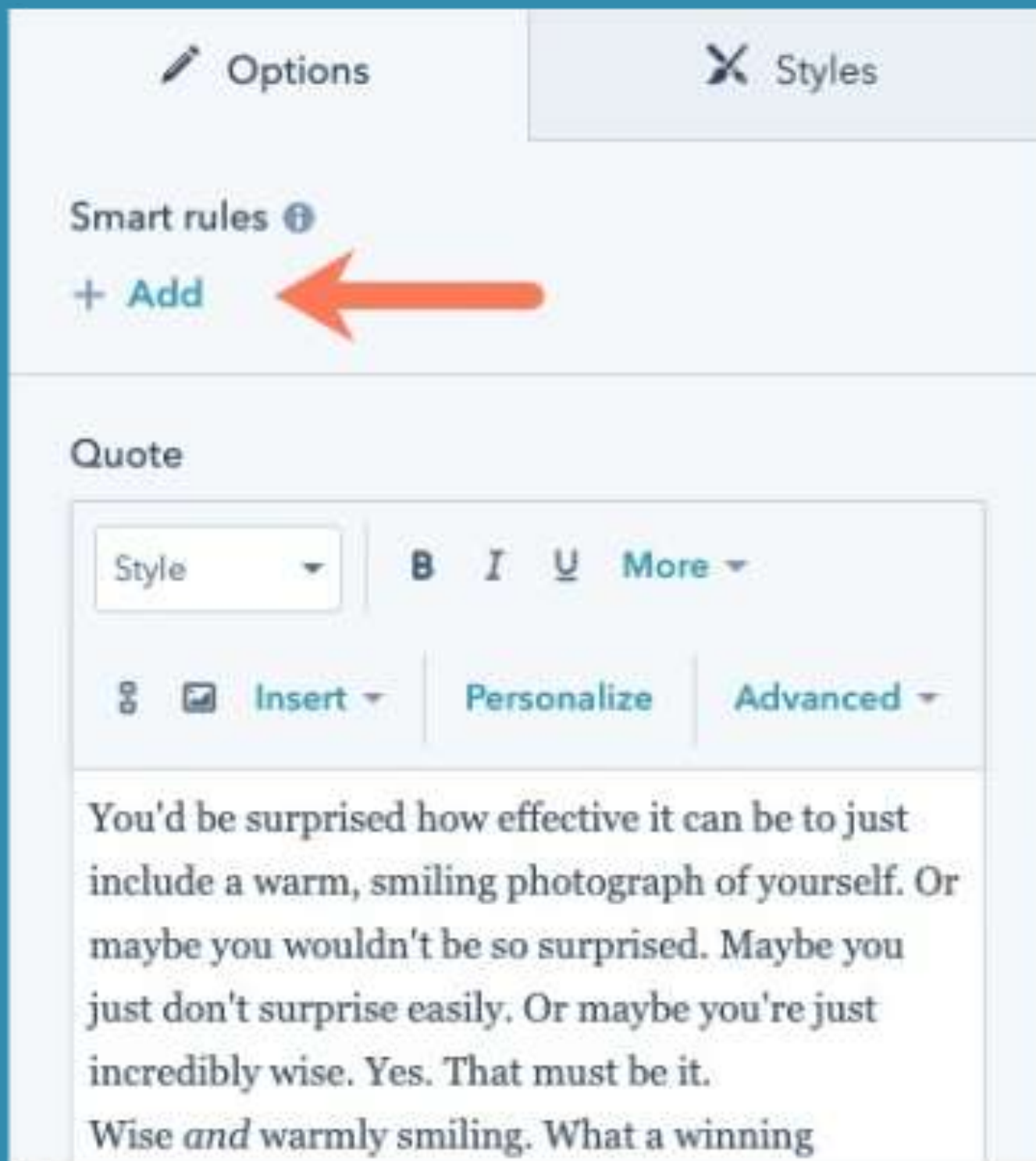




PERSONALIZE OUTREACH WITH PERSONALIZATION TOKENS

- Used on website pages, landing pages, and email.
- All content types can include personalization tokens that use a company or contact property.
- Use default tokens.
- Always test.





PERSONALIZE OUTREACH WITH **SMART CONTENT**

- Display different versions of your content based on viewer category.
- Emails, blog posts, website pages, or design manager.
- Based on categories: ad source, country, device type, referral source, preferred language, contact list membership, and lifecycle stage.
- Always preview.

Read more here >>>



PERSONALIZE OUTREACH WITH **SMART CTAS**

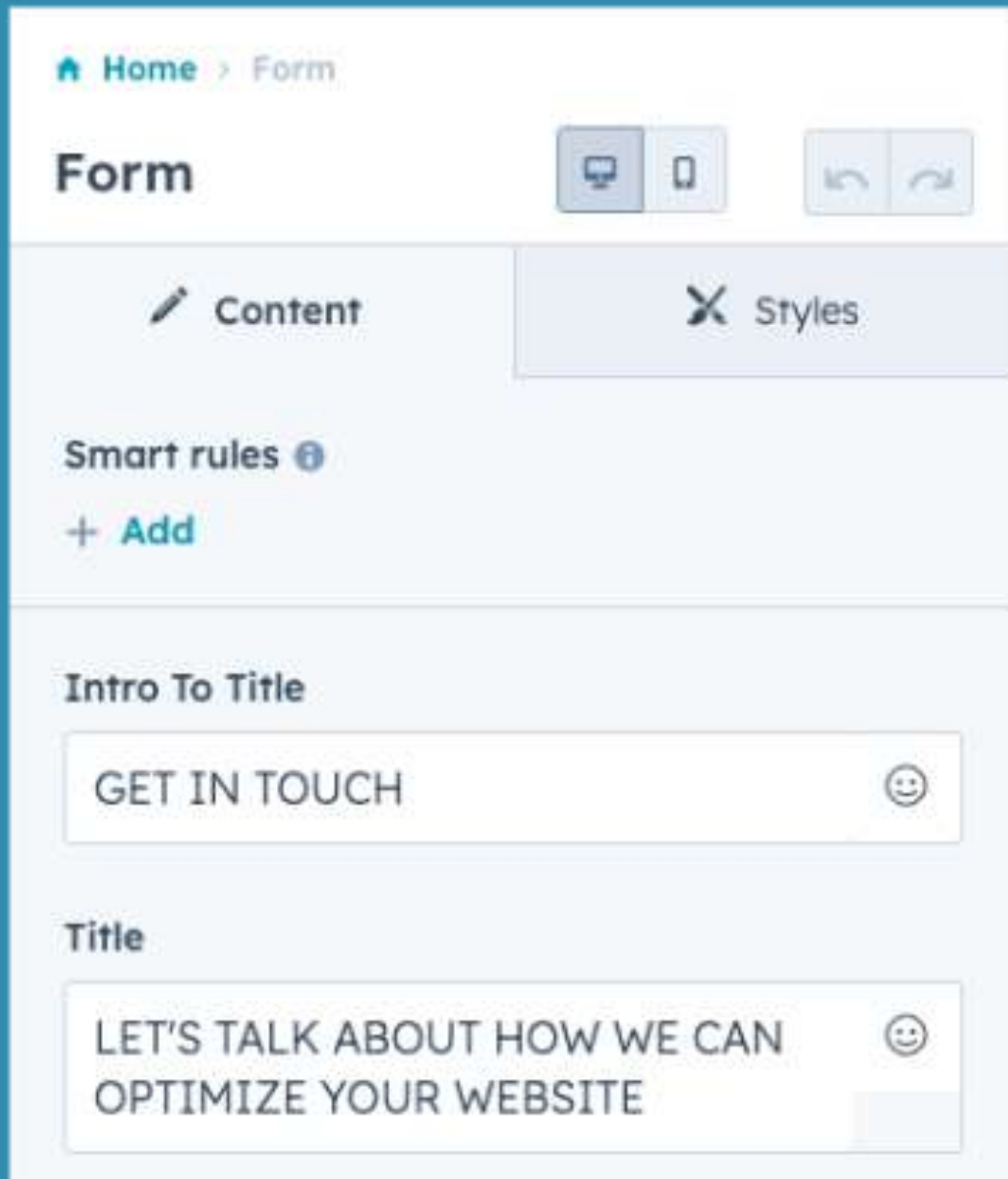
- Display a customized button to your different visitors based on certain criteria.
- Analyze performance over time.
- Based on categories: country, device type, referral source, preferred language, contact list membership, and lifecycle stage.
- Always test once published.

The screenshot shows the 'Smart CTA' configuration window. At the top, a progress bar indicates four steps: RULES (active), DESIGN, OPTIONS, and FINISH. Below the progress bar, a text box explains Step 1: 'To make a smart CTA, you create different CTAs with specific display rules. First, you need to configure these rules.' Below this, there are six radio button options for rules: 'Contact's list membership' (selected), 'Contact's lifecycle stage', 'Visitor's device type', 'Visitor's country', 'Referring source of visit', and 'Visitor's preferred language'. Below these options, a text box explains Step 2: 'Now you need to configure this rule.' Below this, there is a dropdown menu labeled 'Select one or many contact lists *' with the text 'Select a contact list' and a downward arrow. At the bottom of the window, there are two buttons: 'Cancel' and 'Next >'.



PERSONALIZE OUTREACH WITH **SMART FORMS**

- Customize the form displayed depending on your website visitor.
- Landing pages, website pages, or templates.
- Based on categories: country, device type, referral source, preferred language, contact list membership, and lifecycle stage.
- Always preview and test.



The screenshot shows a web application interface for editing forms. At the top, there is a breadcrumb trail 'Home > Form' and a title 'Form'. Below the title are two tabs: 'Content' (selected) and 'Styles'. Under the 'Content' tab, there is a section for 'Smart rules' with a '+ Add' button. Below this, there are two form preview sections. The first section is titled 'Intro To Title' and contains a text input field with the value 'GET IN TOUCH' and a smiley face icon. The second section is titled 'Title' and contains a text input field with the value 'LET'S TALK ABOUT HOW WE CAN OPTIMIZE YOUR WEBSITE' and a smiley face icon.

Next Up

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIIM's Success Stories

05

Q/A



Join mailing list -> Get all the emails

Step 1

Defining Our Lifecycle Stages

Lifecycle Stage Definitions

Lifecycle Stage Definitions

- **Subscriber** – Subscribed to the AllM blog or downloaded a how-to guide or checklist

Lifecycle Stage Definitions

- **Subscriber** – Subscribed to the AllM blog or downloaded a how-to guide or checklist
- **Lead** – Downloaded a white paper or eBook or registered for a seminar or webinar

Lifecycle Stage Definitions

- **Subscriber** – Subscribed to the AllIM blog or downloaded a how-to guide or checklist
- **Lead** – Downloaded a white paper or eBook or registered for a seminar or webinar
- **MQL** – Achieved a lead score ≥ 70

Lifecycle Stage Definitions

- **Subscriber** – Subscribed to the AIIM blog or downloaded a how-to guide or checklist
- **Lead** – Downloaded a white paper or eBook or registered for a seminar or webinar
- **MQL** – Achieved a lead score ≥ 70
- **Customer** – Purchased membership

Step 2

Mapping Our Ideal Customer Journey

Unknown Individual

Unknown Individual



Unknown Individual

```
graph TD; A[Unknown Individual] --> B[Organic]; A --> C[ ]; A --> D[ ]; A --> E[ ]
```

Organic

Unknown Individual

```
graph TD; A[Unknown Individual] --> B[Organic]; A --> C[Social Media]; A --> D[ ]; A --> E[ ]
```

Organic

Social Media

Unknown Individual

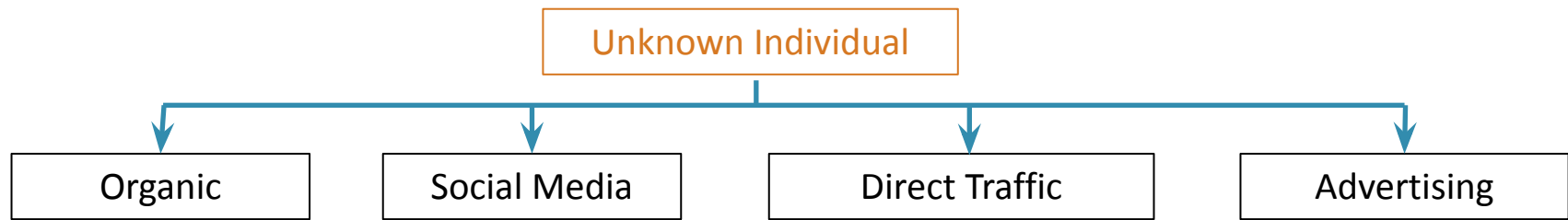
```
graph TD; A[Unknown Individual] --> B[Organic]; A --> C[Social Media]; A --> D[Direct Traffic]; A --> E[ ];
```

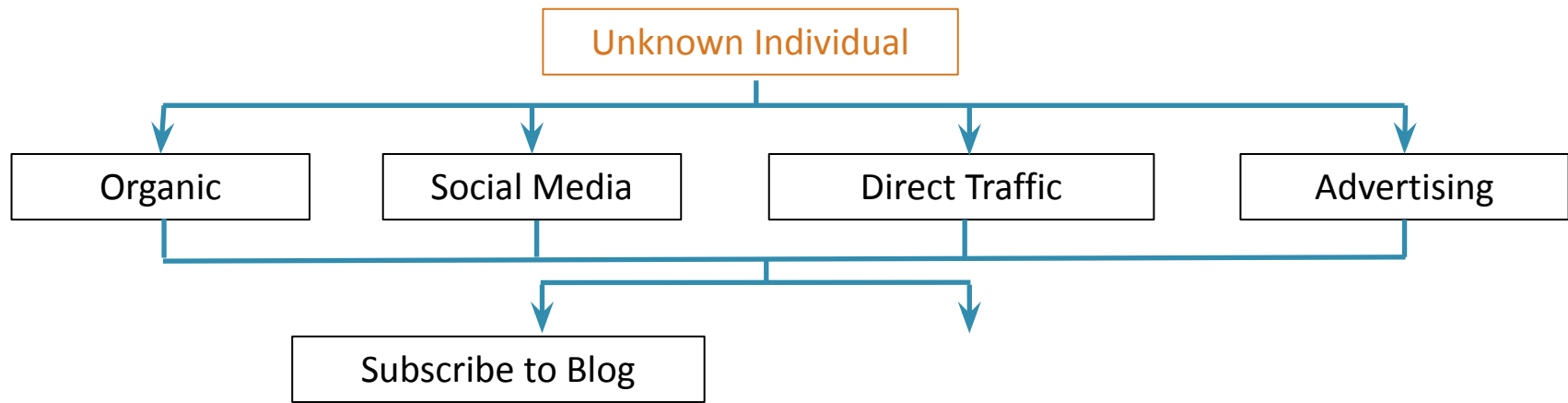
A flowchart with a top-level box labeled 'Unknown Individual' in orange. A horizontal blue line with four downward-pointing arrows branches from this box to three white boxes below: 'Organic', 'Social Media', and 'Direct Traffic'. A fourth arrow points down from the end of the horizontal line, but it does not lead to a box.

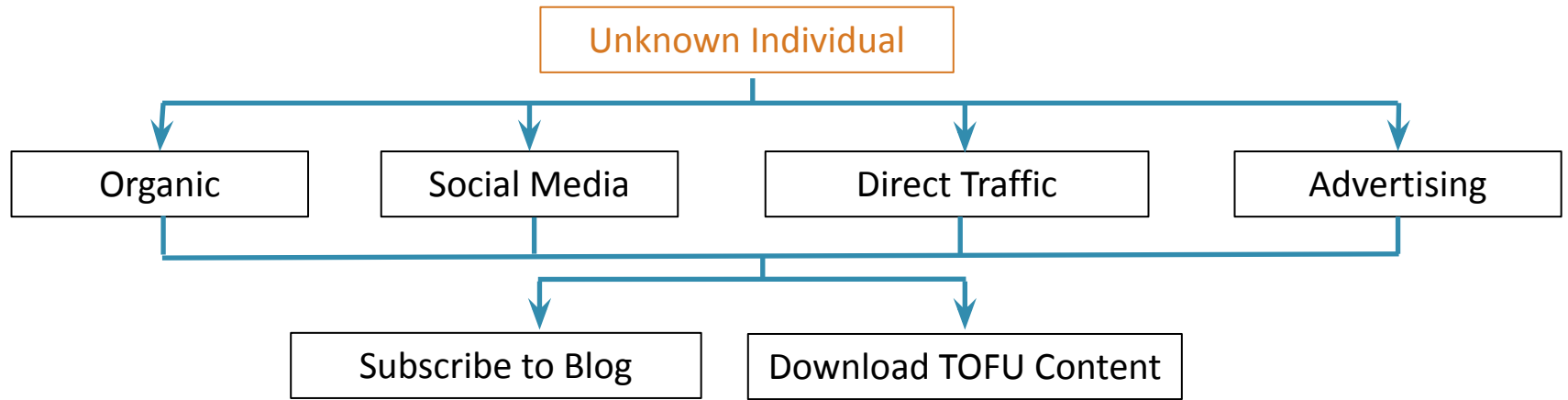
Organic

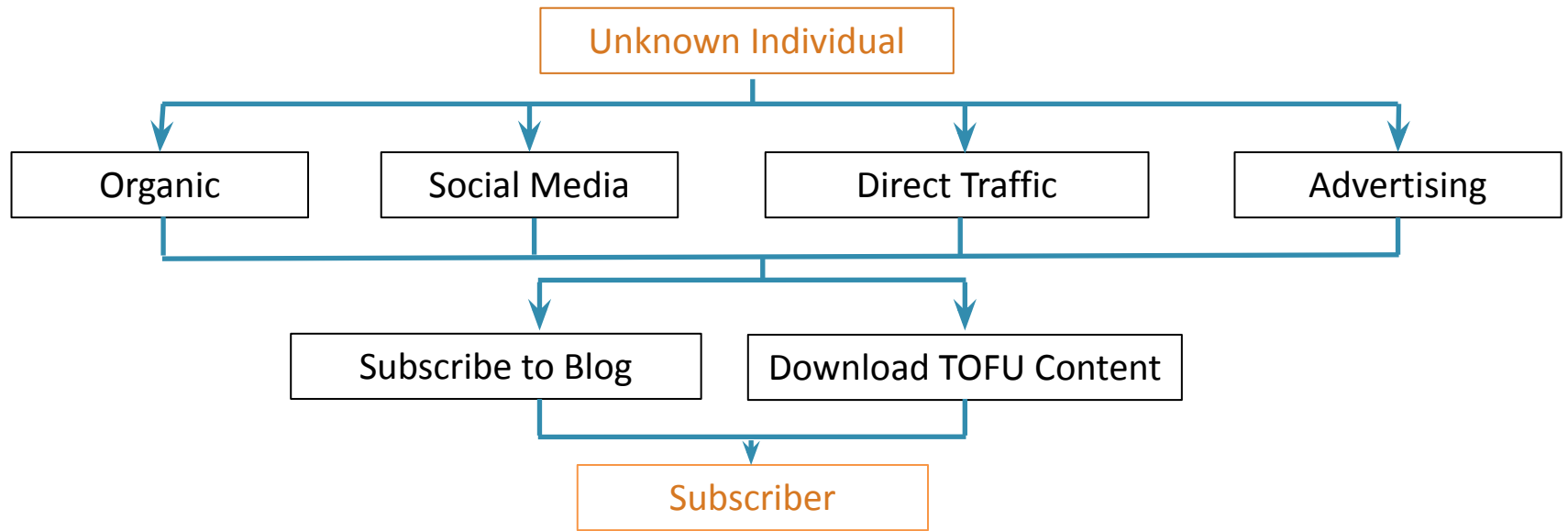
Social Media

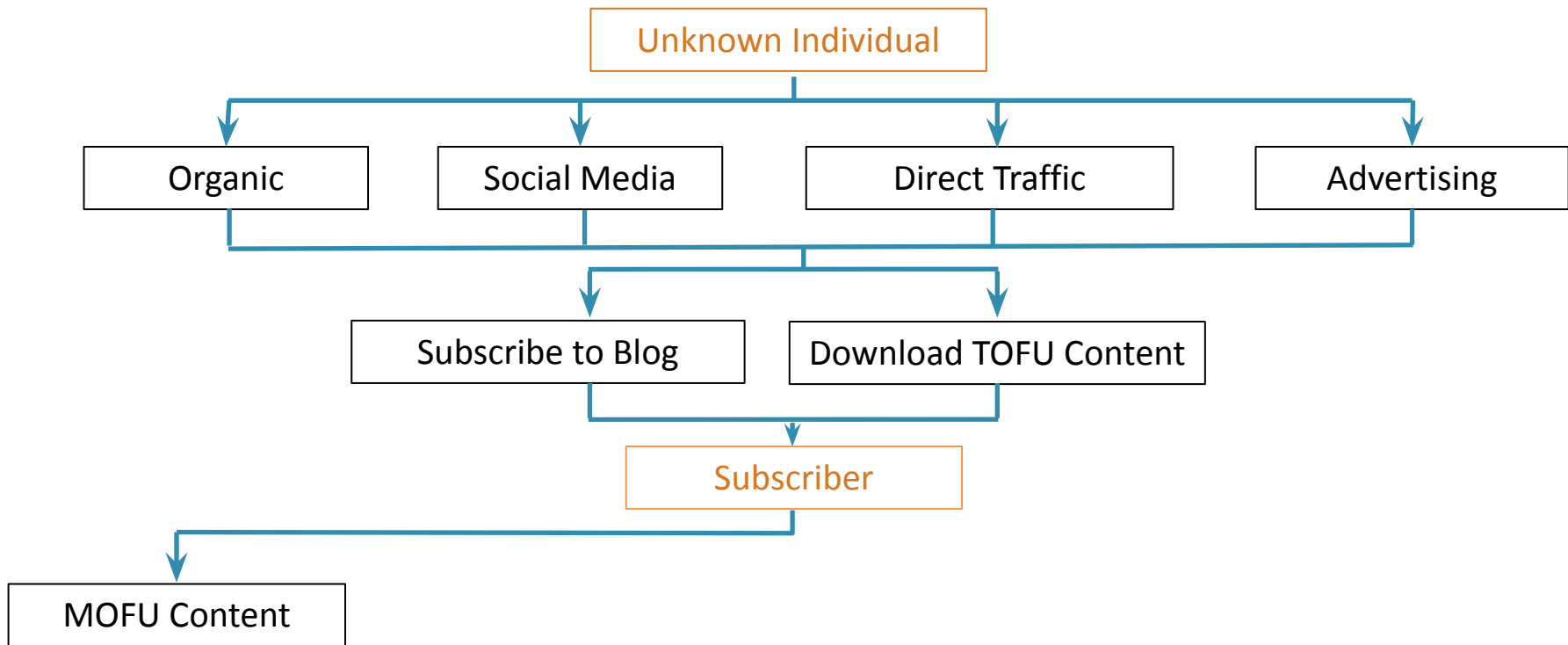
Direct Traffic

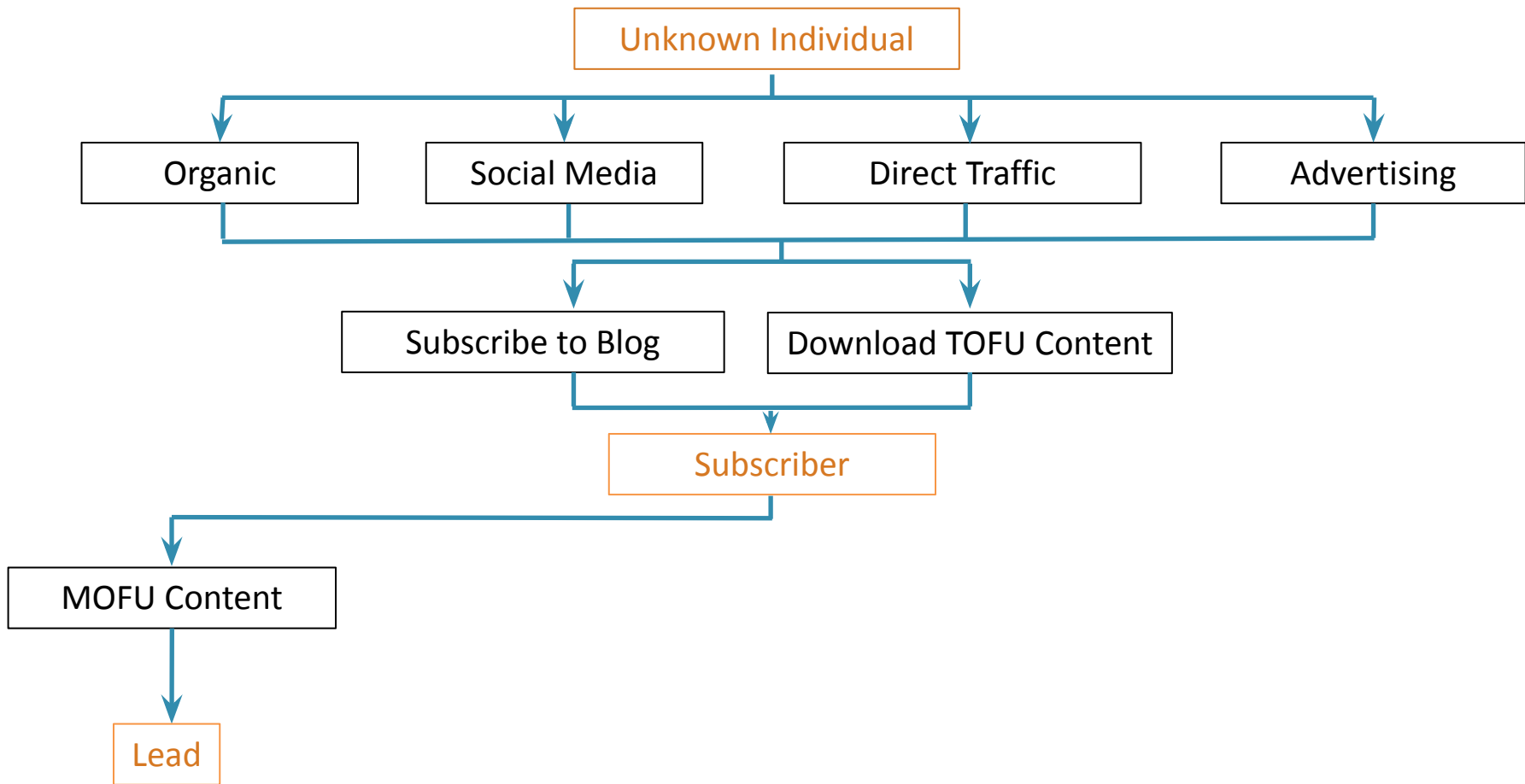


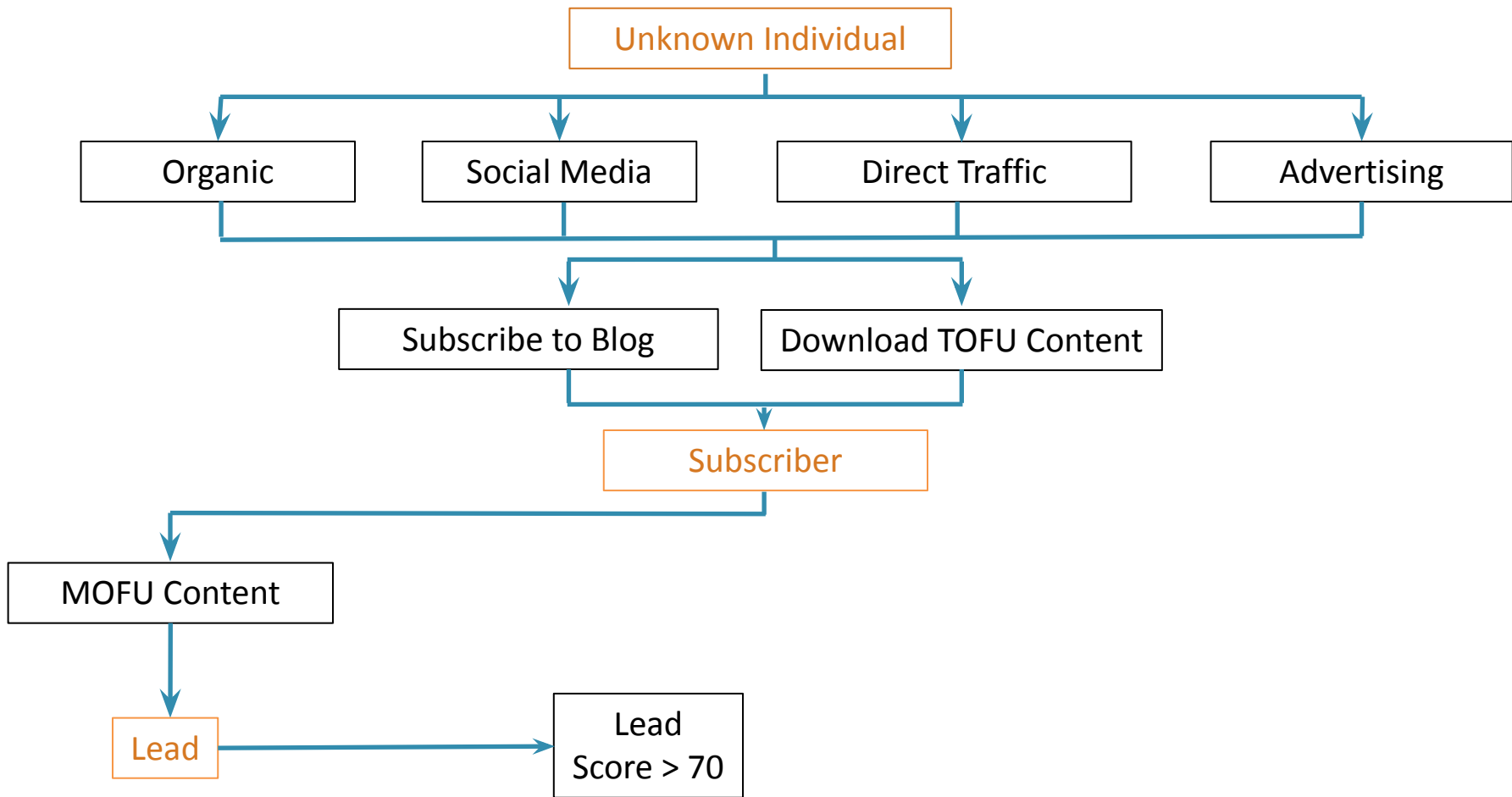


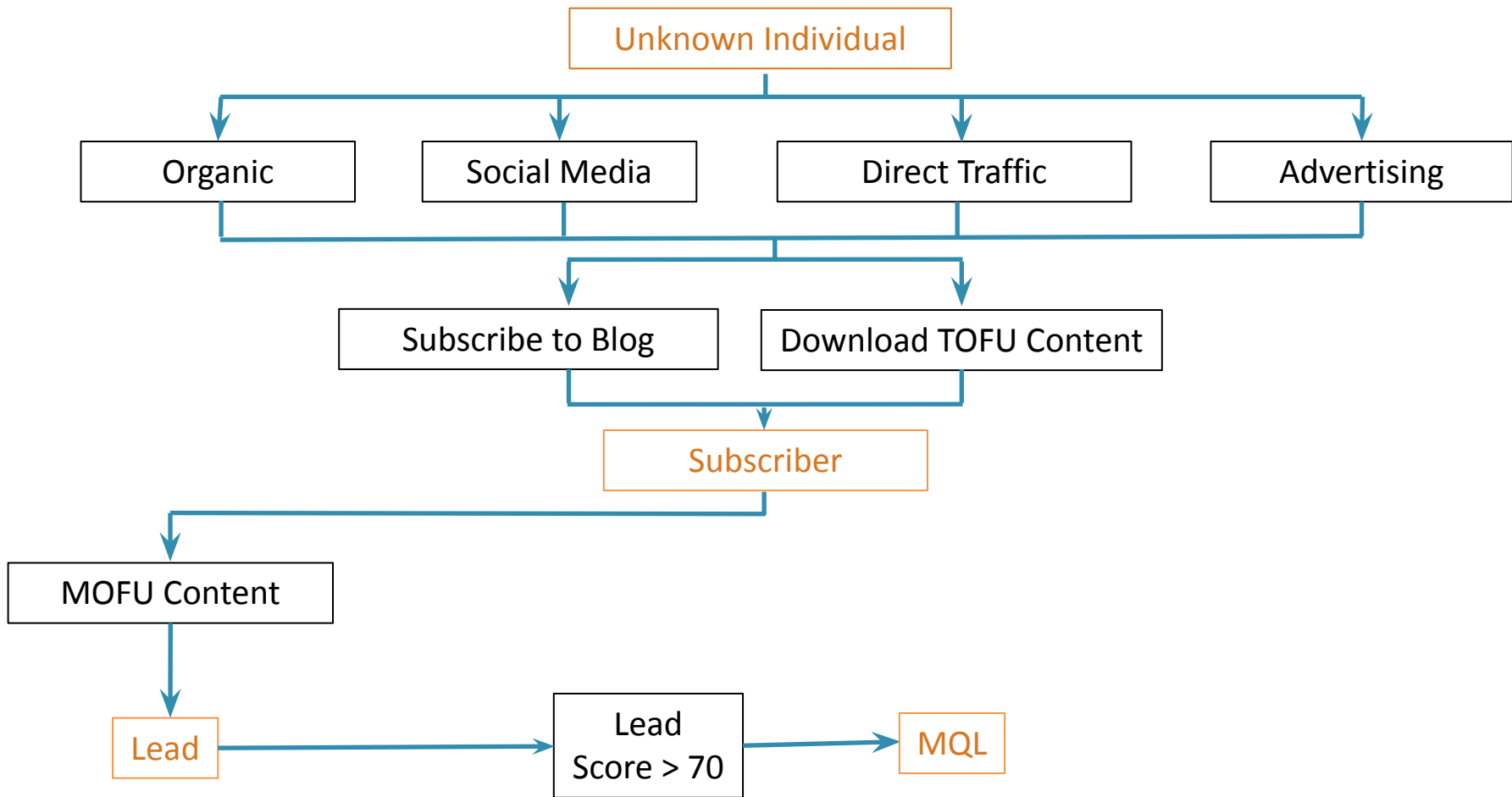


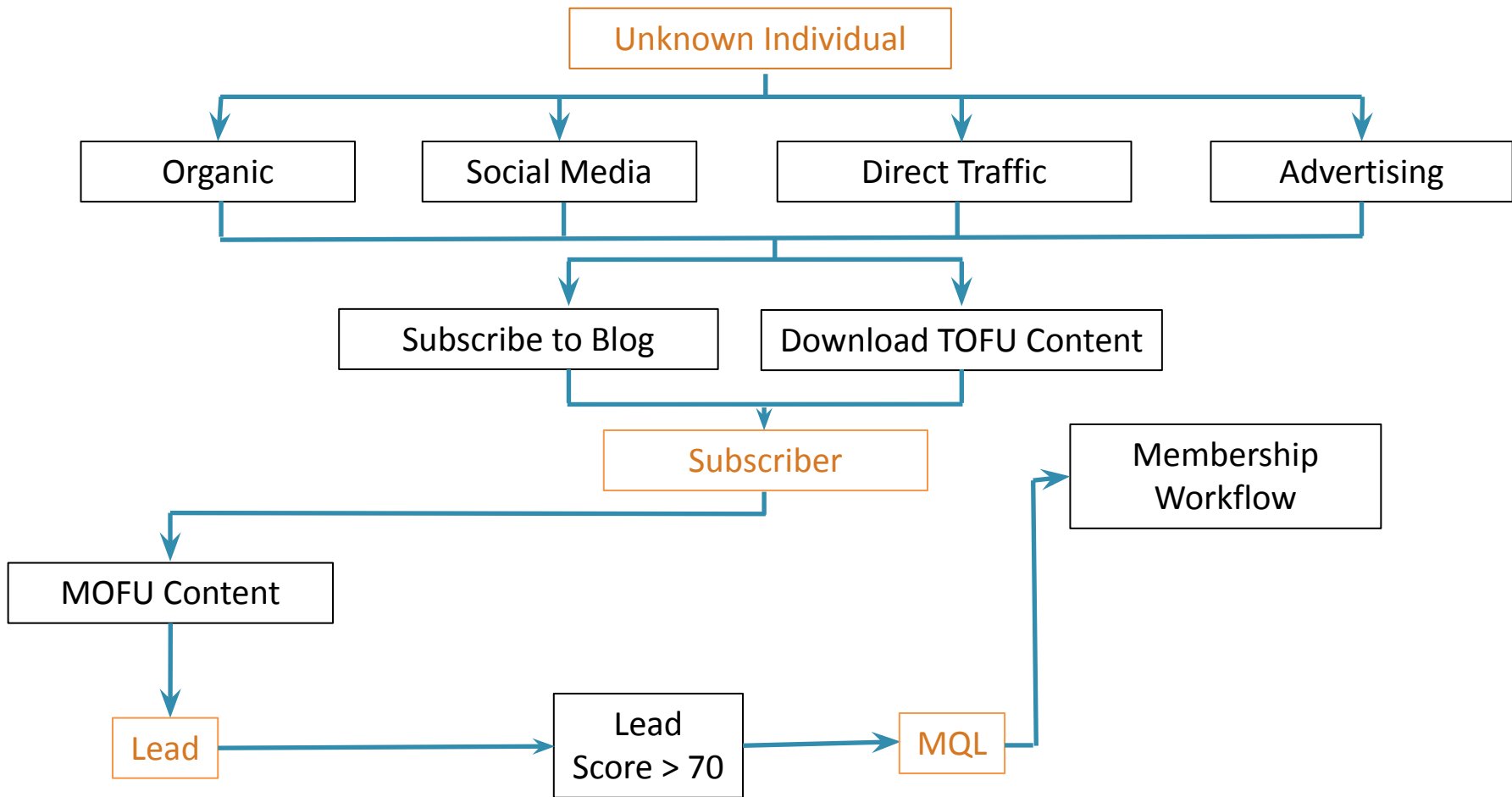


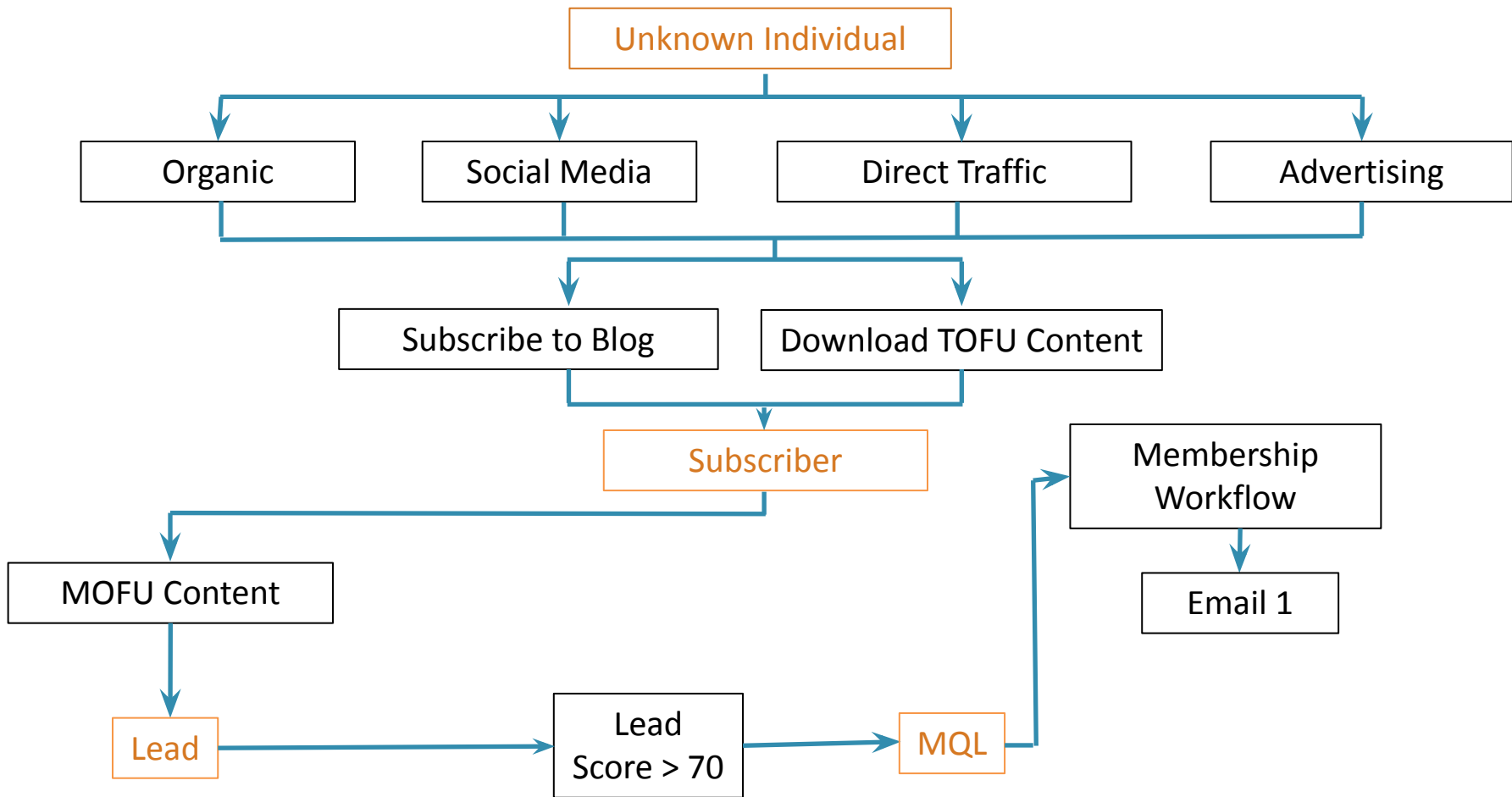


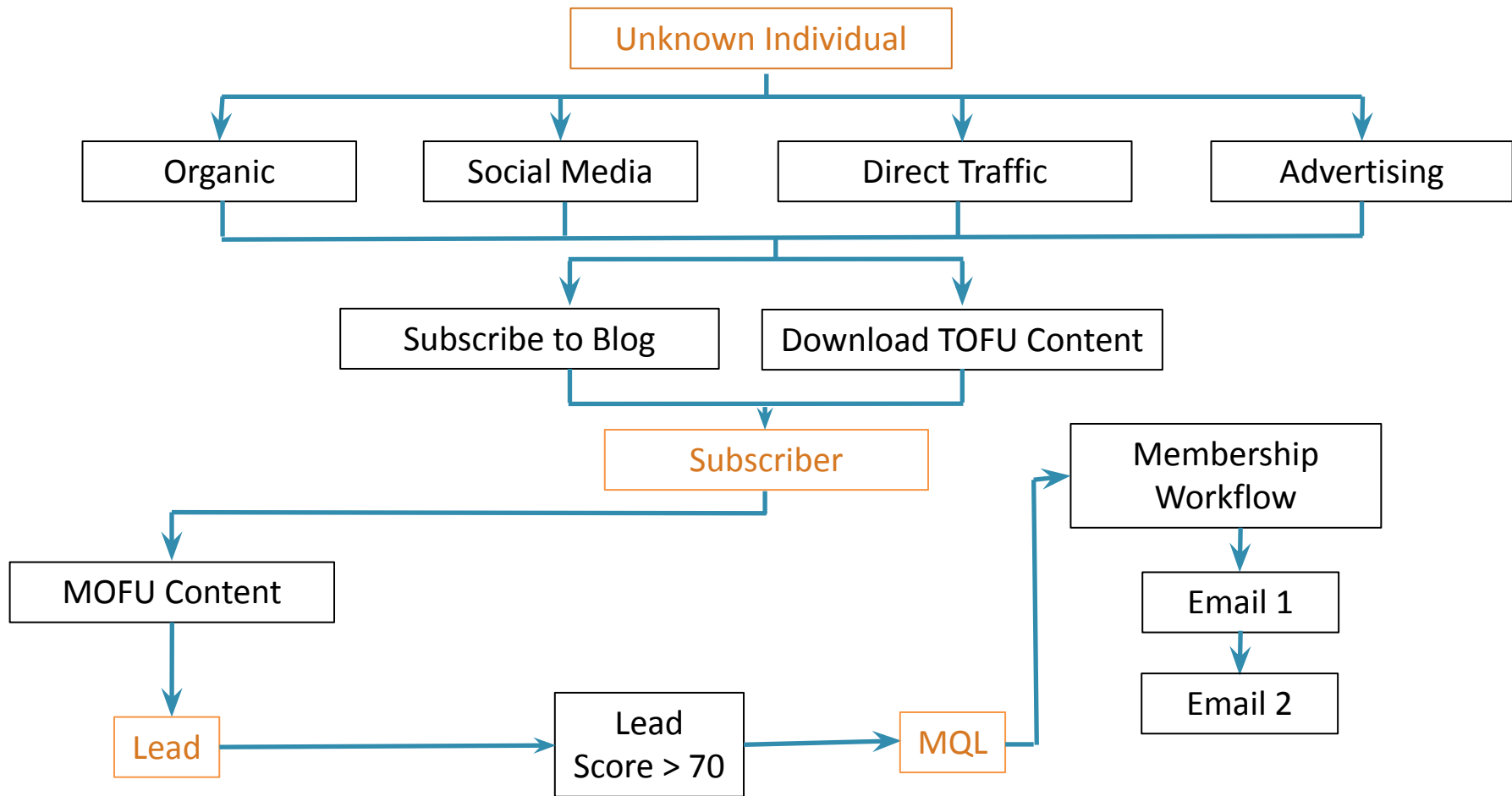


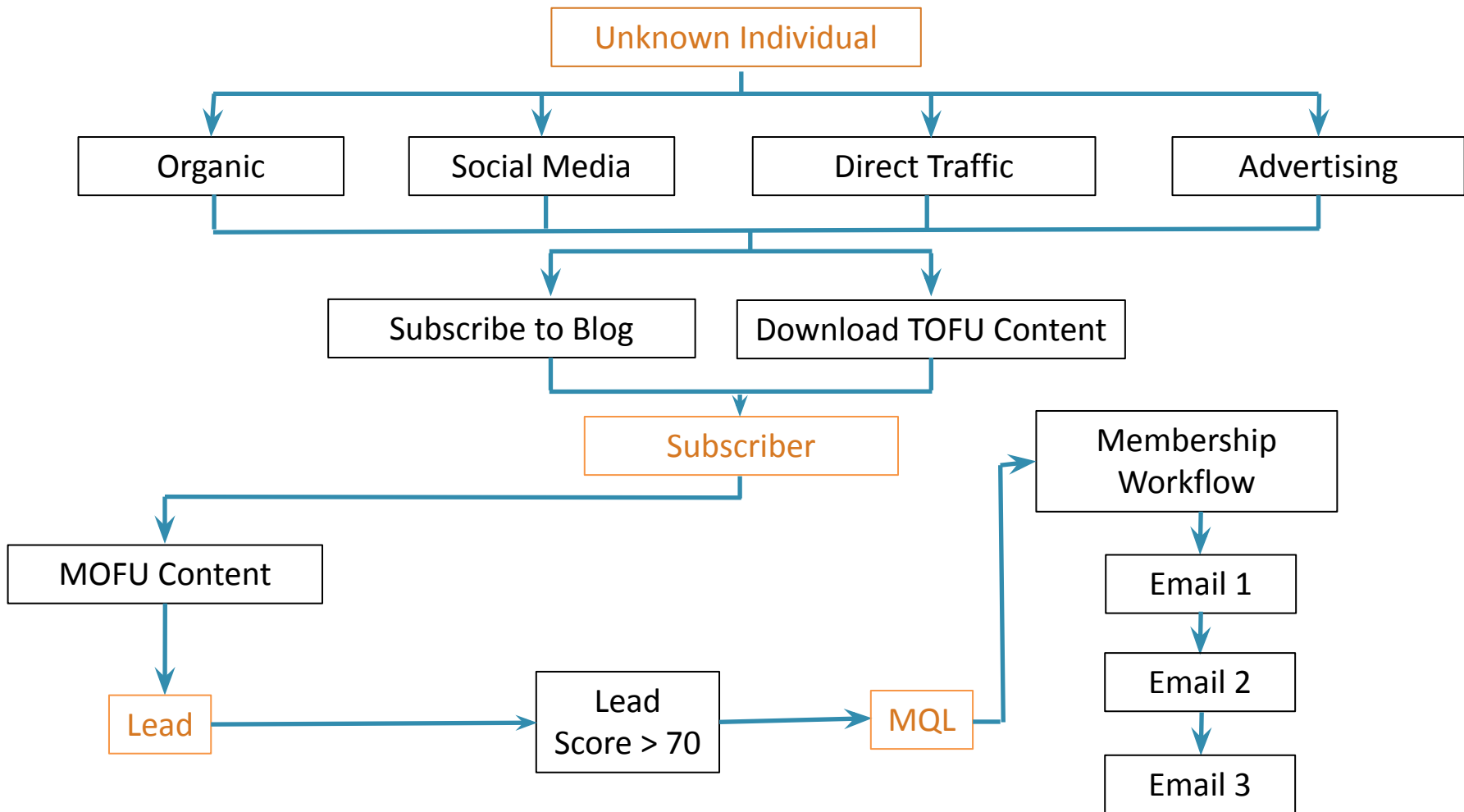


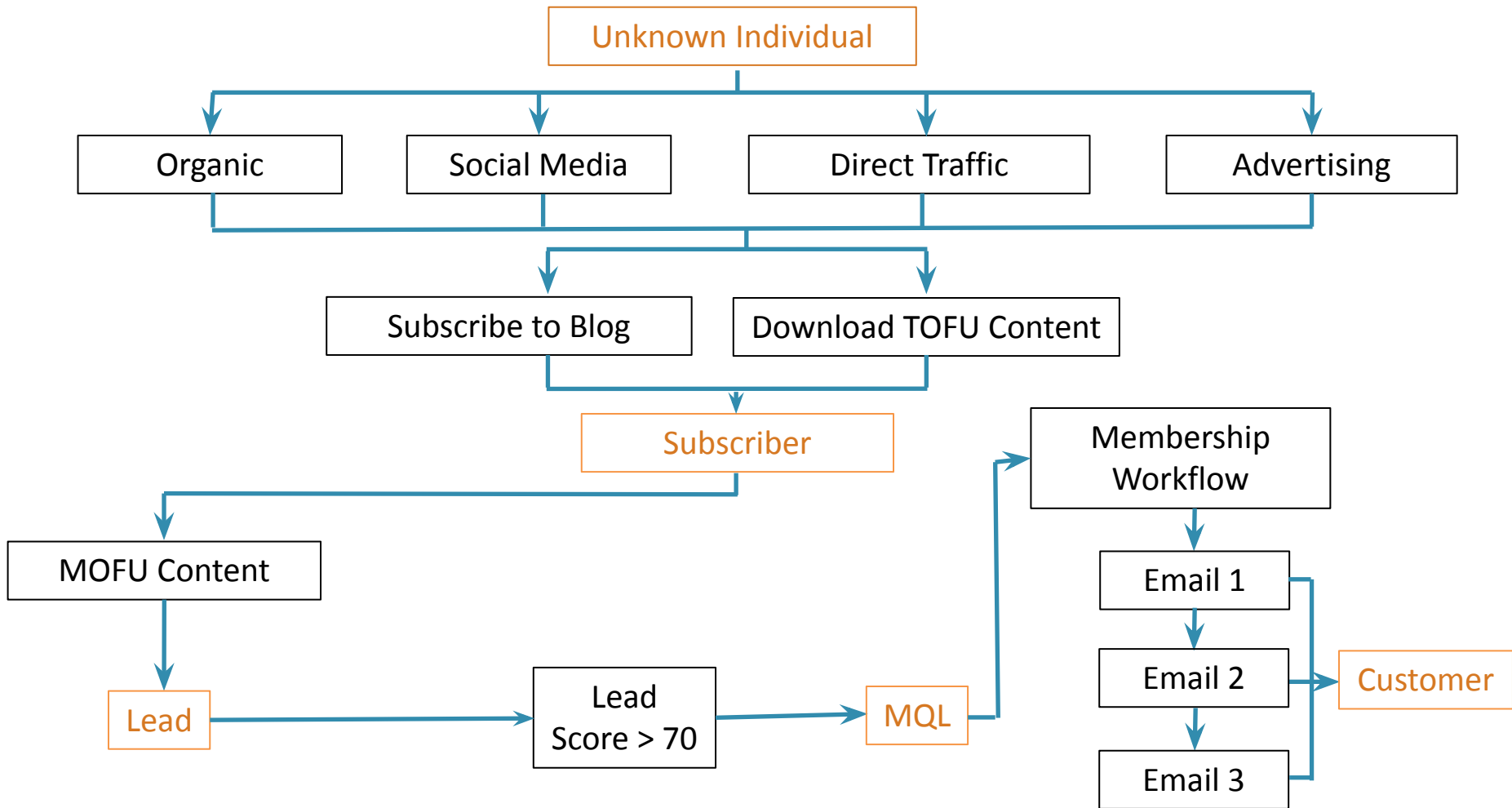


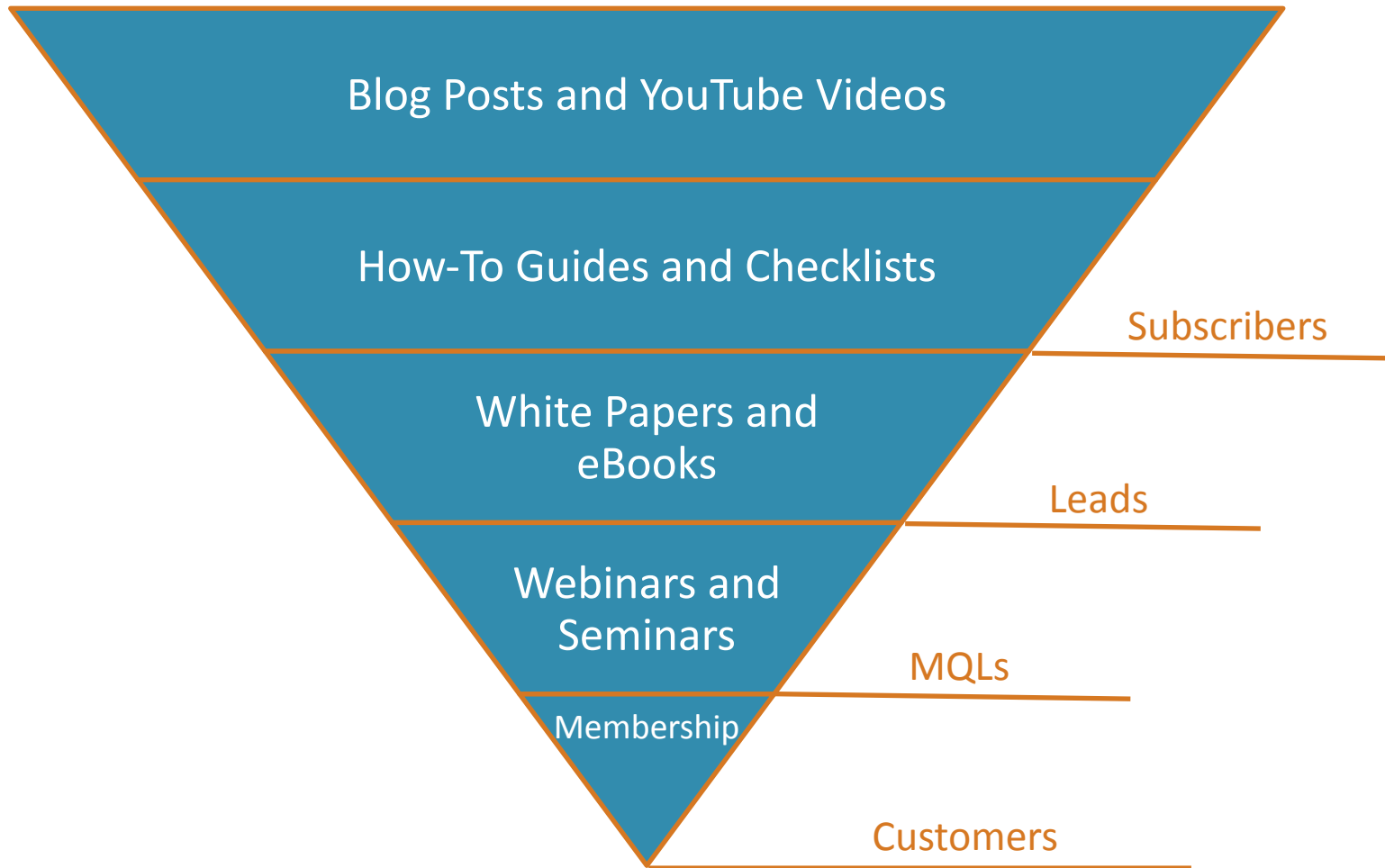










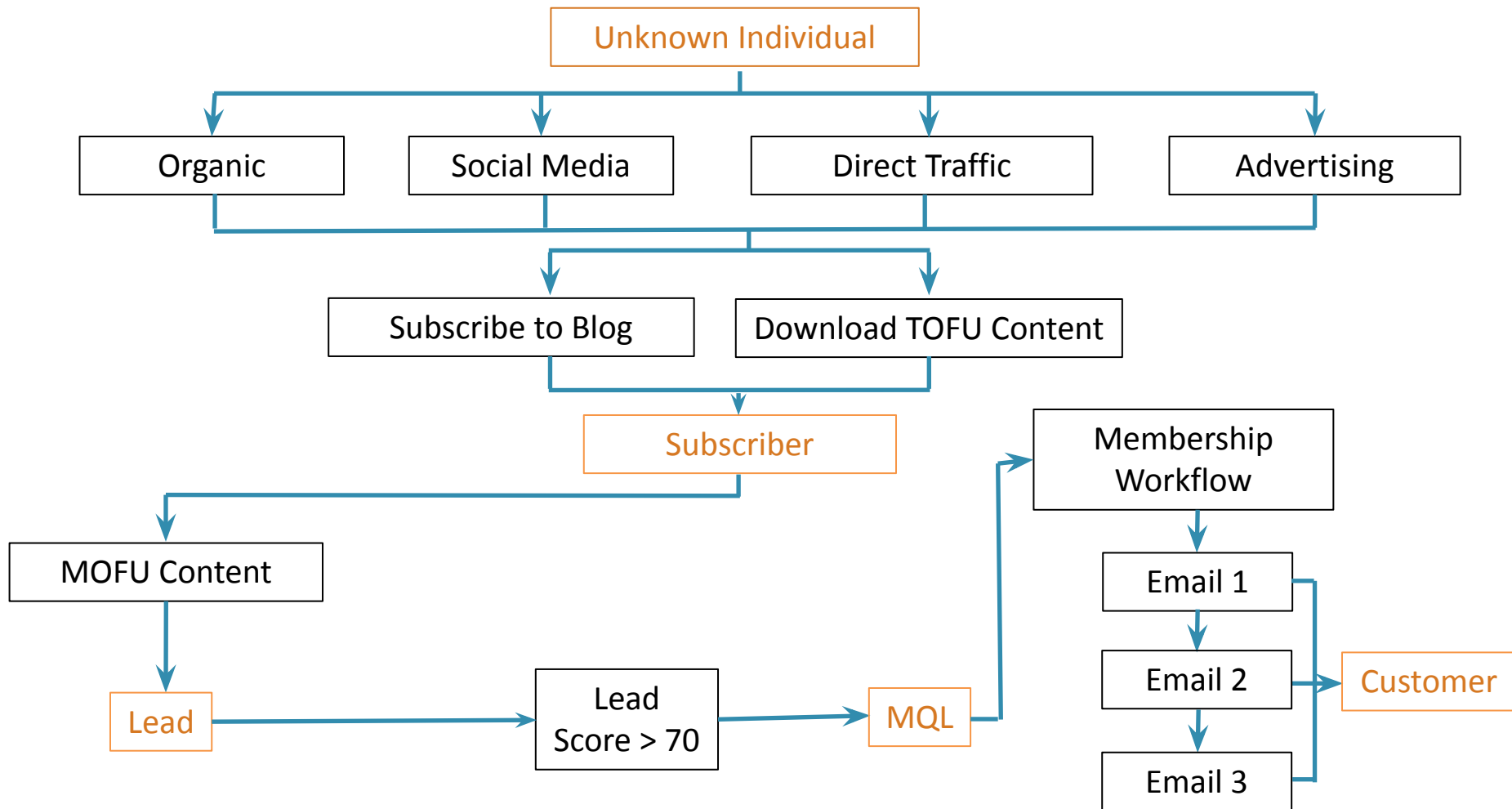


Step 3

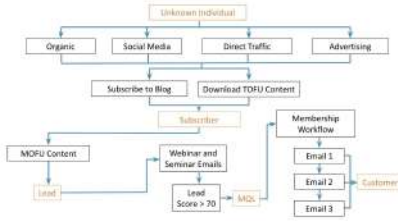
Organizing All of Our Content by Topic

All of our content could be organized into eight categories:

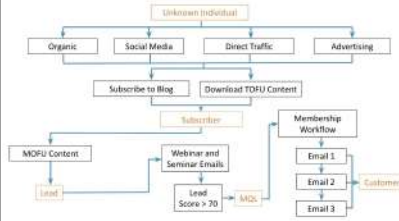
- Business Process Management
- Capture and Imaging
- Collaboration
- Electronic Records Management
- Enterprise Content Management
- Information Governance
- Sharepoint
- Taxonomy and Metadata



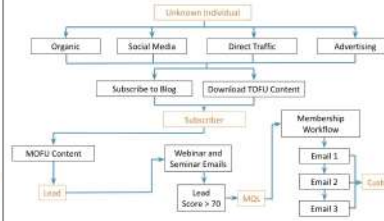
Business Process Management



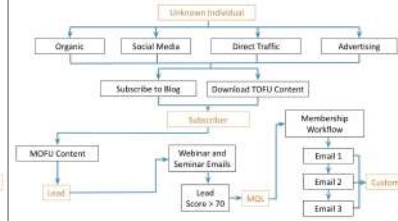
Capture and Imaging



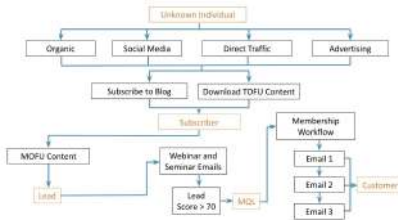
Collaboration



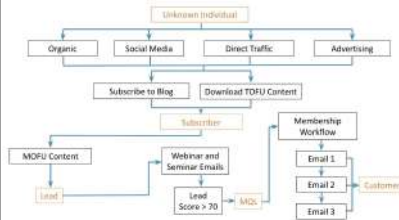
Electronic Records Management



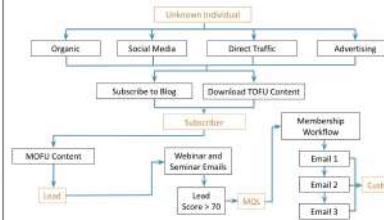
Enterprise Content Management



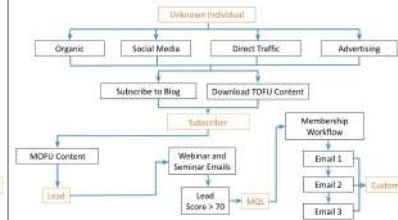
Information Governance



Sharepoint



Taxonomy and Metadata



Step 4

Having Fun with Smart Content

DATA - VS - CONTENT

DOES THE DISTINCTION STILL MATTER?

Share:



By: [Anthony Paille](#) on January 26th, 2023

 Print/Save as PDF

Data vs. Content: Does the distinction still matter?

[DATA MANAGEMENT](#) | [ENTERPRISE CONTENT MANAGEMENT \(ECM\)](#) | [INTELLIGENT INFORMATION MANAGEMENT \(IIM\)](#)

This is an article about names and whether or not they matter. My first intuition was to open with the quote, "What's in a name? That which we call a rose by any other name would smell just as sweet," but I thought better of it. Not because it was too cliché, which it was, but because it immediately transported me back to my sophomore year of high school, when the greatest achievement of my life up to that point was winning the role of Romeo in the drama club's production of *Romeo and Juliet*.

Please spare me the reminder of my nerdy teenage years!

Share:



How We've Been Defining Data and Content

To give us a starting point, let's first examine how AIIM and our community have been using these terms.

What is data?

Values, facts, figures, or any other forms of information that is organized in a specific format, making it easy for computers to process and analyze. Data is structured, meaning it lives inside a database.

What is content?

Text, images, audio, video, or any other form of information that is unstructured, meaning it lives outside a database.

What is information?

There's less consensus on a definition of information. Some would argue that information is data and content. Others might use content and information interchangeably. Still, others would argue information is the context or meaning behind the data.

[Get Your Free eBook: From ECM to Intelligent Information Management](#)

It's important to note that data analysts, CIOs, other executives, and line-of-business types all have their own definitions of these words. Acknowledgment of this fact will be important later in this conversation.

How Does the World of Content Management Tie to the Broader Enterprise IT Space?

AIIM published an eBook written by John Mancini in May 2017 called [From ECM to Intelligent Information Management](#). In it, Mancini identified several emerging trends:

- Explosive growth in volume and variety of data AND content. Billions of new connections between objects — the Internet of Things.
- Rise of new data-centric technologies — Hadoop, NoSQL, Blockchain.
- Incorporation of core content management capabilities directly in file platforms themselves (Office365, Amazon, Google, IBM/Box, DropBox) and collapsing prices for storage.

Share:



Still, others disagree, and there's likely an equally compelling case for maintaining the distinction.



Nick Inglis (He/Him) · 1st

Founder, InfoAdvocates. Founder, The Providence Watch Co. Corporate...

4mo · 🌐



Content is not data. Data is not content.

🌐 Anne Tülek and 10 others

3 comments · 1 repost

Reactions



+3



Like



Comment



Repost



Send

Clearly, this is an important dialogue to continue within the extended AIIM community to decide if our convenient distinction between what is meant by structured and unstructured information still holds up. Do we need to revisit our long-held definitions of these terms, or should we give in and use them as interchangeably as our executives and internal customers do?

GET YOUR FREE EBOOK

FROM ECM TO INTELLIGENT
INFORMATION MANAGEMENT

Download Now



Share



How We've Been Defining Data and Content

To give us a starting point, let's first examine how AIIM and our community have been using these terms.

What is data?

Values, facts, figures, or any other forms of information that is organized in a specific format, making it easy for computers to process and analyze. Data is structured, meaning it lives inside a database.

What is content?

Text, images, audio, video, or any other form of information that is unstructured, meaning it lives outside a database.

What is information?

There's less consensus on a definition of information. Some would argue that information is data and content. Others might use content and information interchangeably. Still, others would argue information is the context or meaning behind the data.

[Get Your Free eBook: From ECM to Intelligent Information Management](#)

It's important to note that data analysts, CIOs, other executives, and line-of-business types all have their own definitions of these words. Acknowledgment of this fact will be important later in this conversation.

How Does the World of Content Management Tie to the Broader Enterprise IT Space?

AIIM published an eBook written by John Mancini in May 2017 called [From ECM to Intelligent Information Management](#). In it, Mancini identified several emerging trends:

- Explosive growth in volume and variety of data AND content. Billions of new connections between objects — the Internet of Things.
- Rise of new data-centric technologies — Hadoop, NoSQL, Blockchain.
- Incorporation of core content management capabilities directly in file platforms themselves (Office365, Amazon, Google, IBM/Box, Dropbox) and collapsing prices for storage.

Share



How We've Been Defining Data and Content

To give us a starting point, let's first examine how AIIM and our community have been using these terms.

What is data?

Values, facts, figures, or any other forms of information that is organized in a specific format, making it easy for computers to process and analyze. Data is structured, meaning it lives inside a database.

What is content?

Text, images, audio, video, or any other form of information that is unstructured, meaning it lives outside a database.

What is information?

There's less consensus on a definition of information. Some would argue that information is data and content. Others might use content and information interchangeably. Still, others would argue information is the context or meaning behind the data.

[Learn More on Intelligent Information Management: Join AIIM+ Pro to Unlock a Robust Collection of Training Courses](#)

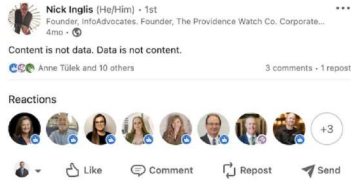
It's important to note that data analysts, CIOs, other executives, and line-of-business types all have their own definitions of these words. Acknowledgment of this fact will be important later in this conversation.

How Does the World of Content Management Tie to the Broader Enterprise IT Space?

AIIM published an eBook written by John Mancini in May 2017 called [From ECM to Intelligent Information Management](#). In it, Mancini identified several emerging trends:

- Explosive growth in volume and variety of data AND content. Billions of new connections between objects — the Internet of Things.
- Rise of new data-centric technologies — Hadoop, NoSQL, Blockchain.
- Incorporation of core content management capabilities directly in file platforms themselves (Office365, Amazon, Google, IBM/Box, Dropbox) and collapsing prices for storage.

Still, others disagree, and there's likely an equally compelling case for maintaining the distinction.



Clearly, this is an important dialogue to continue within the extended AIIM community to decide if our convenient distinction between what is meant by structured and unstructured information still holds up. Do we need to revisit our long-held definitions of these terms, or should we give in and use them as interchangeably as our executives and internal customers do?



Still, others disagree, and there's likely an equally compelling case for maintaining the distinction.



Clearly, this is an important dialogue to continue within the extended AIIM community to decide if our convenient distinction between what is meant by structured and unstructured information still holds up. Do we need to revisit our long-held definitions of these terms, or should we give in and use them as interchangeably as our executives and internal customers do?



The Results

Blog

- 23% increase in blog CTA clicks

Email

- 93.6% increase in open rates
- 220% increase in click-through rates

Lastly

01

Importance of
Personalization

02

Facing Association
Challenges with
Personalization

03

Best Practices and
Practical
Personalization Tips

04

AIM's Success Stories

05

Q/A



Q&A



Get started with an optimized marketing strategy.



www.readynorth.com 

www.aiim.org 

READY
N O R T H

 **aiim**