



# What's Working IN PERSONALIZATION?

Marketers Double Down On Customer Data, Digital Channels & Personalized Content To Improve Account Engagement & Conversions



SPECIAL REPORT

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# Introduction

With the impact of Covid-19 and the rapid digitalization of B2B, the need for personalized interactions with buyers has dramatically increased in 2020.

According to *Demand Gen Report's* **2020 Buyer Behavior Study**, 76% of buyers expect more personalized attention from marketers and salespeople because they want to develop an intimate relationship with the people/brand marketing to them.

Some marketers have struggled to grab and hold the attention of their target audiences in a noisy digital world and they're turning to personalization tactics to improve response rates, conversions, content creation and account engagement in 2021 and beyond. However, adopting these strategies and tactics into their overall marketing strategies is no easy feat.

According to experts, the most common challenges B2B companies face when attempting to be more personal with their buyers include:

- Misuse of customer data to identify buyer interests and needs;
- Attempting to reach buyers in the channels they are not active in;
- Lacking in authenticity by relying on generic messaging; and
- Providing meaningful personalized content/experiences.

"There's personalization, and there's personalization that is meaningful," said Matt Heinz, President of **Heinz Marketing**. "You have to come across as authentic. Each individual prospect doesn't care that you've been able to do this for thousands of prospects at a time, they care about themselves. They only care about the audience of one."

This report will highlight some of the best practices and real-world examples of successful personalization tactics in the B2B industry, exploring topics such as:

- The top channels for delivering personalized experiences;
- How customer data impacts the way marketers personalize their campaigns;
- The benefits of personalized video for ABM strategies; and
- The best content formats to deliver impactful experiences for buyers.



# Developing More Personalized Experiences Through Data-Driven Journeys

While **80% of B2B orgs** rushing to leverage their customer data to personalize their outreach, most are unable to effectively use that data.

According to Michael McLaren, Global CEO of **Merkle Group Inc.**, first- and third-party data are essential to identifying account needs, interests and preferred channels, and marketers should improve their first-party database with third-party providers. As a result, marketers and salespeople with strong first-party data can build personalization strategies that are more accurate and genuine.

Merkle has partnered with other data companies such as **Intel** and **Cisco** to improve its first-party database, gaining additional insights to improve their buyer intelligence. With this improved first-party data, Merkle has fostered more genuine one-on-one connections with their target accounts and informed their personalized content outreach.

“The goal is to keep using data and what we know about that individual customer to provide more fine-tuned, targeted messages that are most relevant to them,” McLaren explained. “The more relevant the marketing communication, the higher the likelihood that the customer is going to buy. You go from a model that’s one-to-many, to one-to-few and then 1:1. And once you get to 1:1, you’re really talking to a known individual.”

Randy Brasche, VP of Marketing at Folloze, also explained that intent data specifically allows marketers to build up their target audiences by identifying their needs and interests based on their website activity. This helped the Folloze marketing and sales teams determine the best ways to cater directly to their buyers’ needs with a sincere, educational approach.

Folloze leverages intent data to segment their target audiences at each stage of the buying journey, designing personalized 1:1 interactions that best fit the individual account’s interests. This enables their marketers to improve the effectiveness of their outreach, improving engagement rates as well as overall ABM campaign ROI.

“We focus on the experience level,” said Brasche. “How do you translate account engagement into revenue? We provide personalized experiences through data-driven journeys, depending upon where the prospect or customer is, to give folks that level of personalization. For example, if it’s early in the stage or if they’re early in the funnel, we can boost engagement and drive better personalization with virtual events before, during and after.”



# Maintaining Engagement By Providing Value Helps Increase Response Rates

Personalized content encourages the buyer to interact and engage with a brand multiple times, appealing to the person behind the account and laying the groundwork for future interactions. According to Heinz, buyers respond to more genuine attempts of connection, and content such as friendly emails and personal notes will resonate better and increase response rates.

For example, Heinz Marketing sends personal “Thank You” gifts/messages to individuals they partner or engage with. These personal notes help the company increase response rates before and after their interaction and guarantees future conversions by building a stronger relationship with that account.

“A heavy part of personalization is looking at triggers for engagement of value,” said Heinz. “Sending a quick one- or two-line note or calling and leaving a message on their voicemail goes a long way.”

Marlowe Fenne, ABM strategist at cyber security vendor **FireEye**, explained that marketers should avoid generic spray-and-pray content, and instead, create content that provides value to the individual. FireEye creates and shares intelligence reports, or “solution briefs,” for their buyers’ specific pain points to increase response rates and conversions.

“What we’ve done is put together a very bespoke version of personalized content that has high value for each customer,” said Fenne. “We’ve done it 1:1 by customer; we’ve also done it one-to-few by industry. I would say, from a pure return on investment standpoint and based on how much time it takes to create content, that one-to-few is working better for us because it has an 80% applicability to a certain group of customers with a certain common set of issues.”

Personalized video content has also allowed brands to deliver hyper-personalized experiences designed specifically for them, according to Tyler Lessard, VP of Marketing at Vidyard. Vidyard specifically uses personalized videos in their emails and product demos, which has allowed them to increase response rates and drive engagement in their ABM campaigns.

“Some of the most effective account-based strategies involve hyper personalization right at the individual or the account level, where quick pieces of content can be created just for that person or just for that account,” said Lessard. “Those can often have a much higher impact on generating a response and moving them through deal cycles.”

# How Personalized Video Can Improve Response Rates, Conversions & Engagement

TYLER LESSARD, VP OF MARKETING & CHIEF VIDEO STRATEGIST, **VIDYARD**



Video has been one of the standout types of content in 2020. **Research** from *Demand Gen Report* revealed that 65% of B2B buyers engage with branded video content throughout their buyer's journeys as a means of educating themselves about brands, solutions, industry trends, etc.

Marketers and salespeople, however, have begun leveraging personalized video to increase interactions with buyers. In ABM specifically, marketers have leveraged personalized videos to introduce themselves to or educate their accounts about their brand, product or potential relationship.

*Demand Gen Report* sat down with Tyler Lessard, VP of Marketing & Chief Video Strategist at Vidyard, to discuss how marketers can further leverage personalized video in their account-based strategies, and increase account response, engagement and conversion rates.

***Demand Gen Report: Vidyard does a great job of “drinking its own champagne” and creating a lot of personalized videos. Can you share some recent learnings and examples about what has worked well in 2020?***

**Tyler Lessard:** One of the things that I think has become really important in 2020 is the added layer of authenticity and trustworthiness in content that's being used for account-based marketing and selling. For general outreach to prospects, we're finding that more people are gravitating towards engaging with and responding to content that features real people from your organization. That includes content that's visual and transparent, using mediums like video to clearly and authentically deliver messages that are designed to

be truly helpful for potential buyers and don't feel like it's really marketing or selling. This has been a long-time trend in marketing and sales, but in 2020, it's been accelerated, and the expectations of buyers continue to shift in this way. The great news for marketing and sales teams is that it means we can start to leverage in-house-created video content, even content that's recorded and shared by your individual sales reps, as a true 1:1 content experience (as opposed to traditional one-to-many content assets).

***DGR: Specific to marketing programs, can you share best practices or some advice on how companies should be integrating their personalized videos into their emails, landing pages, social channels, etc.?***

**TL:** Video offers two really big benefits for ABX programs. The first is that it can give you a new, visual way to stand out from much of the other noise and digital information that your prospects are receiving or engaging with.

In addition to helping you stand out, video is a great way to engage and educate prospects in your ABM programs. By using videos, you can very clearly articulate and show what value you bring, what kinds of problems you solve and how you've helped other businesses like theirs. In today's world, those educational videos targeted at key accounts can be created easily in-house. In many cases, we're now seeing businesses create targeted videos for key accounts that are specific to them. So not only using the self-educational videos but creating very targeted tutorials or thought-leadership videos specifically for key accounts or specific segments of the accounts that they're going after. This level of personalization and targeting continues to generate higher engagement rates with prospects.

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**TYLER LESSARD, VIDYARD**

***DGR: How are you seeing companies successfully integrate video into their ABM programs from a sales vantage point?***

**TL:** I think a really big win right now is empowering sales reps to be able to create and share custom, hyper-personalized videos for key accounts. Sales reps are now getting much more creative and personalized in the ways that they're using video to reach key accounts. Many of them are already creating a custom video for a prospect to get their message across, but for key accounts, we're finding the most successful reps are hyper-personalizing that content by using visuals that account will recognize and identify with to increase their chances of engagement. They'll partner up with their marketing team to come up with campaign-based videos or a strategy for what types of creative videos they could create.

***DGR: How are you seeing brands demonstrate their ROI more by using video, and should sales and marketing teams be looking at different metrics in the current climate?***

**TL:** We're seeing more focus on account engagement as metrics for leading indicators of success. We are seeing a focus on metrics related to deal progression, how targeted accounts are moving through the sales process and how quickly that is happening. That includes both deal acceleration as well as deal progression. Then, ultimately looking at the pipeline generated, and revenue closed within key accounts.

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**TYLER LESSARD, VIDYARD**



# Personalizing Digital Channels To Build Buyer-Seller Relationships

With the acceleration of digital initiatives in light of the 2020 pandemic, it's important for B2B orgs to personalize their interactions and experiences in every channel for their buyers.

According to Brasche, personalization on social media channels such as LinkedIn and Twitter drives brand awareness and engagement and opens the door for salespeople to interact with buyers. Folloze, for example, uses its digital channels to give buyers an understanding of what the solution can offer, helping them build a buyer-seller relationship that increases conversions through education.

Company websites are often an overlooked media channel for personalization. "There's a number of different channels that exist in any B2B marketer's playbook, but the ones that typically start on a personalization track are the landing page experiences," said Merkle's McLaren. "Customize landing page environments for customers, as they are the thing that greets prospects as they come to interact with you."

Fenne highlighted how FireEye implements an omnichannel strategy based on the buyer's role. C-level executives have different personalized experiences than CMO and CEO accounts, which allows marketers and salespeople to build more personal relationships in their ABM strategies while increasing C-level engagement and conversion rates by 5X.

"What we've done is allot specific channels to fewer people that were more personalized and interactive," Fenne stated. "For example, we set up a roundtable for executives, where they get to meet with other industry leaders and their peers in our company at the C-level and engage in a back-and-forth conversation. The higher you go, the more interactive they want that to be, and the channels you use become an important factor."

Heinz Marketing opted for the virtual event channel, partnering with **6sense** to create **CMO Coffee Talk**. The virtual conference — where various CMOs answer and discuss crowd-sourced topics — allows the companies to engage with buyers and deliver a virtual experience that engages audiences in an intimate setting and drives better relationships.

"When you can personalize the entirety of the content, it makes a bigger difference," Heinz explained. "You can also customize the way it is presented. When it is presented, we think a lot about mail, the merging of contacts and getting the right message out to someone that's relevant. Getting it to the right person at the right time, in the right way, can make a big difference."



# Conclusion

Personalization is critical for B2B marketing and sales strategies and appears to be an important initiative for driving engagement and ROI. With the rapid digitalization of B2B and the continued impact of the pandemic, marketers and salespeople must advance their personalization strategies into 2021.

However, there is no one way to personalize interactions with target audiences, as every buyer has their own preferences, needs, pain points and expectations. Experimentation has helped B2B organizations improve their personalization strategies and seems to be the way forward for the industry.

“If you haven’t had some misadventures or failures in your personalization efforts, then you’re probably not trying enough new things,” said Fenne. “One out of every five things that I try from a personalization perspective doesn’t go well. Your personalization strategy is just getting started. Be bold and try new things.”

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**MARLOWE FENNE, FIREEYE**

# Additional Resources



Vidyard is the video platform that helps businesses drive revenue through the strategic use of online video. Going beyond video hosting and management, we help businesses connect with more viewers through interactive and personalized video experiences, learn powerful insights on their viewing audience, turn insights into action with enterprise integrations, and prove the impact of their video programs.

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*Demand Gen Report* is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts.

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