

# The Quickstart Guide to Applying Intent Data at The Individual Level

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An Inside Look at How B2B Brands Are Utilizing First-Party  
Data to Better Understand The Interests Of Specific Buyers


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# Introduction

Knowledge is power — and when it comes to the complexity of identifying the interests and needs of multiple buyers within multiple accounts, the more knowledge B2B brands can gather, the better. Therefore, it is no surprise that 51% of B2B marketers surveyed in *Demand Gen Report's 2020 Demand Generation Benchmark Study* are using intent data to better assess prospects who are actively researching a buying decision, and 38% say personalizing buyer engagement is a top priority for 2020.

Understanding buyer intent is especially challenging for B2B organizations with a complex matrix of product or service offerings, buyer personas and locations. That's why more and more B2B revenue teams seek to go beyond account intelligence and gather deeper contact level intelligence from intent data.

When asked why they plan to invest in better data enrichment solutions, 76% of marketers in *Demand Gen Report's 2019 Database Strategies & Contact Acquisition Benchmark Survey* said they want better insights to personalize content and messaging; 46% want deeper intelligence to help tie intent signals to specific contacts.

In order to spot new potential buyers demonstrating interest in their solution area, many B2B organizations are adding third-party information on search data. However, many have overlooked the full value of intent data because they are not gathering first-party data on when and where prospects and customers are engaging with their content on their own websites and landing pages.

Some B2B marketers are missing out on the opportunity to capture first-party intent data on their own websites. Instead, they rely on generalized firmographic or IP data from third-party providers, which is of limited use in understanding individual intent. Others collect first-party data but are unsure how to use it.

Marketers are realizing that enhanced data practices can power more personalized campaigns, and that the more granular the intent data they gather, the better they can tailor their strategies to key audiences.

B2B brands ranging from financial services to information services to technology are harnessing the power of first-party intent data to address their unique go-to-market challenges. This white paper examines how B2B marketing professionals at companies including Hewlett Packard Enterprise, Capital Group and IHS Markit use first-party intent data to better understand a specific buyer's interests and provide personalized experiences.



## Breaking Down the Different Types of Opt-In Intent Data

**First-party intent data is generated and resides in internally owned and operated systems and records.**

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**SIRIUSDECISIONS**

As B2B brands' adoption and utilization of intent data expands, industry analysts are stressing the importance of understanding the different roles and applications of different types of intent data.

According to Sirius Decisions' Intent Data Framework, "Third-party intent data is acquired, stored, analyzed and shared from external sources."

*Identified* third-party data primarily gathers signals about anonymous users based on digital information such as IP address or location.

*Opted-in* third-party data typically comes from content syndication networks that use gated content to gather permission from, and information about, individuals.

"First-party intent data is generated and resides in internally owned and operated systems and records," according to Sirius Decisions. "For example, marketing automation platforms and Web analytics often show what links are being clicked, which pages are being viewed and time spent on specific pages."

*Identified* first-party intent data may be account-level information gleaned from reverse IP lookup, or anonymous individual-level data gathered from website cookies. *Opted-in* first-party intent data "often comes from providers that offer publishing networks for content syndication purposes," Sirius Decisions states. "Users give explicit permission to the publisher and its partners to contact them in exchange for [gated content]."



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Third-party intent data has proven to be successful at some applications. For example, learning that buyers from a certain account are consuming your content can drive account-based advertising or inform your sales strategy. But third-party data doesn't give the full picture because it reflects information about the account, not the individual.

Industry analysts have pointed out some key differences between first-party and third-party intent data:

- **Because third-party intent data focuses on the account level,** brands have found it difficult to use it to build datasets relevant to individuals.
- By gathering first-party intent data from interactions with their owned audience interactions, companies have been able to **build a proprietary dataset that goes beyond the account level to the individual level.**
- **Third-party intent data providers typically categorize content in broad terms,** which may not be aligned with the same terminology brands are using.
- By developing their own first-party intent dataset, **brands have been able to categorize content using the terms most relevant to their businesses.**
- **Even if third-party data is opted-in,** you can't be completely sure how it was gathered.
- **Brands using first-party data can be more confident of complying with privacy regulations** such as GDPR and the California Data Privacy Protection Act.



# Applying First-Party Intent Data to Build 1:1 Level Targeting At Scale

**B2B brands ranging from financial services to technology are harnessing the power of first-party intent data to address their unique GTM challenges.**

While third-party intent data can power account-based advertising campaigns to drive web traffic, creating personalized experiences at the individual level requires first-party intent data. Here's how four B2B enterprises use first-party intent data, intent profiling and automated decisioning to build scalable 1:1-level targeting.

## **PERSONALIZING WEB EXPERIENCES FOR CONTENT SUCCESS**

Marketers at **Hewlett Packard Enterprise (HPE)**, which has a wide range of offerings and clients in a variety of industries worldwide, knew gaining insights into customer and prospect intent could focus sales efforts. HPE used first-party intent data for internal purposes such as sales enablement and digital nurture campaigns, says Gabrielle Boko, Global Vice President Digital. With more than 13,000 content assets, "we were really struggling with personalization around content," Boko says.

Tagging and recommending content for each visitor manually wasn't feasible, so HPE implemented the Idio (an Episerver company) platform to automatically personalize web experiences. Idio ingests HPE's website content, identifies all relevant topics in each asset and scores each topic's importance within the asset. As visitors consume content on the HPE site, Idio generates an intent profile for each visitor and uses that profile to serve them highly targeted content. Each interaction provides new intent data, continually refining the profile's accuracy.



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"Every time we use [personalization], every single piece of content sees a positive lift," Boko says. Specific results from deploying the Idio platform have included:

- **126% increase in content engagement;**
- **160% increase in unique clicks; and**
- **275% increase in form fill conversions.**

HPE is exploring expanding Idio into additional content engines, email campaigns, digital nurture platforms and its thought leadership platform. Boko also looks forward to integrating Idio with Adobe Audience Manager, which HPE is preparing to deploy: "We think the combination will give us more power around targeting, personalization and content success."

## **DRIVING INCREASED ENGAGEMENT USING INTENT DATA**

Categorizing a massive content library wasn't the issue for **Capital Group**, one of the oldest and largest asset management companies in the world. Operating in several countries across the Asia Pacific region, it manages a range of multi-asset, equity and fixed income investment strategies, serving institutional clients and financial intermediaries.

Every month, Capital Group publishes two to three pieces of in-depth thought leadership content, which appear on its country-specific websites in chronological order. Seeking a way to personalize visitors' content experience, the marketing team implemented Idio on its websites' home pages.



**Idio's recommended content demonstrates 50% more engagement for Capital Group.**

"Idio was a very easy and cost-effective way to offer personalization," says Derek Perry, Managing Director, Digital Marketing for Capital Group Europe & Asia. Idio tracks visitors' website activity and uses that insight to display content based on relevance, not chronology. "If someone is predominantly looking at fixed income investments, for example, [Idio] puts bond-related [content] at the top of the page," Perry explains.

**Compared to a control group of visitors whose content isn't personalized, Perry says visitors who see Idio's recommended content demonstrate 50% more engagement.** "To get that kind of result simply by ordering the content in a certain way is fantastic."

## **INTEGRATING INTENT DATA TO POWER MULTIPLE PERSONA-BASED PROGRAMS**

**IHS Markit** uses the Idio platform across multiple channels. A leading research and information services organization whose clients include over 80% of the Fortune Global 500 and 94 of the 100 largest U.S. corporations, the company's expertise spans numerous industries, including finance, energy and transportation.

"Our big challenge is we serve a lot of different personas," says Byron O'Dell, Head of Corporate Marketing/Executive Director at IHS Markit. "We also have a tremendous content library, so we're constantly evaluating our industries, our product offering and our content to determine, 'What would this persona be interested in?'"

IHS Markit initially integrated Idio with Eloqua to automatically personalize email experiences. The pilot generated a 700% improvement in CTR compared to marketing automation emails and a 200% improvement in CTR compared to expert-curated content.



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BYRON O'DELL,  
IHS MARKIT

Next, the company implemented Idio for website personalization. Some site visitors see Idio's recommendations; others see content chronologically. **Users seeing personalized recommendations are 20% more likely to consume more content, 68% more likely to return to the site and 150% more likely to become sales inquiries, O'Dell says.**

Most recently, IHS Market piloted personalization on a display network powered by Idio's recommendation engine. When users who didn't convert on the company website visit relevant display network areas, they see the same content they would have seen on IHS Markit.com. The tactic boosts engagement and expands opportunities for conversion.

The granularity Idio provides also helps IHS Markit better personalize experiences. Manually categorizing and tagging content limited the company to a few hundred different tags. “With Idio, we can have 25 million tags,” O'Dell says.

“As marketers, we're all trying to get to this elusive one-to-one marketing,” O'Dell continues. “We know that the ideal customer segment is one person. We understand their needs, their buying process and how our products can solve their problems. But we don't have the resources to personalize content [on a one-to-one] level. Idio's technology handles that for us.”

## EMPOWERING SALES WITH A DEEPER UNDERSTANDING OF USERS

Personalization is a core marketing strategy for **BNY Mellon**, a global investments company that targets professional investors. But the company's digital strategy — developing personas, identifying clear needs, and serving content across core mapped journeys — wasn't delivering the level of one-to-one personalization the marketing team sought, explained Dominic Traynor, Global Head of Digital Experience.





The company's internal economists, investment strategists and fund managers create about 10 content assets per week. Before BNY Mellon implemented Idio, assets were manually tagged by the editorial team and served up to users by BNY Mellon's CMS or syndication to third-party sites. The marketing team used both proprietary and third-party behavioral and transactional data to better segment clients and deliver more relevant content. However, Traynor wanted to provide a more relevant web experience, drive deeper engagement with content, and encourage more regular website visits. The ultimate goal was to provide the sales team with greater insights to support sales efforts.

In the second half of 2019, BNY Mellon launched a pilot program in which Idio tags the site's content, understands the digital "body language" of both anonymous and identified web visitors and algorithmically serves them the most relevant piece of content. Machine learning enables the software to continually improve its recommendations as it gathers more data on user behavior.

The team quickly saw measurable impact in the form of increased CTR, page views, unique visitors and interactions per unique visitor (IPU). **Since implementing Idio, CTR has risen 17% to 35% across the live widgets, with more than 3,000 interactions with articles housed within Idio widgets across the BNY Mellon website. Early on in the pilot, interactions per unique visitor rose by 15% with an average of 1.79 IPU. As the pilot progressed, that rose to a 25% increase and an average of 1.90 IPU.** Traynor said the site has also become stickier as greater engagement, relevancy and discovery of content drive increased dwell times.



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**Idio will enable us to paint a clearer picture of the client or prospect through their first-party intent data.”**

**DOMINIC TRAYNOR,  
BNY MELLON**

The marketing team is currently assessing the data garnered from the pilot to help establish a robust content management plan going forward and to inform the user journeys and content provided on the site. “It may be that users get to a point where the journey on the website ends and the onward engagement for that particular topic, product or theme is served via personalized email or another means,” Traynor said. “I see this as a constant evolution of content management as our understanding of our users deepens.”

In the second phase of their pilot program, BNY Mellon will connect their CRM platform, Marketo, to leverage the first-party intent data Idio captures to scale the impact of triggered email campaigns in the months ahead. “We expect our intent powered triggered email and paid media campaigns to enhance the client experience through other core channels with greater relevancy,” said Traynor. “Extrapolating out, Idio will enable us to paint a clearer picture of the client or prospect through their first-party intent data. These insights will enable deeper conversations and more energizing solutions for marketing to better empower our sales team.”

# What Kinds of Organizations Benefit Most From First-Party Intent Data?

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First-party intent data can help any B2B company with a content-driven customer journey personalize experiences.”

SEBASTIAN  
HEMPSTEAD, IDIO

First-party intent data can help any B2B company with a content-driven customer journey personalize experiences, Sebastian Hempstead notes, but it's particularly valuable for:

- Companies that sell to enterprises and want to move beyond account-based marketing.
- Companies that have many customer personas and want to better personalize content for them.
- Companies whose customer decision process involves consuming a lot of content, such as those selling technology or financial services.
- Companies with large content libraries who can benefit from AI's speed, consistency and precision in identifying content topics and ranking them in order of importance.



## The Importance of Cross-Channel Integration of Intent Data

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By merging [first-party data] with other datasets, you can understand and use intent information to make much more focused decisions around the customer.”

SEBASTIAN  
HEMPSTEAD, IDIO

Inconsistent interaction across channels can slow the sales journey. Cross-channel integration of intent data is essential to provide consistent personalization. Combining first-party intent data with other first-party data, you own can provide even deeper insights into a prospect's or customer's intent.

For example, capturing first-party intent data from a gated asset download and linking that information with existing first-party data in your CRM, MAP or BI platforms can reveal if the user is a current customer or a prospect, show you their past purchases or interactions, identify cross-sell opportunities and more. Armed with this data, marketers and sales teams can take more informed actions. Marketers can deliver increasingly targeted content in the user's preferred channels. Salespeople can make more specific product recommendations and know how best to follow up with the user.

“The journey [must] be about the customer and consistent across channels,” Hempstead explains. “By merging [first-party data] with other datasets, you can understand and use intent information to make much more focused decisions around the customer.”

**For organizations with large content libraries, integrating AI-based solutions, such as Idio, into the CMS or email marketing program can save time, increase granularity and improve personalization.** Instead of manually creating segmenting or decisioning rules to deliver content, or manually tagging and categorizing tens of thousands of assets, marketers can rely on AI to extract topics more quickly, consistently and precisely than humans, thus providing more tailored recommendations.



## **Conclusion**

Today's B2B sales journey puts the customer firmly in the driver's seat — but marketers can still shape the journey by responding to customer intent signals. To successfully sell to the enterprise, savvy marketers are moving beyond accounts and industries to target individual buyers with personalized content.

Nearly three-fourths (73%) of respondents to *Demand Gen Report's 2019 Content Preferences Survey* say they have less time to devote to reading and research and typically consume three to seven pieces of content before engaging with a salesperson. Most of this content is consumed during the early to mid-stages of the buyer's journey. By harnessing data from intent signals, B2B organizations can ensure that customers and prospects see highly relevant content, enhancing engagement and accelerating sales.

Building a robust dataset of proprietary first-party intent data and combining those insights with third-party intent data gives organizations a fuller picture of individual intent and can help achieve key goals such as improving conversion rates, generating higher-quality leads and engaging the right contacts within accounts. But in order to achieve personalization at scale, marketers must deploy technology.

"As [marketers are increasingly] required to personalize and make recommendations, companies who don't have a built-in data science team will need something simple and scalable in order to deliver," says HPE's Boko.

Technology that uses intent data to automate personalization can help marketers harness the full potential of their datasets to deliver one-to-one, relevant experiences and achieve today's ultimate marketing goal: making every customer interaction truly customer-first.



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Idio, an Episerver Company, makes 1:1 marketing possible for global B2B enterprises. The platform uses Content Intelligence to predict the interests of every individual and automatically deliver relevant 1:1 experiences across digital channels. Idio was named by Forrester Research as a Breakout Vendor in 2017, and a Cool Vendor by Gartner in 2019. For more information please see [www.episerver.com](http://www.episerver.com) and [www.idio.ai](http://www.idio.ai).

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Episerver, the customer-centric digital experience company, combines content, commerce, multi-channel marketing and predictive analytics in a single Digital Experience Platform (DXP) to work full-circle for businesses online – from intelligent optimization and lead-generation through to conversion and repeat business – with unprecedented ease-of-use. Idio is available as a fully integrated part of Episerver Customer-Centric Digital Experience Platform as Episerver **Content Intelligence** and Episerver **Content Recommendations**.

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