

RASMUS HOULIND
& FRANS RIEMERSMA

HELLO \$FIRSTNAME PROFITING FROM PERSONALIZATION

INTERNATIONAL CASE STUDIES

EVER HAD TO TIE A BOWTIE?
MASTERING PERSONALIZATION IS JUST
AS HARD! THIS BOOK IS YOUR GUIDE TO
UNDERSTANDING PERSONALIZATION
AND HOW TO TURN IT INTO VALUE FOR
BOTH YOU AND YOUR CUSTOMERS.

INSIGHTS

CONTENT

Models and illustrations from the book 'Hello \$Firstname'



OMNICHANNEL
INSTITUTE

About the author

Rasmus Houlind

Author and founder of Omnichannel Institute
Chief Experience Officer at Agillic

Author:

"Hello \$Firstname: Profiting from Personalization " (2023)

"Make it all about me" (2019)

"Hvis det handler om mig, så køber jeg!" (2015)



 [linkedin.com/in/houlind](https://www.linkedin.com/in/houlind)

 rasmus@omnichannelinstitute.com

 +45 53 886 555



A note from the author

The cornerstone of my authorship has always been to make the complexity of modern marketing comprehensible for the marketers who are actually there in the trenches making it happen. That's why I always strive to develop models to quickly and efficiently enable an understanding of complex topics.

Modern marketers struggle with communicating with top level management on the one hand and actually getting real marketing working on the other. And it's never a one-man-task. Teams who share the same mental images and use the same terms for their work are able to have unambiguous yet nuanced conversations about personalized marketing and customer experiences. That's a fundamental part of marketing success.

This document includes all the models used in the book 'Hello \$Firstname – Profiting from Personalization'. I encourage you to use and share these models with your teams, your colleagues and your friends. My only ask is that you please reference the book whenever you are doing so.

Rasmus Houlind, Copenhagen 2023



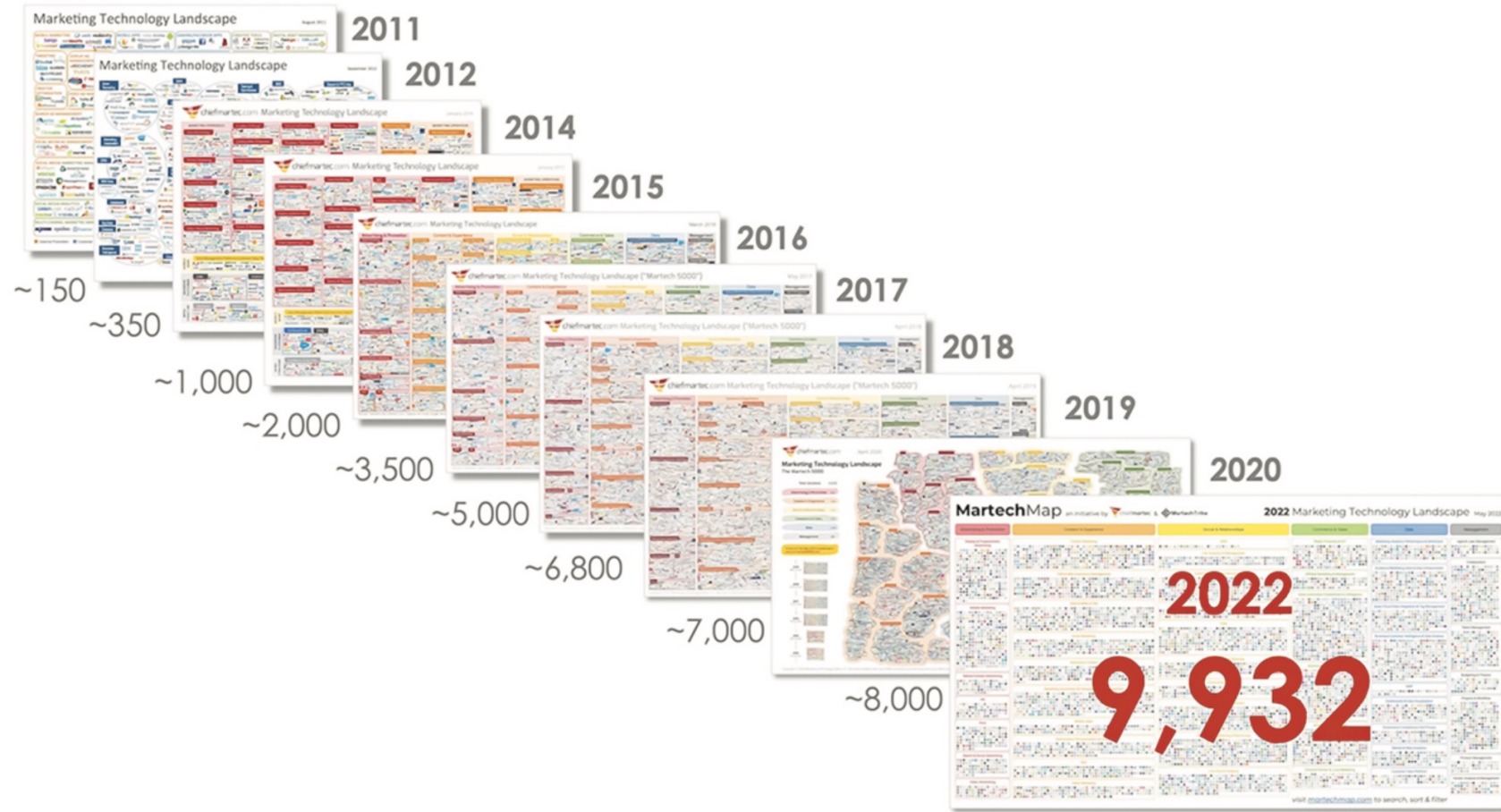


Figure 1. The Martech Landscape from 2011 to 2022, showing a growth of 6,521%

		Percentage represent text similarity of vendor homepages by subcategory, using ML and 226 Wikipedia keyword																																																
		print	mobile marketing	search & social advertising	display & programmatic advertising	pr	video advertising	native/content advertising	marketing automation & campaign/lead management	DMA & MRM & DM	email marketing	optimization personalization & testing	crm & web experience management	seo	content marketing	interactive content	mobile apps	video marketing	slm	customer experience service & success	advocate/loyalty & referrals	crm	live chat & chatbots	call analytics & management	social media marketing & monitoring	community & reviews	Events, Meetings & Webinars	Influencers	channel partner & local marketing	affiliate marketing & management	sales automation enablement & intelligence	e-commerce marketing	e-commerce platforms & carts	reach, frequency & OT	customer data platform	drmp	mobile & web analytics	business/customer intelligence & data science	ipaaS cloud/data integration & tag management	marketing analytics performance & attribution	governance compliance and privacy	audience/targeting data & data enhancement	dashboards & data visualization	vendor analysis & management	product management	projects & workflow	agile & lean management	talent management	collaboration	budgeting & finance
	Max-Min	0.57	0.56	0.61	0.38	0.43	0.44	0.35	0.57	0.48	0.61	0.52	0.48	0.60	0.64	0.44	0.50	0.46	0.41	0.63	0.53	0.60	0.52	0.53	0.60	0.54	0.47	0.62	0.52	0.54	0.56	0.48	0.53	0.43	0.58	0.55	0.53	0.64	0.51	0.60	0.52	0.72	0.52	0.41	0.52	0.51	0.41	0.49	0.38	0.38
	Avg	9.1%	8.8%	8.4%	8.0%	7.7%	7.3%	6.7%	11.0%	9.6%	9.2%	8.9%	8.7%	8.6%	8.6%	8.0%	7.7%	6.9%	10.8%	9.9%	9.9%	9.8%	8.9%	8.9%	8.8%	8.2%	8.7%	7.8%	10.3%	9.5%	8.8%	8.6%	8.4%	8.3%	12.6%	12.0%	10.0%	9.7%	9.3%	9.7%	9.6%	9.9%	8.8%	9.9%	9.6%	8.8%	8.6%	8.3%	7.7%	7.4%
Personalized_marketing	36.4%	21%	20%	17%	17%	15%	16%	11%	27%	19%	22%	20%	16%	16%	17%	17%	14%	14%	27%	22%	24%	20%	20%	19%	18%	16%	14%	18%	23%	19%	19%	20%	17%	18%	35%	31%	23%	20%	19%	22%	16%	22%	17%	21%	18%	15%	14%	15%	13%	12%
Customer_relationship_management	18.3%	18%	16%	14%	13%	13%	11%	8%	26%	18%	18%	17%	16%	13%	13%	17%	15%	11%	25%	28%	26%	31%	23%	24%	17%	18%	15%	13%	23%	17%	20%	20%	19%	17%	30%	24%	23%	19%	18%	18%	15%	20%	16%	16%	20%	17%	18%	18%	14%	14%
Customer_experience	16.3%	16%	15%	13%	12%	11%	12%	9%	20%	16%	14%	17%	15%	10%	13%	17%	14%	12%	17%	29%	25%	19%	21%	19%	15%	18%	14%	12%	20%	13%	16%	19%	19%	16%	29%	22%	22%	16%	13%	15%	13%	16%	13%	14%	19%	14%	14%	16%	12%	11%
Social_media_marketing	16.1%	18%	18%	17%	18%	22%	20%	16%	21%	17%	16%	16%	14%	16%	18%	15%	11%	17%	15%	21%	12%	14%	15%	13%	28%	17%	13%	23%	20%	19%	14%	15%	14%	13%	19%	21%	16%	14%	12%	18%	11%	16%	12%	20%	13%	13%	10%	12%	11%	10%
Content_marketing	15.6%	18%	16%	13%	15%	18%	19%	14%	23%	20%	18%	16%	18%	17%	25%	14%	10%	18%	19%	13%	19%	13%	19%	14%	14%	13%	19%	14%	22%	22%	18%	15%	13%	14%	20%	17%	14%	14%	11%	18%	9%	15%	10%	21%	15%	13%	9%	11%	11%	9%
Customer_engagement	15.2%	15%	16%	12%	14%	13%	13%	12%	21%	14%	14%	16%	14%	11%	15%	17%	11%	13%	18%	22%	24%	16%	19%	16%	18%	18%	12%	16%	19%	13%	15%	16%	14%	13%	25%	23%	18%	14%	11%	15%	10%	16%	11%	15%	14%	11%	14%	10%	9%	
Customer_intelligence	15.2%	15%	14%	12%	12%	11%	10%	7%	20%	14%	16%	15%	13%	12%	11%	15%	12%	10%	23%	24%	20%	20%	18%	19%	13%	14%	12%	9%	16%	13%	16%	16%	15%	15%	30%	25%	22%	19%	16%	17%	15%	19%	17%	13%	15%	13%	13%	11%	12%	
Marketing_intelligence	15.0%	16%	15%	14%	13%	14%	12%	8%	22%	15%	16%	15%	12%	14%	13%	12%	11%	10%	25%	17%	18%	16%	15%	15%	12%	11%	14%	19%	16%	16%	15%	13%	15%	29%	27%	20%	19%	17%	21%	14%	20%	17%	18%	15%	12%	11%	13%	10%	11%	
Data_driven_marketing	14.9%	16%	16%	13%	13%	14%	12%	9%	25%	13%	20%	16%	12%	15%	13%	13%	8%	9%	25%	14%	19%	14%	14%	16%	12%	10%	16%	19%	16%	15%	15%	11%	14%	34%	33%	20%	19%	17%	24%	12%	22%	17%	18%	11%	11%	8%	9%	8%	9%	
Customer_service	14.7%	14%	13%	12%	10%	10%	9%	7%	19%	14%	14%	15%	14%	11%	12%	14%	13%	10%	14%	29%	21%	19%	23%	20%	13%	16%	12%	8%	16%	12%	14%	16%	17%	14%	24%	16%	19%	15%	13%	12%	13%	14%	13%	10%	17%	13%	15%	15%	11%	11%
Customer_data_platform	14.6%	14%	15%	14%	12%	10%	11%	7%	20%	12%	15%	15%	12%	12%	11%	13%	12%	9%	23%	19%	18%	15%	16%	14%	13%	11%	12%	12%	15%	13%	14%	14%	12%	14%	42%	36%	22%	20%	21%	22%	18%	24%	21%	13%	13%	12%	11%	12%	10%	11%
Customer_support	14.4%	14%	13%	11%	10%	11%	9%	7%	18%	15%	16%	13%	15%	11%	12%	13%	13%	10%	14%	25%	18%	19%	21%	20%	13%	16%	13%	8%	15%	13%	14%	14%	16%	13%	18%	13%	17%	14%	15%	12%	14%	14%	13%	11%	17%	14%	16%	15%	12%	11%
Customer_success	14.3%	14%	13%	11%	11%	10%	9%	7%	18%	14%	12%	14%	13%	10%	11%	14%	11%	10%	19%	25%	21%	20%	19%	18%	12%	15%	13%	9%	16%	12%	15%	15%	16%	14%	23%	18%	19%	15%	12%	12%	13%	14%	12%	11%	18%	14%	17%	16%	12%	11%
Marketing_automation	14.2%	16%	15%	12%	12%	12%	10%	7%	28%	16%	22%	15%	12%	14%	13%	12%	8%	8%	24%	12%	17%	18%	13%	16%	14%	10%	11%	15%	21%	17%	15%	15%	11%	13%	24%	20%	15%	15%	19%	10%	16%	11%	18%	12%	12%	11%	11%	9%	8%	
Advertising_campaign	14.0%	18%	17%	16%	17%	16%	16%	13%	23%	16%	18%	13%	11%	13%	14%	12%	8%	11%	20%	12%	19%	13%	13%	16%	12%	10%	20%	20%	17%	13%	15%	11%	13%	21%	21%	14%	13%	12%	18%	8%	15%	10%	20%	13%	11%	8%	9%	9%	8%	
Customer_advocacy	13.9%	15%	13%	12%	11%	11%	10%	8%	20%	14%	14%	14%	13%	11%	12%	13%	10%	10%	17%	22%	23%	17%	18%	16%	13%	14%	11%	13%	18%	14%	14%	16%	14%	13%	24%	16%	18%	13%	11%	14%	10%	14%	10%	13%	15%	11%	11%	11%	10%	9%
Community_marketing	13.8%	15%	14%	11%	12%	14%	11%	10%	22%	16%	16%	13%	13%	12%	14%	13%	10%	10%	17%	16%	20%	14%	15%	14%	14%	18%	11%	16%	19%	15%	13%	14%	12%	13%	20%	16%	15%	12%	12%	15%	10%	13%	10%	18%	15%	12%	11%	12%	11%	7%
Product_management	13.8%	14%	12%	16%	11%	11%	9%	7%	18%	23%	13%	12%	12%	10%	13%	10%	11%	9%	16%	15%	13%	19%	12%	14%	13%	12%	13%	13%	19%	16%	15%	16%	15%	15%	16%	13%	15%	15%	14%	14%	14%	12%	12%	18%	32%	17%	19%	15%	14%	11%
Product_information_management	13.5%	13%	12%	16%	11%	11%	10%	7%	15%	21%	11%	12%	13%	11%	13%	10%	11%	9%	17%	15%	12%	17%	11%	12%	13%	11%	11%	17%	14%	14%	14%	15%	15%	21%	20%	15%	16%	17%	15%	19%	16%	15%	15%	27%	15%	16%	14%	12%	10%	
Data_management_platform	13.4%	12%	15%	15%	13%	9%	12%	8%	15%	12%	12%	13%	11%	11%	10%	11%	11%	9%	21%	14%	14%	14%	11%	11%	13%	9%	11%	11%	13%	13%	12%	10%	13%	35%	36%	19%	21%	23%	21%	23%	24%	22%	13%	13%	12%	11%	11%	10%	11%	
Multichannel_marketing	13.3%	16%	14%	12%	12%	13%	12%	10%	20%	15%	16%	14%	13%	13%	13%	9%	12%	18%	15%	18%	13%	15%	14%	13%	12%	11%	14%	19%	15%	13%	14%	13%	21%	16%	15%	12%	11%	15%	9%	14%	9%	15%	12%	10%	9%	10%	9%	7%		
Customer	13.3%	13%	12%	10%	9%	9%	8%	6%	18%	13%	12%	13%	12%	10%	11%	13%	10%	9%	16%	23%	20%	17%	18%	16%	11%	14%	11%	9%	15%	12%	13%	15%	15%	13%	23%	17%	18%	14%	11%	12%	11%	14%	11%	11%	14%	12%	14%	13%	11%	9%
User_journey	13.3%	14%	14%	13%	12%	11%	11%	8%	16%	13%	12%	16%	12%	10%	11%	13%	11%	10%	15%	20%	19%	14%	16%	15%	12%	14%	11%	10%	15%	13%	13%	14%	15%	13%	22%	18%	18%	14%	12%	14%	12%	14%	11%	13%	13%	11%	12%	11%	11%	10%
Marketing_accountability	13.2%	15%	14%	12%	13%	13%	12%	7%	23%	16%	16%	13%	10%	14%	13%	11%	8%	9%	23%	11%	17%	14%	12%	13%	13%	11%	10%	18%	19%	17%	14%	13%	10%	14%	23%	20%	15%	14%	13%	19%	10%	16%	11%	18%	12%	12%	9%	10%	9%	9%
Retail_marketing	13.1%	14%	13%	11%	10%	10%	8%	8%	18%	14%	14%	13%	12%	11%	11%	12%	11%	9%	14%	17%	18%	15%	15%	11%	13%	10%	13%	18%	13%	14%	16%	17%	19%	20%	14%	16%	13%	11%	13%	9%	13%	10%	14%	17%	11%	11%	10%	10%	10%	
Customer_attrition	13.0%	13%	12%	10%	9%	9%	8%	6%	17%	11%	12%	13%	12%	10%	10%	12%	11%	9%	16%	24%	20%	17%	18%	17%	11%	14%	10%	7%	15%	10%	13%	15%	14%	12%	25%	18%	19%	15%	11%	13%	12%	14%	12%	10%	13%	11%	12%	12%	10%	12%
Customer_retention	12.8%	13%	11%	9%	9%	8%																																												

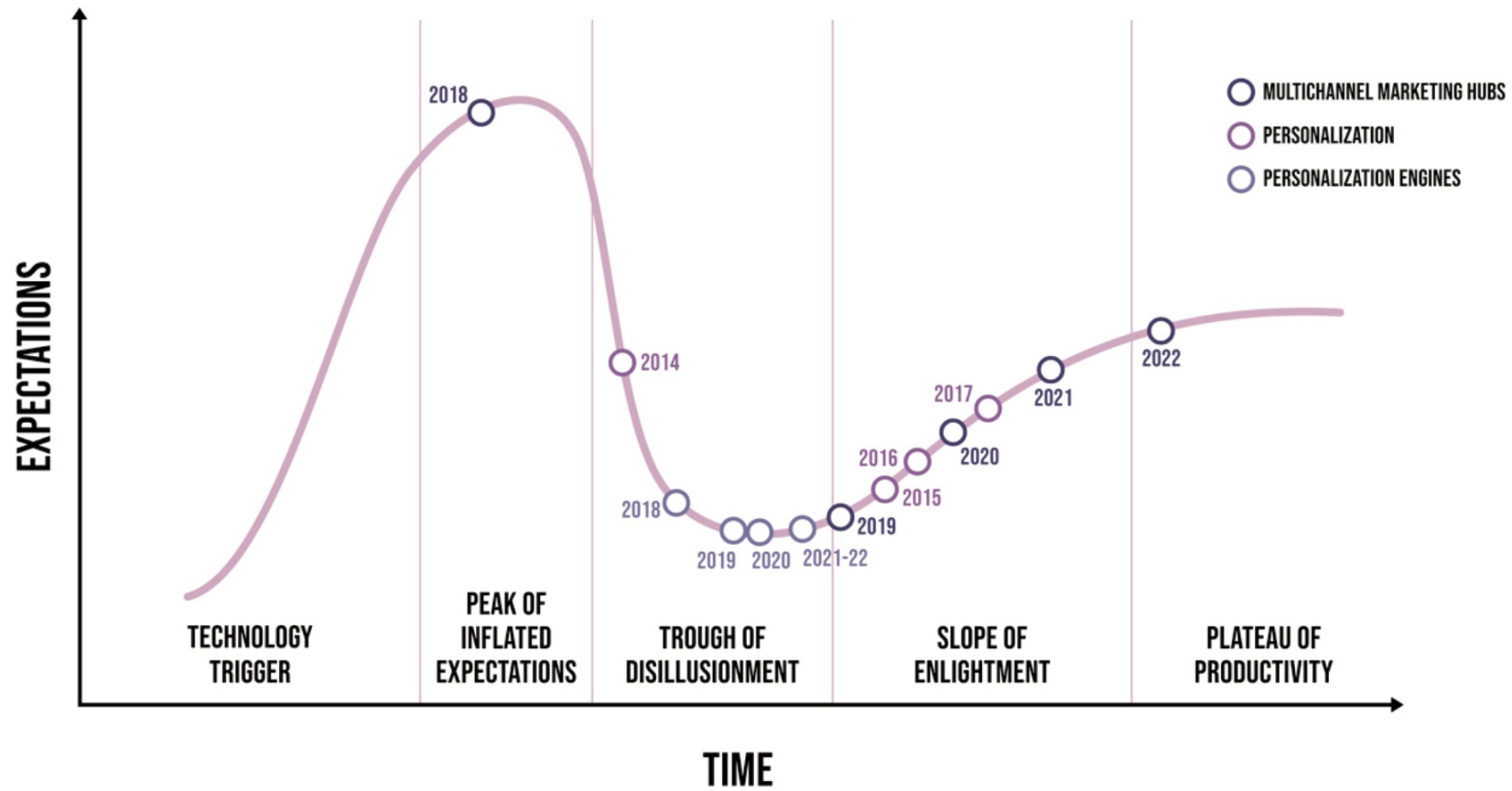


Figure 3. Personalization, personalization engines, and multichannel marketing hubs are moving forwards on Gartner's Hype Cycle for Digital Marketing.

EXPLICIT PERSONALIZATION: PAID MEDIA	CREEPY/HIGH RISK	CREEPY/HIGH RISK	CREEPY/HIGH RISK
EXPLICIT PERSONALIZATION: OWNED MEDIA	OK	CONSIDER TRUST VS AUDIENCE	CREEPY/HIGH RISK
IMPLICIT PERSONALIZATION	OK	OK	OK
	ZERO-PARTY DATA DESCRIPTIVE	FIRST-PARTY DATA DETERMINISTIC	THIRD-PARTY DATA PROBABILISTIC

Figure 4. The data types used for personalization and their impact on how consumers perceive creepiness.

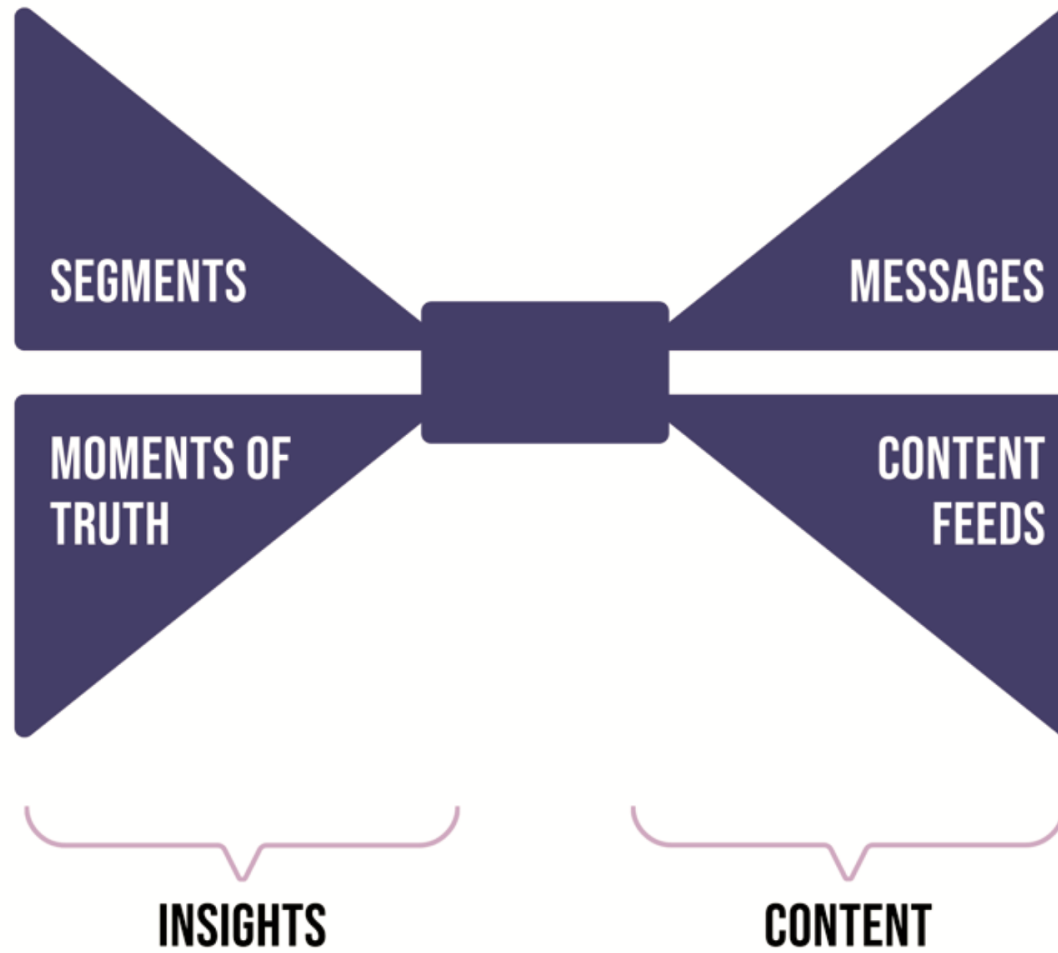


Figure 5. The Bowtie of Personalization

**A MESSAGE WITH MULTIPLE
VARIANTS PER SEGMENT AND
MULTIPLE PROPERTIES TO
ACCOMMODATE USAGE ACROSS
DIFFERENT CHANNELS.**

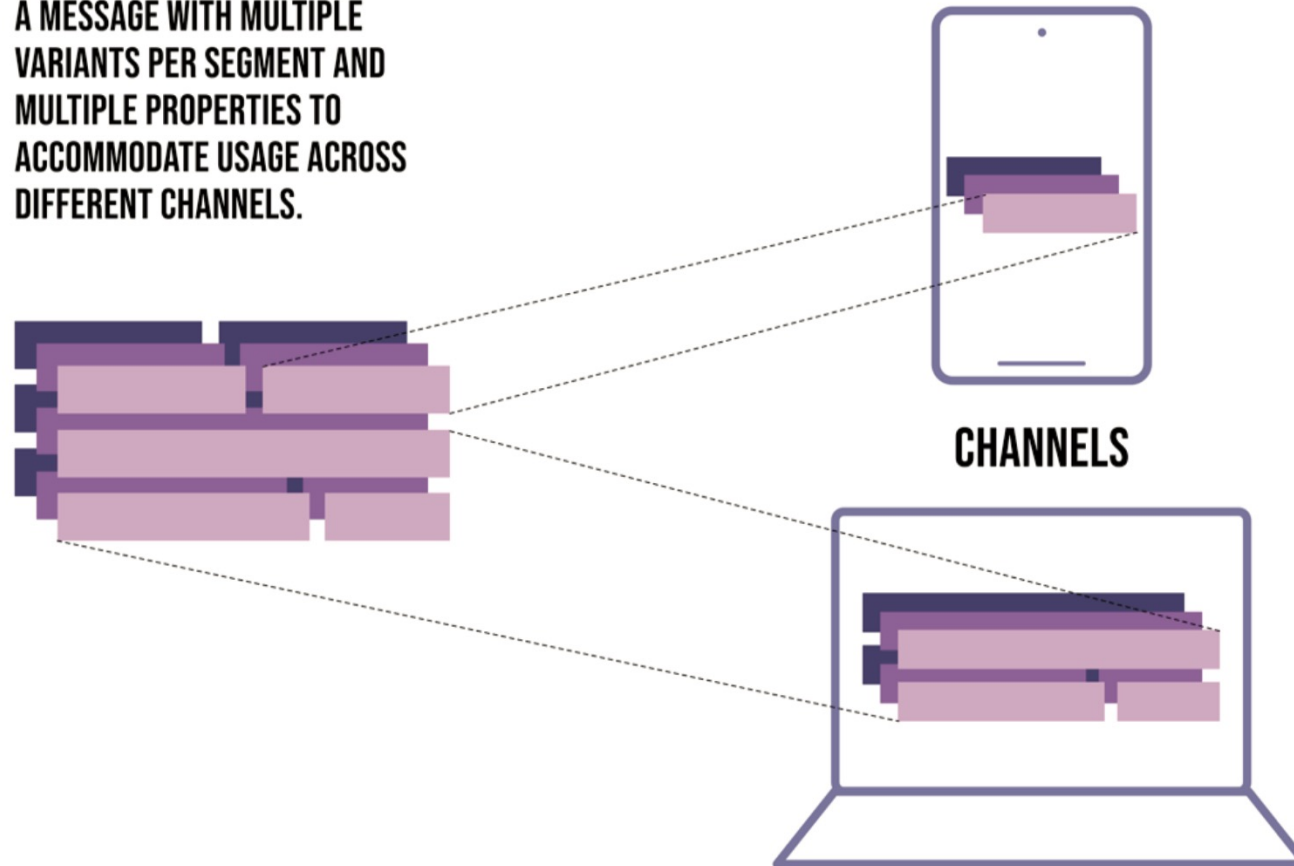


Figure 6. Ideally, personalization happens before a message is applied to a specific channel; the message will appear differently in each channel.

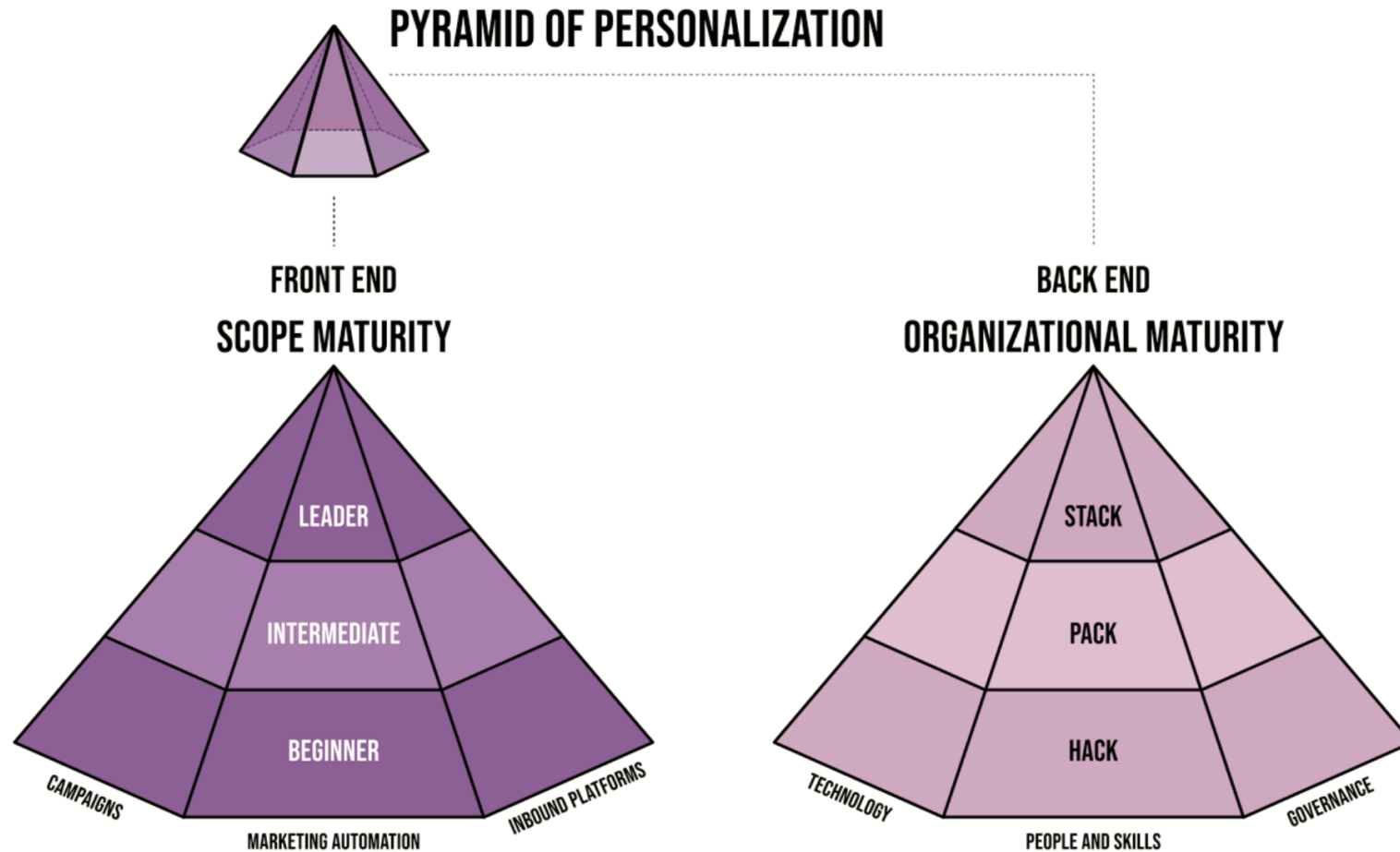


Figure 7. The front end and back end of the Pyramid of Personalization.

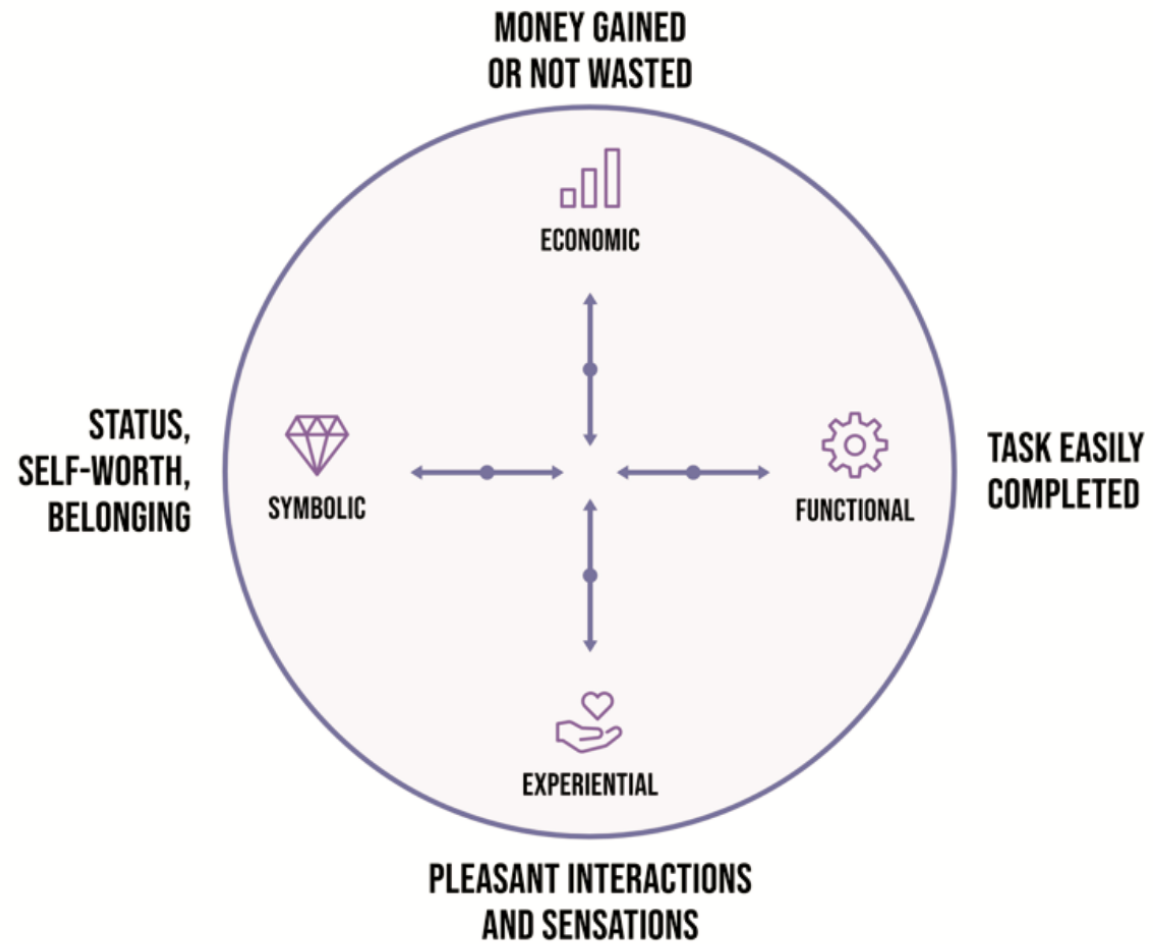


Figure 8. Forrester Research's four value dimensions.

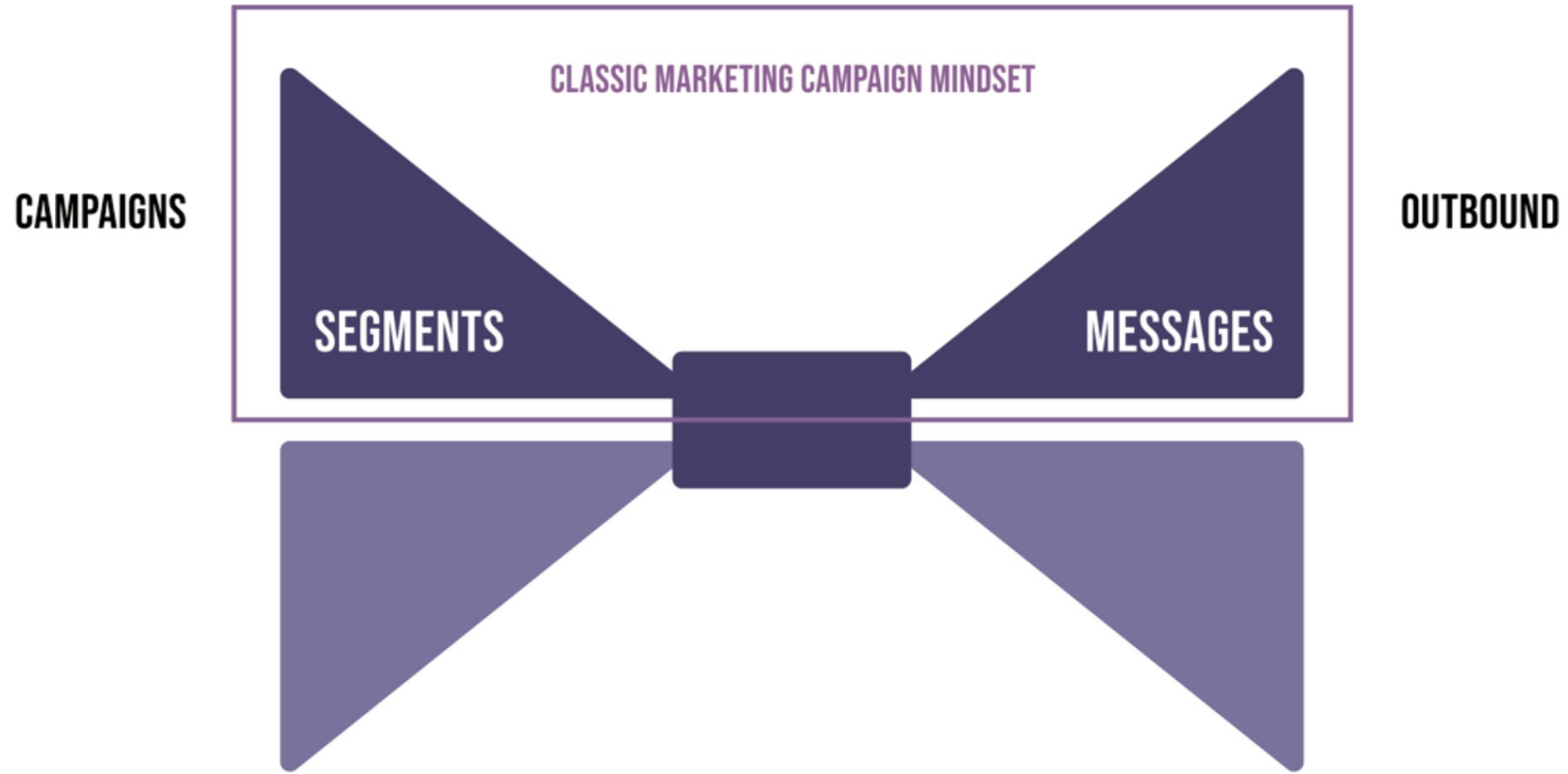
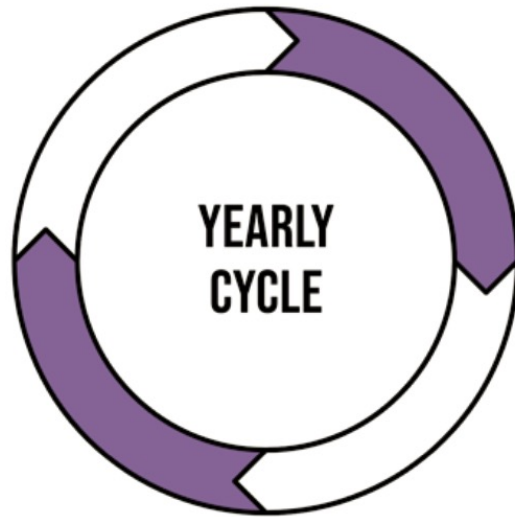
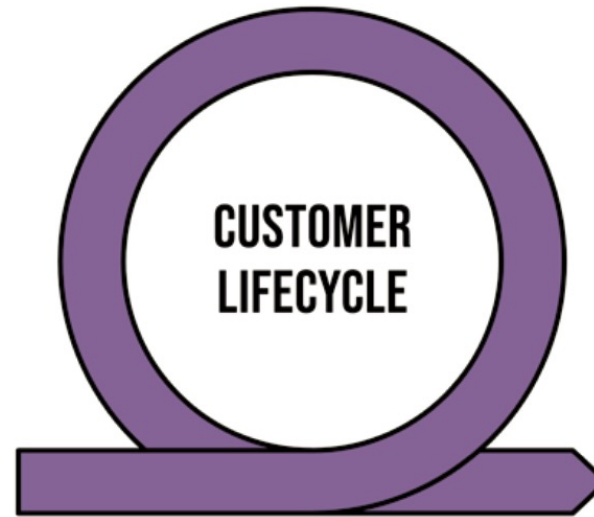


Figure 9. The top of the Bowtie of Personalization captures the essence of working with personalization in campaigns.

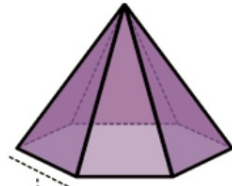


CAMPAIGNS



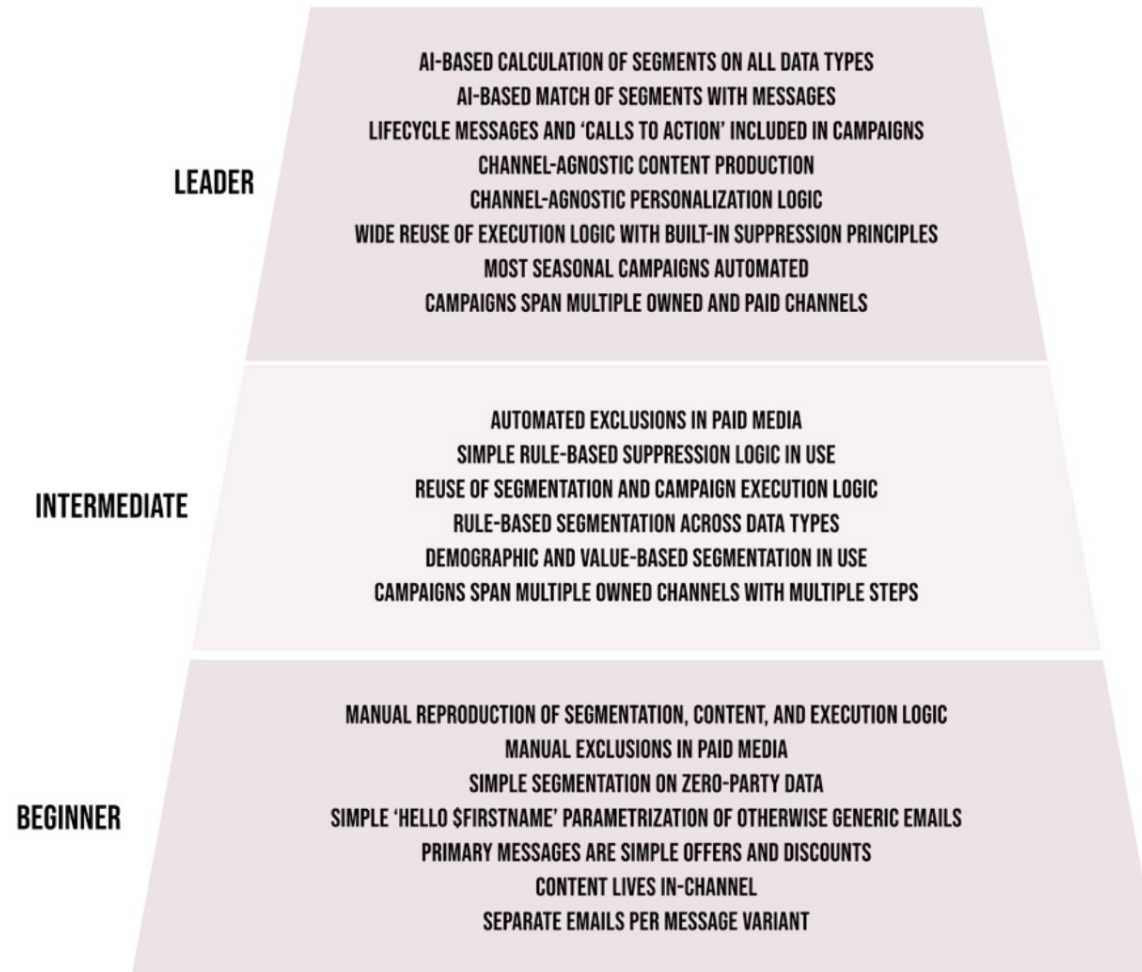
DATA DRIVEN

Figure 10. How campaigns diverge from data-driven customer lifecycle communication.



PYRAMID OF PERSONALIZATION - FRONT END SCOPE MATURITY

CAMPAIGNS



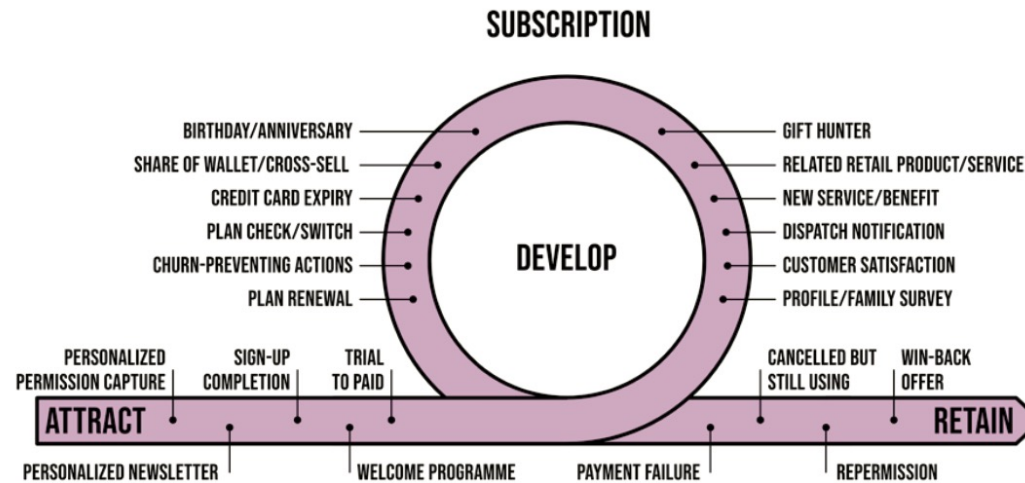
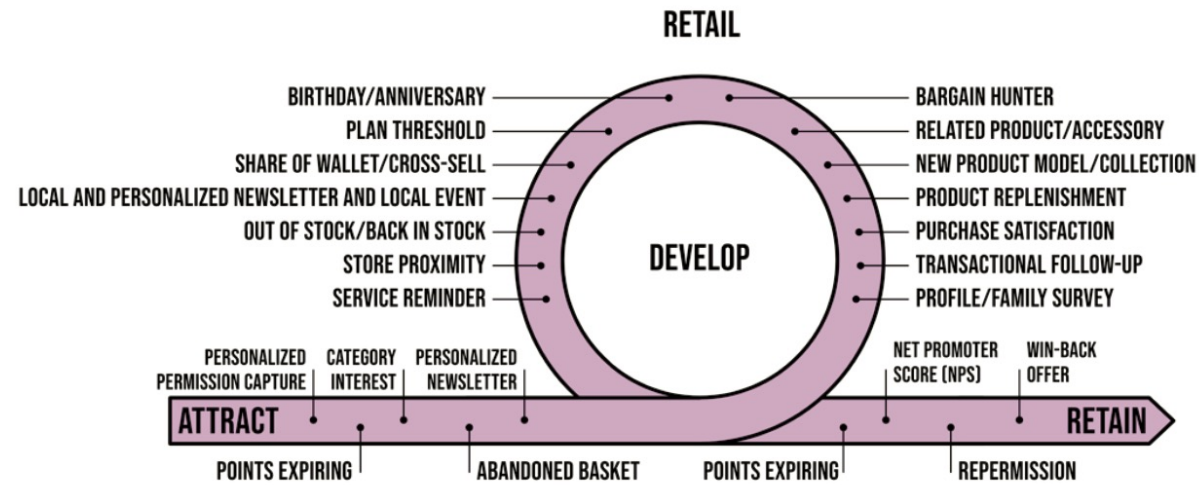


Figure 11. Examples of typical moments of truth in a retail and a subscription customer lifecycle. Source: *Make It All About Me*, Houliind & Shearer, 2019.

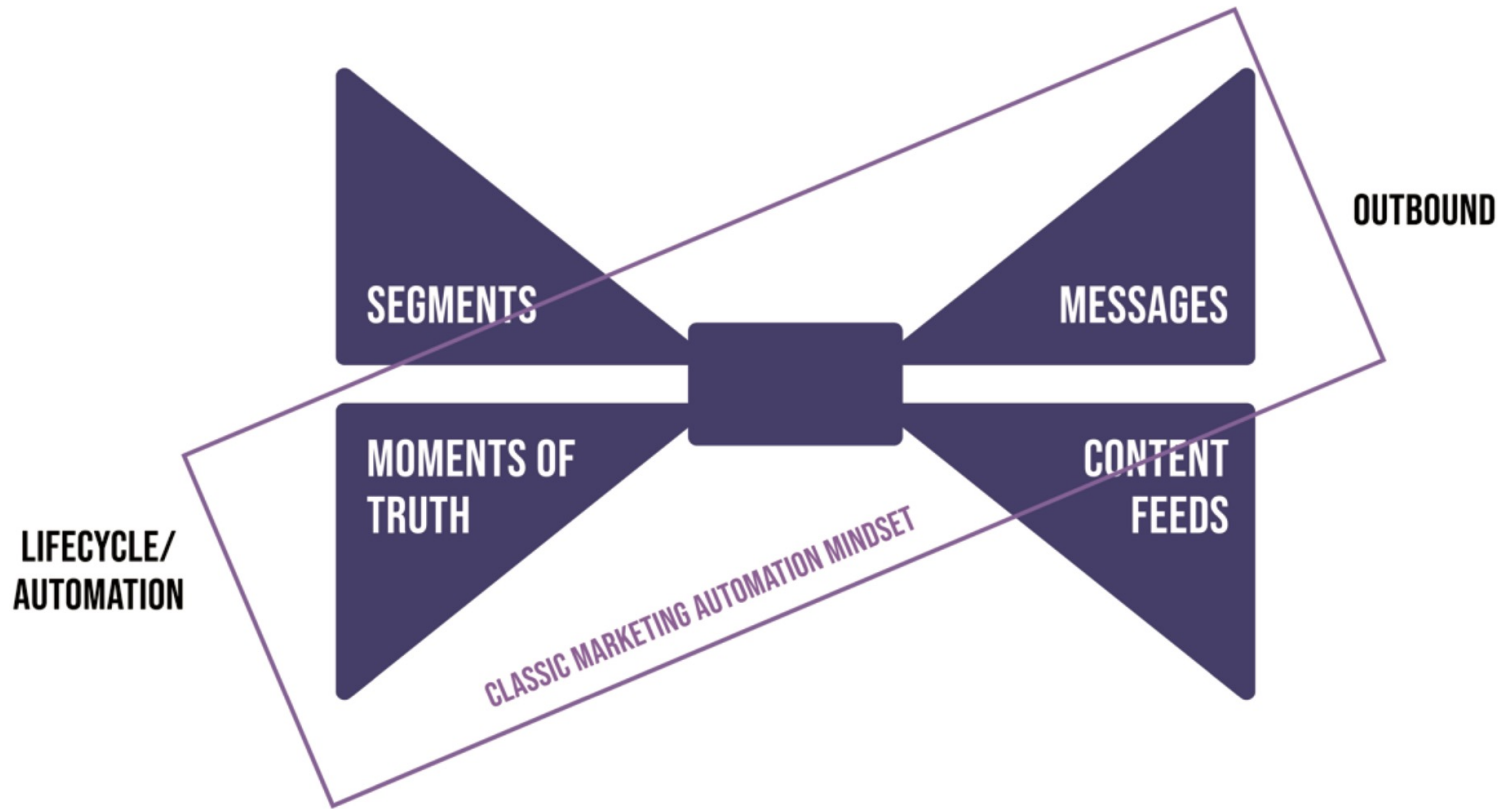


Figure 12. Marketing automation: matching moments of truth with messages that make a positive difference for the customer and your business.

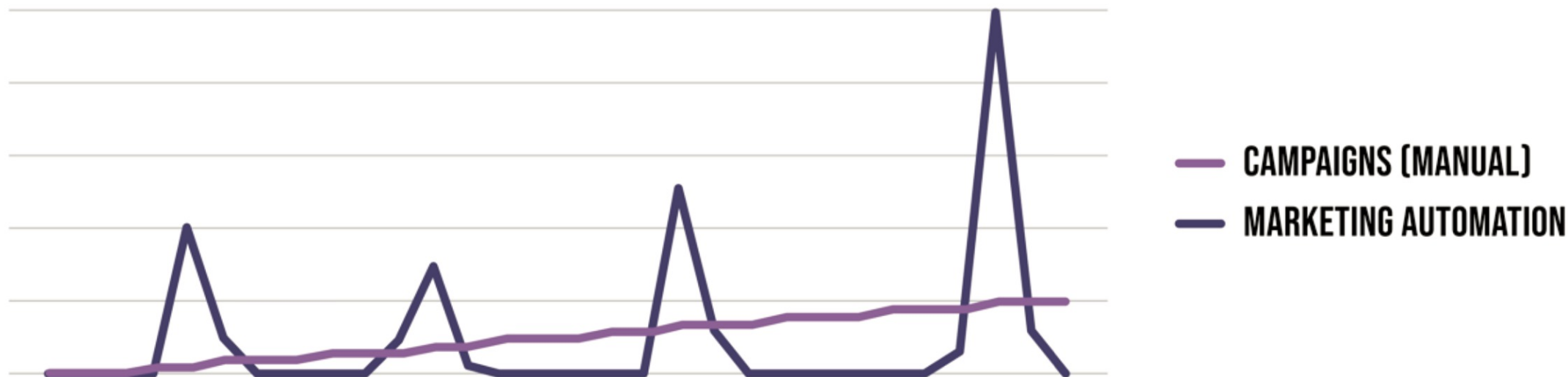
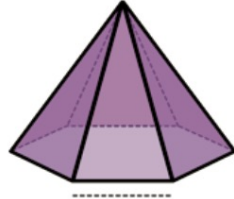


Figure 13. Value from marketing automation builds up incrementally as more automated flows are launched; value from campaigns is concentrated around blockbuster occasions.



PYRAMID OF PERSONALIZATION - FRONT END SCOPE MATURITY

MARKETING AUTOMATION



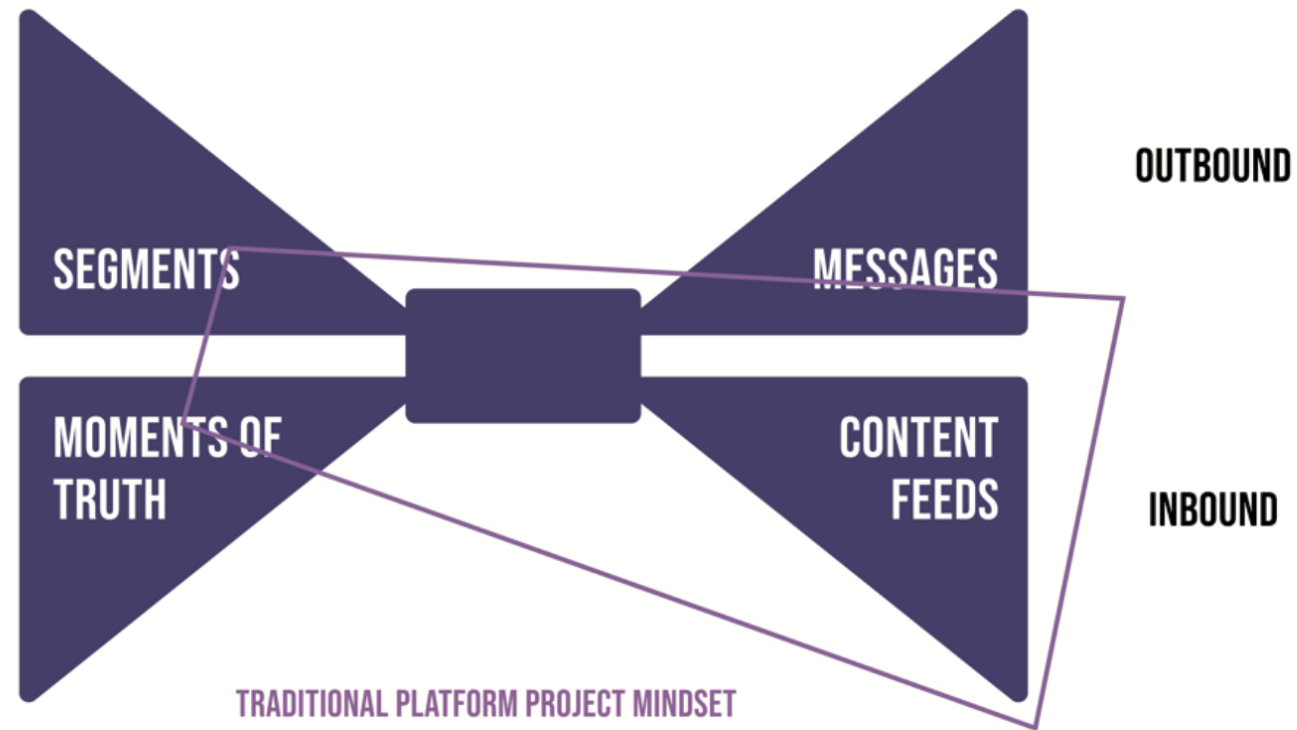
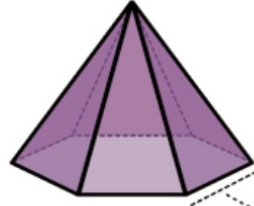
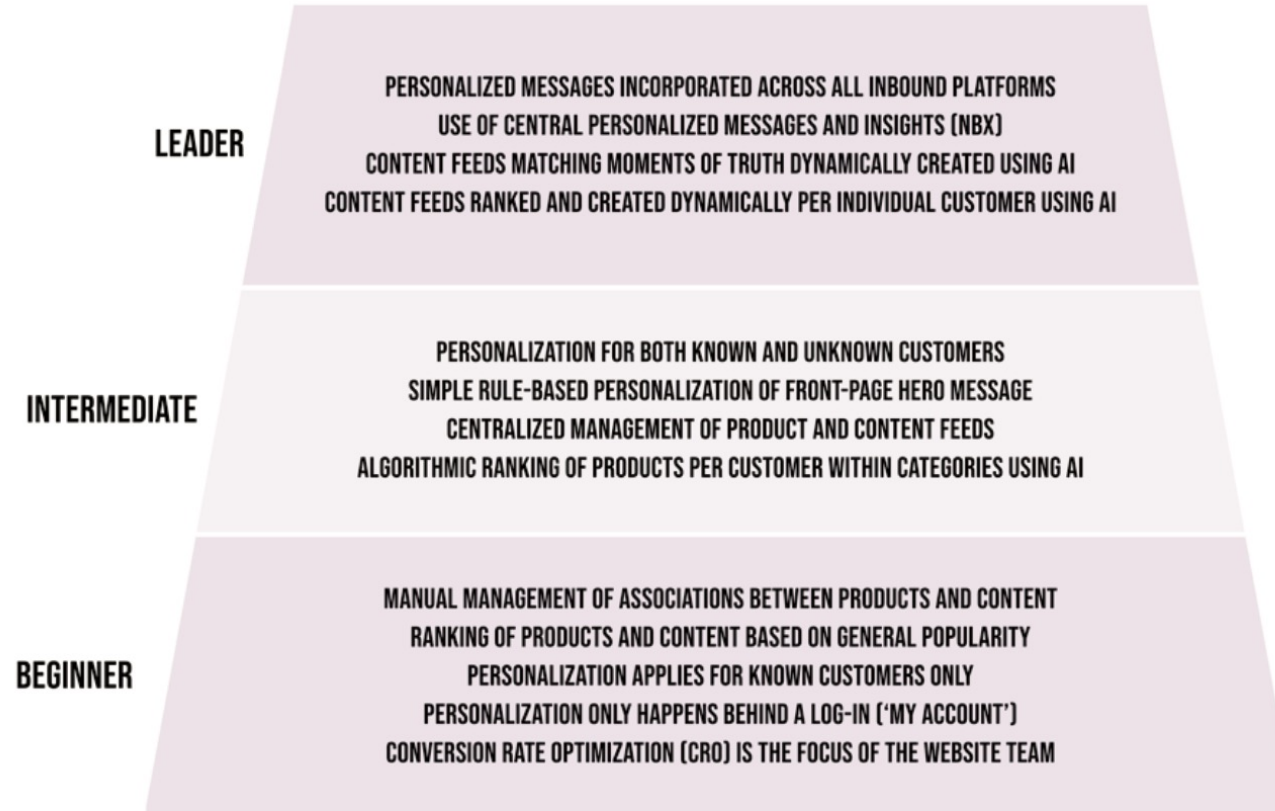


Figure 14. The structure of inbound platforms relates closely to the Bowtie of Personalization; personalization on inbound platforms normally starts with content feeds.



PYRAMID OF PERSONALIZATION - FRONT END SCOPE MATURITY

INBOUND PLATFORMS



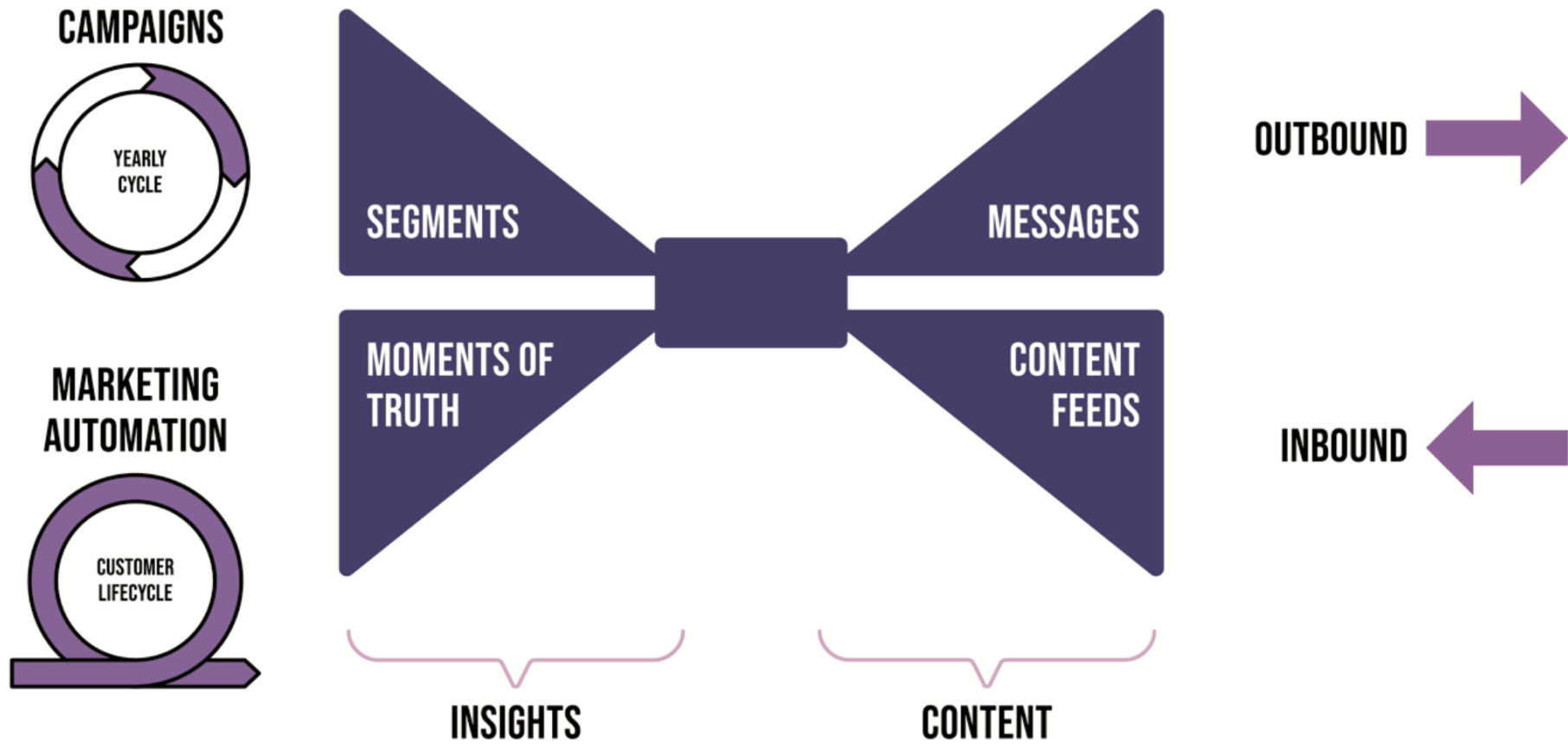


Figure 15. Each corner of the bowtie has its primary use case.

TYING IT ALL UP IN THE BOWTIE OF PERSONALIZATION

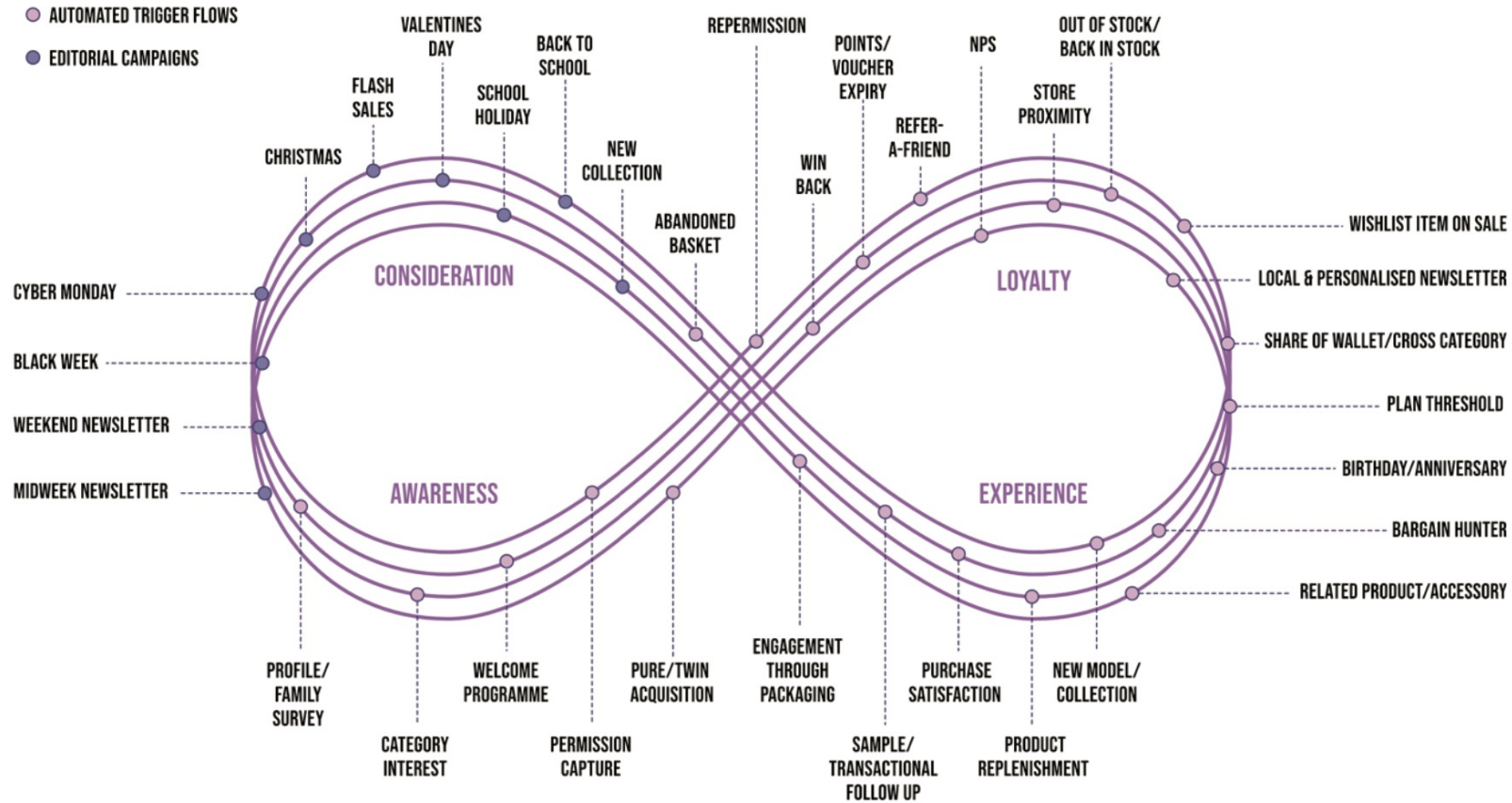


Figure 16. Typical retail customer journey from 'Awareness' to 'Consideration', 'Experience', and 'Loyalty'; along the way, a customer experiences marketing and communication from both campaigns and marketing automation.

PYRAMID OF PERSONALIZATION - FRONT END
SCOPE MATURITY

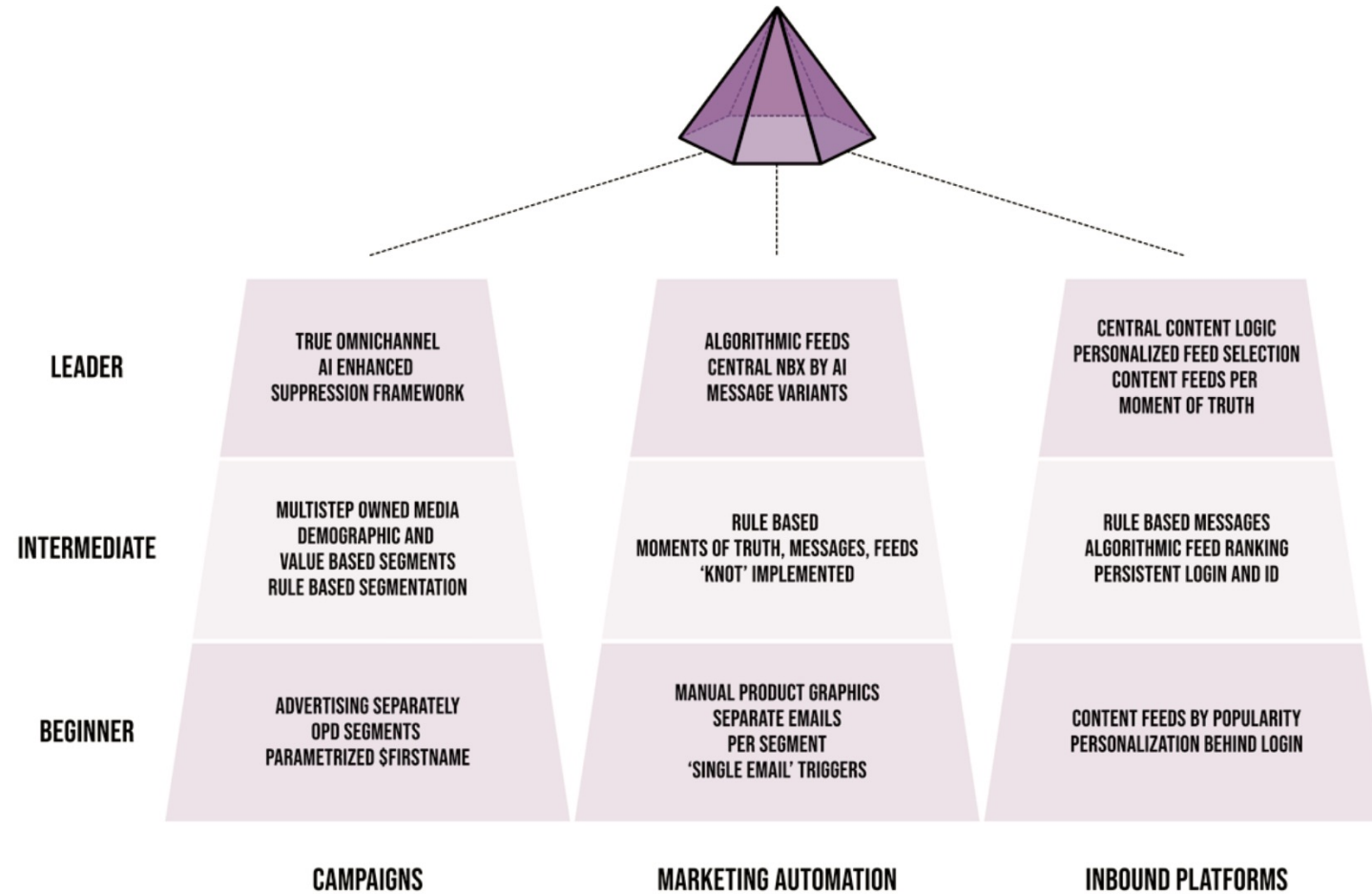


Figure 17. The front end of the Pyramid of Personalization.

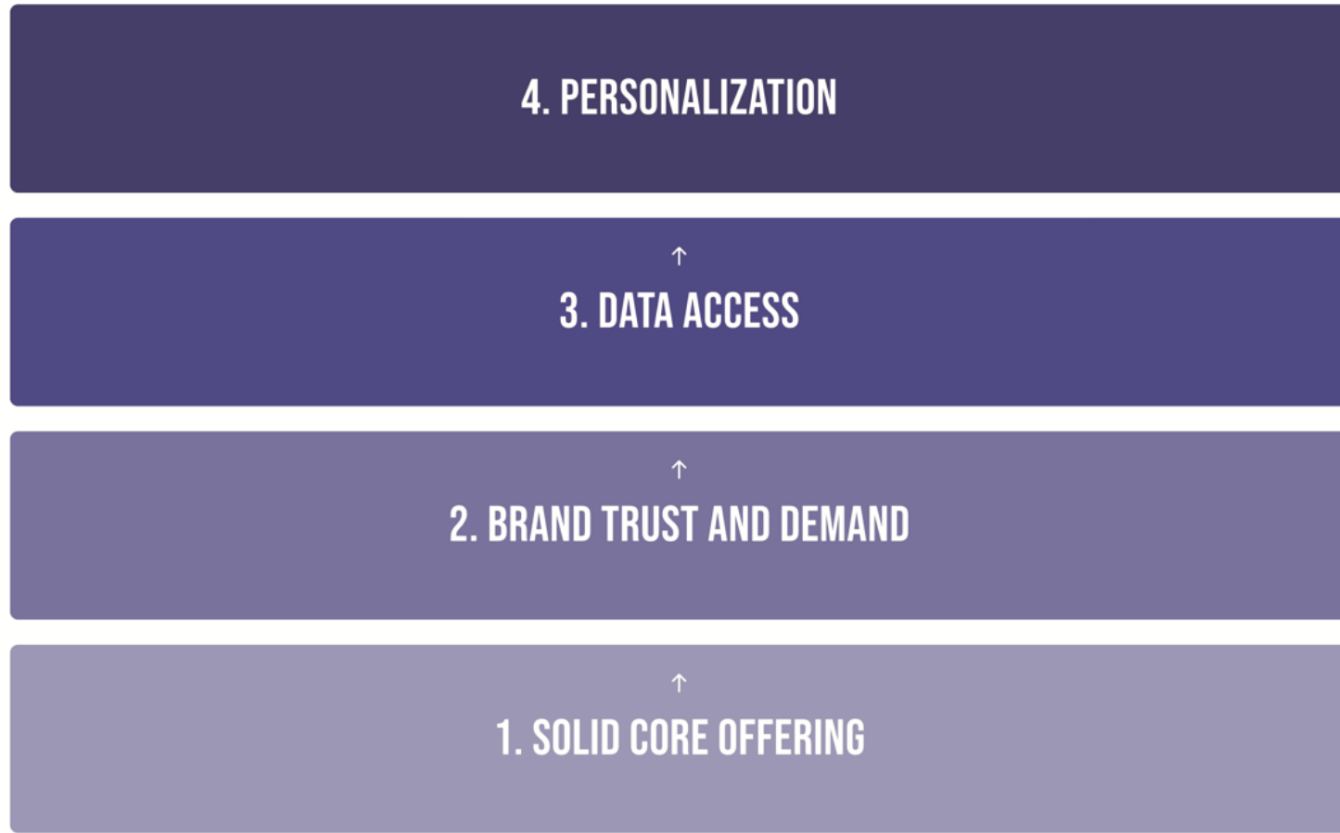


Figure 18. Personalization requires that your core offering is in place, you have established brand trust and demand, and you have access to plentiful customer data.

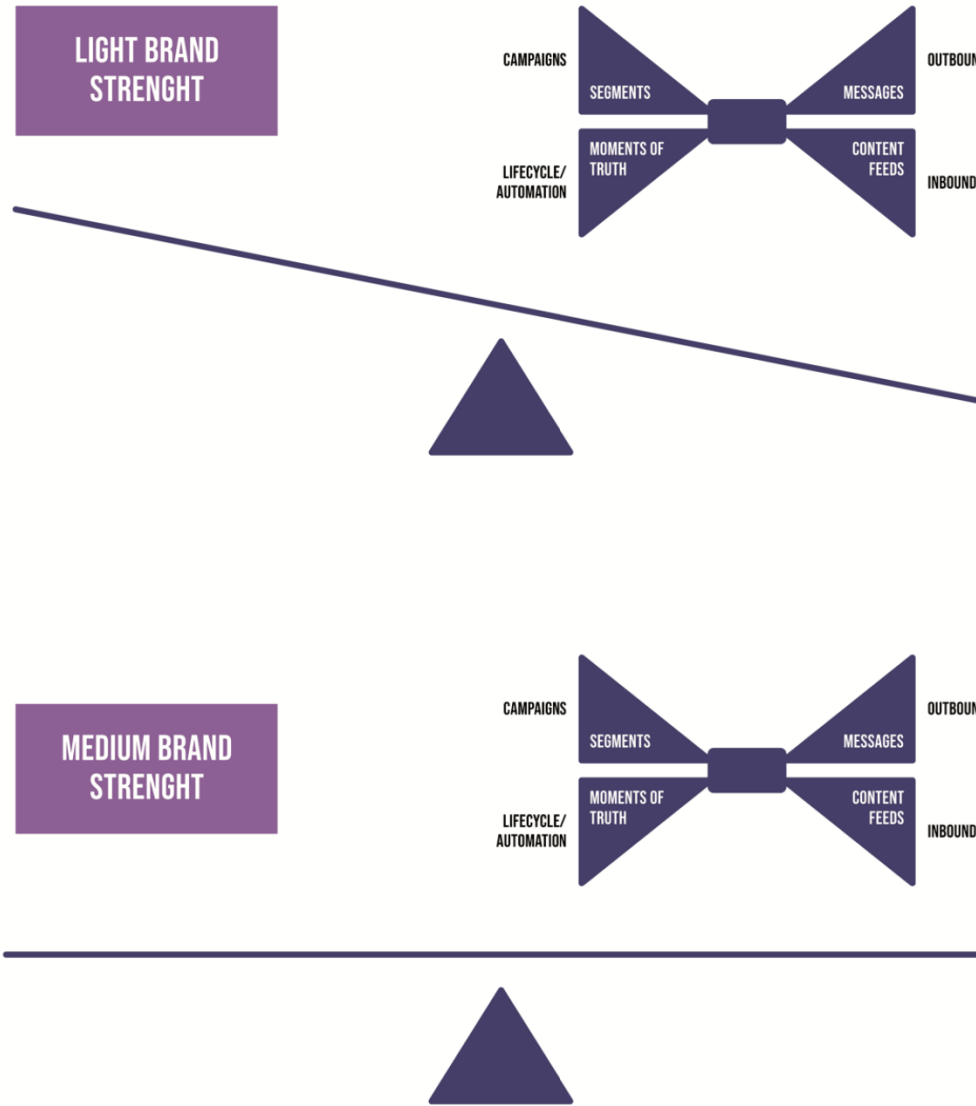


Figure 19. A strong brand brings great leverage to your personalization efforts; before brand strength is created, personalization makes little difference.

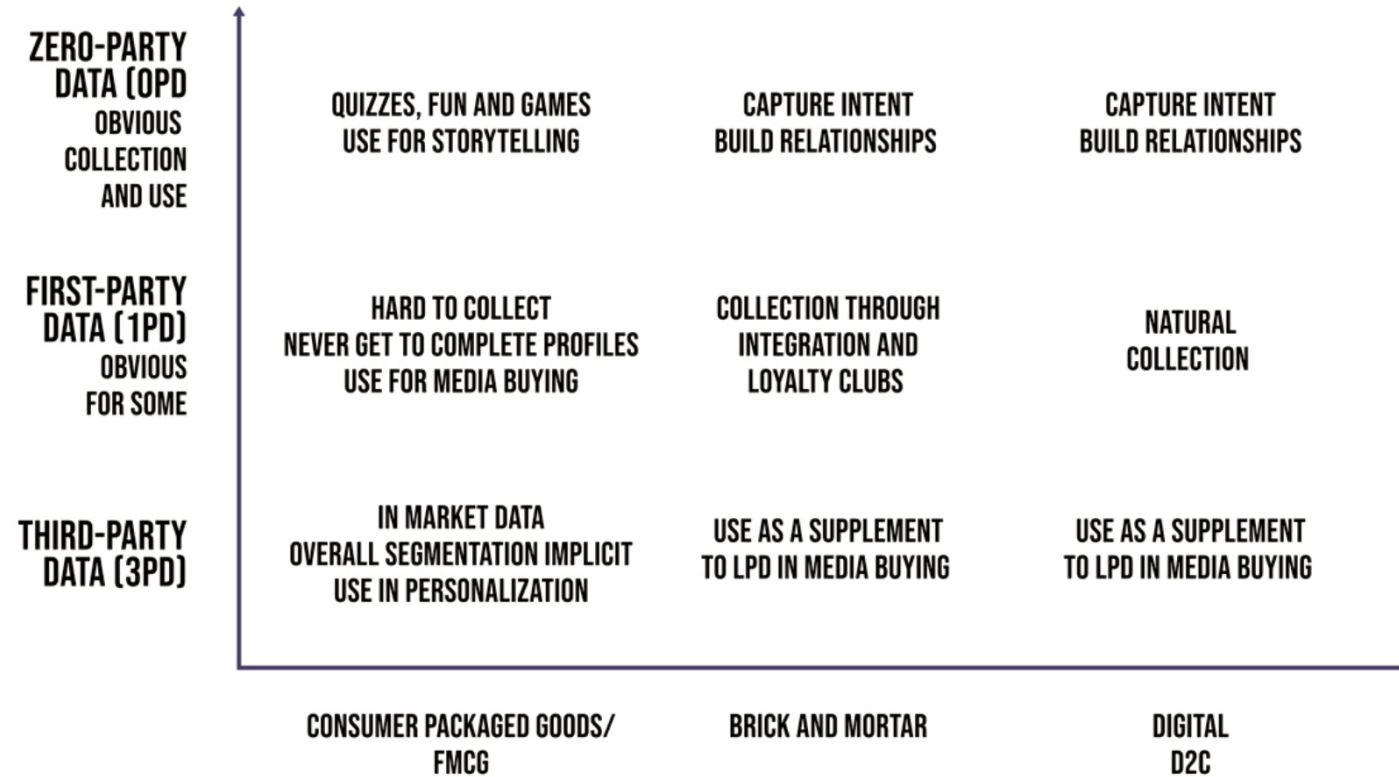


Figure 20. Brands from different industries have varying opportunities for collecting and using customer data (see definitions of zero-party (ZPD), first-party (1PD), and third-party (3PD) data in the paragraph on ‘data types’ below).

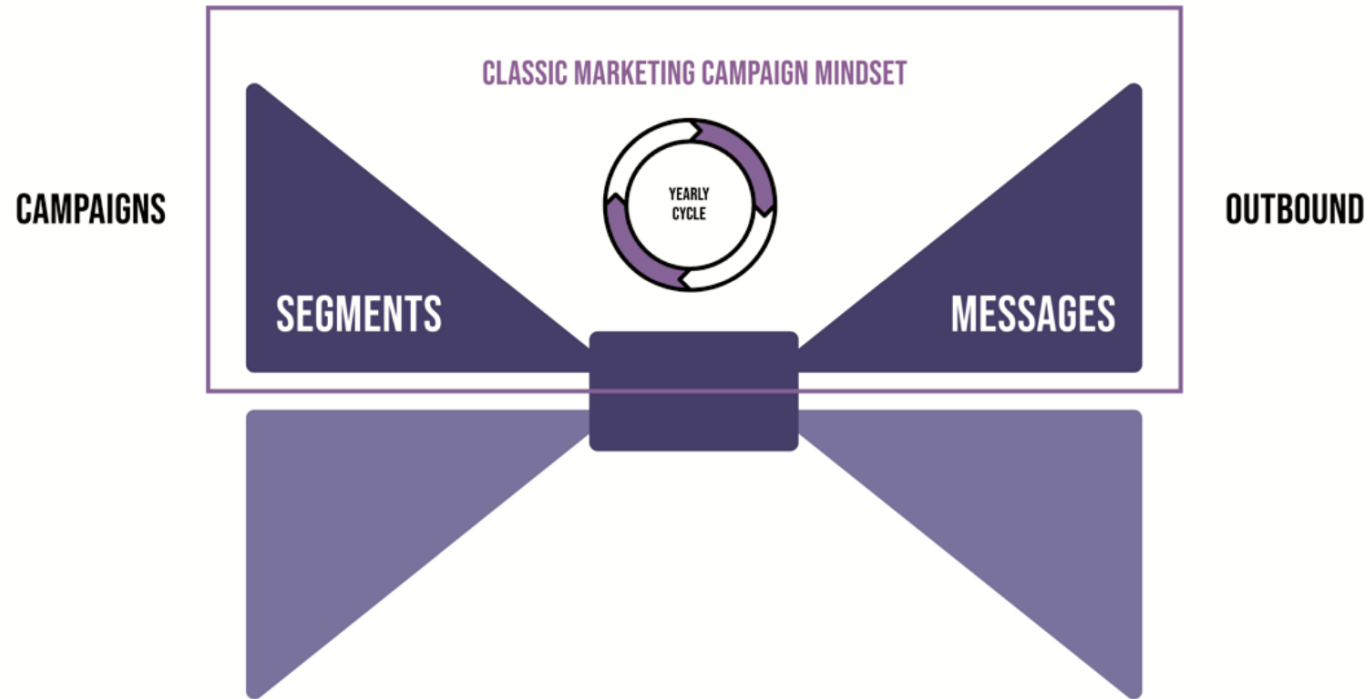


Figure 21. Classic FMCG is stuck in the upper part of the Bowtie of Personalization.

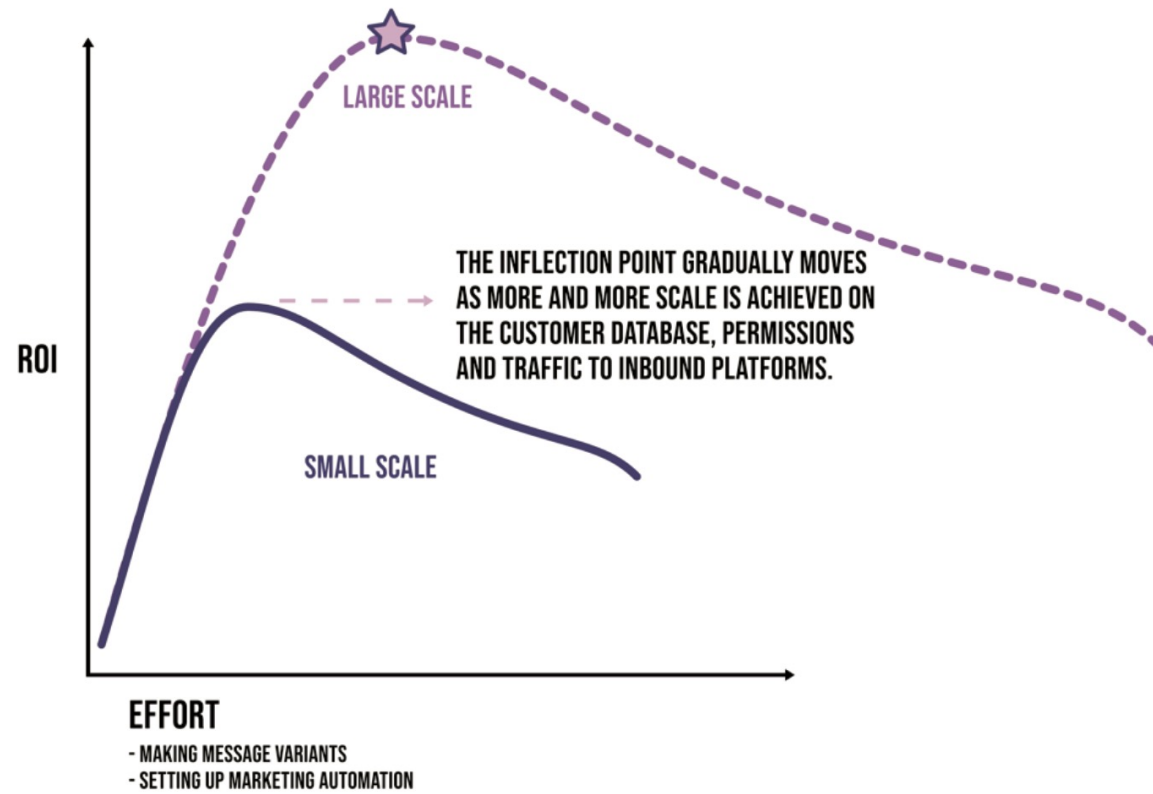


Figure 22. The additional effect of personalization is highly dependent on the scale of your database: the larger the database, the more you can justify investing in personalization.

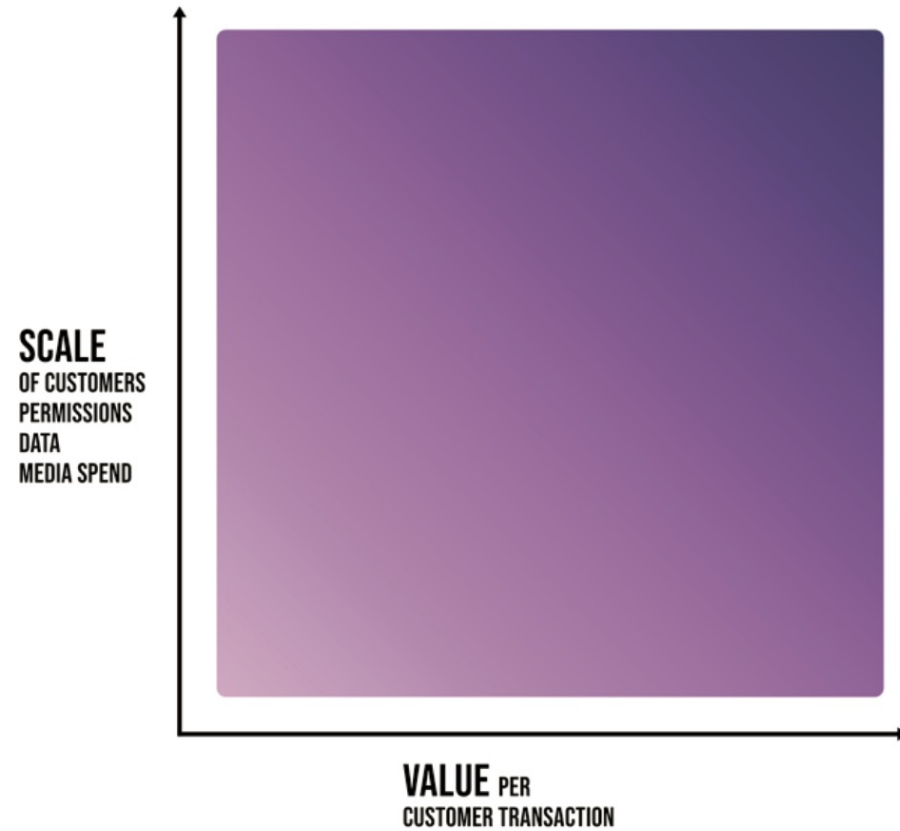


Figure 23. The combination of Scale of your database and Value per transaction is a determining factor for deciding if personalization is profitable.

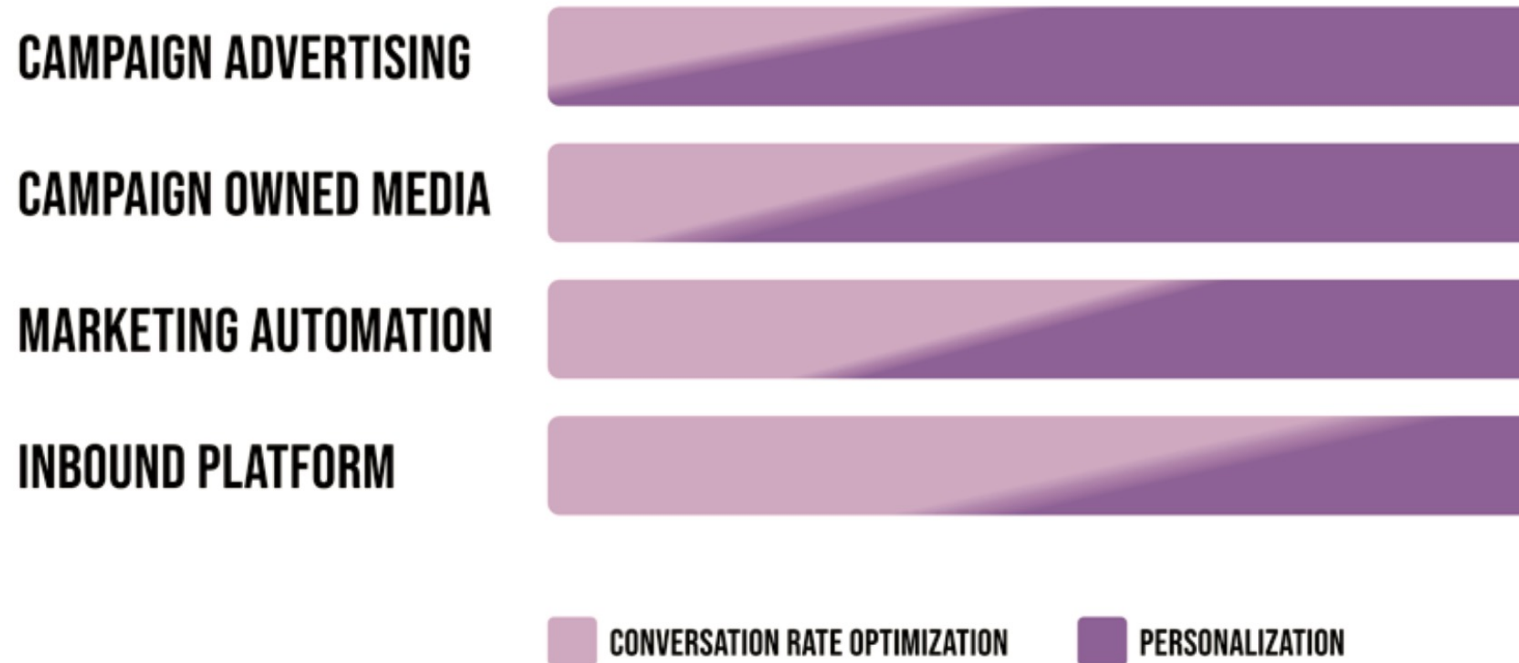


Figure 24. The moment to switch from optimizing the general experience to personalizing the specific experience varies between the marketing disciplines.

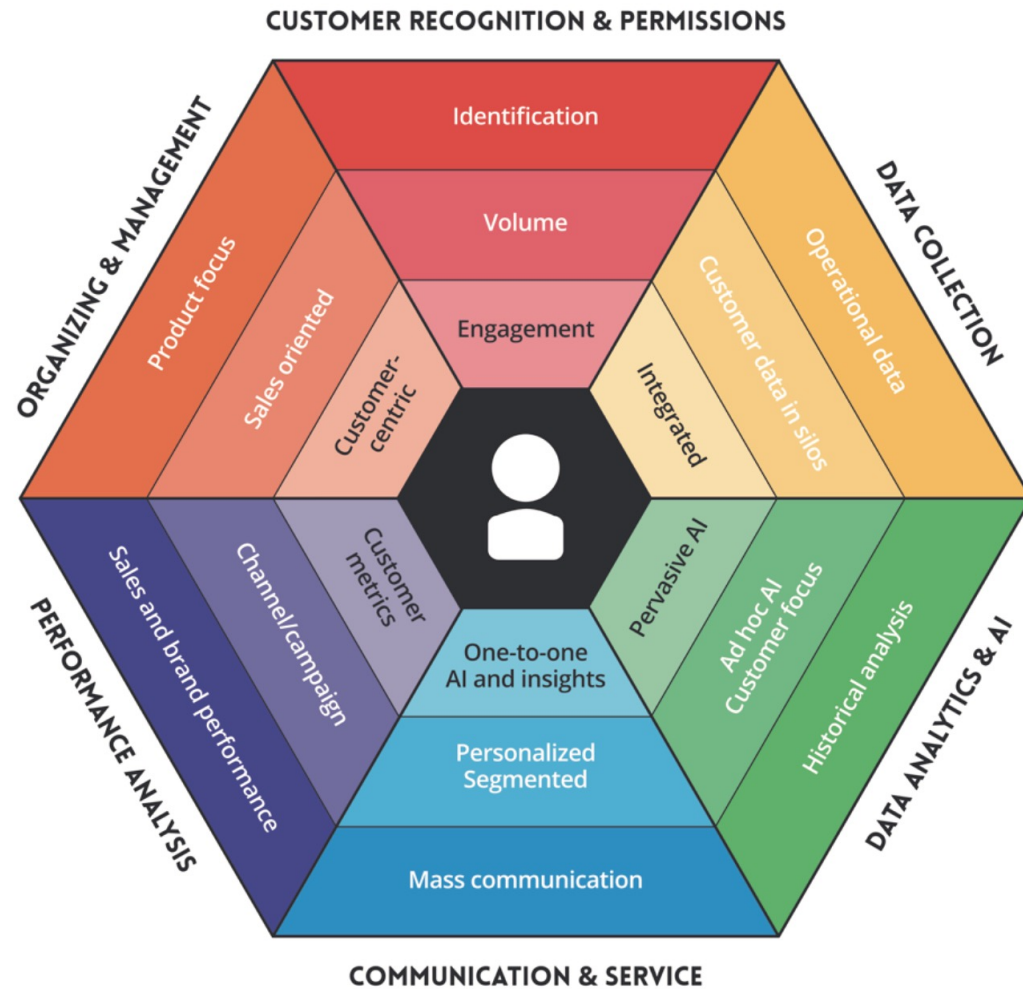


Figure 25. The Omnichannel Hexagon: a maturity model for evaluating omnichannel marketing maturity.



Figure 26. The omnichannel marketing maturity assessment by Forrester Consulting.

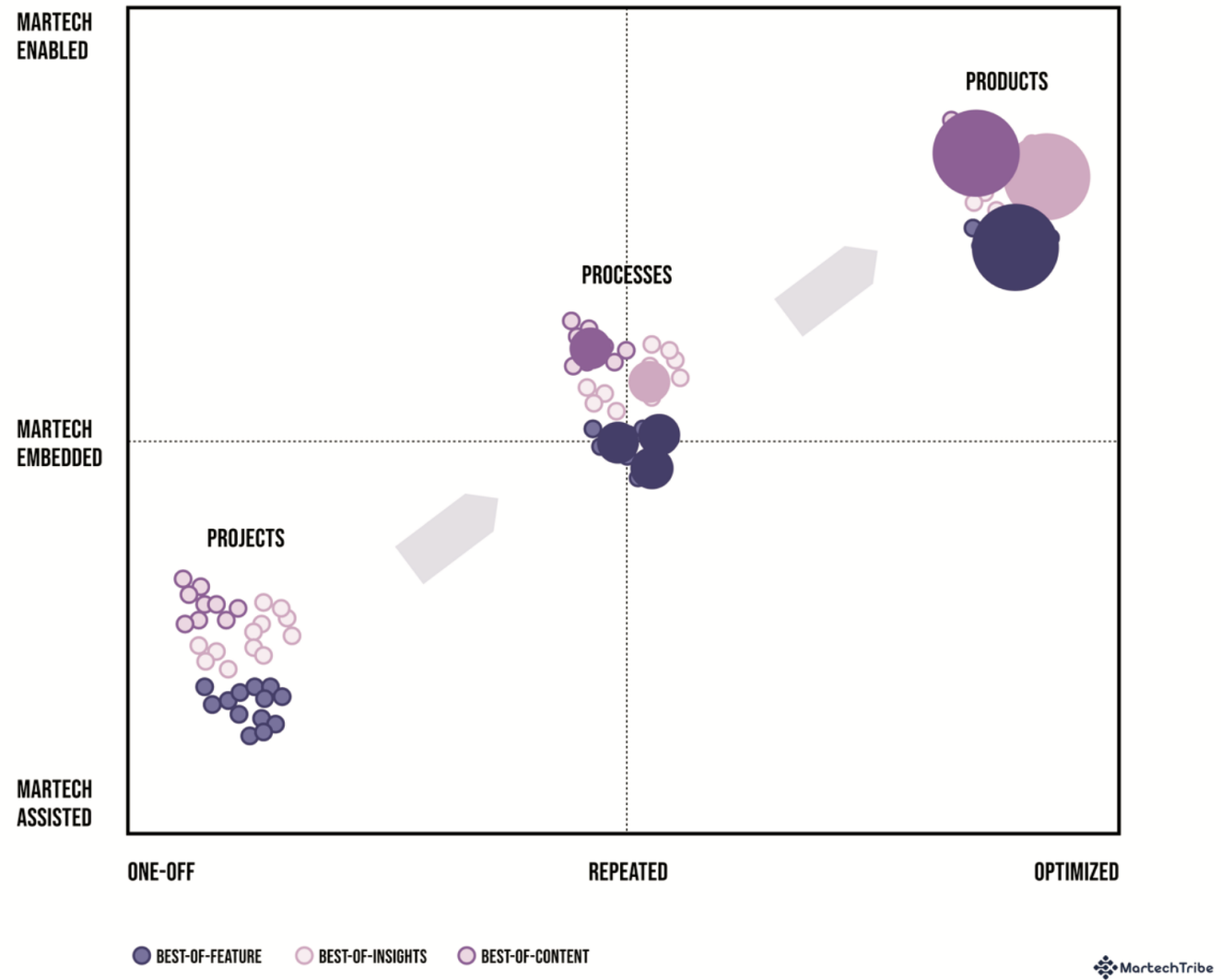


Figure 27. Productizing marketing.

PYRAMID OF PERSONALIZATION - BACK END ORGANIZATIONAL MATURITY

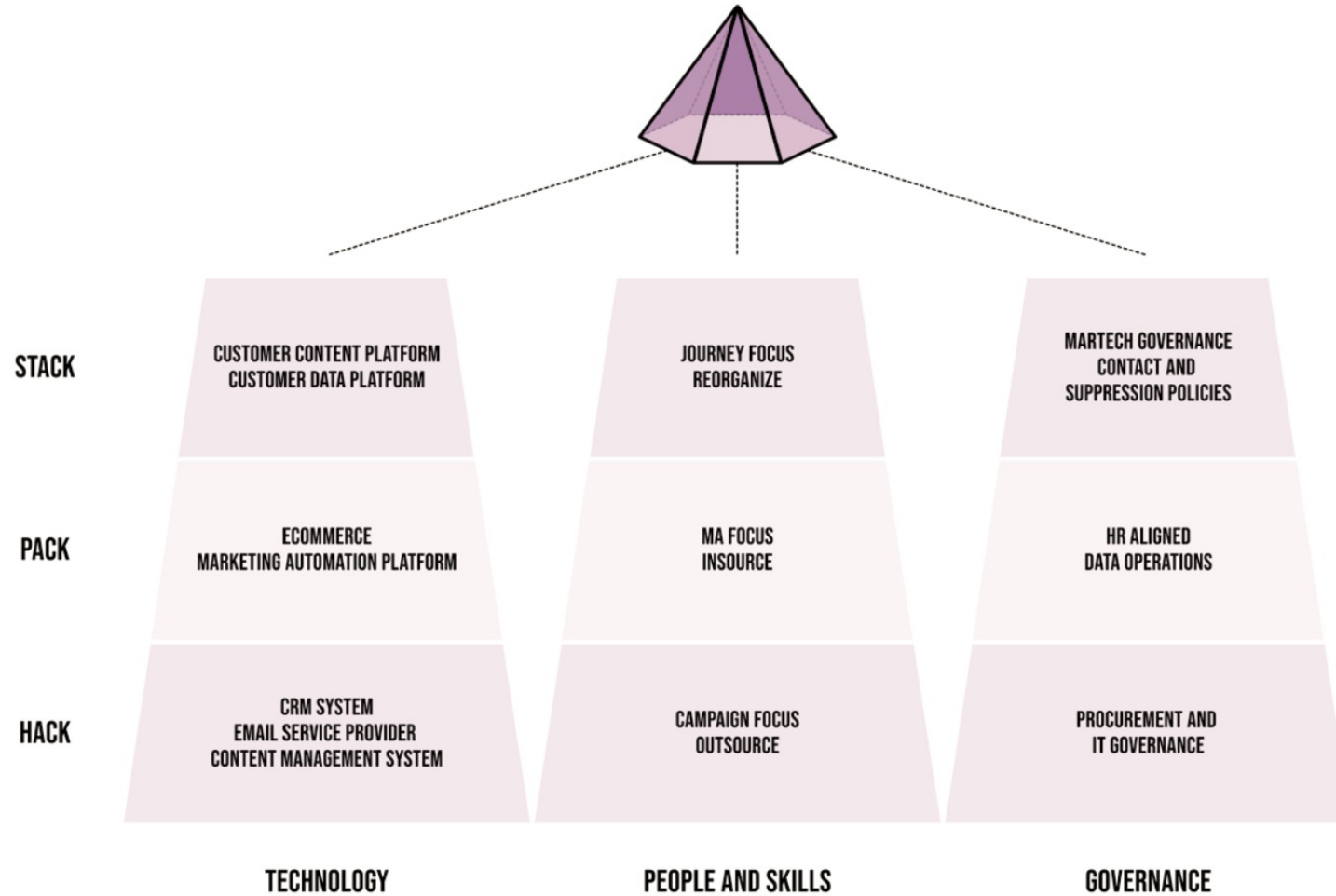


Figure 28. The back end of the Pyramid of Personalization: how to organize optimally for personalization.

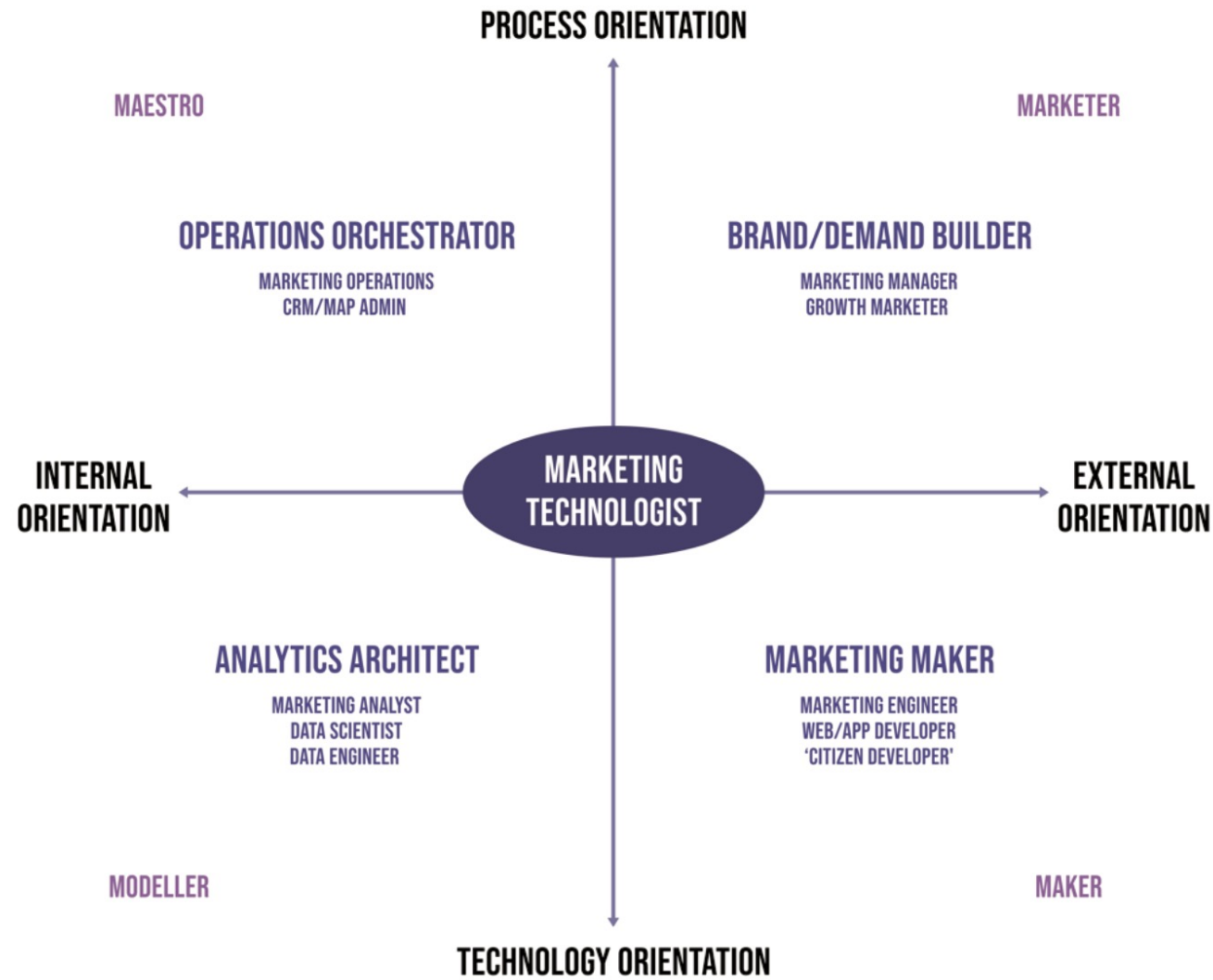


Figure 29. Scott Brinker's four archetypes/roles of marketing technologists.

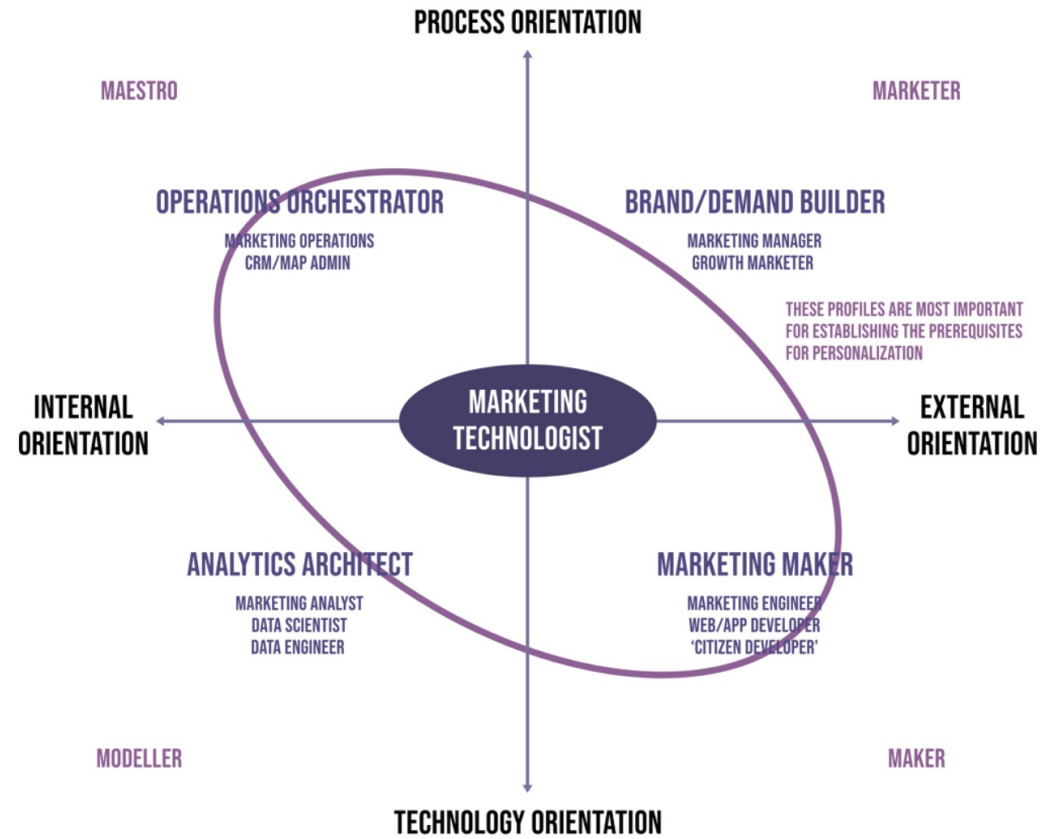


Figure 30. Skills needed to build the foundation for personalization are mainly from the Maestro and the Maker archetypes.

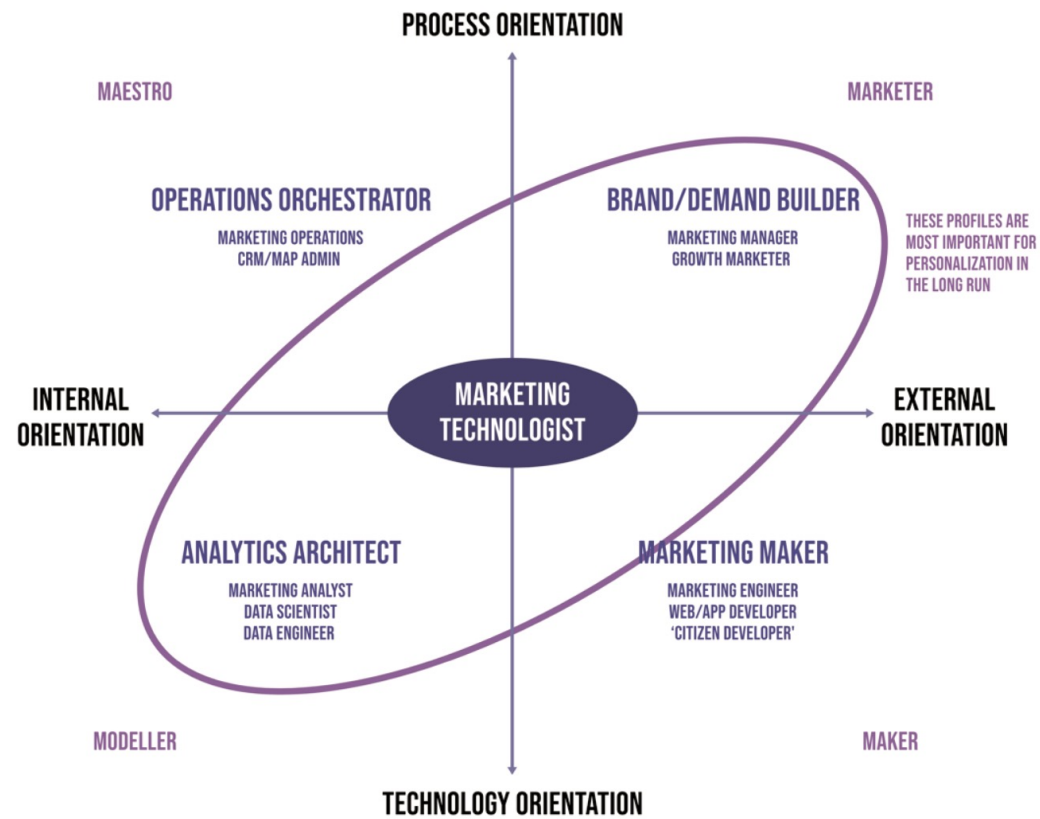


Figure 31. Skills needed to execute personalized marketing from an already existing foundation are mainly from the Marketer and Modeller archetypes.

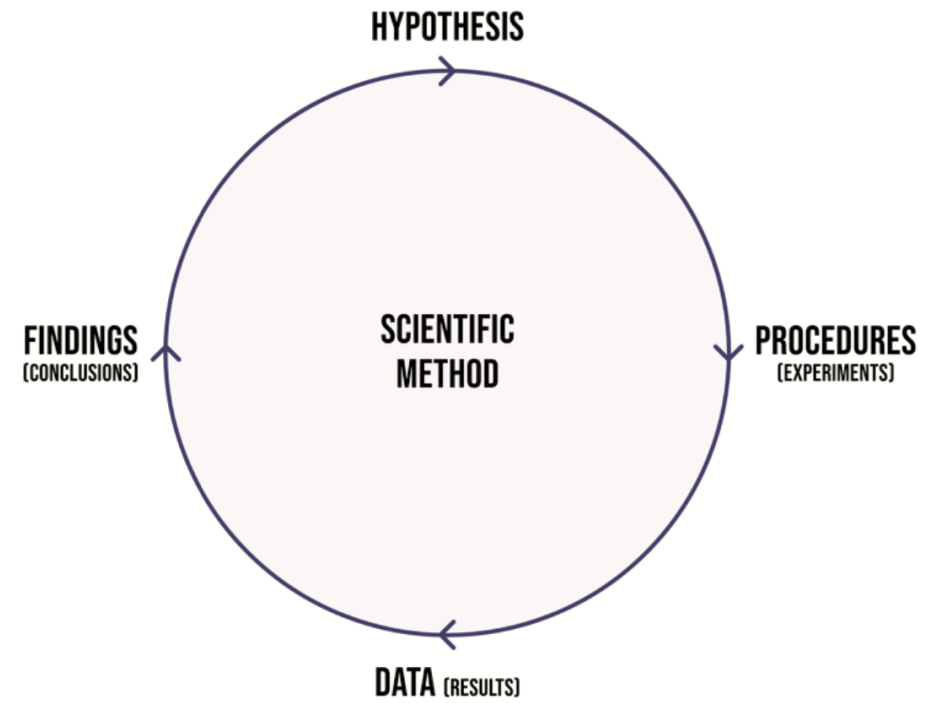


Figure 32. Netflix's agile operating model for continuously improving their product offering, including their marketing and retention communication.

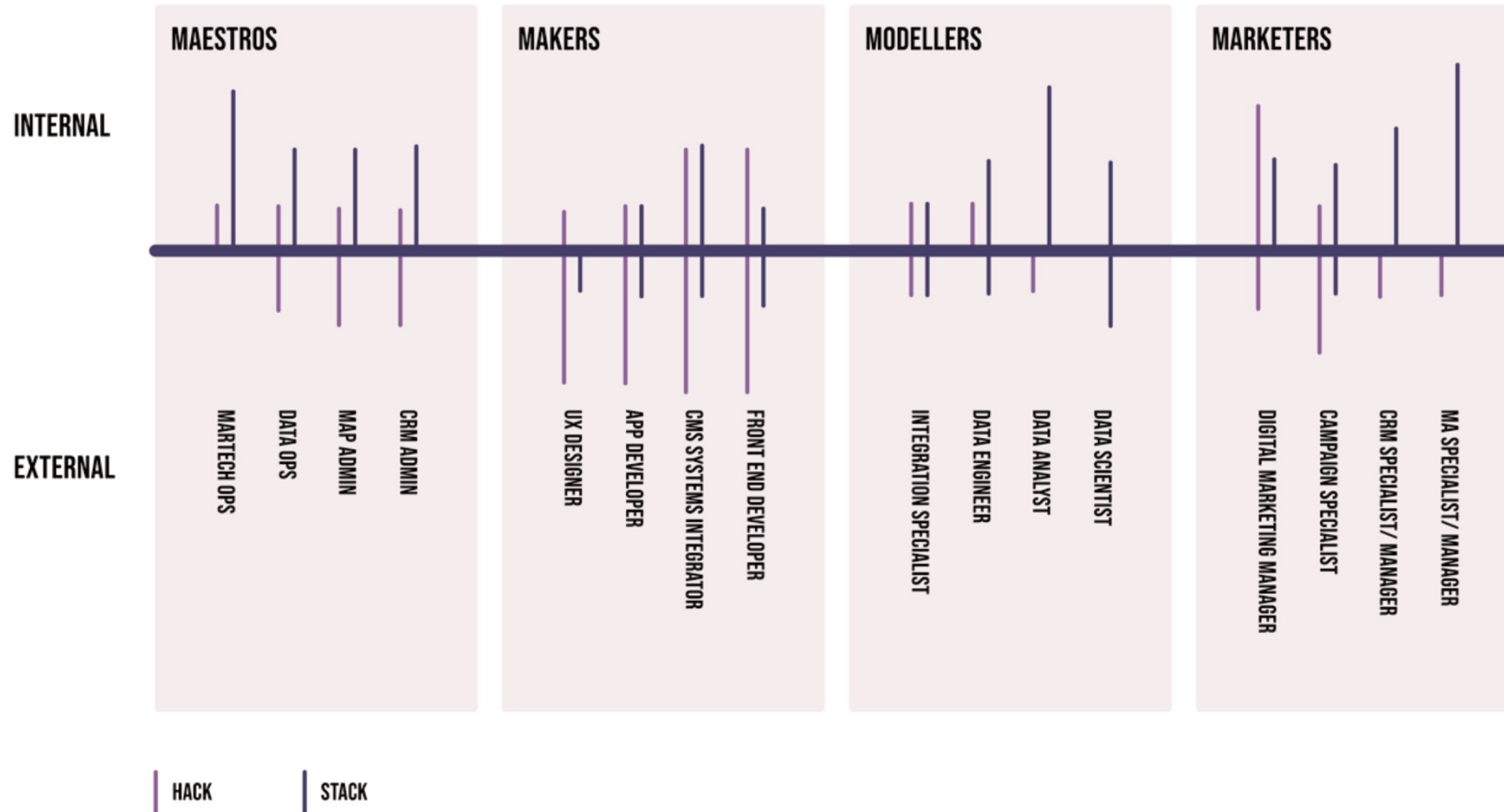
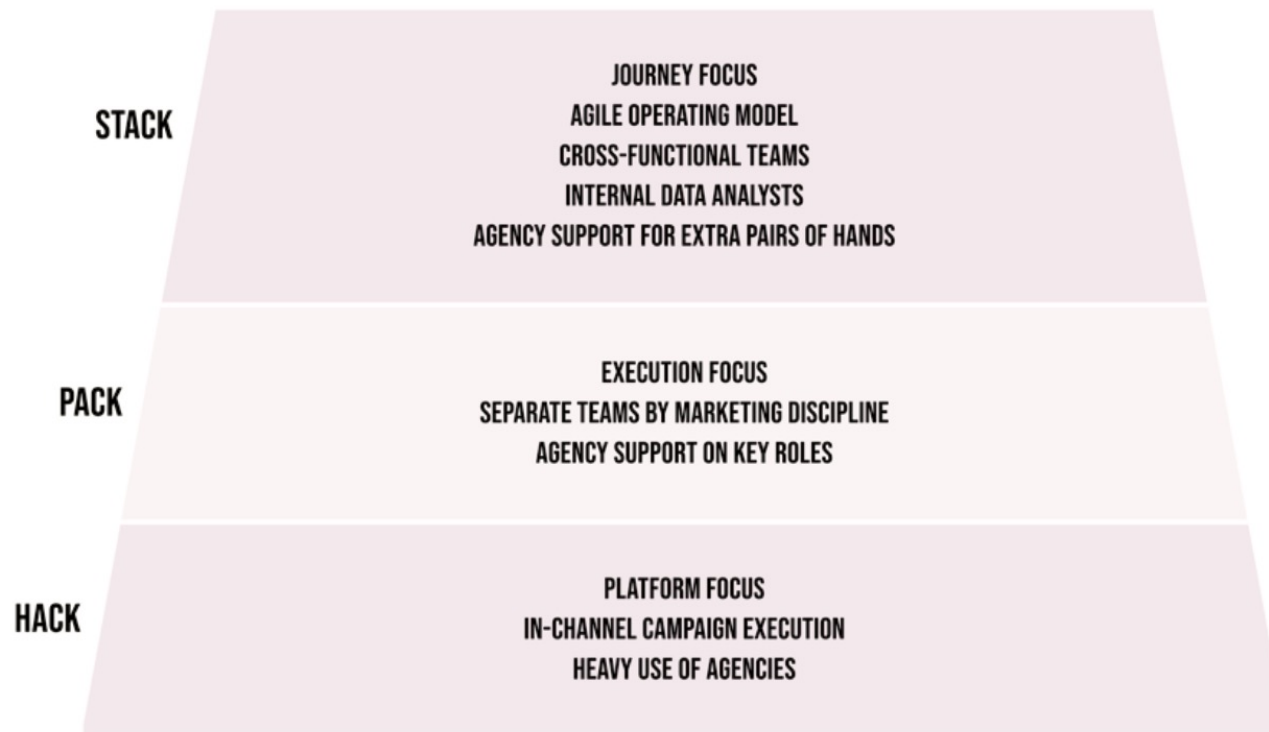


Figure 33. Hack vs Stack – people and skills.



PYRAMID OF PERSONALIZATION- BACK END ORGANIZATIONAL MATURITY

PEOPLE AND SKILLS



PACE LAYERED MODEL



Figure 34. The PACE layered model.

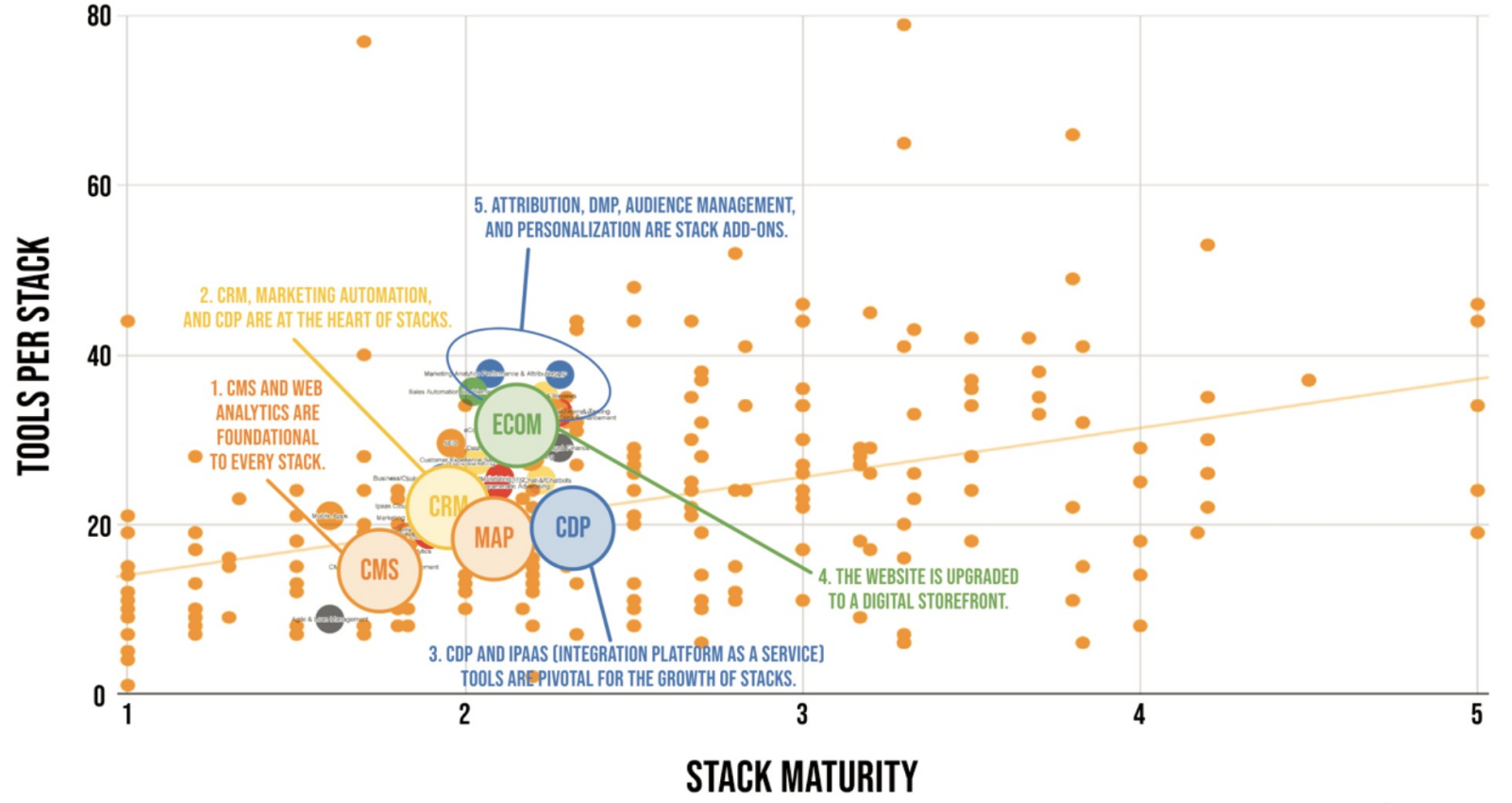


Figure 35. How martech stack maturity correlates with the implementation of systems of record (DMP: data management platform, see the text below for explanations of the additional abbreviations).

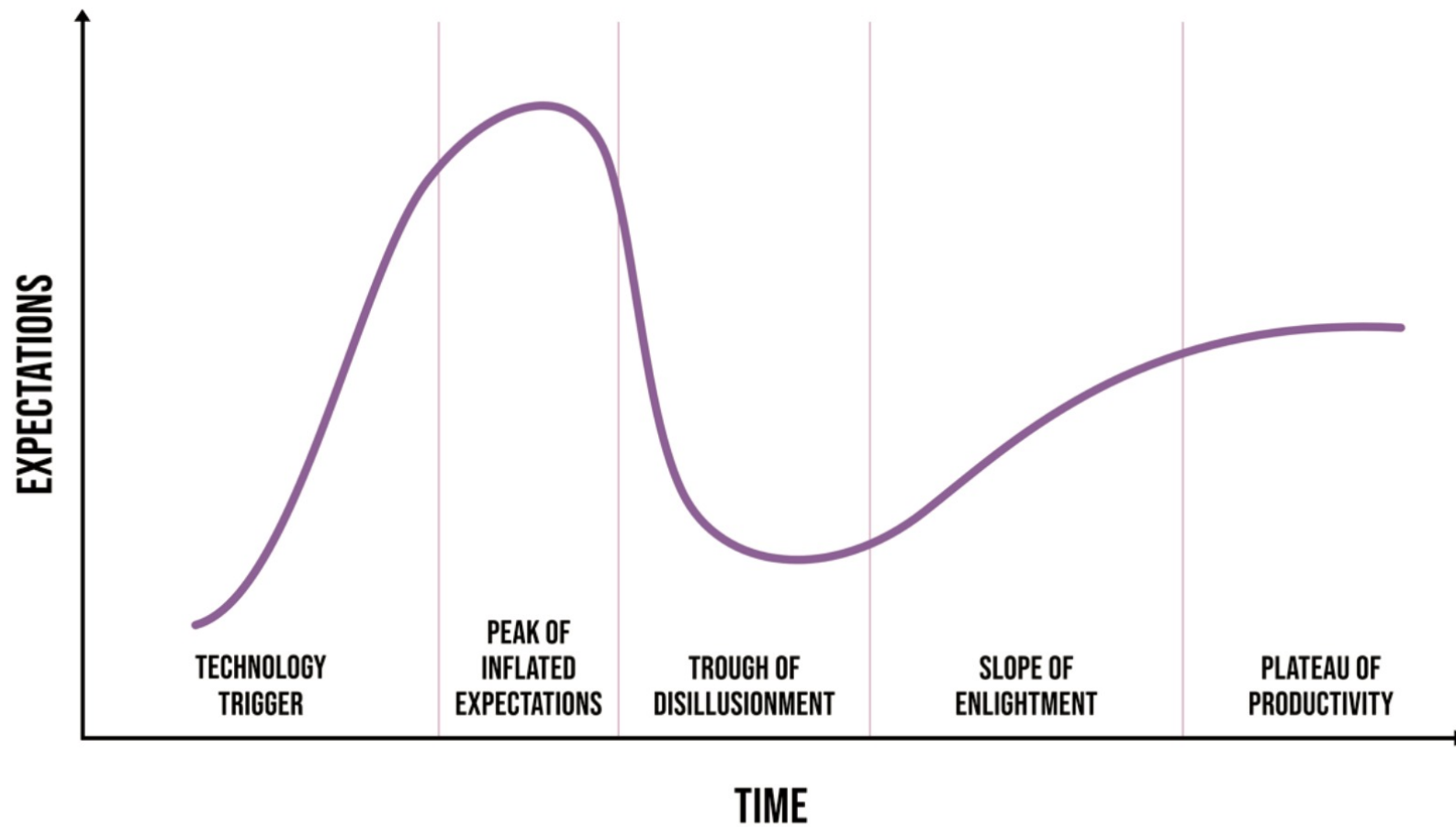


Figure 36. The Gartner hype cycle.

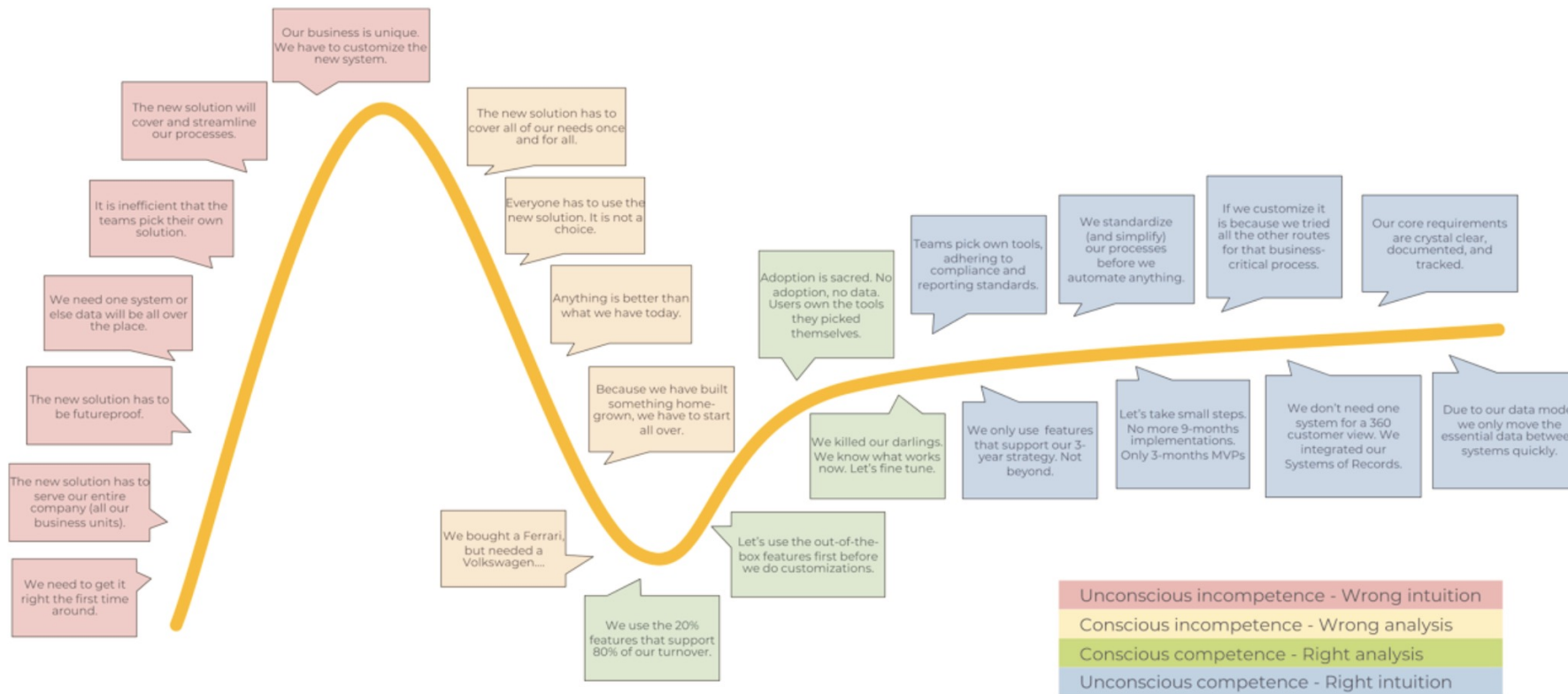


Figure 37. Four stages of technology competence: markets, companies, and individuals all have their own learning curves.

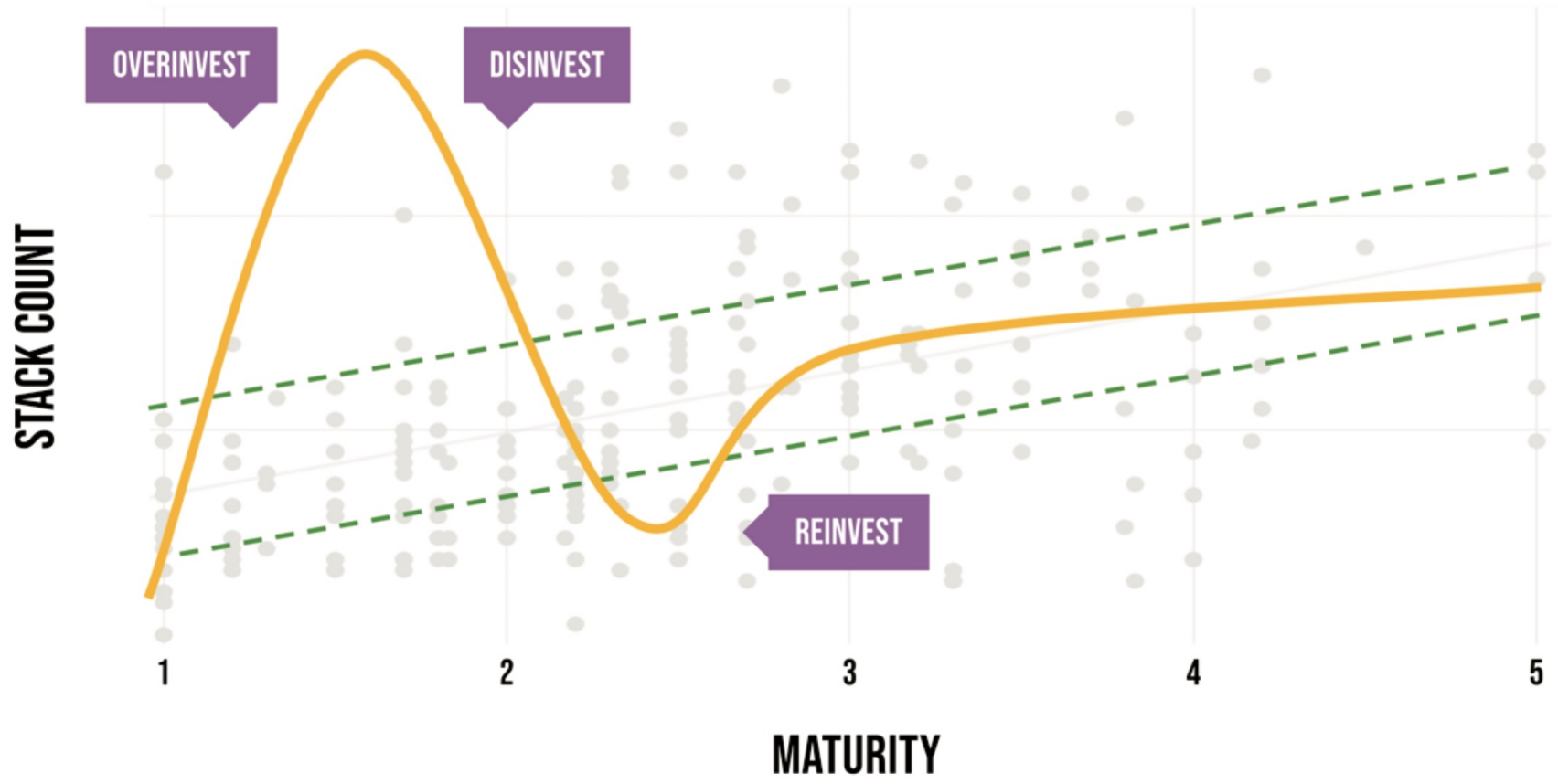
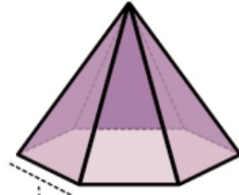


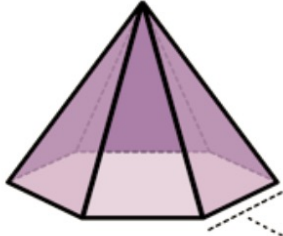
Figure 38. Flattening the martech hype cycle: navigating your team through the various stages.



PYRAMID OF PERSONALIZATION - BACK END ORGANIZATIONAL MATURITY

TECHNOLOGY





PYRAMID OF PERSONALIZATION - BACK END ORGANIZATIONAL MATURITY



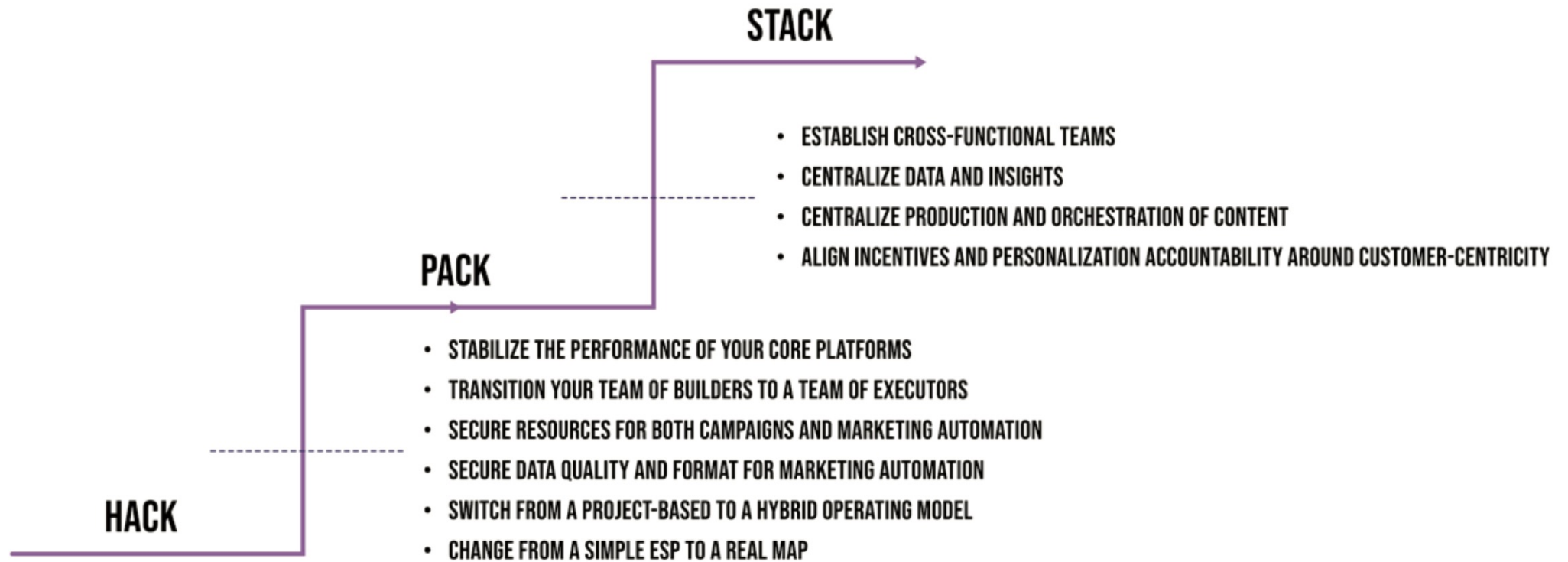


Figure 39. Breaking through the glass ceilings.

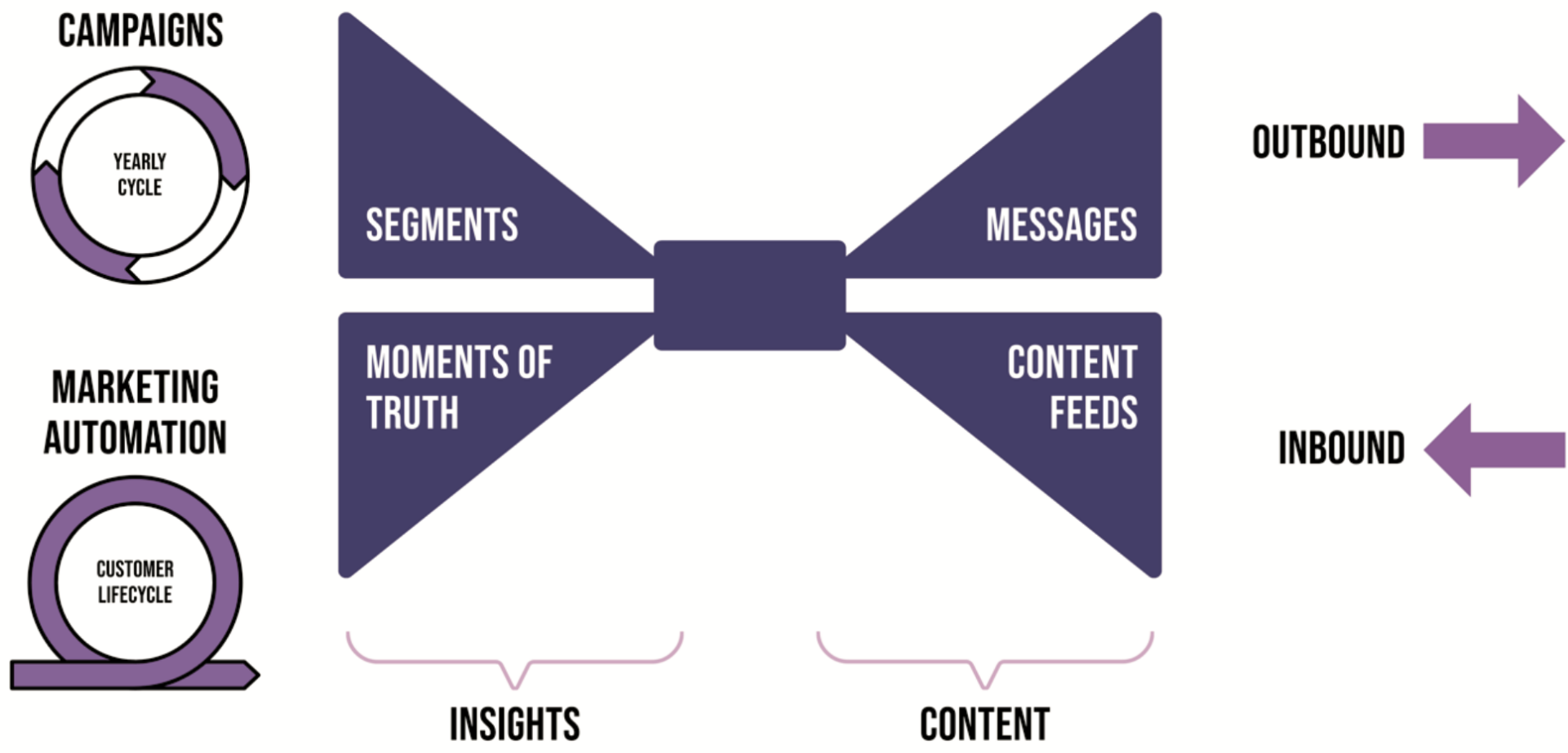


Figure 40. The complete Bowtie of Personalization.