B2B Personalization Best Practices Checklist
Personalizing content as part of your B2B ABM strategy is no longer a choice; it’s a necessity. Nearly 80 percent of senior marketers that report exceeding revenue goals had a documented personalization strategy in place.

Unfortunately, many B2B companies struggle with personalizing their marketing campaigns.

Here’s a quick checklist of what you need to do to give your ABM strategy a personal touch.

☐ Define Your Data Needs

Your personalization strategy relies on collecting the right information about your leads and accounts. You’ll need to identify what data is essential so you can focus on enriching your customer profiles with accurate (and valuable) information.

Data you want to collect may include:

- Job roles, seniority, and titles
- Industry/sector
- Location
- Language
- Technologies used
- Social bios
- Company size & revenue
☐ Evaluate Your Current Data

How accurate is the data in your platforms? Is it incomplete, outdated, and/or inaccurate? Then you need to do something about it before moving forward. This is the time to adopt a customer data platform to cleanse and update your records (using the data requirements you set in the last step).

☐ Begin Segmenting Your Audience

As you begin enriching your data, you’ll need to ensure it’s serving the segments you want to target. For example, if you have five key personas on which you want to focus, then use the parameters of those profiles to create your segments. The more detailed your segments, the more likely they’ll be to convert.

For example, you may want to hone in on specific industries, roles, technologies, and pain points.

*Pro Tip: Use your best accounts to build the parameters for your segments.*

☐ Identify Key Actions/Behaviors (& Take Action)

There are certain behaviors and actions worth noting. For example, if an account visits one of your product pages more than once, then it’s a great time to send a personalized email with a blog post, download, or case study.

Other behaviors that can trigger action include:

- Another person within the same company viewing a pricing/product page
- Several contacts from the same company engaging with your business via email or chat within the past month
- Visits to various documentation pages in one session
Develop Personalized Content for Segments & Triggers

You'll need to be prepared to deliver personalized content right away. This requires creating content for each of your segments, personas, and the triggers they may set off.

Unlike with B2C, it takes more than one personalized email to convert a B2B contact. It's a longer sales cycle, which calls for multiple touchpoints and content to end in a conversion.

Be sure you have enough blog posts on the topics in which your personas are interested. Be ready to send personalized emails as they drive closer to the end of their journey.

Other personalized content you can develop includes:

- Case studies
- White papers
- Ebooks
- Guides
- Checklists
- Videos
- Web content and product pages

Deliver the Right Message and Offer at the Right Time

Real-time data collection enables your marketing teams to act quickly to capture leads and nurture accounts. One way to do this is to personalize your home page and other content throughout your site.

Using the real-time data (who's visiting the website), you can make timely recommendations to other pages and content using automation tools (chatbot or email).

You'll need to understand the needs of your accounts at that time, which you can determine by analyzing their behavior on the home page. Then to boost conversions, personalize your calls to action (addressing their unique needs). It's also a good idea to determine into which category the personalized content fits. Is it specific to an account, lead, stage, persona, or segment?
Now, there are other ways you can offer real-time personalized content. PPC ads (and ad retargeting) are a great way to offer a promotion, case study, white paper, or other CTA that’ll drive leads and accounts through to a conversion.

The goal is to know what your accounts need at a given moment and direct them to content that’ll take them to the next step.

Monitor & Measure Content Effectiveness

At the end of the day, you want to know your personalized content is actually working. There are key metrics you should monitor to determine this:

- Consumption of content
- Engagement with content
- Number of visits to a particular page
- Interactions with the company (chat, email, phone)
- Content downloads
- ROI / conversions

Win More with ABM Personalization

Personalizing content as part of your ABM strategy doesn’t have to be a painful ordeal. With clear steps and the right tools, you can make it a seamless process. Just use this checklist as your guide for setting up your campaign.

Then to ensure you’re getting the best turn on your investment, watch the webinar: Account-Based Marketing: 3 Secrets to Great ROI today!