

E-Book

# A High-Level Guide to B2B Personalization in the AI Era



This guide has been developed based on a series of conversations with David Edelman, the best-selling author of *Personalized: Customer Strategy in the Age of AI*. You can watch the full conversation with David Edelman [here](#).

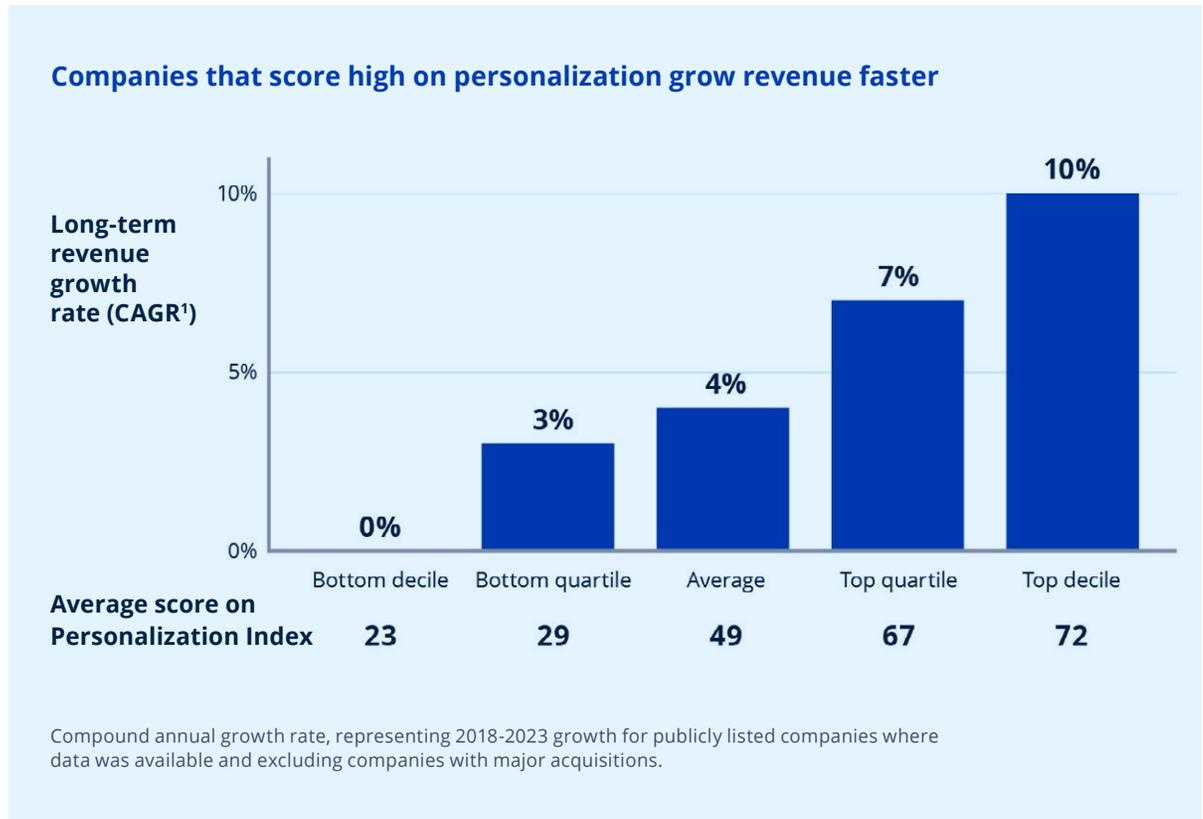


# Strategic B2B Personalization Defined

**Personalization in the B2B go-to-market (GTM) focuses on using information to create value for prospects and customers specific to them.**

Personalization like this is possible because of how the information is captured, analyzed and delivered. As such, personalization stands to become a different approach to segmentation, one that puts the ability to deliver customer value-based information at the forefront of prioritized go-to-market targeting and actions.

Simply put, companies should be striving to better personalize to the prospects they're already prioritizing in their plans. According to [David Edelman's research](#) with the Boston Consulting Group (BCG), the business case for this approach is highly compelling: According to their Personalization Index covering 87 publicly listed firms, companies that score high on personalization **grow revenue 10% faster than their peers.**



1. From *Personalized: Customer Strategy in the Age of AI*. Copyright 2024, The Boston Consulting Group, Inc.

## Transform Account-Based Experiences Through Contextual Intelligence

**Significance:** As Edelman explains, account-based marketing (ABM) has evolved beyond simple targeting to concentrate harder on “servicing and providing value to the customer.” The emphasis thus lies in moving beyond generic account-based approaches to methods that reflect real-time business context to serve very real prospect and client information needs.

### How Data + AI delivers:

- A. Aggregate multi-source information.** Combine internal interaction data with external signals (e.g., acquisitions, product launches, leadership changes, industry trends and second-party intent data from sources directly relevant to a prospect or customer’s business).
- B. Generate contextually relevant insights.** AI can help to analyze patterns that identify optimal engagement “moments” in time or in a prospect’s business situation – and then connect them to relevant value propositions or offers of guidance and support. Make sure to source the most impactful data, and to work collaboratively with operational teams and end-users as necessary, to bring the personalization to life in your GTM motions.
- C. Enable intelligent sales interactions.** The endgame is to provide salespeople with value-creating material – based on customer interactions with the company augmented by second-party information to fill in critical gaps in understanding and perspective.

1. From research by David Edelman (Harvard Business School, former CMO of Aetna) and Mark Abraham (Boston Consulting Group), authors of “Personalized: Customer Strategy in the Age of AI,” along with insights from Informa TechTarget’s analysis of B2B personalization trends.

### Example in action:

Cisco’s approach demonstrates this opportunity.<sup>1</sup> They integrate internal customer data with external business intelligence empowering sellers to approach clients in more relevant and useful ways.

## Orchestrate based on omnichannel journey intelligence

**Significance:** B2B buyers consume content across multiple touchpoints (physical and digital) before making decisions. Analytical AI can make sense of what topics are drawing a target's attention and help anticipate which format and channel they are most likely to turn to or welcome next. Simply put, you can know when a sales motion is truly recommendable versus the delivery of a digital asset to meet the prospect's needs and preferences in the moment.

### How Data + AI delivers:

- A. Map cross-channel behaviors.** AI-powered analytics are quickly shining more light on actual buyer's journeys. Patterns that were previously known of, but difficult to take action on, can now be instrumented in near real-time. You can highlight content consumption patterns across digital properties, events and direct interactions. You can know what a target needs and how they would prefer to receive it at the most useful point in their process.
- B. Predict next-best actions.** AI can help you learn from successful interaction sequences and it can then prescriptively recommend optimal follow-up touchpoints applied to any specific first-party signal or signal cluster (from multiple related people, like buying group members).
- C. Intelligence-based intelligent routing.** Similarly, next-best logic can be used within a digital experience to direct prospects to incrementally appropriate experiences, offers or interactions based on their demonstrated interests and journey stage status.

### AI's training imperative:

Delivering better outcomes depends on obtaining the necessary data and using it to discover better GTM performance. As Edelman emphasizes, "AI has to learn [what happened in the past, and then] ... you need to test and learn ..." to determine what do differently that works! Situations are continuously changing so GTM organizations must invest in a continuous training approach conceptually similar to those used with human-only teams.

## Elevate product-solution integration

**Significance:** Due to both the accelerating expectations of customers and the capabilities that AI makes possible, the boundaries between a product and a personalized experience (of your company) are dissolving. Edelman's research shows that forward-thinking companies realize "... the power of what they can do with information. [And it's] changing their perspective about what their product, their offering, can be."

### How Data + AI delivers:

- A. Analyze usage and contextual patterns.** By better understanding how different customer segments use your products you can determine what segment-specific enhancements could deliver win-win value.
- B. Generate solution recommendations.** AI can identify optimal product combinations and configurations for specific use cases or segment needs. It can help you better understand which accounts you will succeed with and how best to retain and grow them with reference to your offerings and current or future relationship management techniques.
- C. Deliver incremental advisory experiences.** By leveraging deep product usage knowledge, additional learning from across your customer base, and when needed, the advice of third-party experts, you can transform relationships, from product centric to solution or even business-advice-based.

### Real-world application:

By combining product metadata with customer purchase patterns and consultation insights, an industrial distributor client of Edelman's<sup>1</sup> evolved from simply stocking products based on historical volumes to helping customers "... figure out what's the good, better, best solution for [customer segments and even specific customer's] needs."

## Accelerate Content Relevance at Scale

**Significance:** B2B buyers need different information at different stages in their journeys towards full understanding of the issues they're challenged by. Their "... questions evolve as people learn more ..." is how Edelman describes it. The opportunity here is to create content that answers the specific questions that are on prospects' minds as they are progressing towards purchase readiness. In essence, this is what building content for prompts (GEO and AIO versus keyword-based SEO) is all about: better content for the targets, founded on a better understanding of needs during buyer's journeys.

### How Data + AI delivers:

- A. Identify question patterns.** To gain maximum insight into buyer's journeys, your analysis should have access to a combination of your own first-party sources and the first-party sources of others serving your target audiences (aka second party to you). Search behaviors, content engagement and sales-relevant conversations aren't happening only in your owned interaction spaces, they're happening in a host of other spaces across the buyers' preferred network of trusted experts (aka the buying network).
- B. Optimize content discovery.** The evidence is already in that buyers are relying less than ever on direct visits to vendor websites. You need to ensure that your content appears when and where prospects are most likely to find it valuable in fulfilling their "jobs to be done." AI can help you understand which among

your assets is most useful, where you have gaps and suggest alternatives for filling them. Industry-centric marketing-service partners like **Studio by Informa TechTarget** can be particularly helpful in accelerating progress here.

- C. Generate contextually relevant content.** AI can curate contextually relevant content from your own resources in highly efficient fashion. Importantly, it can augment your own material with relevant materials from outside your walls. AI can know what the prospect likely needs and help you be the one who delivers it to them. To support this reality, your plans and actions should include ample attention to how you're influencing other expert sources (analysts, publications, partners, et al.), because their knowledge and opinions of you can provide valuable outside validation.

### Strategic insight:

The most effective approach [to content discovery in the AI era] focuses on "... posing and answering the questions that are on people's minds that they are most likely to pump into a chat prompt." This is what will make content both more discoverable and genuinely useful.

# Second-Party Intent Data's Critical Role in the AI Era

Each of these opportunities depends on making better use of available data sources, both inside and external to your company. Inside your systems, you have access to high-quality, permission-based behavioral insights that AI is finally rendering more usable. But with respect to any prospect or customer, that only tells a small part of the story. Competitiveness in the AI era requires that you have a fuller picture, one with the customer's true needs more fully centered in your thinking. Second-party intent data from digital properties that your prospects frequent as well as expert insights from analysts, journalists, peers and partners provide key augmentation resources for competitiveness going forward.

Informa TechTarget's second-party permissioned intent data offers unique advantages:

- **Behavioral accuracy:** As compared to less transparent analytical methods, real, verifiable research behaviors reveal genuine interests and priorities.
- **Contextual richness:** Understanding exactly what specific individuals are researching – for example, editorial or analyst material or assets from known

competitors – reveals critical nuances about their decision-making process, stage and likely disposition towards you.

- **Permission-based actionability:** Explicit consent acquired by a second-party intent provider from their own audience members gives you permission to use the data in your own analytics systems and creates the ethical foundation for leveraging it into your personalization initiatives.

## Assessment criteria for the Personalization Index

Empower Me	Know Me	Reach Me	Show Me	Delight Me
<ul style="list-style-type: none"> <li>• Level of personalization by channel and step in the customer journey</li> <li>• Personalization efforts focused on the most important channels/journey steps</li> <li>• Overall impact of personalization on customer experience</li> </ul>	<ul style="list-style-type: none"> <li>• Number and depth of digital customer relationships</li> <li>• Retention and growth in digital customer relationships</li> <li>• Integrated 360-degree view of each customer and quality of data</li> </ul>	<ul style="list-style-type: none"> <li>• Data is used to target each customer based on their needs</li> <li>• Experiments designed at scale using automation</li> <li>• Next best action orchestration across channels, sequence of messages, timing</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to create content that speaks to each customer at scale</li> <li>• Ability to rapidly launch personalized experiences</li> <li>• Sophistication of content management capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to run rapid test-and-learn process at scale, with iteration cycles measured in days</li> <li>• Clear, rapid measurement with actionable KPIs</li> <li>• Personalization has clear ownership and committed funding</li> </ul>

From *Personalized: Customer Strategy in the Age of AI*. Copyright 2024, The Boston Consulting Group, Inc.

## Implementation Guardrails and Getting Started

While pursuing these opportunities, organizations must avoid common pitfalls that actually undermine the strategic goal of creating better lifetime value (LTV) with customers. Says Edelman, the biggest risk is deploying AI tactically, without sustainable business improvement as the objective. If we simply deploy AI to say, “Oh, there’s a target. They’re interested in this particular technology. Let’s go after them,” there’s a very real risk of simply accelerating a churn and burn mentality towards your market. Because in actuality does worse by the customer in the face of an opportunity to do better, this kind of mistreatment arms race is highly likely to accelerate the failure of many also-ran players. Done well, AI stands to revolutionize GTM performance by making meaningful personalization possible for sellers and buyers alike.

### Three steps to get started

- 1. Audit your data foundation and align to journey-first thinking.** Assess your current data assets, particularly the availability of behavioral signals and intent data, from inside and beyond your company’s view. Identify gaps in customer journey visibility and establish partnerships with second-party data providers and other experts to fill critical information needs.
- 2. Start with a significant high-impact use case and keep humans-in-the loop.** Choose a specific personalization opportunity where you can demonstrate clear, substantive ROI – whether that’s account-based intelligence, content relevance, journey orchestration or something else. Humans-in-the-loop at the critical junction points of your GTM processes will help ensure that what is delivered from the data works as desired for the recipients all the way to the customers and prospects they are looking to better serve. Build success before expanding scope.
- 3. Invest in a continuous-learning infrastructure so you can scale.** Remember that personalization’s strategic effectiveness depends on your ability to learn and adapt faster than competitors. This requires establishing the necessary sourcing, organization and processes as needed for ongoing AI training, human oversight and performance optimization – the operationalized ability to properly support a growing portfolio of personalization projects in production.

## A personalization imperative

The future belongs to organizations that can combine human empathy with AI intelligence to create customer experiences that feel both personal and valuable. The time to begin building these capabilities is now. The convergence of AI capabilities and rich behavioral data creates unprecedented opportunities for B2B organizations to deliver genuinely valuable, personalized experiences at scale. Companies that master this combination will build sustainable competitive advantages through stronger customer relationships, more efficient go-to-market operations, and accelerated revenue growth.

**The question isn't whether to invest in AI-powered personalization, it's how quickly can your organization build the capabilities to compete effectively in an increasingly personalized B2B go-to-market world.**



# About Informa TechTarget

Informa TechTarget (Nasdaq: TTGT) informs, influences and connects the world's technology buyers and sellers, to accelerate growth from R&D to ROI.

With an unparalleled reach of over 220 highly targeted technology-specific websites and over 50 million permissioned first-party audience members, Informa TechTarget has a unique understanding of and insight into the technology market.

Underpinned by those audiences and their data, we offer expert-led, data-driven, and digitally enabled services that deliver significant impact and measurable outcomes to our clients.

- Trusted information that shapes the industry and informs investment
- Intelligence and advice that guides and influences strategy
- Advertising that grows reputation and establishes thought leadership
- Custom content that engages and prompts action
- Intent and demand generation that more precisely targets and converts

Informa TechTarget is headquartered in Boston, MA and has offices in 19 global locations. For more information, visit [informatechtarget.com](https://informatechtarget.com) and follow us on [LinkedIn](#).

