

Why can't we be friends?

Four strategies for building
personalized consumer
relationships at scale



Have you ever had to reintroduce yourself to a colleague more than once? The first time, you're likely to chalk it up as a harmless mistake. But the third time? Or fourth? You start to think they just don't like you very much.

For consumers, this is what a lack of meaningful personalization feels like. Consumers want their brands to recognize them, not just for convenience's sake, but for the same reason you want that colleague to remember your name: because you matter.

In fact, today's consumers are more than willing to share information in exchange for better service and more tailored experiences. According to McKinsey research, 76% get frustrated when they share information, and it doesn't get utilized.

“71% of consumers expect companies to deliver personalized interactions. And 76% get frustrated when this doesn't happen.”

Source: McKinsey Next in Personalization 2021 Report



For savvy marketers who lead trusted brands, personalization is more than adding a simple [First Name] to the top of your marketing emails and mailers; it's a guiding principle to build your brand around.

Today's personalization requires building smart and intimate relationships with consumers, wherever they engage with your brand. And despite the increasing challenges around data usability, there are still ways to implement personalization across channels effectively and at scale.

In this guide, we'll explore how your organization can achieve a trusted and highly personalized brand presence through four collaborative strategies.

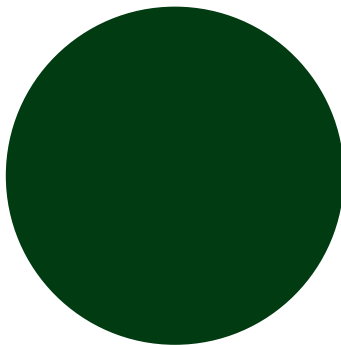
1. Understand the personalization maturity scale

Ultimately, brand-to-consumer relationships should mirror the dynamics of friendships and peer interactions. Both processes start with an initial introduction and mutual learning. For marketers, this is the foundation phase.

As you enter the growth stage, this knowledge is leveraged to strengthen the relationship, ensuring both parties feel safe, trusted and understood.

The innovation phase of relationship-building is where the real magic happens— interaction becomes seamless and natural due to a deep mutual understanding.

For marketers aiming to enhance their personalization efforts at scale, Quad experts advise developing a personalization maturity curve and identifying where your organization falls with your consumer relationships. This tool helps align your organization with its goals, making the data collection and deployment process more manageable and effective, and provides you with a simple starting place.

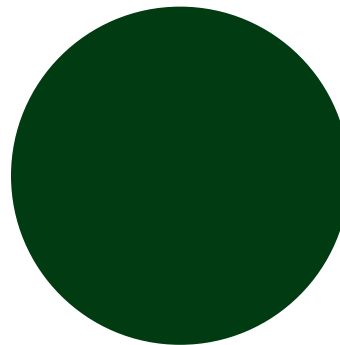


Foundation:

Getting acquainted

What this looks like for marketers:

- Behavioral analytics
- Onsite surveys
- Heat mapping
- Eye tracking

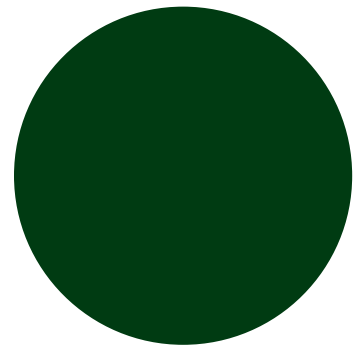


Growth:

Building trust

What this looks like for marketers:

- Incorporating learnings into personalized content
- Establishing that you hear and understand the consumer when they give you information



Innovation:

Getting intimate

What this looks like for marketers:

- Using machine learning to deepen relationships
- Dynamic personalization that automatically matches the individual's journey.

2. Adopt data modeling

One of the most common myths about delivering personalization at scale is that you need vast amounts of personal data to properly implement it. But today's comprehensive data and predictive modeling capabilities have made it easier for marketers to get more out of the information they have.

Quad's predictive models use a statistical or machine-learning algorithm to predict future outcomes or trends through identification of patterns and relationships.

In simpler terms, it's like using machine-learning magic to squeeze every drop of insight out of a small set of data. These insights can then be applied to your omnichannel personalization strategy for all future customers and prospects.

Advanced predictive models go beyond demographics, personas and psychographics. They dive into your customer's motivations, preferences and desires, providing a future-proof and flexible plan for a fully personalized CX.

Data modeling can turn transaction data, purchase history and reporting from unexpected places into actionable direction that informs the imagery and messaging you use for different segments.

But with heavily matrixed intelligence comes heavily matrixed responsibility. It's critical to ensure clean workflows and processes by utilizing vendors and partners who can maintain order at large scales.

In action: Tapping the power of consumer attitudes

In 2023, Quad Analytics conducted a nationally representative survey of 3,000 individuals to uncover consumers' attitudes about their insurance plans. Through the survey, the team was able to group the respondents into three sectors based on their preferences, which resulted in a predictive model that can be used to score any payor member or prospect file. Ultimately, use of the model and targeted messaging can better engage customers and make member acquisition and outreach efforts more effective and efficient. More new members. More engaged members. More retained members. Lower costs.

[Learn more](#)

3. Lean into resilient data sources

For scaled personalization, a resilient data strategy also plays a key role. As traditional online data sources continue to live in a state of regulatory flux—see the industry’s long goodbye to the great and powerful cookie—a resilient data strategy will ensure you have access to consumer insights regardless of policy or technology changes.

In short, for brands, it’s about being data rich in the right ways.

Audit your current data and identify sources and types

Assess your current streams of customer data and identify any gaps.

Identify external partners who can help collect, maintain and augment your data

Opt for partners who allow you to action your own data and provide ways to enhance it. “Walled gardens” have powerful first-party data in their ecosystems that you can pay to access, but for scaling you want to make sure your partners can bolster your existing strategy, not just sell theirs.

Determine who “owns” the data in your organization and establish a source of truth

Avoid silos by centralizing workflows and processes. When using data for personalization at scale, it’s critical to have a transparent and trusted repository.

Develop value exchange for customer data

Ensure the customer is receiving valuable content or other offerings for providing their information. Customers want to share their data with you if it benefits them and is used responsibly.

Build marketing tactics that value your customer’s consent

Always offer an opt-out option, and make sure that if you’re asking for information — you use it. Not digesting the data your customer provides is a surefire way to kill trust.

Lean into data types with permanence

Be wary of online anonymity. While the average consumer may have multiple email addresses that can signal conflicting or unreliable datapoints, they are not likely to have more than one household address. Lean into sources that offer stability.

4. Leverage smart partnerships

Many partners offer very similar types of data, only varying in accuracy and cost. To make sure you avoid the “sea of sameness” and boost your competitive edge, foster partnerships with data partners who understand your unique needs and can supplement you in custom and flexible ways.

To deliver thoughtful and effective personalization, you might require a partner who can source first-party data for you or help organize and centralize the data you pull as you grow. Make sure that you fully understand your vendor’s capabilities and decipher whether they can scale and grow with you.



Case Study

Kasasa

Fintech and marketing services company [Kasasa](#) came to Quad when they needed to scale their direct mail business. List management was done manually, leaving clients struggling to personalize their DM offerings. Quad implemented [JourneyMail™](#) by Quad, an app for Salesforce that provides automated campaign planning and execution across online and offline channels. JourneyMail’s templates made it easy to customize multiple DM pieces with personalized images and offerings in response to specific behaviors or events—like sending a DM based on email and other channel engagement activity. By streamlining workflows, the team can now achieve personalized and segmentation-based marketing in one efficient sprint.

[Learn more](#)

Getting started

- Identify your place on the personalization maturity model
- Assess your current data and identify any gaps
- Leverage partners who can boost your current offering through tools like predictive models, and who can offer you robust and unique enhancements.

Better personalization builds better brands.

[Contact Quad](#)

About Quad

Quad (NYSE: QUAD) is a global marketing experience company that helps brands make direct consumer connections, from household to in-store to online. Supported by state-of-the-art technology and data-driven intelligence, Quad uses its suite of media, creative and production solutions to streamline the complexities of marketing and remove friction from wherever it occurs in the marketing journey. Quad tailors its uniquely flexible, scalable and connected solutions to clients' objectives, driving cost efficiencies, improving speed to market, strengthening marketing effectiveness, and delivering value on client investments.

Quad employs approximately 13,000 people in 14 countries and serves approximately 2,700 clients including industry leading blue-chip companies that serve both businesses and consumers in multiple industry verticals, with a particular focus on commerce, including retail, consumer packaged goods, and direct-to-consumer; financial services; and health. Quad is ranked among the largest agency companies in the U.S. by *Ad Age*, buoyed by its full-service [Rise](#) media agency and [Betty](#) creative agency. Quad is also one of the largest commercial printers in North America, according to *Printing Impressions*.

For more information about Quad, including its commitment to ongoing innovation, culture and sustainable impact, visit quad.com.

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