

# Targeted Banners in Personyze

Targeted banners embedded  
on your site's pages.



# Why use Personyze for targeted banners?

[Watch a video tutorial of basic targeting campaigns in Personyze here](#)

## **THE POWER OF TARGETING**

Targeted banners are more relevant to the visitor by being specifically designed for their segment, and therefore are more likely to achieve your goal, whether it's signups, downloads, purchases, engagement, etc.

## **SHOW ANY BANNER CONTENT**

Personyze embeds banners into your pages with no coding required, and the banner itself can be any HTML design.

## **DYNAMIC BANNERS**

Personyze gives you the capability of having dozens or even hundreds of banners for different segments, in a single campaign, using split cases and dynamic content tools.

# Banner setup process

**Note:** Personyze must first be activated on your site. Installing Personyze involves a 5-minute or less copy/paste of our tag to your tag manager, and requires no dev work. [Read how to do so here.](#)

## STEP 1

Targeting rules and design

## STEP 2

Display settings

## STEP 3

QA and performance

Target Content QA Performance

**Visit Type** ^

✓ New visitors + Returning visitors # No. of sessions

↻ Past sessions

🕒 Time since last visit

👁 Page Views ▾

📱 Device Type ▾

📅 Date and Time ▾

🕒 Time on Site ▾

👤 Limit Audience ▾

📍 **Countries/Cities** + Add ^

- Country United States

📄 Pages + Add ▾

🗄 Session Attributes + Add ▾

👤 User CRM/ABM/Profile data + Add ▾

**CHANGES NOT SAVED YET:**

Create audience

**YOUR CAMPAIGN IS TARGETING**

New visitors and Include: United States and

**PRESENTING NO ACTIONS**

**FORECASTED RESULTS** ⓘ ↻

**Filters** ▾

 In last 90 min we have 488 sessions.

- 100 (20%) matching View and test rules.
- 388 (80%) not matching View and test rules.

654 (24%) pages matching.  
0 sessions from my IP address

## Step 1: Targeting rules

A targeting campaign can be thought of as an if/then statement.

The "if" part of the statement is the targeting rules. Over 70 rules are available for targeting, with and/or operators between them. A preview will be shown on the right of how many of your site's visitors will likely match.

# Step 1: Design

Next, you'll be directed to select a Personyze design template or insert your own HTML, and then customize it.

Every aspect of the template is customizable, and you can even use split cases to have multiple variations of the content. You can also directly edit the HTML.

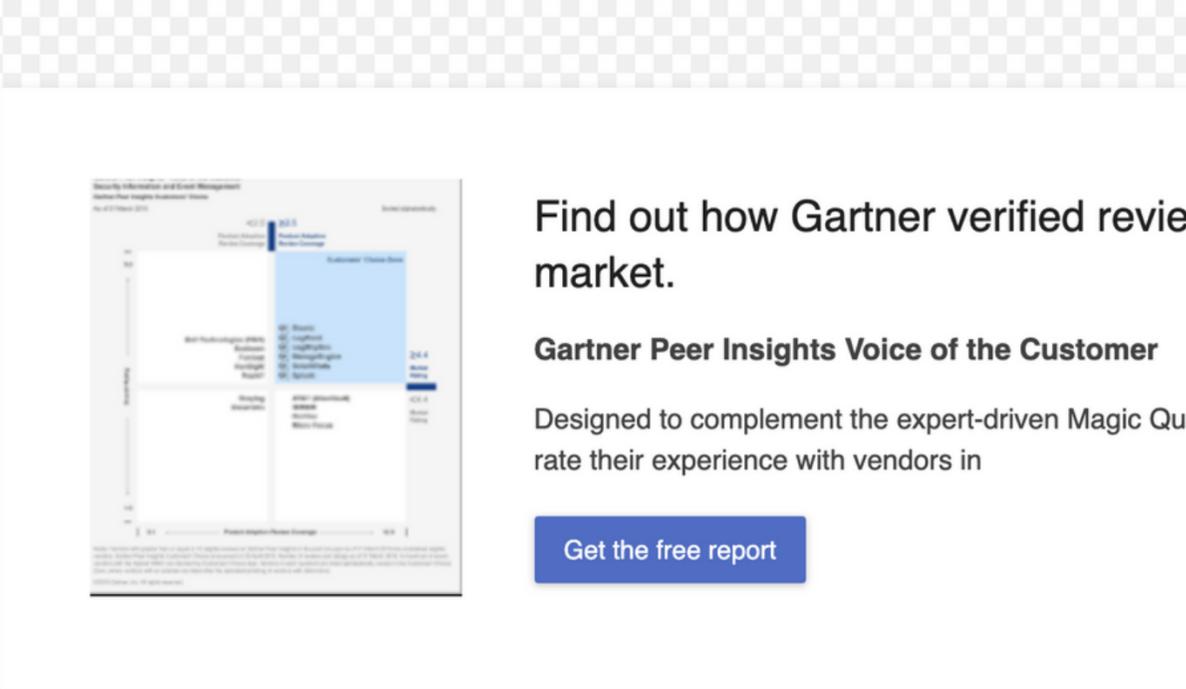
[Read more about split cases here](#)

What to present > 2 Choose placement

Design the widget that will be presented on the site.

- Box
- Picture
- Content
- Second Button
- Second Button
- Close Button
- HTML Source (advanced)

Preview as on:  Phone  Tablet



Enable content variations (conditional variables). ⓘ

> 1 What to present > 2 Choose placement

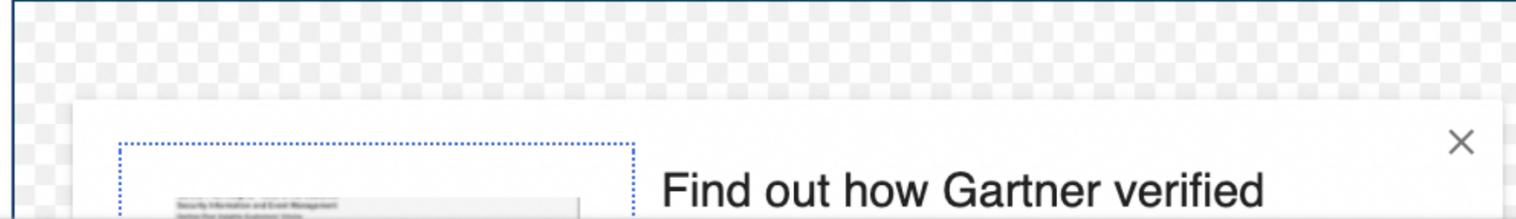
Design the widget that will be presented on the site.

**Properties of: Picture: Picture URL** Return

Picture URL ▾

Choose file

Preview as on:  Phone  Tablet



Upload Files

OR drag files here

Double-click a file to select

 Screen Shot 2021-07-05 at 17.06.40 PM	 EarlyBird-Apps-Strategies (2)	 round check	 CaptureDemo	 WebinarJan2020	 JanVendUpdateIMG2	 GPI-email-signature-vendor-webinar-reg-promo-20200116 (004)
 GPI-email-signature-vendor-webinar-reg-promo-20200116	 Promo-IAM	 Promo-ITIO-Cloud-Strategies	 Promo-Apps-Strategies	 v1.5 sessin image	 EarlyBird-ITIO-Cloud-Strategies	 EarlyBird-IAM
 EarlyBird-Apps-Strategies	 top	 Rectangle	 Example quadrant	 Screen Shot 2019-07-17 at 2.21.22 PM	 GPI-emailsig-vendor-webinar-reg-promo-20190626 (2)	 GPI-emailsig-vendor-webinar-reg-promo-20190626

# Step 1: Design

The images for your content can also be uploaded to Personyze, and loaded via our CDN, to reduce delay time.

Do to so, simply upload the image in the content editor.

# Option: Personyze Variables

Personyze also gives you the option of inserting Personyze variables into the content of your banner (or any other personyze content).

Examples of Personyze variables you may want to insert include company name, first name, industry, or any other known variables you may have on the visitor, from your CRM, third-party data vendor, or forms the user has filled on the site.

Version 40 (testing+production) ▾

### Insert Personyze variable

Select variable | Content variation | Calculated value

**Select user variable:**

User ID	review_date	review_form	subscription
form_name_op	rating_survey	market_name_2	login state
Role	<u>Company</u>	First name	account open
market	Form URL	Last vendor search	Form submitted
CRM ID	First name	Last name	Email
Phone	Birthday	Industry	

**Select session variable:**

Page view ID	First page view ID in session	Search word	Search word of first page vi...
Session counter	User country	User city	User IP
URL of current page	Referrer of current page		

**What to show when such data was not collected**

Default value:

OK

# Optional A/B Testing

Rotate users Visits Random Control Users Control Visits 4% 52% 22% 22% Turn off rotation and testing + Add group of actions

**Always shown**  
Content in this box is shown to all visitors who match this campaign audience. Drag content from here to test groups.  
n/a (n/a) n/a n/a (n/a)

DRAG CONTENT HERE  
to whole audience (100%)  
+ Add Action

**Rotation group A - 4% of the time**  
23 (0.00%) 30425 0 (0.00%) 1.50%  
DRAG CONTENT HERE  
to rotate/test  
+ Add Action

**Rotation group B - 52% of the time**  
226 (n/a) 224582 0 (n/a) 10.27%  
DRAG CONTENT HERE  
to rotate/test  
+ Add Action

**Rotation group C - 22% of the time**  
277 (n/a) 257096 0 (n/a) 12.77%  
DRAG CONTENT HERE  
to rotate/test  
+ Add Action

**AY-AY-BEBEK-GELISIMI-M3**  
Type: Banner/Popup/HTML Manager  
Created: by umut.coskun@dugun.com on Feb 17, 20  
0 (n/a) 0 0 (n/a)  
Clicks Impressions Goals  
More Statistics

**Amazon\_bebek\_17mart\_m3**  
Type: Banner/Popup/HTML Manager  
Created: by umut.coskun@dugun.com on Mar 17, 21  
23 (0.07%) 30425  
Clicks Impressions  
0 (0.00%) 1.50%  
Goals Visitors  
More Statistics

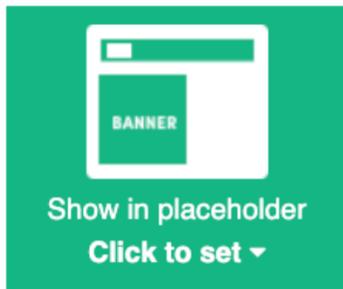
**Prima\_17Mart\_Bebek\_M3**  
Type: Banner/Popup/HTML Manager  
Created: by umut.coskun@dugun.com on Mar 17, 21  
226 (0.10%) 224582  
Clicks Impressions  
0 (0.00%) 10.27%  
Goals Visitors  
More Statistics

**Philips\_Avent\_26Mart\_M3**  
Type: Banner/Popup/HTML Manager  
Created: by umut.coskun@dugun.com on Mar 26, 21  
277 (0.10%) 257096  
Clicks Impressions  
0 (0.00%) 12.77%  
Goals Visitors  
More Statistics

Select area on the site where to show the widget.

Display settings ^

Where to show content. You can choose popup or placeholder.



### Creating new placeholder

Tell Personyze where to place your actions.  
If you already know the CSS selector of the element, type it here.  
Or click "Find on pages" to select elements visually.

I know the selector

Find on pages

Save new

Insert URL to Select Visually:

www.yoursite.com|

Open

...was closed.

...was clicked.

...was shown.

Stop showing.

...another action was/wasn't shown.

# Step 2: Display

Banners are embedded into the page using what's called a placeholder. You can create placeholders with a point-and-click interface, or manually input the selector for where you want the content to insert. Once created, a placeholder is saved forever, to be used for any content.

[Read more about setting placeholders here](#)

# Step 2: Display

This is how it looks when you set your placeholder, you point and click to a div on the page, select before, after, or replace this element, and then a box will give you a rough preview of how the content will be inserted. Note that you can always add more padding etc. to get the positioning perfect, in the main content editor.

The screenshot shows the Personyze content editor overlaid on a Gartner article titled "About the Gartner HR Trends". The article text includes: "This annual report is derived from the Gartner HR Priorities Survey on common challenges and asks them to rank their top priorities designed to offer HR leadership teams a better understanding of what their peers are focusing on in the year ahead to help drive st... This year, Gartner received responses from HR leaders across 60 c... Thirty-six percent of participants were CHROs or heads of HR."

The editor interface includes the following sections:

- PERSONYZE** logo and browser address bar showing `https://www.gartner.com/en/human-resources/trend:`
- Select the placeholder element:** "Personyze uses placeholders to show personalized content." The selected element is `H3.grid-norm.no-top-bottom.center.mg-t15`. Buttons for "Select parents" and "Reselect" are present.
- Put personalized content to:** A dropdown menu set to "Before selected element".
- Test the look:** "You can [test](#) how your content will look like". It displays a grid of placeholder boxes with dimensions: 336x280 (green), 300x250 (blue), 728x90 (red, selected), 320x100 (green), and 300x600 (orange). A "Remove" button is below the grid.
- CSS style (optional):** "Apply style when the placeholder is used." Buttons for "Text", "Box", "Other", and "Source" are at the bottom.

## Review and QA Campaign

Before publishing your campaign, you can QA by saving in testing mode so that only your IP address will see it live on the site.

### Campaign Summary

 **Your campaign is targeting**  
New visitors and Include: United States and

 **Presenting**  
1 actions

### Campaign preview options

#### Open site in preview mode using simulator

The Simulator allows you to replace any given parameter within the platform and simulate as if rules and conditions were met, therefore, triggering the execution of Actions. For example, you could simulate visits from different countries or at a different time, and see how the tested page would look under these circumstances.

URL of a page on your site:

Auto   Proxy mode   Seamless mode 

# Step 3: QA

There are 3 ways to QA:

1: Save in testing mode, it will be live on the site only for your IP address.

2. Testing link: once saved in testing mode, you'll also have a link to send to colleagues, it will be live for anyone with the link.

3. Simulator: Open in simulator mode, and Personyze will show you what's going on under the hood.

# See the banner live on your site



## Office 365 (including SharePoint Online) Reviews

4.4 ★★★★★ 6139 Reviews

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597 Verified Reviews | Review Weighting

**Filter User Reviews By:**

**Displayed Reviews**

Reviewed in Last 12 Months

**Overall Rating**

★★★★★ (2539)

★★★★☆ (2895)

★★★☆☆ (455)

★★☆☆☆ (60)

★☆☆☆☆ (8)

**Reviewer's Company Size**

<50M USD (1710)

50M-1B USD (1929)

1B-10B USD (1019)

10B+ USD (744)

Gov't/PS/Ed (552)

**Reviewer's Industry**

Services (1593)

Manufacturing (1112)

Finance (727)

[View All](#)

**Reviewer's Deployment Region**

North America (3463)

Europe, Middle East and Africa (1620)

### Office 365 (including SharePoint Online)

★★★★★

Dec 27, 2020

**Reviewer Role**  
Digital Marketing

**Company Size**  
Gov't/PS/ED 50,000 + Employees

[Review Source](#)

**The idea is to have access the data from different places or from different equipment's .**

– Senior Educational Counsellor in the Education Industry

its good for every organization from small to big enterprises.it is used across the whole company the idea is to have access the data from different places or from different equipment's its much easier and secure way to transmit the data mainly MS words or excel formats. I have less working knowledge of Excel but more advanced users can utilize Macros

[READ FULL REVIEW](#)



### Find out how Gartner verified reviewers rate the leading vendors in this market.

**Gartner Peer Insights Voice of the Customer**

Designed to complement the expert-driven Magic Quadrant, the Voice of the Customer highlights how real customers rate their experience with vendors in Social Software in the Workplace

[GET THE FREE REPORT](#)

### Office 365 (including SharePoint Online)

★★★★★

Apr 22, 2020

**Reviewer Role**

**Backbone of Our Organization, Must have this Product, Best Email service**

– Digital Analyst in the Manufacturing Industry

Microsoft Office 365 is backbone of our organization operations we all are using this complete solution there are a lot function and helpful features

Select area on the site where to show the widget.

🖥️ Display settings ^

Where to show content. You can choose popup or placeholder.



**Show in placeholder**  
Click to set ▾



Show in popup ▾

Show content in placeholder

Use existing placeholder(s)

(Choose) ▾

Create new placeholder

OK



...was closed.



...was clicked.



...was shown.



Stop showing.

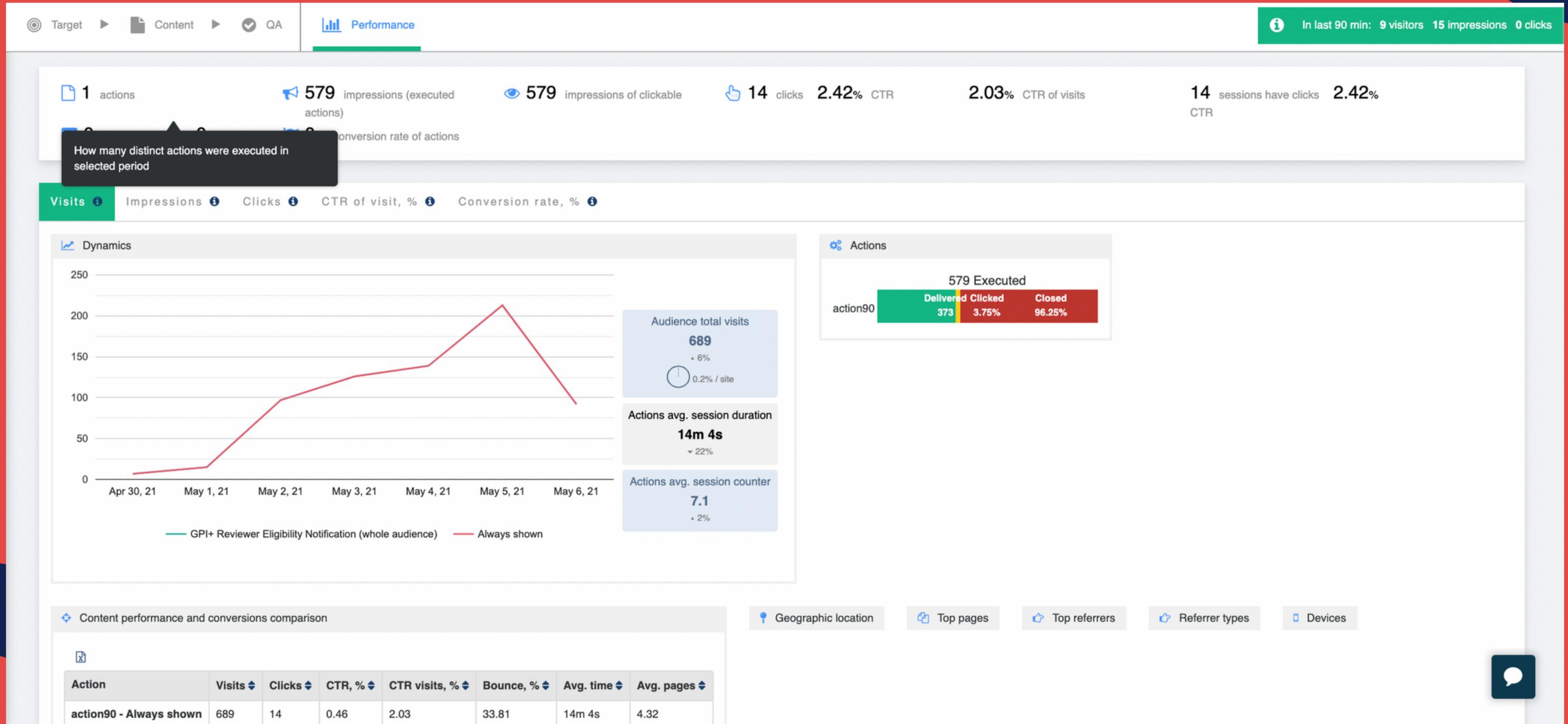
# Other types of banners:

If you want to show other types of content as banners (or in other words, embedded in your site pages), you can just use the appropriate action widget for each type in your targeting campaign, and choose placeholder from the display settings.

For instance, you can create a form to embed on your site, and select placeholder as the display setting.

# Review Performance

## Once your banner is live



[Read more about Personyze analytics here](#)



**PERSONYZE**

**IF YOU'D LIKE HELP WITH  
YOUR TARGETED BANNERS,  
LET YOUR ACCOUNT  
MANAGER KNOW.**

OR SIMPLY EMAIL:  
[SUPPORT@PERSONYZE.COM](mailto:SUPPORT@PERSONYZE.COM)

**It's as simple  
as that!**

**THANKS FOR VIEWING  
OUR PRESENTATION**