

# Use SmartSurvey to Conduct Progressive Profiling on Your Customers



Evergage automatically gathers implicit data from your customers based on their behavior such as views, view time, and clicks, but what about explicit data like who or what the customers are shopping for? Is the customer shopping for themselves or for someone else? Or are purchases personal or for work? By running progressive profiling campaigns, you can gain a better picture of who your customers are and personalize their experiences in direct relation to the responses provided.

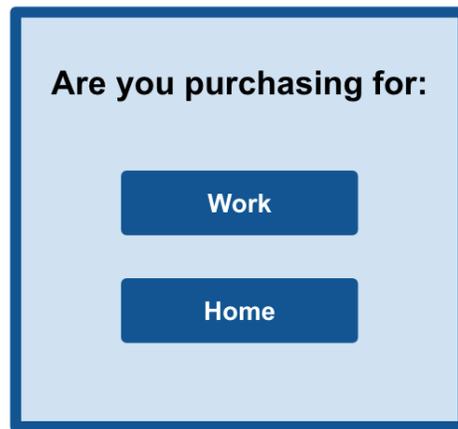
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|-----------------|---|-----------------|--------------------|
| <b>Category</b> | Progressive Profiling                           | <b>Vertical</b> | Retail, E-Commerce |
| <b>Topic</b>    | Conduct progressive profiling on your customers | <b>ID #</b>     | 2311               |

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## Example

The key with this approach is to keep things simple so it's easy for shoppers to respond. You don't want to distract them from shopping or make it too frustrating to engage with your site. A one-question survey pop-up can help customers to self-identify and serve as a base for your personalization efforts. For example, you can explicitly ask visitors who they are purchasing for then immediately personalize recommendations, offers, or entire pages based on the response provided.

Deciding when to show messages is also important, so we recommend A/B testing the timing and placement of the messages to determine the ideal strategy. For example, you might want to show a message after a customer has made a purchase or after a certain amount of browsing. You could even choose to display a message when a shopper is about to leave your site. Again, the key is to make this process easy for and not disruptive to the customer.



## Segment

You can set a goal segment of "Completed Survey" triggered by the campaign but a segment isn't always necessary

## Measure

Success can be measured by the number of responses or goal completions, balanced against the number dismissals

## Setup



## Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

1. Create a SmartSurvey and select the question type (form field, radio button, etc.)
2. Determine how many questions you want answered. Try asking an easy, one-question survey to start gathering insight.
3. Apply styling to match your brand and on-site design
4. Create a campaign and add the SmartSurvey created.
5. Apply rules to the campaign that match who you're targeting and where.
6. Test and launch!

## Reference Materials

The following articles from the *Evergage Knowledge Base* will provide process steps to help you execute this play:

- [Create or Edit a Web Campaign](#)
- [Create a Segment](#)
- [Segment Rules](#)
- [Create and Use Filters and Goals](#)
- [Create or Edit a Survey](#)