

PREPARING FOR PERSONALIZATION

Thoughts from Experience

bounteous

ABOUT US



Amanda Ruzin

SVP of Experience Design



Chris Greatens

VP, Drupal Engineering

WHO WE ARE

We bring together engineers, data scientists, marketers, analysts, strategists, designers, and digital specialists, whose combined expertise, ideas, and innovation enable us to **succeed where others fail.**

500 collaborative, on-shore team members

20+ years of content, commerce, creative, & conversion

15+ years average experience

1,000+ analytical & advertising minds trained annually

90%+ employee retention rate

200K blog impressions monthly



SAN FRANCISCO

DENVER

CHICAGO

PITTSBURGH

TORONTO

WILMINGTON

COMPANIES WE'VE HELPED WITH DRUPAL



EVERYONE IS TALKING ABOUT

PERSONALIZATION

2015

PERSONALIZATION TRENDS

Personalization is being prioritized due to its impact on customer experience

89%

of eBusiness and channel strategy professionals plan to invest in personalizing the customer experience in 2016/2017.

Source: Forrester's Q2 '16 Global eBusiness And Channel Strategy Professional Online Survey

77%

of consumers have chosen, recommended, or paid more for a brand that provides a personalized service or experience.

Source: Forrester's North American Consumer Technographics Brand Compass Survey Q3 '15

2017

TRENDS IN PERSONALIZATION

What is our objective?

How will it help our customer?

- Increased conversion rates
- Fewer customer complaints
- Increased satisfaction
- Higher task completion rates



I have information to help you



I can simplify things for you

ACQUIA
EXPERIENCE DIGITAL FREEDOM

6 PERSONALIZATION TRENDS YOU NEED TO KNOW



2020 CMO PREDICTIONS

Content Overload, Advocacy, Customer Data & Personalization Remain Top Priorities

IN A NUTSHELL

If you knew everything about an individual, how would you change that person's experience?

IF YOU HAD PERFECT INFORMATION...

Hide the wrong
information

Make the right
recommendation

Incorporate
preferences

Show better, relevant
information

Simplify the
experience

Send the right
message

SO LET'S TALK ABOUT SOMETHING ELSE

We're not here to tell you that you should start doing personalization today.

WHAT WE ARE SAYING

A bit of preparation will make personalization easier when you're ready.

AGENDA

GET EXCITED

01 Collaborate

02 Evaluate

03 Hypothesize

04 Prioritize

05 Plan

01

COLLABORATE

**Personalization
is a team sport.**



The best solutions happen when you bring people across disciplines together.

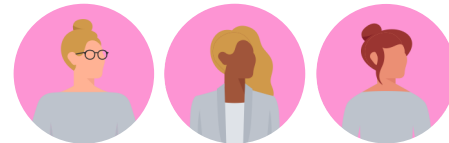
SILOED



Analytics Team



Marketing Team



Experience Team

INTEGRATED



CX Team

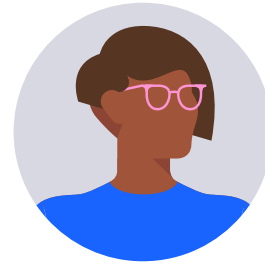
GATHER YOUR PERSONALIZATION TEAMMATES



ANALYTICS



MARKETING



XD

GATHER YOUR PERSONALIZATION TEAMMATES



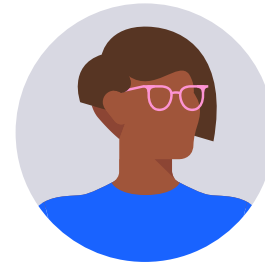
CUSTOMER SERVICE



ANALYTICS



MARKETING



XD



PRODUCT



ENGINEERING



BUSINESS



RETAIL



SEO



STRATEGY

EXERCISE

Persona Definition



Leon Burns
VP of Marketing

PERSONAL OBJECTIVE

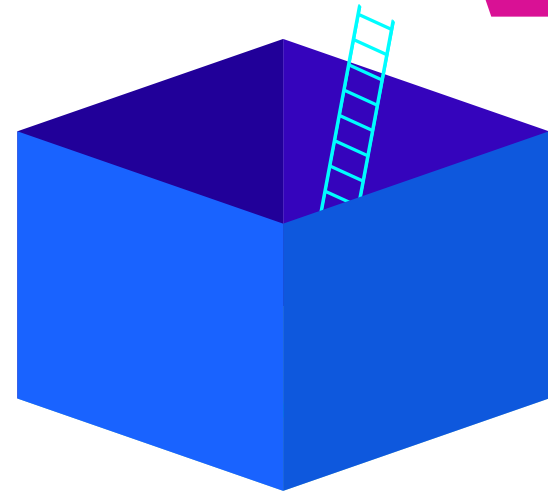
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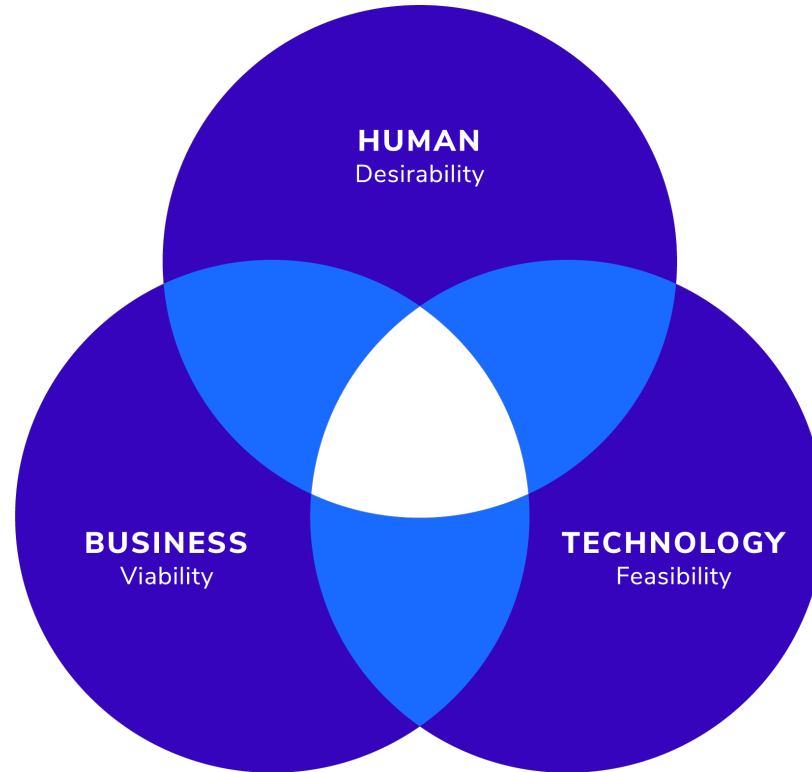
GOALS	CURRENT BEHAVIOR	OBSTACLES	OPPORTUNITIES

**Learning from
people with
different
perspectives
helps break you
out of the box...**



**Lesson
Learned!**

...AND MAXIMIZE OUR POSSIBLE SOLUTION SET



**Having a
personalization
initiative doesn't
just mean it's a
"Drupal
initiative"**



**Lesson
Learned!**

02

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EVALUATE

We want to do a personalization project... now what?

ARE YOU READY?

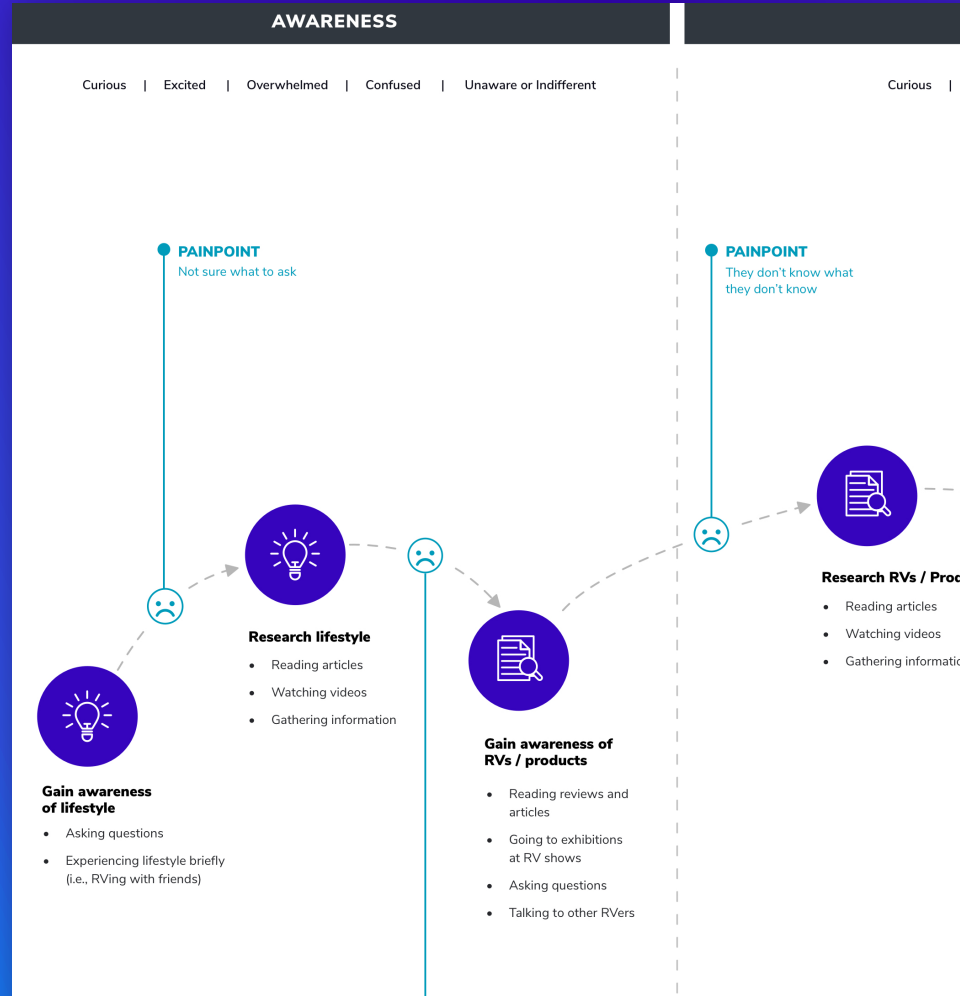
- Do you have the right team in place?

ARE YOU READY?

- Do you have the right team in place?
- Do you have a shared understanding of your users and journeys?

Look at your experience holistically.

- Across customer lifecycle
- Across touchpoints
- Across systems
- Among external and internal users 🍷



**Data and insights
identify the
moments that
matter.**



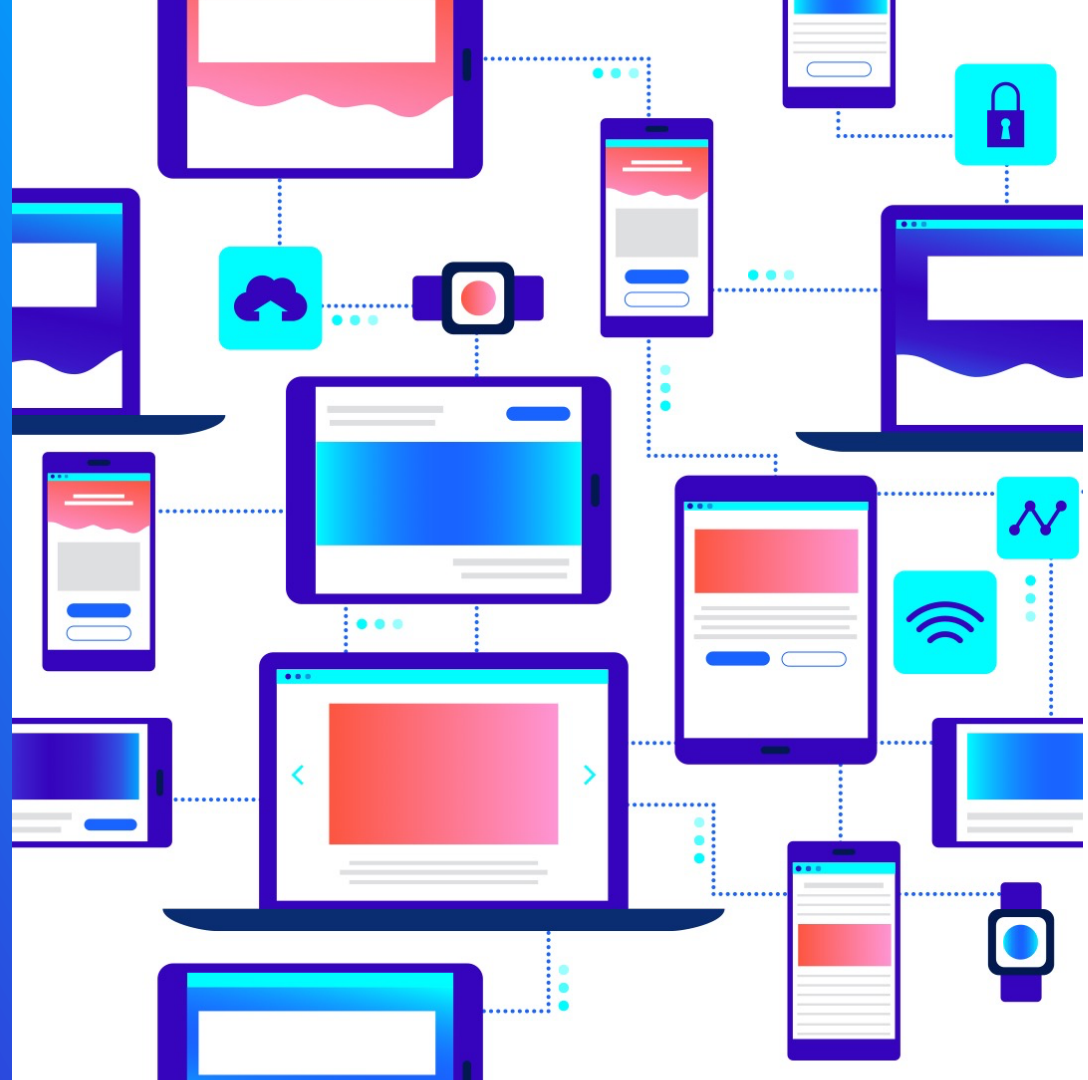
**Force yourself to
choose your
moments that
matter before the
project kickoff**



ARE YOU READY?

- Do you have the right team in place?
- Do you have a shared understanding your users and journeys?
- Is your design and content ready for personalization?

**Think in systems.
Let go of the page.
Decouple content.**



ARE YOU READY?

- Do you have the right team in place?
- Do you have a shared understanding of your users and journeys?
- Is your design and content ready for personalization?
- Do you already have a personalization tool?

IS YOUR DRUPAL PLATFORM READY?

- How are your pages built?

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- Is your JavaScript ready for your personalization tool?

IS YOUR DRUPAL PLATFORM READY?

- How are your pages built?
- How easy is it to target content within a page on the site?
- Does the site create dynamic content (and how will your personalization tool handle this)?
- Is your JavaScript ready for your personalization tool?
- Is your content tagged with keywords, personas, or segments?

**Reduce the
friction for
adding new
content to your
Drupal site**

**Lesson
Learned!**



Have a page layout that anticipates your personalization needs.



**Lesson
Learned!**

03

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HYPOTHESIZE

If you knew everything about an individual, how would you change that person's experience?

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TYPES OF PERSONALIZATION

Rule-Based



Predictive

Segments



Hyper-
Personalized

PERSONALIZATION CAN SCALE

**Personalization can
begin at the very
earliest stages of
experience
development.**

Welcome, human.

Welcome, desktop user.

Welcome, Chicago traveler.

Welcome, past customer.

Welcome, cancellation receiver.

Welcome, Outdoors enthusiast.

Welcome, Amanda Ruzin.

DECIDING WHAT TO TEST

There's a lot to consider when deciding what to test:

- Follow the Money/Value
- Fix Problems First
- Audit / Expert Review
- Usability Testing
- Use Your Analytics Data

[Goal definition.]

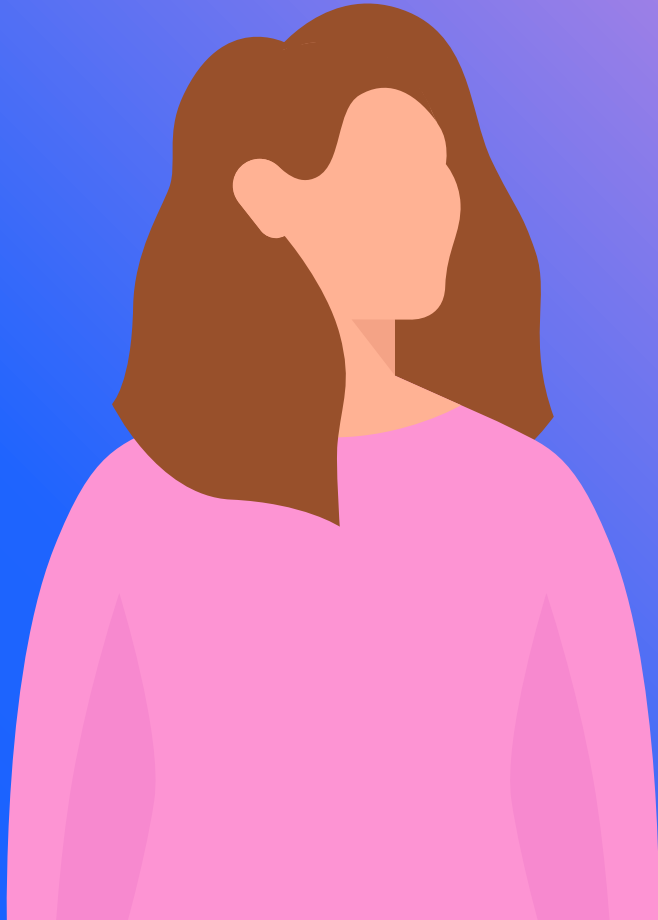
[Evidence].

If [action], then [testable
outcome].

GOAL

“

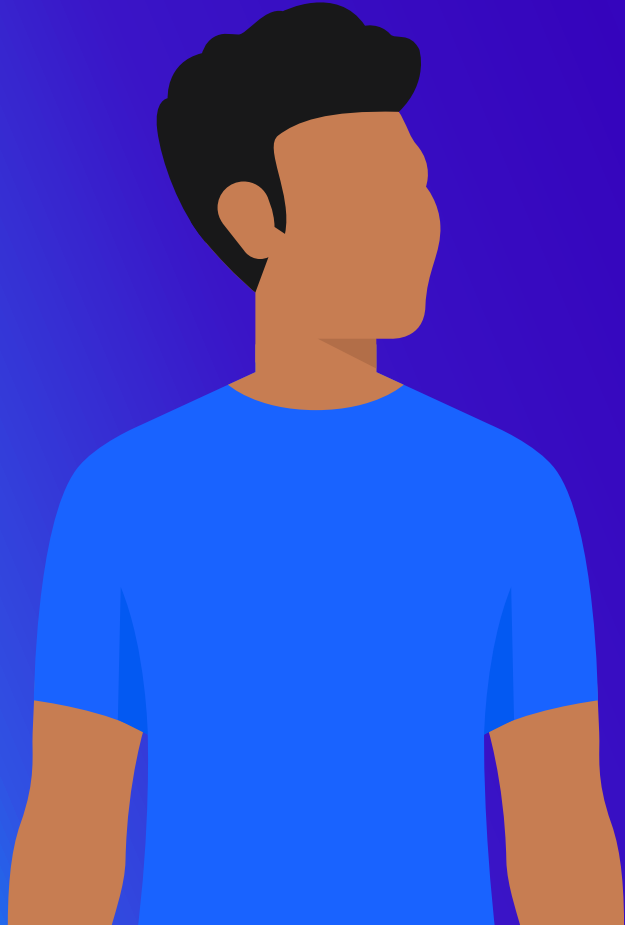
We want to increase the number of people who register for our Knee Replacement seminars.



EVIDENCE

“

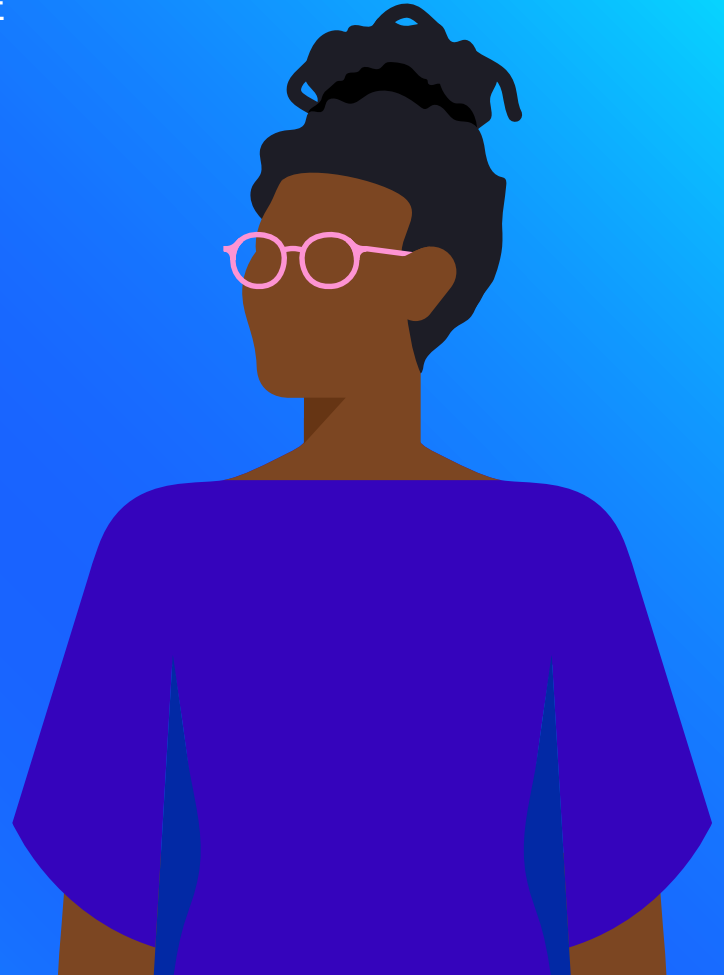
People who follow through with knee replacements visit the website an average of 3 times before registering for a seminar.



EVIDENCE

“

**“Knee replacement”
is one of our top
site searches.**



EVIDENCE



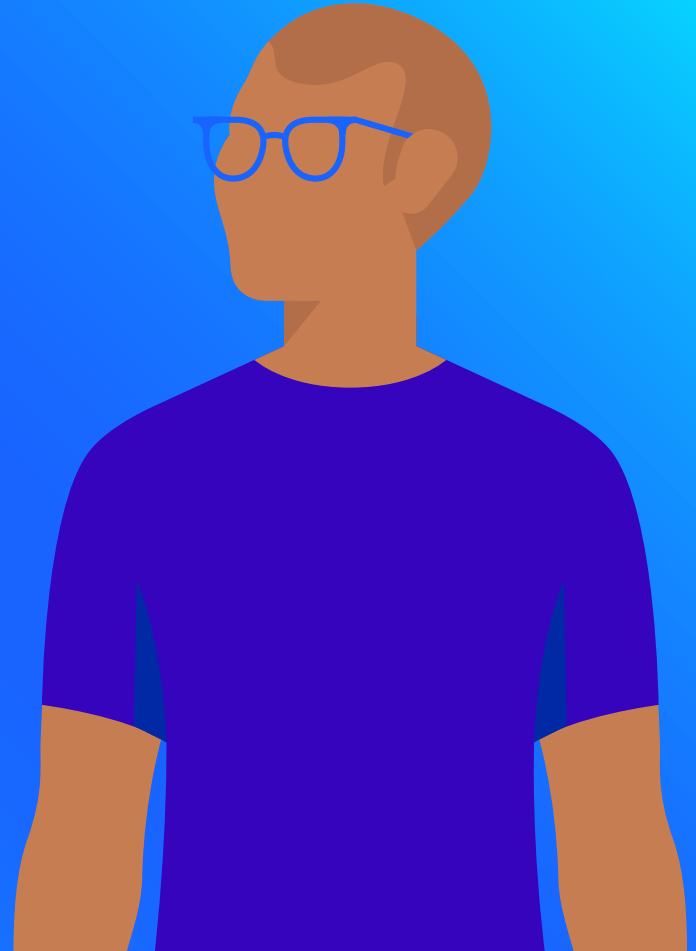
“

**We already run email
marketing and paid
search campaigns for
our Joint Replacement
Center**

HYPOTHESIS

“

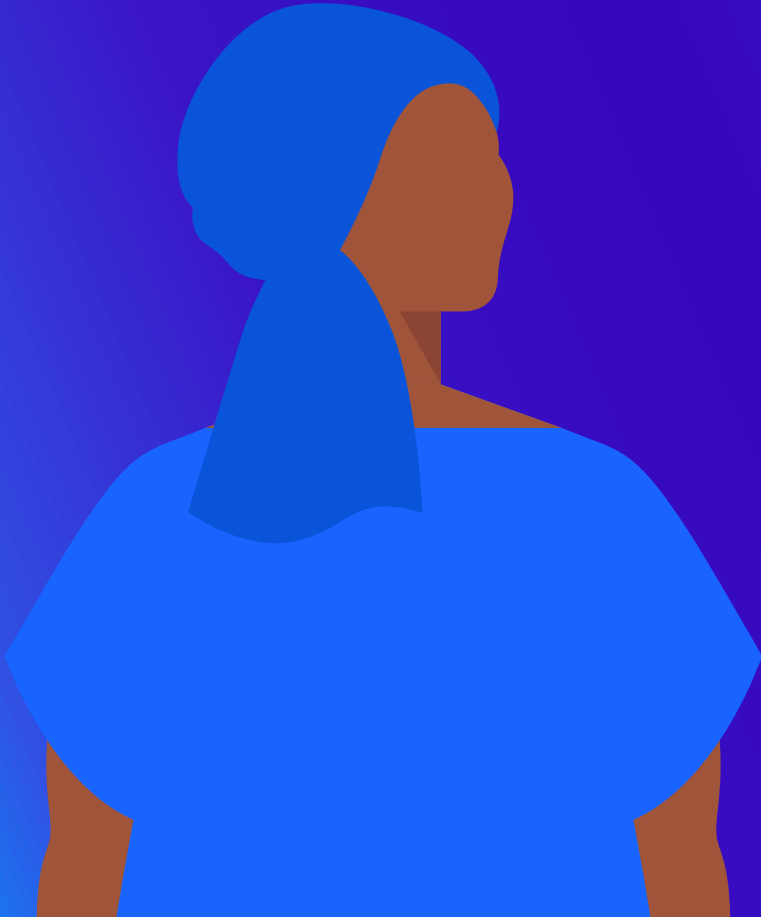
If someone has searched for “knee replacement” or has visited the Joint Replacement Center landing page, they’re a probable candidate



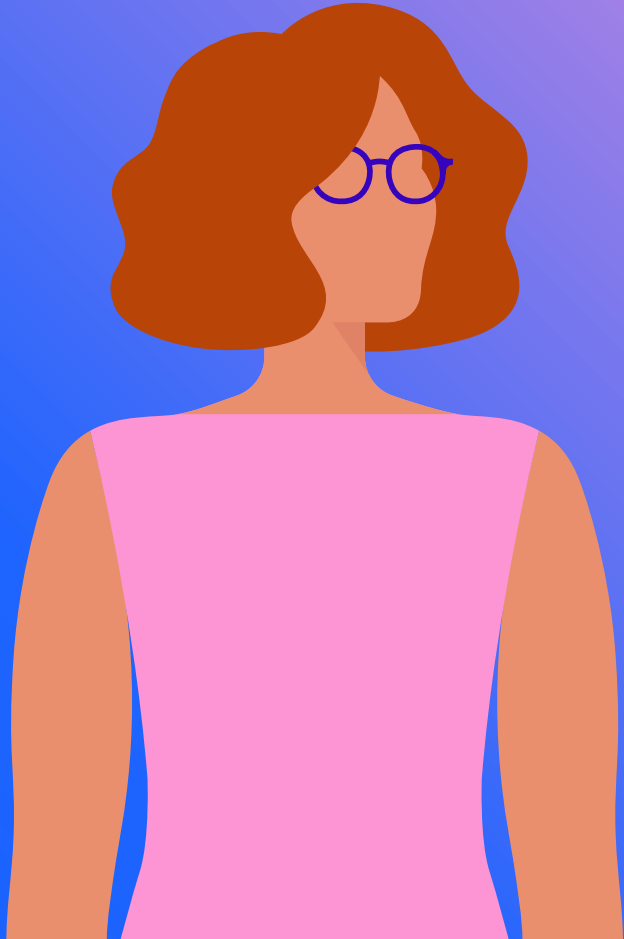
HYPOTHESIS

“

If we know someone is in the “knee replacement” segment, we could improve conversions by following up with email.



HYPOTHESIS



“

If we know someone has engaged with knee replacement content, we could promote seminar registration on the homepage.

**Lesson
Learned!**

If you're starting on a personalization project, make sure you know what hypothesis you're testing.

But, why?



04

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PRIORITIZE

**How do I balance
opinions of what
test to do first?**



HOW MUCH TRAFFIC DO I NEED?

Lower Traffic



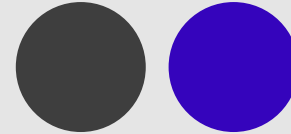
Greater Change

OR



Longer Wait

High Traffic



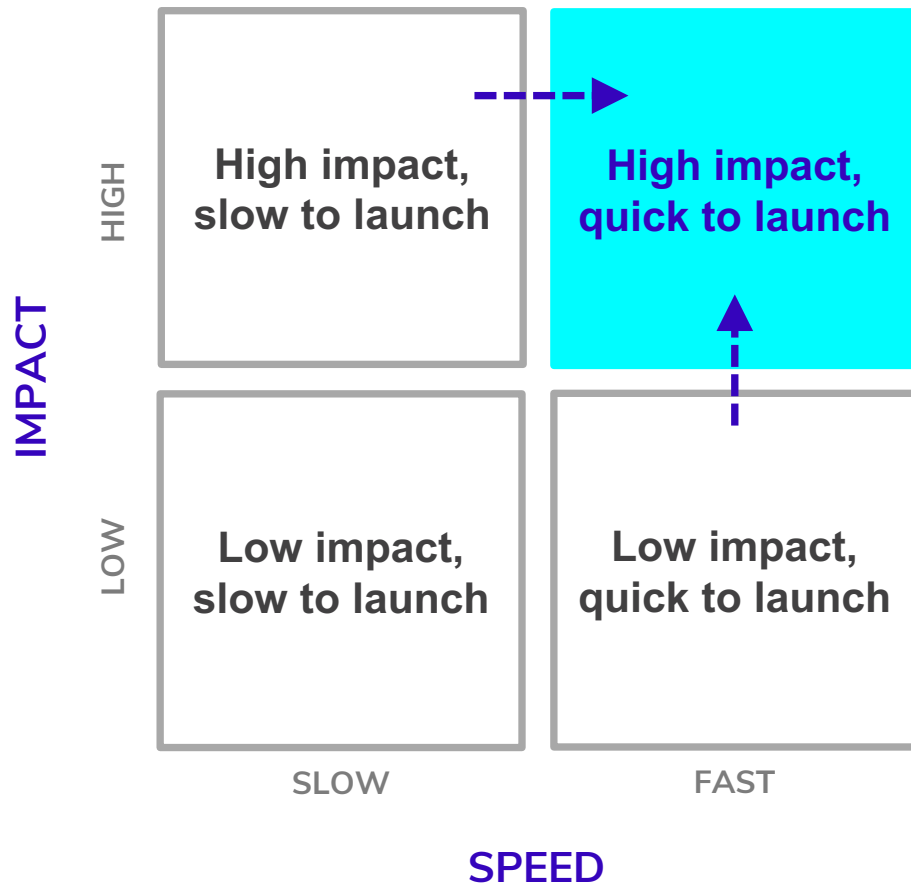
Less Change

OR



Shorter Wait

TEST PRIORITIZATION



PIE FRAMEWORK



Potential

How big of an uplift do we estimate that the changes will bring?



Importance

How much traffic does the page get and are you investing a lot to get those visitors?



Ease

How simple is it to implement the fix?

ICE FRAMEWORK

Impact

How big is the potential impact of this idea?

1-10 

Confidence

How confident are you that this idea is going to work?

(based on empirical evidence such as data analysis, industry benchmarks, published case studies, knowledge of previous experiments)

1-10 

Ease

How easy is this idea to implement?

(measure of time and resources – marketing, design, engineering – needed to run the experiment)

1-10 

ICE Ranking (sum of scores): 3 to 30

Identifying differences in prioritization provides an opportunity to learn from each other.



Lesson Learned!

Focus on the
Moments that
Matter: **Don't
boil the ocean.**

Lesson
Learned!

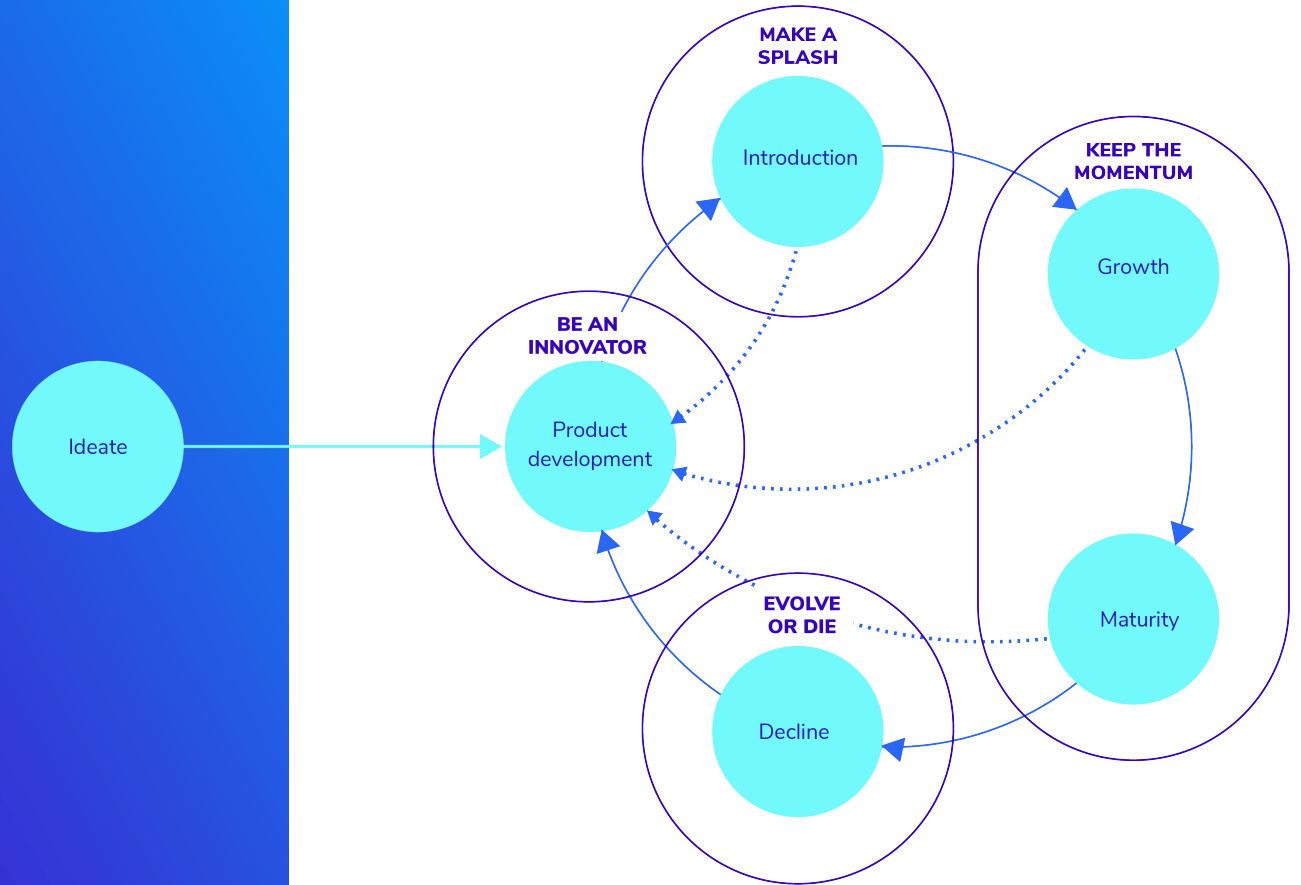
A photograph of a sunset over the ocean. The sun is low on the horizon, creating a warm, golden glow. The water is dark blue with white foam from the waves. In the background, there are dark, silhouetted rocks or mountains. A pink, multi-pointed starburst graphic is overlaid in the top right corner, containing the text 'Lesson Learned!'.

05

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PLAN

**Digital
experiences
are never
“done.”**



PERSONALIZATION MATURITY

Personalization happens in a variety of ways with the goal to drive hyper-personalized experiences along the customer journey.

Crawl



Geolocation



Marketing Campaigns



Visit Frequency



Device / System

Walk



Browsing Behavior



Pages Viewed



Known Information



Completed Events

Run



CRM Integration



Cross-Channel Behavior



Combination of Above

**Lesson
Learned!**

**It's all about
communication.**



**Lesson
Learned!**

**It's all about
communication.**

**And planning
together.**





EXTRA LESSONS LEARNED

THANK YOU

Any questions?

Amanda Ruzin

SVP of Experience Design
amanda.ruzin@bounteous.com

Chris Greatens

VP of Drupal Engineering
chris.greatens@bounteous.com

bounteous