



This Time, It's Personalized

Preparing Your Site for Effective
Personalization

AGENDA

1. What is Personalization (& Why Should We Care)?
2. Planning for Personalization
3. Sustaining Your Strategy
4. Implementation Options
5. Conclusions

1. Why Personalization?



CHALLENGES

- How to engage users with divergent needs within a single site
- How to improve content discoverability in sites with hundreds (or thousands) of pages
- How to accommodate users who may have longer decision cycles

STANDARD PAGE

Helping students succeed and thrive at UCSF, in the Bay Area and beyond.

Prospective graduate student?
View [UCSF admissions information here](#).

Student Academic Affairs
University of California, San Francisco
500 Parnassus Avenue
San Francisco, CA 94143



Insider Profile

“Spend time making friends. They will be your greatest asset for stress management.”



[Caitlin Hildebrand](#) | Graduate Division | Class of 2015

Insider Tips of the Week



Find researchers with shared interests via [UCSF Profiles](#) — a search tool designed to locate investigators based on their research expertise.

Student Tools

Campus Resources

- Academic Calendar
- Admissions
- Campus Calendar
- Campus Maps
- Campus News
- Campus Online Store
- Course Catalog
- Featured Academic Events
- Fitness Schedules
- Information Technology
- My Access
- Schedule of Classes
- Shuttle Schedule
- Student Portal
- UCSF Directory
- UCSF Email
- UCSF Library
- UCSF Police Department
- UCSF VPN

Student Inside Line



Can't find what you're looking for?

FOR INTERNATIONAL VISITOR

It looks like you're coming from China. You may be interested in our [programs for international students](#).

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LESS BRAZEN VERSION

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Programs for International Students

Learn more about our [international programs](#).

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Student Inside Line



POTENTIAL OUTCOMES

- Give your users what they are looking for, at the right time and in the desired format
- Improve retention & conversion
- Increase user satisfaction

POTENTIAL OUTCOMES

- Organizations using personalization are seeing a 19% increase in conversions (Source: Monetate/eConsutancy)
- Calls to action targeted to the user had a 42% higher conversion than calls to action that were the same for all (Source: HubSpot)

WHY ISN'T EVERYONE DOING IT?

- Limited time and budgets, competing priorities
- Technology barriers
- Not knowing where to start:
 - How to implement
 - What to implement
 - How to measure success
 - How to sell it internally

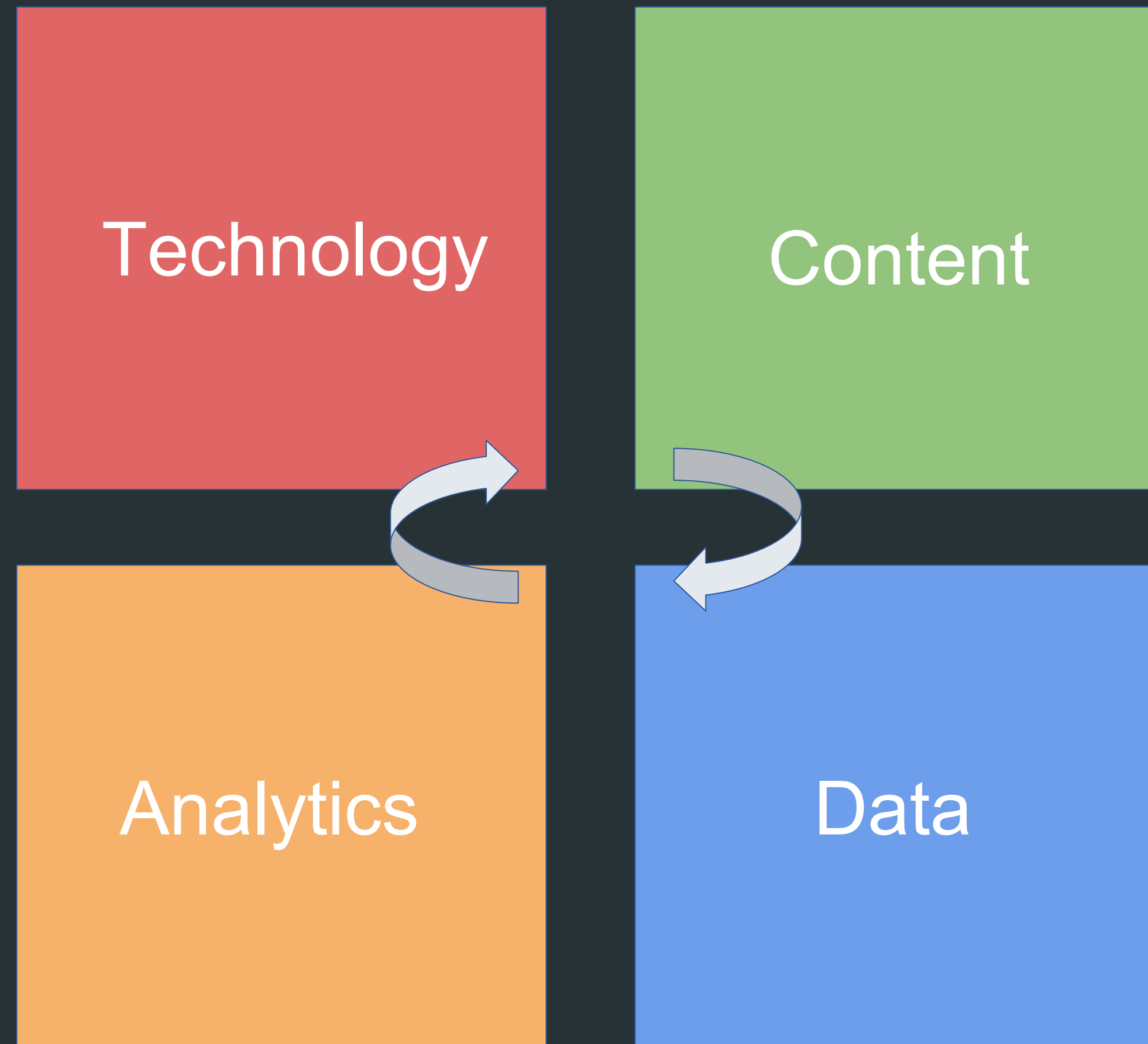
A person is sitting at a desk, using a laptop and a smartphone. The laptop screen displays the OpenEDU website, which features the logo 'IMAGEX' and the text 'OpenEDU One Size Doesn't Fit All. OpenEDU is a modular, open source framework tailored to the uniqueness of higher education websites.' The smartphone screen shows a mobile version of the same website. The person is wearing a watch on their left wrist. The background is a wooden desk with a notebook and a pen.

2. Planning for Personalization & Getting Started

EFFECTIVE PERSONALIZATION REQUIRES PLANNING

- **There are incremental steps we can take** which set us up for success
- **First the strategy and perspective need to be right**, then we can layer in technology

DIMENSIONS OF PERSONALIZATION



BEFORE BEGINNING WITH TECHNOLOGY...

Need to understand the audience and context:

1. What are the business needs?
2. Who are the users and what do they want?
 - What key content will help them achieve goals?
 - What friction is blocking them from achieving those goals?

SOME ACTIVITIES TO PREPARE FOR PERSONALIZATION

1. Identify organizational and user goals
 - Key segments
 - Value propositions
2. Develop personas
3. Map user journeys
4. Gather user feedback

1. Identify business and user goals

Goal: establish organizational context, identify overlap between institutional needs and user needs

1. Who are our users?
2. What benefits can we offer them?
3. How can we reach them?



STRUCTURE NAME
Q/A
ATS

PERSONA PRIORITIZATION FOR THE WEB

①

UNDER GRAD PROSPECT

②

(UG & G) PROSPECTIVE
INTERNATIONAL

③

PARENTS
OF
PROSPECT

④

PROSPECTIVES
GRAD STUDENTS

⑤

~~UNDER GRAD~~ CURRENT
STUDENT

⑥

ALUMNI

⑦

DONOR

⑧

ADULT STUDENT

⑨

FACULTY & ST

EXHIBITION

DONATE/G

TOUR
PAGE

ENDAE
EDALER TOOL

Con
a ba
alumn
artist

Desktop
Nice that
DEUS + BEEN
can be seen
right away

VALUE PROPOSITIONS

Core Studies	Niche College	Work ethic of students	Design emphasis	Community that connects	Practical Learning	SAFE CENTRALIZED CAMPUS
SAFE ATMOSPHERE FOR LIVING & LEARNING	A COMMUNITY PARTNER	A "FREE THINKING" ENVIRONMENT	HANDS ON CULTURE	CLOSE INTERDISCIPLINARY ARTS AND DESIGN CAMPUS	SITUATED IN VIBRANT ARTS CITY	COMPETITIVE SUCCESS IN REGIONAL AND NATIONAL COMPETITIONS
LONG ESTABLISHED HERITAGE	Professional Level Programs	Diversity of Art + Design Programs	Tools for Success	Results that matter	Evidence of Success of Alumni	Passionate ^{Professional} Faculty + Staff
Great Community - Columbus + Campus that connects	World class education at middle class price	You won't be living in your parents' basement (High employment)	We teach you how to see	Small Campus w/ adjacent Museum	Located in an Urban Setting	Prot: Student ratio
Connected to Columbus Creative Community						

2. Develop user personas

Goal: establish key audience types and what is motivating them to visit

1. What are the key audience types that we want to connect with?
2. What are their goals and motivations?
3. What are their anxieties? How can we alleviate them?



Sarah, Potential Student

Demographics

- 24-35 years old
- Male or Female
- Currently holds a Graduate level degree in the Science or Technology fields

What brings the user to the site?

- Wants to find a top research university in order to gain post-graduate degree
- Wants to contribute to their respective fields in Science or Technology
- Looking to take the next step in education and career
- Wants a university with high placement after degree is achieved
- Wants an organization that has the top-of-the-line facilities in order to conduct research and further educational opportunities



3. Map user journeys

Goal: for each persona, identify pathways to achieving their goals

1. What routes will they take to achieve goals?
2. What is getting in the way of their goals?
3. What content will need to be created to support this journey?

Heard from friend

Visit Website "Home"

Search Nursing Program
↓
Nursing Home page

Spirituality
Pictures
Video
Testimonials
Service opp.
Comm. Service

Look at instructors
Contact advisor

Accepted transferred credits

finances
\$

Professor Profiles
Scholarships
financial help
length of program
Photos of campus, etc.

Application Steps

Steps
(easy :)
Plan of courses

Call and talk to staff

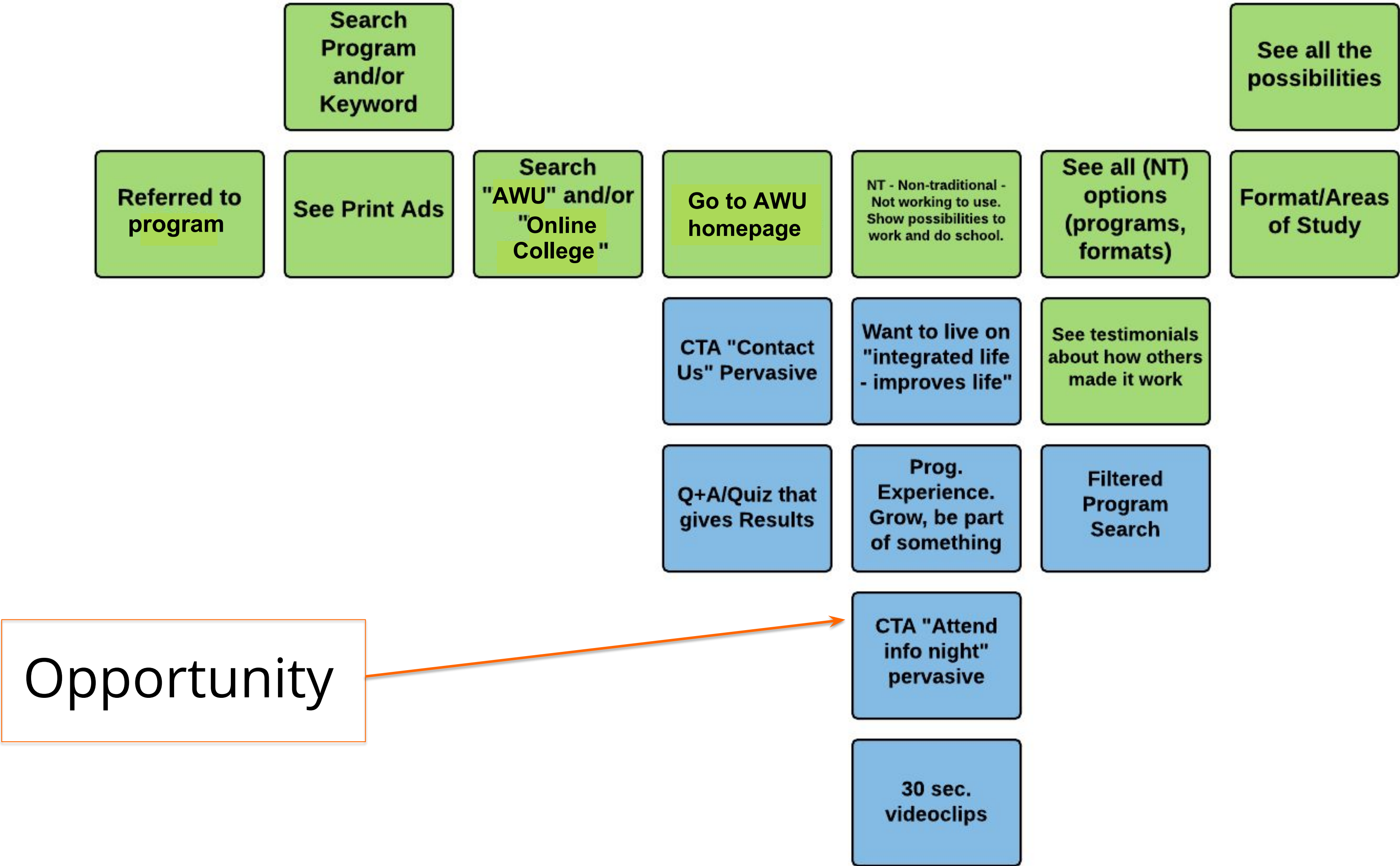
Visit campus

Virtual tour
(related specifically to nursing)

Apply to SWAU
YAY!!!
☺

Enroll at SW

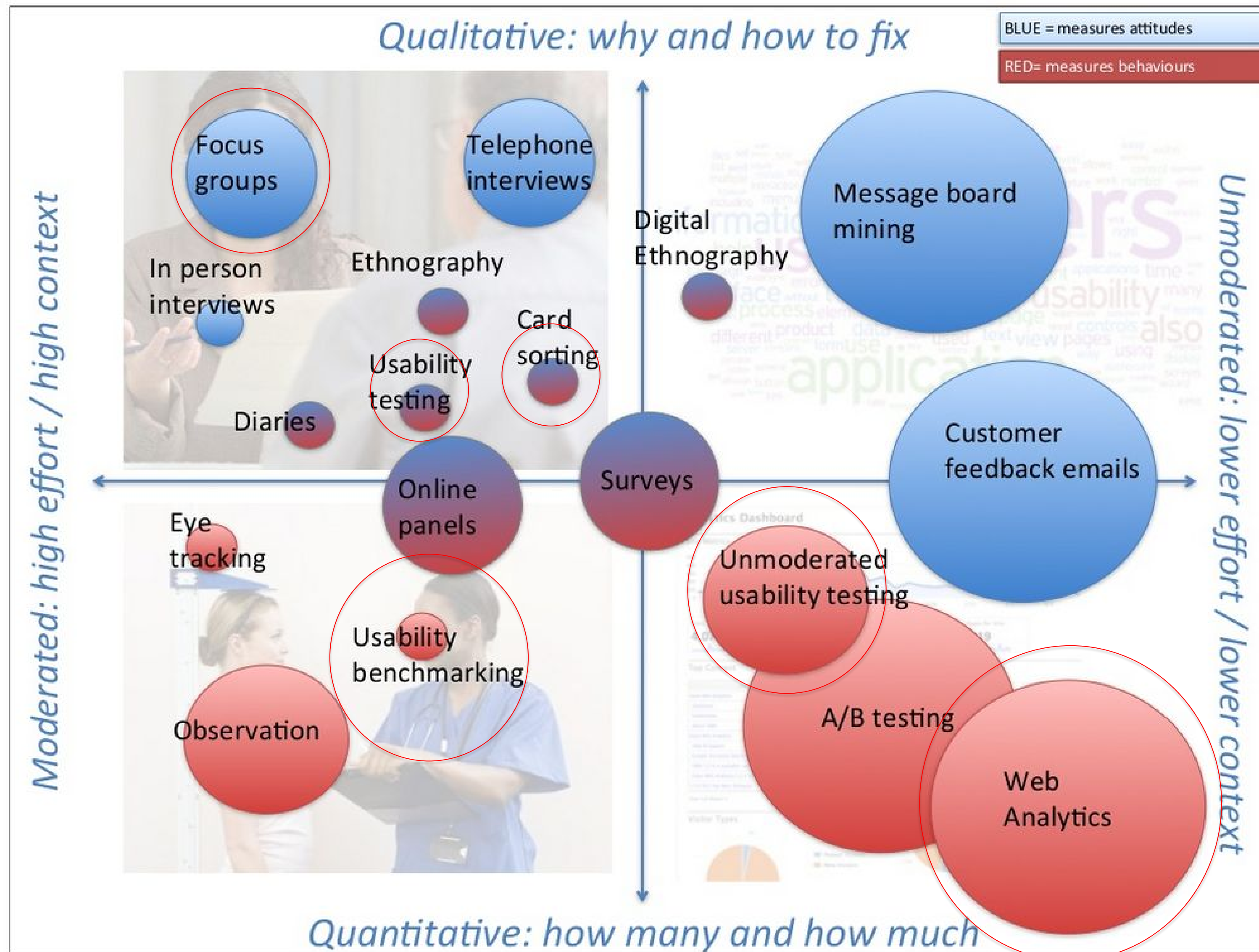
Pete Possible, Experience Map



4. Gather user feedback

Goal: validate hypotheses generated, identify issues with the current site

1. What is blocking users right now?
2. Is our proposed direction right?
 - Is this the right design / right content?



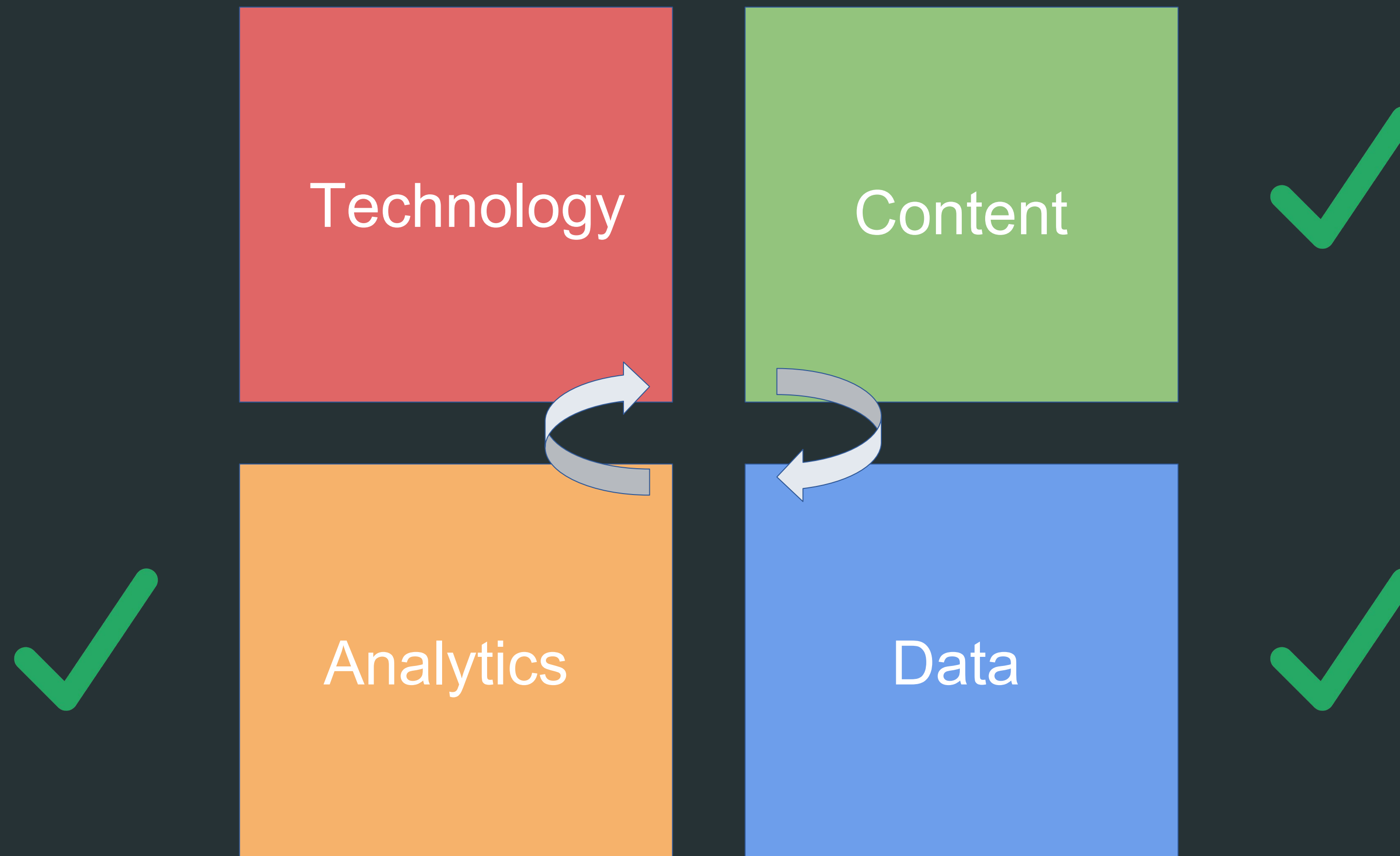
Outcomes

1. **Understand what users value** (and what they don't)
2. **Understand sequence and priority**
 - what they need to see first, second etc.
3. **Understand how they want to receive information**
 - video, chart, testimonial, image gallery
4. **Improve buy-in**
 - urgency is easier to communicate once you have data

3. Implementing personalization

A person is shown from a top-down perspective, sitting at a desk. They are holding a smartphone in their right hand, which displays a mobile version of a website with the heading 'YOUR LIFE BEGINS HERE'. In the background, a laptop screen displays a desktop version of the same website. The laptop screen features the 'IMAGEX' logo, a navigation menu with 'APPROACH', 'SERVICES', 'WORK', 'ABOUT', 'USERS', and 'BLOG', and a main section titled 'OpenEDU One Size Doesn't Fit All.' with a sub-headline 'OpenEDU is a modular, open source framework tailored to the uniqueness of higher education websites.' and a 'Contact Us to Learn More' button. The person is wearing a dark watch on their left wrist. The overall scene is dimly lit, with the primary light source coming from the screens.

DIMENSIONS OF PERSONALIZATION



STRATEGY: READY FOR AUTOMATION

- With a framework of content, meaningful data and analytics, you can now layer in technology.

Use Case	Content Strategy
User from China	<ul style="list-style-type: none">• Show international program information in main 'hero' area• Emphasize academic reputation• Emphasize safety
Visitor to Nursing program	<ul style="list-style-type: none">• On subsequent visit:<ul style="list-style-type: none">• Display testimonial featuring Nursing student on 'About' page

TECHNOLOGY: IMPLEMENTING PERSONALIZATION

Options in Drupal:

Products

- Acquia Lift (D8)

Contributed modules

- Personalization, Personalize (both D7 only)

Custom solutions

- Drupal taxonomy, geolocation etc.

Drupal-specific options

TECHNOLOGY: IMPLEMENTING PERSONALIZATION

CONTACT US

1 (888) 310-0589

GET A DEMO

USER LOGIN



WHY EVERGAGE

SOLUTIONS

PLATFORM

RESOURCES

BLOG

The Real-Time Personalization Platform

Only Evergage provides marketers with **The Power of 1**.

Using advanced machine learning, you can understand and interact with each customer and visitor – one at a time, “in the moment” and at scale – to deliver the most relevant, individualized experience.

EXPLORE THE POWER OF 1

The Forrester Wave™: Digital Intelligence Platforms, Q2 2017



Your Downloads <

Third-party options

TECHNOLOGY: IMPLEMENTING PERSONALIZATION

Qubit.

Product ▼

Success stories

Resources ▼

About ▼

Login

Personalization

Deliver highly persuasive personalization at scale

Really persuasive, not nearly

Male wedding shoes

Search

UNION

Shop Now

Third-party options

TECHNOLOGY: IMPLEMENTING PERSONALIZATION

The screenshot displays the Qubit user interface. On the left is a dark sidebar with navigation options: Overview, Experiences (highlighted), Segments, Insights, Data Center, and Events. The main content area has a white background with a top orange header bar. The header bar contains the title "New customer non purchasers" and a "Save and preview" button. Below the header, there are two main columns. The left column contains two white boxes: "Recommendations experience" with instructions to configure integration settings, and "Technical implementation" with instructions to complete the setup using JavaScript. The right column is titled "Configuration" and contains several sections: "Strategy" with a dropdown menu set to "Viewed together by a segment", "Recommendation logic" with a dropdown menu set to "Everyone", "Title" with a text input field containing "You might also like", and "Number of products" with a dropdown menu set to "5".

Qubit. Uni

New customer non purchasers
Last updated by Qubit team on August 18, 2016

Save and preview

Recommendations experience
Configure your integration settings, then send the experience to a developer to complete the technical implementation setup.

Configuration

Strategy
Base recommendations on previously viewed or purchased products

Viewed together by a segment

Recommendation logic
Choose a particular segment that will influence the recommendations

Everyone

Title
Choose the text that is displayed with your recommendations

You might also like

Number of products
Set the total number of products to display

5

Experiences

Overview

Segments

Insights

Data Center

Events

Last edited by Mark Smith
At 18:03 on 02 July 2016

Edit

Edit this solution's Global Configuration settings

4. Sustaining Your Strategy

The image shows a person's hand holding a smartphone in the foreground, displaying a mobile-optimized website. In the background, a laptop screen shows the desktop version of the same website. The website features a header with the 'IMAGEX' logo and navigation links for 'APPROACH', 'SERVICES', 'WORK', 'ABOUT', 'CAREERS', and 'BLOG'. A main section titled 'OpenEDU' includes the tagline 'One Size Doesn't Fit All.' and a description: 'OpenEDU is a modular, open source framework tailored to the uniqueness of higher education websites.' Below this is a 'Contact Us to Learn More' button. The mobile view shows a 'YOUR LIFE BEGINS HERE' section with a grid of articles, one of which has the headline 'Good night's sleep helps the birds learn new tasks.' The person holding the phone is wearing a dark watch on their left wrist. The overall scene is dimly lit, suggesting an office or study environment.

HOW TO KEEP PERSONALIZATION SUSTAINABLE

- Resources are always limited
- How do we include personalization into existing process in a way that will become habitual and supported?

HOW TO KEEP PERSONALIZATION SUSTAINABLE

1. Take small, incremental steps (start with one :)
2. Measure the effectiveness of these steps
 - Report back on findings
 - This helps with buy-in, motivation
3. Focus effort on activities with the highest ROI
 - Careful of over-reliance on the *what* of behavior over the *why*
 - Focus effort on optimization over variety

USE ACTIONABLE SOURCES OF DATA

- Do customer research:
 - Set up a user “CAB” or focus group
 - Set up a booth and offer a pastry 😊
 - Qualitative data is often more actionable: we understand the *why*, not just the *what*

CONCLUSIONS

1. Personalization has solid ROI
2. Outcomes are improved by understanding users and their motivations
3. The best ideas often come from talking to users, not looking at graphs and funnels
4. When beginning personalization, start small and be sure to measure
 - Better to test 1-2 changes and measure than to make many changes and fail to track them

Questions?