User Experience, Web Design & CRO

Session 12

Identity Management and Resolution

CONTENTS

Contents:

1. ID management: the base of Personalization
2. ID Deterministic resolution
3. ID Probabilistic resolution
4. Tools & Tips for ID management

Session 12

ID Management and Resolution

ie
SCHOOL OF
HUMAN SCIENCES
& TECHNOLOGY

Short readings
Session 12 – Identity Management and Resolution

Other complementary readings are reflected in each slide of the session.

PDFs and other materials are uploaded in the Campus

1. What is an Identity Graph. Signal. 2017. (pdf)
2. How Adobe has implemented their deterministic and probabilistic algorithms for Identity resolution?. Adobe / Medium.

    https://medium.com/adobetech/adobe-experience-platform-identity-graph-is-the-foundation-for-the-unified-profile-e8435d26dce7
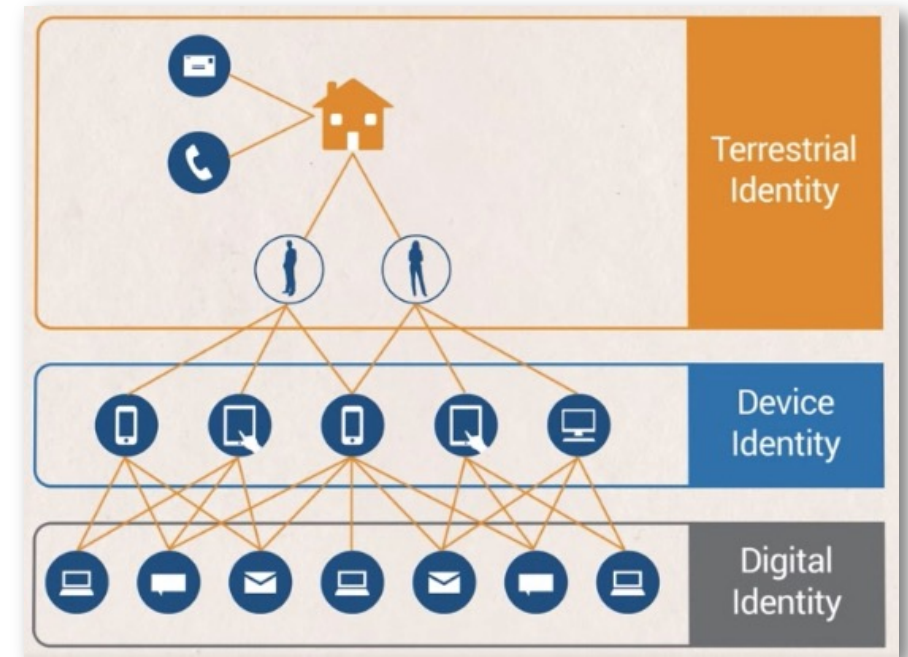
Contents:

1. ID management: the base of Personalization
2. ID Deterministic resolution
3. ID Probabilistic resolution
4. Tools & Tips for ID management

Definition of Identity and Identity Graphs

- **Identities** define **Personas**
- Identities are in a continuum from **Anonymous** (cookies, device Ids or other) to **Known**
- Usually Identities does not match with real Personas
- **Identity Graphs** are groupings of Identities with the aim of Identify real Personas
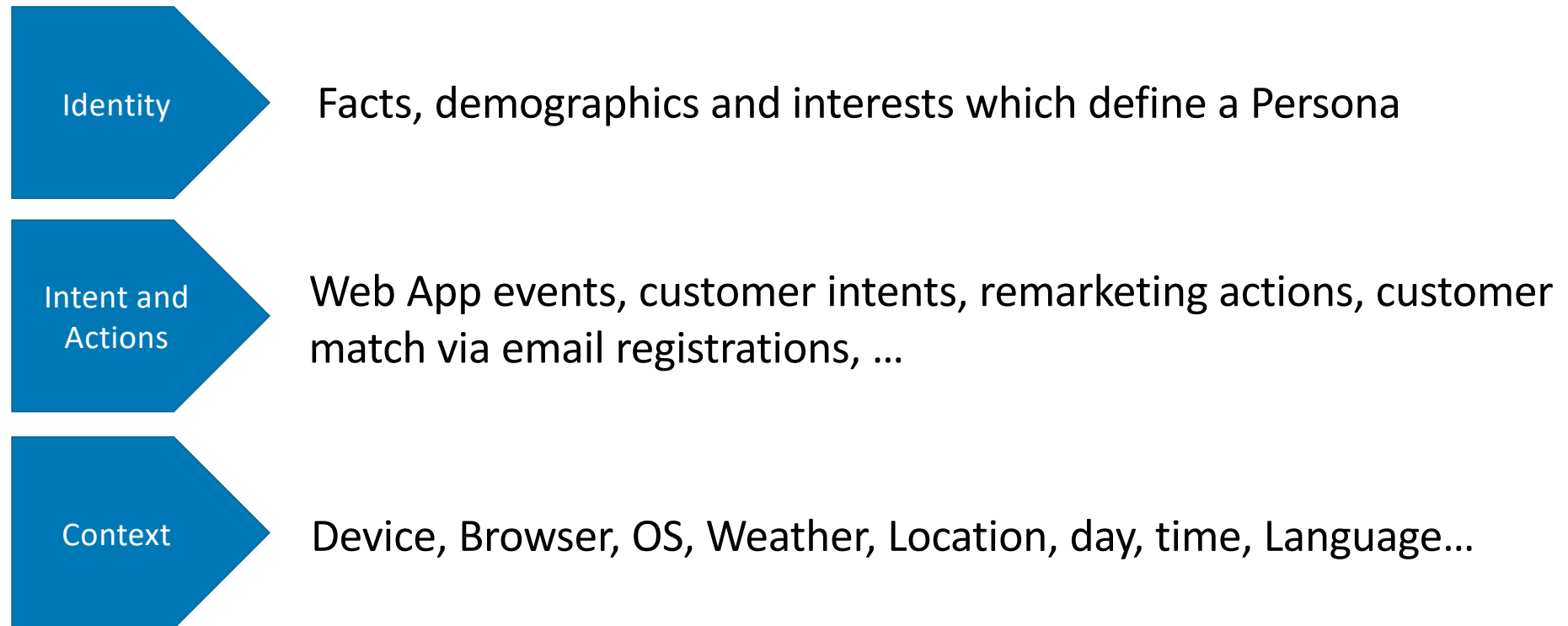

Video:
https://youtu.be/ws6Na1pc1uA

Digital Identities. Merkle Blog:
https://www.merkleinc.com/blog/anatomy-identity

How to build Segments?

Identity — Facts, demographics and interests which define a Persona

Intent and Actions — Web App events, customer intents, remarketing actions, customer match via email registrations, …

Context — Device, Browser, OS, Weather, Location, day, time, Language…

Based on Google definition of signals . Connected Customer workshop (2018)

Identity Management

The marketing method of connecting a customer's data across <u>every channel</u> — and activating that information into more effective engagements at every turn

To Support Strategic Initiatives such as:
1. Optimizing your Customer Journeys in a fragmented world
2. Improve measurement
3. Increase DATA Governance and Responsibility
4. Better customer Acquisition
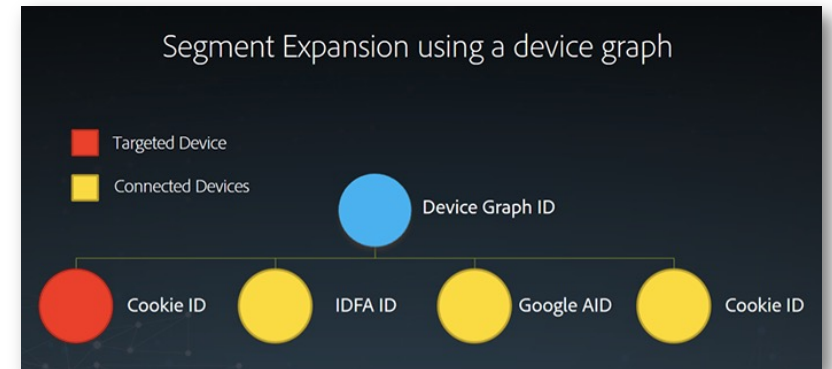5. Better customer Development

Identity Management

- Identity Management enables **People Based Marketing**

- The goal is to identify **Personas not Browsers or Devices:**

    +5 Connected Devices per Household in the US
    +3 Connected Devices per individual in the US

Segment Expansion using a device graph

| 87% of consumers use a second screen while watching TV | 40% of people who start an activity in one device finish on another | 30% of purchases are cross-device transactions |

Identity Management – from Adobe
https://www.linkedin.com/pulse/identity-management-digital-marketers-swiss-army-knife-ben-beard/?articleId=6379143200975704065

Why Identities?

People-based Marketing

New channels, devices, apps and voice technology create more opportunities than ever before for Brands to engage with customers but it is more difficult to be relevant and consistent

Contents:

Cookies, Device IDs and other Identifiers

Cookies	Device IDs	Strong IDs
Small file stored in the browser accessible by the website. It stores user information, session information and other context information about the browser. It is not persistent, can be deleted by the user.	identifies every individual smartphone or tablet in the world. It is stored on the mobile device and can be retrieved by any app that is downloaded and installed. Apps typically retrieve the ID for identification when talking to servers.	- Email addresses - Unique login IDs - Customer ID (from CRM) - Phone numbers - Facebook, Google, Apple logins - etc…

Current challenge

All IDs help to create the Identity Graph to identify People

Video: What is a cookie: https://www.youtube.com/watch?v=I01XMRo2ESg
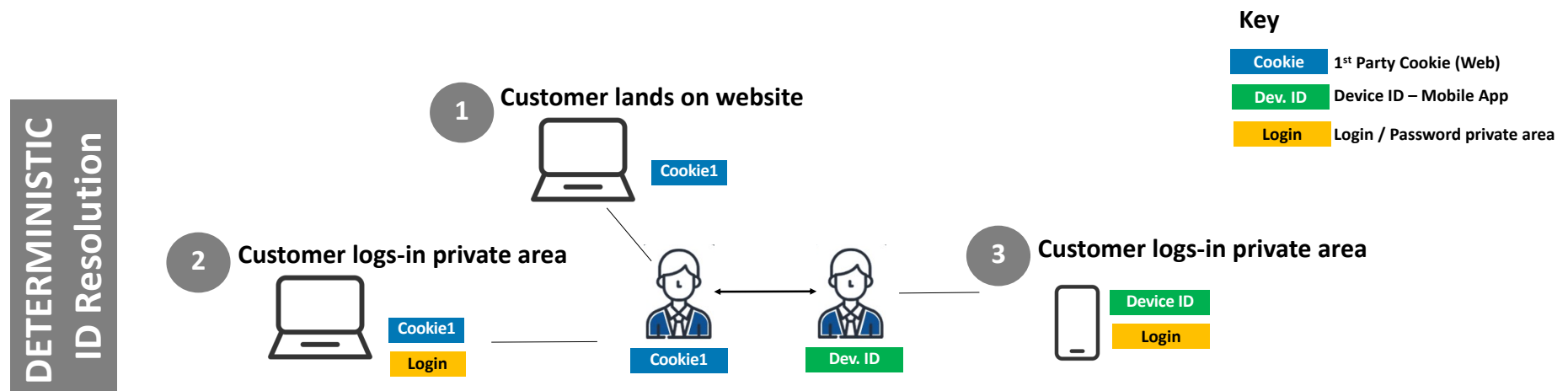
Reading What is a Device ID: **https://www.adjust.com/glossary/device-id/**

Device IDs:
Apple – IOS: **IDFA** – "Identity for Advertisers"
Google – Android: **GPS ADID** "Google Play Services ID for Android"

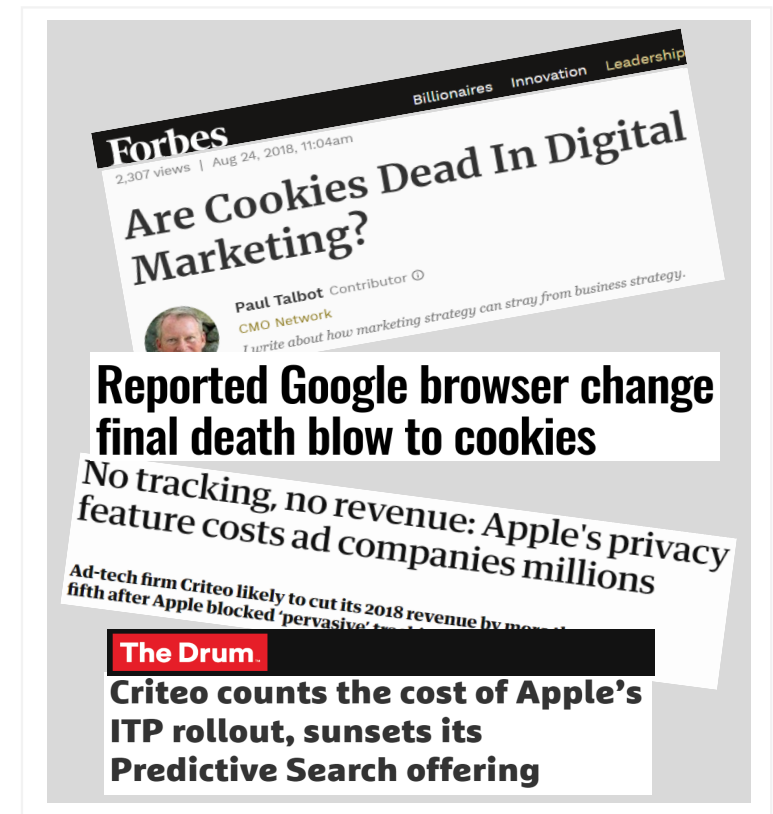# ID Deterministic resolution based on COOKIES and DEVICE IDs

Key

Cookie	1st Party Cookie (Web)
Dev. ID	Device ID – Mobile App
Login	Login / Password private area

DETERMINISTIC ID Resolution

1 Customer lands on website

Cookie1

2 Customer logs-in private area

Cookie1
Login

Cookie1

Dev. ID

3 Customer logs-in private area

Device ID
Login

- Deterministic resolution is the most accurate ID method based usually on strong IDs (logins, emails, …)
- It also relies on on cookies which identify Browsers and on Device IDs which Identify devices (but not people)
- Since cookies are not persistent Brands need to renovate deterministic IDs trying to log-in the user recurrently

Activity: why Facebook and Google are very efficient advertising ecosystems?

Cookie persistency under pressure

- Safari and Firefox ITP (Intelligent Tracking Prevention) already in place
- Chrome policy coming soon (2023)
- Third party cookies more affected: Digital Marketing
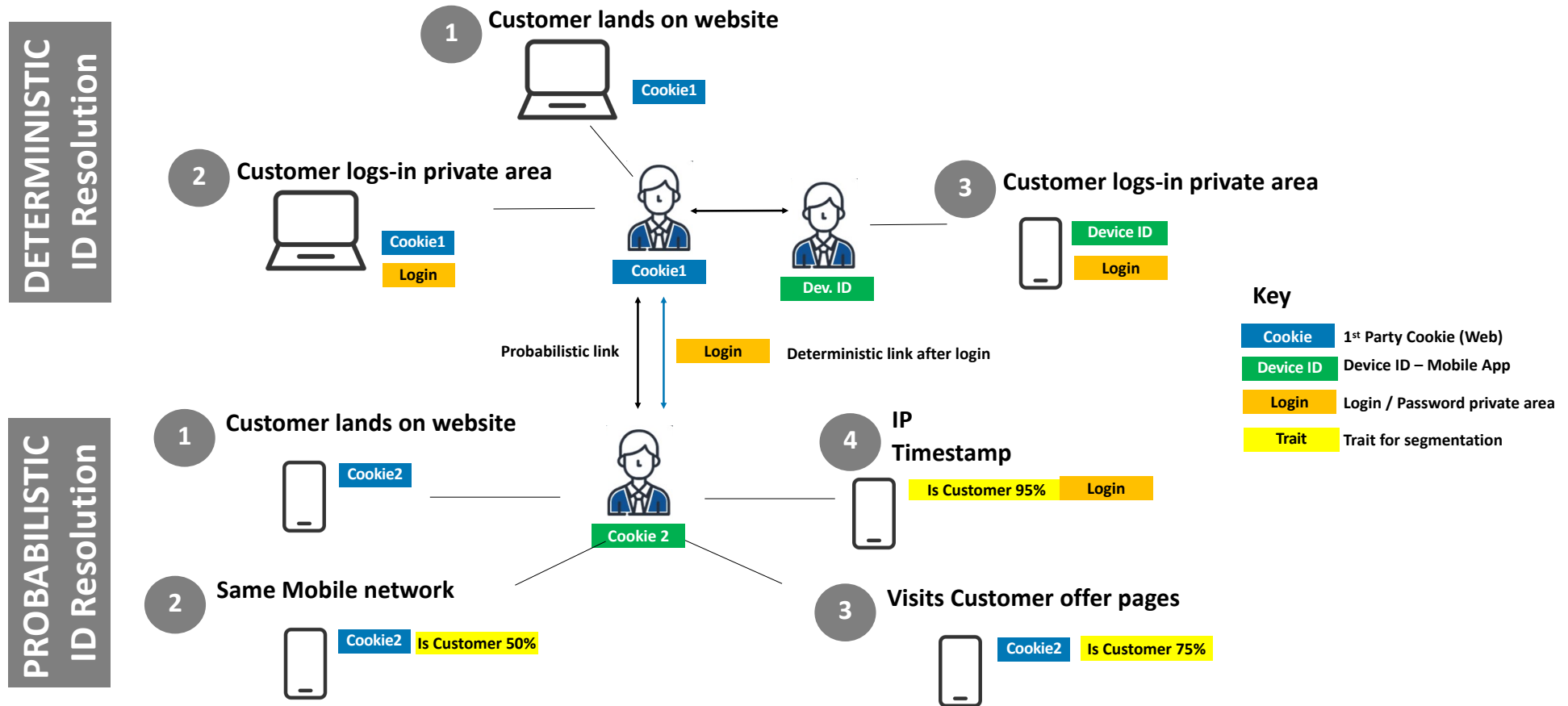- First party cookies still allow with limitations

Activity: discuss on the cookie issue and their consequences

Contents:

ID Probabilistic resolution based on COOKIES and DEVICE IDs

DETERMINISTIC ID Resolution

1 Customer lands on website
Cookie1

2 Customer logs-in private area
Cookie1
Login

Cookie1

Dev. ID

3 Customer logs-in private area
Device ID
Login

Probabilistic link

Login   Deterministic link after login

PROBABILISTIC ID Resolution

1 Customer lands on website
Cookie2

Cookie 2

4 IP Timestamp
Is Customer 95%   Login

2 Same Mobile network
Cookie2   Is Customer 50%

3 Visits Customer offer pages
Cookie2   Is Customer 75%

Key

Cookie	1st Party Cookie (Web)
Device ID	Device ID – Mobile App
Login	Login / Password private area
Trait	Trait for segmentation

Deterministic and Probabilistic IDs: https://www.admonsters.com/ad-ops-decoder-what-are-deterministic-and-probabilistic-ids/

Contents:

Master in Digital Business and Innovation

Technologies and Tips for ID Management

- Adobe Experience Platform - https://www.adobe.com/experience-platform.html
- Neustar - https://www.home.neustar/resources/product-literature/better-customer-identity-management
- Acxiom Identity Builder - https://www.acxiom.com/what-we-do/identity-solutions/
- Tapad - https://www.tapad.com/
- Signal - https://www.signal.co/customer-identity-solution/

Tips:
- DATA silos are the great challenge to develop a robust ID Management projects
- Privacy by Design is required to respect user privacy rights
- Technologies are still unmatured and there is a lack of organizational capabilities in Brands to fully support the ID Management and DATA activation

Key Takeaways from Session 12

1. Customers are across new channels, devices, apps and voice technology creating more opportunities for Brands to become more relevant

2. Identity Management is the marketing method of connecting a customer's data across every channel to activate that data more efficiently

3. Identity Management enables People Based Marketing which goal is to identify Personas not Browsers or Devices

4. Deterministic resolution is an accurate identification method based on strong IDs

5. Probabilistic resolution tries to guess with high accuracy the ID of a user

6. Cookie persistency issues are forced Brands to develop their own ID methods

7. New technologies are becoming popular to support ID Management and Resolution

8. Privacy, DATA silos and lack of capabilities are the key challenges for Brands to exploit these technologies