

User Experience, Web Design & CRO

Session 13

Personalization Technologies



Contents:

1. Basic Personalization Tools for Web and App
2. Introduction to DMPs (Data Management Platforms): signals, traits, audiences and destinations
3. Demo case

Session 13

Personalization Technologies and Introduction to DMPs
(Data Management Platforms)

Short readings

Session 13 – Personalization Technologies

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

PDFs and other materials are uploaded in the Campus

1. The path to personalization: benefits and obstacles in organizations
<https://www.forbes.com/sites/insights-treasuredata/2019/05/01/the-path-to-personalization/?sh=3574c8687a76>
2. What is a customer data platform? How is it different from a DMP or CRM?: eConsultancy.
<https://econsultancy.com/what-is-a-customer-data-platform-how-is-it-different-from-a-dmp-or-crm>
3. A technology blueprint for personalization at scale. McKinsey. 2019. (pdf)

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Personalization Technologies

DATA

- Avoid Silos
- Identity resolution
- Get 360 view of customer
- Privacy management

DECISIONING

- From single Channel to Omnichannel
- Predictive
- Real time
- Win-win with business impact

DESIGN

- Content is needed at scale
- Create modular Design Systems
- Dynamically assembled

DISTRIBUTION

- Real time orchestration
- CMS
- eMail platforms
- Call-centre systems
- Retail systems ...

CROSS FUNCTIONAL TEAMS AND TECHNOLOGY

Source: A technology blueprint for personalization at scale. McKinsey. 2019. (pdf)

Personalization Technologies

The balance of power has shifted to customers and
Personalization is a critical differentiator

What

DATA based technologies to deliver personalized experiences to customers

Ingredients

- a) DATA
- b) Business Logic Engine (AI powered)
- c) Content delivery infrastructure
- d) Content (web pages, App experiences, Voice, Digital Advertising, TV, ...)

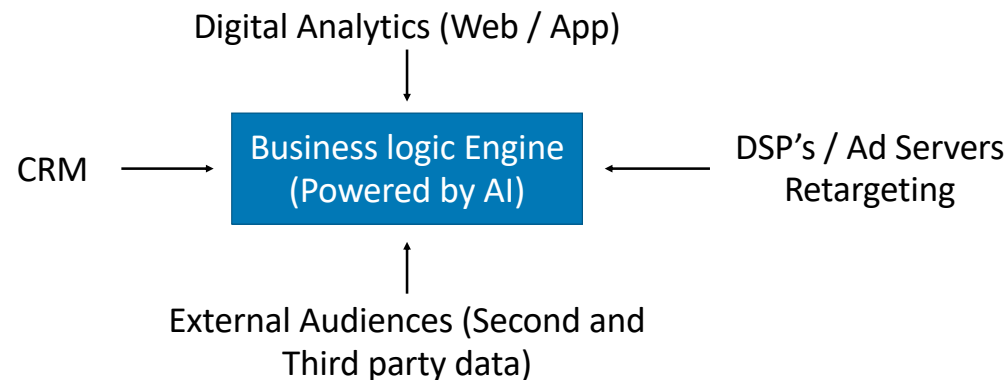
Key Success factors

- a) DATA strategy and planning with business focus
- b) Requires strong TECHNOLOGY support
- c) Requires strong CONTENT production capabilities

Deep Dive: <https://www.forbes.com/sites/insights-treasuredata/2019/05/01/the-path-to-personalization/#294fe85f7a76>

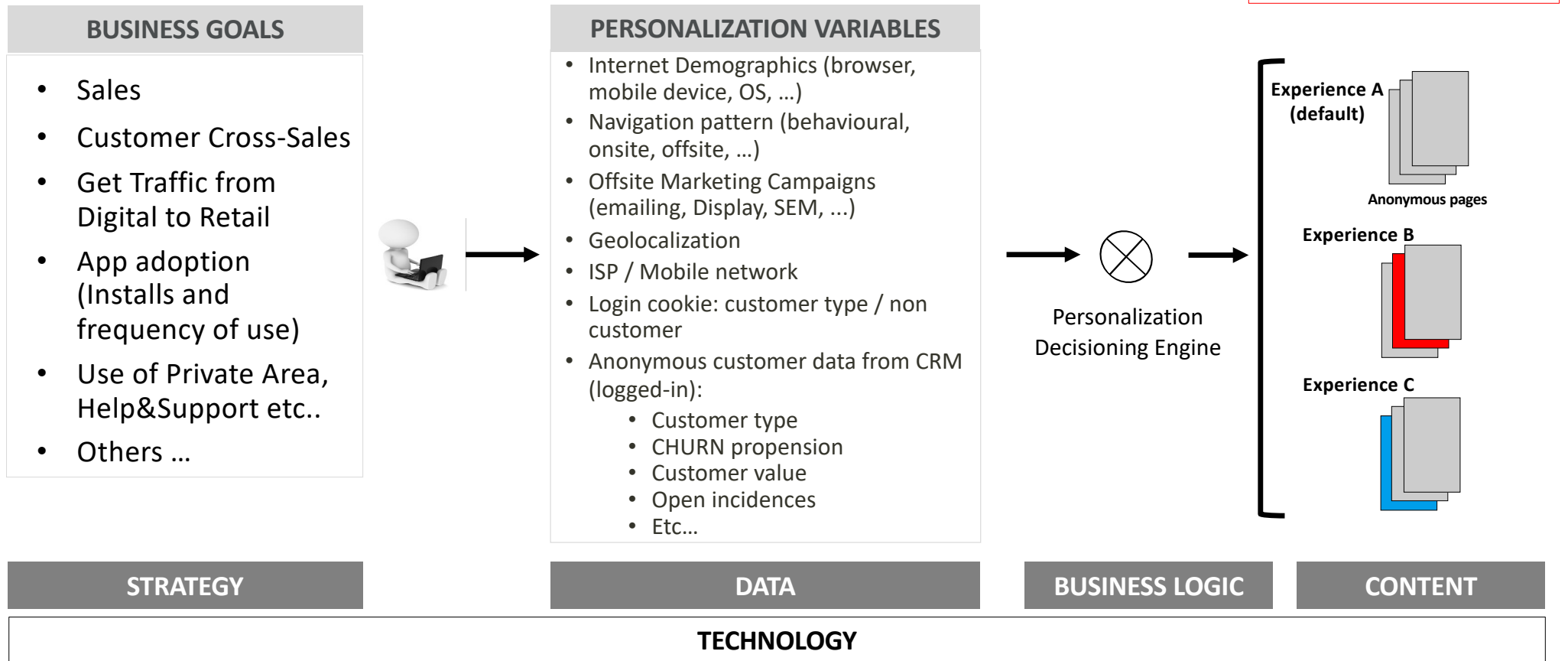
Personalization technologies

- Requires business logic (DECISIONING ENGINE) fed with a variety of DATA sources:
 - Web / App Analytics (behavioural targeting)
 - Connections with Paid Media DATA sources (DSPs and Ad Servers feeds)
 - CRM and other internal systems (lead management systems, email marketing, etc...)
 - Other 2nd and 3rd party audiences (2nd and 3rd Party Cookies)
- The Business logic (Decisioning Engine) is AI powered to deep dive onto DATA patterns to deliver individual experiences



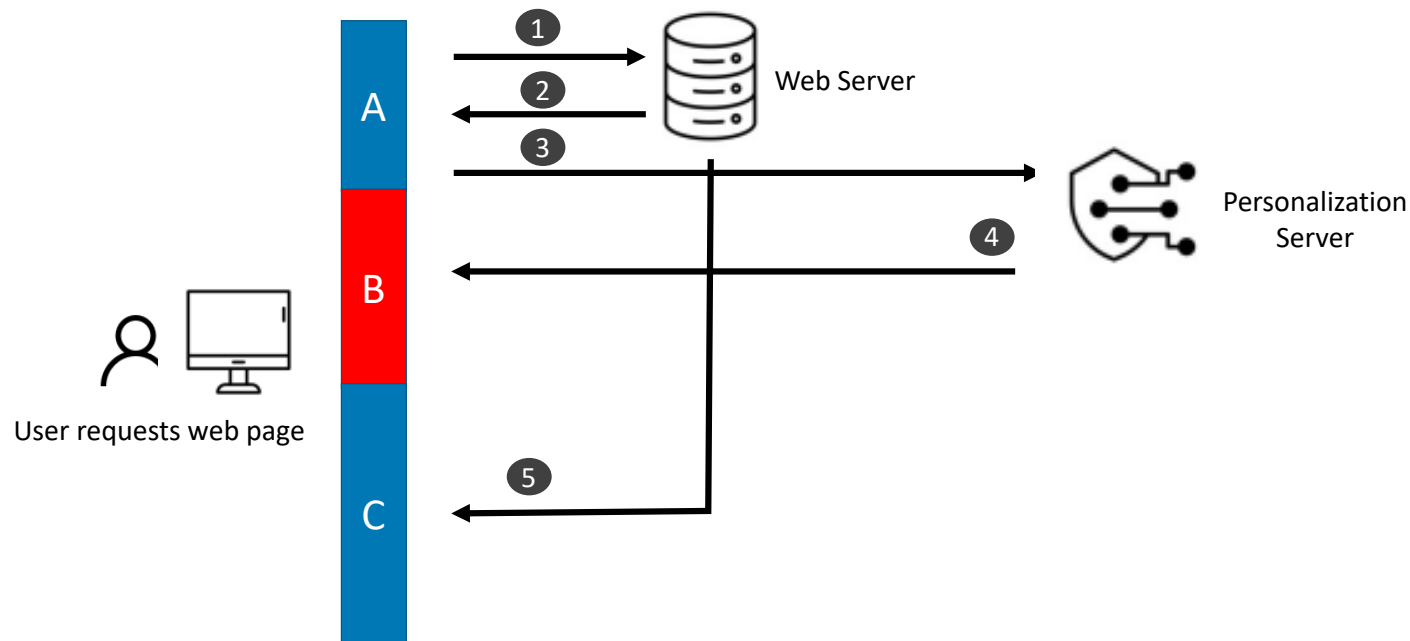
Personalization tools: how they work

Example of Personalization Goals and Personalization variables



How content is personalized (web)

Web personalization: content is injected during content load



1. User requests web page
2. Web page starts loading (A)
3. Web page requests personalization based on user IDs and context
4. Personalized content is injected into page (B)
5. Rest of web page loads (C)

Discuss: How personalization can be achieved in hybrid and native apps?

Personalization tools

- Google Optimize (to be discontinued on 30/09/23) - <https://optimize.google.com/optimize/home/#/accounts>
- AB Tasty - <https://www.abtasty.com/>
- Monetate (Kibo) - <http://www.monetate.com/>
- Adobe Target - <https://www.adobe.com/es/marketing-cloud/target.html>
- Salesforce - <https://www.salesforce.com/eu/products/marketing-cloud/platform/>

Salesforce Marketing Cloud Personalization video : <https://www.youtube.com/watch?v=s5n4CJbGfi4&feature=youtu.be>

- Oracle Maxymiser - <https://www.oracle.com/cx/marketing/personalization-testing/>

More Personalization tools: <https://blog.useproof.com/web-personalization-tools/>

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CRM and DMPs

CRM

Customer transactional system to create a persistent profile of existing customers based on "profile-card type" of data

DMP

Cookie based system to connect advertisement type platforms to allow remarketing focused on anonymous non-persistent profiles (i.e.. 90 days cookies)



- Allow to ingest anonymized customer data from CRM
- Supports OWNED MEDIA and PAID MEDIA personalization
- Manage audience creation, campaign priorities and frequency capping



- Cookie based. No persistent
- No strong ID management
- No strong audience management

Signals, Traits, Segments and Destinations

Signals

Smallest Data Unit
which represents a
Data variable

Age: 1-20
Browser: Chrome
Location: 28050
Customer login: False

Traits

Combinations of one
or more signals to
create a characteristic

Is customer:
(Customer login=True)

Segments

Users sharing common
attributes and qualify
for related traits

Is Customer and live in Madrid:
(login=True) and (Location=34-
28)

Destinations

Any third-party
system (ad server,
DSP, ad network, etc.)
that you want to
share data with to
create a personalized
experience

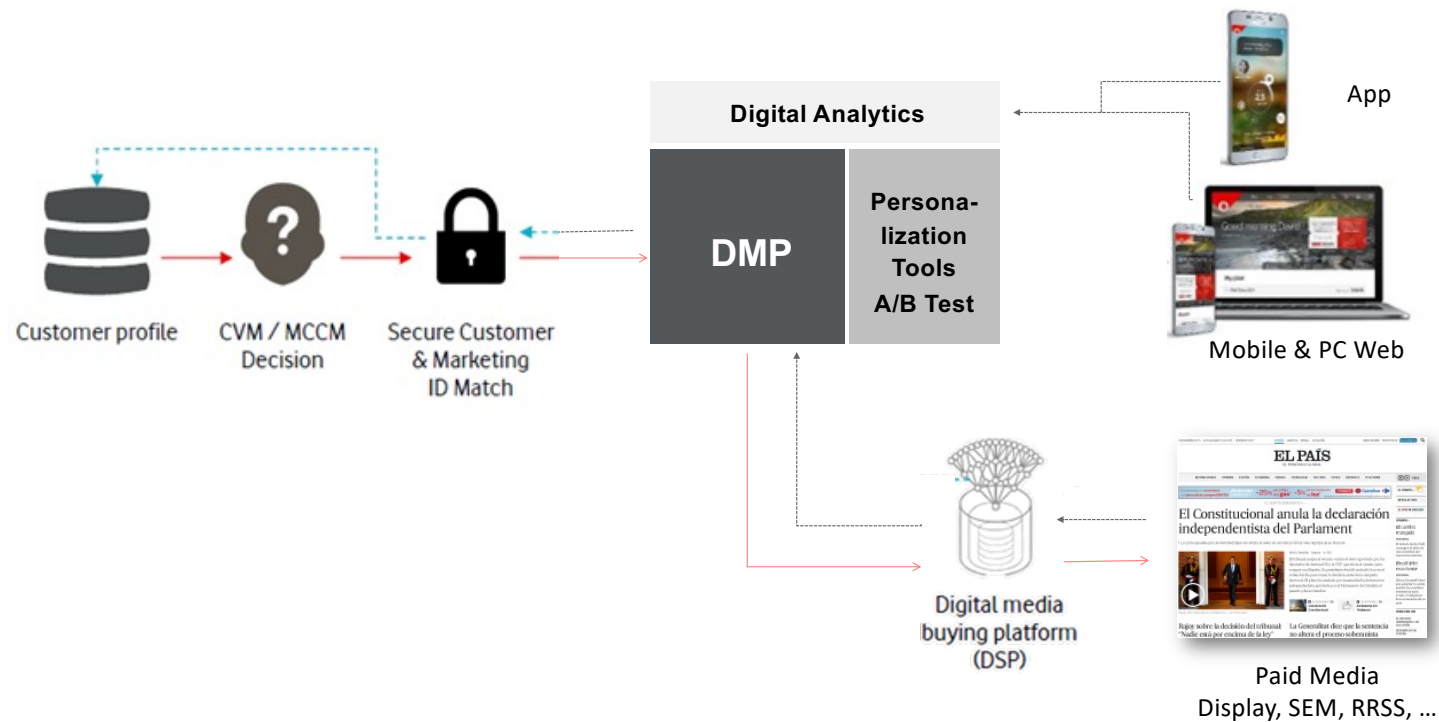
Based on Adobe DMP (Adobe Audience Manager)

<https://docs.adobe.com/content/help/en/audience-manager/user-guide/reference/signal-trait-segment.html>

<https://docs.adobe.com/content/help/en/audience-manager/user-guide/features/destinations/destinations.html>

DMP: Data Management Platform

For OWNED and PAID media



CRM, DMPs and CDPs

CRM

Customer transactional system to create a persistent profile of existing customers based on "profile-card type" of data

DMP

Cookie based system to connect advertisement type platforms to allow remarketing focused on anonymous non-persistent profiles (i.e.. 90 days cookies)

CDP

Persistent, unified customer database with real-time Marketing Profiles that is accessible to other systems. Able to ingest any type of data (structured and unstructured), from any kind of source (transactional, behavioural, product data, etc...)

To be
covered in
Session 14

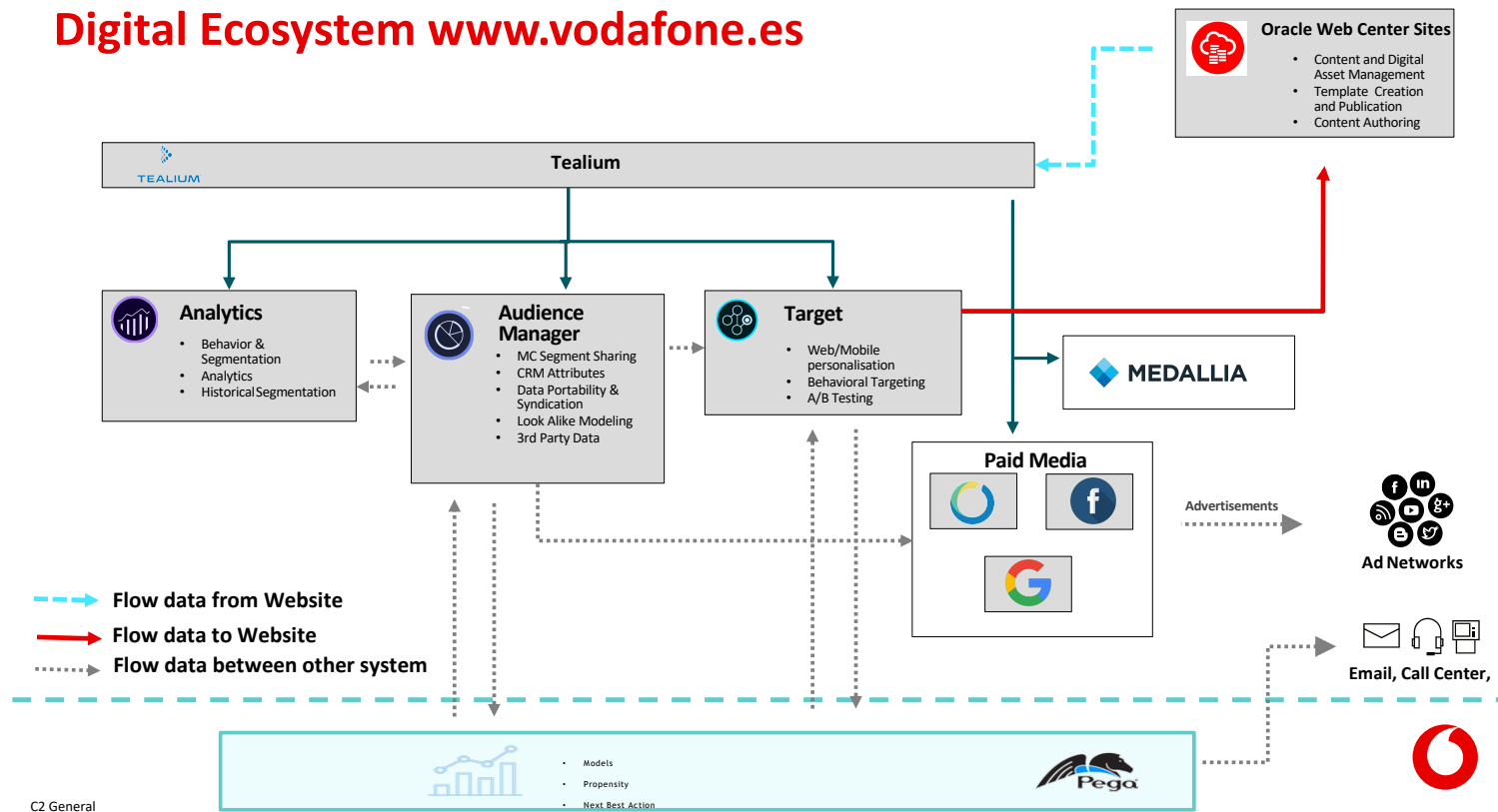
Deep dive: <https://econsultancy.com/what-is-a-customer-data-platform-how-is-it-different-from-a-dmp-or-crm/>

Contents:

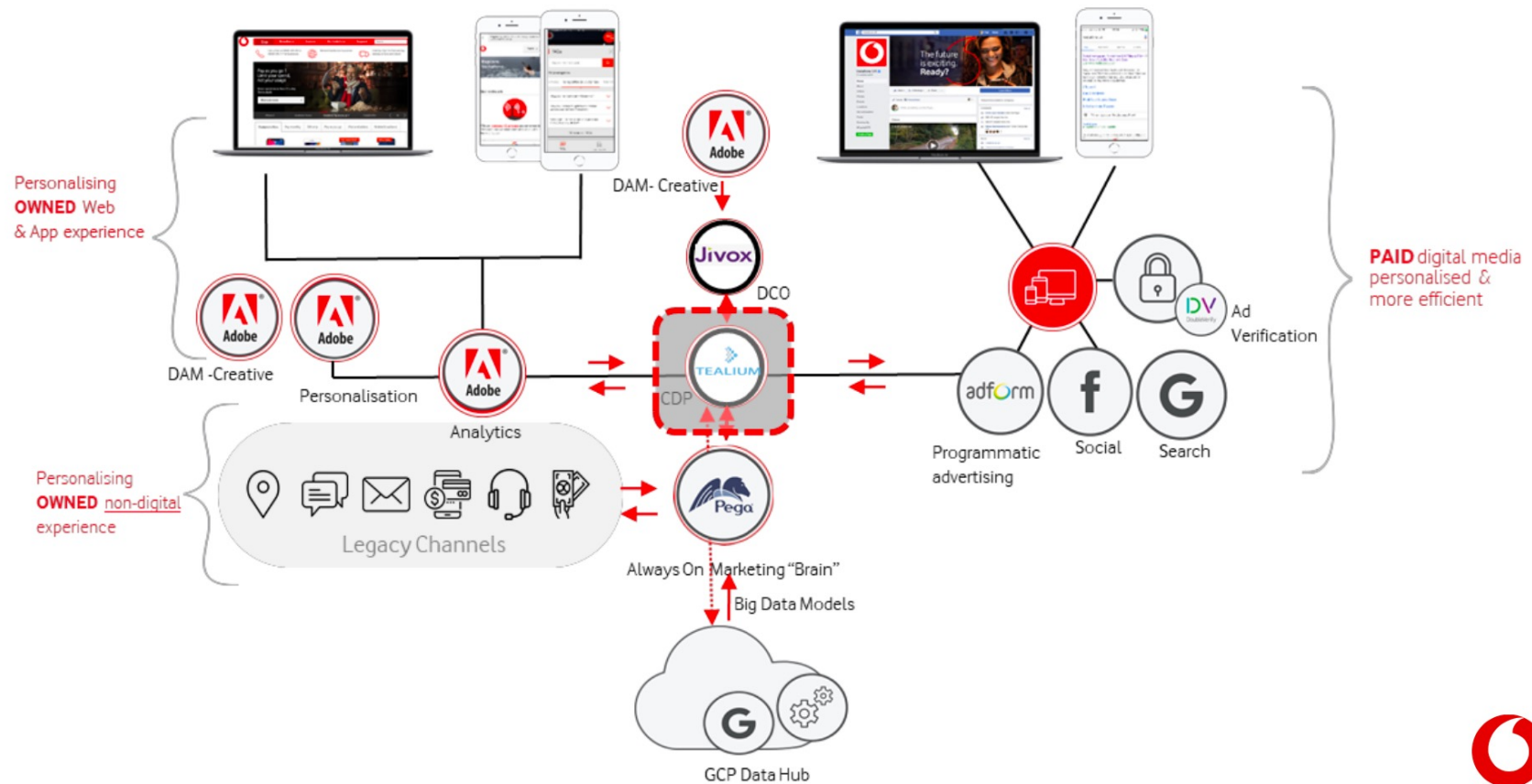
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Ecosystem example - DMP

Digital Ecosystem www.vodafone.es

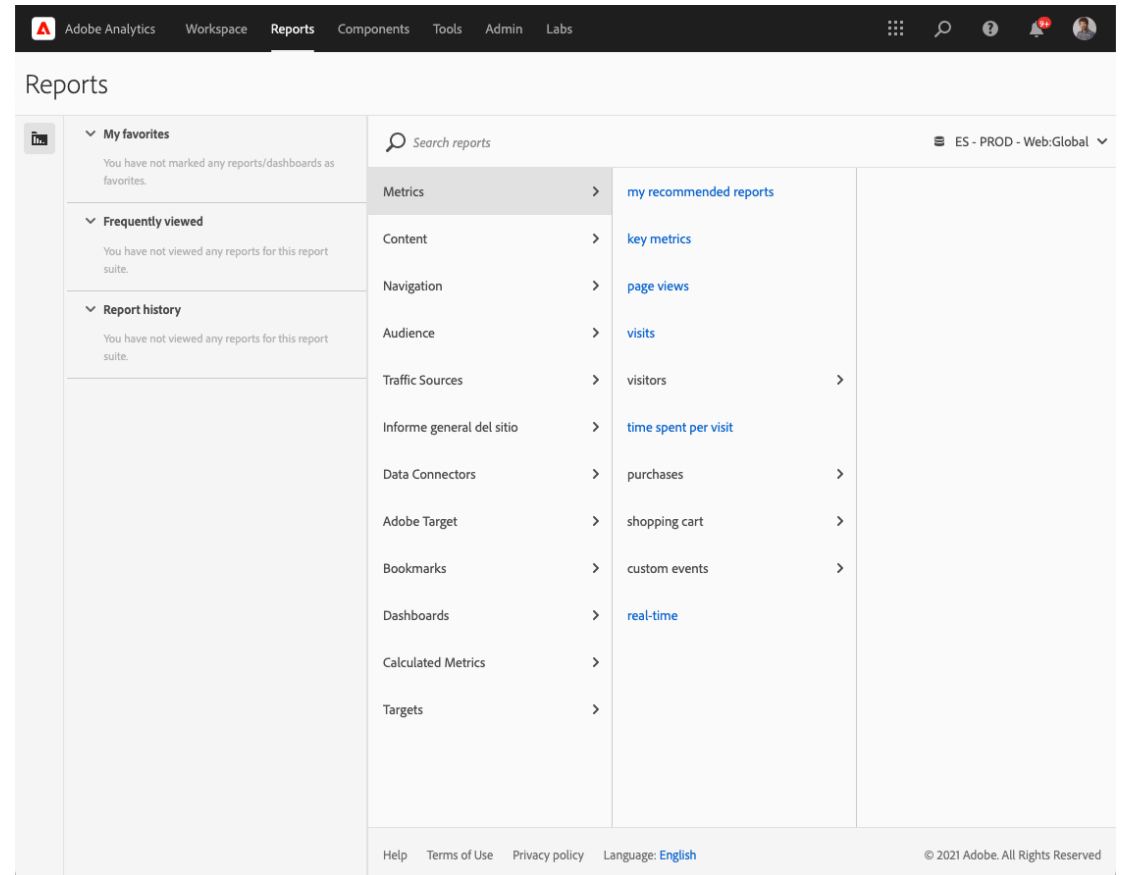


Ecosystem example - CDP



Adobe Analytics → Analyze

- Behavior & segmentation
- Analytics
- Historical segmentation



Adobe Target → Activation

- Web/mobile personalization
- Behavioral Targeting
- A/B testing

Adobe Target Actividades Audiencias Ofertas Recomendaciones Administración

Manuel Blanco 11 mis espacios de trabajo (11)

Buscar nombre de actividad

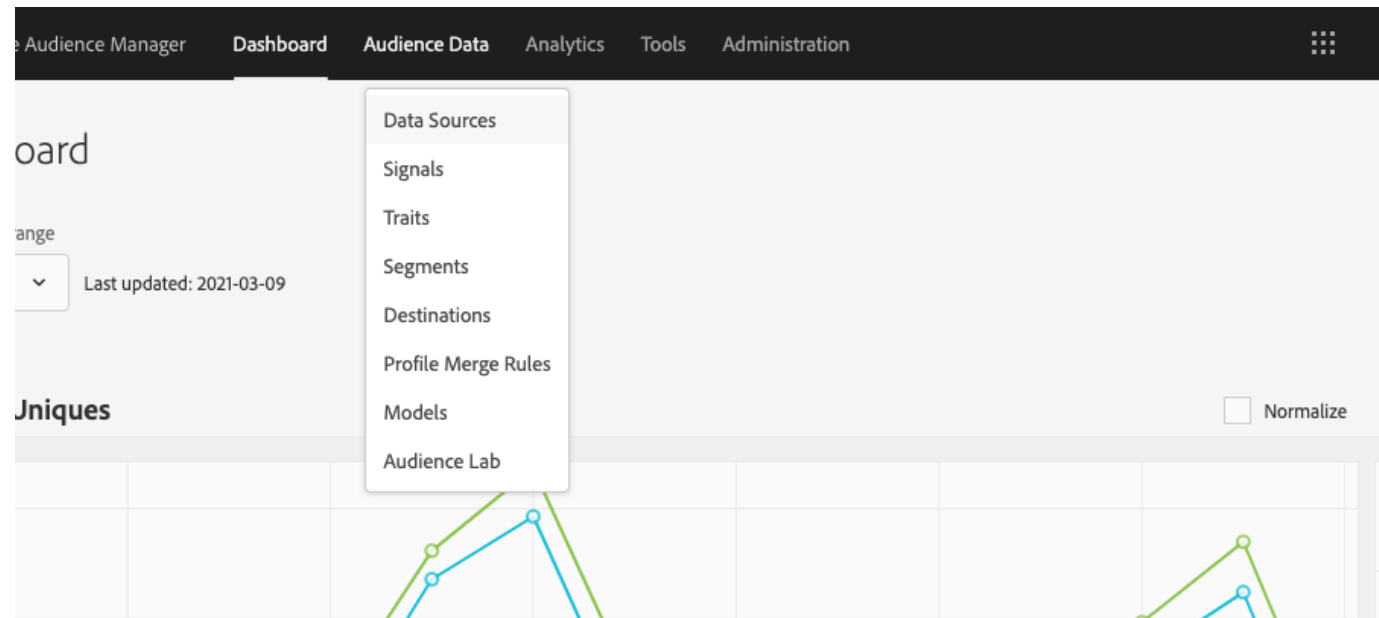
Se encontraron más de 100 actividades

| Tipo | Nombre | Estado | Origen | Espacio de trabajo | Propiedad | Últ. Act. |
|------|--|--------|--------------|----------------------|-----------|------------------------------------|
| A/B | FY2021_T105 - [PROD] - Test Cambio Selecto... | Activo | Adobe Target | Bit APPROVER | Bit | 11/03/2021 12:30 por Mar |
| A/B | FY2021_T101 [PROD]- Cambio acelerador ho... https://www.vodafone.es/c/particular... | Activo | Adobe Target | Cross - Par APPROVER | crossPar | 11/03/2021 12:30 por Javier Martin |
| XT | DMP1819 - CU20:autonomos:Ciberseguridad https://www.vodafone.es/c/empresas... | Activo | Adobe Target | Cross - Aut APPROVER | crossAut | 11/03/2021 09:04 por Esther Varas |

Prueba A/B
Personalización automatizada
Direccionamiento de la experiencia
Prueba multivariada
Recomendaciones

Adobe Audience Manager → Audiences (in/out)

- MC Segment Sharing
- CRM Attributes
- Data Portability
- Look Alike Modelling
- 3rd Party Data



Customer Data Platform (CDP) → Audiences (in/out) + Advance segmentation

- Identity resolution
- Improved data protection & privacy
- Segment Sharing
- CRM Attributes
- Data Portability

The screenshot shows the Tealium Customer Data Hub interface. The left sidebar contains navigation options for CLIENT-SIDE (iQ Tag Management, Dashboard, Data Layer, Load Rules, Tags, Extensions) and SERVER-SIDE (Data Supply Chain, Sources, EventStream, AudienceStream, DataAccess). The main content area is titled 'iQ Tag Management >> Data Layer' and has tabs for VARIABLES, DATA LAYER SPECIFICATIONS, and VERIFY. The VARIABLES tab is active, displaying a table of variables.

| Name | Type | Notes | Labels | Mappings |
|---|-----------------------|---|------------------------|----------|
| _ga _ga | Cookie Value | Google Analytics client id | | |
| Accessories Fan | Visitor Attribute | Assigned when anyone navigates to the accessor... | AudienceStream (com... | |
| Active browser type | Visitor Attribute | The browser actively being used by the visitor | AudienceStream (com... | |
| Active browser version | Visitor Attribute | The browser version actively being used by the vis... | AudienceStream (com... | |
| Active device | Visitor Attribute | The device actively being used by the visitor | AudienceStream (com... | |
| Active Device type (favorite) | Visitor Attribute | Captures the favorite metric for Tally: Active Devic... | AudienceStream (com... | |
| Active operating system | Visitor Attribute | The operating system actively being used by the vi... | AudienceStream (com... | |
| Active platform | Visitor Attribute | The platform actively being used by the visitor | AudienceStream (com... | |
| Ad ID Impressions (favorite) | Visitor Attribute | Captures the favorite metric for Tally: Ad ID Impres... | AudienceStream (com... | |
| Add to Cart | Visitor Attribute | | AudienceStream (com... | |
| Add to Cart - Lifetime Number | Visitor Attribute | Lifetime Number of Add to Cart events | AudienceStream (com... | |
| Added to Wishlist | Visitor Attribute | | AudienceStream (com... | |
| Adobe ID | Visitor Attribute | | AudienceStream (com... | |
| adwords_pagetype adwords_pagetype | Universal Data Object | | | |
| AOV - 30 Day | Visitor Attribute | 30 Day Rolling Average of Order Totals | AudienceStream (com... | |
| AOV - 60 Day | Visitor Attribute | 60 Day Rolling Average of Order Totals | AudienceStream (com... | |

Key Takeaways from Session 13

1. Personalization requires x4 elements: DATA, a business logic DECISION ENGINE, a content INFRASTRUCTURE to deliver the personalized experiences and the CONTENT itself
2. Personalization requires clear Business GOALS and Personalization variables based on DATA
3. Technically the personalized content is injected during the execution of the content loaded, but it differs from HTML environment to native App environment
4. There are many technologies to deliver personalized experiences, there is an increasing demand from Brands. The market of technology and services is growing quickly
5. DMPs (Data Management Platforms) are Personalization technologies which allow personalization via retargeting strategies in OWNED media and PAID media based on cookies
6. DMPs lack the necessary capacity to cover other offline channels (multichannel personalization is not covered with DMPs)
7. CDPs (Customer Data Platforms) manage a persistent real-time Marketing Profiles that are accessible to other systems allowing easy real-time omnichannel personalization