



# Personalization Best Practices for Oracle Commerce

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Hardware and Software  
Engineered to Work Together

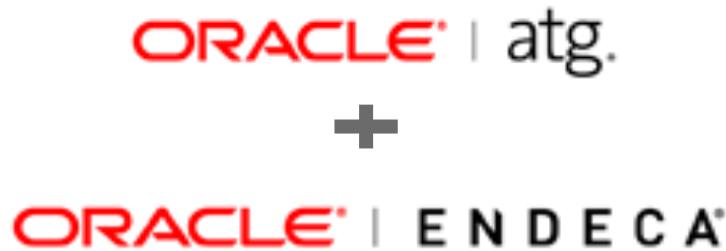


Engineered for Innovation

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Market-Leading Multi-Channel  
Commerce Platform



Market-Leading Guided Search  
& Customer Experience Management



# Agenda

- What is “personalization”?
- ATG / Endeca capabilities
- Personalization use cases
- Demonstration / Vision
- Best Practices Summary
- Personalization Roadmap



# Personalization.

A business strategy that seeks to make brand to consumer relations **more tailored to the individual** with the goal of meeting the customer's needs more **quickly and effectively** – consequently increasing customer **satisfaction and loyalty**. For digital customer experiences, this means delivering the right content to the **right person at the right time across all customer touch points**.

# Why personalize the commerce experience?

**94%**

*of customers will  
pay more for a  
better experience.\**



**88%**

*of employees believe  
they can impact  
experience quality \**

**Customer Experience**  
*Focus on the customer; Enable the business owners*

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**only 1%**

**of consumers feel that  
their expectations for  
a good customer experience  
are always met**

# What makes personalization hard?



I am looking for  
Red Wine

Query

Unfortunately, in the Digital World:

- You are not actually face-to-face
- You can't read body language

...

Great, we have  
wide selection.  
here are some  
our best sellers

Response

But there are Advantages:

- Access to data & content
- You can leverage science & technology
- Still a role for instinct & business knowledge
- You can continually learn and adapt

...

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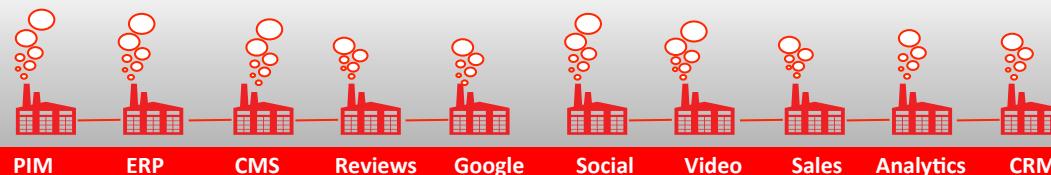
# **Personalization**

**Where do you start?**

# Product Content and Data



# Customer Content and Data



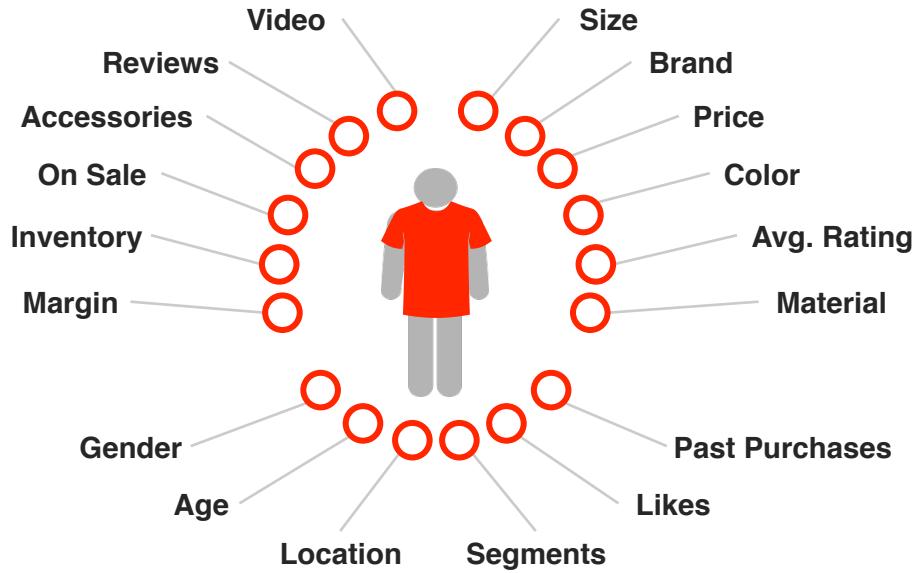
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# A Complete Picture for Each Interaction

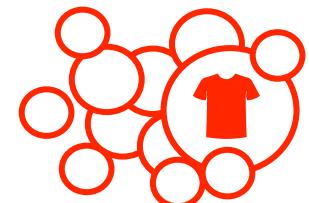
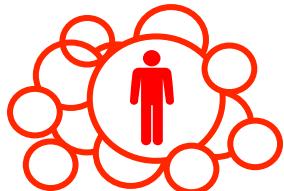
Understand the Customer and What they Want

Additional Content & Data

Core Product Attributes



Rich Customer  
Data



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# Personalization

## Range of Approaches / Techniques

- Anonymous (Rule, Context-based, Search-based)
- Customer Profiles / Market Segments
- Scenario-based
- Content-targeting

# **Personalization**

## **Anonymous use case**



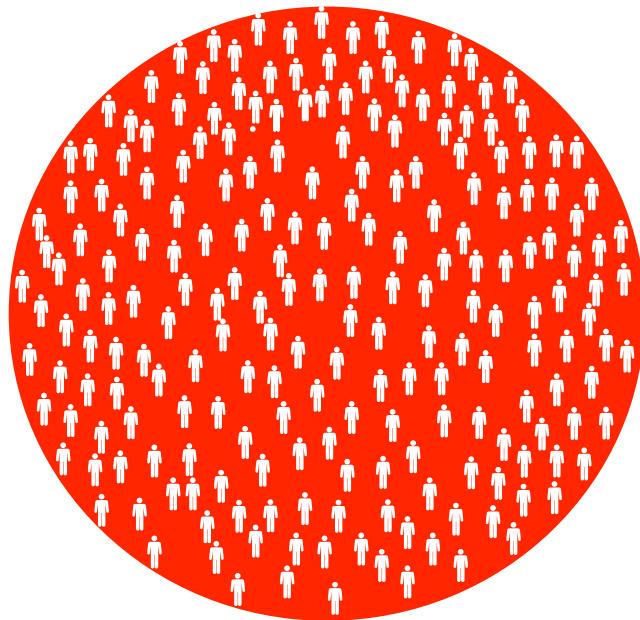
**How can you personalize  
experiences when you don't know  
anything about the customer?**

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### Search / Navigation

Target to all based  
on explicit  
context and intent



187000+  
PRODUCTS

cell



USA Home &gt; Search Results

## Showing:

- Product Results
- Site Content

## Your Selections

Product Category: Cell Biology

- Product Category
  - Cell Biology (10760)
  - Bioactive Small Molecules (5112)
  - BRDU Cell Proliferation Assay Reagents (13)
  - Cell Analysis (46)
  - Cell Signaling and Neuroscience (7811)
  - CompoZr Cell Lines (23)
  - PKH and CellVue Fluorescent Cell Linkers (13)
  - Protein Arrays (383)
  - Stem Cell Biology (1379)

 Special Grade

- AAS (1)
- Absolute (1)
- ACS reagent (26)
- Analytical (359)
- Anhydrous (11)
- BCR (4)
- BioChemika (2)
- BioReagent (136)

**Advanced Search:**  
Type-ahead prompt for valid next step, taking out the guess work

**(±) Clopidogrel hydrogens**

1 Product Result | Match Criteria: Keyword

[C0614 200% \(HPLC\) powder \(Sigma\)](#)

**Guided Navigation**  
Refinement on most valid combinations of attributes from any point

AGC 1-acylglycerol-3-phosphate O-acyltransferase 1  
(lysophosphatidic acid acyltransferase, alpha)

[Summary](#) | [Interactors](#) | [Pathways](#) | [Literature](#)**INGENUITY**  
SYSTEMS

**Multi-select**  
Preselect most valid attributes up front, gets customer to goals more swiftly.

Products: [3'UTR GoClone](#)

Animal Models  
Zinc Finger Nucleases  
shRNA

Antibodies  
esiRNA  
siRNA

[View All 38964 Related Genes](#)

**(-)-1-(2,5-Dimethoxyphenyl)-2-aminopropane hydrochloride**

1 Product Result | Match Criteria: Keyword

[D114 \(Aldrich\)](#)[Properties](#) [Properties](#) [MSDS](#) | [pricing](#)

**(-)-1-(2,5-Dimethoxyphenyl)-2-aminopropane hydrochloride**

1 Product Result | Match Criteria: Keyword

[D114 \(Aldrich\)](#)[MSDS](#) | [pricing](#)

# **Personalization**

**Leveraging segments & profiles**

# Profiles / Segments

Driving more relevant interactions by targeting content (promotions, merchandise, etc.) based on customer attributes gathered from past and present interactions:

- Gender / Age / Geography
- Demographics
- Psychographics
- Purchase patterns
- Channel
- Customer LTV





Search /  
Navigation



**Segments**  
Get more targeted with  
what you know



SEARCH



SEPHORA

3-DAY SHIPPING  
FREE over \$50 

MAKUP SKINCARE FRAGRANCE BATH / BODY HAIR TOOLS / ACCESSORIES MEN GIFTS SOLUTIONS IT LISTS TRENDS ADVICE

my account > personalized products

## MY ACCOUNT

- [My Information](#)
- [Orders](#)
- [Purchase History](#)
- [Payment Methods](#)
- [Subscriptions](#)
- [Beauty Insider](#)
- [Personalized Products](#)
- [Shopping List](#)
- [Help](#)

personalized produ

beautyinsider profile

BEAUTY INSIDER  
NUMBER: 02820213

BIRTH DATE: August 12

HAIR CONCERN:

SKINCARE CONCERN:

change profile

If you see an error in your profile, [click here](#) to have it corrected.

Your personal  
style:  
straight fr

FOR YOUR G  
EYES ONLY

## SKINCARE Do you dream of flawless skin?

## 1. WHAT IS YOUR SKIN TYPE?

choose your skin type

## 2. WHAT ARE YOUR MAJOR SKIN CONCERN(S)? (check all that apply)

- sun damage  uneven skin tone  aging  sensitivity  
 acne  dullness  other

## MAKEUP What are your true colors?

## 1. WHAT IS YOUR EYE COLOR?

choose your eye color

## 2. WHAT IS YOUR HAIR COLOR?

choose your hair color

## 3. WHICH COLOR IS CLOSEST TO YOUR SKIN TONE?



- fair  light  medium  olive  deep  dark

breath

## HAIR &amp; FRAGRANCE What are those final touches?

## 1. WHAT IS THE CURRENT CONDITION OF YOUR HAIR? (check all that apply)

- normal  oily  fine  
 dry  coarse  chemically treated (colored, relaxed or permed)

## 2. WHAT ARE YOUR HAIR CONCERN(S)? (check all that apply)

- thinning/hair loss  breakage  lack of volume  other  
 dandruff  grey  split ends  
 dryness  frizz  lack of shine

## 3. WHAT ARE YOUR FAVORITE SCENTS? (check all that apply)

- fresh (zesty and clean, bursting with fruits, greens or water-based aromas)  
 floral (pure and flowery, with mixed bouquets of jasmine, rose or gardenia)  
 oriental (rich and warm, wrapped in spicy, sugary or opulent floral notes)  
 woody (nutty and spicy, with sensual notes such as amber or sandalwood)

## 4. WHICH MEN'S CATEGORIES INTEREST YOU MOST? (check all that apply)

- skincare  body care  shaving/grooming  
 fragrance  hair care  other

# **Personalization**

**Scenario based**

# Scenario-based / Multistage

Driving more relevant interactions by leading a customer through a pre-defined sequence of events (scenario) designed to lead them along a path toward achieving a specific business goal.

Events triggered by specific customer actions:

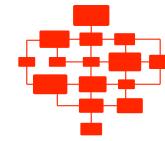




Search /  
Navigation



Segments



Scenarios

Use explicit interaction to  
trigger targeting

Katrina's ACCOUNT (sign out)

BEAUTY INSIDER VIB 613 points

order st

SEARCH 

MAKEUP SKINCARE FRAGRANCE BATH / BODY HAIR TOOLS / ACCESSO

## my basket

free shipping: add \$14.00 to your order to qualify.



SEPHORA COLLECTION Deluxe Airless Travel Kit

ITEM # 1374867

QTY 1

3 free samples: Choose up to 3 samples from the area on the right.

Promotion Code

1 code per order

apply

[view current promos](#)

# SEPHORA

free shipping! on orders over \$50

MAKEUP SKINCARE FRAGRANCE BATH & BODY HAIR TOOLS & ACCESSORIES NATURAL MEN GIFTS [beauty advice](#)

samples  
on the *fly*

ONE WEEK ONLY • ENDS AUGUST 30  
ONLINE ONLY

PICK AND PACK 5 JET-SET SAMPLES FROM OUR FAVORITES—FREE WITH ANY ORDER.\*

[CHOOSE YOUR 5 ▶](#)

BROWSE YOUR SAMPLE CHOICES BELOW AND PICK YOUR 5 FAVORITES:



*luxe* body cream

Select this sample  
SEPHORA COLLECTION  
Super Supreme Body Butter



*glamorously chic* floral

Select this sample  
Jennifer Aniston  
Eau de Parfum Spray



*pore-minimizing* balm

Select this sample  
Benefit Cosmetics  
The POREfessional



*antiwrinkle* eye cream

Select this sample  
Philosophy Miracle Worker  
Anti-Aging Eye Cream

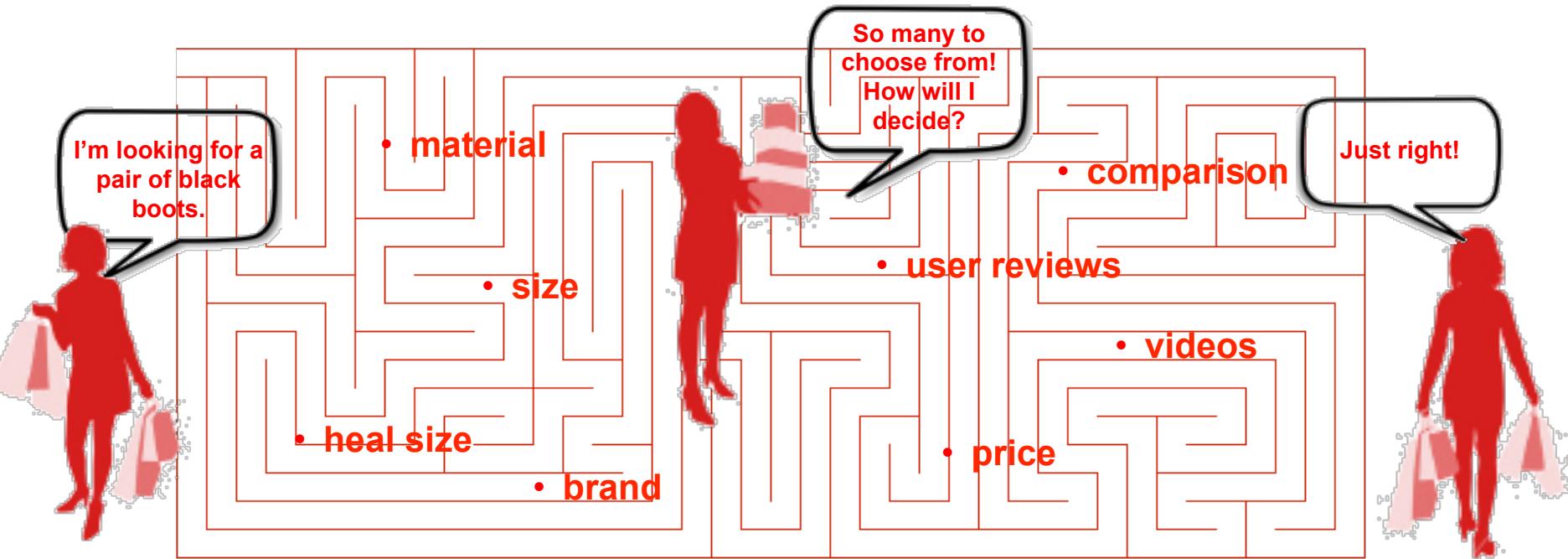


# **Personalization**

## **Content-targeting**

# Content Targeting

Driving more relevant interactions by showing the customer just the right content related to their product research – at just the right time and in the right channel – to build their confidence to complete their purchase.



[Products](#)[Solutions & Services](#)[Account Centre](#)[More search options ▾](#)Search for...[Hardware](#)[Software](#)[Brands](#)[Best Deals](#)[Product Finders](#)[Favourites](#)

## Location

Content, promotions,  
merchandise based on  
geography.

## CDW SPOTLIGHT



**Cisco Catalyst 3750X-24P Managed Switch**  
High availability,  
scalability, security,  
energy efficiency, and  
ease of operation!

[More](#)

Welcome to CDW  
For targeted information,  
select from the options  
below:

- » Healthcare
- » Education
- » Municipal
- » Federal

## SHARE YOUR SECURITY STORY

Your business could be featured in our national magazine, *Aptitude*.

[Learn More](#)

## Segment

Content, promotions,  
merchandise based on user  
profile or segment.

Security  
Switches  
[View All](#)

Tablets  
Under \$500  
[View All](#)



**ACCESSORIES**  
Cables  
Keyboards  
Mice & Trackballs  
[View All](#)



**DATA STORAGE**  
Top Sellers  
Hard Drives  
Media  
NAS



**HP 5120-24G-PoE+**

Supports static Layer 3 routing, Performance in an incredibl



**Lenovo ThinkPad T430u**

Allow content to be spanned



**C2G USB to HDMI Adapter LaCie 5big Office with Audio**

full data protection, superior



**LaCie 5big Office with Audio**

# Personalization: Leveraging everything you know



Search /  
Navigation



Segments



Device Profile



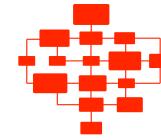
History Analytics



Social



Context /  
Clicks



Scenarios

Use explicit interaction to  
trigger targeting



Recommendations

Cross-sell, up-sell, and  
recommend the most  
relevant merchandise

# Oracle Commerce Personalization

- ATG
  - Scenario Engine
  - Profiles
  - Segments
  - Targeters
- Endeca
  - Search
  - Navigation
  - Content-targeting

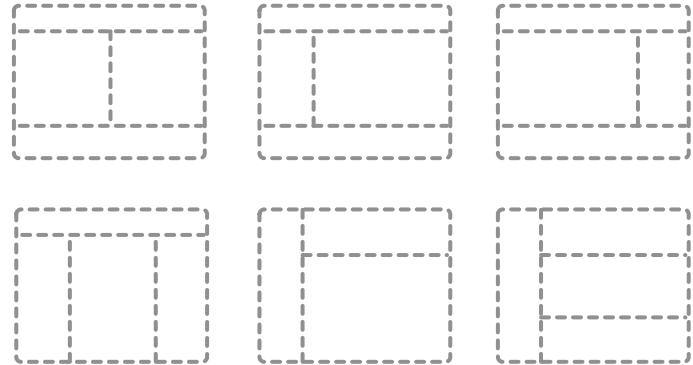
# Personalization use cases

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# Components of an Oracle Commerce Site Experience

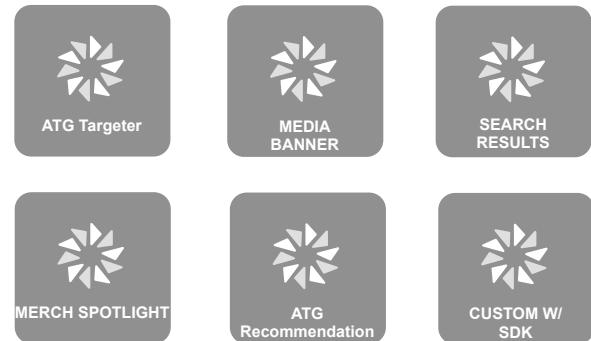
## Templates

- Prebuilt page layouts that determine where content and data is placed and how it should be rendered.
- Templates are selected in Endeca Experience Manager and rendered by ATG application servers



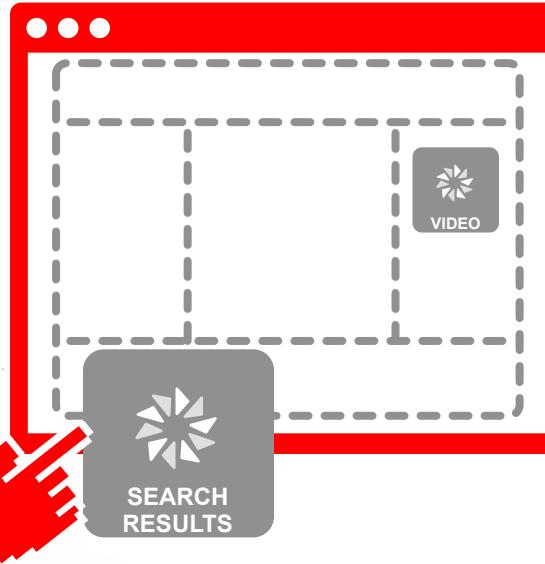
## Cartridges

- Prebuilt, modular components that serve data from the Endeca engine, ATG, and external systems.
- Cartridges are selected and configured in Experience Manager and may serve content that is managed in the BCC
- In addition to those out of the box, technical teams can create custom cartridges depending on the specific business needs.



# Templates and Cartridges Work Together

Choose a template



Choose cartridges

Sample Cartridges



RESULTS LIST



GUIDED  
NAVIGATION



ATG SLOT



BREADCRUMBS



MEDIA BANNER



SEARCH BOX

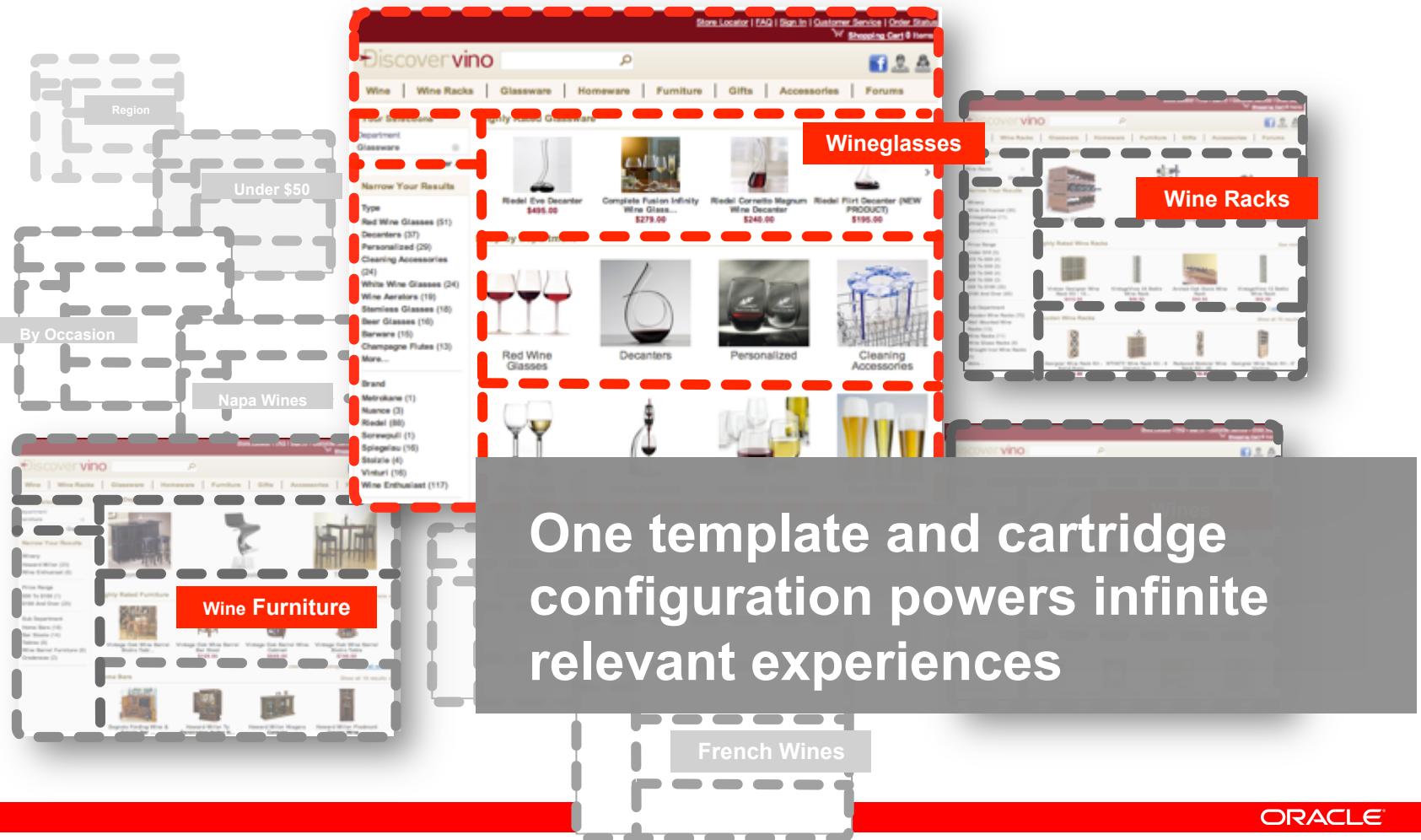


CROSS-SELLS



REVIEWS

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# Default Category Page - Anonymous

## Category Page for Cookware

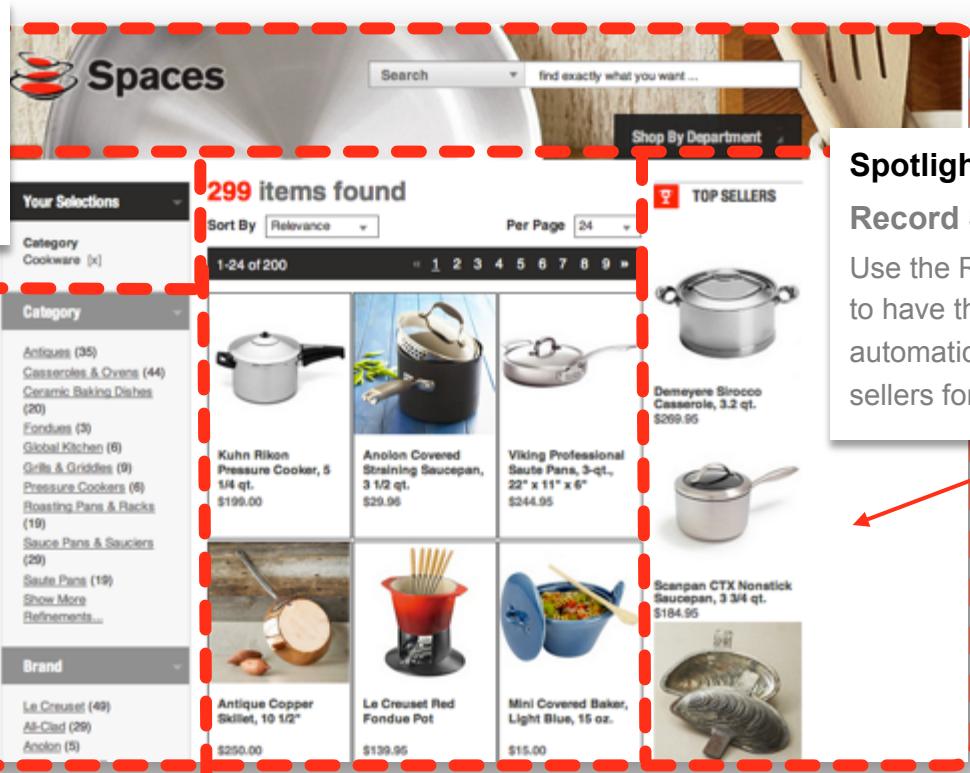
### Category Page Template

Page can be triggered when the shopper navigates to or searches for cookware

### Category Navigation

#### Guided Navigation Cartridge

Show most relevant refinement options based on customer context and all available data indexed (can come from ATG product catalog in addition to other sources like ERP for pricing or inventory)



### Spotlight

#### Record Spotlight Cartridge

Use the Record Spotlight cartridge to have the Endeca MDEX engine automatically display the best sellers for the current category

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# Category Page Spotlight Recently Viewed

## Spotlight

### Recently Viewed Cartridge

Retrieve the most recently viewed products from the shopper's ATG profile

The screenshot shows a web-based shopping interface for 'DiscoverOffice'. At the top, there are links for 'Logout | Customer Service | Order Status | Shopping Cart & Items'. Below this is a navigation bar with 'DiscoverOffice' and 'Standard search'.

The main content area features a 'MINI CART' section with tabs for 'Products', 'Finders', and 'Quick Order'. To the right of this is a 'Narrow Your Results' sidebar with sections for 'Show Only Previously Purchased Products', 'Brand' (listing various manufacturers), 'Price' (under '\$1,000' and '\$1000 To \$5000'), 'Rating' (from 0.00 to 5.00), and 'Shipping' (Free).

The central part of the page displays a 'Welcome back!' message and a note about having 4 orders. It includes a 'Compare up to 5 items' button and a 'Display' dropdown menu set to 'Grid'.

A red dashed box highlights the 'Featured Products' section, which contains three items:

- Orbitz Retractable Gel-Ink Pen, Medium Point, Black, Dozen** - \$10.34
- Orbitz Retractable Gel-Ink Pen, Medium Point, Blue, Dozen** - \$11.49
- EnerGel® Alloy Retractable Gel Pen, Silver Barrel, Medium Point, Black, Each** - \$6.39

Each product listing includes an image, a brief description, and a price. To the right of the featured products, there is a vertical sidebar with a 'New' section containing five items, each with a 'Item # / search' link. At the bottom right is the 'ORACLE' logo.

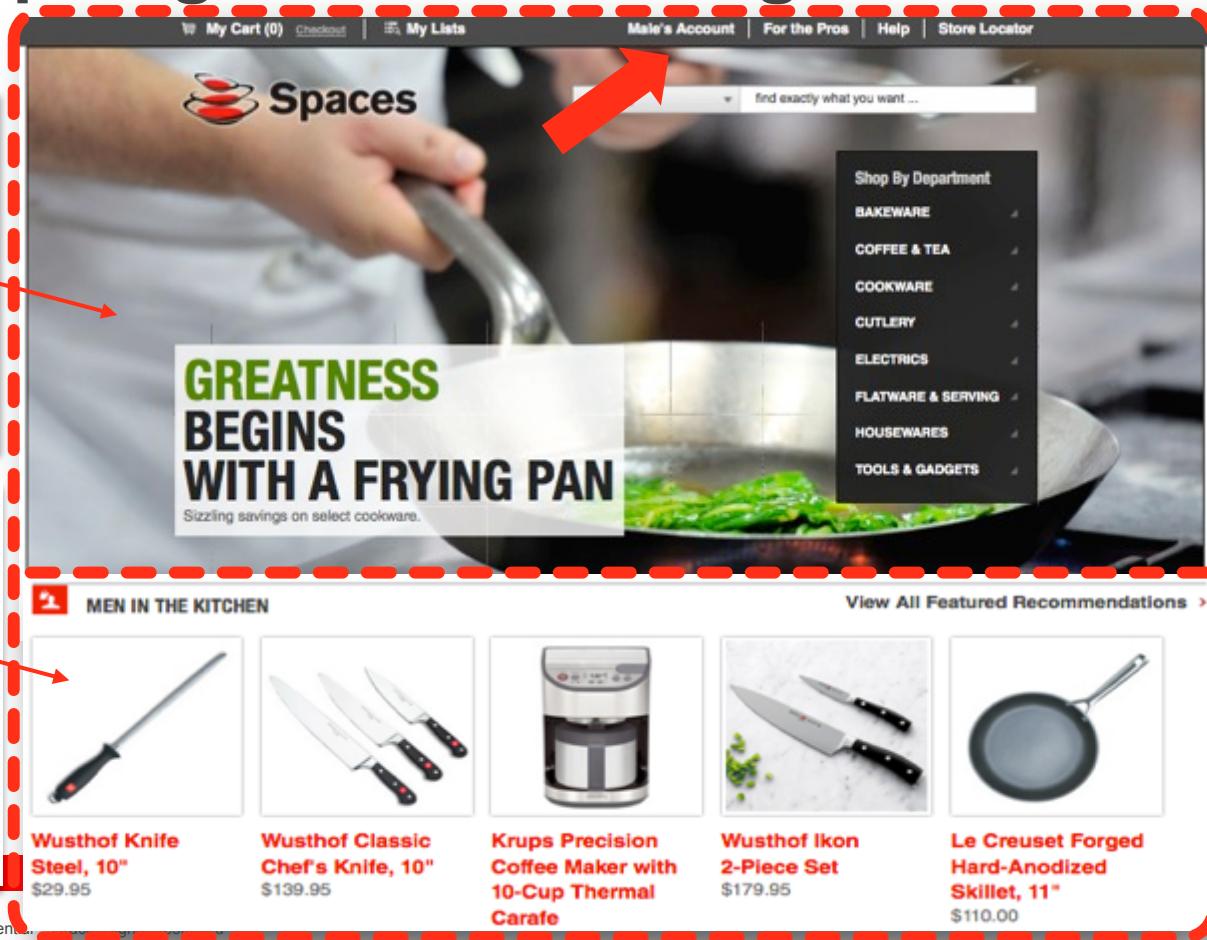
# Category Page : Spotlight Based on Segment

## Category Image

### Media Banner Cartridge

### User Segment Trigger

Use the Endeca Media Banner cartridge to display an image based on the user segment (image can be stored in ATG or another system such as a DAM)



## Spotlight

### Record Spotlight Cartridge

### User Segment Trigger

Configure the Record Spotlight to retrieve the most expensive products from elite brands and trigger this spotlight only for those shoppers in the Male segment as determined by their ATG profile

# Content based on Scenario

## Promotional Content

### ATG Slot Cartridge

Use an ATG Slot cartridge to display results of an ATG Scenario. For example, display Wusthof promotional content to shoppers who have registered for the first time and added a cutlery product to their cart

The screenshot shows a retail website for 'Spaces' featuring a promotional banner for 'STAY SHARP PROFESSIONAL CUTLERY'. The banner includes the text 'Perfect for defending against zombie attacks too!' and several knives displayed. To the right is a sidebar titled 'Shop By Department' with categories like BAKEWARE, COFFEE & TEA, COOKWARE, CUTLERY, ELECTRICALS, FLATWARE & SERVING, HOUSEWARES, and TOOLS & GADGETS. Below the banner is a section titled 'TODAY'S HOT DEALS' with three items: 'FREE SHIPPING' (image of a box), 'SAVE BIG' (image of knives), and 'BUY 2 GET 3RD FREE' (image of knives). A red dashed line highlights the 'TODAY'S HOT DEALS' section, and a red arrow points from the text in the adjacent box to the same section on the website.

# Content based on Targeters and Segments

## Promotional Content

### ATG Targeter Cartridge

Promotional content based on rules defined in ATG Targeter dependent on items currently in the shopper's cart. Trigger luxury content when the shopper has > \$2000 in their cart.

The screenshot shows a website for 'Spaces' featuring a promotional banner for 'STAINLESS LUXURY IN YOUR KITCHEN'. The banner includes a callout for brushed stainless steel cookware & accessories. A red arrow points from the text 'Promotional content based on rules defined in ATG Targeter dependent on items currently in the shopper's cart.' to this banner. Another red arrow points from the text 'Trigger luxury content when the shopper has > \$2000 in their cart.' to a 'SPOTLIGHT ON LUXURY' section below. This section features an invitation for VIP Club members to an exclusive chef demonstration. A red arrow also points from the text 'Promotional content based on rules defined in ATG Targeter dependent on items currently in the shopper's cart.' to the 'View All Luxury Items' link. The right sidebar lists categories under 'Shop By Department': BAKWARE, COFFEE & TEA, COOKWARE, CUTLERY, ELECTRICALS, FLATWARE & SERVING, HOUSEWARES, and TOOLS & GADGETS. The bottom navigation bar includes links for 'Enclume Dutch Oven', 'Démeyere Sirocco Casserole', 'Démeyere Atlantis Casserole', 'DeLonghi & Neapolitan', and 'LE'.

# Demonstration / Vision

# Oracle Commerce Vision Demos

Customer Personalisation Experience Solution Demonstration

- B2C and B2B demo environments showcasing the power of the combined solution of ATG and Endeca

→Discover**Office**



# Best Practices Summary

# Oracle Commerce Personalization

## Recommendations

- Use as much data as is known about a shopper to provide unique and compelling experiences
- Manage profile data and user segments in ATG and leverage the segments in Endeca Experience Manager
- If content or layout is based on the shopper's location in the catalog or a pre-defined user segment, use cartridges that retrieve data from Endeca
- If content is based on a sequence of events in the shopper's session or across sessions, use ATG Scenarios contained in an ATG Slot Cartridge
- If content is based on complex rules specific to the shopper's session, use an ATG Targeter and an ATG Targeter Cartridge



# Personalization Roadmap

# Oracle Commerce Personalization Roadmap

- Unified segment creation; segments created in ATG will automatically be available for use in Endeca
- Out-of-the-box integration of Endeca search and navigation behavior into ATG profiles
- Leverage profile attributes to more dynamically trigger experiences without pre-segmenting users
- Pre-packaged capabilities to leverage ATG profile data in search relevancy





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OPEN  
WORLD**

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# **Hardware and Software**



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