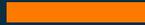




© CASK Communications



PERSONALIZATION

The Good, The Bad, The Creepy... The GDPR

August, 2018

© 2018
PHASE2
-and-
CASK Communications

Meet Your Speakers



Amy Shropshire

Founder and Principal Consultant-
CASK Communications

Faculty in Art, Media, and Design-
Columbus State Community College

@AmyShropshire



Annie Stone

Director of Marketing,
Phase2

@anniestone2

@Phase2

Collaborative Notes

<http://bit.ly/2018GovConPersonalize>



Personalization?



One organization speaking specifically to one end user.



Personalization means a system or AI decides what a user sees.

Personalization vs. Customization

Personalization happens within a system that organizes user demographics and behavior into segments so that tailored content can be served to that person

Customization is when an interface or notification is formatted by the user to meet their needs.





Website



Email



Landing Pages



Advertisements



Direct Mail



Chatbot

What Channels are used for personalizing Digital Experiences?

Calls-to-action (CTAs) personalized to individual visitors have a 42% higher view-to-submission rate than generic CTAs that appear the same for every visitor. ([HubSpot](#))

Why Are Orgs Investing?

79% of consumers say they are only likely to engage with an offer if it has been personalized to reflect previous interactions the consumer has had with the brand. ([Marketo](#))

By 2020, 51% of consumers expect that companies will anticipate their needs and make relevant suggestions before they make contact.
([Salesforce](#))

Consumer Expectations

Studies suggest that the general public expects and anticipates their digital experiences to be personalized.



***Personalization Has Become The
Cornerstone of Customer
Experience***



*By 2020, customer
experience will overtake
price and product as the
key brand differentiator.
-Gartner*

**And it turns out a
customer's digital
experience is
pretty important.**

Benefits

Of Personalization

- Increase conversions
- Increase customer retention and loyalty
- Lower customer support costs

The background of the slide is a dark blue, semi-transparent image showing a pair of hands holding several sheets of paper. The papers appear to be documents or forms, with some text and tables visible but mostly obscured by the blue overlay. The overall aesthetic is professional and data-oriented.

Risks *(and Opportunities)*

Not having a good reason



The Good

easyJet

Reconnecting with past passengers through a personalized email campaign.

- 12 million unique emails
- 100% more opens
- 40% more click throughs

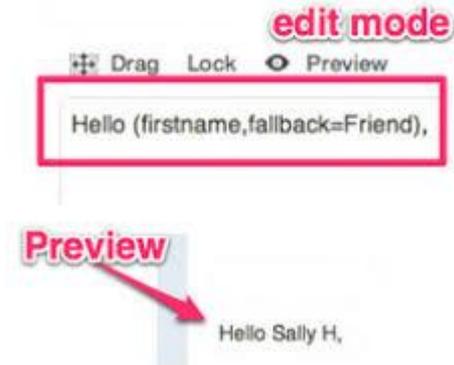
The Bad

“The insult”



<https://blog.hubspot.com/blog/tabid/6307/bid/34013/The-Dangers-of-Premature-Marketing-Personalization.aspx>

Not having the data



The Good

Starbucks

Using past order history and location to make purchase suggestions within the app.

- Drove \$6 million in sales
- App accounts for 22% of revenue

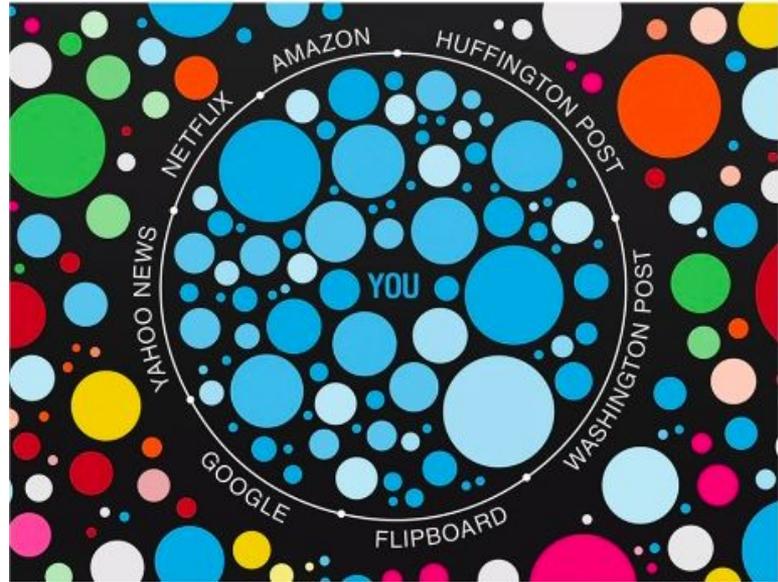
The Bad

“The <<First Name>>”

Dear *IFULLNAME!*,

At ██████ we rely on your feedback so that we can serve your employees. We hope you'll provide your candid:

The “Filter Bubble”

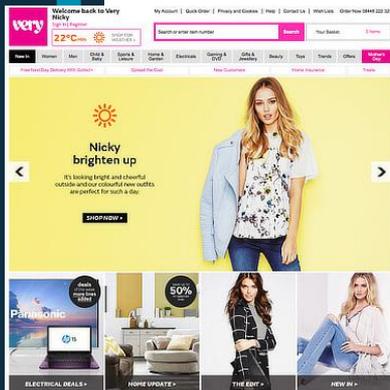


Eli Pariser, author of "The Filter Bubble: What the Internet is Hiding from You"

The Good

Very

Personalized content based on weather.

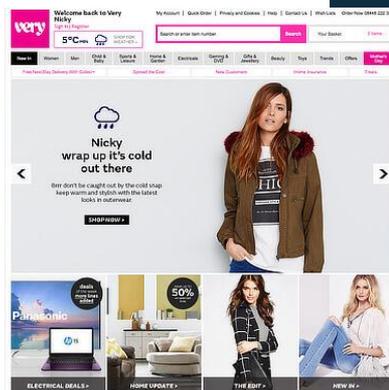


The Bad

“The Winter Coat”

You purchase a winter coat online. You then receive emails about winter coats, ads for winter coats, and personalized site content on winter coats.

How many winter coats do you need?



A note about GDPR

The regulation "applies to all companies processing and holding the personal data of data subjects residing in the European Union, regardless of the company's location."

Therefore, any organization with visitors (users) from the EU to its website or customers from the EU who purchase its products or services is impacted by the GDPR.

<https://www.acquia.com/sites/acquia.com/files/documents/2018-05/Acquia%20GDPR%20and%20Personalization.pdf>

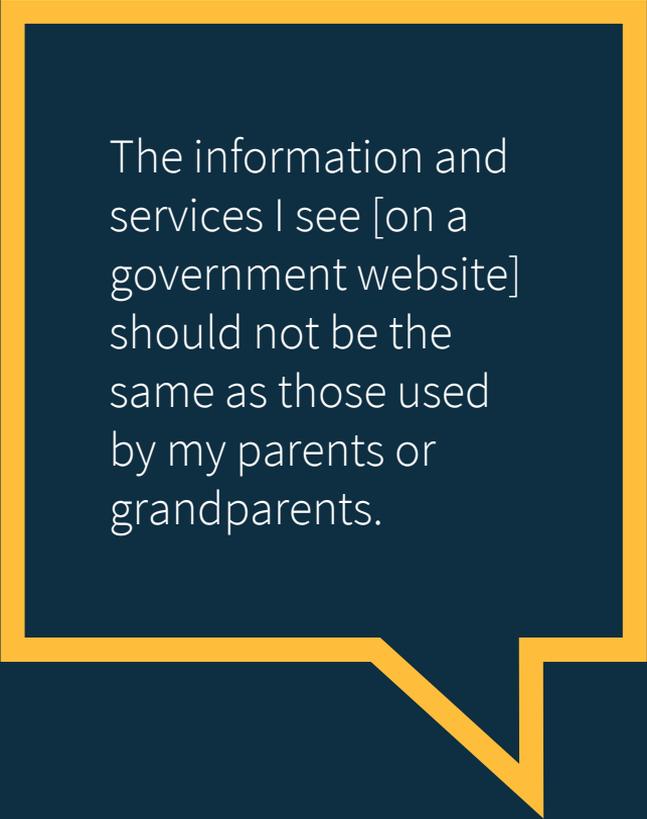
GDPR

How do you play by the new rules?

- Talk to an attorney
- Follow best practices
- Know the rules whether you personalize or not



Government Use Cases



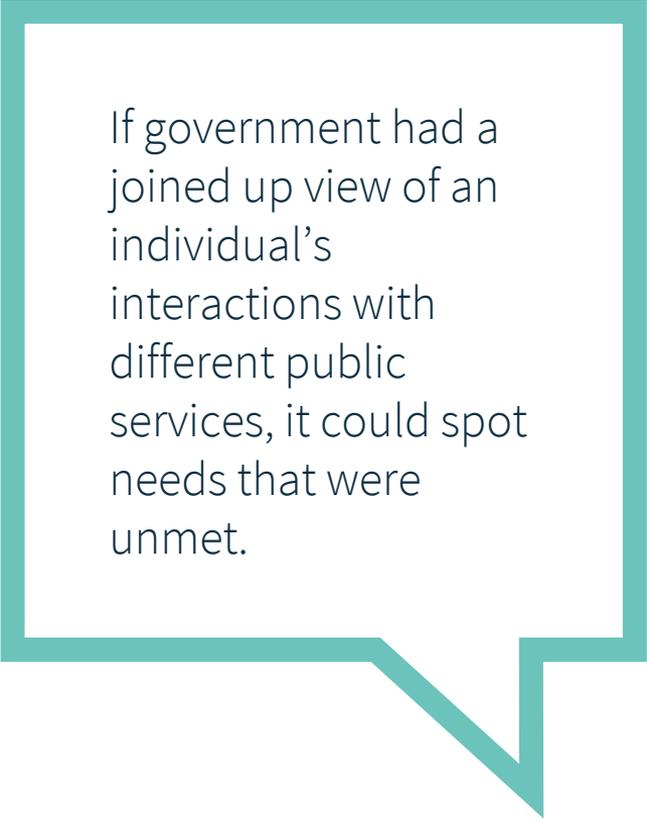
The information and services I see [on a government website] should not be the same as those used by my parents or grandparents.

Why Personalize Government?

Better equipped to address the needs of the modern citizen

[Marlieke Kieboom](#)

https://medium.com/@marli_k/five-things-to-think-of-when-personalizing-digital-government-services-81b70b578efb



If government had a joined up view of an individual's interactions with different public services, it could spot needs that were unmet.

Why Personalize Government?

Allow governments to spot service delivery gaps

Personalized government would suggest other services based on a person's age, demographic or location. For example, why not be prompted to sign up for organ donation or giving blood when renewing a driving licence online?

Why Personalize Government?

Enable digital nudging of citizen's behaviours

**Ok! Where
do you start?**



DATA

Start here.

- What kind of user behavior are you currently capturing?
 - Is it enough to understand your users and their behavior?
- Do you have people and resources to analyze your data in order to anticipate your users future needs?
- Where are the gaps?

Personas

Data > Analysis

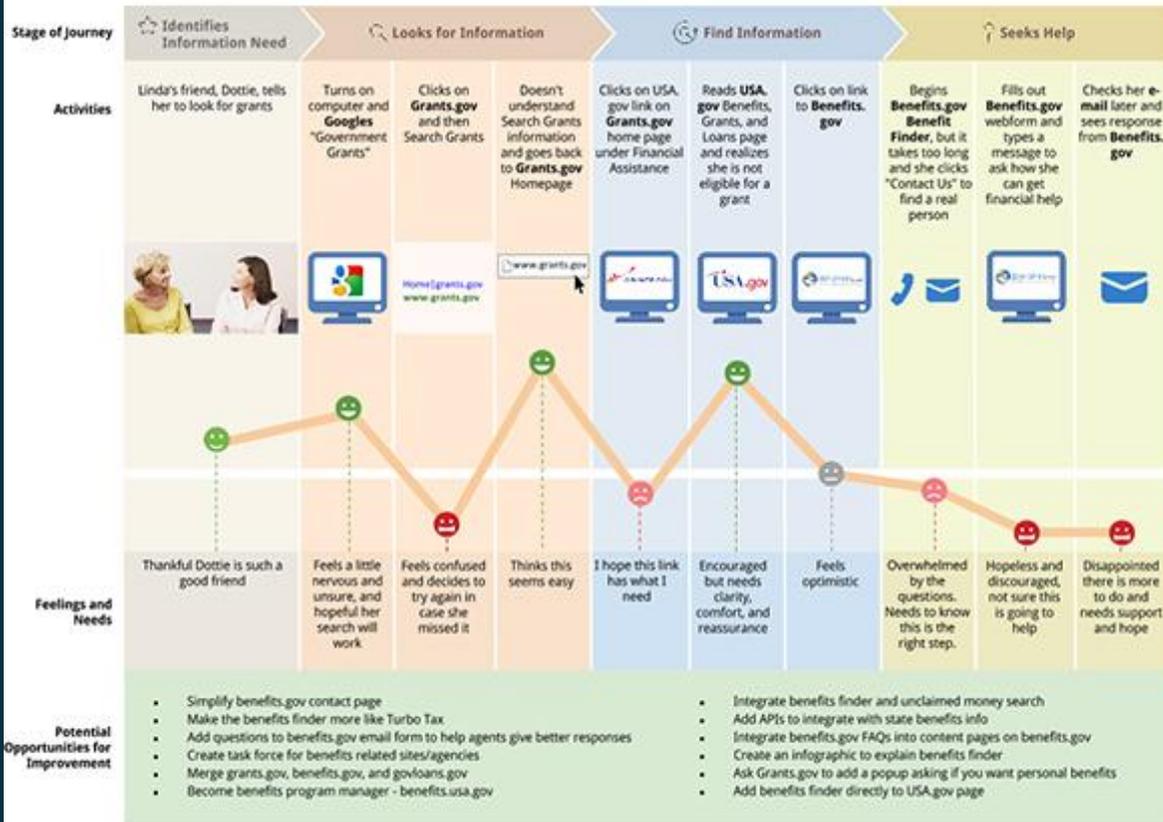
- Who is your target audience?
- What are their demographics?
- What kind channels do they use to access information?
- What are their needs, wants, fears, jobs to be done
- Can you trace a customer journey with the data you have?

USA.Gov Journey Map



Linda's Journey Map

Browse information or learn more on a general topic



Source: [DigitalGov](#)

Defining Success

Data > Analysis > Defining Your
Goals

- How can user engagement serve your goals? (Efficiency? Lower costs? decrease calls?)
- Who are the stakeholders and how do they define success?
- Define Quantitative and Qualitative Goals
- Define the process and tools and timeframe you will use to measure progress against those goals
- Can you assign a \$ value to a conversion?

Develop Strategy

Data > Analysis > Goals > Strategy

- What staff or vendor will be helping to implement and manage?
- technology and tool strategy
- Define roadmap based on goals

Levels of Personalization

SEMI-AUTOMATED



BENEFITS

- ▶ Lower barrier to entry
- ▶ Minimal up-front financial investment
- ▶ May be achieved with existing technology stack



CHALLENGES

- ▶ Human resource intensive
- ▶ Reliance on manual input may slow down delivery of content



CONDITIONS

- ▶ Empower staff to make decisions about how to respond to consumers in near real-time



CULTURE

- ▶ Trust



TOOLS AND PLATFORMS

- ▶ A CMS that can publish to various touchpoints
- ▶ Lightweight automation of content distribution



PEOPLE

- ▶ Content editors
- ▶ Community/ engagement managers



FINANCIAL

- ▶ Sufficient funding for human resources (staff and/or outsourced) necessary to execute workload

PROGRAMMATIC

Programmatic models rely on automated systems that collect data on users and automatically deliver content to consumers when they meet specific predefined standards.

- Far lower staffing requirements
- Real-time reaction to consumer interactions
- Higher technical requirements → Requires systems to manage automated content distribution



BENEFITS

- ▶ Minimizes staff resources necessary to manage consumer interaction
- ▶ Response to consumer interaction happens in near real-time



CHALLENGES

- ▶ Requires systems to manage automated distribution of content based on designated conditions



CONDITIONS

- ▶ Leverage deep understanding of consumer needs, behaviors, environments, etc. to define automated delivery of digital experience



CULTURE

- ▶ Testing



TOOLS AND PLATFORMS

- ▶ Marketing automation software with content distribution capabilities



PEOPLE

- ▶ Marketing or Experience managers skilled in marketing automation



FINANCIAL

- ▶ Funding for the addition of marketing automation software of systems used for content distribution

PREDICTIVE

A predictive model leverages an intelligent system that learns from consumer engagement with a brand over time, tailoring content to individual users based on context (i.e. the device used or the types of content they like).

- Lowest staffing requirements of the three (system self-optimizes)
- Requires new predictive technologies → more risk and higher price tag



BENEFITS

- ▶ System self-optimizes, further reducing human resources necessary



CHALLENGES

- ▶ Predictive technology is new, which brings an unknown level of risk with implementation



CONDITIONS

- ▶ Design in-house, or partner with experts who can design, develop, and train predictive engines



CULTURE

- ▶ Security
- ▶ Transparency



TOOLS AND PLATFORMS

- ▶ Predictive engine



PEOPLE

- ▶ In-house or contracted resources to manage predictive experience



FINANCIAL

- ▶ Line item for expert consulting on predictive modeling and engines

Measuring Impact

- Work backwards from your goals
- *Then* move forward



Default date range is the previous month

Jul 1, 2017 - Jul 31, 2017

What do we want to know?

How much are our marketing efforts to drive traffic to [redacted] com costing us?

How are answering this question?

Through Google Analytics Acquisition, Source / Medium cross-referenced with Google AdWords Cost Per Click data (and any other paid opportunities data as needed)

What do we do with the answers?

- * Identify which sources are good uses of our marketing dollars.
- * Make adjustments to our marketing strategy based on performance

Next Steps?

* Figure out the best way to track our entry fee vs return for WebAwards.org. For example, the traffic we are receiving now is from a 2014 entr. So do we use the 2014 entr fee? Distribute the entr fee per month? Another way?

<https://www.drupalgovcon.org/2018/program/sessions/audience-acquisition-and-analytics-survival-guide>

What was this presentation about again?

- Personalization is the cornerstone of user engagement
- There are risks to personalization but also a lot of opportunities in government
- Data is key, and a data audit is a great place to start when thinking about personalization
- People and Process are just as important as personalization tools

Discussion



- Do you see opportunities for personalization in government?
- Have you discussed personalization for your organization?
- Can you think of personalization tactics that have worked really well in consumer brands that could be helpful for government?



Q&A