



CONSORTIUM OF  
PERSONALIZATION  
PROFESSIONALS

P R O C E E D I N G S

# CPP 2020

## Winter Meeting



**BOSTON, M.A.**  
**Wednesday, February 12**  
**Servcorp Boston**  
**9:00 – 5:00 EST**



B O S T O N

### **Servcorp Boston**

Executive Boardroom  
One International Place  
100 Oliver St. Suite 1400  
Boston, MA 02110

Hosted by

avenue | CX

# Personalization in the new decade: one step forward, two steps...

*The winter meeting covered backlash in the marketplace, personalization with GDPR, and evolving practice models*

## ORDER OF EVENTS

**Opening round table** of field updates from everyone, for those that have interesting comments or notes from their practice, or industry notes. Averages about 10 min a piece but may spark discussion

**Kevin Nichols** to present on and lead a discussion on personalization in the age of GDPR and privacy restrictions – ways to think about personalization beyond cookie-based approaches.

**Lunch**—the discussion continues

**John Berndt** to present on and lead a discussion around personalization and innovation and technology. Special focus on paradigms of profiling in the product space and structural platform issues.

**Remaining time** will be used for ad hoc discussions and CPP group next steps.

## NEW MEMBERS



**Cruce Saunders**  
Founder and principal at [A]

Founder and principal at [A], Cruce and team work with the most complex enterprise content publishers on Earth, helping leaders move to next-generation, intelligent customer experiences.

Cruce is author of and author of *Content Engineering for a Multi-Channel World* and keynotes worldwide on omnichannel customer experience, content intelligence, content engineering, content operations, content asset valuation, intelligent content, machine learning, AI, cognitive systems, customer experience platforms, and 'intelligence transformation'. [A] operates in the US, Canada, Mexico, and Latin America and works with the leaders who own responsibility for some of the most valuable content assets in the world including Fortune 50 enterprises, knowledge-centric mid-market organizations, governments, associations, and other content-centric institutions.



**Lars Birkholm Petersen**  
Co-founder at Altola, Inc., and Uniform

Lars is co-founder at San Fransico based **Altola, inc.**, a boutique agency focused on architecting personalized digital experiences. Altola is born out of Sitecore and specializes in optimizing business value from Sitecore, Contentful, Jahia and connecting the digital experience stack.

Lars is also co-founder at **Uniform**, born out of working with multiple clients, agencies and various digital experience vendors. The focus on Uniform is to help connect existing and new digital marketing technologies, making it easier for companies to build modern digital experiences on legacy systems, as well as choosing the right stack for their needs. Uniform is bringing the JAMstack (JavaScript, APIs, Markup) to the Enterprise and help with blazing fast site performance, faster time to market and one place to create and maintain your different web and app stacks.



# Year in Review: Themes and Observations

## Backlash in the marketplace?

Gartner predicts **80% of marketers will abandon personalization efforts by 2025**.<sup>\*</sup> While this claim is sensational, the underlying theme is reasonable. Reasons include the overselling of marketing engines, lots of adoption, lots of failure. "Lots of systems in this space seem like they were built never to be used," says **John Berndt**. "You can build a Byzantine empire of personalization, but all you need is one super bowl ad to take out your site because personalization can't handle 5x loads." **Lars Peterson** suggested a novel architecture of delivery where JavaScript hosted on a **CDN** (Content Delivery Network) provides dramatic scalability improvements.



## Continuing to sub-define data

Petersen observes an ongoing stratification in how we think about data sources. He suggests three categories: Data that is available as soon as a visitor arrives (i.e. geo, device, etc.); behavioral data, or session data from system (goals, events, profiling based on actions); and

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"All you need is one super bowl ad to take out your site because the personalization can't handle 5x loads."

-John Berndt

then existing customer data. In addition to first and third party data, **Amanda Shiga** notes the increasing importance of **zero-party data**. Continue to think about **transparency UX** to ensure users are aware.

## Tracking micro-interactions

Traditional ML requires data at scale, but how do you collect behavioral data when you don't have a lot of pages to begin with? **Mara Low** suggests metrics can include scroll-past or "depth-of-scroll", video engagement, in-page toggle, or overall time on page.

## Failures of demonstrable ML

ML continues to elude all except the elite.

**Cruce Saunders**: "Netflix, Uber, Amazon, Alibaba, run on actual graphs. The relationship of graph structures as a way to understand edge-based relationships is far more effective than building a per-person index."

<https://www.gartner.com/en/newsroom/press-releases/2019-12-02-gartner-predicts-80--of-marketers-will-abandon-person>



# Acquisition Watch

## ORACLE + CROWDTWIST™

### Oracle buys CrowdTwist

**October 2, 2019** Oracle announced it signed an agreement to acquire CrowdTwist, the leading cloud-native customer loyalty solution to empower brands to offer personalized customer experiences. The CrowdTwist solution offers over 100 out-of-the-box engagement paths, providing rapid time-to-value for marketers to develop a more complete view of the customer. The transaction is now closed and the CrowdTwist team will join the Oracle Customer Experience (CX) Cloud organization.

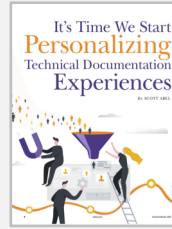
## monetate KIBO™

### Kibo Buys Monetate

**Oct. 10, 2019** Kibo, a leader in cloud commerce, announced it has entered into an agreement to acquire leading testing and optimization provider, Monetate. The addition of Monetate will enable Kibo to offer A/B & multivariate testing, content personalization, and audience building & targeting with an intuitive, self-serve user interface designed for merchandisers and marketers. Certona is the #1 Personalization Provider and Monetate is the #2 Personalization Provider according to the Internet Retailer Top 1000. Both Certona and Monetate were named Leaders in the 2019 Gartner Magic Quadrant for Personalization Engines, anchoring on their respective strengths of recommendations and testing.

<https://www.oracle.com/corporate/acquisitions/crowdtwist/>  
<https://monetate.com/blog/news/kibo-monetate-acquisition/>  
<https://www.evergage.com/blog/evergage-has-joined-the-salesforce-family/>

## HONORABLE MENTION

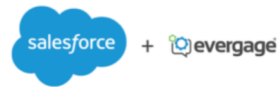


### CPP Quoted in Intercom Magazine

*Personalizing Technical Documentation Experiences by Scott Abel*

**CPP Fellow Colin Eagan** is quoted in the January / February issue of Intercom magazine. "[Insert name here]' is not a personalization strategy," says user experience manager, Colin Eagan. "It's an unsophisticated tactic — it's a lackluster attempt at addressing the needs of the organization by professing to address the needs of consumers."

More Info: [stc.org/intercom](http://stc.org/intercom)



### Salesforce Buys Evergage

**February 3, 2020** Salesforce, the global leader in CRM, has completed its acquisition of Evergage. Evergage real-time, cross-channel personalization and machine learning capabilities complement Salesforce Marketing Cloud's robust customer data, audience segmentation and engagement platform, enabling companies to deliver more relevant experiences during moments of interaction across the entire customer journey.



# The Ongoing Quest for Content Intelligence

Despite improvements in metadata and semantic models, the holy grail of content intelligence remains elusive. “Personalization doesn’t come because you bought a tool; it comes out of content sets that enable you to have those interactions” says Cruce Saunders of [A]. There is an ongoing debate about whether the future of content will ever be totally semantic, or rather it’s best to concede defeat and leave it to scraping and ML.

## Optimizers Vs. CMS for Personalization

Plug-and-play products reverse engineer the document object model (effectively swaps out a DIV.) The **alternate content** needs to contain front-end code. The great argument for the CMS approach to personalization is you don’t have to have developers switching out the code. Optimizers would be stronger if they integrated natively with CMS content stores.

## Positive signs of progress

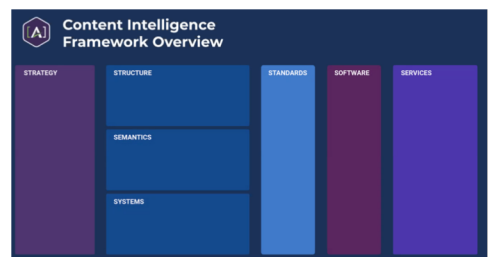
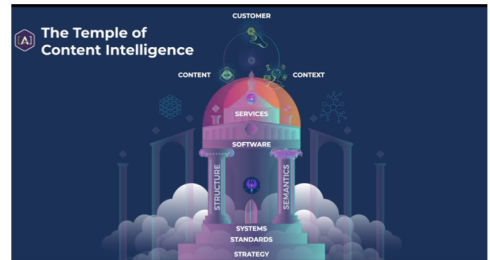
- **Chatbots** and other self-help tools are driving investment in conversational content
- **Semantic search** and content recommendation engines are driving more coherent use of tags and other semantics
- **Broad adoption** of more systemic personalization practices in transactional commerce, product content and other strongly-typed content sets (e.g. movies, books, hotels).

<https://simplea.com/Treasury/Featured-Assets>

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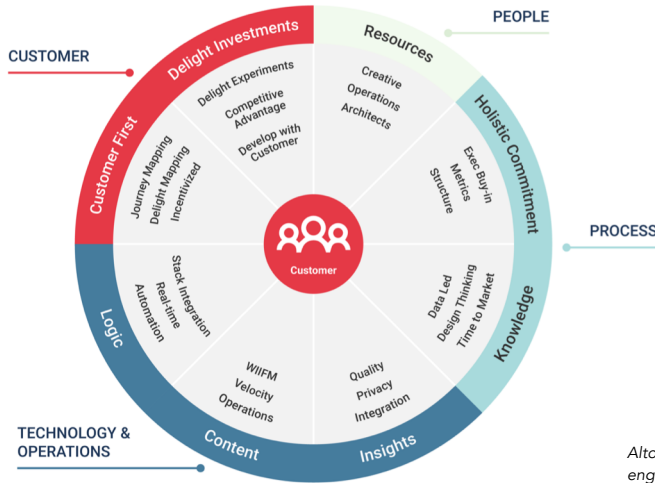
“Personalization doesn’t come because you bought a tool; it comes out of content sets that enable you to have those interactions.”

-Cruce Saunders



# The Personalization Engine

Identify gaps in readiness across eight key categories



Altola's personalization engine helps customers think across people, process and technology

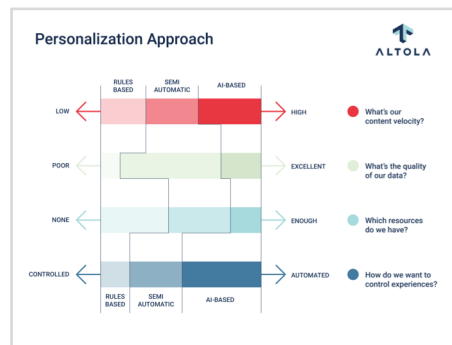
## Determining where to start

To help master personalization and connect the different pieces involved in planning, executing and scaling, Altola created the **Personalization Engine**. Based on their experience with customers of many different sized and across many industries, we have found the following to be true for each personalization approach:

**Rules-based** personalization is great for a start, but it doesn't scale. Just planning for rules-based personalization will require a lot of effort as you try to scale personalization, which would end up being unmanageable.

**Semi-automated** personalization can come in many shapes. It gives the brand a good opportunity to start with personalization that is built to scale and can support needs of the business.

**Automated** (AI-or-ML based) personalization is great for ambitious brands who have resources and investment to use AI to scale personalization. However, this approach requires data that is almost never available at the start of a project, making it very unlikely that a brand can jump into automated personalization without first having done some rules-based or semi-automatic personalization.

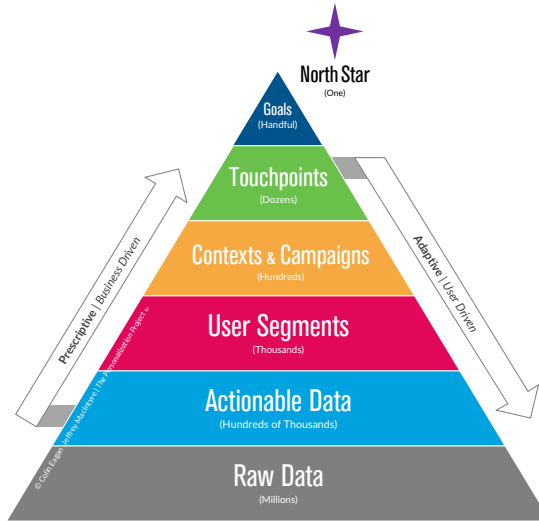


→ For More: [altola.co/thinking/finding-the-right-personalization-approach/](https://altola.co/thinking/finding-the-right-personalization-approach/)



# The Personalization Pyramid

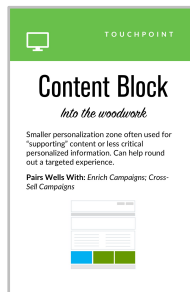
Personalization design from the ground up



Eagan and MacIntyre's personalization pyramid is preferred by four out of five pharaohs

## Soup-to-nuts personalization, without going nuts

Colin Eagan and Jeffery MacIntyre gave themselves a goal: could you create a holistic personalization framework specifically for practitioners? The answer: maybe. The *Personalization Pyramid* is the first designer-centric model for standing up a human-centered personalization programs. An accompanying **deck of cards** illustrates specific examples from each strata.



## Pyramid slices, bottom to top

**Raw Data:** Everyone has it. The question is what do you do with it.

**Actionable Data:** User data in your data model that is organized and understandable.

**User Segments:** How you are slicing your data into audiences or groups (or 1-to-1)

**Contexts and Campaigns:** What personalized content are you delivering and on what terms

**Touchpoints:** Where you are delivering content, from a web banner to in-store screen

**Goals:** Tactical, measurable metrics for your personalization program

**North Star:** You only get one; what are you trying to accomplish with personalization?

→ For more: [progressivepersonalization.com](http://progressivepersonalization.com)



# GDPR: Brand New Challenges in Data Privacy

## World governments and organizations continue to issue new guidelines

Hackers and thieves have not helped the situation; according to *Interesting Story group*.

High-level GDPR requirements include:

- **Notify visitor** of any tracking
- **Obtain consent:** mandatory, upfront and simplified messaging
- **Opting out** is allowed at any point and all data must be erased
- **Requests for data** at any point must be complied with by company
- **Collect only** what is absolutely necessary to conduct business with this user

## New Laws to Know

**GDPR:** General data protection regulation

**LGPD:** Brazilian General Data Protection Law

**CCPA:** California Consumer Privacy Act

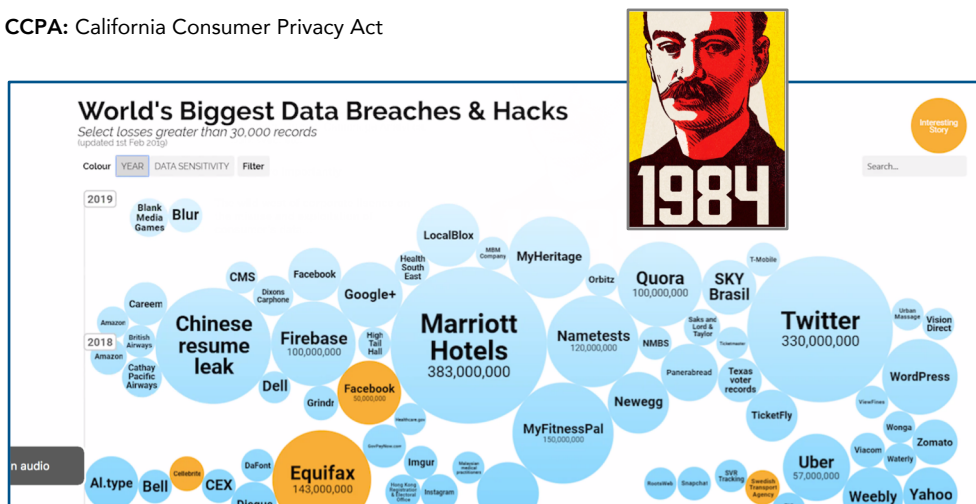
## OVERHEARD

“GDPR is still the gold standard. If you design to that, it’s still your safest bet.”

-K.P. Nichols

## Three Tiers of Data Protection

1. **Anonymization:** Data rendered anonymous in such a way that the data subject is not or no longer identifiable.
2. **Pseudonymous Data:** Always allows for some form of re-identification, no matter how unlikely or indirect. However, in theory you cannot re-identify anonymous data.
3. **Know Data.** Consent is allowed



<https://informationisbeautiful.net/visualizations/worlds-biggest-data-breaches-hacks/>





# Profiling Paradigms: Grasping for Colloquial Theories in a Machine World

When it comes to matching users to personalized content, automated techniques like segment detection are shiny; but more ‘human’ techniques like thresholding are at least comprehensible.

## Colloquial theories help you to:

- Have an idea of human behavioral predictability
- Have an idea of how individual characteristics might relate to identity
- Have an idea how identity might evolve over time (life stages, purchase stages, etc.)
- Have an idea of how to address any of the above with effective
- Be able to read the analytics reports to understand what is happening
- Adjust to improve something that is malfunctioning

## Gaps in the market?

Digital operation team niceties for high volume programs, in management of creative, rules, experimentation, enterprise control considerations.

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“One cannot simultaneously look at something and vividly imagine it.”

- Ludwig Wittgenstein

**Commercialization of journey:** A truly clear way to visualize idealized user journeys that allows for manipulation and real-time experimentation; interfaces are too rigid, the problem of representing “any” data, given the very ad hoc aspect of data structure

**Built-in ETL tools** to deal with data diversity

**Content store integrations** in non-custom scenarios are often weak

**True “Genie-Bottled ML”** seems to be emerging in small fits and starts: Evergage, curiosity about Salesforce’s contribution with “Einstein,” and other rumblings. The jury is still out on usability & suitability.

### Humanoid



#### Thresholding

Building rules (compound or not) that relate to binarily decidable events or characteristics. Did this or that happen. Subject to “the arbitrary rule problem” because of lack of weighting or calculation.



#### Segment Matching

This is the most varied category in relation to different paradigms. All systems that match characteristics or scores against a predetermined model. People who have X, Y, Z characteristics or ratios are P or Q segments. May be very automated, short of ML. Heavily dependent on conceptual modeling.



#### Decision Trees

The broad range of “inference tree” like techniques, where the decisions have a Rube Goldberg or Robotic character, which may relate to a series of interactions that unfold over time. The basis of marketing automation, journey orchestration, and to some extent, chatbots/voice (with NL complications).

### ML/Automation



#### “Segment Detection”

Techniques for discovering concentrations of users with specific characteristics, to which personalized experiences may be attached. With ML, issues related to conceptual opacity, and to sustainability, and segments are resolved differently over time.



#### “Recommendation”

Techniques associated with mapping many-to-many relationships—usually without an underlying colloquial theory of outcomes. Semantics may be established by human means (ontology); but processes are meant to outrun human inference, optimizing on the margin. Hyper-opaque, high-traffic.



# Technical Focus: Where to start

From a technical point of view, on the customer experience side, you may want to start with training a recommender to call a service, or predictive segment modeling. On the authoring side, there are helpers like sentiment analysis and pattern recognition services; also bots, NLP (natural language) and predictive modeling.

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“There are ten thousand people working on Alexa, full-time.”

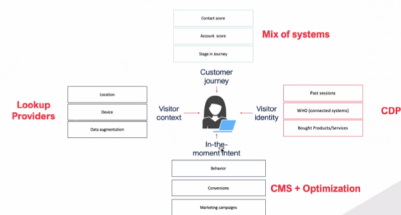
- Cruce Saunders

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“Sometimes you’ll find a pocket of amazing engagement in your site, but don’t have metrics stood up to capture data differently.”

- Jeff Cram

### Triggers for personalization



## Easy places to start



### Customer Experience

#### Recommenders

**Examples:**

- Users similar to you bought [x]
- Users who bought [x] also bought [y]
- Based on your social feed, we recommend [x]

**Where it can help:**

- Upselling, cross-selling, content suggestions

**Measurements:** Conversion rate, visitor engagement

**Sample techniques:** Train a recommender or call to a service

#### Segmentation

**Examples:**

- Propensity score
- Likelihood to renew
- Likelihood to churn

**Where it can help:**

- More targeted personalization
- Insight into customer segmentation and segment discovery
- Insight into behavior influencers; prevention of undesirable behaviors

**Measurements:** Conversion rate, visitor engagement, churn rate

**Sample techniques:** Predictive modelling and Contact facet update

### Marketing / Content Authoring Experience

#### Helpers for content metadata

**Examples:**

- Automated tagging of metadata and profiling for content and images
- Content topic clustering

**Where it can help:**

- Shorter time to value for marketer, reduction of heavy lifting

**Measurements:** Time to execute workflows

**Sample techniques:** Semantic and sentiment analysis, NLP, image pattern recognition services

#### Helpers for author experience

**Examples:**

- Bots embedded in content author / marketer experience
- Intelligent/predictive search
- Query parsing and results relevance

**Where it can help:**

- Faster and assisted experience for content and marketing workflows
- Better discovery and usage of content

**Measurements:** Time to execute workflows

**Sample techniques:** Bots, NLP, predictive modelling



# 2020 CPP Fellows



**John Berndt**  
TBG (The Berndt Group)  
Founder



**Amanda Shiga**  
Sitecore  
Founder



**Mara Low**  
TBG (The Berndt Group)  
UX Fellow



**Randy Woods**  
Valtech  
Technology Fellow



**Colin Eagan**  
ICF Next  
UX Fellow



**Kevin Nichols**  
Avenue CX  
Content Fellow



**Jeffery MacIntyre**  
Bucket Studios  
Content Fellow



**Jeff Cram**  
ProKarma  
Technology Fellow



**Cruce Saunders**  
Simple [A]  
Content Fellow



**Lars Petersen**  
Altola, Inc.  
Technology Fellow

## MISSION

***Promoting ethical, evidence-based digital personalization standards since 2017.***

### OUR MISSION STATEMENT

Founded in 2017, the *Consortium of Personalization Professionals* is an invitation-only non-profit group of subject matter experts that seeks to convene expert discussion focused on the development of digital practices around targeted content and user experience. These discussions seek to contribute to the development of much needed creative approaches, methodologies, operational models, ways of evaluating success, and other aspects of personalization practice, working in a vendor neutral way through a series of in-person meetings and other forms of discussion and collaboration.

### What CPP IS

- Practitioner-focused
- Detail-driven
- Trans-platform / tech agnostic
- Moving "State-of-Practice" forward
- Realistic "in-the-trenches"
- Substantive
- Curiosity of what's next
- Multi-disciplinary
- Honest assessments

### What CPP is NOT

- Marketing-focused
- Vendor centric
- Remedial
- Fluff pieces
- Demo-focused

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