Digital Experience
Meet the Lab
DX + Watson
Customer Engagement Showcase
20. – 21. June 2017
IBM Labor Böblingen
Introduction and Business Value
- What means Real Time Personalization for Digital Experience?
- Is Personalization relevant to your Business?
- What do we want to achieve from a Business Perspective?

Concept and Solution Architecture
- Target Group specific User Segmentation
- Personalization with Segment specific Offers
- What means Real-Time Personalization?

Show Case Design
- Core Components of the Show Case Solution
- Component Interaction and Tasks to setup the Show Case
- Realtime Interaction at Render Time in the Portal
- Advanced Solution Blueprint for a Predictive DX

Live Demo: Making your Digital Experience Customer Journey Predictive
What means Real Time Personalization for Digital Experience?

Real Time Personalization for Digital Experience enables marketers to facilitate the interactive Sales Live Cycle by taking advantage of historic customer data and live data from user interaction to be able to provide real-time offers in digital Marketing Channels.
Is Real Time Personalization of Digital Experience relevant to your Business?

- 37% of business and technology decision-makers put improvement of digital sites at the top of the priority list when it comes to increasing brand research and influence.
- 75% of respondents intend to personalize more of their web content.

What do we want to achieve from a Business Perspective?

Facilitate Sales Life Cycle

**Attract**
- Via Search
- Social Networks (Likes, Recomm.)
- Links from PR and Advertising
- ..... 

**Engage**
- Likable, Trusty
- Relevant and Interesting
- Category Affinity
- News that Affect
- Deliver Awesome
- Keep in Mind

**Convert**
- Register for Services
- Complete Action
- Advocate on your behalf in social channels

**New Visitor**
- Keep Loyalty
- Lead Nurturing
- Reduce Churn rate
- Target the right offers to the right customers
- Campaign Mgmt.

**Returning User**
- Keep in Mind

**Registered User**
- Key Success Factors: Segmentation, Personalization, Target Group specific Offerings
Target Group specific User Segmentation

Known User
Authenticated User
- Profile
- Business History
- Contact History
Self Registered User
- Preferences
- Voluntary Disclosure
- Contact Information
- Social Media

Anonymous User
Behavioral Data
- Real Time Analysis
- Event Patterns
- Time-bound Patterns

1. Collect Data
- Digital analytics
  - Viewed Pages
  - Category Preference
  - Touchpoints
  - 360° View
- CRM/MDM System
  - Customer details
  - Leads, Proposals
  - Preferences
- LDAP
- Credit history
- ...

2. Analyze Patterns

3. User Segmentation

Segmentation means to cluster users into target groups or categories and all Members in a Segment are treated in the same way.
Personalization with Segment specific Offers

Smart User Segmentation

User Profile Data:
- Age
- Gender
- Address
- Job type
- Income group
- Purchased products
- Device type
- ...

Show/Hide Page or Portlet

Visibility rule

Show targeted Content

Content Targeting rule

Show right Product Offering

Product Offering rule

Smart User Segment

WCM

Content 1

Content 2

Content 3

Catalog

Product 1

Product 2

Product 3

Behavioral Data:
- Viewed Pages
- Interaction Points
- Category Preference
- Complete Action
- ...

SHOW

HIDE
What means Real-Time Personalization?

**Smart User Segmentation**
- Known User
  - Profile based User Segmentation
- Anonymous User
  - In Session - Multiple Sessions
  - Behavioral User Segmentation
- Real-time Resegmentation

**Interact**
- Management & Configuration
- Runtime
- API
- Data Providers
  - IBM Universal Behaviour Exchange

**DX Touchpoint/Channel**
- Authenticated or Anonymous
- Interaction Point 1
- Interaction Point 2
- Event Trigger
- Zone
- Real-time Personalization
- Personalized Offers
- Page/Portlet Filter
- WCM and Watson Content Hub
The top three Things to Remember

- Enables marketers to engage directly in **design, creation, and delivery** of relevant and personalized offers to real-time channels
- Can leverage **user data from any data source**, including real-time behavioral data
- Enables organizations to spend more time **understanding customers** and personalizing their user experience
Core Components of the Show Case Solution

**WebSphere Portal**
- Portal UI, Navigation
- Profile based Personalization
- Real-Time Personalization
- Target Group specific Behaviour
- Multidevice

**IBM WCM**
- Web Content Management
- Content Store & Digital Assets
- Authoring System
- Approval Workflow
- Content Publication

**IBM Interact**
- Smart Segments and Rules
- Profile Table
- Real-Time Decisioning
- Personalized Offers
- Runtime API

**User Profile Data**
**Enriched User Data**
**WCM Content Repository**

On IBM Cloud
Component Interaction and Tasks to setup the Show Case

**Design Time**

**Marketing Person**
- Interact
  - Define Campaign
  - Define Channel
  - Define Zones and Interaction Points
  - Define Events and Event Patterns, Create eligible Segments
  - Create Interactive Flowchart for smart Segmentation Rules
  - Define Strategy and map Segments and Offers to Zones

**Web Author**
- Channel: Digital Bank Portal
  - Create Portal Structure and Pages
  - Configure Content Spots for personalized Offers and map to interactive Channels
  - Add Interact Events
  - Create Web Content
  - Create Content Elements for Offers

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**Render Time (Realtime)**
Realtime Interaction at Render Time in the Portal

**Anonymous or Authenticated User**

**Channel: Digital Bank Portal**
- User requests Portal Page With realtime Personalization
- User navigates through Content and triggers Events
- Events are sent to Interact
- Content Spot requests Offers from Interact and fetches proper content from WCM
- Content Spot shows smart-segmented Offers

**Render Time (Realtime)**

**Realtime Personalization Service**
- Interact
- Create Log Records for Events in Visitor History
- Get Profile and provide Resegmentation according to Events in Visitor History (Smart Segmentation)
- Provide Offer IDs based on Smart Segmentation Results

**Create Log Records for Events in Visitor History**
**Get Profile and provide Resegmentation according to Events in Visitor History (Smart Segmentation)**
**Provide Offer IDs based on Smart Segmentation Results**
Advanced Solution Blueprint for a Predictive DX

IBM Analytics
- IBM Digital Analytics (former Coremetrics)
- Predictive Analysis (SPSS)
- Watson Marketing and Commerce
- Unstructured Data Analysis (Big Data)

IBM Interact

WebSphere Portal

IBM WCM

IBM Campaign
- Outbound Marketing
- Campaign Management
- Offer Assignment

IBM Marketing Cloud
- Sales, Leads
- Outbound Channels
- Mail/Newsletter/App Push
- People and Process Management
Live Demo

Making your Digital Experience Customer Journey Predictive with

- DX
- IBM Interact
- Watson Campaign Automation
Thank you!

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