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TRUTH IN **DATA**
PROOF IN **PERFORMANCE**

Building the Empathy machine

Personalization

- As a business **strategy** or **vision**
- Enabled by **Learning from data**
- Performed using **Artificial intelligence**
- **Always-on**, ideally
- Delivers optimal **message** **or** **experiences** at every **moment**
- Focuses on the individual **customer**

Agenda

- Machine Learning and AI's role in driving marketing outcomes
- The problem is also the solution
- 3 keys to break down the wall

Artificial Intelligence

- Any technique that enables computers to mimic human processing

Machine Learning

- Ability to learn without programming
- Models that use audience and content data

Deep Learning

- Mimic human thought-process Ability to train itself to perform human-like processing, by accessing vast amounts of data
- Can use artificial neural networks
- Cognitive processing

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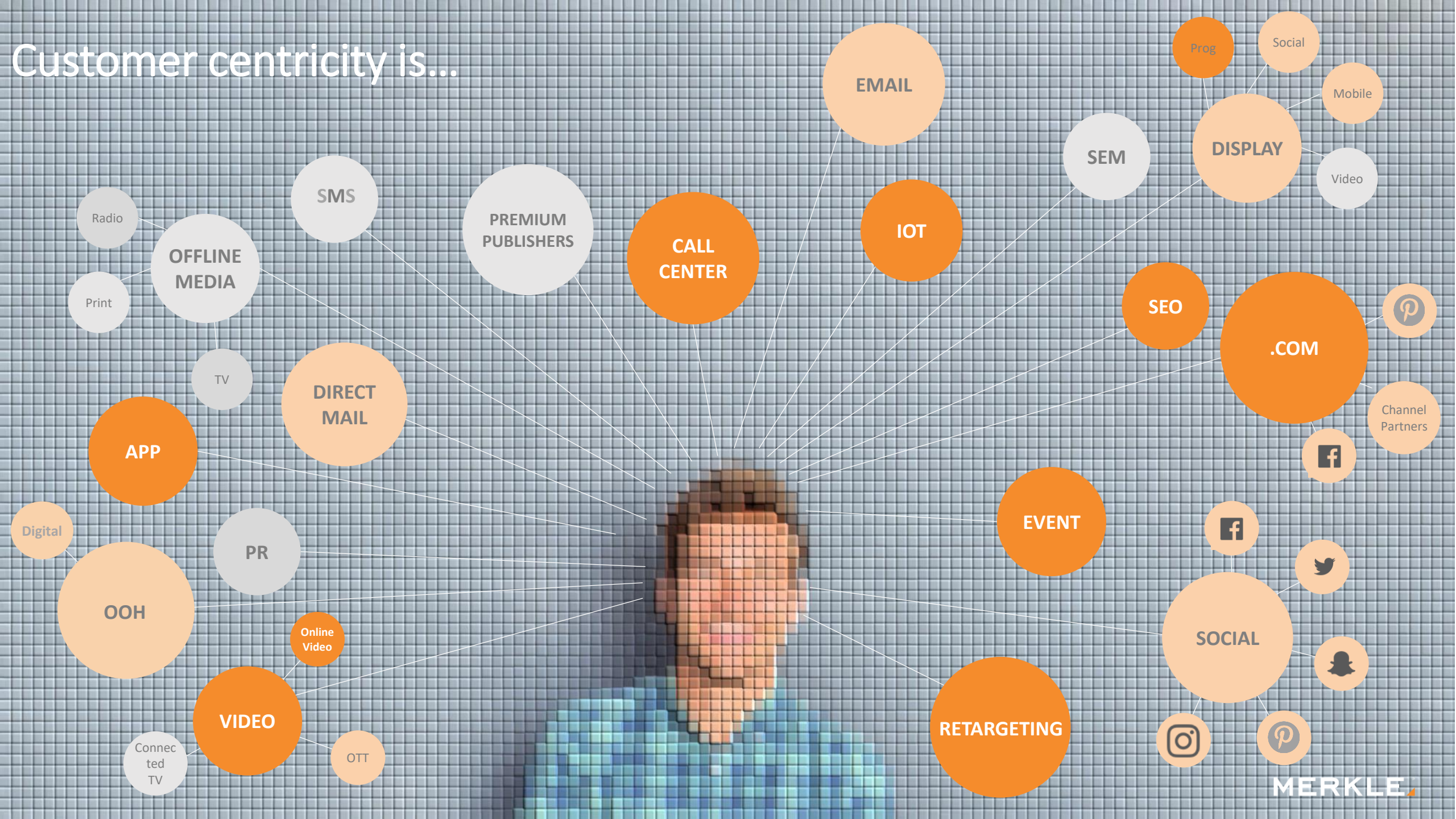
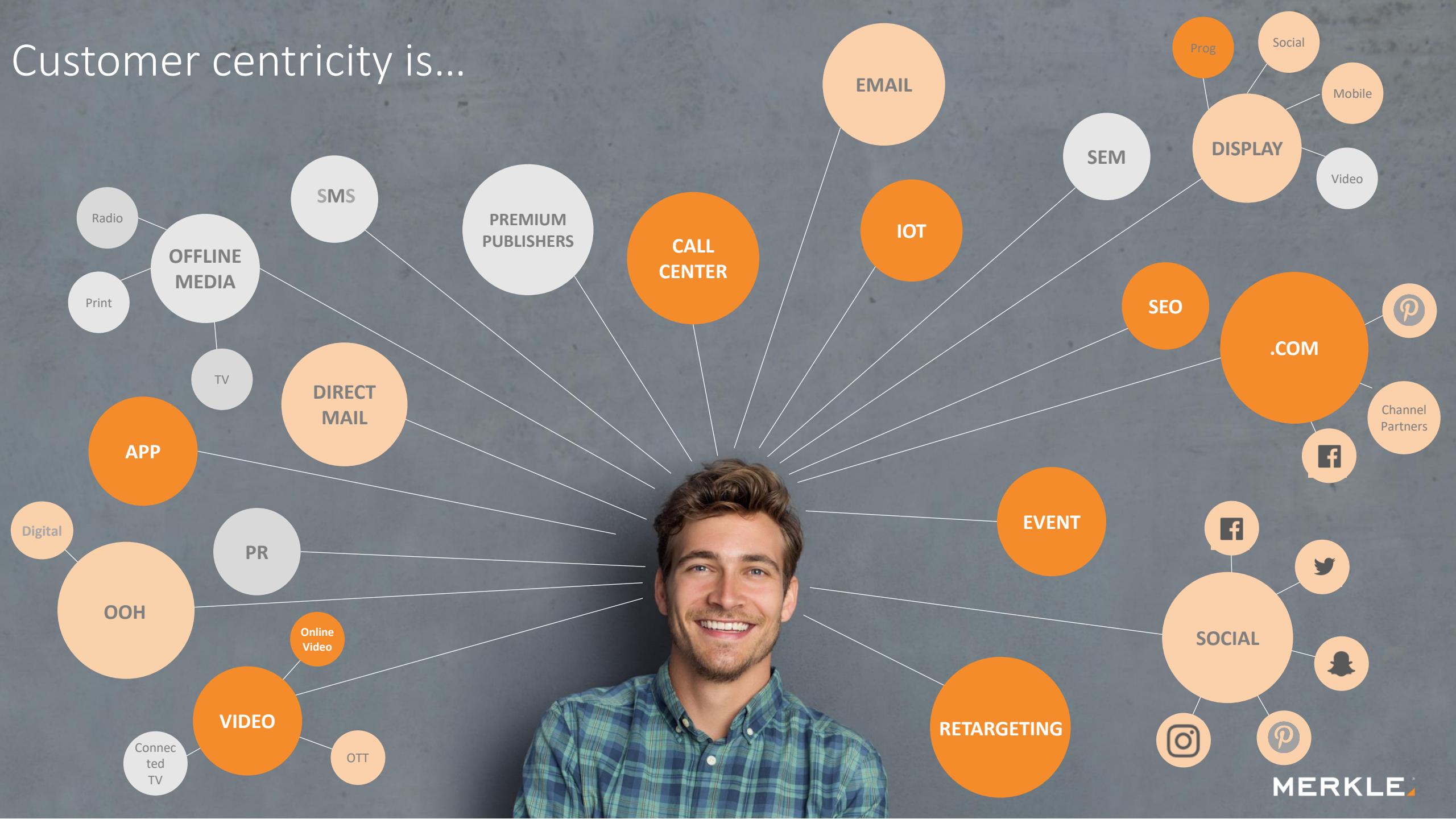
Customer centricity is…



Customer centricity is…



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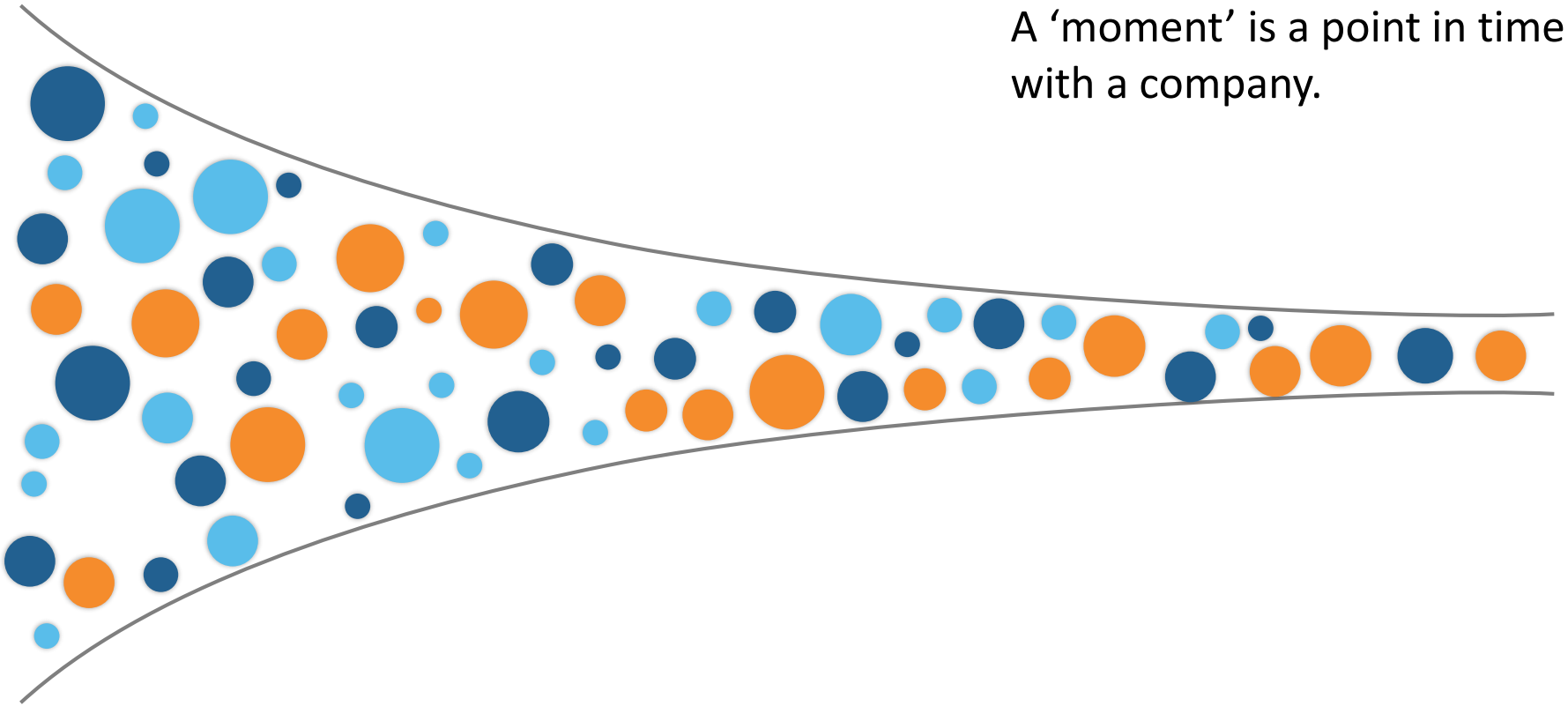
Knowing the Moments



A ‘moment’ is a point in time when consumer engages with a company.

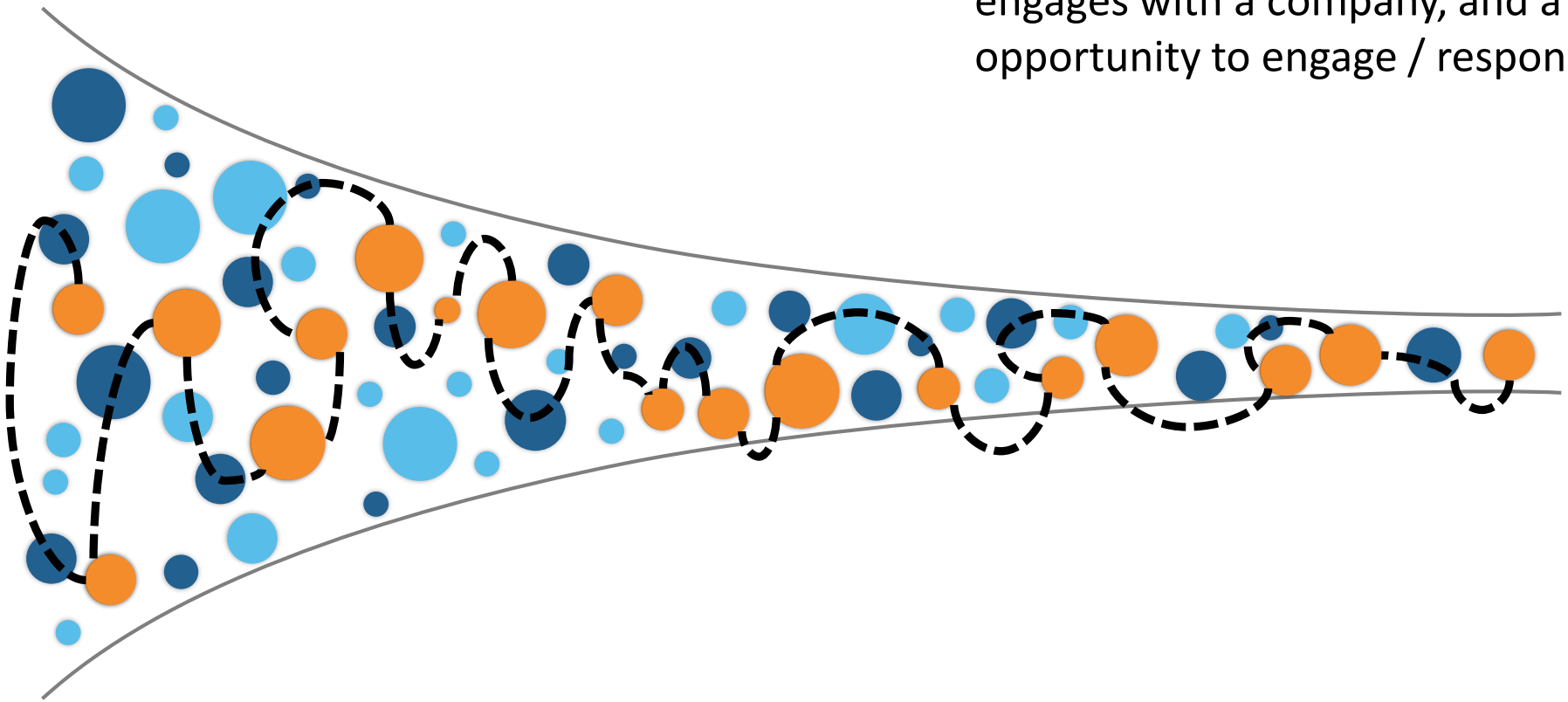
UNKNOWN / UNMANAGED

KNOWN / UNMANAGED

KNOWN / MANAGED

Owning those Known / Manageable Moments

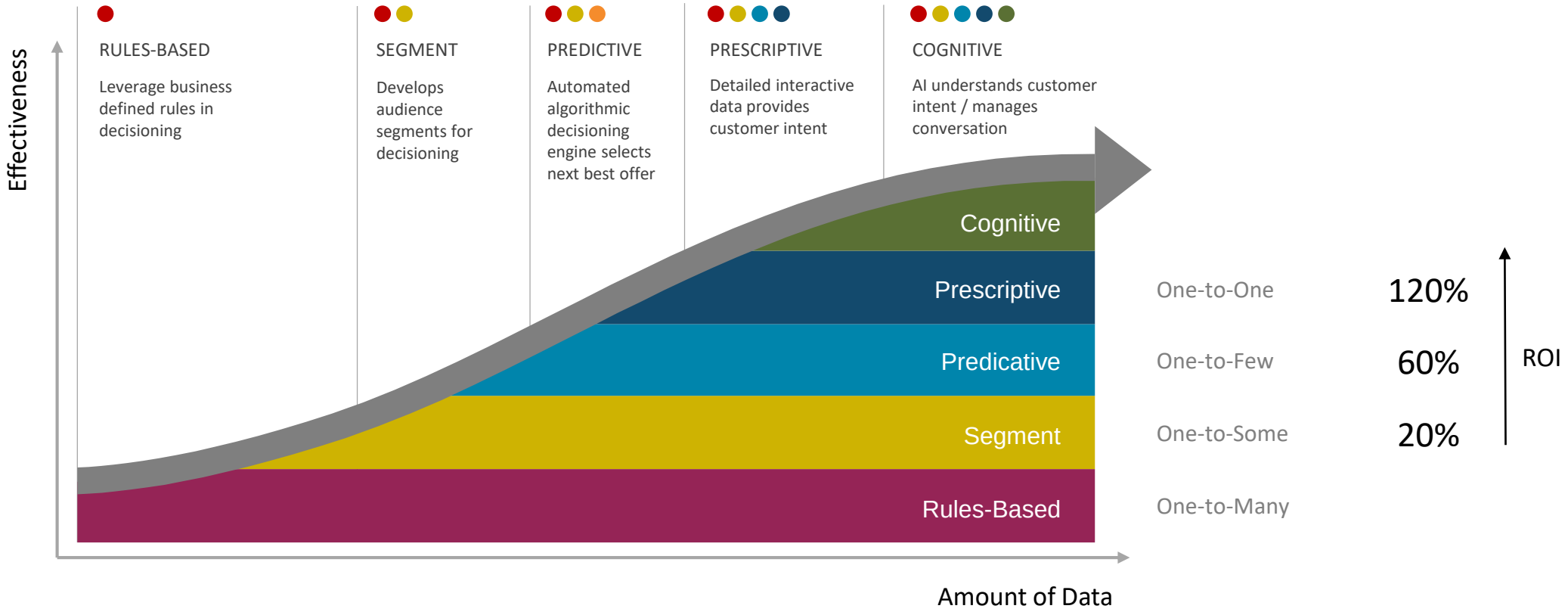
An ‘owned moment’ is a point in time when consumer engages with a company, and a company has the opportunity to engage / respond to the interaction



UNKNOWN / UNMANAGED

KNOWN / UNMANAGED

KNOWN / MANAGED


Effectiveness
RULES-BASED
Leverage business defined rules in decisioning
SEGMENT
Develops audience segments for decisioning
PREDICTIVE
Automated algorithmic decisioning engine selects next best offer
PRESCRIPTIVE
Detailed interactive data provides customer intent
COGNITIVE
AI understands customer intent / manages conversation
Cognitive
Prescriptive
Predicative
Segment
Rules-Based
Amount of Data
One-to-One
One-to-Few
One-to-Some
One-to-Many
120%
60%
20%
ROI

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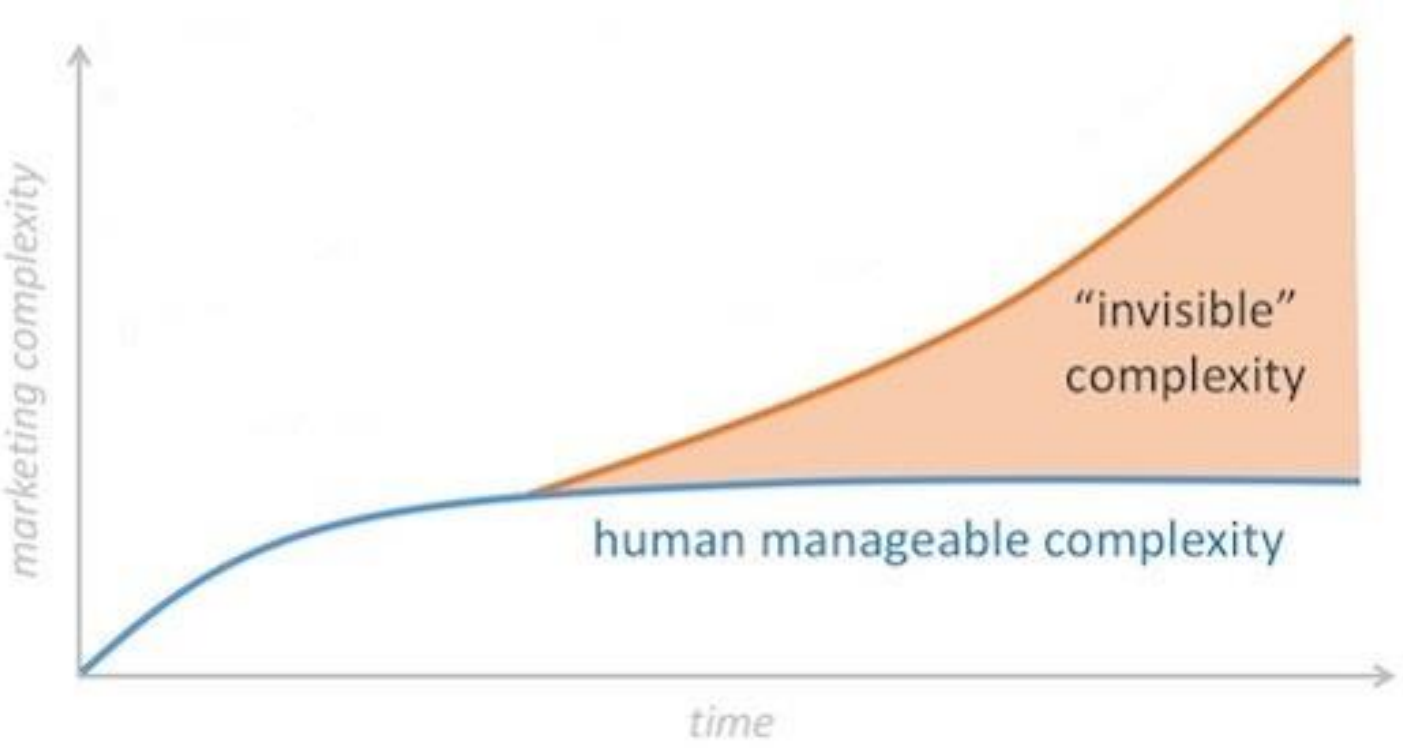

One-to-One	120%
One-to-Few	60%
One-to-Some	20%
One-to-Many	

ROI

ChiefMartech.com

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AI and the Marketing Industry

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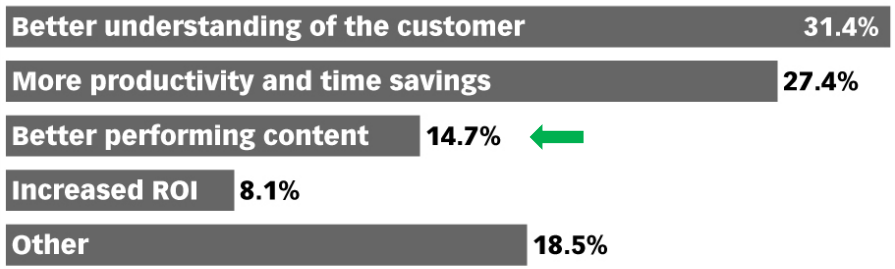
Produced by Scott Brinker (@chiefmartec), Anand Thaker (@AnandThaker), and Blue Green Brands.

Personalization is everyone's job

Understanding and Delivering

Primary Advantage of Using Artificial Intelligence at Their Company According to Marketers Worldwide, Feb 2018

% of respondents

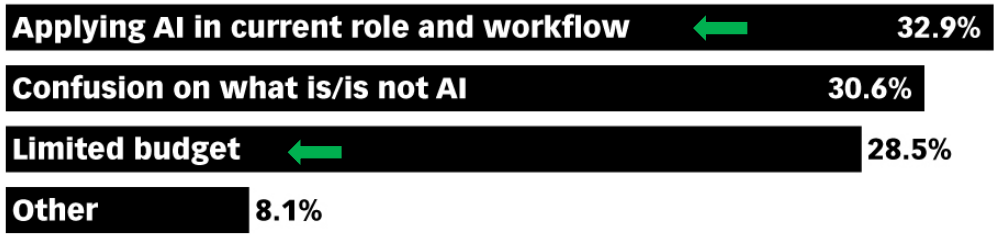


Note: numbers may not add up to 100% due to rounding
Source: BrightEdge Research, "2018 Future of Marketing and AI Survey," March 12, 2018

236778 www.eMarketer.com

Biggest Obstacle with Integrating Artificial Intelligence (AI) at Their Company According to Marketers Worldwide, Feb 2018

% of respondents



Note: numbers may not add up to 100% due to rounding
Source: BrightEdge Research, "2018 Future of Marketing and AI Survey," March 12, 2018

236779 www.eMarketer.com

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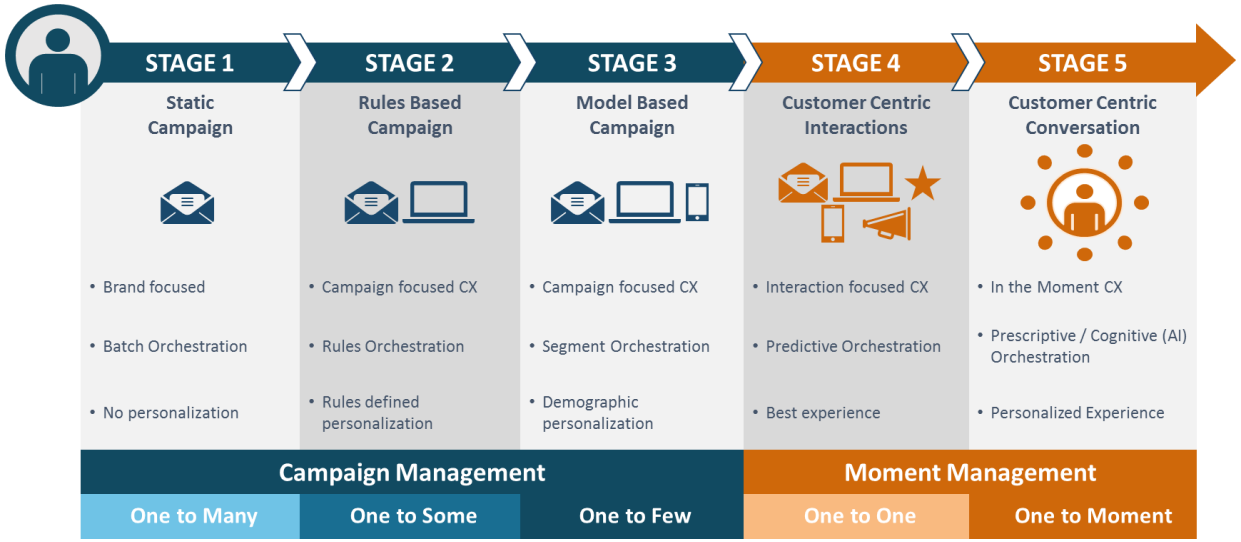
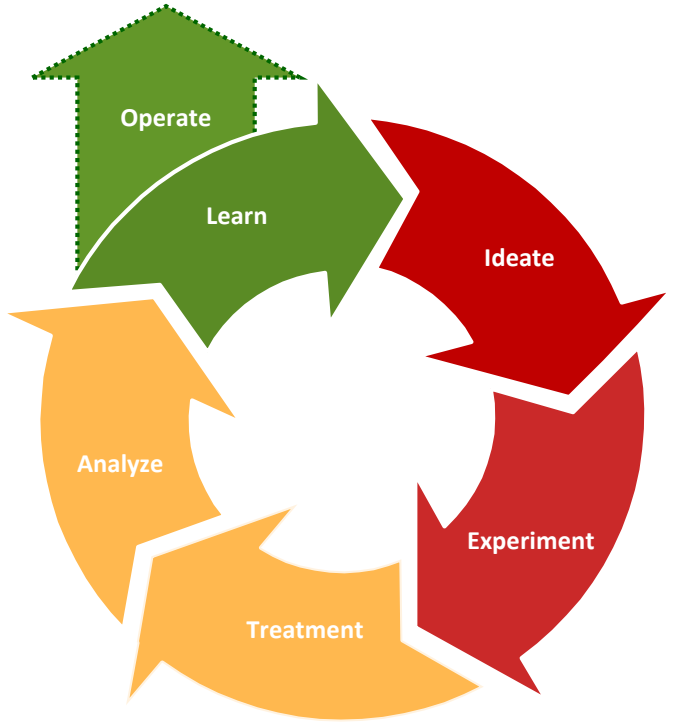
We need to practice agility



Building up our Omni-channel maturity



Practicing consistent test and learn

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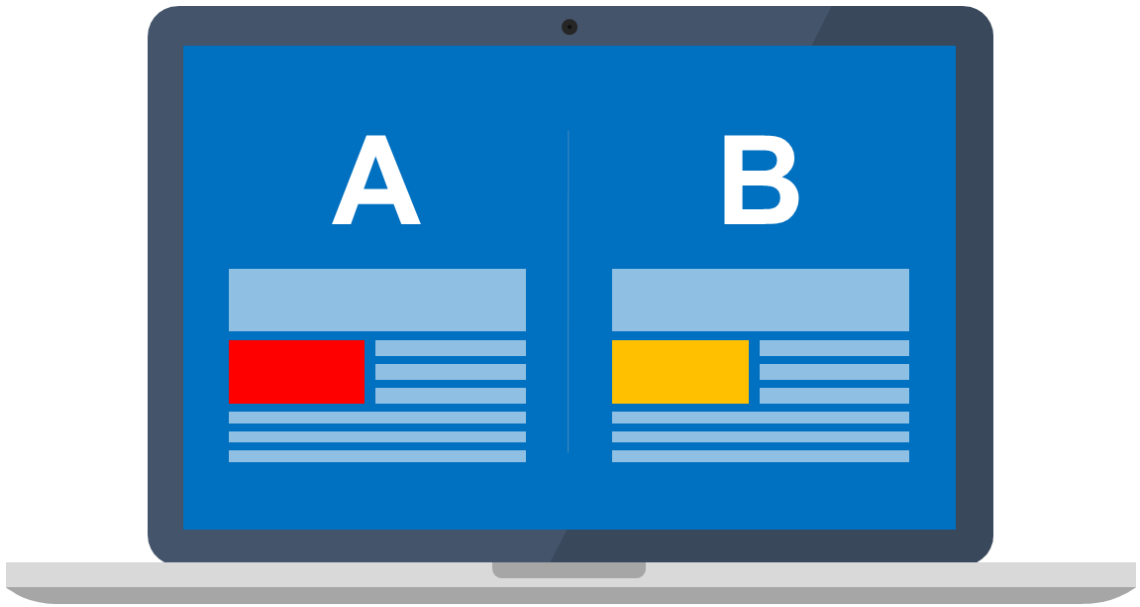
Optimization Impact



INDUSTRY:
Life Insurance Company

CHALLENGE:
Develop responsive landing page to support paid media channels

15%
LIFT IN CONVERSION ON ALL PRODUCTS

98%
INCREASE IN CUSTOMER ENGAGEMENT

62%
REDUCTION IN MOBILE BOUNCE RATES

INDUSTRY:
Major Financial Company

CHALLENGE:
Develop a testing program aligning to business growth and personalization.

10.3%
SINGLE TEST: LIFT IN DESKTOP ECC

5.85%
SINGLE TEST: LIFT IN DESKTOP ACR

177
SINGLE TEST: INCREMENTAL ACCOUNT OPENS

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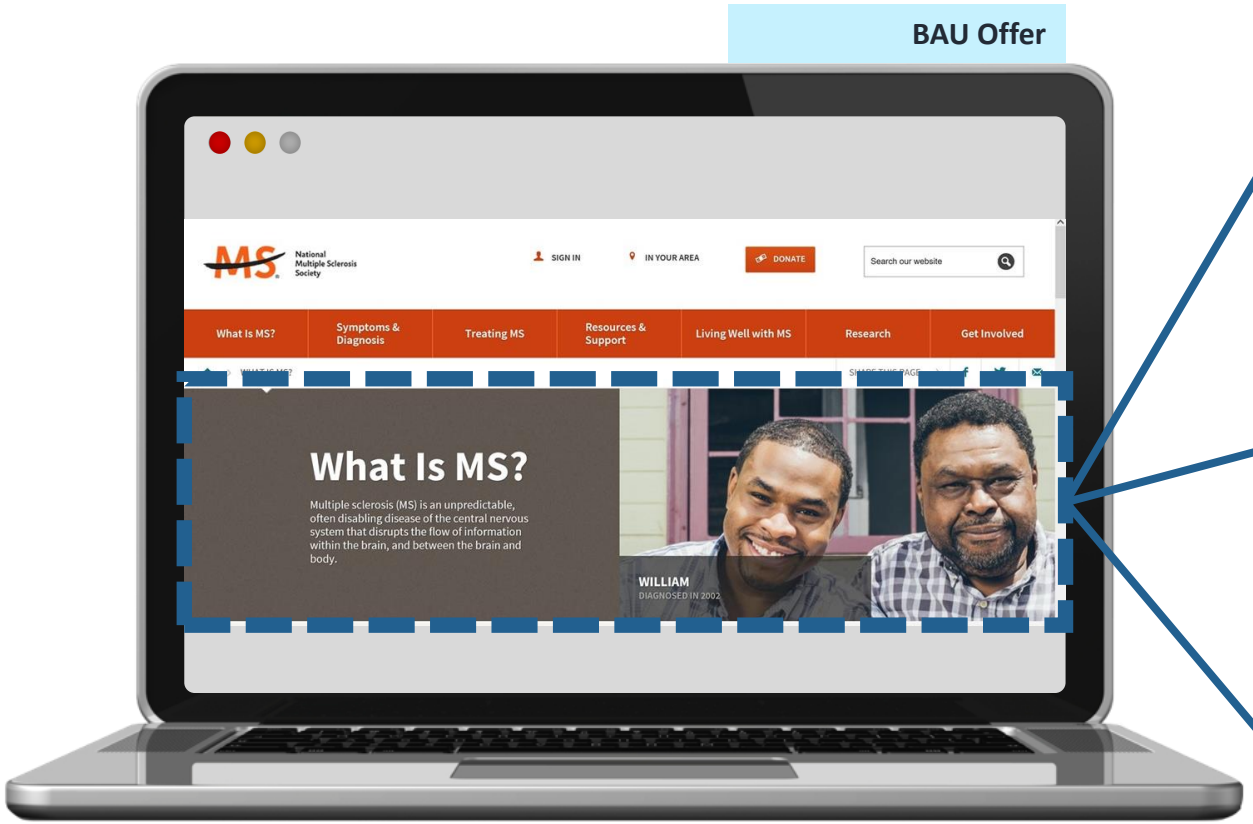
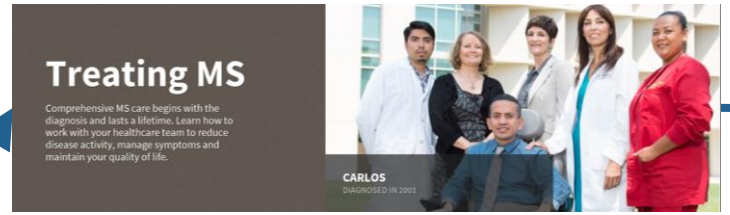
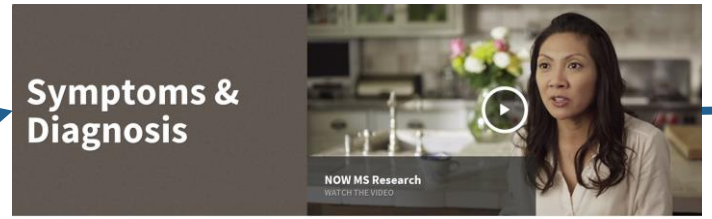
Changing the narrative

Often, we envision this:





Audience A	3%
Audience B	1%
Audience C	**9%**
Audience D	3%



Audience A	**6%**
Audience B	1%
Audience C	4%
Audience D	3%

Audience A	3%
Audience B	1%
Audience C	7%
Audience D	**15%**

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TIP N 1

PERSONALIZATION IS EASY

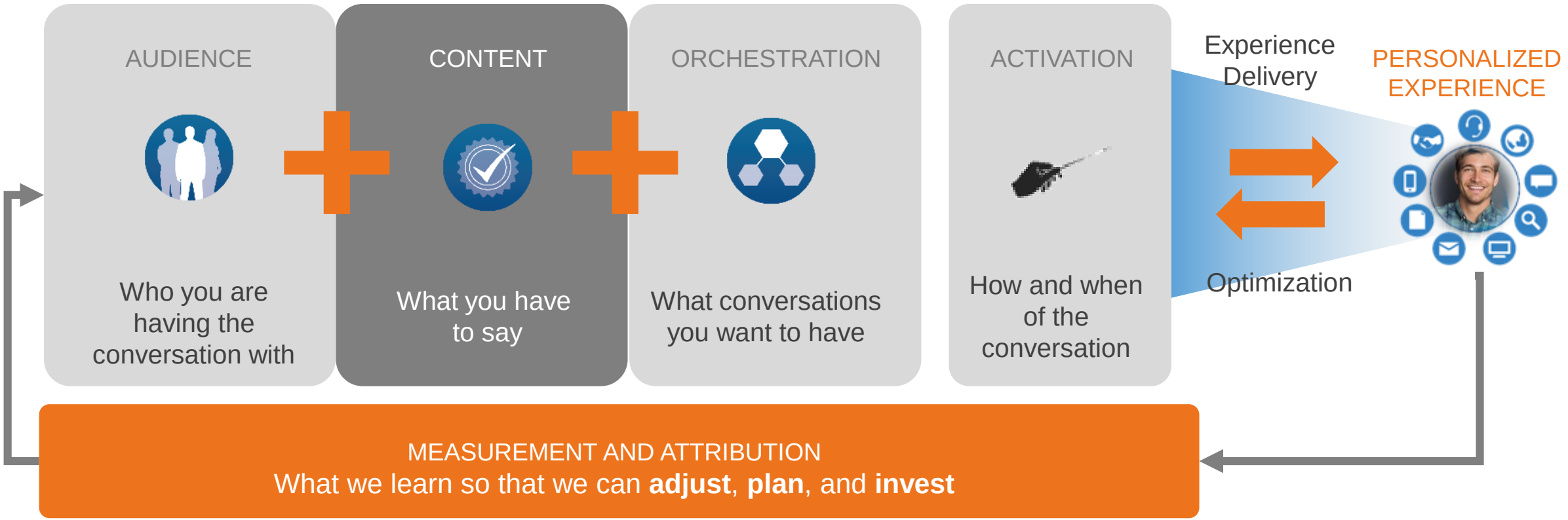
But it's the

to create

CREATIVE

THAT IS HARD

Formula for Personal Experiences



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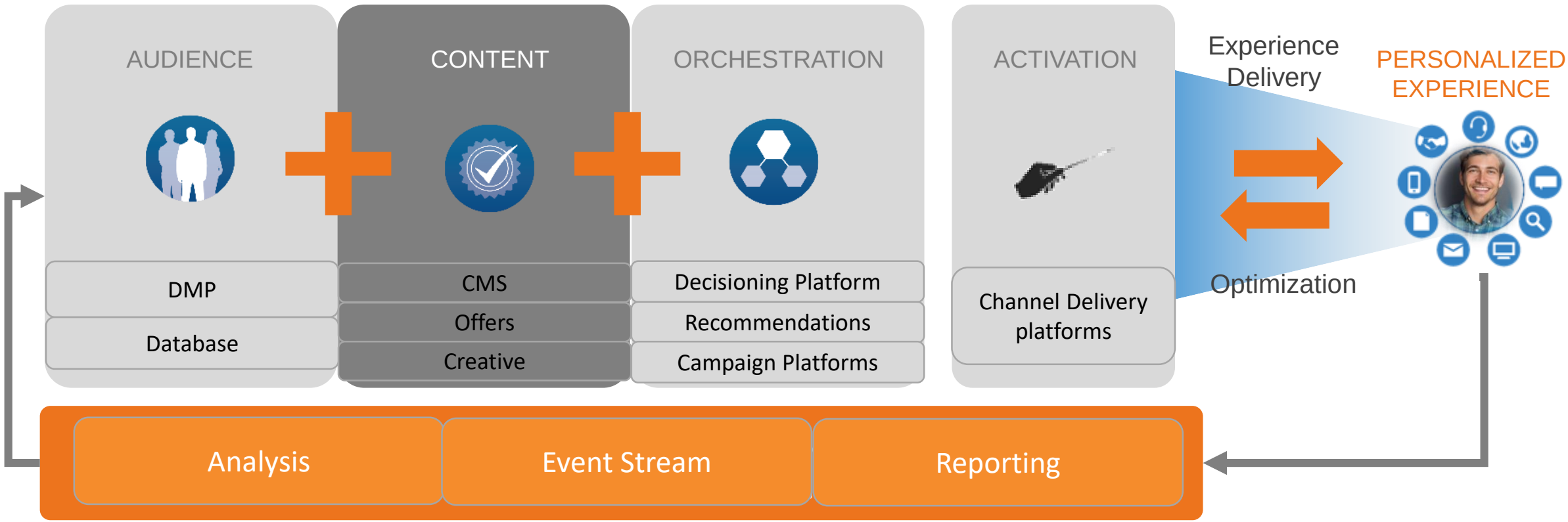
Formula for Personal Experiences



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Align your tools in the right way to deliver

Activation

- Launch and optimize addressable campaigns across channels through seamless integration with DSPs, search, site personalization, email, social, and publisher platforms

Orchestration

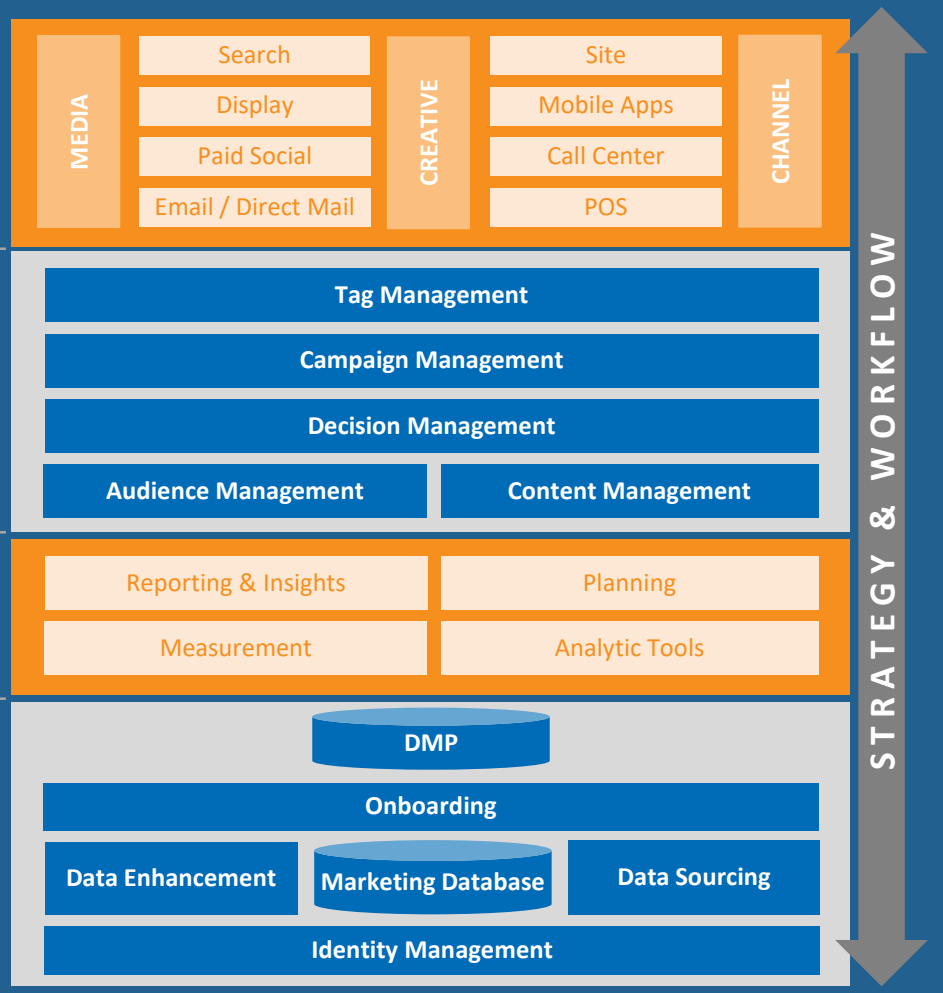
- Enable marketers to personalize and orchestrate people-based audiences across media and channels
- Facilitate identification of the best technology and media platforms to execute campaigns

Insights

- Facilitate deep exploration/segmentation
- Provide both historical (reporting and attribution) and forward-looking (scenario planning) insights

Data Management

- Enhance marketers' first-party data by hundreds of second- and third-party data sources
- Synthesize customer and prospect data across media and channels into a single view of audiences



Partner Technology

sitecore
Adobe
Optimizely
salesforce
Google
tableau
Pega
ORACLE
IBM

Proprietary Technology

M1 ID
Connected Recognition
Data Bridge
Merkle Search
LoyaltyPlus

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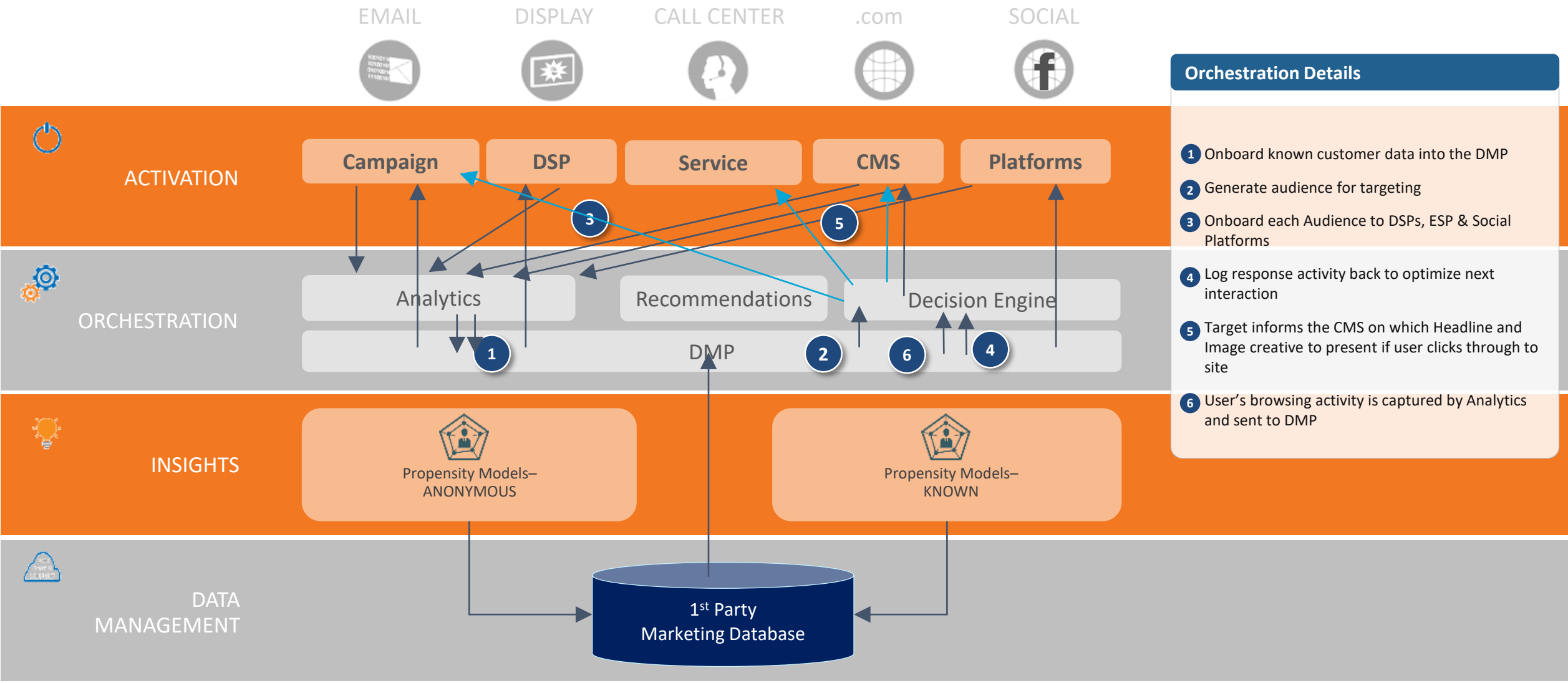
Plotting the effective toolsets



Orchestration Details

1. Onboard known customer data into the DMP
2. Generate audience for targeting
3. Onboard each Audience to DSPs, ESP & Social Platforms
4. Log response activity back to optimize next interaction
5. Target informs the CMS on which Headline and Image creative to present if user clicks through to site
6. User's browsing activity is captured by Analytics and sent to DMP

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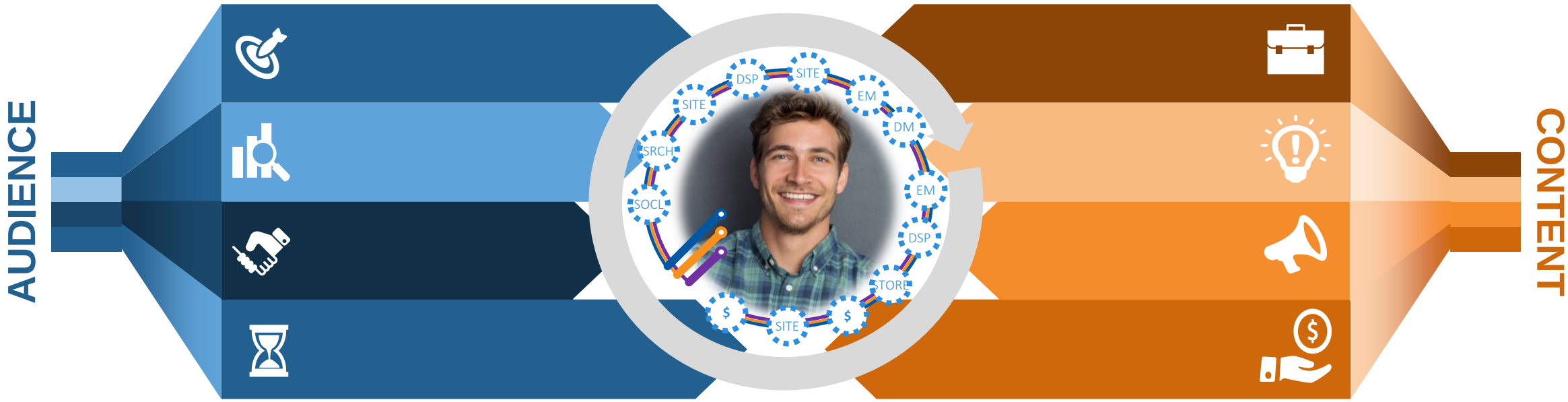
The crucial mindset change



How can we inspire Brand Storytellers to think about
Audience and Content

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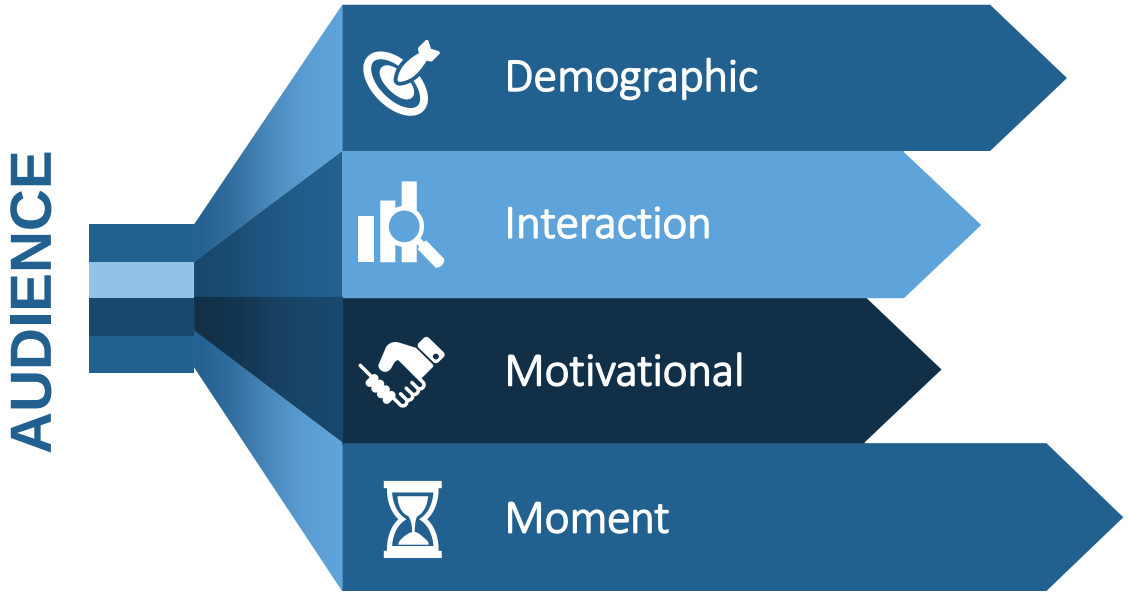
Audience Data



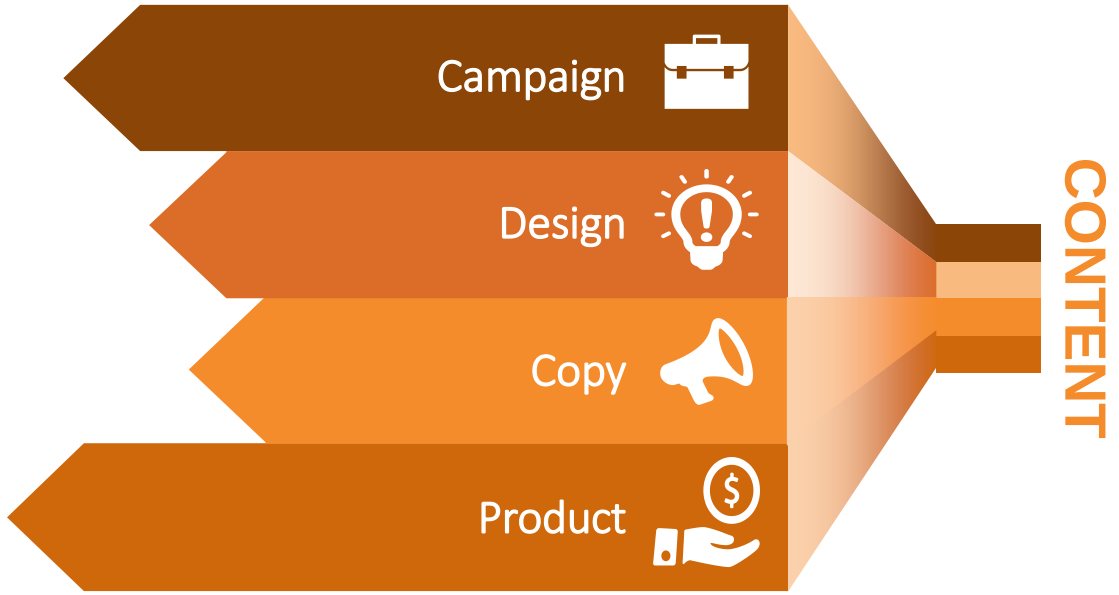
The ability to parse descriptions of your audience, recognize their interactions

The ability to assign data about motivation of your audience and their personal context with you

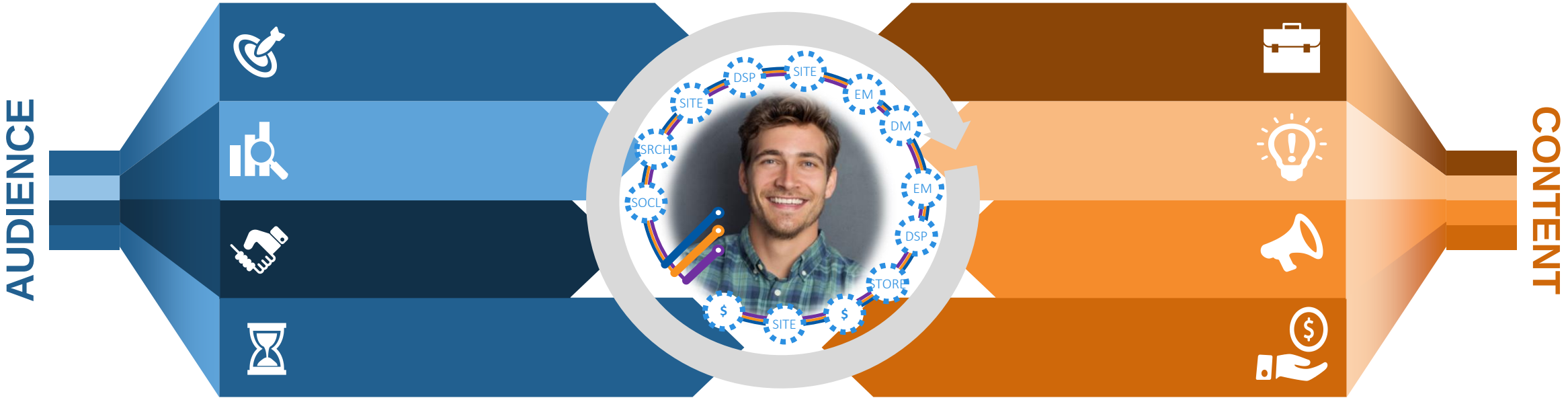
Content Data

The Message you are trying to send

The Treatment of content in a "moment" – How it appears, the words and visuals used, the product and offer included



Personalization requires us to effectively connect audience data to content data



Aligning the audience to content machine can properly manage the journey.

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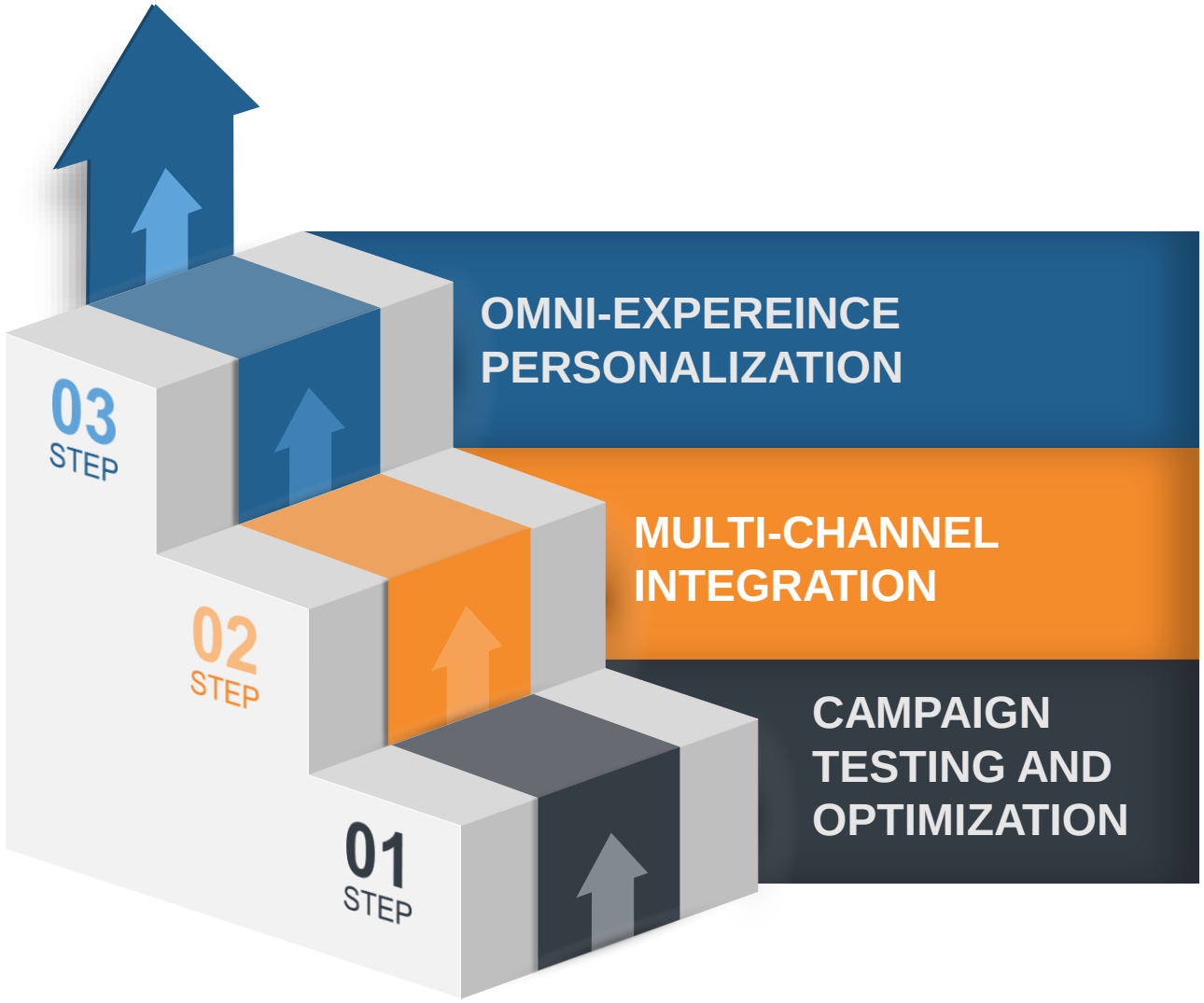
3 Steps to AI Scale



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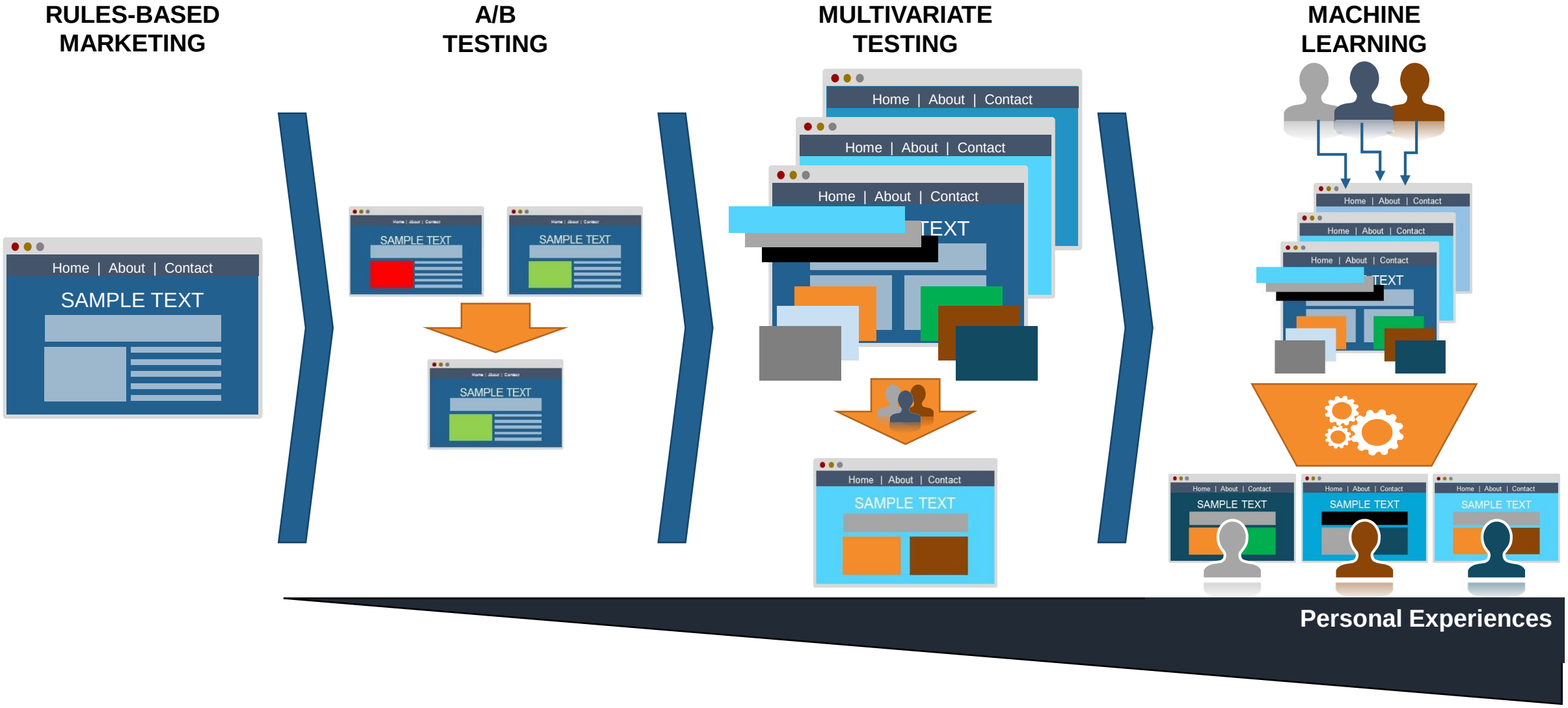
A progression toward Personal Experiences



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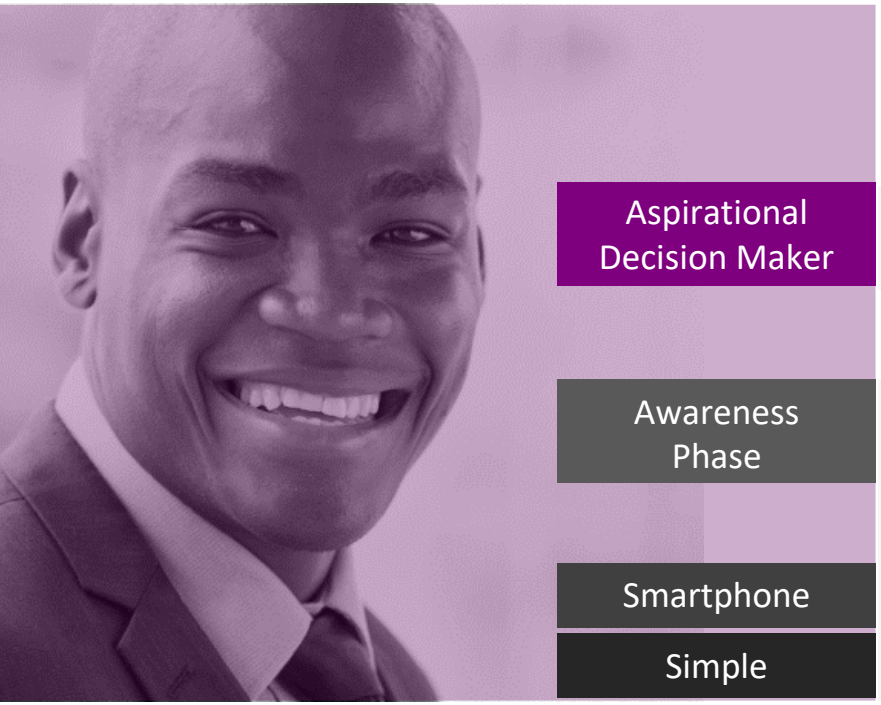
TIP N 2

TEACH CREATIVES THE DIFFERENCES YOU UNCOVER AND CELEBRATE THEM

Personas

Multiple Situations



Aspirational Decision Maker

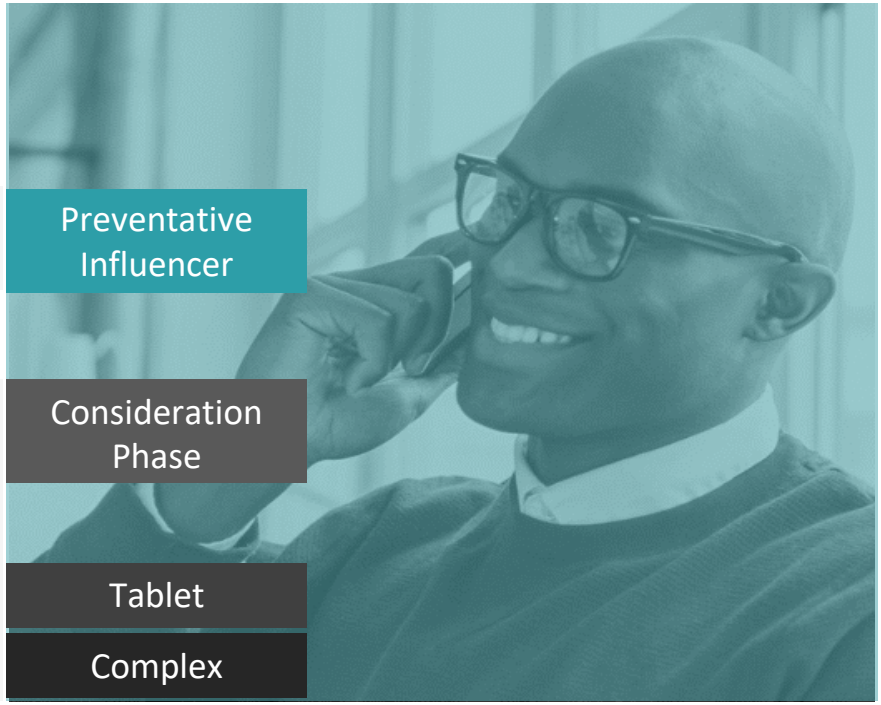
Awareness Phase

Smartphone

Simple

PERSONA & ROLE

THE OCCASION



Preventative Influencer

Consideration Phase

Tablet

Complex

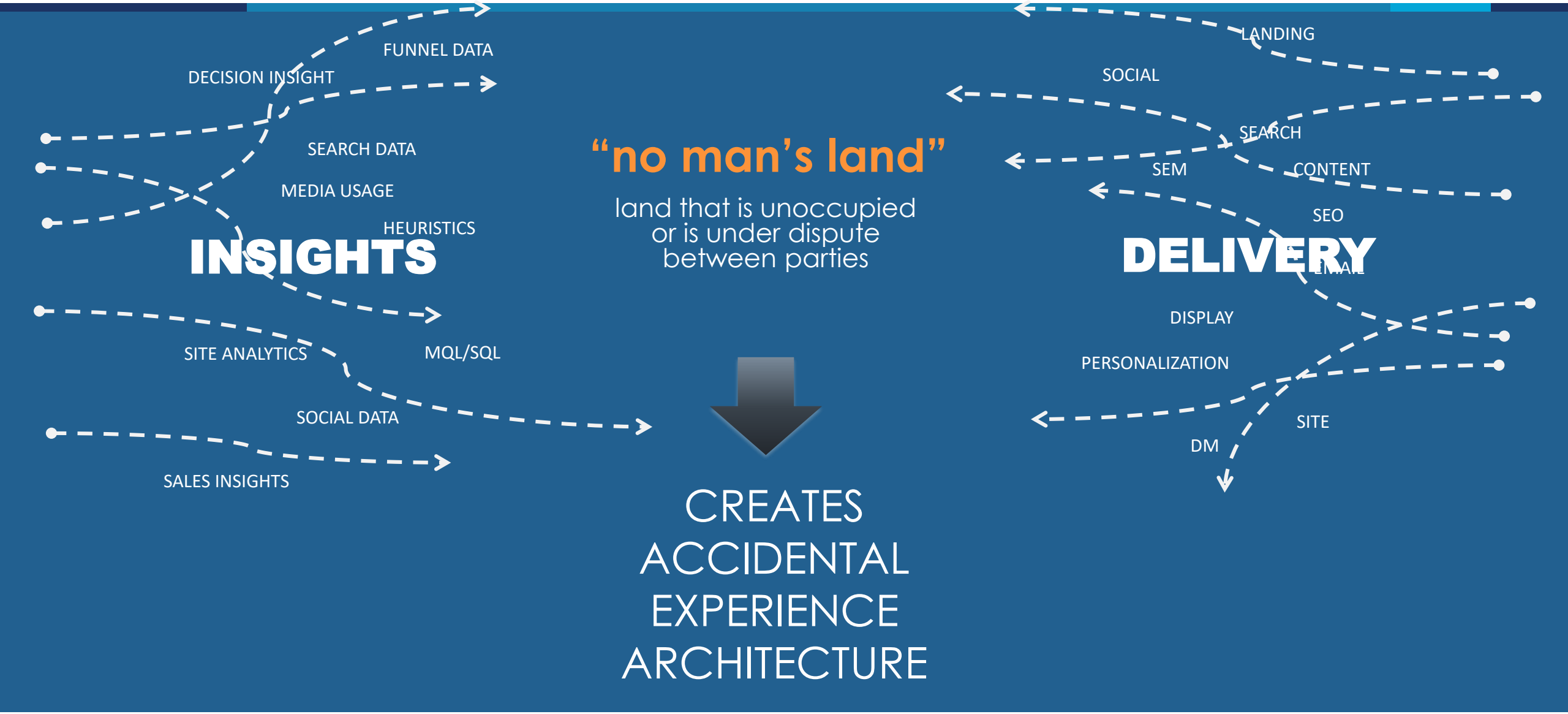
Common Ground

Overall positioning, functionality, media & channel priority, content & asset prioritization, offer & incentive

TIP N 3

KNOW WHAT YOUR CUSTOMERS DO SO CREATIVE CAN IMAGINE WHAT IS POSSIBBLE

Transition point from Low Maturity to Mid Maturity – erasing Accidental Experiences



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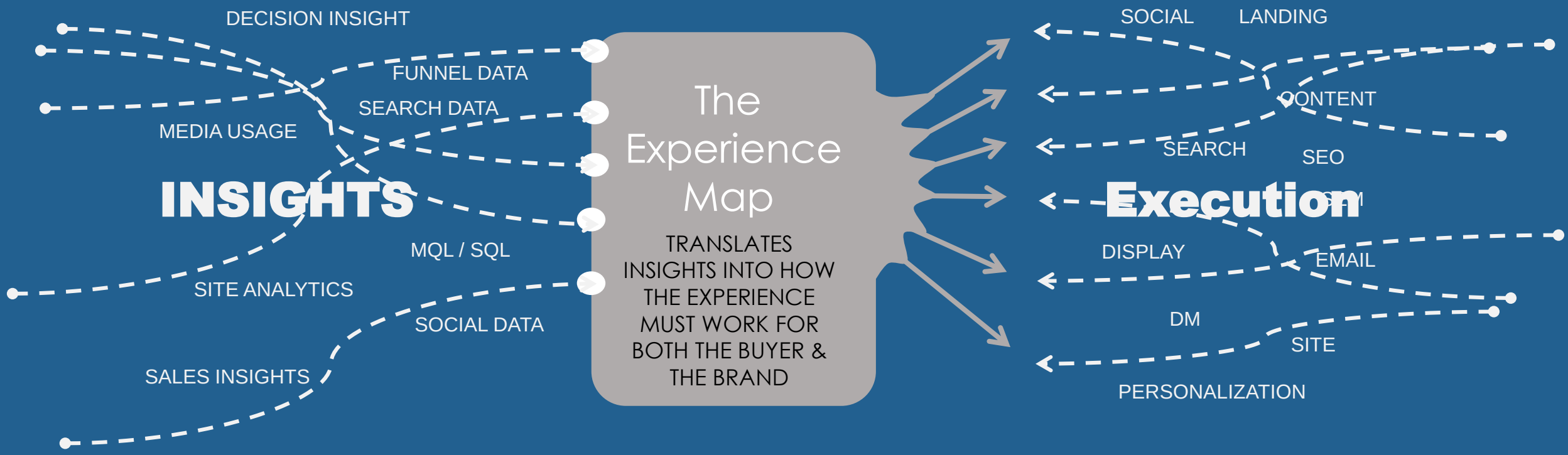
Our new Treasure map



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A Marketing machine evolution

insights

PERSONAS

strategy

JOURNEYS

activation

PLAYBOOKS

optimization

DEPLOY & LEARN

Inspiration → Execution

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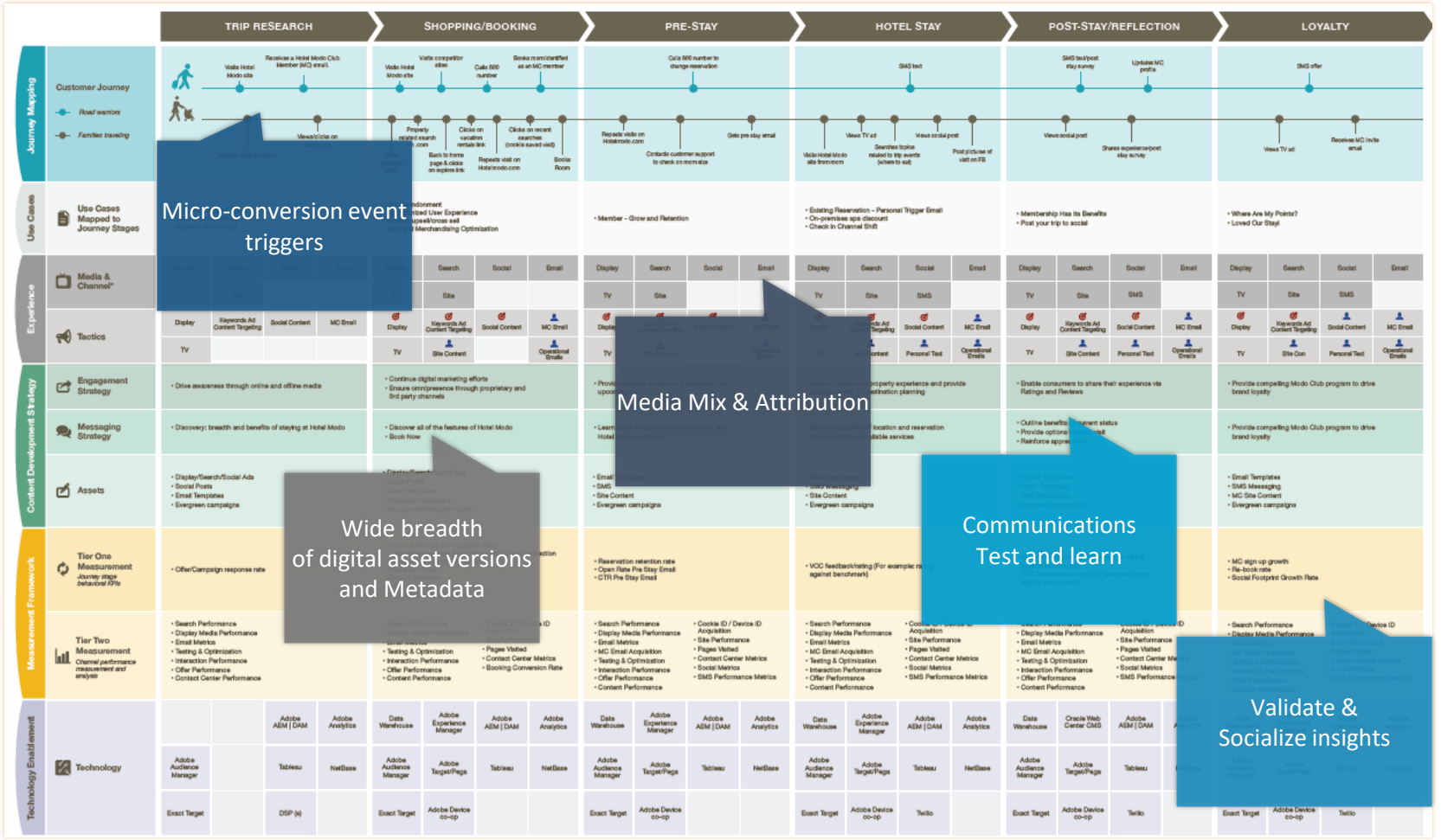
Mapping more than a “journey”



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TIP N 1

When you can deliver and measure

Granular Content

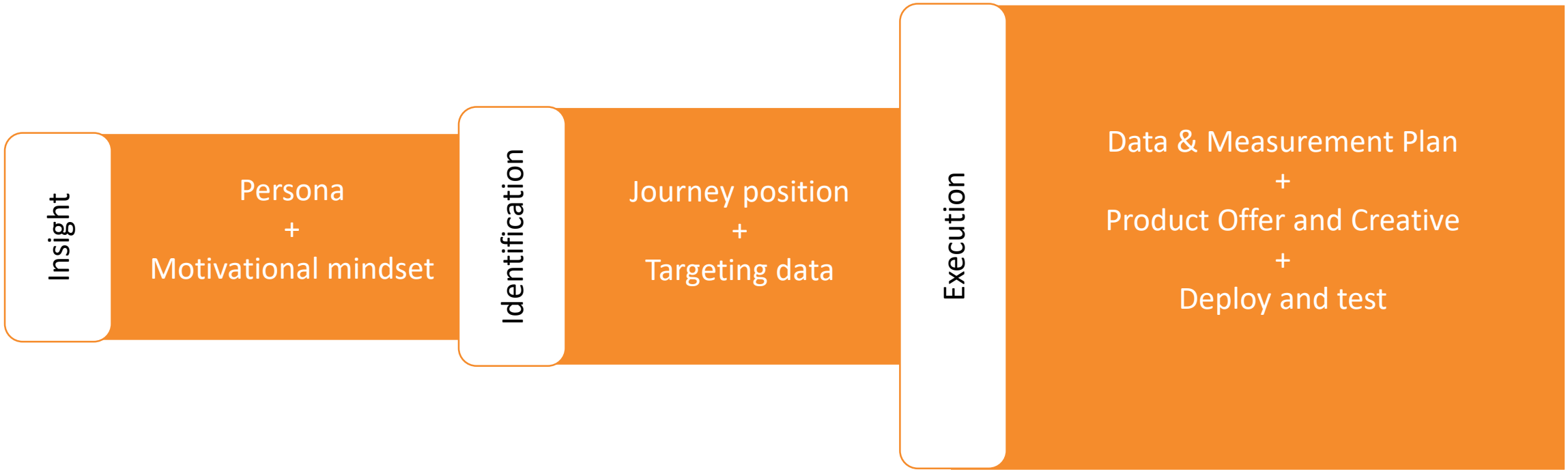
INSPIRE THEM

to create

GRANULAR IDEAS

THAT FEED THE EMPATHY MACHINE

Maturity mid-point: Audience based personalization in Insurance



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In Summary

TIP N 2

TEACH CREATIVES THE DIFFERENCES YOU UNCOVER AND CELEBRATE THEM

In Practice

	Aspirational Decision Maker	Preventative Influencer
HEADLINE	Hear why the Galaxy Tab S is "the first tablet that's really serious about enterprise"	Learn how the Galaxy Tab S is "making jobs easier" across industries
CONTENT MODULE	**IT experts discover how Samsung tablets can help optimize productivity** The Samsung Galaxy Tab® S series is proving real employees can work in new ways with a highly versatile tablet that offers enterprise-level processing. Imagine what these innovative devices could do for your business. **Read the proof** › Report: Samsung Galaxy Tab® S Optimizes Productivity in the Enterprise	**IT experts are relying on the power and flexibility of Samsung tablets to excel** The Galaxy Tab® S series is proving across industries that real employees can tackle challenges and streamline productivity with a lightweight tablet that delivers enterprise-grade processing power. See how it can help bring confidence and ease to your business. **Read the proof** › Report: Samsung Galaxy Tab® S Optimizes Productivity in the Enterprise

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TIP N 3

KNOW WHAT YOUR CUSTOMERS DO SO CREATIVE CAN IMAGINE WHAT IS POSSIBBLE

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DEPLOY & LEARN

Inspiration → Execution

MERKLE

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When you can deliver and measure

Granular Content

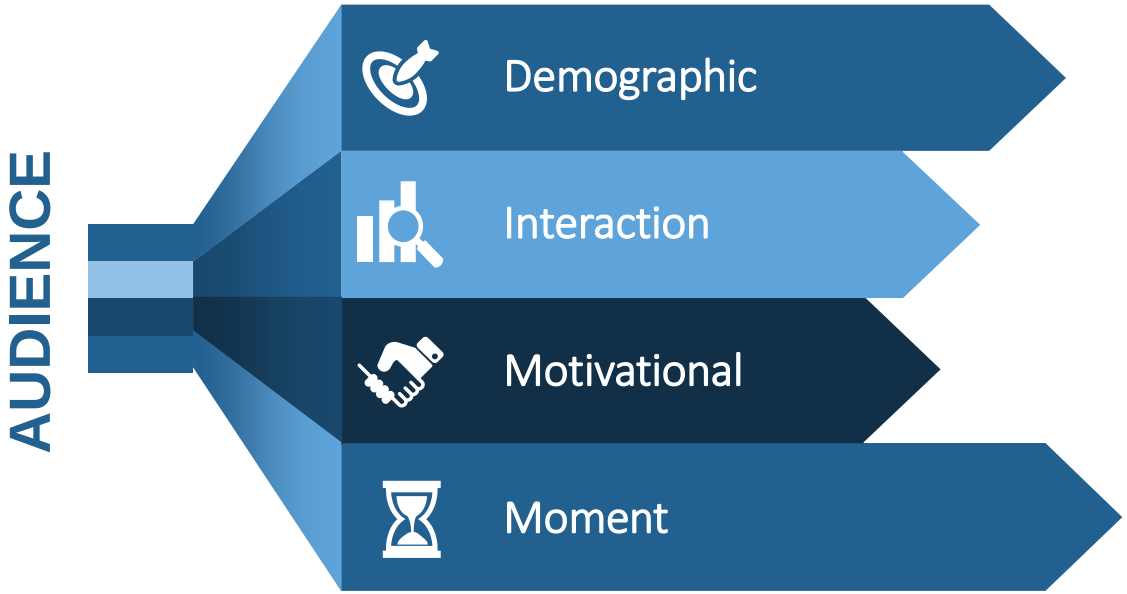
INSPIRE THEM

to create

GRANULAR IDEAS

THAT FEED THE EMPATHY MACHINE

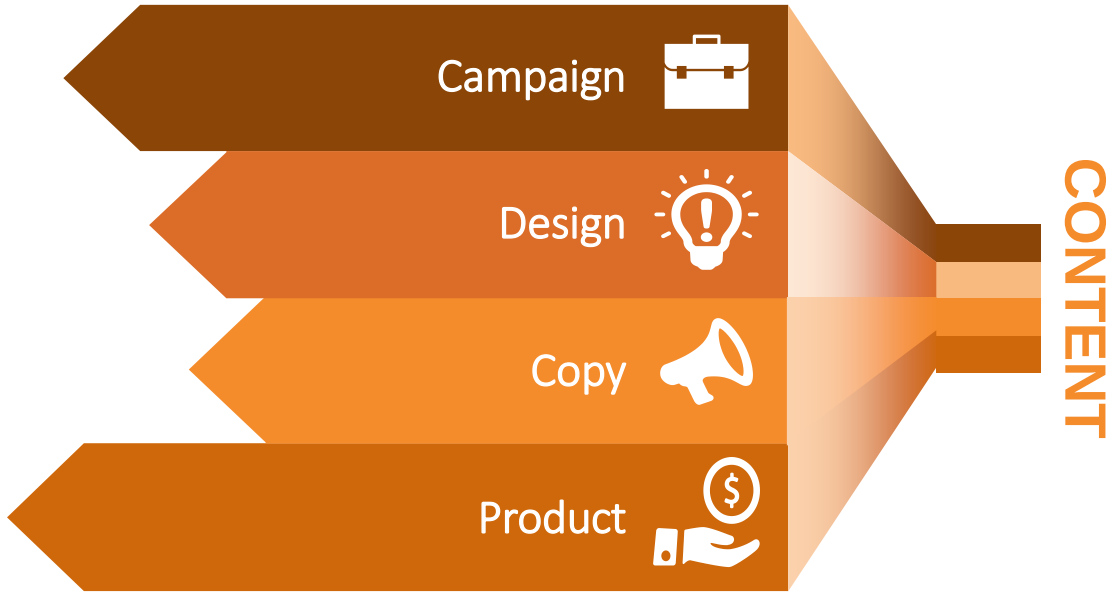
Audience Data



The ability to parse descriptions of your audience, recognize their interactions

The ability to assign data about motivation of your audience and their personal context with you

Content Data

The Marketing campaign Content, channel agnostic

The Treatment of content in a "moment" – How it appears, the words and visuals used, the product and offer included