



# The Art & Science Behind Personalization & Journey Optimization

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# Agenda

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1. **Introduction**
2. **The Foundation for Personalization**
3. **Crafting a Data-Driven Experience**
4. **Future State: Integrations**
5. **Envisioning the Art of the Possible**

# 01

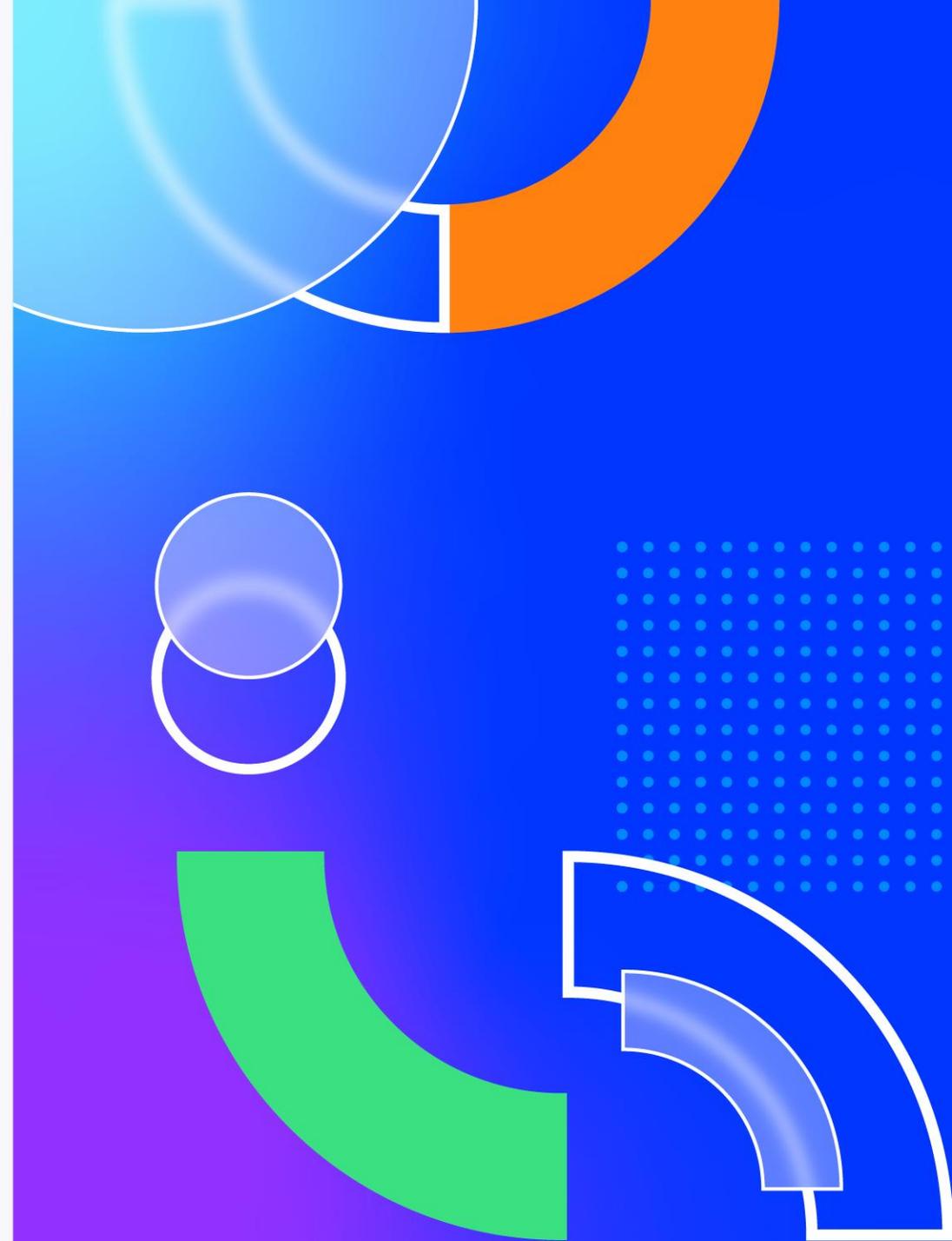
Introduction

## **Johnson Financial Group & Verndale Partnership**



# About Us

- Largest privately held financial institution in Wisconsin
- Banking and wealth for personal, business, and commercial & institutional
- Firmly rooted in our communities for more than 50 years





# Optimizely Premier Platinum Partner

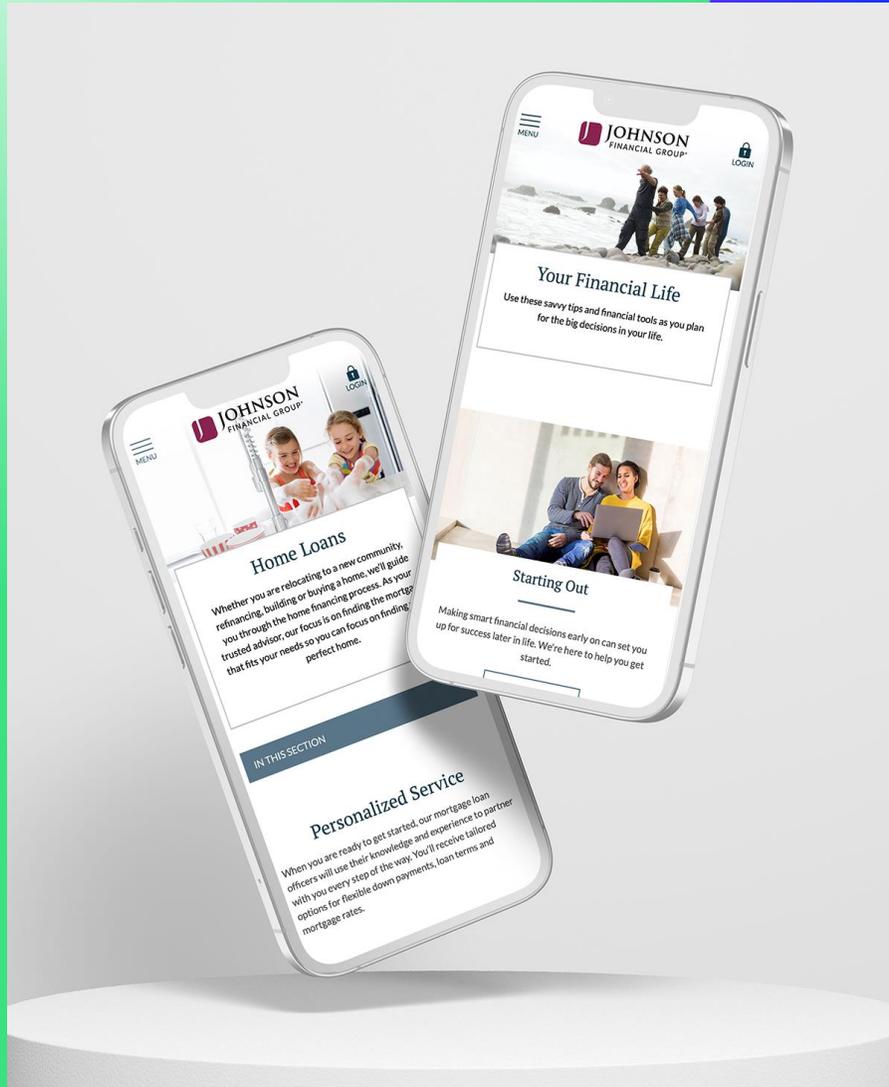
Full-Service Digital Experience Agency Partner  
to Johnson Financial Group Since 2019

- Digital Strategy
- CMS/DXP Development
- Experience Design
- Digital Marketing
- Data & Insights



02

**The Foundation for  
Personalization**



# Personalization

## Starting Small: Content Recommendations

- Related Resources
- “We Can Also Help You With” Section

## Continuously Maturing: Enabled the Capability Across the Site

- Navigation
- Example: Homepage redesign brings a unified OneJFG experience

03

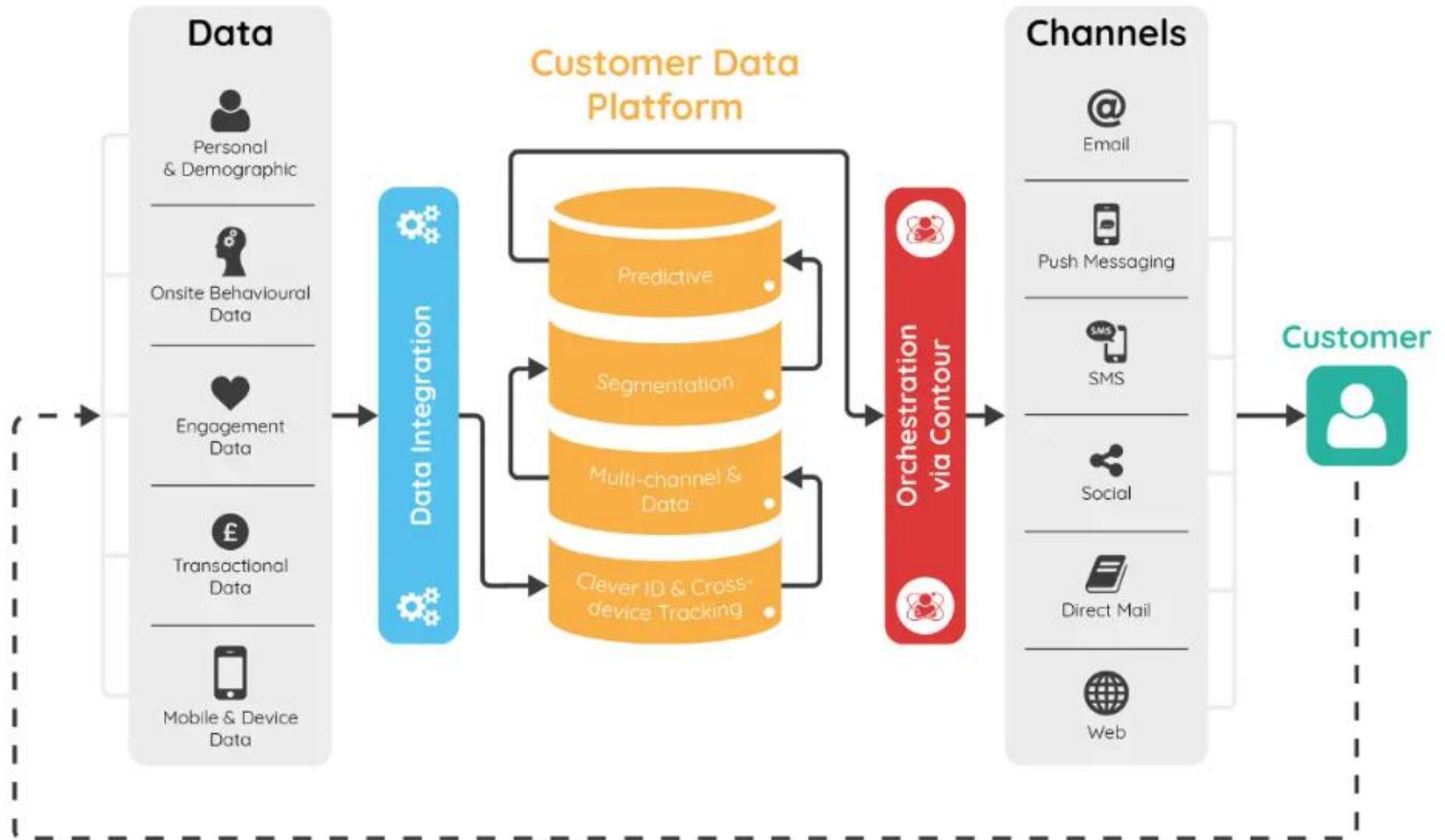
**Crafting Data-Driven  
Experiences**

# Optimizely Data Platform (ODP)

## Crawl, Walk, Run

- Financial services regulations
- Website data was kept within our marketing department to create a proof of concept.
- Digital roadmap via Verndale, including:
  - Importing historical data
  - Building profiles
  - Enriching profiles
  - Creating business & marketing goals





04

Live Digital Experience

**Envisioning the Art  
of the Possible**

### Credit Union can help you reach short-term savings goals.

Overall, Credit Union offers enough interest-earning account options to fit most people's banking needs. Take time to compare its rates to other top online banks so you can make the right banking choice for you.

Learn More



### Recommended Products



**Product 1**

Lorem ipsum dolor sit amet



**Product 2**

Lorem ipsum dolor sit amet



**Product 3**

Lorem ipsum dolor sit amet



**Product 4**

Lorem ipsum dolor sit amet

### Book an appointment

Name Last Name

Email

Product

Date

12:00 PM 10:00 PM 09:00 PM

01:00 PM 05:00 PM 02:00 PM

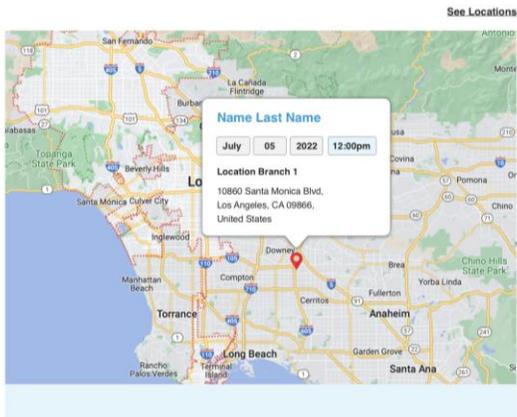
Search Location

**Los Angeles Branch 1**

14.3 Miles from your location

10860 Santa Monica Blvd,  
Los Angeles, CA 09866,  
United States

Submit



### Recommended Products

# Fully Integrated DXP Experience

## Delivering 1-to-1 Personalization Real-Time Across:

- Web
- Ads
- SMS
- Email
- Mobile App



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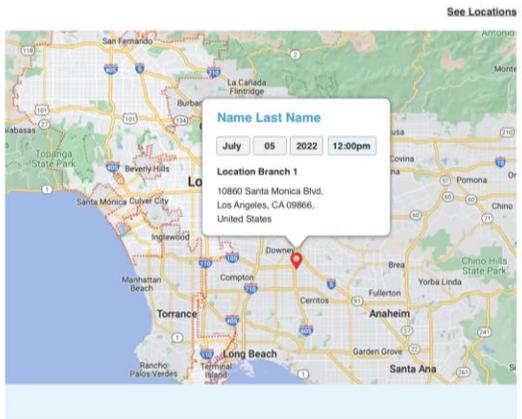
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### Recommended Products

# Fully Integrated DXP Experience

## Integrated Optimizely products for a unified experience:

- Content Cloud
- Content Recommendations
- Web Experimentation
- Feature Experimentation
- ODP
- Search
- Salesforce CRM\*

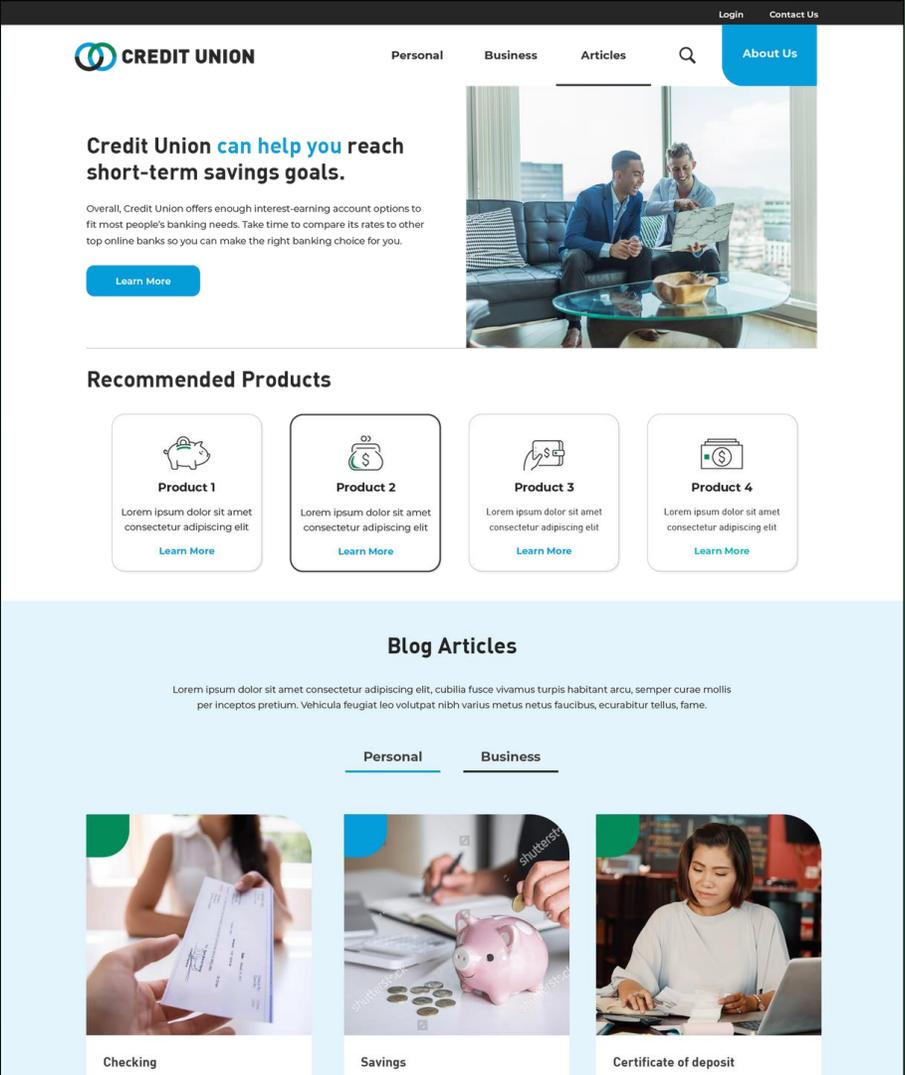
# Our Content Profiling Matrix

	Life stages	Teen	College Student	Recent Graduate	First Job	First Business	Marriage	House Purchase	Homeowner	First Child	College	Retirement
<b>Products</b>												
Car Loan				X	X	X	X	X		X	X	X
Mortgage								X				
Home Refinance									X			
Home Equity Loan									X			
529 College Savings		X	X							X		
401k				X	X	X	X	X		X	X	
CD												X
Credit Card			X	X	X		X	X		X	X	
Savings Account		X	X	X	X		X	X		X	X	
Checking Account				X	X		X	X		X	X	
Investment Account					X		X	X		X	X	X
Business Loan						X						
Business Line of Credit						X						
Business Checking Account						X						

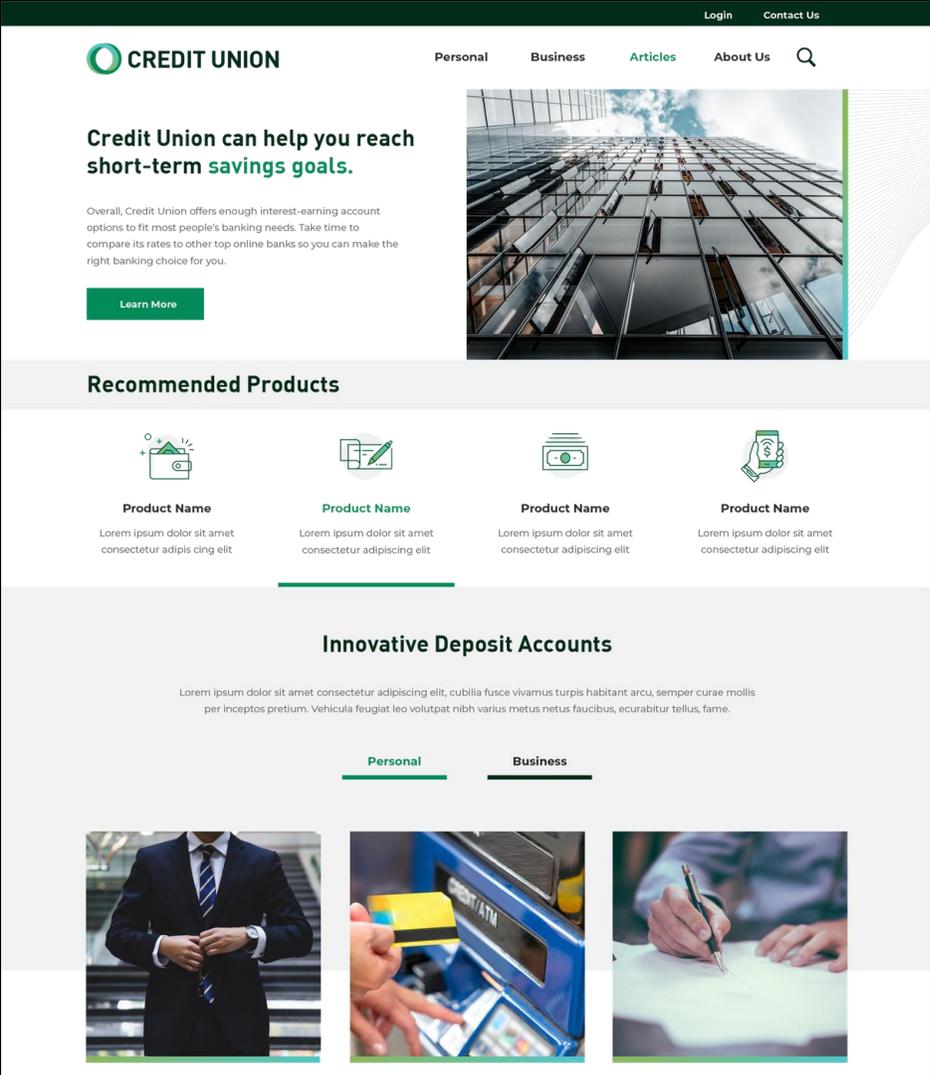


1-to-1 personalization by mapping offerings to user's life stages and interests

# Running Real-Time Experiments



This screenshot shows the control version of the Credit Union website. The main headline reads "Credit Union can help you reach short-term savings goals." and is accompanied by a photograph of two men in business attire reviewing documents on a sofa. Below this is a "Recommended Products" section with four cards, each featuring an icon and a "Learn More" button. The "Blog Articles" section is titled "Blog Articles" and includes a sub-header for "Personal" and "Business" categories, with three article thumbnails labeled "Checking", "Savings", and "Certificate of deposit".



This screenshot shows the treatment version of the Credit Union website. The main headline is "Credit Union can help you reach short-term savings goals." and is accompanied by a photograph of a modern glass skyscraper. Below this is a "Recommended Products" section with four cards, each featuring an icon and a "Learn More" button. The "Innovative Deposit Accounts" section is titled "Innovative Deposit Accounts" and includes a sub-header for "Personal" and "Business" categories, with three article thumbnails showing a man in a suit, an ATM, and hands writing on a document.

