



# Integrating good data for the purposes of personalization

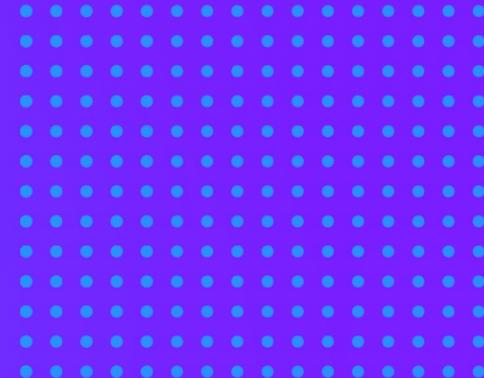


**Nicola Ayan**

VP, Solution Strategy

**Kunal Shetye**

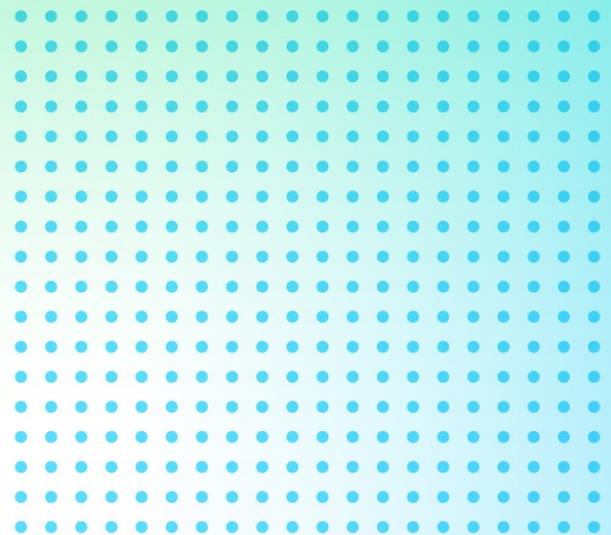
Senior Solution Architect



# Agenda

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- 1. Good data, bad data**
- 2. The 3-step process**
- 3. Connect platform deep dive**
- 4. See it in action**



# 01

Think you know your customers?

**Good data, Bad data**

# Despite all the talks around innovation, we must face the hard truths about the state of our efforts.

**29%**

of consumers agree  
“companies do a good job  
understanding me as a  
person.”

**13%**

of online adults say that  
“brands make me feel  
valued.”

**5%**

of online adults say that  
“emails are relevant and  
well timed to my needs.”

# Think you know your customers?

email address

buying history

birth date

age

gender

post code

order likelihood  
time to next order  
contact us queries  
abandoned cart  
ratings  
mobile number  
price sensitivity  
store visits  
pageviews  
topic interest  
research v buy phase  
search keywords  
live chat queries  
downloads  
abandoned form  
newsletter signup  
ads clicked  
time spent on website  
color preference  
brand  
intent  
experimental conditions  
product attribute curiosity  
morning v evening person  
Important nuance  
favourite social channel

# BLOCKBUSTER

BEST  
SELECTION

211

WEST  
LEASES

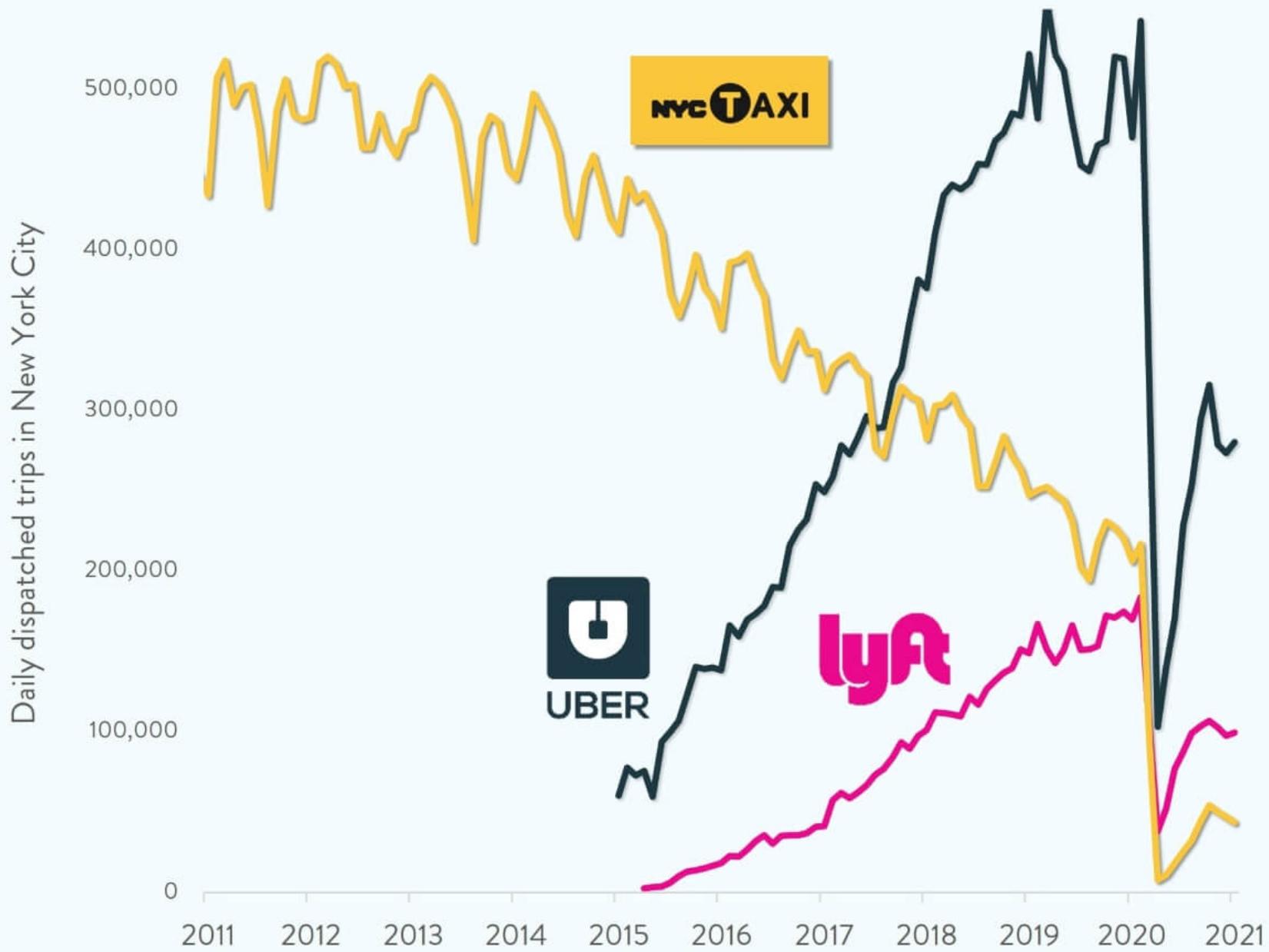




Interactive chart of historical net worth (market cap) for Netflix (NFLX) over the last 10 years. How much a company is worth is typically represented by its market capitalization, or the current stock price multiplied by the number of shares outstanding. Netflix net worth as of July 31, 2023 is **\$188.68B**.



Source: <https://www.viima.com/blog/disruptive-innovation>



Source: FHV Base Aggregate Report  
& NYC Taxi & Limousine Commission

charttr



*“Customer don’t really buy products. They **“hire”** them to get a job done.”*



Disruptive Innovation Theory  
by Clayton Christensen

# Help me unwind after work



- Time-consuming store visits
- No catalogs, no recommendations
- Late fees, late fees, late fees
- Requires expensive VCR machine

- ✓ Instant access from home
- ✓ Smart recommendation system
- ✓ Only subscription fees, no late fees
- ✓ Available on any smart device

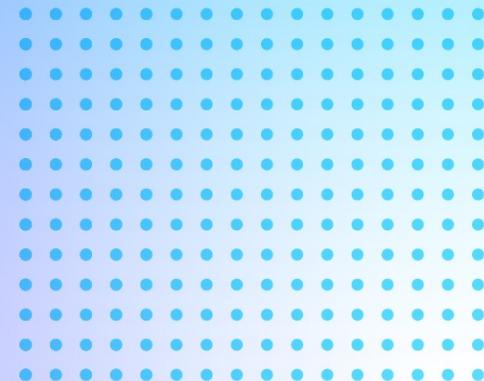


**Organizations don't have a  
personalization problem.  
They have a data problem.**

**Brendan Witcher**

VP and Principal Analyst, Digital Business Strategy

Forrester



# Unlock true customer understanding using the 6C Strategy



## Characteristics

What are the objective/subjective definitions that apply?



## Considerations

What is the intent to buy/accomplish at this moment?



## Curiosities

What product or service attributes/options that matter most?



## Conditions

What experiential components would be positive/negative?

# “Trapped Travelers”

Visitors who have a higher Flight search rate, but lower session CVR compared to other segments

**AIR NEW ZEALAND** Plan Book Experience Airpoints™ Help  Manage Booking Check In Sign In

## Discover more of New Zealand Sale

For a limited time, add a second city with our network of 19 destinations throughout New Zealand.

- Los Angeles to Auckland**  
from **\$1,175\***  
Round Trip Per Person  
[See More](#)
- Add a second city in New Zealand**  
For **\$0\*** Limited Time  
[See More](#)
- Premium Economy to Auckland**  
from **\$2,975\***  
Round Trip Per Person  
[See More](#)
- Business Premier to Auckland**  
from **\$7,275\***  
Round Trip Per Person  
[See More](#)

Book your trip | Manage booking | Check-in

→ Book a flight | 🏠 Book a hotel | 🚗 Book a rental car

From  To  [Continue](#)



### Wonders of New Zealand

Fly non-stop from six US gateways to New Zealand

[See more](#)



### Economy Stretch

Fly from Los Angeles to New Zealand with Economy Stretch. Experience the stretch zone, where every inch counts and every seat provides comfort and style.

New  
[See more](#)



### Explore New Zealand

From cities to stunning landscapes, find your perfect escape.

[See more](#)



# “Trapped Travelers”

Consideration Research phase

Curiosity Price

Condition Discounted price

Context High flight-search rate, low session conversion rate

AIR NEW ZEALAND 

Los Angeles to Auckland Tue 10 Oct 2023 1 adult USD **\$2,544.35**  
incl. taxes & charges

Auckland to Los Angeles Thu 12 Oct 2023 [Modify search](#) [VIEW DETAILS](#)

1 Select your flights 2 Enter passenger details 3 Extras 4 Select your seats 5 Review and pay

Los Angeles to Auckland return

Lowest return prices are shown for the total fare per adult. Fares include applicable taxes and charges except where local airport departure fees are collected at departure. Once dates are selected you will be able to view all flight options.

|            | Depart                        |                               |                               |  |                               |                               |  |
|------------|-------------------------------|-------------------------------|-------------------------------|--|-------------------------------|-------------------------------|--|
| Depart →   | Sat 07 Oct                    | Sun 08 Oct                    | Mon 09 Oct                    | Tue 10 Oct                               | Wed 11 Oct                    | Thu 12 Oct                    | Fri 13 Oct                                   |
| Return ↓   |                               |                               |                               |  |                               |                               |  |
| Mon 09 Oct | <input type="radio"/> \$2,595 | Not available                 | Not available                 | Not available                            | Not available                 | Not available                 | Not available                                |
| Tue 10 Oct | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | Not available                 | Not available                            | Not available                 | Not available                 | Not available                                |
| Wed 11 Oct | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,545 | Not available                            | Not available                 | Not available                 | Not available                                |
| Return     |                               |                               |                               |  |                               |                               |  |
| Thu 12 Oct | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,545 | <input checked="" type="radio"/> \$2,545 | Not available                 | Not available                 | Not available                                |
| Sat 14 Oct | <input type="radio"/> \$2,295 | <input type="radio"/> \$2,645 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595            | <input type="radio"/> \$3,045 | <input type="radio"/> \$2,674 | Not available                                |
| Sun 15 Oct | <input type="radio"/> \$2,295 | <input type="radio"/> \$2,370 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595            | <input type="radio"/> \$3,045 | <input type="radio"/> \$2,674 | <input type="radio"/> \$4,275<br>Mixed class |

Los Angeles to Auckland Tue 10 Oct 2023 1 adult USD **\$2,544.35**  
incl. taxes & charges

Auckland to Los Angeles Thu 12 Oct 2023 [Modify search](#) [VIEW DETAILS](#)

[Continue](#)

**Contact Us**  
Online booking help:  
1-800-262-1234  
 Need some help? Ask Oscar  
More contact options and TTY assistance  
Send us feedback

**Online Help**  
Frequently Asked Questions  
More help options

**Website Terms of Use**  
Privacy Policy  
Browser compatibility  
Conditions of Carriage



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# “Trapped Travelers”

## Test Hypothesis

Display Special Offers sign up link will appeal to their needs for price comparison and promotion

AIR NEW ZEALAND 

Los Angeles to Auckland Tue 10 Oct 2023 1 adult USD **\$2,544.35**  
incl. taxes & charges

Auckland to Los Angeles Thu 12 Oct 2023 [Modify search](#) [VIEW DETAILS](#)

1 Select your flights 2 Enter passenger details 3 Extras 4 Select your seats 5 Review and pay

Los Angeles to Auckland return

Lowest return prices are shown for the total fare per adult. Fares include applicable taxes and charges except where local airport departure fees are collected at departure. Once dates are selected you will be able to view all flight options.

|                      | Depart                        |                               |                               |  |               |               |               |
|----------------------|-------------------------------|-------------------------------|-------------------------------|--|---------------|---------------|---------------|
| Depart →<br>Return ↓ | Sat 07 Oct                    | Sun 08 Oct                    | Mon 09 Oct                    | Tue 10 Oct                               | Wed 11 Oct    | Thu 12 Oct    | Fri 13 Oct    |
| Mon 09 Oct           | <input type="radio"/> \$2,595 | Not available                 | Not available                 | Not available                            | Not available | Not available | Not available |
| Tue 10 Oct           | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | Not available                 | Not available                            | Not available | Not available | Not available |
| Wed 11 Oct           | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,545 | Not available                            | Not available | Not available | Not available |
| Return               |                               |                               |                               |  |               |               |               |
| Thu 12 Oct           | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,595 | <input type="radio"/> \$2,545 | <input checked="" type="radio"/> \$2,545 | Not available | Not available | Not available |

**+1924%** improvement in  
Special Offers sign up rate  
(Statistically significant)

Get sales, competitions, and exclusive offers delivered straight to your inbox.

[Sign up for Special Offers Now](#)

[Not Now](#)

v2

# Unlock true customer understanding using the 6C Strategy (cont.)



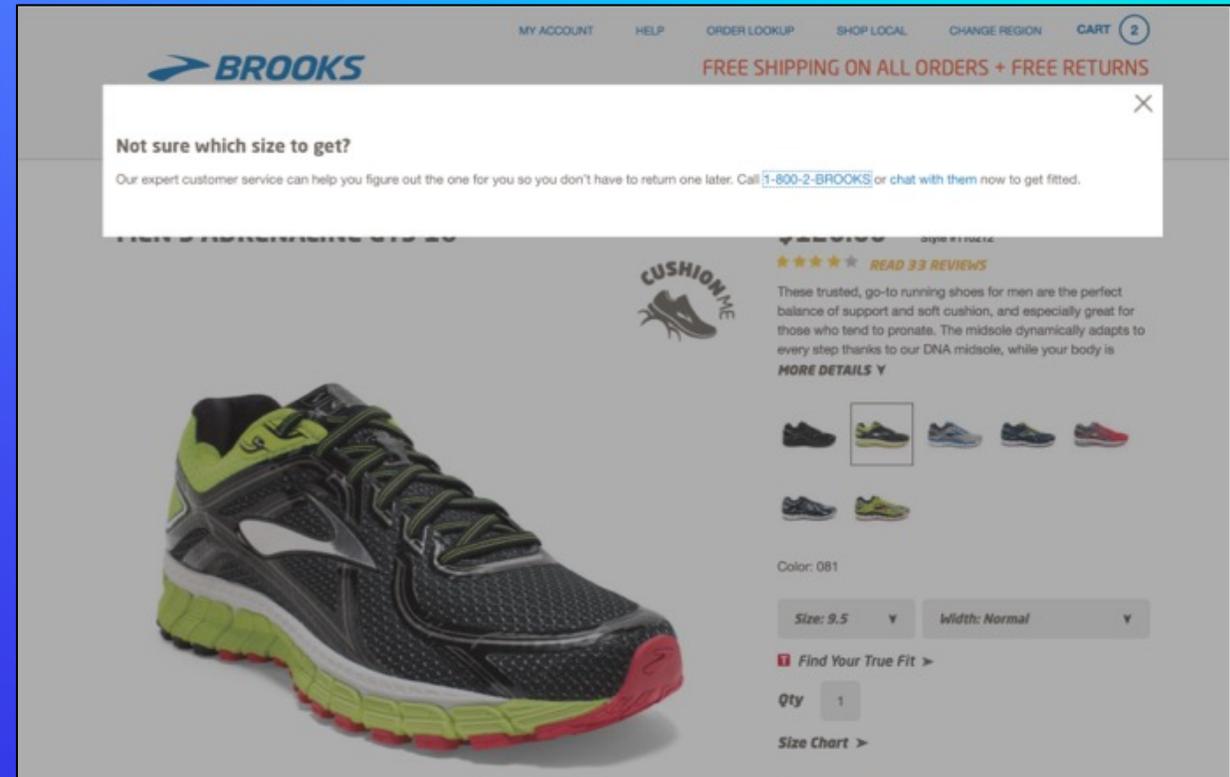
## Context

What situational/historic data creates important nuances?



## Conceptions

What would create a positive/negative influential emotion?



# 02

The 3-step process:

**Harmonize,  
Understand,  
Personalize**



CRM Data



Ecommerce



Data Consent



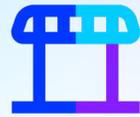
Downloads



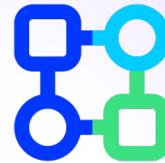
Digital Analytics



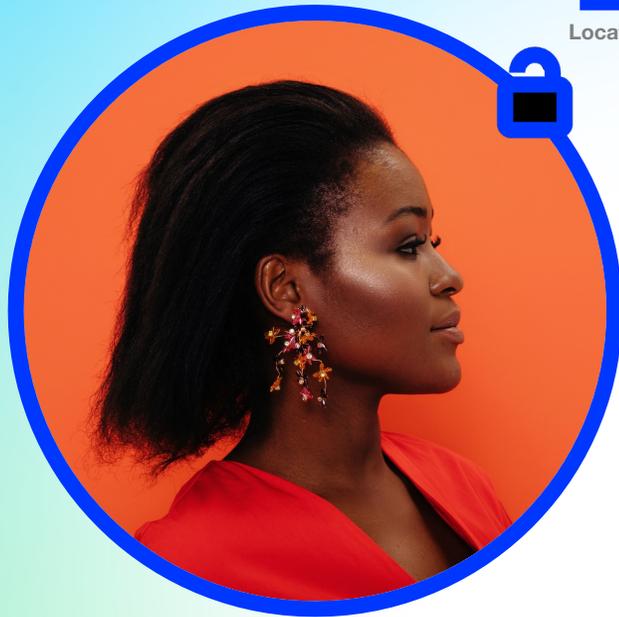
Website Visits



Location Visits



Experiments



Proprietary Data



Marketing Channels



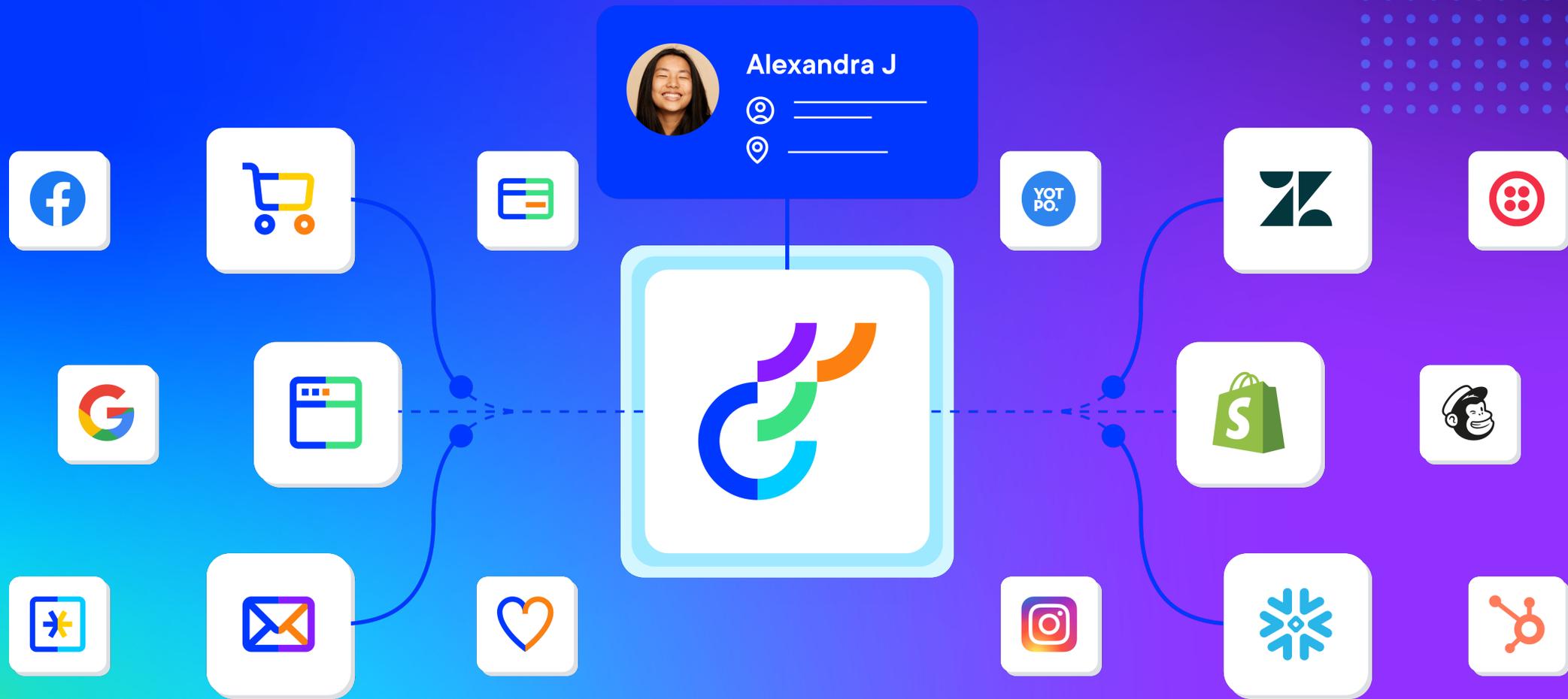
Media Engagement



Search Results

# Introducing the Optimizely Data Platform

# Step 1: Harmonize Customer Data



## STEP 1: Harmonize Customer Data

# How to ingest data into the Optimizely Data Platform

**App Directory**  
(70+ pre-built 1-click connectors)

**Connect Platform**  
(build your own connectors)

**NEW**

Web SDK

REST API

Graph QL

AWS S3  
upload

File upload

# Step 2: Understand your data



**Get a unified  
profile view**

# Step 2: Understand your data

Customer Attributes

Channel reachability

**Customer Metrics:**

- 95th percentile LIFETIME VALUE: \$2995
- 60th percentile AVG ORDER VALUE: \$85.57
- 95th percentile SINCE SEPTEMBER 2019: 35 orders

**Customer Profile:** Teresa Villa, First seen December 2019

**Contact Information:** 3045651158167650307@sink.zaius.com, 3045651158167650307Zaius Road

**Order Likelihood:** Likely, About 24 days to next order, Churned

**Event History:** Jun 13, 12 Events

**Event Timeline:**

| Event Type      | Description  | Time           |
|-----------------|--|----------------|
| Pageview        | Thank you for your order! - ZAIUS  | Jul 12, 7:55pm |
| Order: Purchase | Total: \$56.18 (\$10.00 discount)  | Jul 12, 7:55pm |
| Pageview        | ZAIUS - Take off up to 70% on top brands                                   | Jul 12, 7:55pm |
| Pageview        | Shopping Cart - ZAIUS  | Jul 12, 7:46pm |
| Product: Detail | Sociology Women's Canvas Boat Shoes - Black/White Stripe - Size: 7         | Jul 12, 7:46pm |
| Pageview        | Sociology Women's Canvas Boat Shoes - Black/White Stripe - Size: 7 - ZAIUS | Jul 12, 7:46pm |

Event Timeline

# Step 2: Understand your data



**Get a unified  
profile view**



**Get auto-generated  
customer observations  
and insights**

# Step 2: Understand your data

**Data Enrichment**

- 95th percentile LIFETIME VALUE: \$2995
- 60th percentile AVG ORDER VALUE: \$85.57
- 95th percentile SINCE SEPTEMBER 2019: 35 orders

**Customer Attributes**

**Teresa Villa**  
First seen December 2019

**Channel reachability**

- 3045651158167650307@sink.zaius.com  
[View Reachability Status](#)
- 3045651158167650307Zaius Road

**Data Science**

- ORDER LIKELIHOOD: **Likely**
- TIME TO NEXT ORDER: **About 24 days**
- WINBACK ZONE: **Churned**

**Event Timeline**

E-Commerce Session Jun 13 12 Events

Event History: Customer Details, Identifiers, List Subscriptions

7 months ago →

Campaign Subscription E-Commerce App Other

| Event Type      | Description   | Time           |
|-----------------|---|----------------|
| Pageview        | Thank you for your order! - ZAIUS<br>www.demo.zaius.com/checkout/success/5759ff58da73260ca0001002   | Jul 12, 7:55pm |
| Order: Purchase | Total: \$56.18 (\$10.00 discount)<br>Order ID: 2011707<br>Current Status: purchased   | Jul 12, 7:55pm |
| Pageview        | ZAIUS - Take off up to 70% on top brands<br>www.demo.zaius.com/checkout/paypal/review   | Jul 12, 7:55pm |
| Pageview        | Shopping Cart - ZAIUS<br>www.demo.zaius.com/cart  | Jul 12, 7:46pm |
| Product: Detail | Sociology Women's Canvas Boat Shoes - Black/White Stripe - Size: 7  | Jul 12, 7:46pm |
| Pageview        | Sociology Women's Canvas Boat Shoes - Black/White Stripe - Size: 7 - ZAIUS<br>www.demo.zaius.com/detail/clothing-accessories/women/womens-shoes/sociology-womens-canvas-boat-shoes-black-white-stripe-size-7/818628 | Jul 12, 7:46pm |

# Step 2: Understand your data



**Get a unified  
profile view**



**Get auto-generated  
customer observations  
and insights**

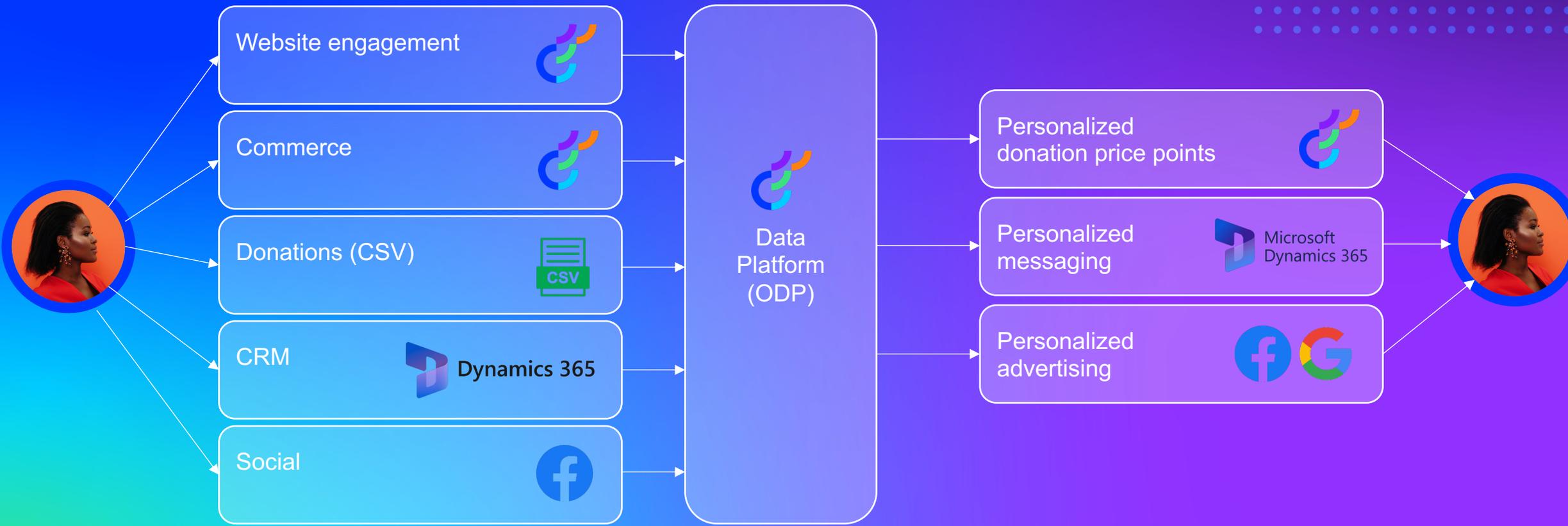


**View company  
dashboards and  
build your own  
business reports**

# Step 3: Activate a personalized experience, everywhere!

| Real-time activation  |  | Segment sync  |   |
|---|--|---|---|
| Personalized browsing experience  | Experimentation targeting  | Personalized advertising  | Personalized messaging  |
|  Content Management System |  Web Experimentation      |    |    |
|  Customized Commerce      |  Feature Experimentation |   |   |
|  Configured Commerce     |  |   |   |

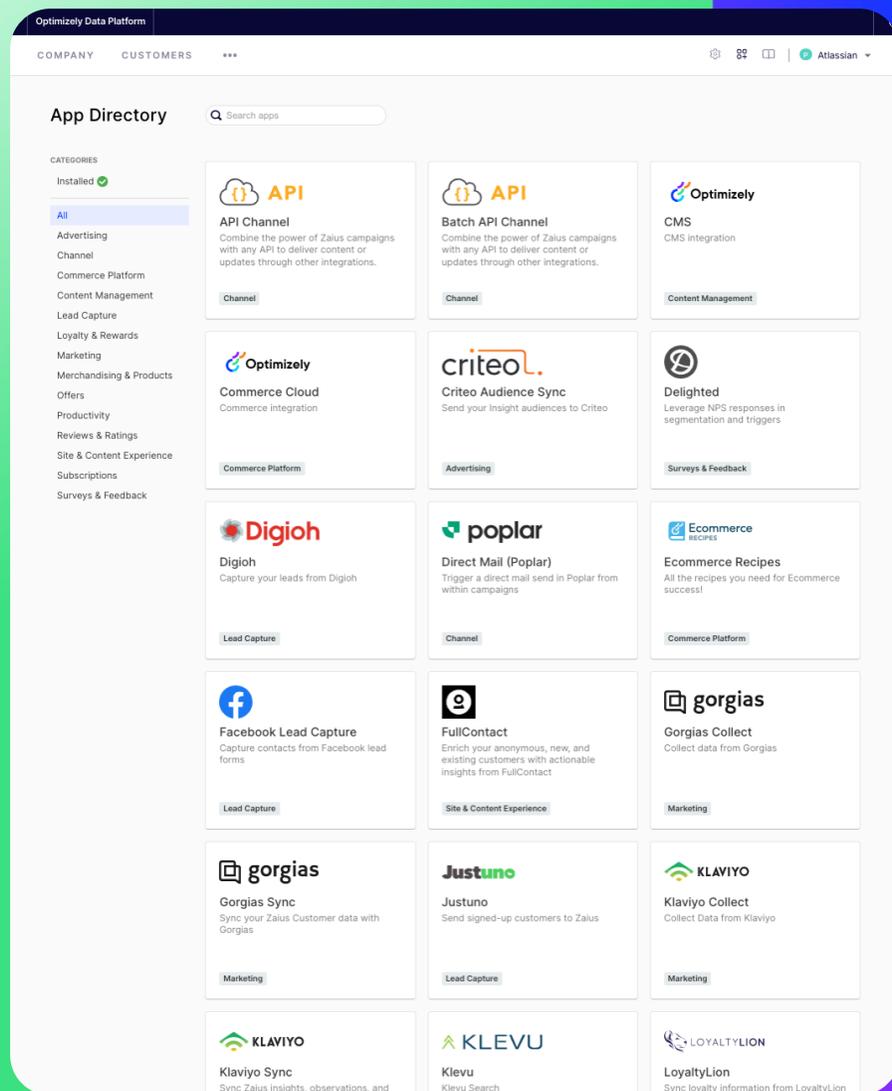
# Not-For-Profit builds a case for a Customer Data Platform implementation



# 03

Optimizely Connect Platform

**Deep Dive**



# What is the Connect Platform?

- Single point of integration for Optimizely's DXP and 3<sup>rd</sup> party platforms
- **For Customers:** Single place to discover, install, and manage integrations across the whole suite
- **For Partners & Developers:** Streamlined path to develop and deploy integrations to the Optimizely ecosystem

# When to use Optimizely Connect Platform



**Transform data  
from a third-party  
service and import  
it into ODP**

**Periodically fetch  
a batch of data  
from a third-party  
service**

**Expose a webhook  
and register it in a  
third-party service  
to retrieve events**

**Import / Export a  
customer defined  
segment of users  
from ODP to a  
third-party service**

# Setting up the OCP CLI

## Prerequisites

- You need the API key from your invitation email.
- The OCP CLI requires the Node.js 18 and Yarn.

1. Run the following command to make a `.ocp` directory:

```
Shell  
mkdir ~/.ocp (home dir)
```

2. Using the API key you received during onboarding, create the credentials file directory:

```
Shell  
echo '{"apiKey": "<value-from-invitation>"}' > ~/.ocp/credentials
```

3. Run the following Yarn command to install the OCP CLI:

```
Shell  
yarn global add @optimizely/ocp-cli
```

4. Set your `PATH` variable:

```
Shell  
export PATH="$(yarn global bin):$PATH"
```

# Validating your OCP token

- ocp account whoami

```
kunal.shetye at kunalshetye in ↵
└─┬ ocp accounts whoami
Active environment: production
personal_apps:
  - id: helloworld
  - id: helloworld2
id: c06d3ff8-72b4-4e58-a650-729cf2b93055
email: kunal.shetye@optimizely.com
role: developer
githubUsername: null
accounts:
  - trackerId: W4WzcEs-ABgXorzY7h1LCQ
    shard: us
  - trackerId: eDaKh4_ewx5tHIIndsJiwfw
    shard: us
createdAt: '2022-05-24T14:14:13'
vendor: optimizely
vendor_apps:
  - id: salesforce_crm_sync
  - id: helloworld2
  - id: demoapp1
  - id: unirec
  - id: full_contact_app
  - id: slack_experimentation
  - id: tealium
  - id: demo_app
  - id: dotdigital_v2
  - id: opti_cli_test
  - id: ocp_full_contact
  - id: full_contact
  - id: ocp_shakedown
  - id: helloworld
  - id: demoapp
```

# Scaffold your app

- ocp app init

```
[redacted] Code % opti app init
Active environment: production
[Name of your app (e.g., My App): My New Marketing Ap
[ID of your app [my_new_marketing_app]: my_new_market
[Version [0.0.0]: 0.0.0-dev.1
[App Summary (brief): My new marketing app
[Support URL: http://support.mynewmarketingapp.com
[Contact email address: support@mynewmarketingapp.com
Select the category for the app: Marketing
Select a template project: Basic Sample
[Creating directory /Users/[redacted]/Code/my-ne
Performing initial Yarn install
yarn install v1.22.19
info No lockfile found.
[1/4] 🔍 Resolving packages...
[2/4] 🚚 Fetching packages...
[3/4] 🔗 Linking dependencies...
warning " > grpc-boom@3.0.11" has incorrect peer dep
[4/4] 🔨 Building fresh packages...
success Saved lockfile.
🌟 Done in 30.27s.

New Opti app project created at /Users/[redacted]

    * View README.md for information on getting star
    * Check out the documentation \(https://docs.deve/v1.5.0-optimizely-data-platform/docs/optimizely-con
```

# The Structure of an OCP App



**app.yml**

- includes the definition of your app



**assets**

- **Logo.svg**
- **directory/overview.md**
- **docs/index.md**



**forms**

- **settings.yml**
- **content-settings.yml**
- **content-template.yml**



**src**

- **channel/**
- **lifecycle/**
- **liquid-extensions/**
- **functions/**
- **jobs/**

# Prepare App

- ocp app prepare

```
[simon.chapman@simonchapman marketing-app % opti app prepare
Active environment: production
Performing local validation...
$ npx eslint src --ext ts
$ yarn && npx rimraf remove dist && npx tsc && npx ncp ap
  copy src/schema dist/schema
[1/4] 🔍 Resolving packages...
success Already up-to-date.
Need to install the following packages:
  ncp@2.0.0
[Ok to proceed? (y) y
Checking if existing and, if not, creating directory src/
Directory src/schema exists.
Copying file or directory ... from 'src/schema' to 'dist/
Copy complete...
$ npx jest --passWithNoTests
PASS src/lib/transformToCustomer.test.ts
  transformToCustomer
    ✓ transforms an incoming customer into a Zaius custom
PASS src/functions/HandleEvent.test.ts
  HandleEvent
    ✓ generates a customer update (1 ms)
    ✓ generates an event

Test Suites: 2 passed, 2 total
Tests:       3 passed, 3 total
Snapshots:   0 total
Time:        1.491 s
Ran all test suites.
Looks good to me
```

# Publish and Install App

- ocp directory publish marketing\_app@0.0.0-dev.1
- ocp directory install marketing\_app@0.0.0-dev.1 <tracker-id>

```
Verifying upload constraints...
Existing version not found...
Packaging files in /Users/simon.chapman/my-new-marketing-app/marketing-app
.eslintrc.js
.gitignore
app.yml
assets/directory/overview.md
assets/docs/index.md
assets/icon.svg
assets/logo.svg
forms/settings.yml
jest.config.js
package.json
README.md
src/data/IncomingEvents.ts
src/functions/HandleEvent.test.ts
src/functions/HandleEvent.ts
src/jobs/HistoricalImport.ts
src/jobs/NightlyImport.ts
src/lib/transformToCustomer.test.ts
src/lib/transformToCustomer.ts
src/lifecycle/Lifecycle.ts
src/liquid-extensions/Rot13.ts
src/schema/customers.yml
tsconfig.json
yarn.lock
Uploading package...
Checking for existing version (us)...
Existing version not found...
Registering a new version (us)...
Starting build...
Waiting for build (id=2100) to complete... CTRL+C to stop checking.
Build complete. Ready to be published.

Use opti directory publish marketing_app@0.0.0-dev.1 to publish and release your app

[simon.chapman@simonchapman marketing-app % opti directory publish marketing_app@0.0.0-dev.1
Active environment: production
Publishing marketing_app@0.0.0-dev.1 to the directory...
Success. marketing_app@0.0.0-dev.1 is being published to us.
Watching for publish (us) to complete... CTRL+C to stop checking.
marketing_app@0.0.0-dev.1 has been published to us.
[simon.chapman@simonchapman marketing-app % opti directory install marketing_app@0.0.0-dev.1
Active environment: production
Installed marketing_app@0.0.0-dev.1 for W4o0M82j2znii7TJ2fsfYA with install id 3877
simon.chapman@simonchapman marketing-app % █
```

# And we're listed and installed

COMPANY CUSTOMERS ...

## App Directory

Q marketing app

CATEGORIES

- Installed ✓
- All
- Advertising
- Channel
- Commerce Platform
- Content Management
- Lead Capture
- Loyalty & Rewards
- Marketing

**Marketing App** ✓  
Marketing integration.

Marketing

*Note: Other apps can be found on the [Integrations Page](#).*

< ALL APPS

**Marketing App** v0.0.0-dev.1  
by Zaius

Installed ✓ Uninstall App

Marketing

App Help

OVERVIEW SETTINGS

## Marketing App

Marketing integration.

04

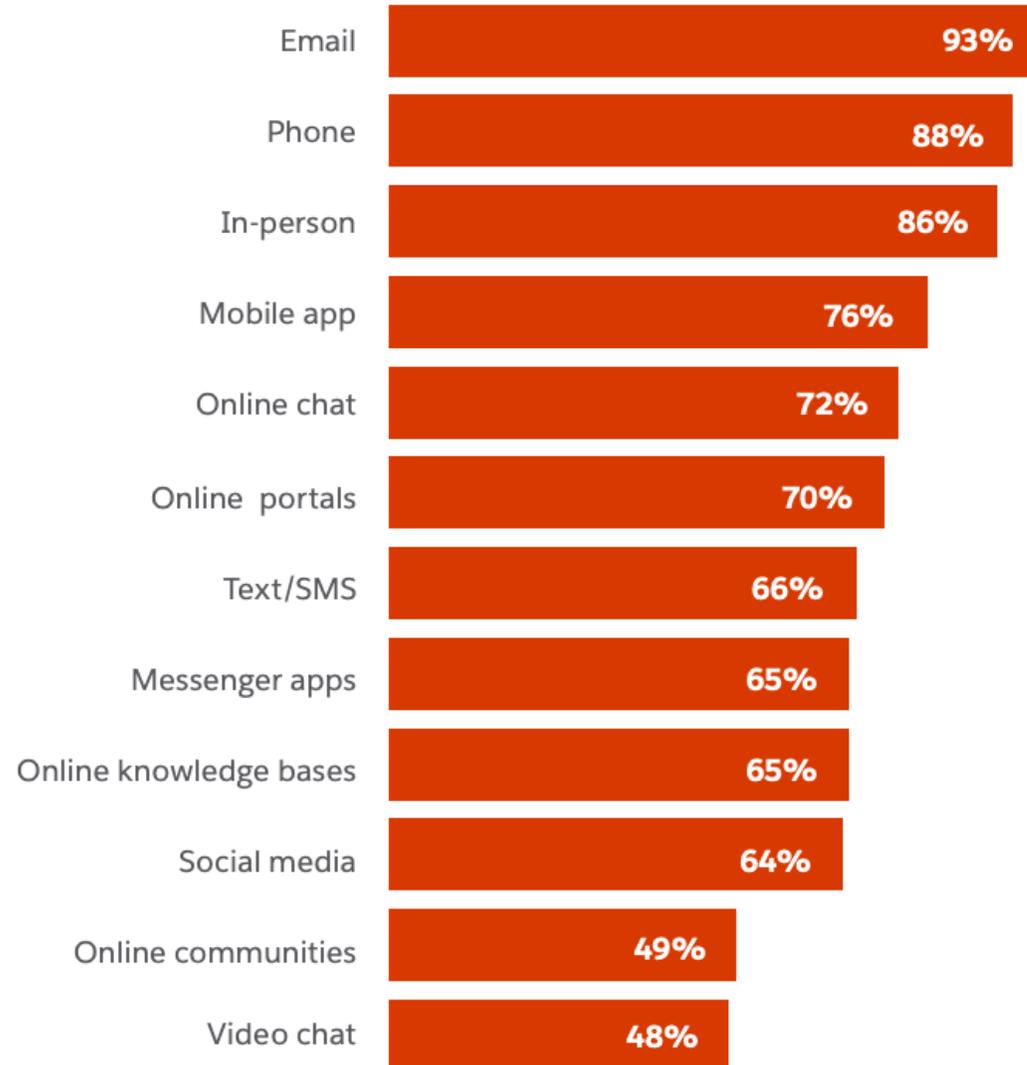
Demo

**Let's see it in action**

# Customer Engagement is Omni-Channel

- Salesforce Research

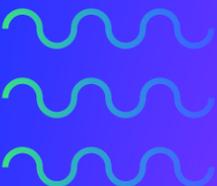
## Channels Used to Engage with Companies



## Social Networks for Engaging with Companies, Ranked by Popularity

1. Facebook
2. WhatsApp
3. YouTube
4. Instagram
5. Twitter
6. TikTok
7. WeChat

Base: Customers who have used social media to engage with companies.



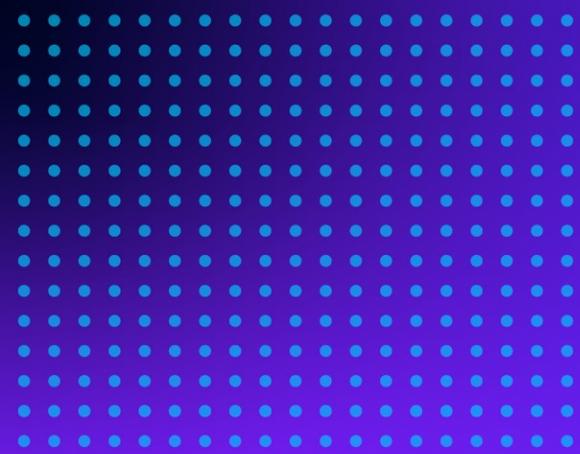
93%



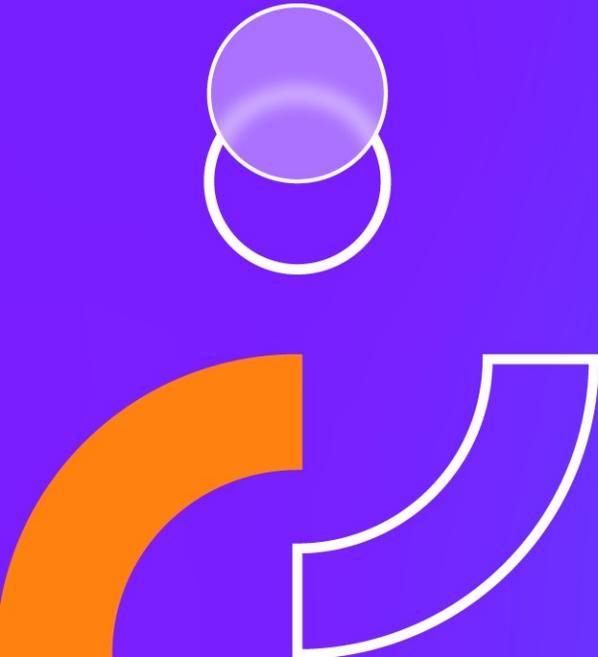
**Customers are likely to make repeat purchases with companies that offer excellent customer service.**

**- HubSpot Research**

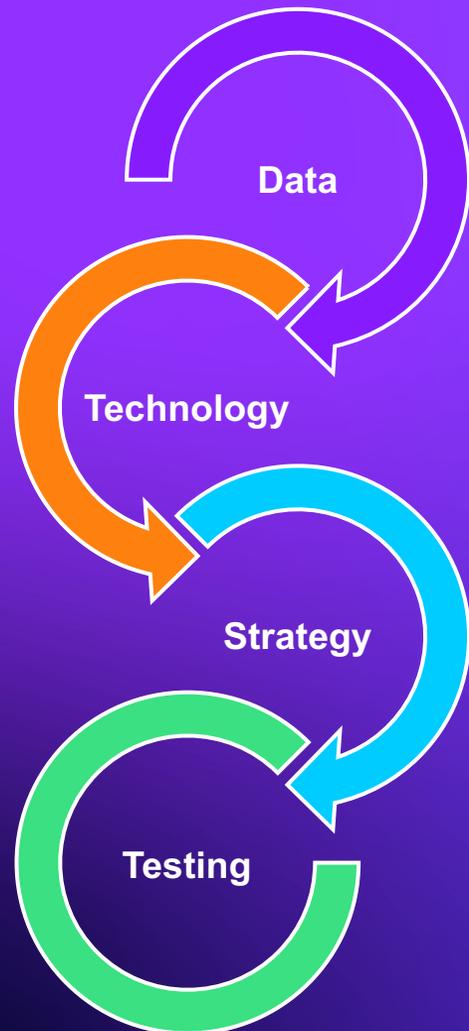
**Demo Time!**



**Any questions?**



# The Four Pillars of Personalization



**Integrating good data for the purposes of personalization**

Wednesday, 3:45pm

**Personalization: How to win with your content**

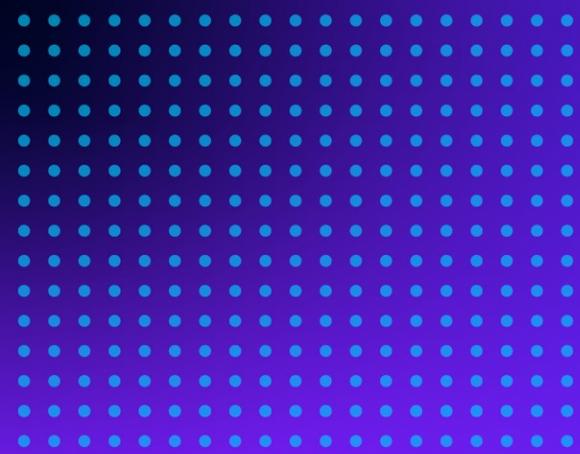
Thursday, 3:15pm

**Elevating your personalization strategy: A framework for success**

Thursday, 11am

**Personalization at scale: How Calendly leverages personalization for their 20 million users**

Thursday, 11am



**Thank you!**

