Opticon

Integrating good data for the purposes of personalization

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Agenda

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.”

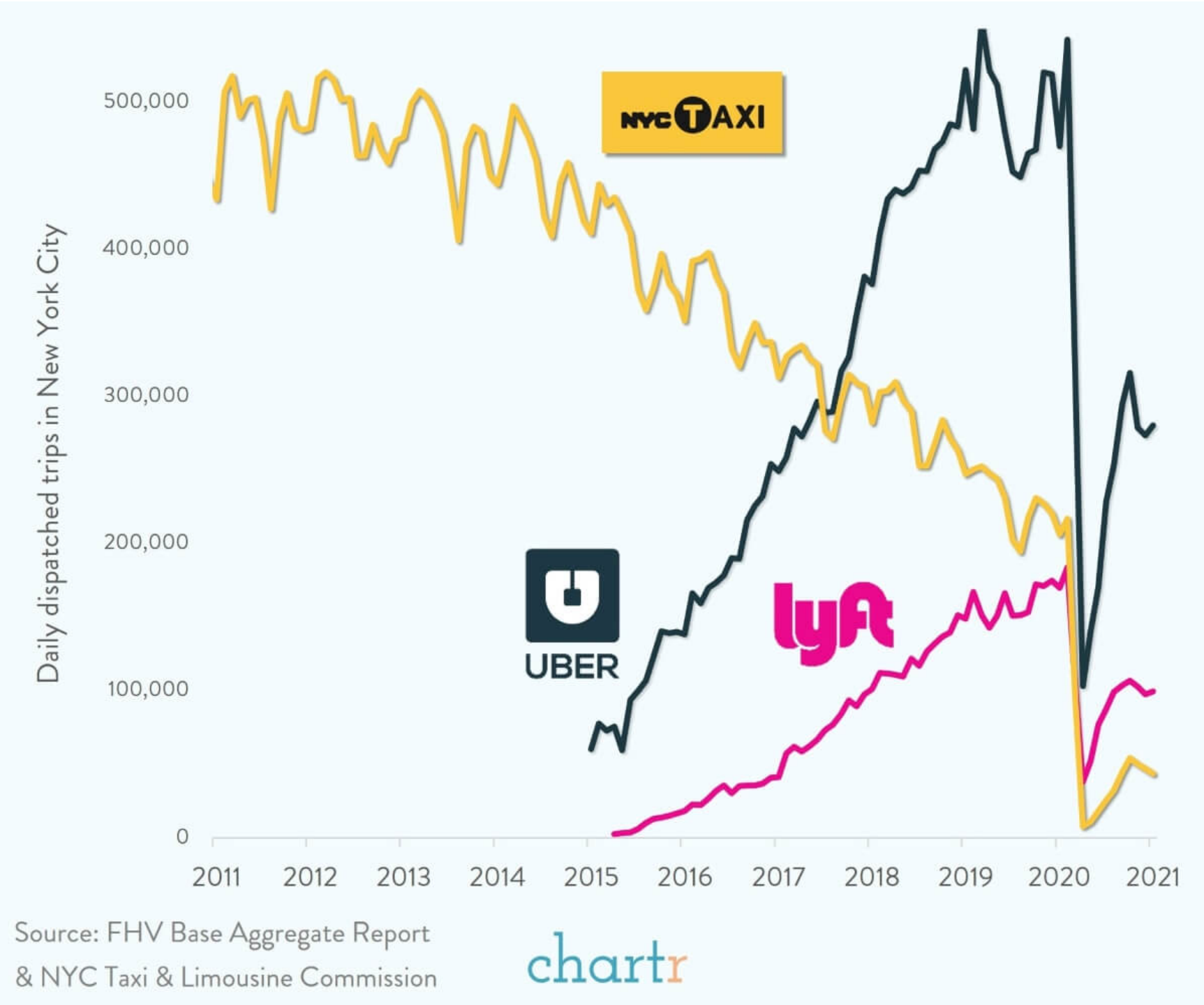
Think you know your customers?

BLOCKBUSTER
211

$189B!!!

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


NYC TAXI
UBER
lyft
Daily dispatched trips in New York City
500,000
400,000
300,000
200,000
100,000
0
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
Source: FHV Base Aggregate Report
& NYC Taxi & Limousine Commission
chartr

UBER
TAXI

“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

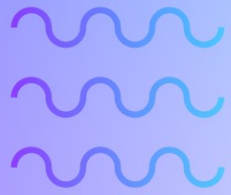
- ✓ Instant access from home
- ✓ Smart recommendation system
- ✓ Only subscription fees, no late fees
- ✓ Available on any smart device

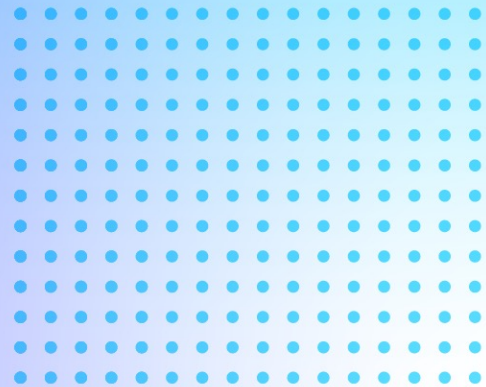
Organizations don’t have a personalization problem. They have a data problem.

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?

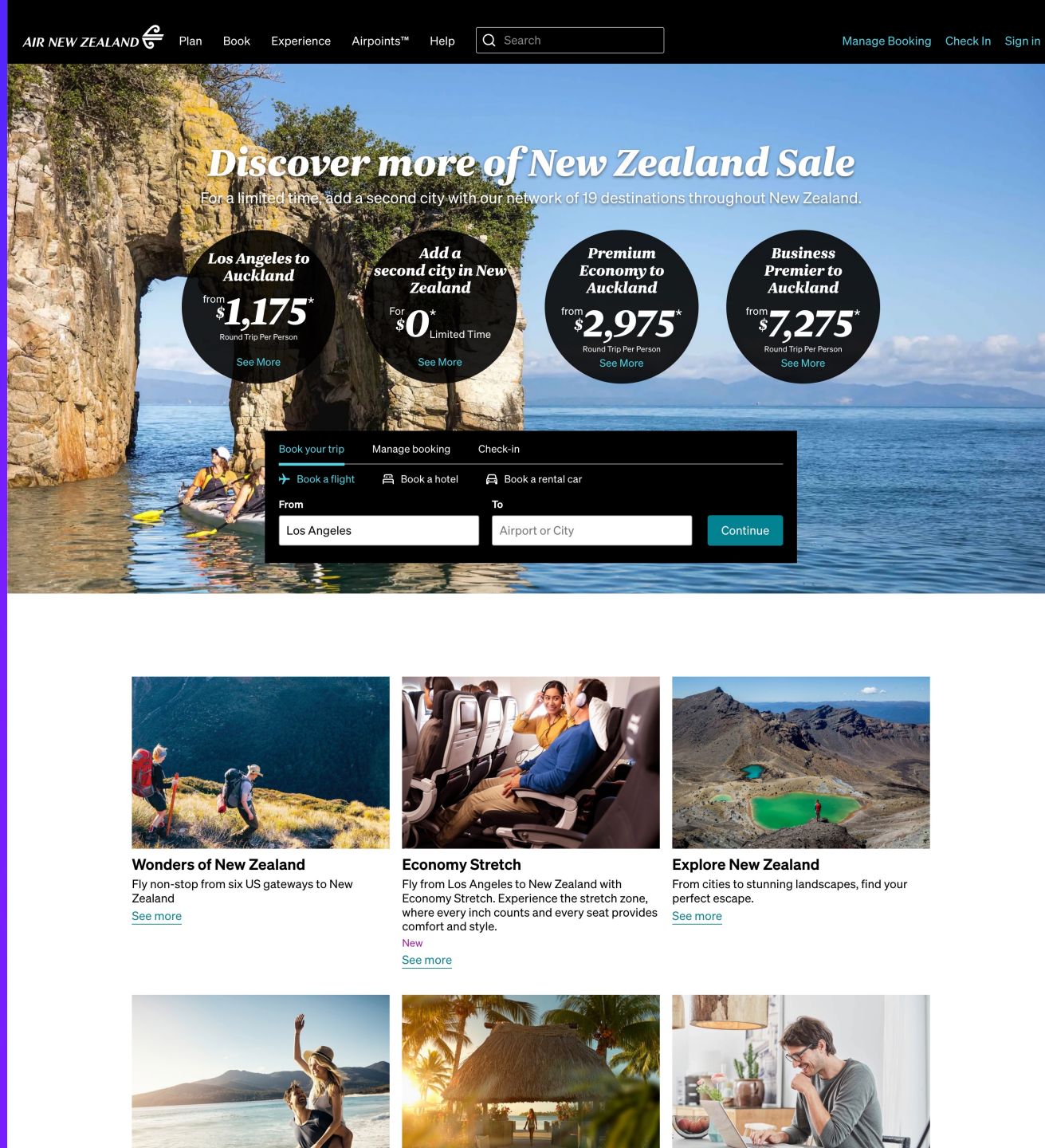
Conditions

What experiential components would be positive/negative?

Source: https://www.forrester.com/blogs/unlock-true-customer-understanding-the-power-of-what-and-how-data/

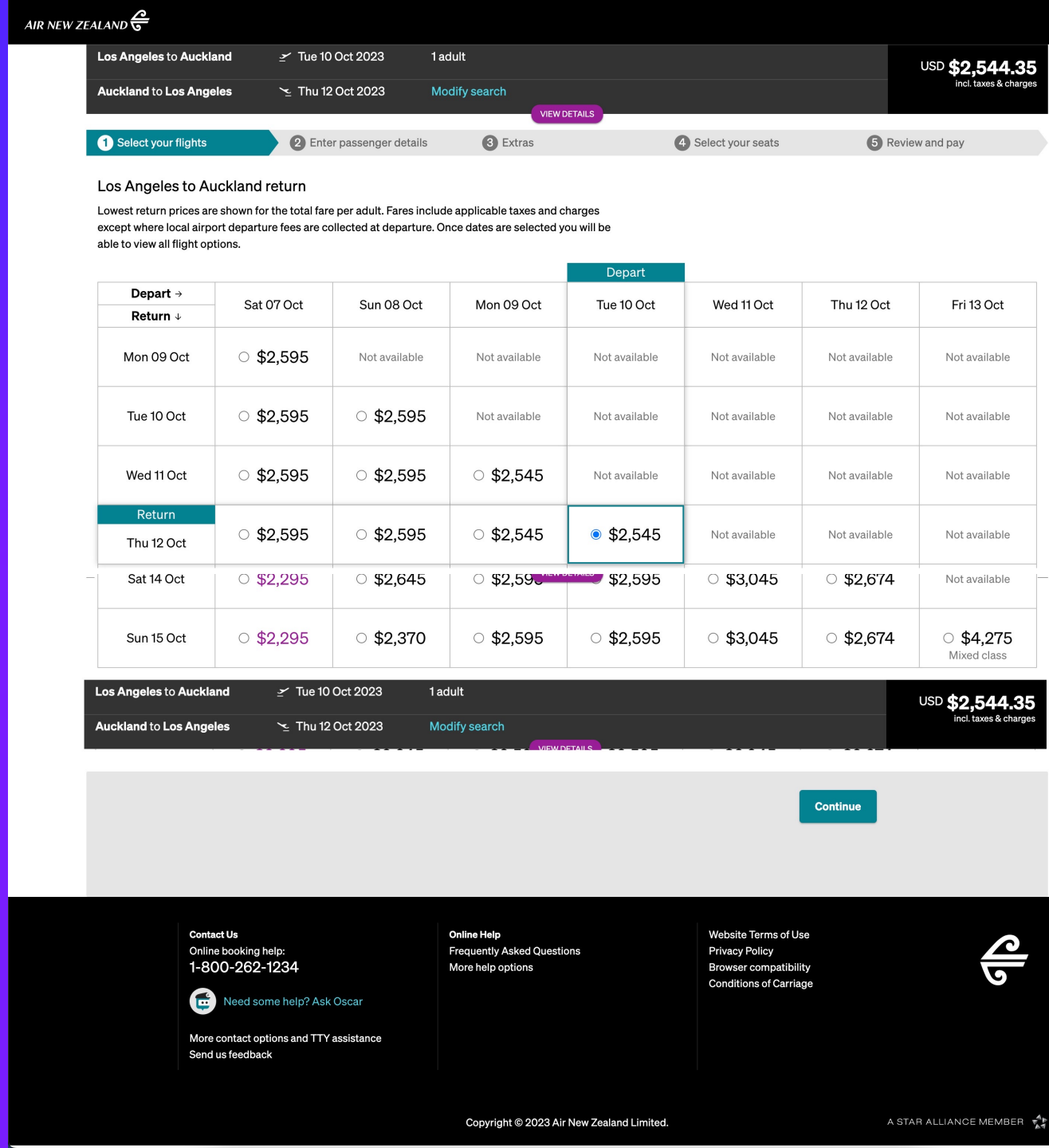
“Trapped Travelers”

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



“Trapped Travelers”

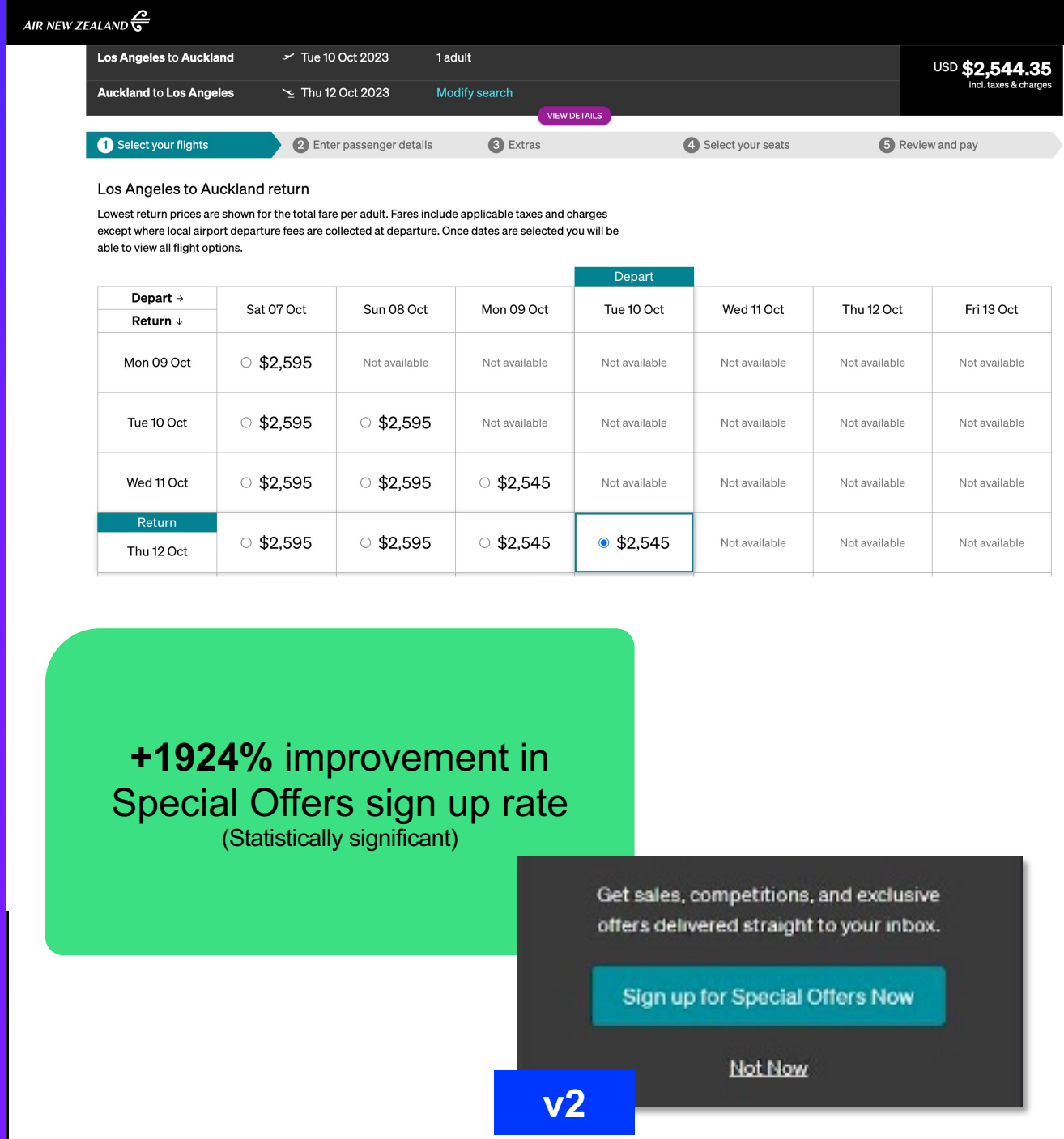
Consideration	Research phase
Curiosity	Price
Condition	Discounted price
Context	High flight-search rate, low session conversion rate



“Trapped Travelers”

Test Hypothesis

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



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

v2

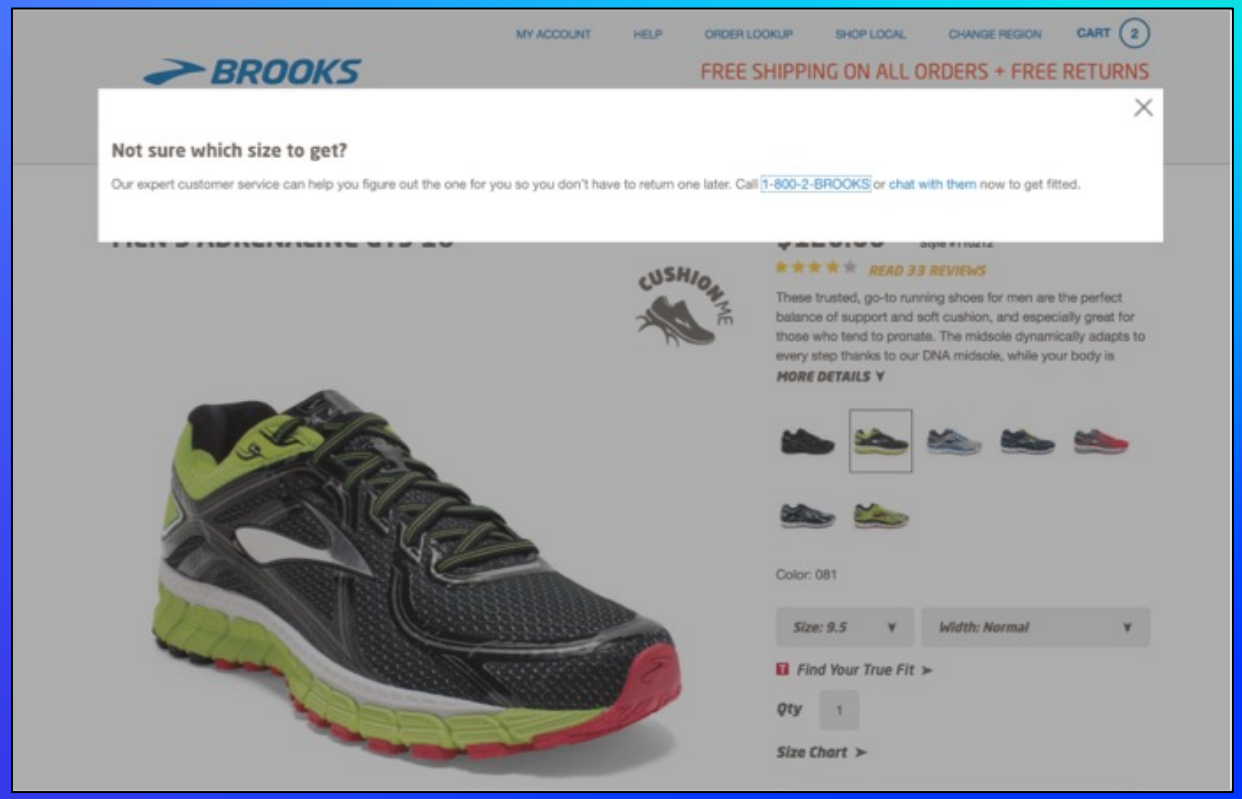
Unlock true customer understanding using the 6C Strategy (cont.)

Context

What situational/historic data creates important nuances?

Conceptions

What would create a positive/negative influential emotion?



Source: https://www.forrester.com/blogs/unlock-true-customer-understanding-the-power-of-what-and-how-data/

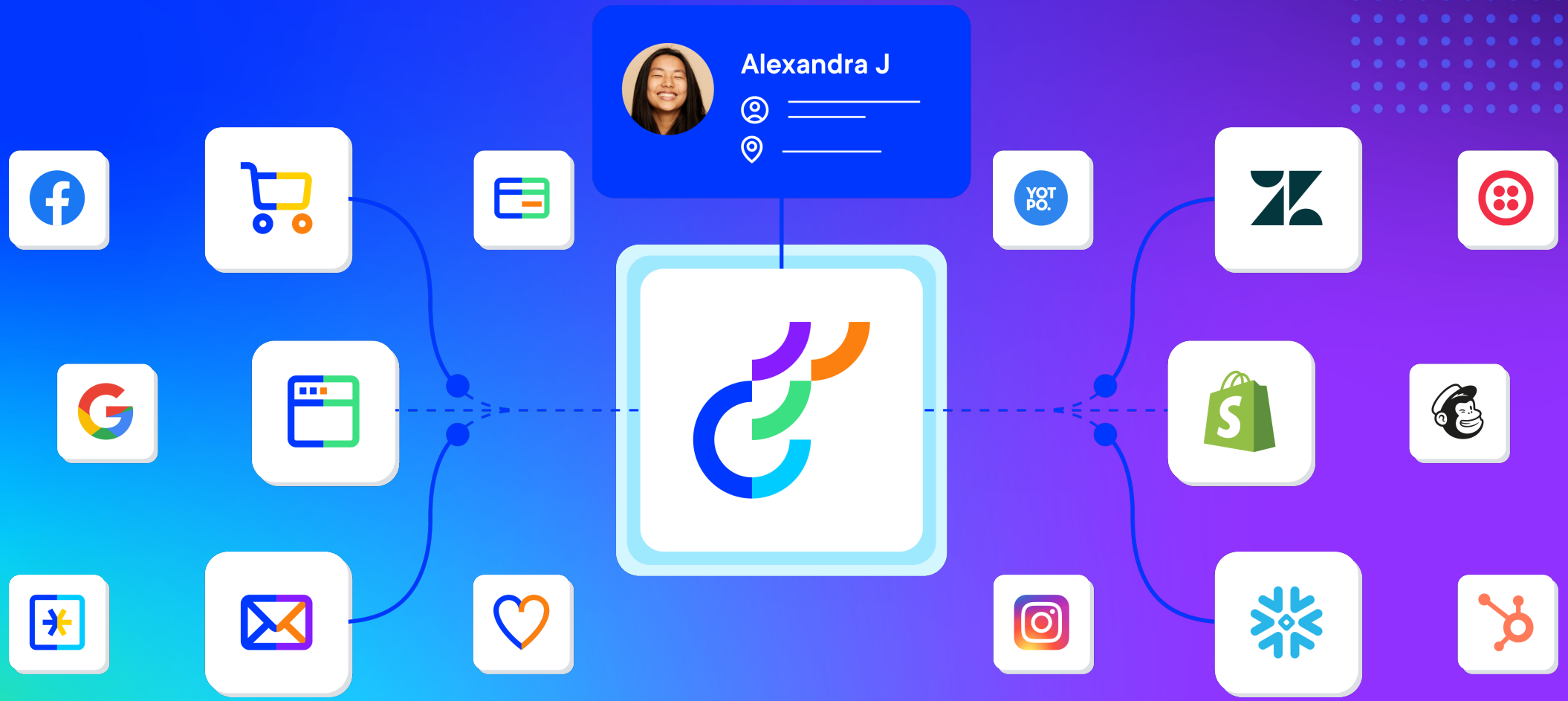
02

The 3-step process:

Harmonize, Understand, Personalize

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)

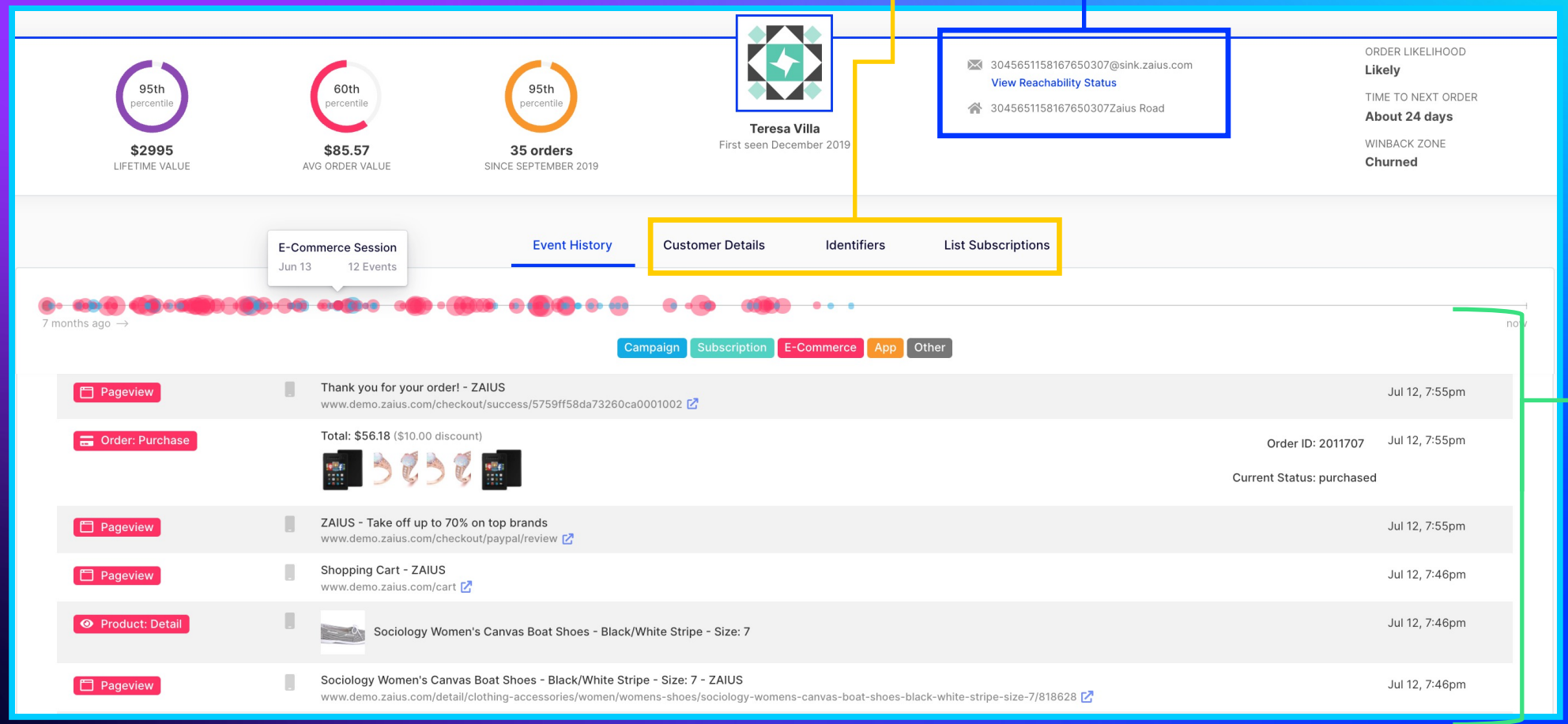
Connect Platform NEW
(build your own connectors)

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

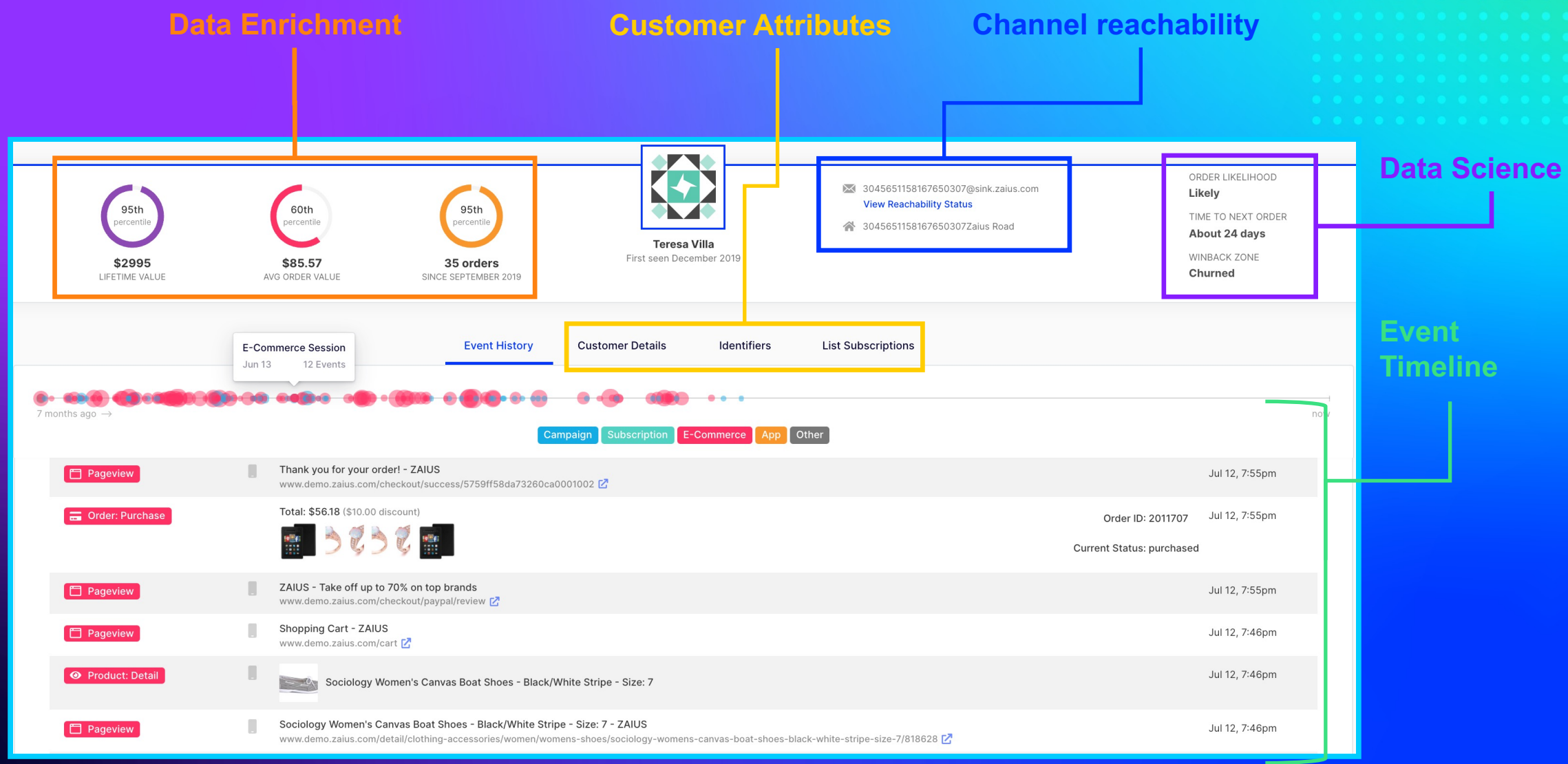


Step 2: Understand your data

Get a unified profile view

Get auto-generated customer observations and insights

Step 2: Understand your data



Step 2: Understand your data

Get a unified profile view

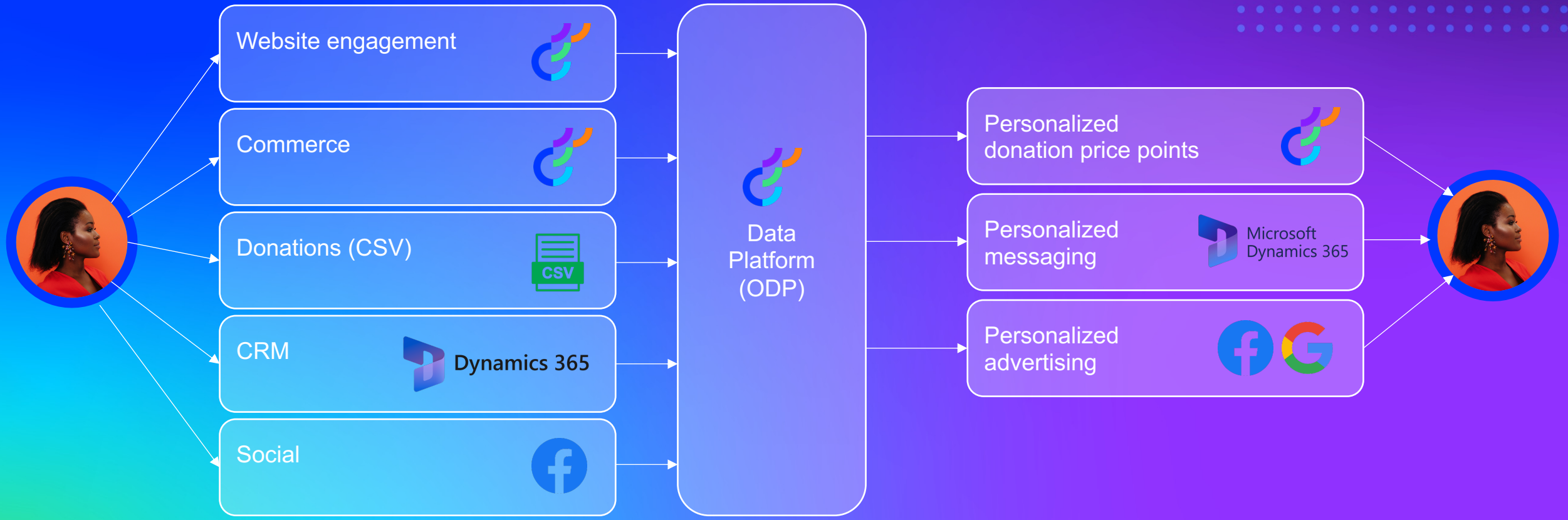
Get auto-generated customer observations and insights

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			

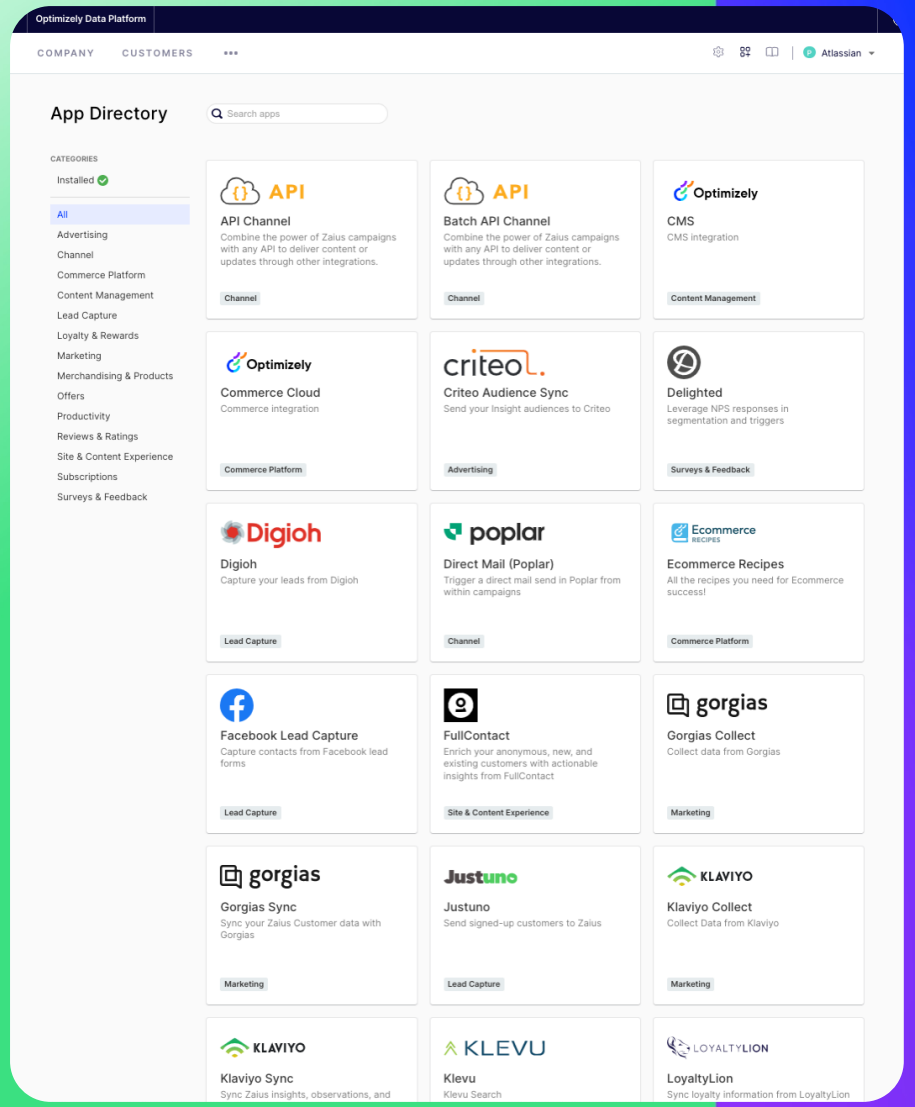
Not-For-Profit builds a case for a Customer Data Platform implementation



03

Optimizely Connect Platform

Deep Dive



What is the Connect Platform?

- Single point of integration for Optimizely's DXP and 3rd 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 fil
   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_ewx5tHIndsJiwfw
    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 prepa
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

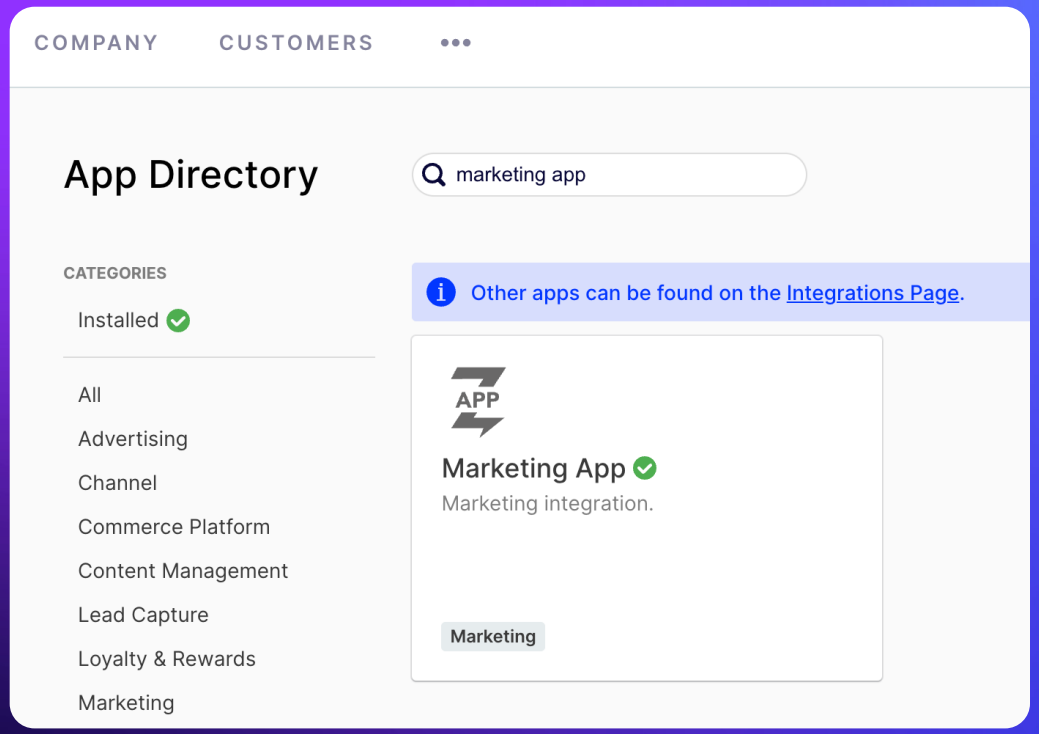
- ocp directory publish marketing_app@0.0.0-dev.1
- ocp directory install marketing_app@0.0.0-dev.1 <tracker-id>

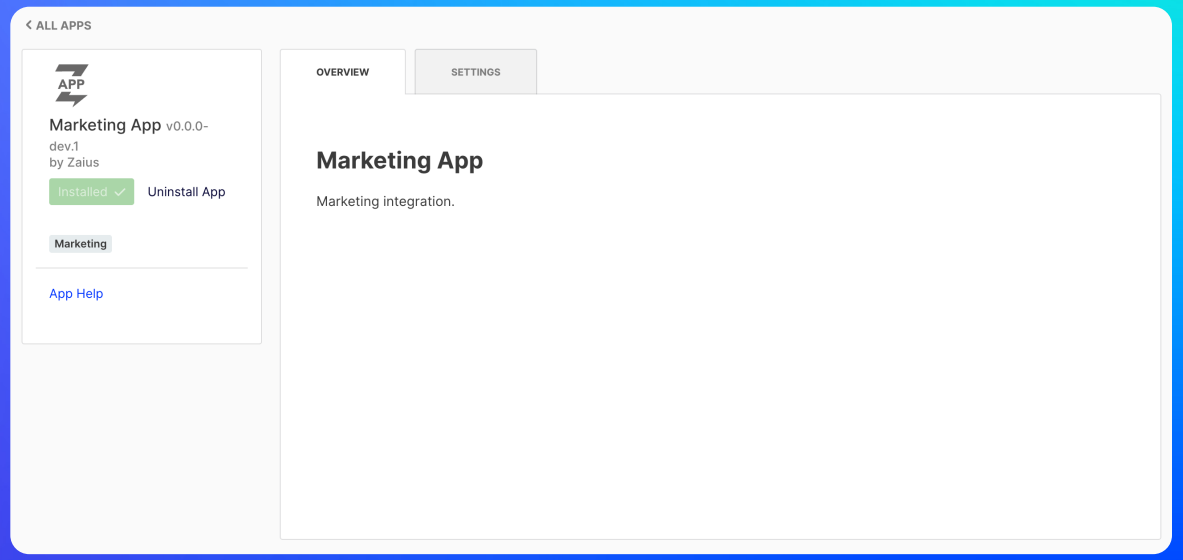
```
Verifying upload constraints...
Existing version not found...
Packaging files in /Users/simon.chapman/my-new-marketing-app/marketing-app
.eslintrc.js
.gitignore
app.yml
assets/directory/overview.md
assets/docs/index.md
assets/icon.svg
assets/logo.svg
forms/settings.yml
jest.config.js
package.json
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.
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.
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





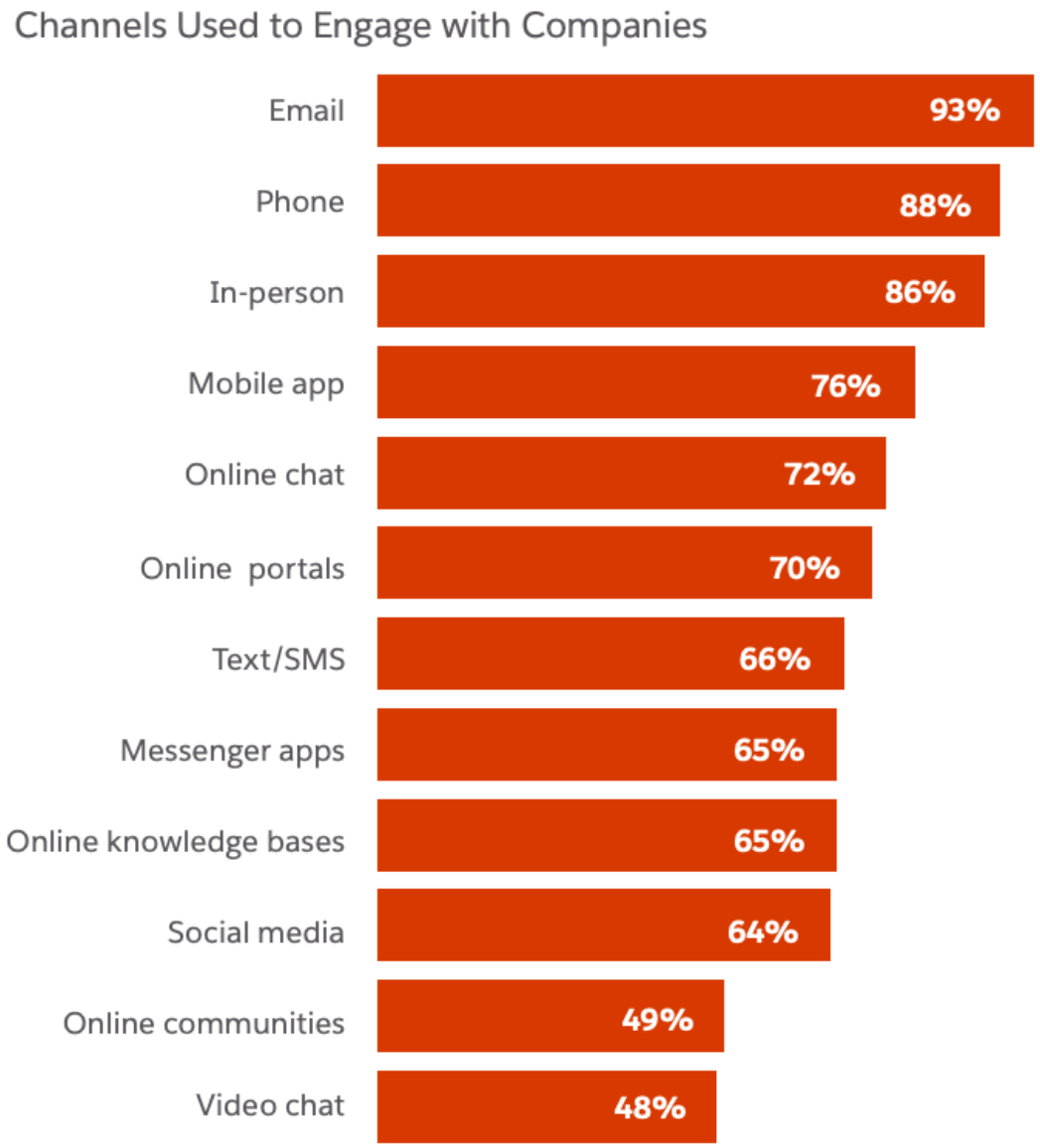
04

Demo

Let’s see it in action

Customer Engagement is Omni-Channel

- Salesforce Reseach



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.

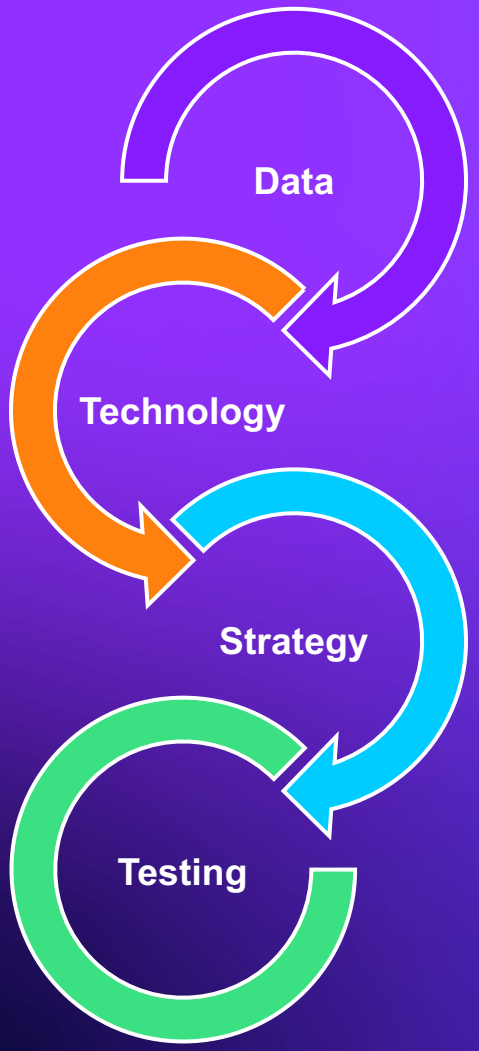
Customers are likely to make repeat purchases with companies that offer excellent customer service.

- 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!