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Personalization to Drive Member Engagement
Tips for an Effective Strategy

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Hi, we're Sandstorm.

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Accessibility-certified, digital experience technology agency for **purpose-driven brands**

- **25+ yr** digital experience design agency
- **20+ yrs** developing **UX for associations**
- **CPACC** (accessibility)
- **DEIB** certified (diversity, equity, inclusion, belonging)
- **WBENC** certified (women-owned)
- **ASAE + Assn Forum** speakers
- UX practice started by **Ph.D in human factors** in 2006
- **Yes, And**… philosophy

Drupal™

WORDPRESS

STRATEGIC
PANTHEON
PARTNER

Acquia
CERTIFIED
CLOUD
PRO

Scrum Alliance
CSPO
CERTIFIED

AIHR | ACADEMY TO INNOVATE HR
Certified DEIB Specialist

IAAP
CERTIFIED
CPACC

certified
WBENC
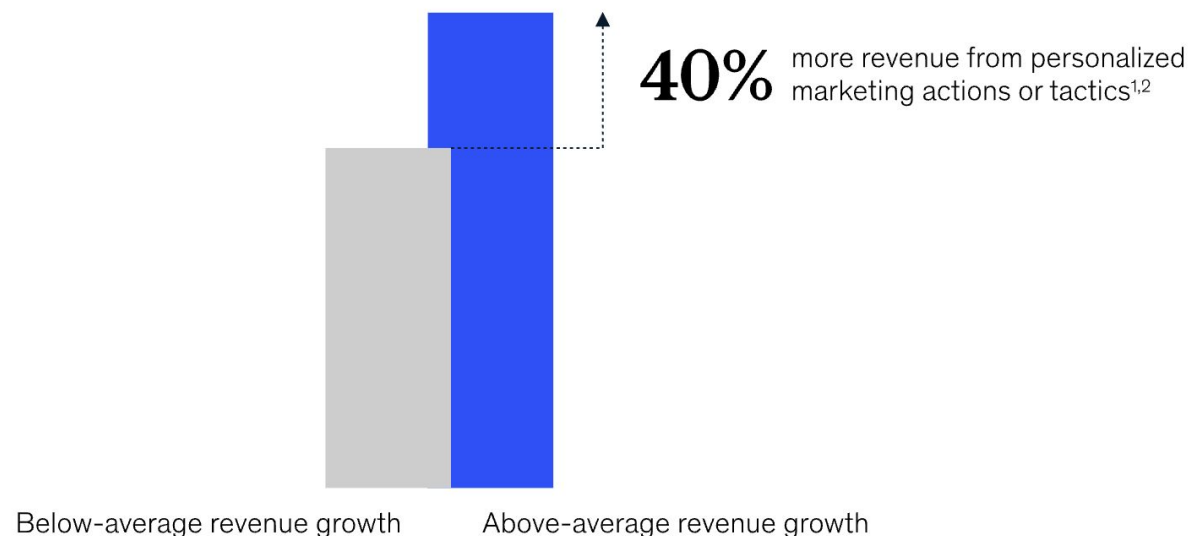WOMEN'S BUSINESS ENTERPRISE

Today We'll Cover

- **How to create a strategy** and personalization matrix

- **Choosing areas to personalize** that your visitors will value

- **Pitfalls to avoid**

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FUN FACT

Companies that grow faster **drive 40% more of their revenue from personalization** versus their slower growing counterparts.

Companies that capture more value from personalization grow faster.

40% more revenue from personalized marketing actions or tactics[1,2]

Below-average revenue growth   Above-average revenue growth

[1] Companies divided into two groups based off past-year revenue growth; top half classified as higher growth and bottom half as lower growth.
[2] Question: "What % of your revenue comes from personalized marketing actions/or tactics?" Possible responses: values from 0 to 100%.
Source: McKinsey Next in Personalization 2021 benchmarking survey, 2/7–2/14/2021 (n = 20) sampled among consumer companies without direct consumer relationship (eg, CPG)

4 Tips for an effective personalization strategy

1 Start with strategy.

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Elements of your strategy

- Purpose
- How you will measure success
- Content to differentiate
- Attributes and data sources
- Segments
- Areas to personalize

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Example Strategy

Purpose

We want to improve engagement an increase conversions by improving the relevance of content presented to users.

Measuring Success

✓ **Increase in engagement metrics**

   Average session duration, average pages per session, engagement rate

✓ **Increase in user behavior events/conversions**

   Increase in course registrations, membership inquiries

✓ **Increased traffic to member resources**

   Users, sessions, views etc. to member-only content

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Example Strategy

Content to Narrow or Differentiate

- **Membership/designation path selection**
  Provide information relevant to their current status (e.g. steps for a candidate to complete towards designation)

- **List of courses**
  Many courses have sequences. Highlight the next logical course based on recent registration.

- **In user interviews, we learned that can be a tendency towards "inspeak" that makes newcomers feel less welcome.**
  Modulate language based on familiarity of audience.

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Example Strategy

Attributes and Data Sources that Can Drive Segments

From the Association Anywhere user profile
- Membership status
- Membership type
- Location

From the AMS purchase history or LMS
- Course registrations (from AMS)
- Course completions (from AMS)

From the browser
- Visits to a particular page (e.g. Become a Member)

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Example Strategy

Segments

Given the priority areas for content differentiation, we will start with these 5 segments which can be derived from Association Anywhere user profiles.

1. University Students
2. Logged in non-members (prospective candidates)
3. Candidates
4. Designee
5. Instructors

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Example Strategy

Areas to Personalize

Since our initial segments rely on users logging in, we will focus on the pages that are most viewed by logged in users:

- Homepage
- Member Dashboard
- Find a Course

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2 Then make a plan.

Example Personalization Matrix

Segment	Member: Designee	Member: Candidate	Logged In Non-Member	Logged Out
Goals				
Tasks				
Homepage				
Hero				
Membership Callout				

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Example Personalization Matrix
Member: Designee

Goals

- Connect with other members for referrals and deals
- Utilize membership discounts and benefits
- Feel a sense of belonging to an elite group

Tasks

- Visit members-only sections and forums
- Find and connect with other designees
- Register for courses and events
- Renew membership
- Access templates and industry tools

Homepage

Hero text
Update text with a brief welcome message tailored for designees and call to action: Access Member Tools & Resources

Membership callout
Title: "Unlock Your Membership Value"
Highlight key membership benefits and discounts.
Links to "View all my designee benefits"

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For all this to work, content needs to be updated for multiple segments. **Most of us have a hard enough time keeping content updated for ONE audience.**

Focus on the easy things that are highest value.

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High impact
starting points

✓ Homepage (hero)
✓ Page that follows login
✓ Featured product, event
✓ Global site alert

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3 Center your **visitors' needs**

71% of consumers expect companies to deliver personalized interactions.

ASK YOURSELF (OR BETTER YET, THEM)

What will **save time** for your visitors?

What will they **appreciate**?

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All

Search Amazon

EN Account & Lists Returns & Orders 0 Cart

All Rufus Same-Day Delivery Medical Care Prime Video Buy Again Groceries Household, Health & Baby Care Pharmacy Amazon Home Subscribe & Save Amazon Basics janna's Amazon.com Big deals coming soon

Pick up where you left off

COMIN 4 FT Halloween I...

Angmart 2PCS Hallowee...

Newwiee 2 Pcs Scary Ha...

Tingjoo 2 Pcs Scary Hall...

See more

Keep shopping for

Video projectors
1 viewed

Landscape path lights
1 viewed

Outdoor statues
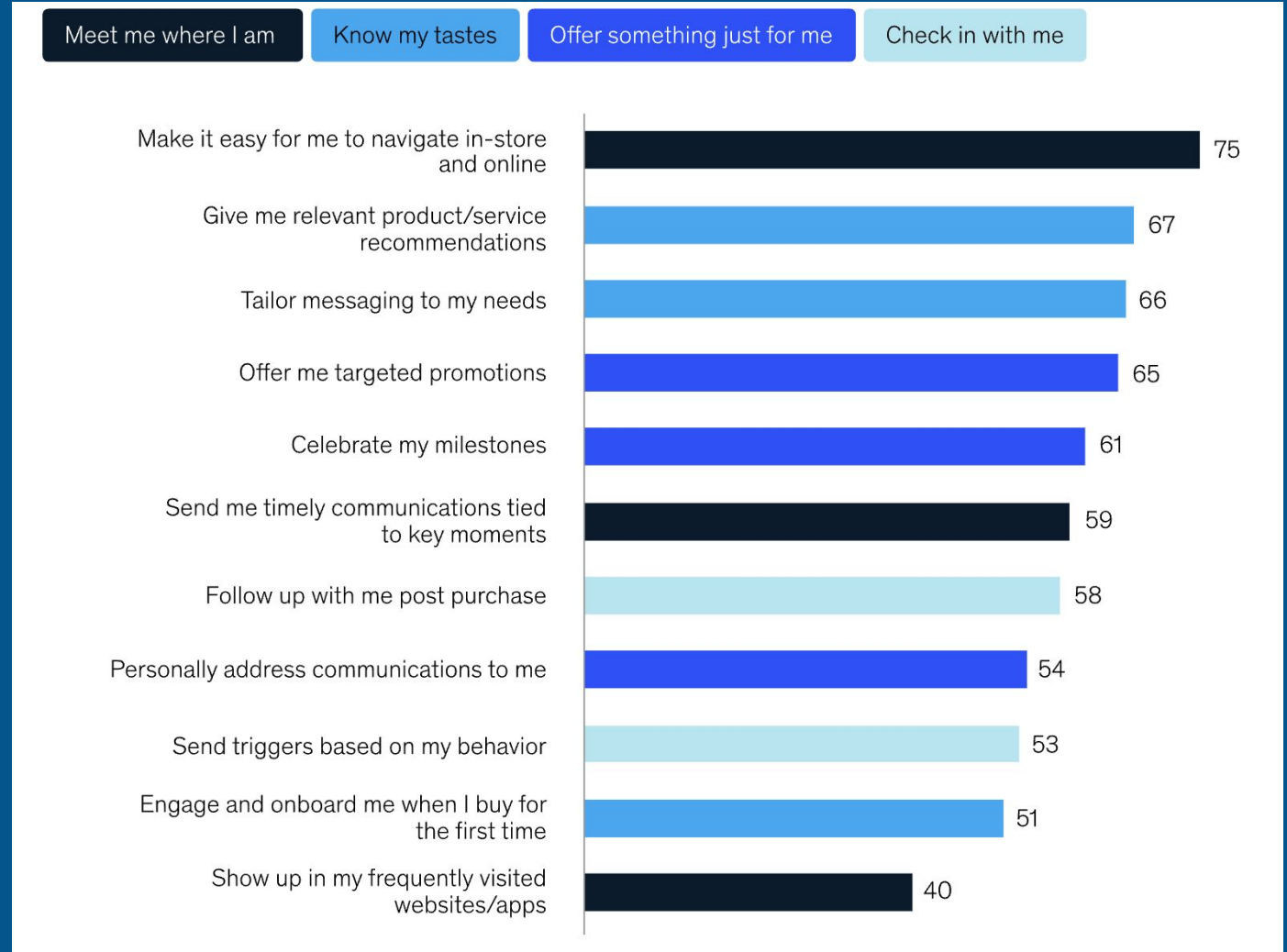2 viewed

Water bottles
2 viewed

View your browsing history

Buy again

More in Buy Again

BRAND STRATEGY + CREATIVE + UX + WEB DEVELOPMENT

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CONSUMER EXPECTATIONS

Make it easy to do business with you.

| Meet me where I am | Know my tastes | Offer something just for me | Check in with me |

Category	Value
Make it easy for me to navigate in-store and online	75
Give me relevant product/service recommendations	67
Tailor messaging to my needs	66
Offer me targeted promotions	65
Celebrate my milestones	61
Send me timely communications tied to key moments	59
Follow up with me post purchase	58
Personally address communications to me	54
Send triggers based on my behavior	53
Engage and onboard me when I buy for the first time	51
Show up in my frequently visited websites/apps	40

https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-value-of-getting-personalization-right-or-wrong-is-multiplying

Focus on the top of the content funnel areas first

Homepage
High volume content

- Courses
- Resources
- Events

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4

Be **transparent**.

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Personalized content is most helpful when you know it is being personalized (and how).

✓ Events Near You

✓ Recommended Because You Took **X** Course

✓ Other **X** Members Like **X**

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Related to items you've viewed See more

Gift ideas inspired by your shopping history

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Don't be **creepy**

We'll examine lots of tools and data sources that provide **information that you can use** to drive differentiated content.

Focus on the elements your **visitors expect you to know** about them.

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Highlight, don't hide

Our assumptions about visitors are not always right and some wear more than one hat.

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Key Takeaways from Today's Session

- Start with a strategy.

- Make a plan that focuses on high impact areas first.

- Center your visitors' needs.
  - What will save them time? What will they appreciate?
  - Where do you have high volume content you can help then narrow?

- Indicate content that is personalized (and how).

- Focus on data visitors expect you to know about them.

- Highlight without hiding.

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In Tomorrow's Session We'll Cover

1. Data sources
2. Tools to consider
3. A homework assignment

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Let's connect!

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Download the presentation and other resources here:

sandstormdesign.com/personalization

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