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Personalization to Drive Member Engagement

Data Sources, Tools and Plans for Implementation

ACGI Solutions Summit

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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

In Yesterday's Session We Covered

1. **Best practices** for personalization
2. **Developing a strategy** to maximize value
3. **Creating a plan** for content differentiation and management

Today We'll Cover

1. Data Sources
2. Tools to Consider
3. Your Homework Assignment

1 Data Sources

Two excellent data sources

1. **User profile data** for logged in users
2. **Browser-based** data

FUN FACT

76% of consumers get frustrated when they do not have a personalized experience.

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

Association Anywhere®

User Profile Data

- Membership status
- Membership type
- Location
- Professional title
- Products purchased
- Areas of interest/focus
- Job function
- Council/special interest group membership

Browser Based Data

- UTM parameters
- Cookies
- Pages viewed
- Filters selected
- Language
- Geo-location based on IP address

Mapping Attributes to Segments

To ensure differentiation is sustainable to maintain and meaningful for your visitors, you'll group attributes into segments.

- A discreet location → Region
- Membership type → Membership segment

* Example

Membership Type	Membership Segment for Personalization
Candidate Membership	Candidate
Designee Membership	Designee
Faculty Membership	Faculty
Fast Track Membership	Candidate
University Fast Track Membership	Student
Student Membership	Student
International Candidate Membership	Candidate
International Designee Membership	Designee
International Faculty Membership	Faculty
International Fast Track Membership	Candidate
International University Fast Track Membership	Student

2 Tools to Consider

Tools Have 2 Jobs

1. Manage differentiated content
2. Detect and collect data

Managing Differentiated Content

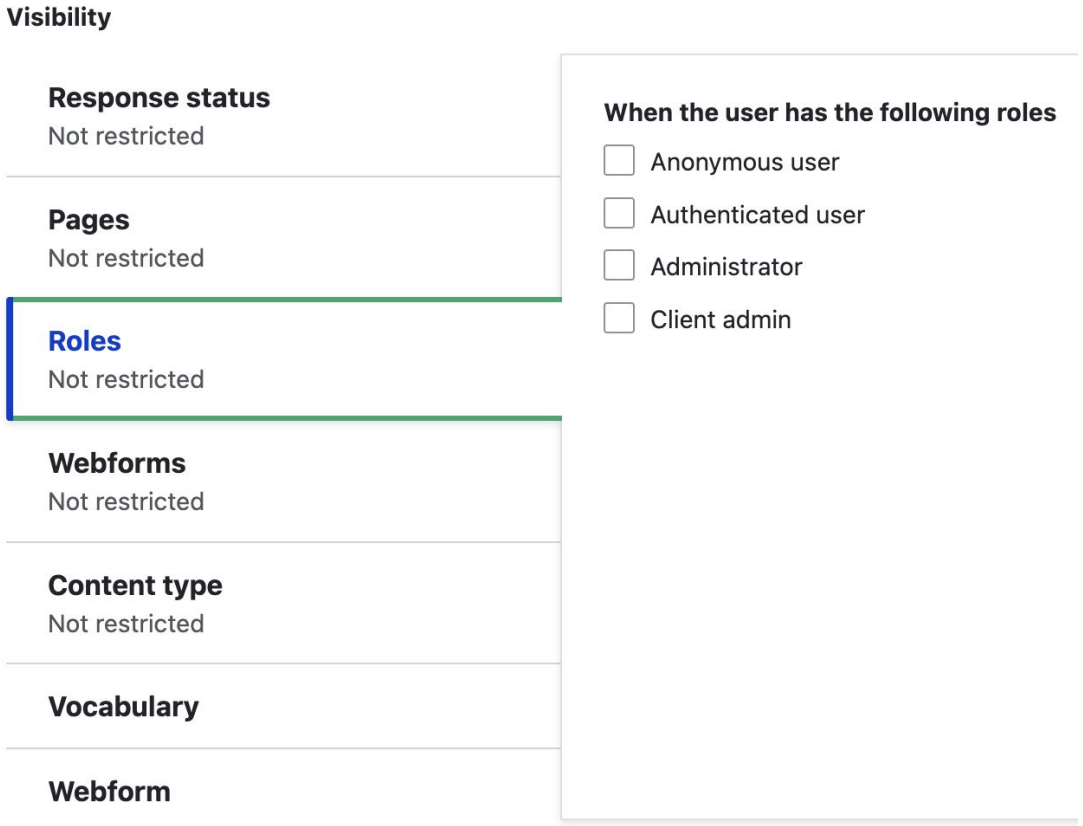
In most cases, **you will manage content for your defined segments within your CMS.**

Depending on the CMS, this may be part of the core capabilities or accomplished via plug-ins/add-ons/modules.

- **Open Source**
  - Drupal
  - WordPress
- **Proprietary** (Sitecore, Sitefinity, Kentico, Adobe)

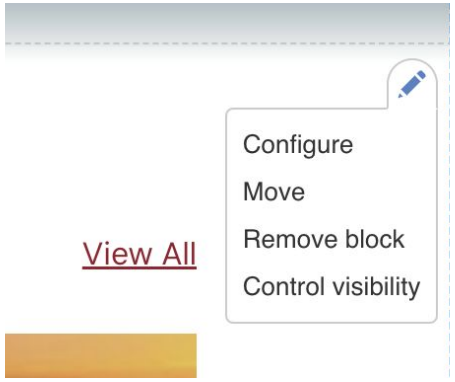
For Drupal: Core Capabilities

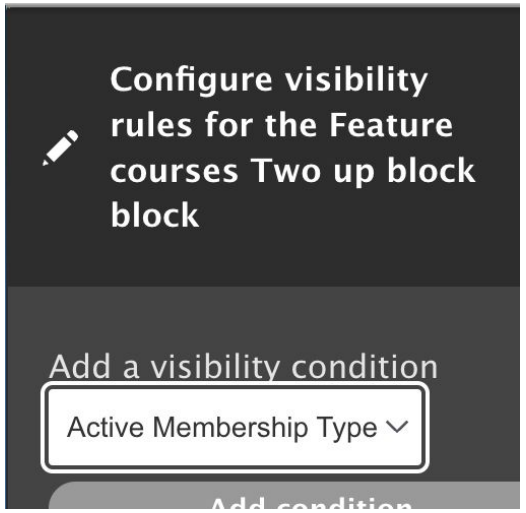
User data can drive the assignment of roles. Roles can natively be used for the conditional display of blocks.

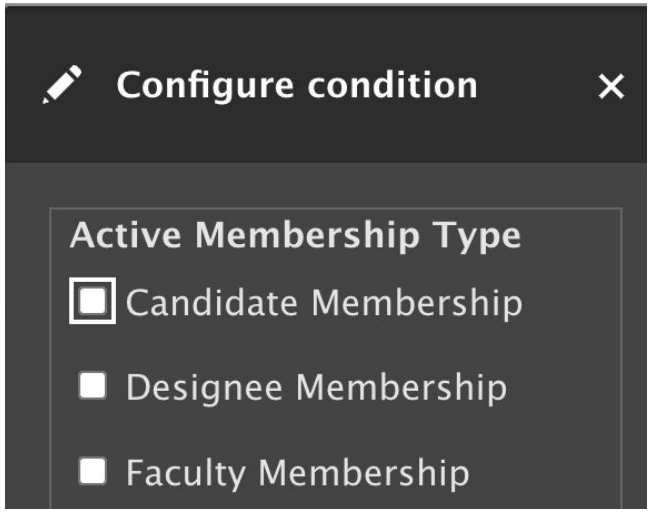


For Drupal: Smart Content

Smart Content is a suite of contributed modules that gives you a way to set visibility conditions for any given block on the site (including Layout Builder blocks) tied to browser-based events or other user attributes.

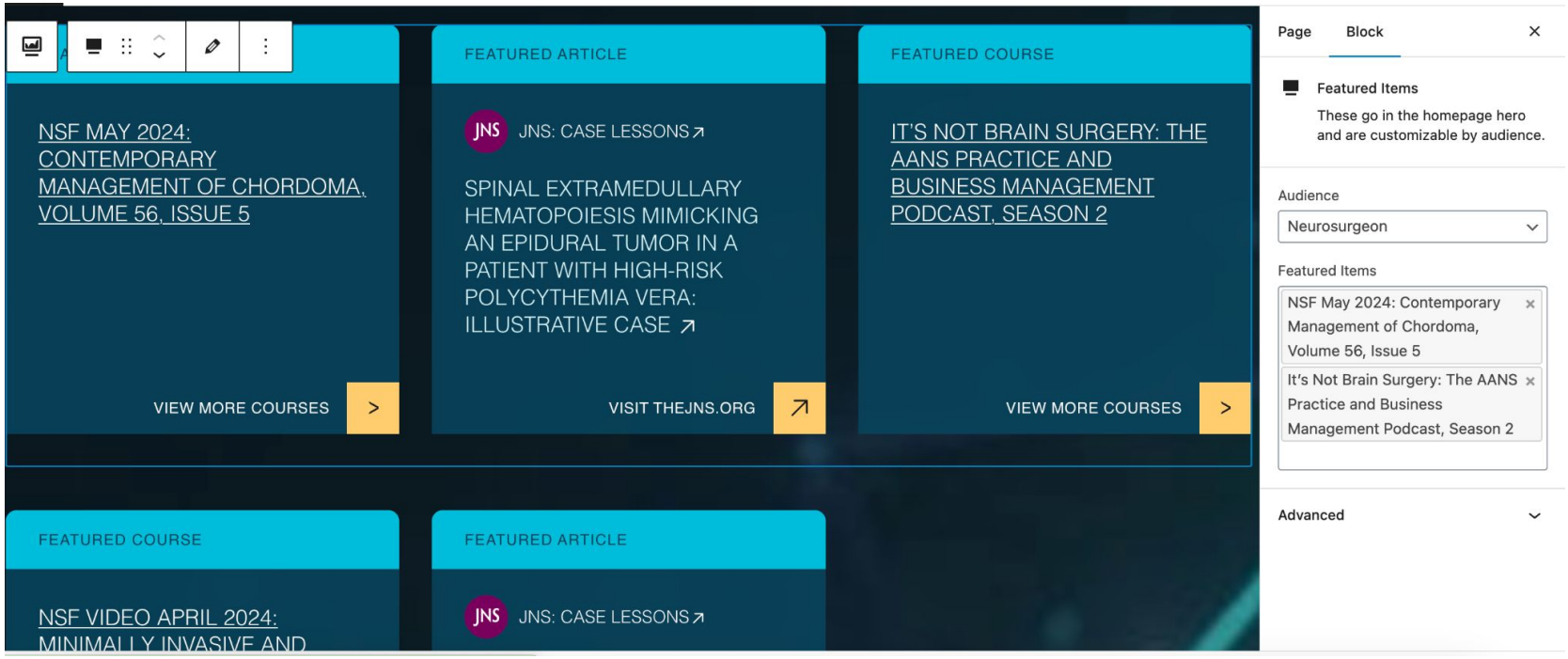






For WordPress

In this example we used an **Advanced Custom Fields** block that checks the user's audience. The user's audience is set by checking membership type when they log in. And we customized the theme using **Timber functions and Twig**.



WordPress Plugins

If So

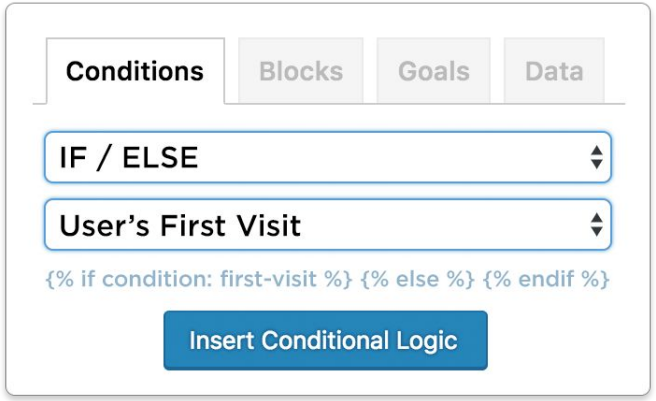
[if-so.com](if-so.com)

- **Paid**
- Select a condition, choose what to display if the condition is met, paste the trigger's shortcode on your page
- **Conditions**: Geolocation, UTM parameters, pages visited, language, device type, time, new vs. returning visitors, cookies, user role, and more

Logic Hop

logichop.com

- **Paid**
- Supports a similar list of conditions



Enterprise Proprietary Options

These proprietary CMSes emphasize their personalization capabilities as part of their core functionality. Both tend to be more expensive and feature-rich than the mid-market alternatives. They also require more specialized training.

Adobe Experience Manager	Sitecore
• Targeting based on user behavior • AI-driven personalization (Adobe Sensei) • Integrated with Adobe Marketing Cloud, Adobe Analytics and Target • Best suited for large enterprises needing extensive personalization	• Real-time personalization based on user data • Machine learning with Sitecore AI • Content targeting across multiple channels • Advanced CRM and data integration • Suitable for companies looking for deep marketing automation alongside personalization

Mid-Market Proprietary Options

These proprietary CMSes also emphasize their personalization capabilities as part of their core functionality. Both options are more affordable but lack the AI features.

Sitefinity	Kentico
• Personalization based on demographics, behavior, and other criteria • Personalization via content variations and touchpoints • More user-friendly and accessible to marketers • Less AI-driven than Adobe and Sitecore	• Personalization based on user behavior and profile data • Omnichannel delivery • Simpler, manual setup • Lacks advanced AI and machine learning capabilities seen in Adobe and Sitecore

DETECTING AND COLLECTING DATA

Make your website better acquainted with your visitors by integrating **AMS data** and optionally using a **customer data platform (CDP)** to aggregate data.

Association Anywhere

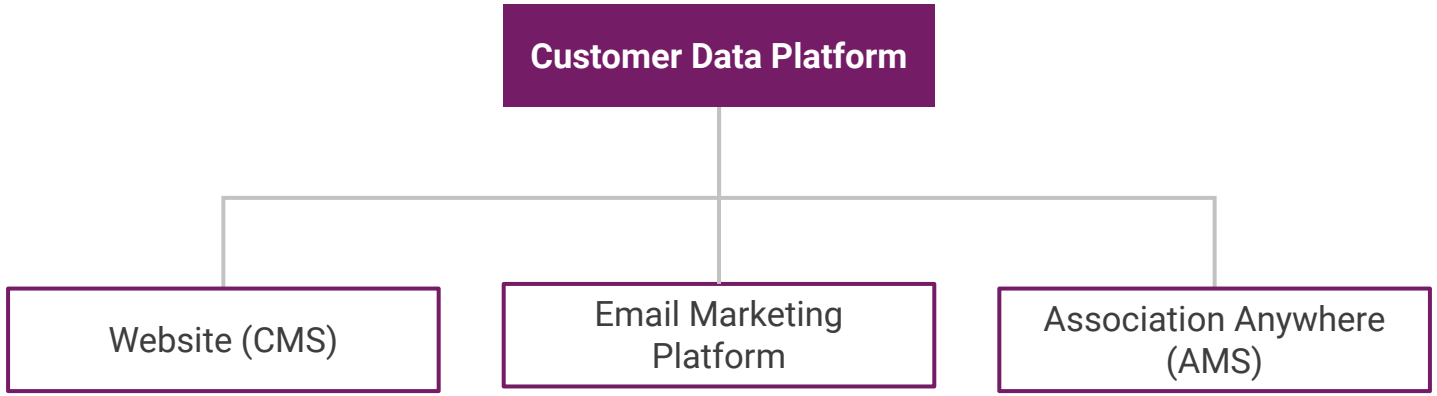
Association Anywhere is **rich with data to drive personalization.**

This is the **data your members specifically gave you and expect you to base their experience on.**

Through SSO and/or other user integration, **you can pull in key profile attributes** (especially membership type) to your CMS.

Customer Data Platforms

A **customer data platform (CDP)** is software that collects and unifies customer data from multiple sources into a single, comprehensive customer profile.

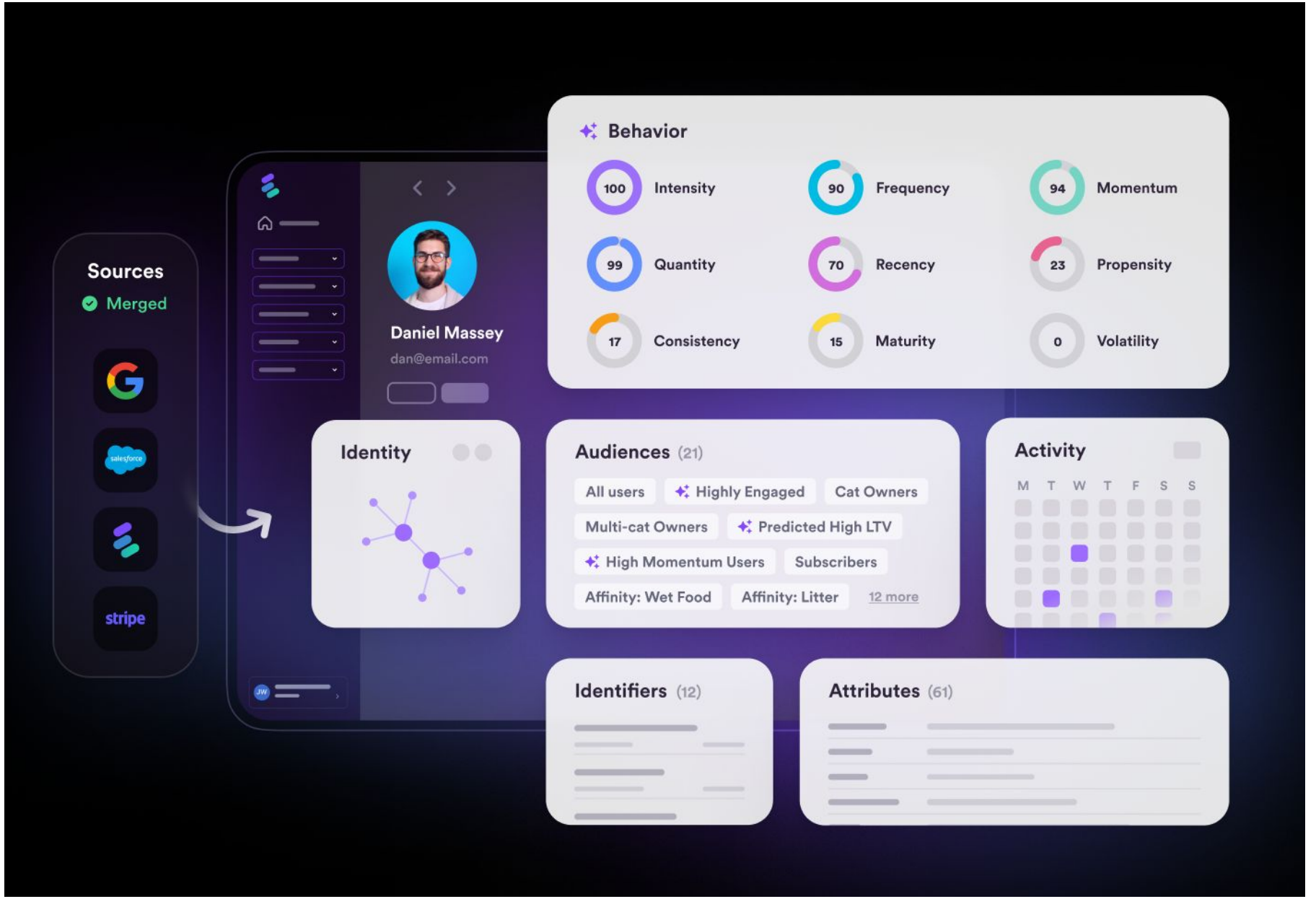


Lytics

Lytics is a customer data platform that provides personalized experiences for site users.

Feature Highlights

- Good support for **Drupal** via Smart Content and **WordPress** via Lytics Personalization Engine
- Includes a **free tier**
- Collects data and **also provides widgets** for inserting personalized content
- Can **improve targeting for paid ads**(via Google, social, etc.)



lytics

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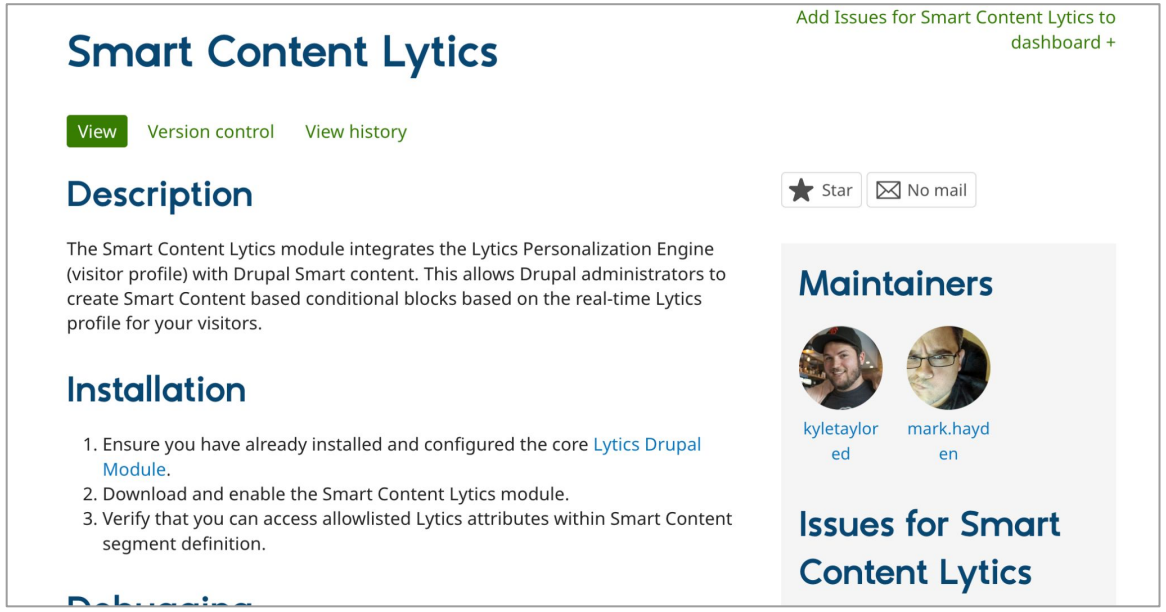
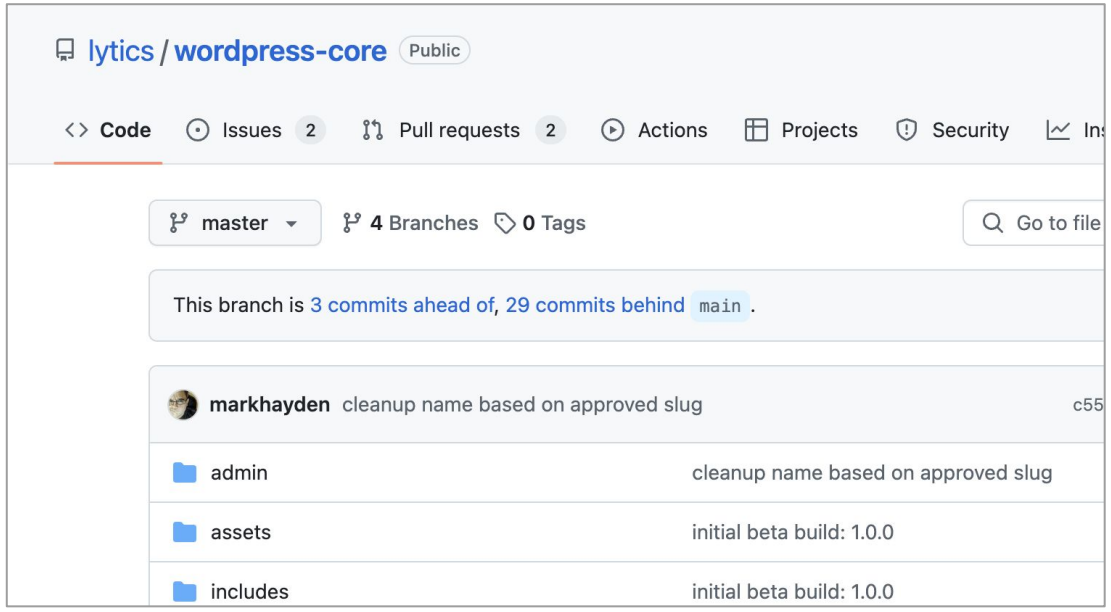
Lytics

Segments to drive conditional blocks or Lytics widgets are then available within Drupal (via Smart Content Lytics module) or WordPress (via Lytics Personalization Engine on Github).





3 Your Homework Assignment

AVOIDING PARALYSIS

With so much to consider, **forward progress** can be challenging.

Homepage Hero

Differentiate the text for a logged in member.

Why?

- **Good proof of concept** for differentiating content based on logged in user data.
- It’s rude to continue talking to your members like they are strangers.

Sitewide Alert

Remind users to pay their dues or update their profile.

Why?

Easy to track ROI

Data Collection

Add Lytics (or similar) tags to the site and observe their segments.

Why?

Gain another perspective on segments and set the stage for additional steps.

Key Takeaways from Today's Session

1. Use both **logged in user profile data** and **browser-based data** to drive segments.
2. Consider **membership type/status, areas of interest, geographic location, and job type**.
3. Select tools to gather data and manage differentiated content: **ACGI Engage, Lytics, SmartContent**, and more.
4. **Commit to getting your feet wet with easy, high impact steps**: separate homepage hero text for logged in members, dues reminder site alert, and adding initial tracking.

Let’s connect!

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Download the presentation and other resources here:

sandstormdesign.com/personalization

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