**Personalisation – does it uplift engagement or is it creepy?**

Presented by Dom Yeadon; sponsored by Data Harvesting.

**Introduction**

Dom introduced himself and Ben, told the group that he would welcome participation and invited questions during and after. He also asked the group to photograph slides if they’d like to. The aim of the session was to give us ideas to take back to our institutions.

He highlighted the importance of using personalisation in an informed and intelligent way. A slide showing an engagement ‘line’ was shown - If we think of engagement as something we want to keep going up, what should it look like? If we get the recipient’s engagement right, the line should go up. If we get it wrong it goes down. The engagement line is calculated from observable behaviours and is a useful metric. Engagement score measures personalisation.

**Creeped out vs engaged**

‘Chloe’ has opened an email that got personalisation completely wrong; the institution didn’t intend to. Looking at thoughts of Chloe: “Who is this from? I don’t trust this. If I click will I get hacked? Where did they get my data from? What else they know about me? Am I in danger? This is creepy”. All stems from one accidentally badly personalised email.

We would like her to be engaged, with thoughts such as: “I know this uni and trust them; I trust what they say; links take me to useful places; take good care of my data; this is data I shared with them; this is safe; this is highly relevant”. This should be the ultimate aim of any marketer

**Bloopers**

Dom asked universities to raise their hands, with the inference being that they had committed bloopers. He then confirmed that he was not including university bloopers as examples in the presentation and would use corporate ones instead.

**Some examples:**

1. Not hooked up the data to the creativity at the front end of the email. All start with Hi/Dear “Fname”. Commonplace error.
2. Magicbeans example. Similar issue - everyone is called ‘Kate’ in the email. Assumption here is that the marketer, Kate, started by hard coding her name at the top then didn’t add the merge tags.
3. Amazon baby registry example. More serious, Sent out email about baby registry to thousands of subscribers most of whom didn’t have baby registry or weren’t parents. Data segmentation entirely incorrect.

**Looking at the cost of these human errors:**

1. Feel I’ve been processed, forgivable – low level impact
2. Kate – puzzled then concerned, Is Kate reading an email destined for me? Is this indicative of a greater problem across the database? Thinking about it that day bit not the next, got me thinking.
3. Significant. Mix of confusion, fear and anger. Clumsy and upsetting. Amazon should know better. Anger, will talk about it at home, work and online. Will remember this bad experience for a long time.

**What would have prevented these?**

1. Good data
2. Trusted technologies
3. Checklists
4. Trained staff – not hard to do but often overlooked
5. Quality checks – make sure recipient is checking it (e.g. proof sends)
6. Enough time – don’t do things last minute

**Dom invited questions from the group.**

Someone wondered what percentage of errors would result from members of staff working while on the road in hotels and being tired and working too hard at night.

Dom responded that if you have been trained and know there is a process to follow this is the best safety net, and there is a need for a mechanism or list, and training to use a checklist. Some mistakes will still inevitably happen though.

**Evolution of personalisation**

Personalisation has evolved over time from the ‘dark ages’ to where we are now.

We have gone from paper records, to mainframes without our access, to personal computers, to handheld devices - near ubiquitous devices. The errors and opportunities for slips will become increased and accelerated without safeguards in place.

‘Chloe’ is the same person when dealing with brands and her education. She is enjoying a highly relevant and personalised experience with her brands. Brands want sales, while institutions want enrolments and engaged learners. Both require trust to maximise personal data they hold in the most relevant and personal way. Lots of elements she will experience with her favourite brands will come in to education marketing.

Dom suggested that the terms ‘consumer’ and ‘student’ are now interchangeable. Some of the best brands and tactics used to bring loyalty and advocacy can be used by institutions for students. The best research in this area has been from consumer brands, but education is catching up fast.

**Consumers expect a relationship -** Students won’t be surprised that we are using the data, but may be by how we use it.

**Be relevant** – Students trade their data and expect highly personalised communications as a result of this.

**66% find personalisation acceptable** (Source: Experion) - 7% thought it was ‘cool,’ 14% said they expect it, 66% find it acceptable as long as it is relevant to them and it’s from companies they recently purchased from.

From the first enquiry we have the data, then the tools to make each personalised journey very relevant.

**Checklist for success**

Dom suggested that there are 6 things we need to do.

**We have to start with the data** – Questioning the validity and richness of the data. Name address, permissions, base level information the university needs.

**Next level up is interests and applications** – What subjects and courses? General interest from early on in schools? When they are in the UCAS system you get their course code. Some know what they want to do, some need support and encouragement. Mapping the funnel of data – collect and store it. Should have access to information on a booking form to personalise communications from this afterwards. Need to track it all. While subject can be challenging, it will give and increased level of dynamism.

**Student’s activities** – Deep level. What they do and don’t do. Opens, clicks, bookings, applications - marketers need to be able to pick up this rich data. The system needs to be intelligently updating their engagement score, which is calculated based on activity data. Can then see students who are lapsing or close to making a decision. Eg. Cohort whose interest is lapsing. Without seeing the engagement score the university wouldn’t have visibility of this, so couldn’t know to send a resuscitation campaign.

**Create personas to group like-minded students –** Not all students are the same. However, if we go too granular to fast, it can be too much. Suggested trying one persona per faculty, as it’s different speaking to someone in life sciences to engineering. There should be different trigger words, different calls to action - allows us to hit metrics for relevance. Without personalisation we would be treating 2 very different personas the same. One email can’t hit both at the same time. Dom suggested allowing faculties one persona to start with, and letting them describe it.

**Segment the students** – The rich data in the system so can now theoretically segment the students. Examples of a persona included ‘wise owls’ who have not applied yet, but have signed up to careers info. Using this segmentation we can have a highly targeted list, and can talk dynamically and singularly to them.

**Choose your channels** – students can open or close access to different communication channels, and this should be granular.

**Personalise appropriately** – low level technology but it can create communications which are highly applicable to the student. E.g. “Hello again (name) great to meet you on (date) at (event) to chat about your interest in (subject)” is a simple but effective communication.

**Automate** - This would all take an inordinate amount of time without automation. We should automate each touchpoint. Set up in advance. Create a series of touchpoints. The recruitment journey is a long one, so fill the silences with relevant communications. E.g. for a student who has requested a prospectus: 7 days get an SMS, then a letter after 10 days, at 14 days a follow up email, and following this a 60 day follow up email.

**Checklist summary**

1. Centralise data storage
2. Segment students
3. Create personas
4. Choose your channels
5. Personalise appropriately – relevant and no further.
6. Automate messaging

**Further reading**

Dom noted that further reading could be found at: <http://bit.ly/student-name-here>

**Questions**

Dom invited questions from the group.

Someone explained that they were nervous when sending emails including dynamic content to thousands of offer holders that the content would not function as anticipated. Dom said that this was common to have this doubt, and that it was important to have training and trust in the provider.

**Question** – AB testing… if there are institutions thinking about moving towards personalisation, are there best ways to go about this?

Dom – could start with subject line, very simple, a small pilot with A/B then deploy to the whole list. There is a dynamic way of doing this where it automates it. There is a big appetite for A/B testing. However, while subject lines do increase open rates, the impact of them will depend how they already view you – if you’re ‘warm’ and expected then the subject line is potentially less important. Dom said he has yet to find someone who has saved significant amounts of money by A/B testing.

**Question** – do you agree when sending teachers newsletters that they should be treated in the same way? Dom asked in what context, and what is the end goal in influencing teachers? It was replied that the newsletters are termly, with the goal being to encourage them to come to open days, teachers events etc. Dom suggested that maybe they should be more important if they have more influence over a students’ decision?

**Question** – with automation what is a good number of emails and touchpoints?

Dom – we send lots of emails, and people ask what is the best day, time etc. He said all of the stats and reports have been shot to pieces by the fact that there isn’t such a 9-5 life now. Then people focused on the frequency in reports – there is such a thing as too much, but also not enough.

With this in mind, or to test this, Dom suggested having a “manage your preference” or “opt out here” option in emails. Then increase the number of messages. Assuming each message is timely and relevant it shouldn’t increase opt outs. Ultimately, as long as it is producing value, email as much as possible.