

WebSphere Summit

Personalization and Site Analysis

Friendly Finance Business Requirements

*Personalized offerings
should increase your sell
through*



IBM

"What can we do to sell
more of our offerings to
our web customers?"



VP Sales

Friendly Finance I/T Requirements

"...WebSphere Personalization Server and Site Analyzer have the best tools"



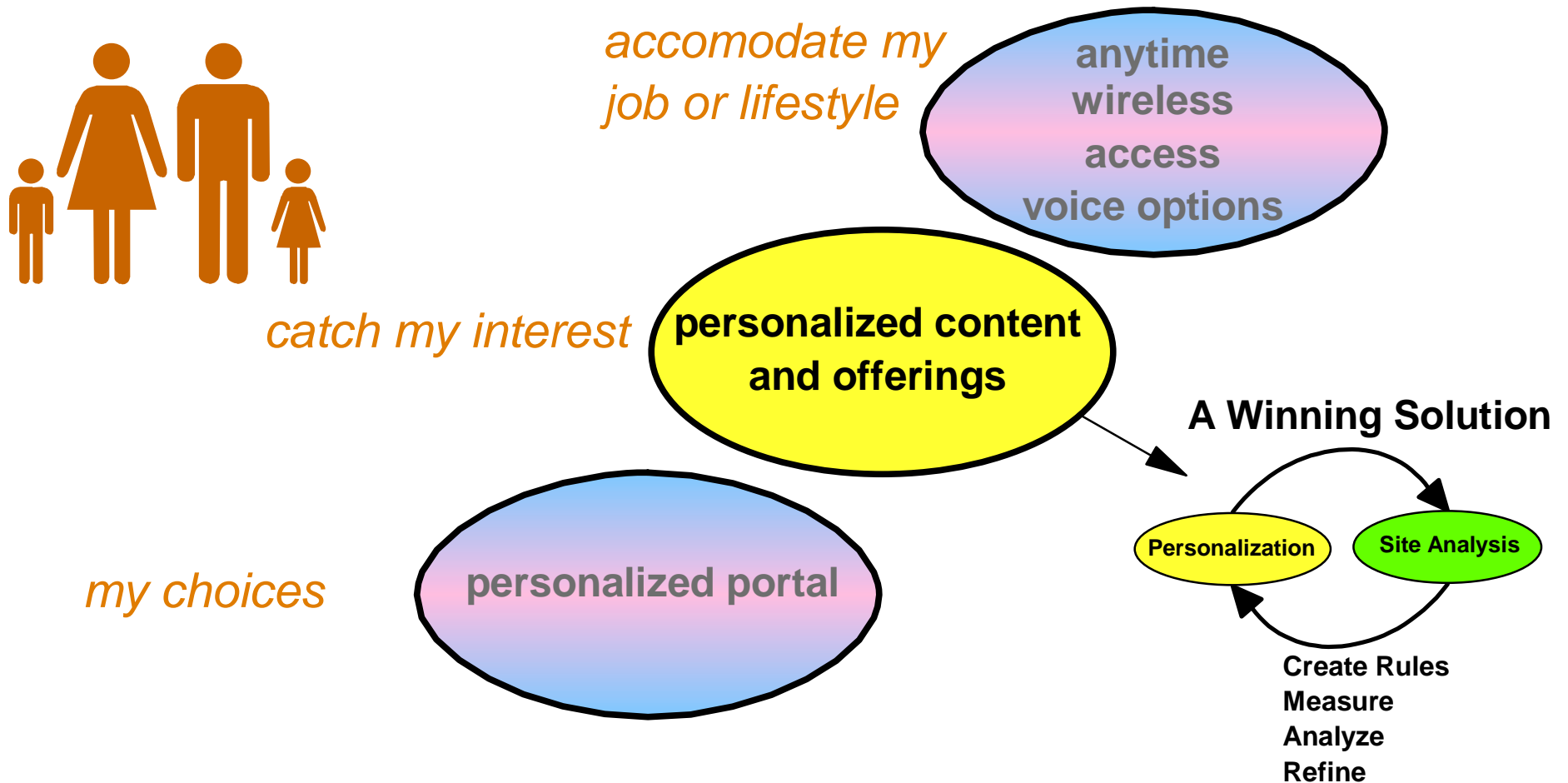
IBM

...our programmers do not have merchandising skills....we need a tool that a business manager can use to merchandise.....

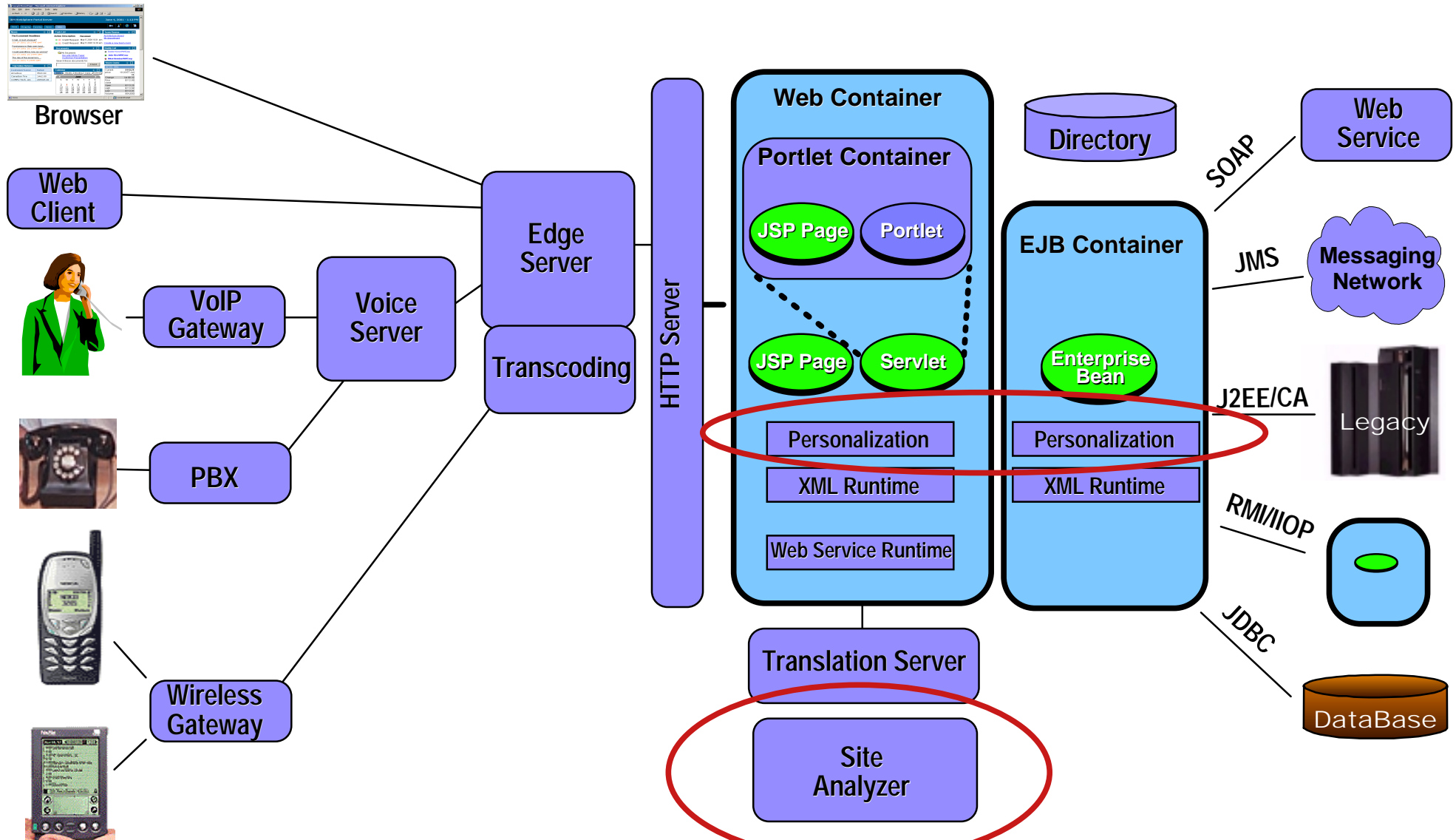


I/T Executive

Engage More Visitors/Customers- Sell More



WebSphere Platform Logical Elements



DEMO 1

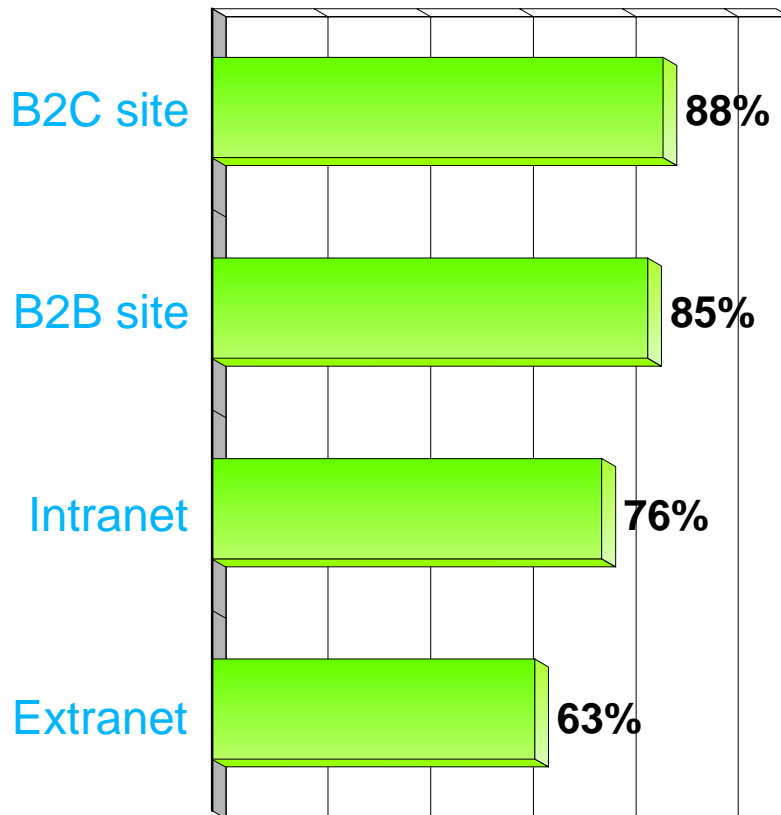
What is Personalization



Personalization's Benefits and Uses

- Providing the right information at the right time to the right person.

Where Companies Are Using It

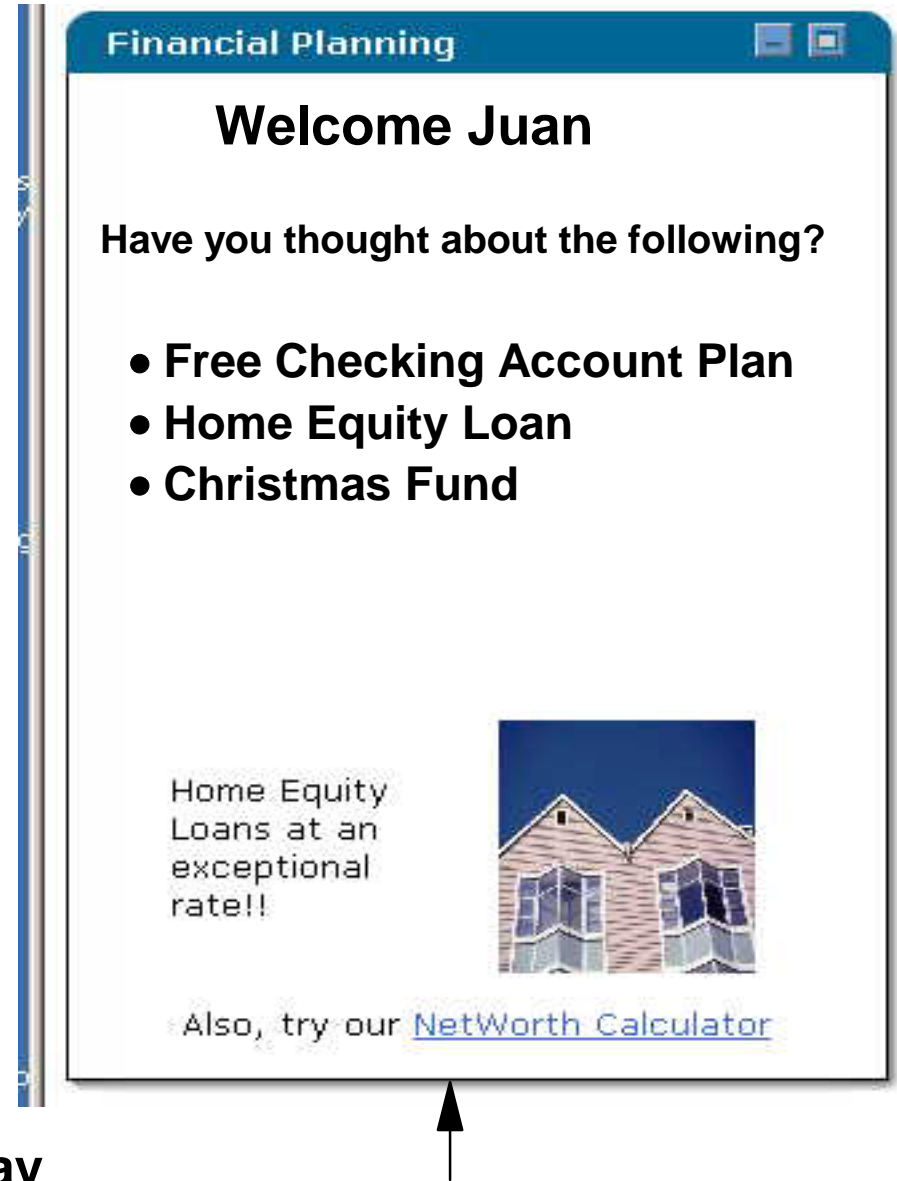
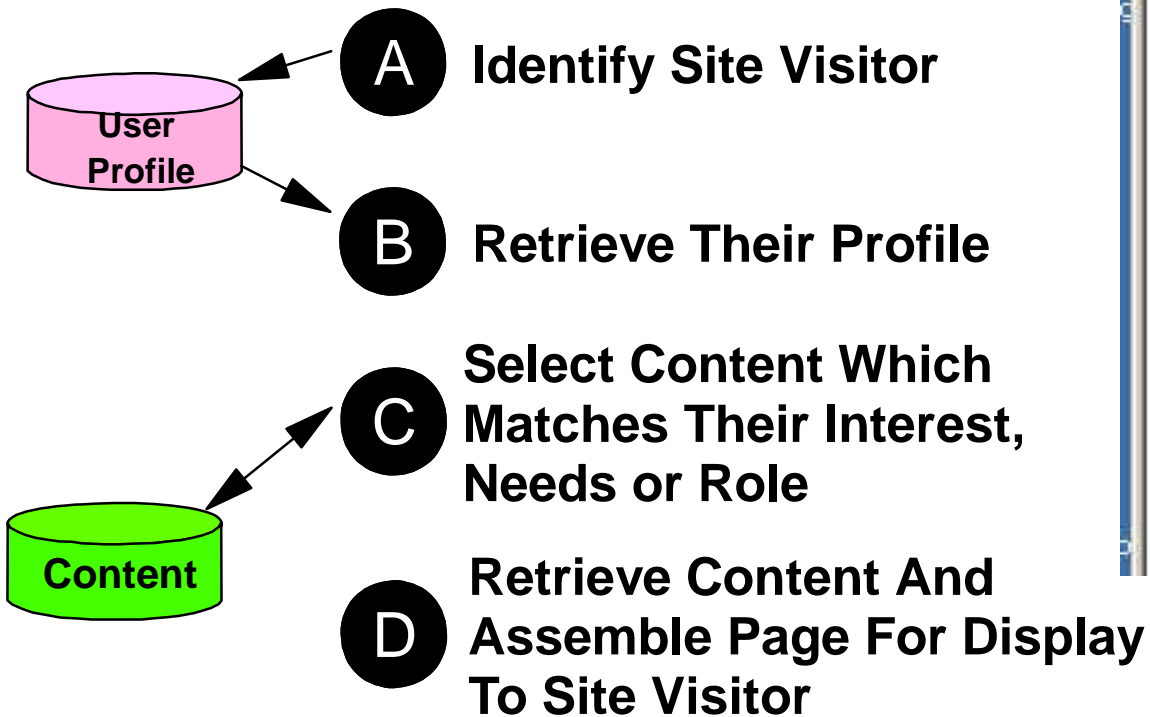


■ Benefits

- ▶ Visitors remain longer on a site and return more often leading to increased sales
- ▶ Sites become easier to use leading to improved service for your site's audience
- ▶ Site content becomes more relevant for each visitor making the site more useful for them
- ▶ Sites become more interesting thus attracting a larger audience

Elements of WebSphere Personalization

New Portal-Style User Interface



IBM WebSphere Personalization v4.0

Rules Architecture

- Rules Engine

- ▶ executes the business rules
- ▶ Displays content to each site visitor

- Resource Engine

- ▶ Accesses user profile and content information from multiple sources

- Personalization Tooling

- ▶ WebSphere Studio Advanced Edition V 4.0 (for programmers)
- ▶ Personalization Workspace (Browser access for business users)

Defining A Personalized Experience

■ Classifier Rules

- ▶ Classify based on Current Users' properties and group membership
- ▶ Classify based on Date and Time
- ▶ Classifications can be ANDed, ORed, and grouped together

■ Action Rules

- ▶ Select specific content based on user profile, application objects, session variables or request parameters
- ▶ Update user profile, application objects, or session variables

■ Binding Rules

- ▶ Combine Classification and Action Rules
- ▶ e.g. If Customer is **Platinum** select ***Personal Financial Consulting***

■ Campaigns

- ▶ Organize multiple existing rules (Collection of rules)
- ▶ Active for a specific time

WebSphere Rules

■ Classifiers

▶ AccountType

– Platinum

- Has over \$50,000 in savings

– Gold

- Has \$10,000 - \$50,000 in savings

– Silver

- Has less than \$10,000 in savings

■ Actions

- ▶ Display CD Program Information
- ▶ Display Personal Financial Consulting Information
- ▶ Display Mutual Fund Club Information
- ▶ Display Venture Capital Club Information
- ▶ Display Cruise Club Information

Binding Rule

for AccountType Platinum

select CD Program

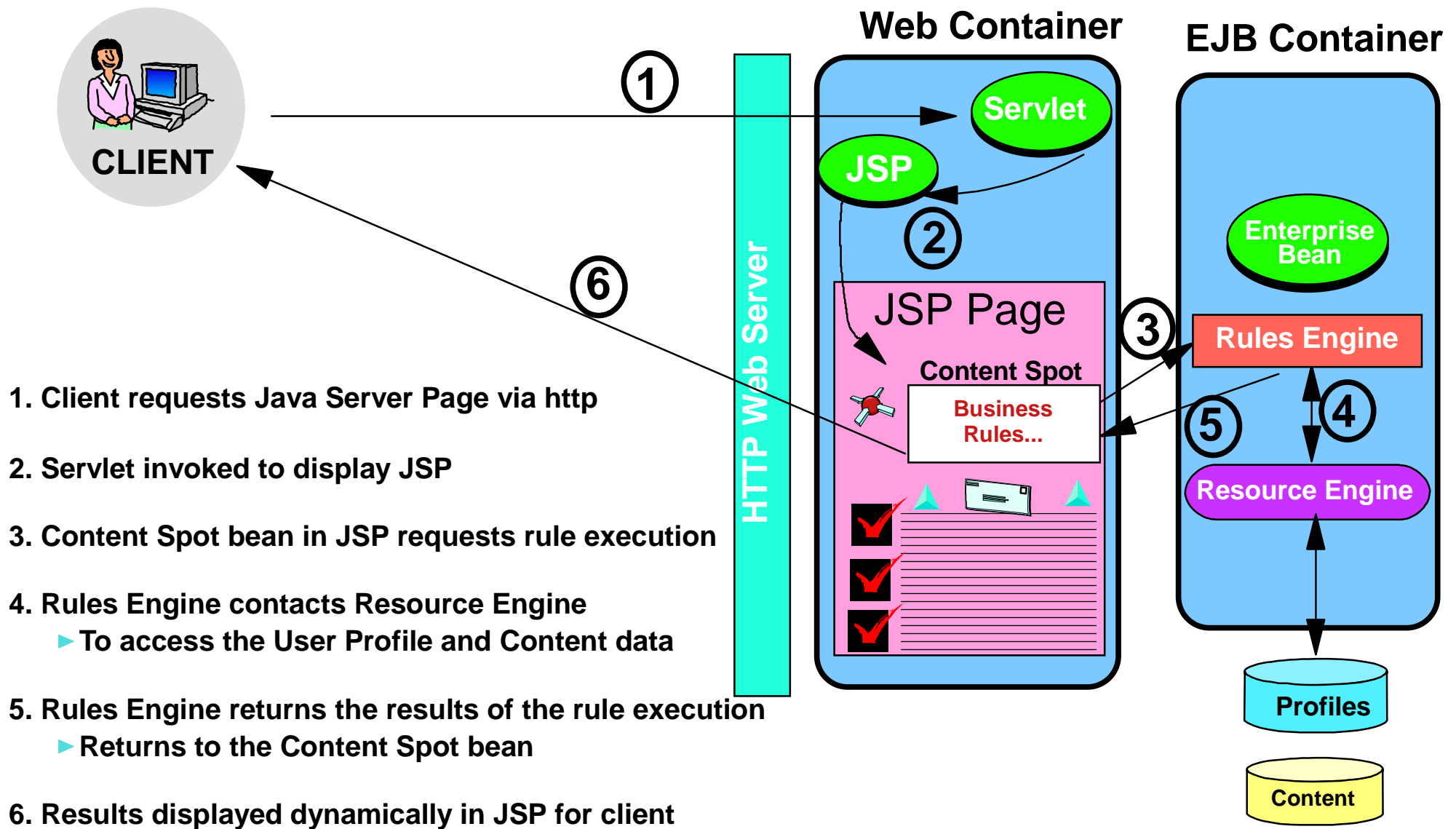
select Personal Financial Consulting

select Mutual Fund Club

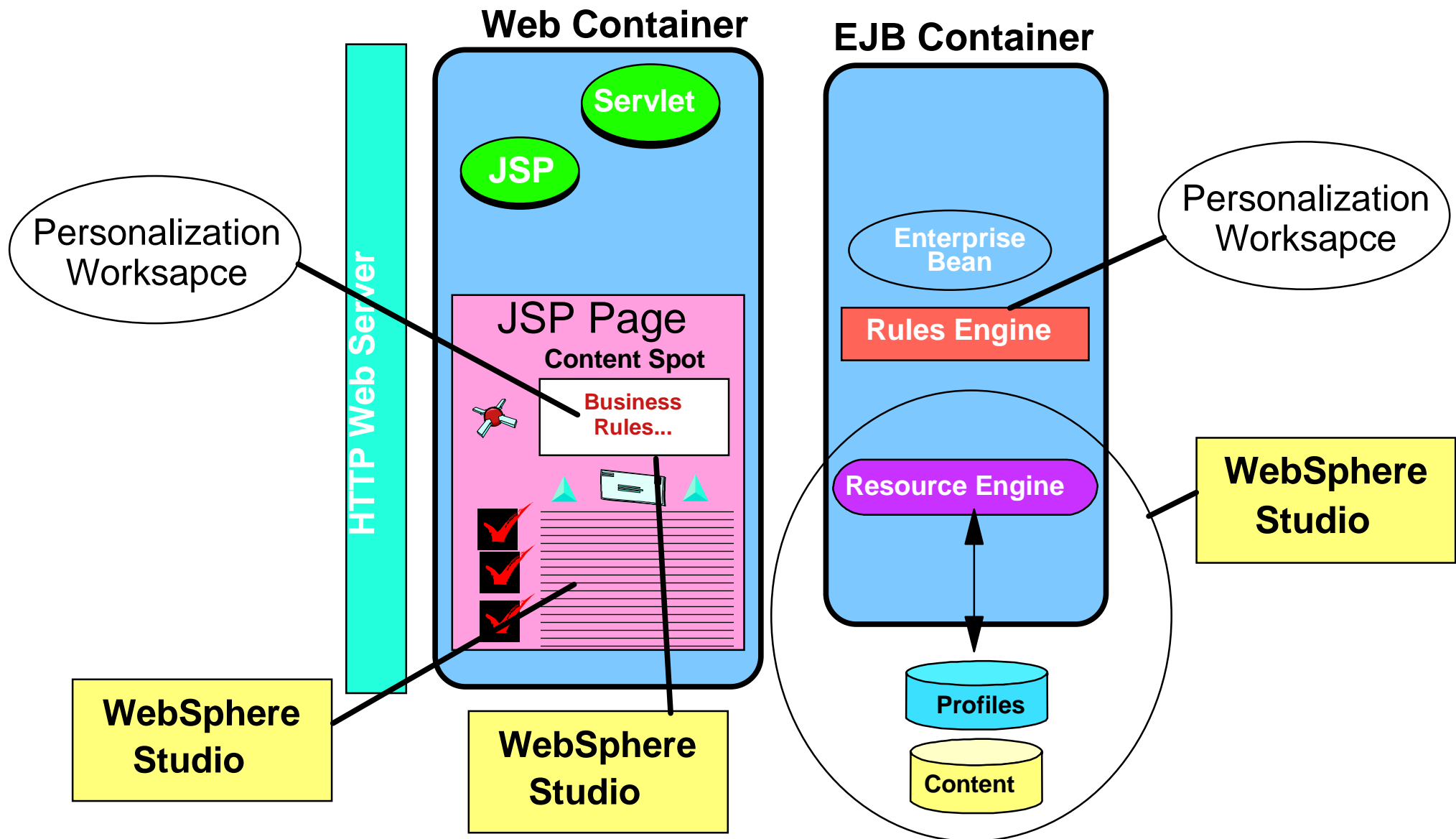
select Venture Capital Club

select Cruise Club

WebSphere Personalization Runtime Environment



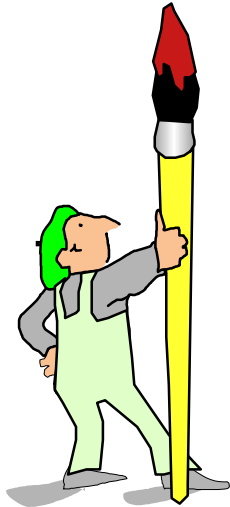
WebSphere Personalization Development Environment



Let's Get Personal!

Developer

Uses WebSphere
Studio V 4.0



1. Implement access classes for the resource engine

- ▶ User profile and Content Wizards

2. Create "content spots" for Java Server Pages

- ▶ Create using *Content Spot Wizard*
- ▶ Personalization Rules will be placed in content spots later

3. Publish

- ▶ User profile and Content Access Classes
- ▶ content spots and JSPs

Business Manager

Uses browser based
Personalization
Workspace

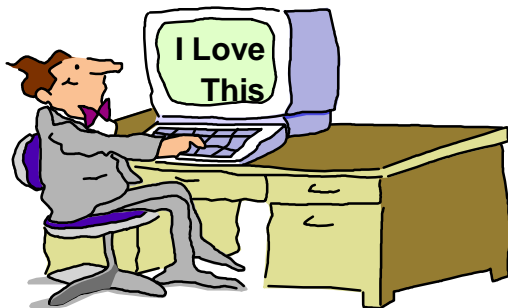
4. Create rules with Personalization Workspace

- ▶ Business manager tool

5. Assign rules to "content spots"

6. Preview the rules

7. Deploy the rules "live"



DEMO 2

Easy to Build Rules



Recommendation Engine Example

Herman has IBM, CISCO, INTEL in his stock Portfolio



same attributes



Recommendation Engine (Collaborative Filtering)

Juan	IBM, CISCO, INTEL, Microsoft, Exxon, General Motors
Heidi	IBM, CISCO, INTEL, Glaxo, Prudential, Deutsch Telecom, Exxon
Sal	IBM, CISCO, INTEL, British Airways, British Petroleum, AOL
Tim	IBM, CISCO, INTEL, AOL, E*Trade, Exxon, United Parcel



High Occurrence

Recommend Herman purchase:

1. Exxon
2. AOL

Recommendation Engine

■ Delivers recommendations based on

- ▶ Purchase
- ▶ Clickstream
- ▶ Preference
- ▶ Product Matching
- ▶ Product Affinity

■ Complementary to business rules

- ▶ Uses "Collaborative Filtering" to find new buying patterns not captured in business rules
- ▶ Adapts to changes in buying patterns without the need to create new business rules

■ Advantages

- ▶ No Rules needed
- ▶ Self Adapts

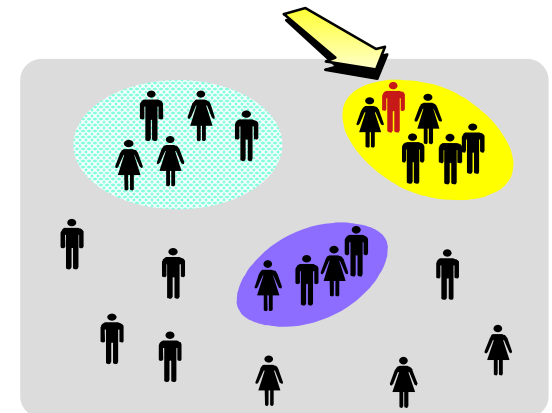
■ Disadvantages

- ▶ Can not push product (campaigns)
- ▶ Time to build DB

■ Recommendation Engine is LikeMinds Personalization Server V5.0 by Macromedia

Example:

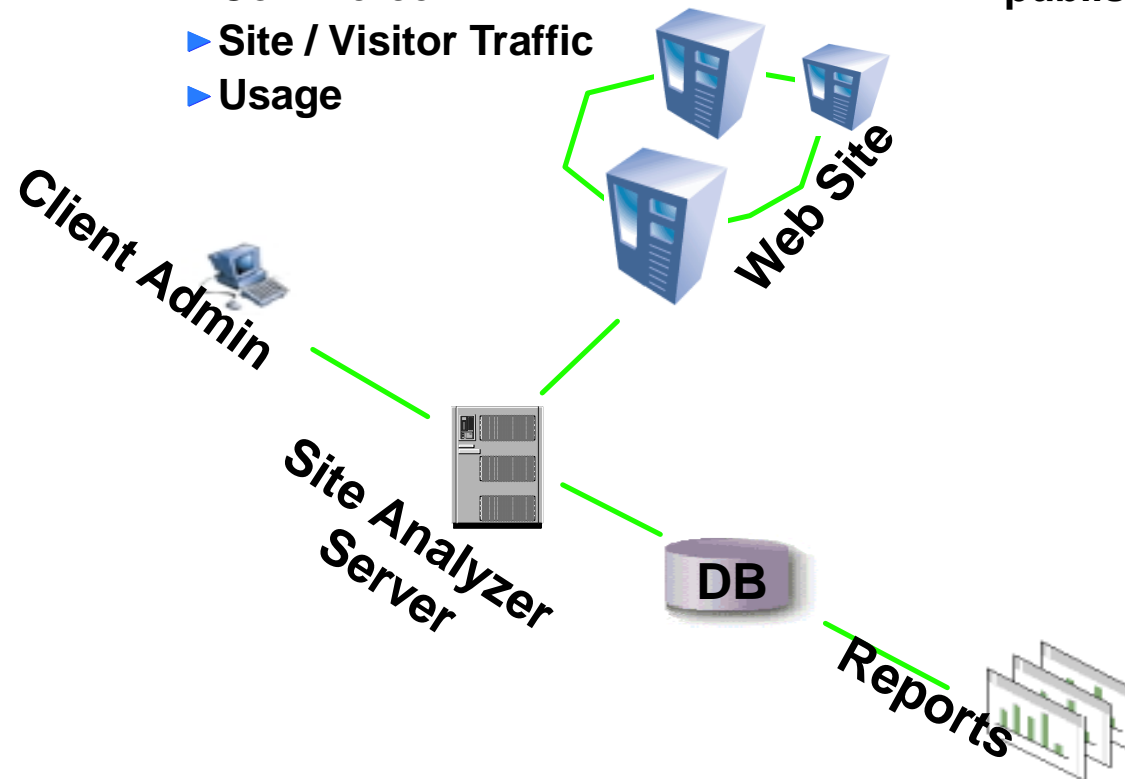
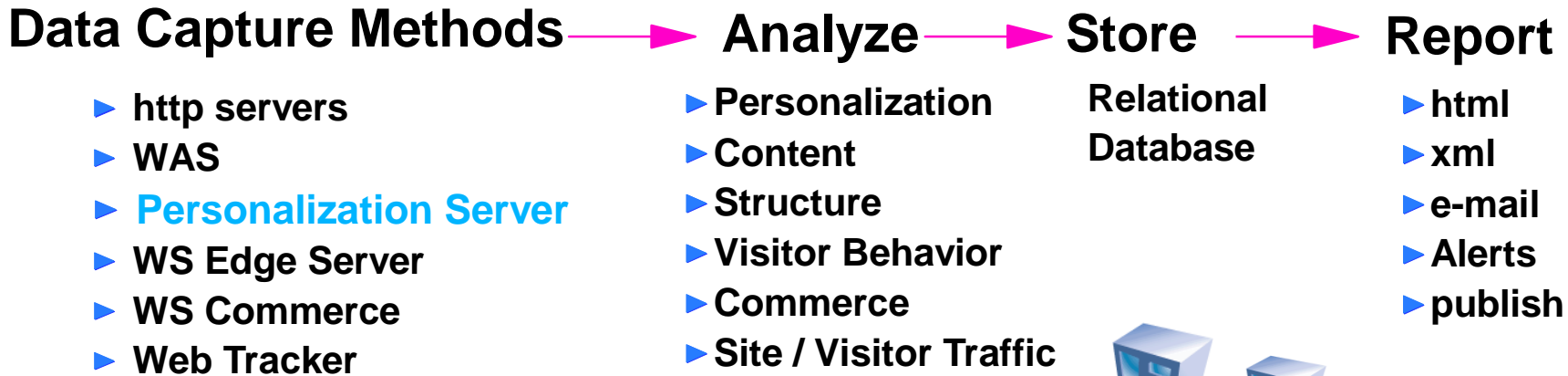
- What might Herman be interested in?



Understanding the Need for Web Analytics

- How can you easily understand your web site customers and visitors
- **WebSphere Site Analyzer V4.0** can help answer:
 - ▶ How effective is the Personalization campaign?
 - ▶ Where are customers coming from. Where do they go when they get here?
 - ▶ What content on my site is 'hot', maximizing 'stickiness', and what is 'not'?
 - ▶ Who are my most loyal customers and what content is causing them to return to my site?
 - ▶ How can I prove Return on Investment of my web initiatives and campaigns to the marketing and sales executives?

WebSphere Site Analyzer Scope



What WebSphere v4.0 Site Analyzer Delivers

■ Business Oriented Measurements

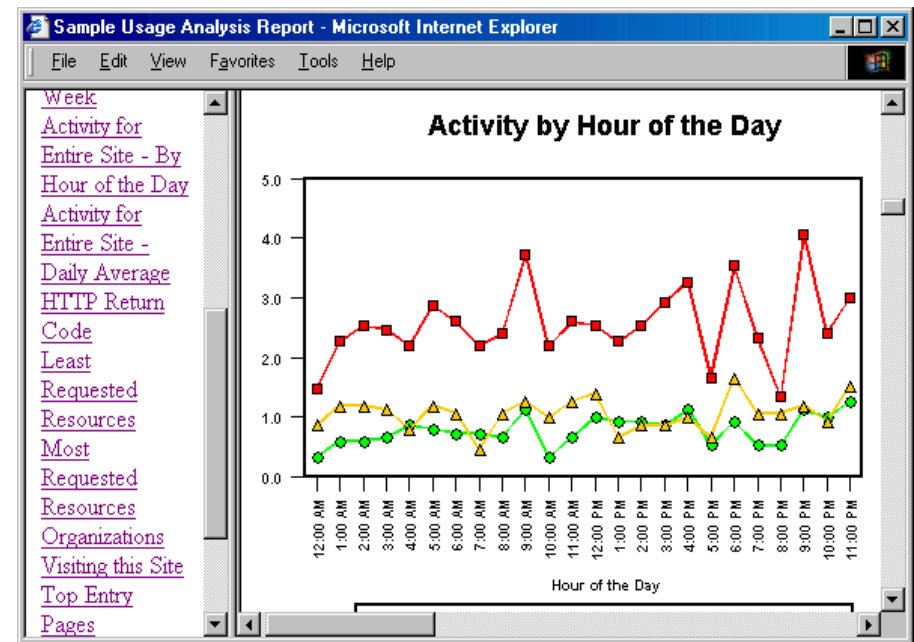
- ▶ **Efficacy analysis:** This feature measures the effectiveness of advertisements, merchandising, and personalization.
- ▶ **Visitor analysis:** This feature characterizes visitors based on their behavior (digital gestures) while interacting with the site.
- ▶ **Customer analysis:** This feature characterizes established customers for their value and loyalty.

■ Traffic Oriented Measurements

- ▶ **Traffic analysis:** Formulates the patterns of traffic arrival in hits, page views, and visits. The information may be used to gauge the success of the business in terms of traffic volume generated.

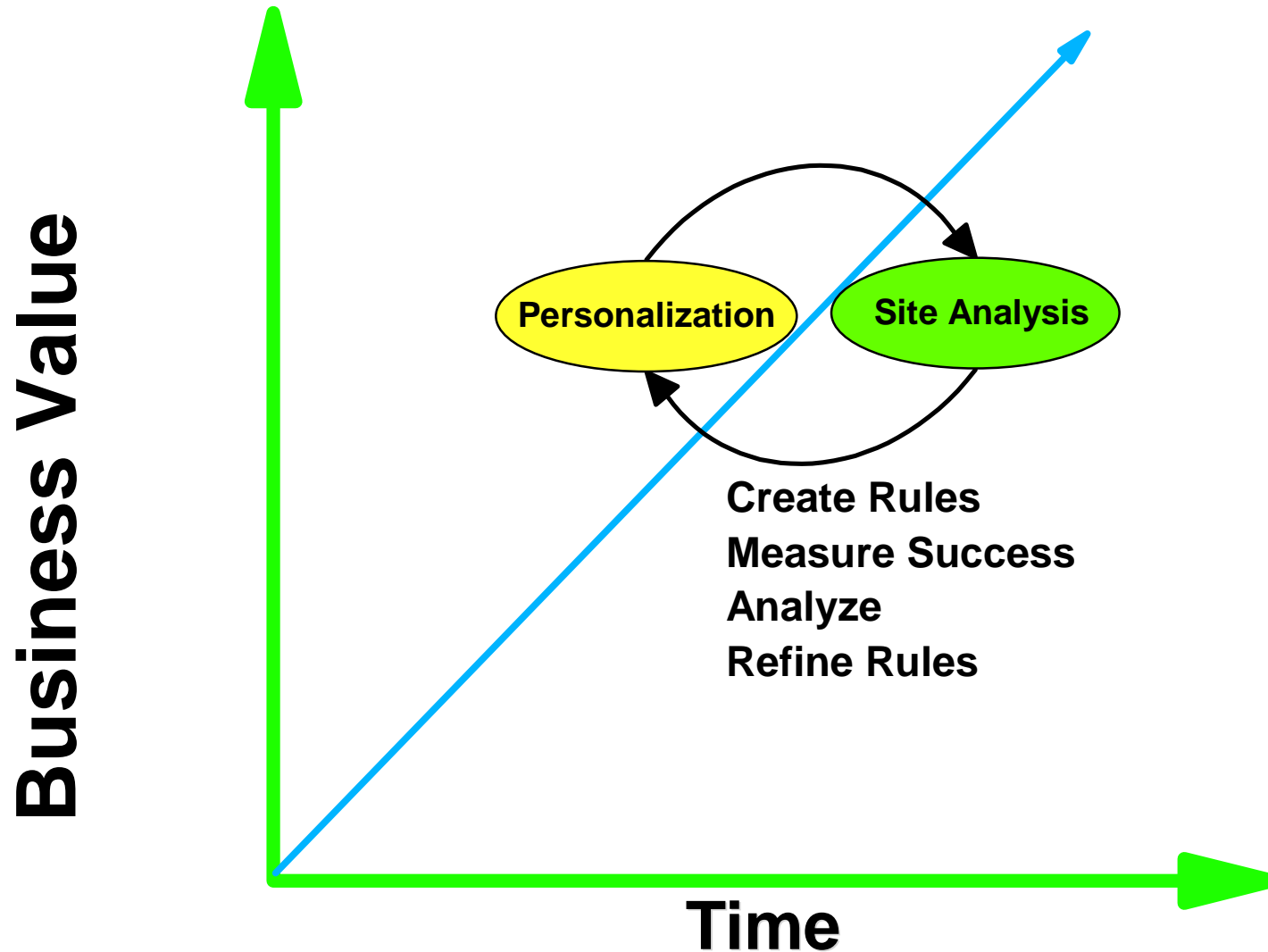
■ Site Health Oriented Measurements

- ▶ **Content analysis:** Checks the policy conformance (e.g. meta tags) of the pages. Certain site-wide defined attributes should be present in the page for consistency and manageability.
- ▶ **Structure analysis:** Ensures that links are valid, pages are not too large or contain too many objects that may cause slow load time.



Closed Loop Merchandising

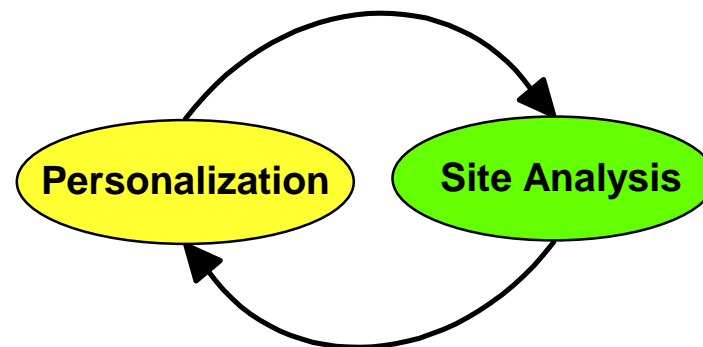
Constant Refinement of Personalized Campaigns



DEMO 3

Closed Loop

Merchandising



Create Rules
Measure Success
Analyze
Refine Rules

WebSphere Personalization V 4.0 and WebSphere Site Analyzer V 4.0 Advantages

Characteristics	IBM	BEA Personalization V 3.5
<i>Closed Loop Merchandising (Personalization & Site Analysis integrated)</i>	yes	no
<i>Choice of Personalization Engines</i>	yes 1) Rules Based 2) Recommendation Engine	no Rules based only
<i>Ability to "hot deploy" rules with publish</i>	yes	Limitations
<i>Browser access to Business & Campaign Manager tools</i>	yes	partial
<i>Seamless Integrated Tools - Content, User Profile and Content Spot Wizards</i>	yes	no
<i>Full Integration with Application Server Platform - Security, Scaling, Languages, WAP & WML Support etc.</i>	yes	partial