Opticon

The Art & Science Behind Personalization & Journey Optimization

Alyssa Schwabe

VP, Digital Marketing Manager

JOHNSON FINANCIAL GROUP

Jim King

VP, Partnerships

VERNDALE

Agenda

1. Introduction
2. The Foundation for Personalization
3. Crafting a Data-Driven Experience
4. Future State: Integrations
5. Envisioning the Art of the Possible

01

Introduction

Johnson Financial Group & Verndale Partnership

JOHNSON FINANCIAL GROUP®

About Us

- Largest privately held financial institution in Wisconsin
- Banking and wealth for personal, business, and commercial & institutional
- Firmly rooted in our communities for more than 50 years

VERNDALE

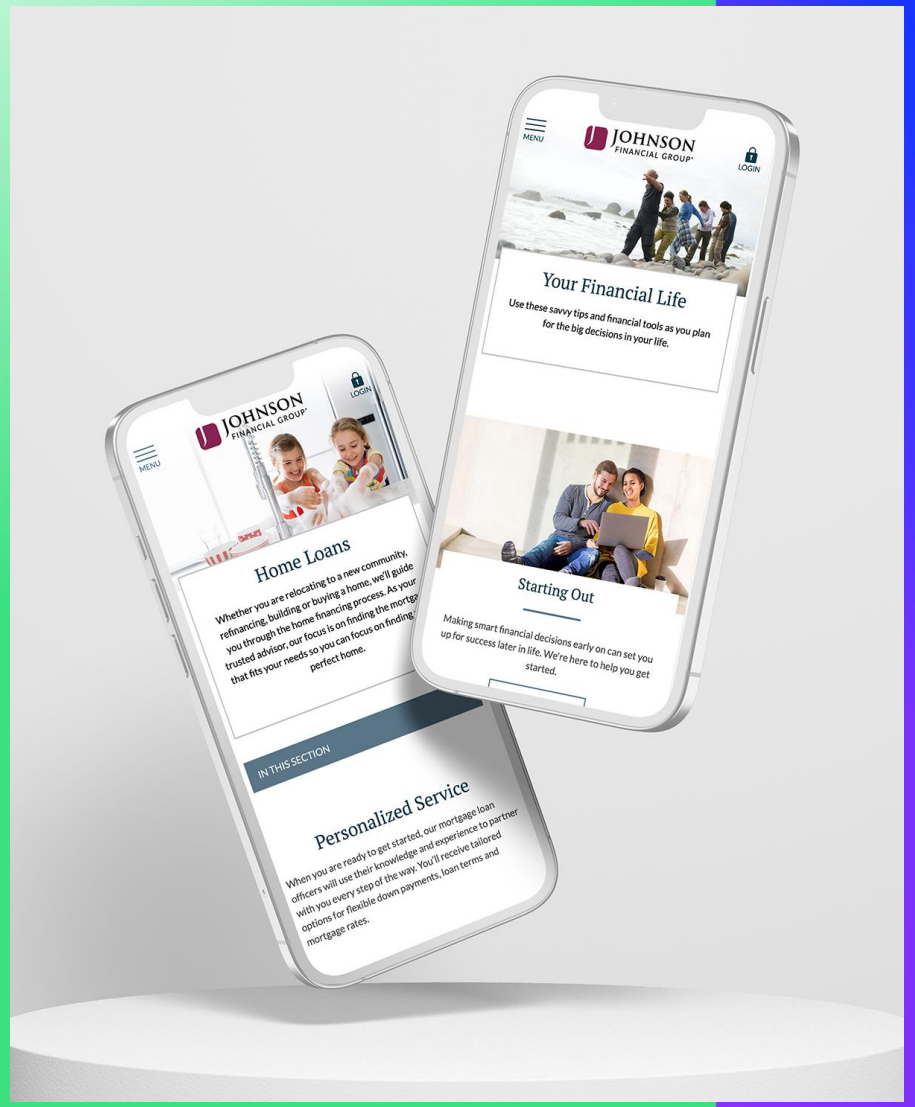
Optimizely Premier Platinum Partner

Full-Service Digital Experience Agency Partner to Johnson Financial Group Since 2019

- Digital Strategy
- CMS/DXP Development
- Experience Design
- Digital Marketing
- Data & Insights

02

The Foundation for Personalization



Personalization

Starting Small: Content Recommendations

- Related Resources
- “We Can Also Help You With” Section

Continuously Maturing: Enabled the Capability Across the Site

- Navigation
- Example: Homepage redesign brings a unified OneJFG experience

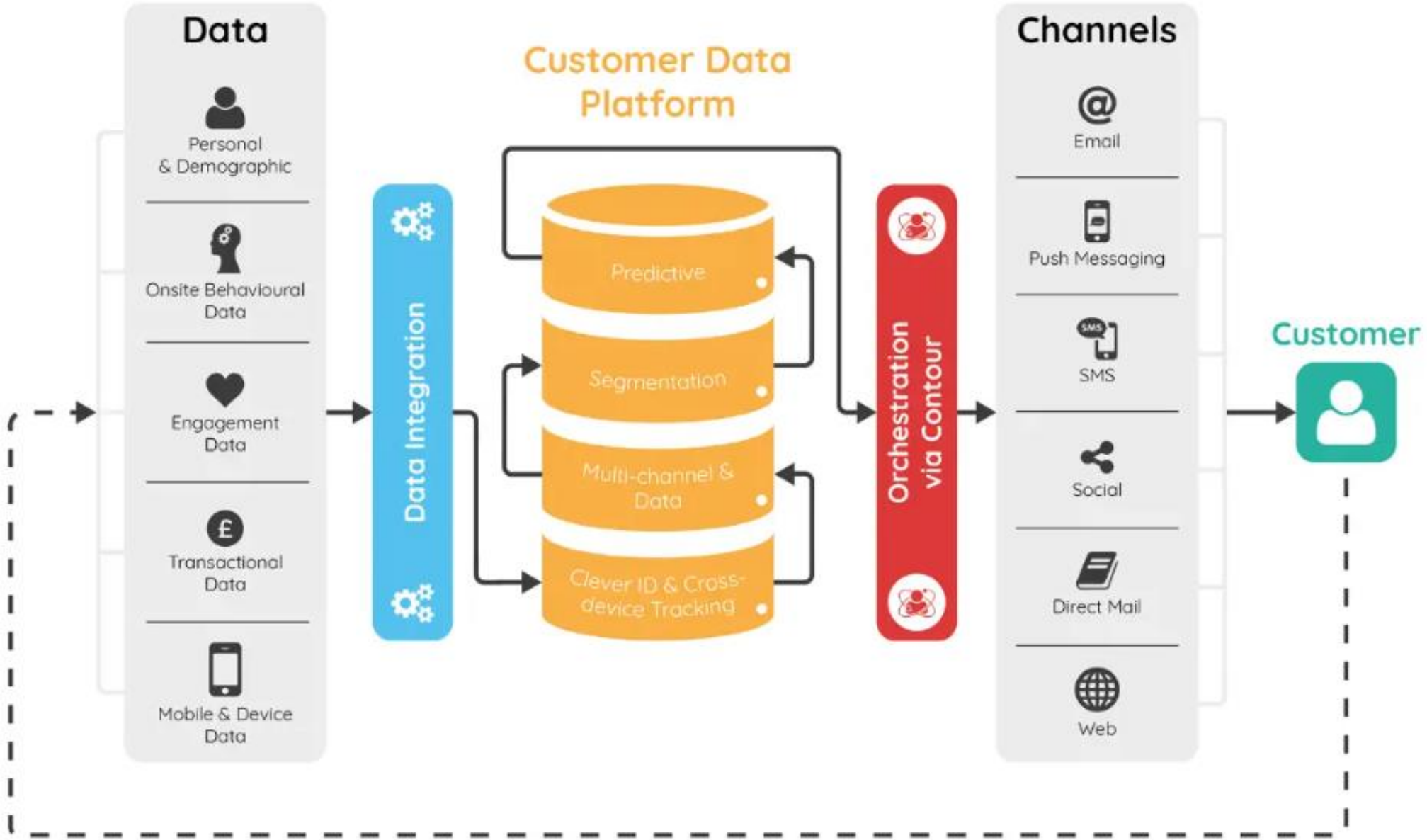
03

Crafting Data-Driven Experiences

Optimizely Data Platform (ODP)

Crawl, Walk, Run

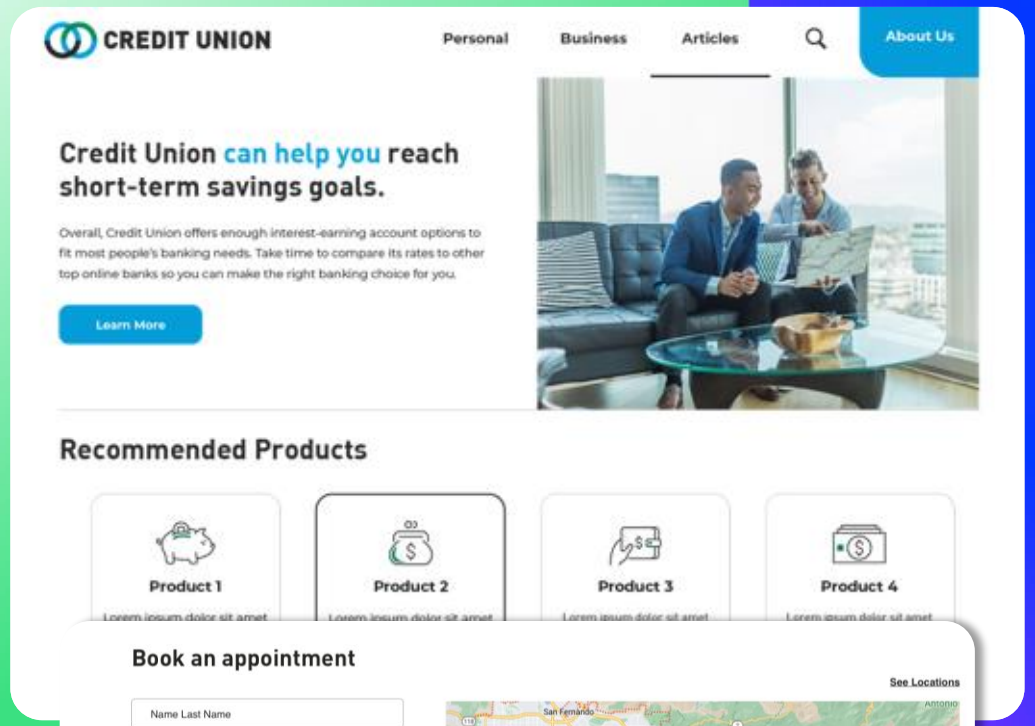
- Financial services regulations
- Website data was kept within our marketing department to create a proof of concept.
- Digital roadmap via Verndale, including:
    - Importing historical data
    - Building profiles
    - Enriching profiles
    - Creating business & marketing goals

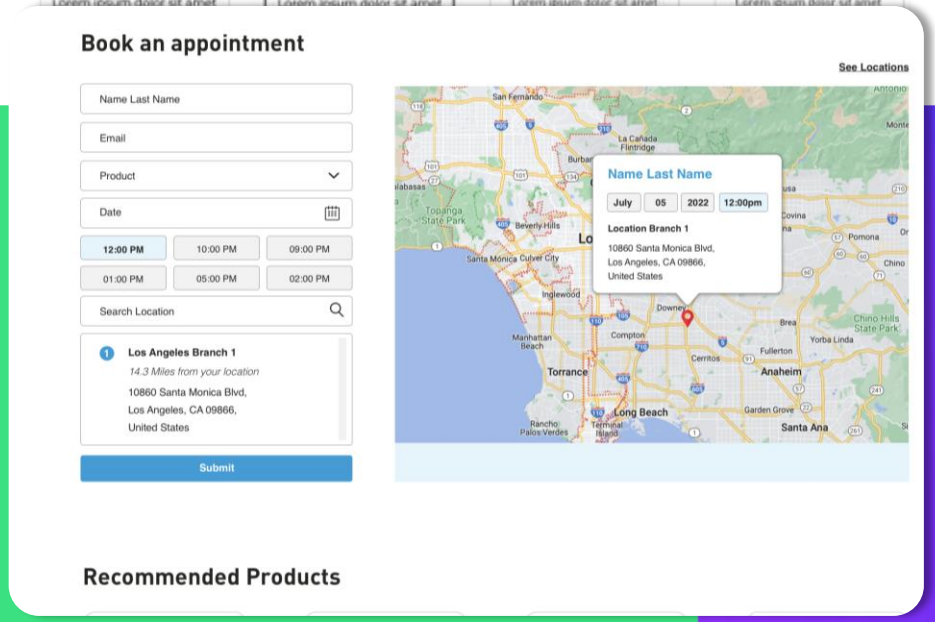

Data
Personal & Demographic
Onsite Behavioural Data
Engagement Data
Transactional Data
Mobile & Device Data
Data Integration
Customer Data Platform
Predictive
Segmentation
Multi-channel & Data
Clever ID & Cross-device Tracking
Orchestration via Contour
Channels
Email
Push Messaging
SMS
Social
Direct Mail
Web
Customer

04

Live Digital Experience

Envisioning the Art of the Possible



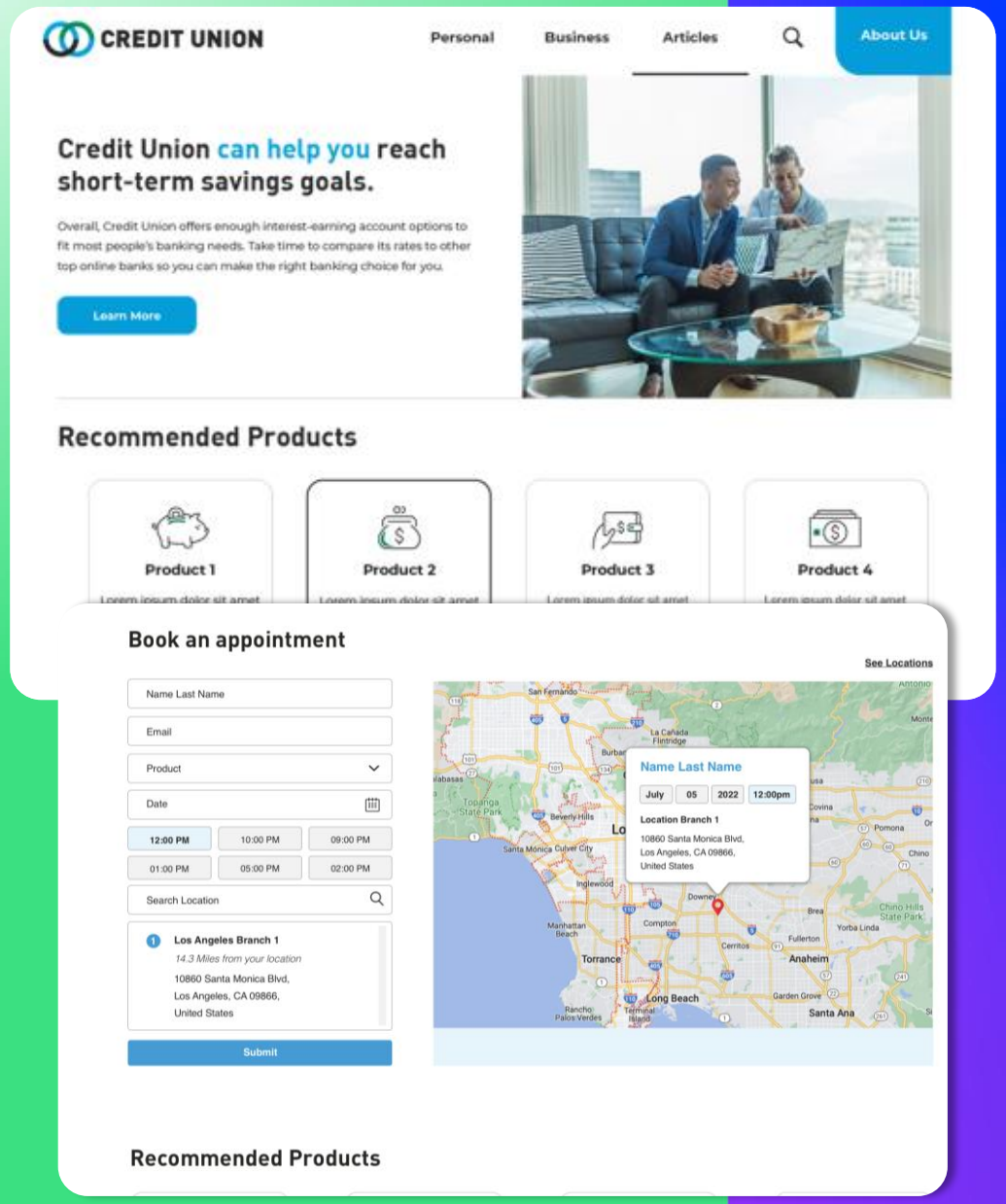


Fully Integrated DXP Experience

Delivering 1-to-1 Personalization Real-Time Across:

- Web
- Ads
- SMS
- Email
- Mobile App

Infinity Bank



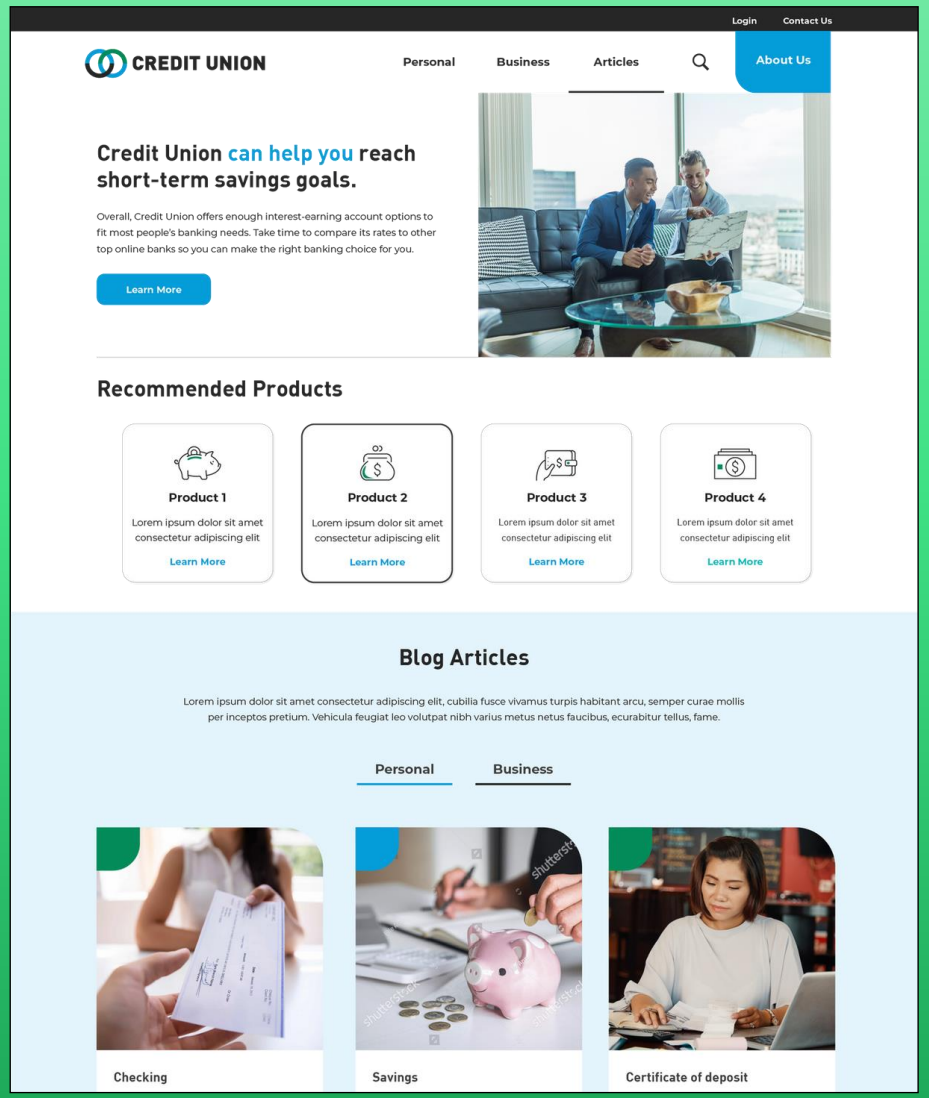
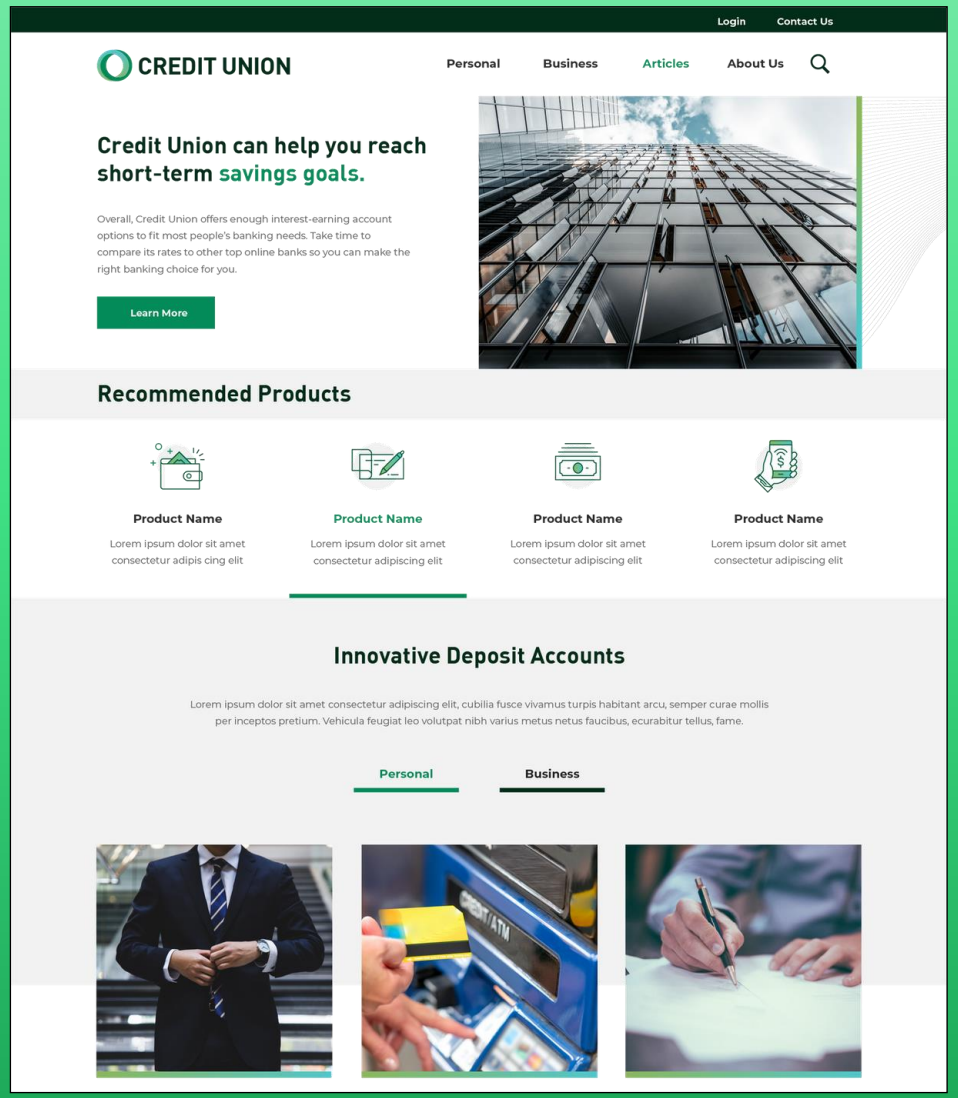
Fully Integrated DXP Experience

Integrated Optimizely products for a unified experience:

- Content Cloud
- Content Recommendations
- Web Experimentation
- Feature Experimentation
- ODP
- Search
- Salesforce CRM*

Our Content Profiling Matrix

	Life stages	Teen	College Student	Recent Graduate	First Job	First Business	Marriage	House Purchase	Homeowner	First Child	College	Retirement
Products												
Car Loan				X	X	X	X	X		X	X	X
Mortgage								X				
Home Refinance									X			
Home Equity Loan									X			
529 College Savings		X	X							X		
401k				X	X	X	X	X		X	X	
CD												X
Credit Card			X	X	X		X	X		X	X	
Savings Account		X	X	X	X		X	X		X	X	
Checking Account				X	X		X	X		X	X	
Investment Account					X		X	X		X	X	X
Business Loan						X						
Business Line of Credit						X						
Business Checking Account						X						

1-to-1 personalization by mapping offerings to user's life stages and interests

Running Real-Time Experiments