



Personalization for Student Success

Buck the Overcomplication Trend!

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Hello!



Ed Braddock

CCO



Jen French

VP Sales &
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Squiz is a global digital experience company

We help higher education institutions build brilliant digital experiences fast, on a platform that embraces change.



Leader in Omdia
Universe: Digital
Experience Management:
2022-23



Magic Quadrant for
Digital Experience
Platform 2023



Leader in G2's Winter
2021 report

We work with forward-thinking educational institutions

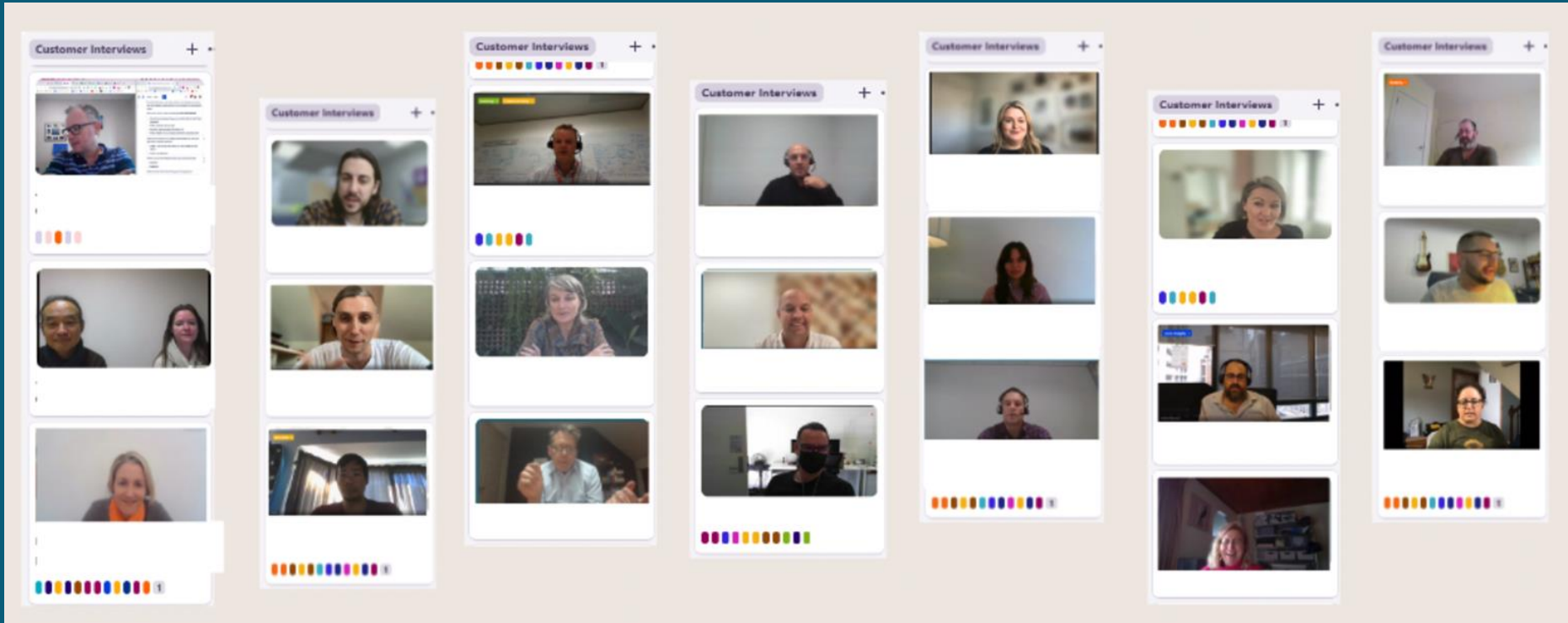
SQUIZ

20% of the top 50* ranked universities globally

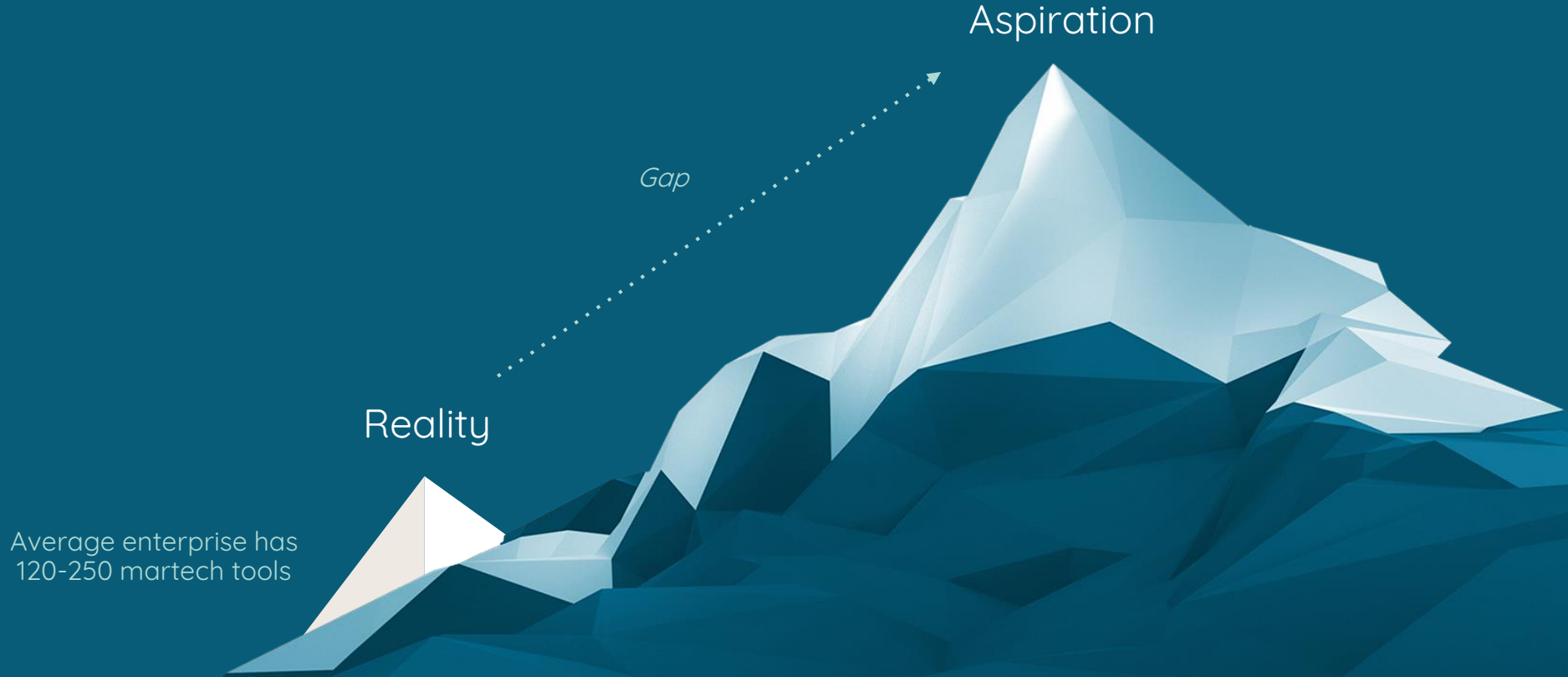


Squiz's mission

“ To create services online
that improve lives offline.”



Digital Aspiration gap



Digital experiences are too slow to build.

Held back from innovating or adapting.

Fear of change keeps the status quo.

Your options lock you in OR are too hard to manage.

Come as you are.

Build brilliant digital experiences fast,

on a platform that embraces change.

What is Personalization?

Personalization Project Challenges

Misconception of the ease
of implementation

Underestimating the
content workload

Tackling too much
at once

Lack of
ownership

An inside-out vs.
customer-in approach

Absence of an
iterative plan vs.
big bang

Personalization With the Highest Impact on Consumers

Percentage of customers who consider help type important



n = 2,585 consumers
Note: Percentages are top 2 responses on 7-point scale.
Source: Gartner 2018 Consumer Personalization Panel
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Gartner



THINK **BIG,**

START SMALL,

LEARN FAST

—
ERIC RIES

6 Steps to Personalization



Define user
segments



Define
personalization
goals



Map user
journeys



Set
personalization
triggers



Select content
to personalize



Measure
results

Undergraduate prospective student example



6 Steps to Personalization

Step
1

Define user
segments

Step
2

Define
personalization
goals

Step
3

Map user
journeys

Step
4

Set
personalization
triggers

Step
5

Select content
to personalize

Step
6

Measure
results



Step
1

Define user segments

- Understand your target audience needs
- Utilize “jobs-to-be-done” (JTBD)
- Group users with similar JTBD and other criteria

Why not personas?



King Charles III

Male

Born in 1948

Raised in the UK

Married twice

Lives in a castle

Wealthy and famous



Ozzy Osbourne

Male

Born in 1948

Raised in the UK

Married twice

Lives in a castle

Wealthy and famous

Step
1

Jobs-to-be-done

Every user has a job to do on your site

Jobs-to-be-done

Even though
customers buy **this...**

Carbon Skateboard



Swiss Bearings



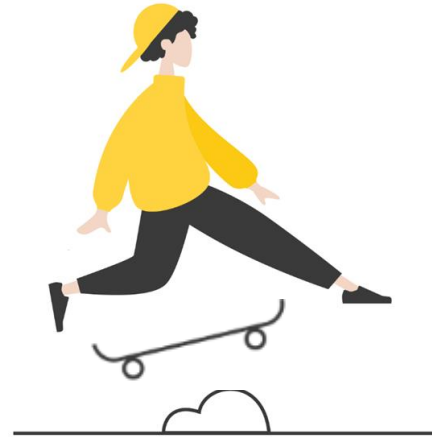
Titanium Hardware



Hollow Trucks



Polyurethane Wheels



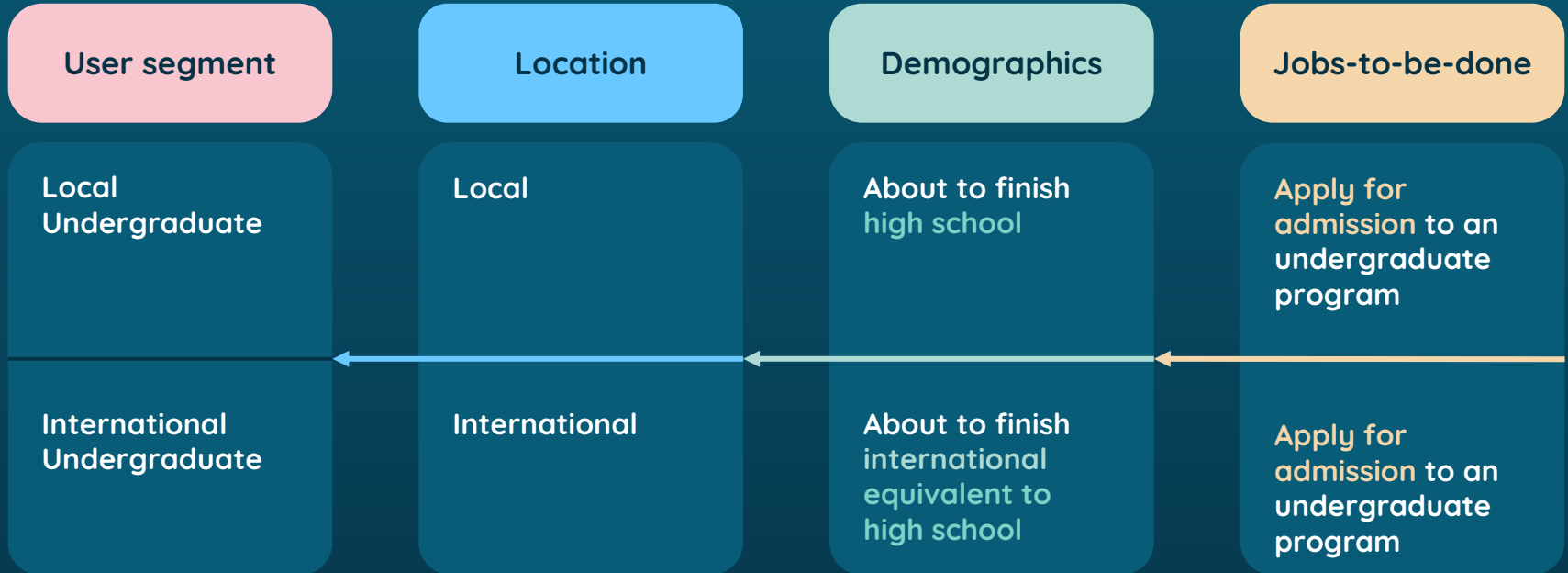
...they **really** want this.

Jobs-to-be-done interview ideas

- What's the main thing you're looking to achieve on the site?
- Why is that important to you?
- How do you normally find the information or service you need on the site?
- Are there specific information gaps that would improve your ability to get your task done?

Group users with similar JTBD

Step
1



6 Steps to Personalization



Define user segments



Define personalization goals



Map user journeys



Set personalization triggers



Select content to personalize



Measure results



Step
2

Define organizational personalization goals

- Increase engagement
- Increase conversion
- Increase upsell value
- Increase retention rate

Map user and organizational goals

User segment	Location	Demographics	Jobs-to-be-done	Organizational goals	Metrics
International Undergraduate	International	About to finish high school equivalent	Apply for admission into undergraduate program	Increase conversion	Admission form completion
Local Undergraduate	Local	About to finish high school	Register to attend a campus tour	Increase engagement	Tour registration completion

6 Steps to Personalization



Define user segments



Define personalization goals



Map user journeys



Set personalization triggers



Select content to personalize



Measure results

Step 3

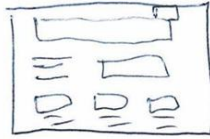
Map user journeys

- Analyze the current behavior.
- Map out the ideal user journey to:
 - Improve their existing journey.
 - Remove unnecessary friction.

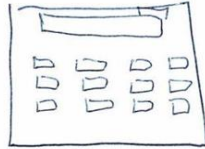


GOAL = REGISTER FOR UPCOMING CAMPUS TOUR

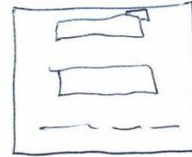
- VISIT ONE



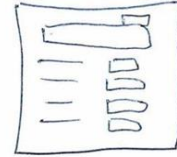
LANDS ON WEBSITE AND SEARCHES "CAMPUS TOUR"



A RANGE OF TOUR TYPES AND DATES ARE DISPLAYED. USER SELECTS OPTION



A 'REGISTER NOW' BUTTON IS DISPLAYED. USER TAKEN TO A FORM

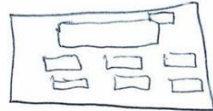


USER COMPLETES FORM AND SUBMITS DETAILS

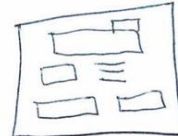
- VISIT TWO



USER RETURNS TO SITE. INFO ON UNDERGRAD PROGRAMS ARE DISPLAYED



USER CLICKS 'ELECTRICAL ENGINEERING' AS DEGREE OF INTEREST



USER TAKEN TO PROGRAM PAGE, ENGAGES WITH VIDEO AND TEXT CONTENT

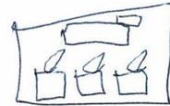
- VISIT THREE



USER RETURNS SERVED PROGRAM AND COURSE INFO IN WIDGET



ARTICLES ON HOMEPAGE SHOW CURRENT ENGINEERING STUDENTS AND FORMER ONES IN WORKFORCE



MAJOR COMPLETION MAP SHOWS DISTINCTIVE REQUIREMENTS FOR DEGREE PROGRAM

6 Steps to Personalization



Define user segments



Define personalization goals



Map user journeys



Set personalization triggers



Select content to personalize



Measure results

Set personalization triggers

Point or action in the user journey where you can start to control the content being seen.

Anonymous

Authenticated

Set personalization triggers

Anonymous

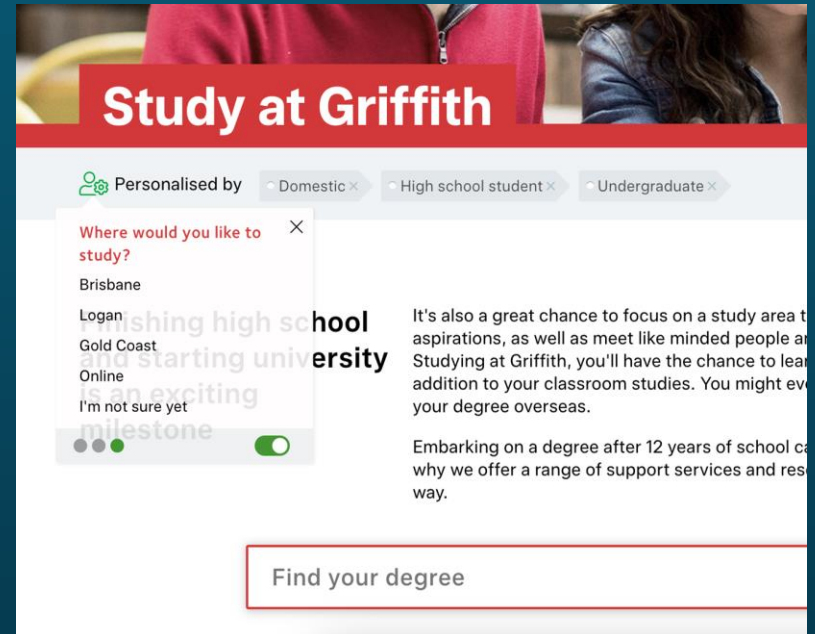
Self-identification or behavioral

- First-party cookie
- User location
- Web event
- Device type
- Traffic source
- Self-identification
- Search

Personalization using self-identification

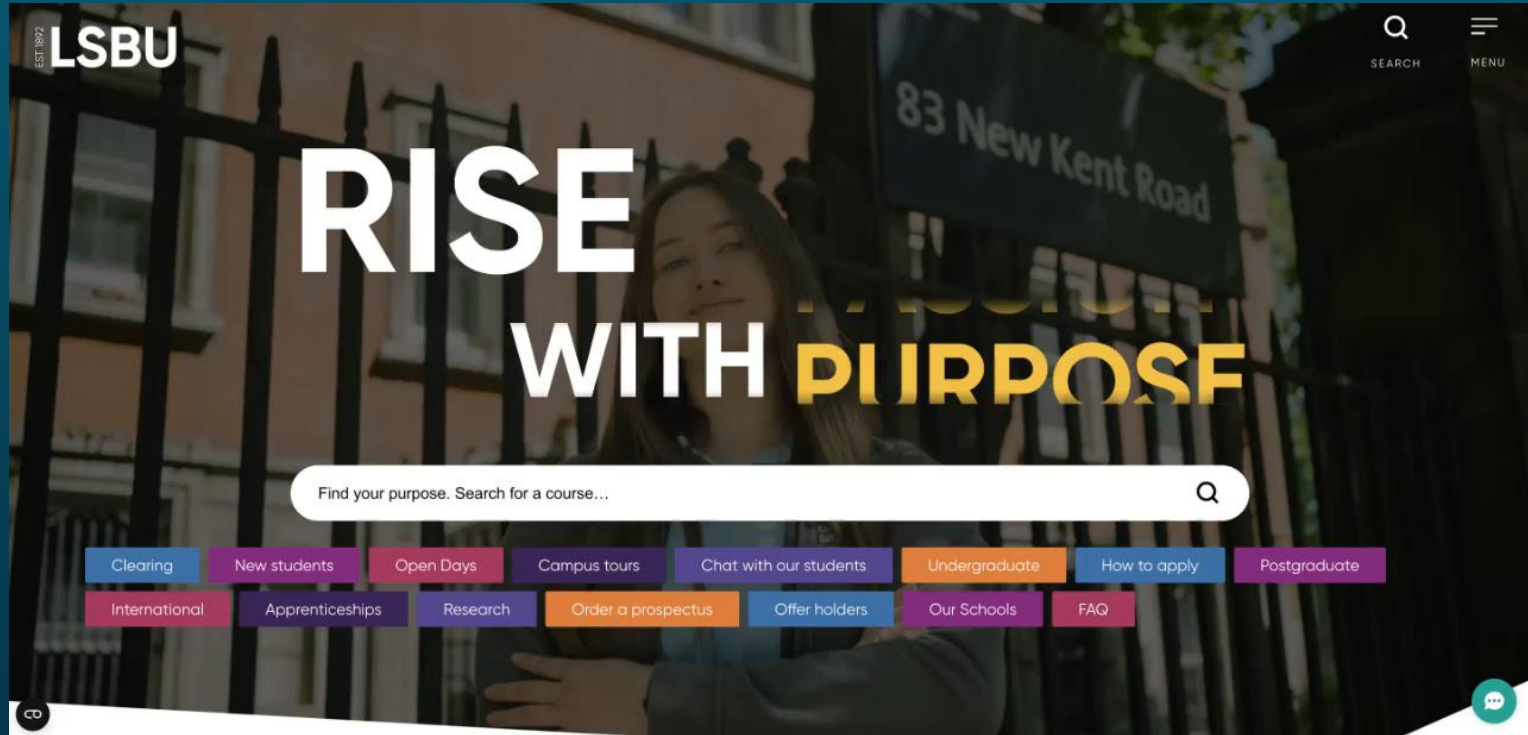
Anonymous Trigger

- Preferred campus location
- Student demographic
- Level of study
- Study subject area
- Degree type
- Commencement date



The Griffith University uses a **self-identification personalization widget** to help prospective students get an experience adapted to their needs.

Personalization using search & self-identification



Set personalization triggers

Authenticated

- Works across channels
- Persistent
- Combines data sources
- Restricts content access

Behind an ID and password

- Login authentication

Personalization using Site Search

The screenshot shows a Chrome browser window with the URL `gonzaga.edu/search?query=nursing`. The search results are displayed in a dropdown menu on the right side of the page. The search term "NURSING" is entered in the search bar. The results list includes:

- SUGGESTIONS
- NURSING
- SCHOOL OF NURSING HUMAN PHYSIOLOGY
- GRADUATE NURSING PROGRAMS
- SCHOOL OF NURSING AND HUMAN PHYSIOLOGY
- DOCTOR OF NURSING PRACTICE
- FEDERAL NURSING LOAN
- ARMY NURSING
- FEDERAL NURSING STUDENT LOANS
- ADVANCED NURSING DEGREES
- NURSING JOBS

The background of the website features a large banner with the text "Illuminate the" and "on" (partially visible). Below the banner, there are two promotional boxes: "SCHOLARSHIP APPLICATIONS FOR 1ST YEAR STUDENTS" and "U.S. NEWS RANKS GONZAGA IN TOP 100". The browser's address bar shows the URL `gonzaga.edu/search?query=nursing` and the page title "Info and tool for students, faculty and staff, including mask & vaccine requirements, FAQs, and more. Visit site".

Objectives

- Communicate to different student cohorts in real-time
- Fast
- Accessible on devices
- 360 view of student info in secure, easy-to-use interface
- Empower student self-service

The screenshot displays the myGriffith student portal for Joshua Werner. The interface includes a navigation menu on the left with options like Home, My program, Finances, My details, Support, Logout, and Provide Feedback. The main content area features a Noticeboard with no messages, a Staff information tile, a Parking tile, and a 24/7 online help announcement. A calendar on the right shows the date 13 Mar 2023, and a My Schedule section displays upcoming key dates and timetables.

Griffith UNIVERSITY myGriffith AskUs Learning@Griffith Library Email

Joshua Werner

Home My program Finances My details Support Logout Provide Feedback

Noticeboard Quick links My links New 0

No messages to display

Staff information tile Various tiles will display on the home page. These tiles will provide key information and link to the relevant site or system. The tiles will change depending on the student's stage in the life cycle and type of student e.g commencing, undergraduate etc. [Learn more](#)

Parking Trimester and Annual parking permits and casual parking options are available for students. Explore parking zones and pricing, cycling information and end-of-trip facilities available to you on campus. [Learn more](#)

24/7 online help now available for Learning@Griffith Your [new Learning Management System \(LMS\)](#), Canvas, is your go-to for all your Learning@Griffith needs. It's where you'll find course content and announcements, submit and receive feedback on assessments, and interact with your fellow students. There is 24/7 online support in Canvas to help you get started. [Log in and explore](#)

13 Mar 2023

S	M	T	W	T	F	S
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

My Schedule University Events

UPCOMING KEY DATES

No upcoming key dates

[View more key dates](#)

TODAY

No upcoming events or exams

[Weekly timetable](#) [Full timetable](#)

Noticeboard

- Displays relevant info in chronological order
- News personalized by student

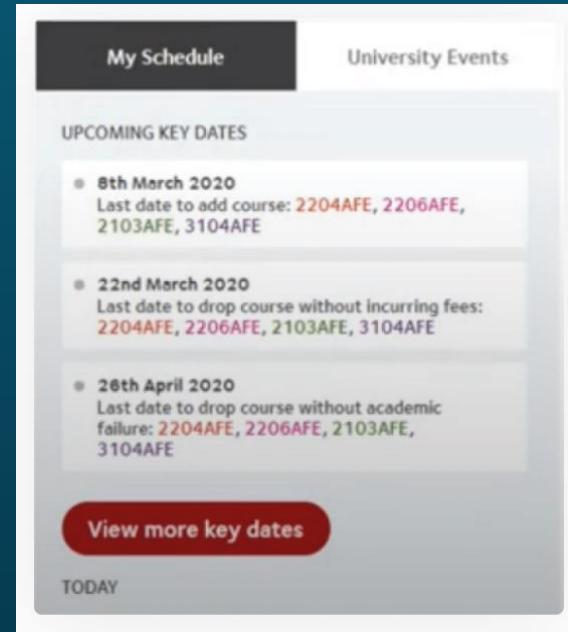
The screenshot shows a user interface for a student named Jolene, a Bachelor of Commerce student. The interface is divided into several sections:

- Left Sidebar (Navigation):** A red sidebar with icons and text for Home, My Program, Finances, My Details, Support, Logout, and Provide Feedback.
- Profile:** A circular profile picture of Jolene and her name and program.
- Noticeboard:** A central area with a "Noticeboard" title, "Quick links" and "My links" dropdowns, and a "New 1" badge. It contains three news items:
 - 20 January 2020 Griffith University:** "One of Australia's leading business educators" with a "Learn more" link.
 - 20 January 2020 Student Life:** "One of our scholarships could help you achieve your dreams" with a "Learn more" link.
 - 20 January 2020 Development & Alumni:** "The Griffith Alumni Community" with a "Learn more" link.A "View more notices" link is located below these items.
- Exam timetable:** A section stating "Hi Jolene, your exam timetable has now been released." with a "View exam timetable" button.
- Orientation Status:** A section stating "You've completed 0%" with a "Continue myOrientation" link and a circular progress indicator showing "0% complete".
- Calendar:** A calendar for "24 Jan 2020 TRIMESTER 3 2019 WEEK 13" with a red circle highlighting the 24th.
- My Schedule / University Events:** A section titled "UPCOMING KEY DATES" with three entries:
 - 8th March 2020:** Last date to add course: 2204AFE, 2206AFE, 2103AFE, 3104AFE
 - 22nd March 2020:** Last date to drop course without incurring fees: 2204AFE, 2206AFE, 2103AFE, 3104AFE
 - 26th April 2020:** Last date to drop course without academic failure: 2204AFE, 2206AFE, 2103AFE, 3104AFEA "View more key dates" button is located below these entries.

Personalization using Authentication

My Schedule

- Upcoming courses, events, important dates
- Limit to 3 upcoming dates to avoid overwhelming students



My Program

- Track degree progress
- Credit points
- Progress bar
- Drill down
- Manage course administration

The screenshot displays the 'My Program' interface. At the top, there are 'Quick links' and 'My links' dropdown menus. Below this, the 'Bachelor of Commerce' program is selected, with 'Program Requests' as a sub-option. The user's 'Award Major' is 'Accounting' and their 'Major' is 'Finance'. A 'Change' button with a pencil icon is visible. The 'Your progress' section features a progress bar indicating '130 OF 240 CREDIT POINTS ACHIEVED TO DATE' and a 'View your program requirements' link. To the right, the 'YOUR GPA' is shown with a 'Reveal' button. The '2019 Trimester 3' section includes 'Previous term' and 'Next term' navigation, and a 'Manage enrolment' button. A table lists courses with columns for 'Course Code', 'Course Name', and 'Convenor'. Two courses are shown: '2106AFE Company Law' by 'Dr Craig Cameron' and '2201AFE Corporate Finance' by 'Dr John Fan'. Each course has an 'Assessments' dropdown and a 'View course profile' link.

Course Code	Course Name	Convenor
2106AFE	Company Law	Dr Craig Cameron
2201AFE	Corporate Finance	Dr John Fan

Personalization using Authentication

My Finances

- Automate payment tasks
- Amount due
- Payment deadlines
- Payment transaction

Results

- 1st week: 52.6% students rated portal EXCELLENT
- 1st year: 500k sessions/mth

The screenshot displays a 'Finances' dashboard. At the top right, there are 'Quick links' and 'My links' dropdown menus. Below the header, a 'B Commerce' tab is active. The main content area is divided into several sections:

- Fee Status:** Shows 'Commonwealth Supported - HECS-HELP loan' with a 'Change your HELP loan' link and 'SSAF Status' with a 'View SSAF status information' button.
- Account Balance:** Displays '\$480.00 due 26 Dec 2019' and a 'View fee breakdown' dropdown.
- Payment options:** Features three cards: 'CREDIT CARD' (accepting Visa, Mastercard, JCB, and American Express), 'BPAY' (with a logo), and 'WESTERN UNION' (pay by credit card or telegraphic transfer).

6 Steps to Personalization



Define user segments



Define personalization goals



Map user journeys



Set personalization triggers



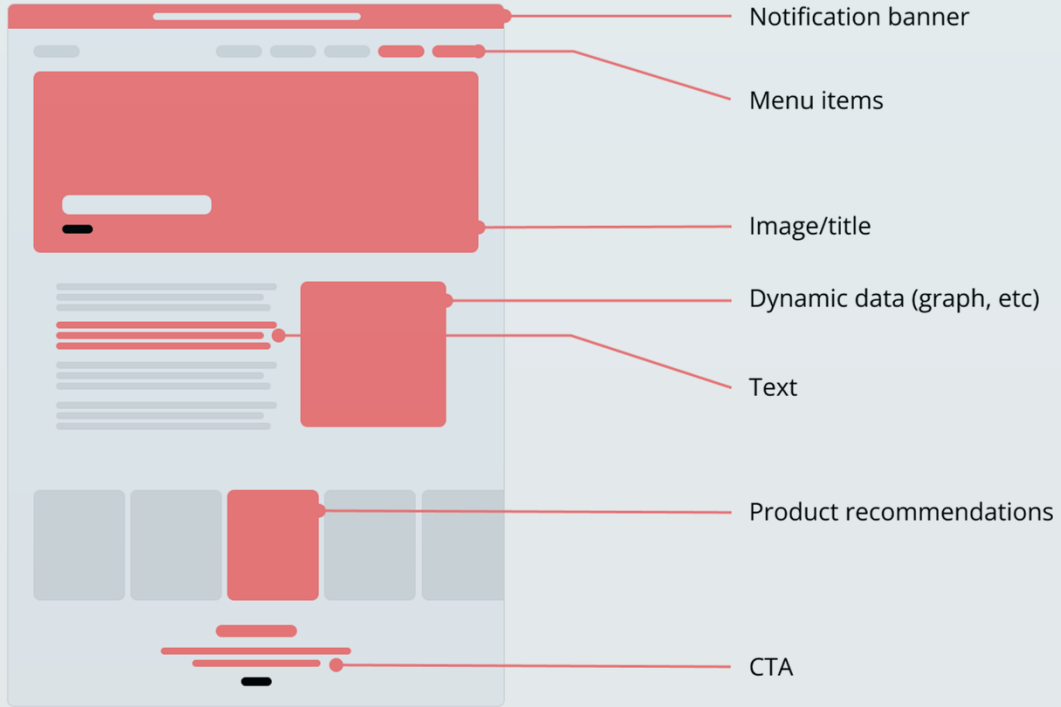
Select content to personalize



Measure results

Step
5

Select content to personalize



6 Steps to Personalization



Define user segments



Define personalization goals



Map user journeys



Set personalization triggers



Select content to personalize



Measure results

Step 6

Step-by-step guide on setting up goals and measuring conversion

Measure results

Analytics | Try searching "measurement ID"

Reports snapshot | Real-time

Life cycle | Acquisition | Engagement | Conversions | Pages and screens: Page title and screen class

Views over time

Views by landing page + query string

Landing page + query string	Views	Users	Views per user	Average engagement time	Event count
1 [redacted]	94	11	8.55	2m 57s	23
1 May - 7 Jun 2023	41	1	41.00	5m 07s	6
27 Mar - 3 May 2023	0	0	0.00	0m 00s	

6 Steps to Personalization

Step
1

Define user
segments

Step
2

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to personalize

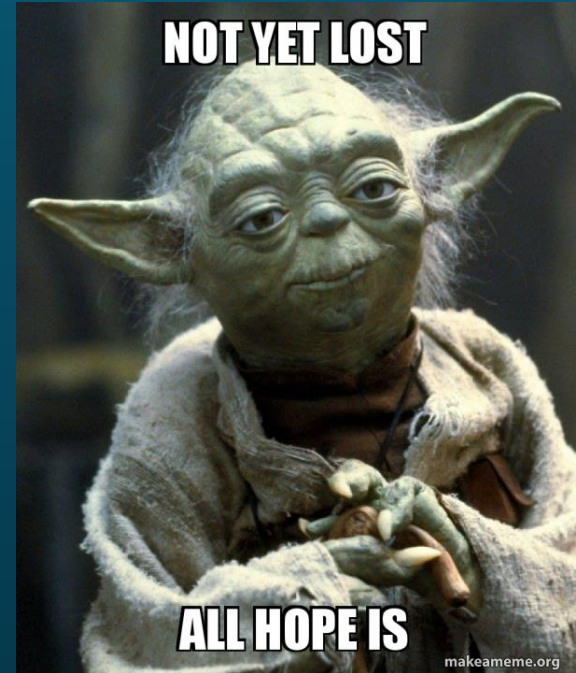
Step
6

**Measure
results**

User segment	Goal	User Journey	Trigger	Personalization	Content	Results
Name of your user segment	What would you like your user segment to achieve? (i.e. increase conversion, download a file, visit a particular page, etc)	List all the pages of events a user will take from visiting your website to achieve their goal.	How would you identify your user segment?	What element of your website will you personalize? List each component for all your pages across your customer journey.	List all the content you have specifically created for your user segment, and where they can be located within your customer journey.	How will you measure the success of your customization?
Group A	Increase conversions	- Visit service page - Submit a form	Visit service page	- Hero banner - CTA	- Group A hero banner - Group A CTA	Conversion rate increased by 13%
Group B						
Group c						

BONUS: Tools to make it happen

- Considerations
 - Increasing data complexity
 - Fragmented data and workflows
 - Cross-channel experiences difficult to measure and optimize



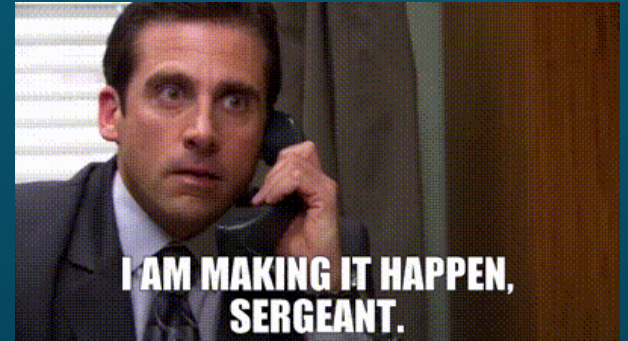
BONUS: Make it happen

- Tech solutions available
 - Customer Relationship Management (CRM) or Student Information System (SIS)

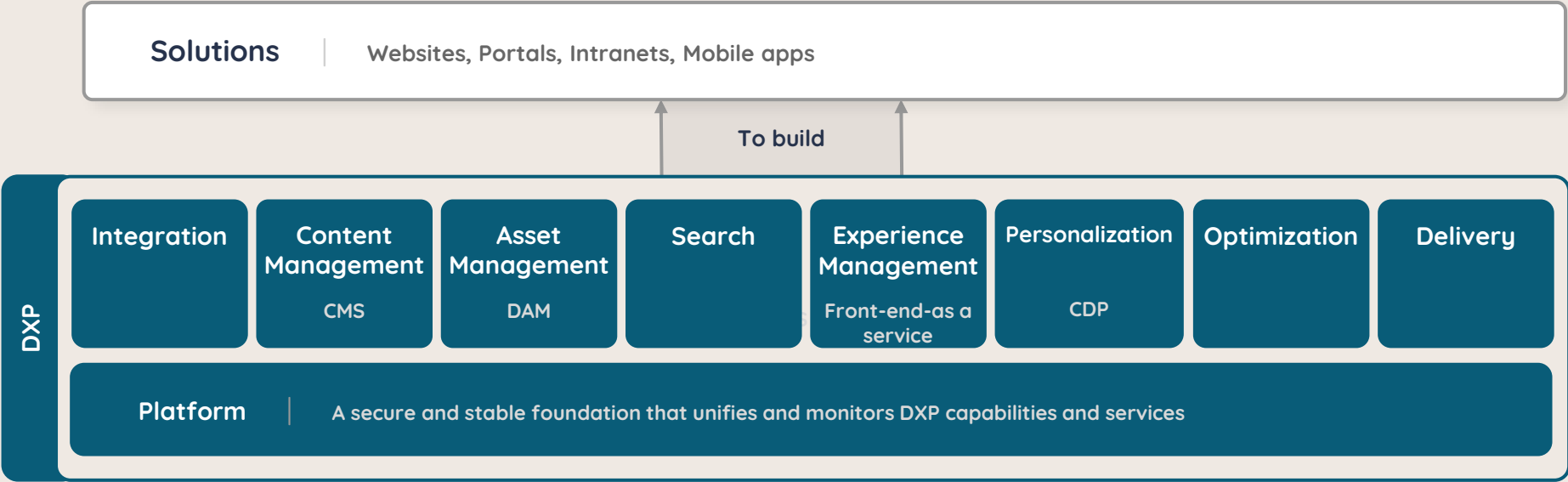


BONUS: Make it happen

- Tech solutions available
 - Customer Relationship Management (CRM) or Student Information System (SIS)
 - Digital Experience Platform (DXP)

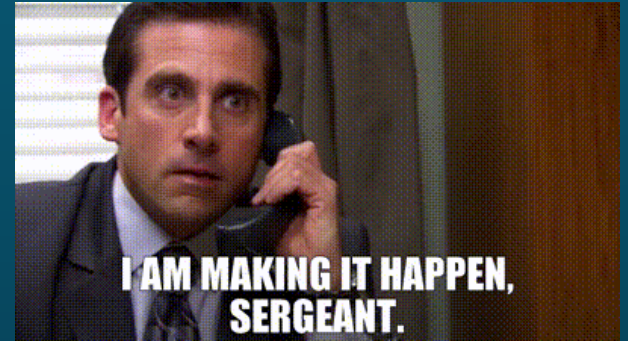


Squiz Composable Digital Experience Platform (DXP)



BONUS: Make it happen

- Tech solutions available
 - Customer Relationship Management (CRM) or Student Information System (SIS)
 - Digital Experience Platform (DXP)
 - Customer Data Platform (CDP)
 - Collect
 - Unify
 - Share
 - Trigger personalization



Buck the overcomplication trend

- Start small.
- Do it quickly, learn.
- Pick the right tools.
- Iterate and show results.



Thank you!

Squiz.net

