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# Digital Personalization in Higher Ed

An actionable plan for delivering targeted content to your audiences



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What's Inside:

- What is targeted content delivery and why should I care?
- How do I segment my database and build personas?
- What data do I need to be prepared for digital personalization?
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- Do I need to invest in additional marketing technologies or staff?
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# A New Era of Personalization

What is targeted content delivery and why should I care?



Digital personalization refers to creating dynamically personalized, highly-relevant experiences for visitors across multiple channels. We use this term interchangeably with targeted content delivery.

It means understanding and meeting their interests, tailoring your digital content to fit their profile, and providing the best message or offer that's relevant to them.

Digital personalization is real-time changes to your content based on one or more visitor attributes:

**IP address.** Shows a person's general location and company name. Enables you to personalize by geolocation, vertical, or account.

**Form fills.** Data collected when an anonymous visitor transmits information via a form submission.

**Behavioral.** Certain tools can build a behavior-based profile, capturing how a visitor navigates your site and engages with your content.

Prospective and current students, parents, coaches, alumni, and donors are expecting more from you. In today's climate of non-stop innovation, the digital experience you offer is a differentiator.

**84% of students who received personalized communications during their application process agree that it was an important factor in their choice of school.** <sup>[1]</sup>

Furthermore, personalization can help you better understand the recruitment funnel and interact with individuals who would otherwise wait until applying to identify themselves.

Now is the time to explore your path to personalization. While you'll start with rules-based personalization, adoption of AI technologies is growing, and individuals believe they present positive opportunities for society. <sup>[2]</sup>

This white paper examines the evolution of digital personalization, how to get started at your institution, and how to maintain privacy and earn trust, particularly among Gen Zs.

# Understanding the Individual

## How do I segment my database and build personas?

A persona is an abstract, semi-fictional characterization of a market segment based on both research and collected data.

In the past, personas were built using demographic data like age, race, and gender. But that doesn't tell us anything about their preferences or how they make decisions. Truly meaningful personas are constructed with motivators and behaviors in mind. <sup>[1]</sup>

A detailed persona will help you focus time and efforts and attract the most valuable visitors, donors, alumni, and potential students to your institution.

Additional benefits to persona creation include:

**Content that makes an impact.** If you're aligned with your audiences' interests, you'll gain their attention—and their trust.

**Increased readership.** If you know where a group prefers to consume content (social media, for example), you'll know how to optimize promotion techniques.

**Consistency among the institution.** With a common nomenclature, different departments can speak the same language when talking about students, donors, alumni, etc.

**Better courses.** The more you know about your prospective and current students, the more you can tailor their academic experience. <sup>[2]</sup>

There are numerous groups within the higher education ecosystem. High schoolers, parents, teachers, coaches, adult learners, graduate school candidates, current students, alumni, donors, faculty, press, and more come to mind.

But don't feel overwhelmed. The number of personas you create should be directly correlated to your marketing strategy. Focus on the five (or fewer) that will help you meet your marketing goals.

When building personas, consider:

**Demographics.** How old are they? Where do they live? What's their current education level?

**Identifiers.** What do they do for fun? Do they work? Where do they consume content?

**Challenges.** What hardships or challenges do they face? What might prevent them from scheduling a tour or applying?

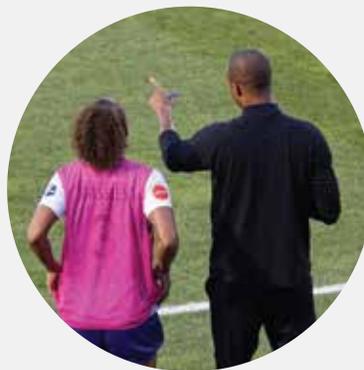
**Goals.** What type of academic experience are they looking for? What social opportunities are interesting to them?

Finally, in an effort to create a seamless personalization experience across channels, connect website visitor data with your tech stack. Let the data build over time and guide your future marketing strategy.



**Traditional Undergraduate**

Ashlyn is a 17-year-old high school student from California. She is actively engaged in volunteering activities. She is interested in law school and wants to attend an undergraduate institution with a robust pre-law program.



**Influencer**

Mike is an English Teacher and soccer coach at a public school in Texas. He does not have much time to research colleges, so he mostly relies on schools' reputations and his personal knowledge when making higher education suggestions.



**Graduate Student**

Elle is a 33 year old professional living in Atlanta with ten years of experience in sales and marketing in the technology industry. She wants to pursue an MBA to earn a promotion and manage a high-performing team.



# Prerequisites to Personalization

## What data do I need to be prepared for digital personalization?

Once you know more about your visitors and have personas defined, it's time to collect data. It's the cornerstone of any successful digital personalization effort.

Beginner metrics are used most often for personalization. It's tough to overcome data issues and get more in-depth, so you're not alone if you struggle here.

**40%** of marketers are unable to personalize because of inability to link data across disparate technologies.

**80%** don't understand customers beyond basic data.

**96%** face challenges when building a single view of a customer. <sup>[1]</sup>

But once you increase effort and dollars on personalization, it's time to challenge yourself and seek advanced information.

Knowing how your most active segments interact with your site forms the framework of your personalization campaign. Once you layer in goals, you'll know what elements to personalize and what content to offer.

### Step One

To start, take a thorough look at your Google Analytics data. This will help you identify least and most popular pages, how visitors arrive on your site, how long they spend consuming content, and much more. Heat map providers like Lucky Orange are also worth exploring.

### Step Two

A/B test different versions of your website to find your strongest performing assets such as headlines, articles, menus, buttons, images, and forms. Analyze what visitors are clicking on, what they are viewing, and what they are interested in. And take your time with this—don't rush and force invalid results.

This will help you build a library of high-performing assets to use in your personalization campaign.

And there's no doubt this takes time. But, to illustrate its importance, in 2012 Bing's revenue increased by 12% after an engineer launched a simple controlled experiment to test two versions of the company's headline. <sup>[2]</sup>

### Step Three

This step is optional, but if you're testing minor tweaks or pages with high traffic, consider multivariate testing where more than one page element is changed.

# Where to Start Personalizing

Which digital channels should I start with and how do I scale?

The most common channels used to serve personalized content are the web, email, and mobile.

To scale up from there, consider running personalization campaigns across paid advertising, The Internet of Things (smart watches, kiosks, etcetera), and to individuals using voice search platforms like Alexa and Siri.

But, let's start with the fundamentals. Even with limited knowledge about an individual, you can serve content that matches their intent.

Keep your personas in mind and start with those that will be most impactful to the institution.

Similarly, start with the channel(s) that will meet your most pressing business needs and deliver impact quickly.

And finally, remember that we're on a journey from "one to all" to "one to some" to "one to few". You're not Amazon or Netflix. Getting started with a few simple callouts on your homepage is a big step in the right direction.

Here are a few examples of how to get off the ground with digital personalization.



## Web

Invite an anonymous visitor a local meetup based on their geolocation

Offer an application checklist upon an individual's third visit to a program page

Present an area of study based on the keywords used to land on your site



## Email

Show a headshot of a local admissions counselor in the signature block

Match landing page content to personalized emails

Send a behavior-triggered email based on website pageviews



## Mobile

Remove supplemental content or heavier images for a streamlined mobile experience

Use a flat style design to make links easily clickable

Send a personalized notification to re-activate a dormant app user



## Advanced

Request a deposit from an admitted student via a site popup

Encourage admissions counselors to reach out personally when certain prospective students view the site

Personalize a video with a name, photo, or other variable you have in your CRM <sup>[1]</sup>

# Maintaining Privacy to Earn Trust

Colleges and universities practicing personalization techniques must be vigilant about maintaining visitor privacy.

Abiding by the legal guidelines of The European Union's General Data Protection Regulation (GDPR) and the new California Consumer Privacy Act of 2018 are paramount, but marketers should also understand that not everyone welcomes personalized marketing messages.

75% of consumers find most forms of personalization a least somewhat 'creepy'.<sup>[1]</sup> It's something that higher ed marketers can't afford to underestimate.

Most qualitative feedback from that study noted asking an individual to share personally identifiable information as a 'creepy' offense. Requiring a phone number to complete an early-stage transaction, or an app that connects to your location and contacts, are tactics that should be avoided.

But the most invasive technique? Sending targeted content based on an individual's real-time physical location.

Conversely, 45% of respondents indicated that the coolest personalization tactic used by brands today is receiving an apology email after a poor in-person or online experience.

In many cases, misgivings in the data-value exchange stem not from using data to deliver personalized experiences, but rather a lack of trust in how companies protect their personal information.

**48% of customers believe companies do a bad job protecting their identifiable information.** <sup>[2]</sup>

Compared to Baby Boomers and Gen Xers, Millennials and Gen Zs have the highest affinity for personalized recommendations. Gen Zs are 25% more likely than other generations to provide personal information to gain a more predictive online experience. <sup>[3]</sup>

But just because Generation Z is fueled by technology, don't assume that they are naive or indifferent to how their information is collected and used.

**66%** of Gen Zs said fear of my data being compromised has increased over the past two years.

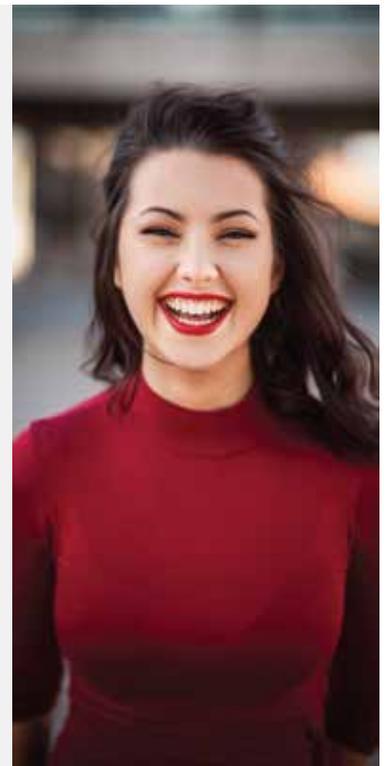
**46%** said I am uncomfortable with how companies use my personal information.

**37%** said I am confused about how companies use my data. <sup>[2]</sup>

## How do I remain non-invasive and respect a visitor's privacy?

Catering to an individual's desire for a personalized digital experience while respecting their privacy may seem counterintuitive. But there are techniques to solve this challenge:

1. Give control over what information is collected
2. Be transparent about how information is used
3. Show a commitment to protecting information
4. Have a strong privacy policy
5. Ask for explicit consent to use information
6. Don't share information without permission
7. Explain how data translates to a better experience
8. Use information to create a distinct experience - make it worth it!



# Evaluating Personalization Providers

Do I need to invest in additional marketing technologies or staff?

Implementing a digital personalization strategy is traditionally accomplished in one of two ways: within your content management system or via a third-party platform. Either way, the tool should fit the strategy, not the other way around.

Responding to the market, content management and personalization platform vendors alike are investing heavily in sophisticated machine learning and artificial intelligence to better meet expectations for personalized content across channels.

Through APIs and improved native integrations, personalization platforms can now ingest and integrate data from a wide range of sources, combining demographic, geographic, and behavioral data for both known and anonymous users.

There are seven considerations to help you evaluate business needs, staff capabilities, management support, and financial resources before selecting a tool.

## 1. Where are you on your personalization journey and what capabilities do you need now?

Prioritize platforms based on how their feature set matches up to your most-pressing personalization needs. If you're getting started with the web, focus on that. If you're ready to personalize across The Internet of Things, you might need an enterprise system.

## 2. Who will use the platform and do we have the right team in place?

A common blocker to personalization success is misaligned staffing models or skill sets. Make sure there is synchronization across individuals, with leadership buy-in as well.

## 3. How much training will we need?

If you can't or don't want to hire new staff, consider a vendor with premiere support and professional service offerings.

## 4. Can we integrate with our existing digital tools, particularly the content management system?

It's important to find out if the integration points you desire are possible with your current architecture.

## 5. What are our reporting needs?

What do your various stakeholders need to make better decisions and drive revenue?

## 6. What is the total cost of ownership?

Many personalization platform vendors run a subscription model based on features and usage, so it's important to craft a dynamic budget based on different scenarios.

## 7. How will we define success?

Make sure the success warrants the investment. Example KPIs include increasing international student enrollment and driving donations. <sup>[1]</sup>



# Examples in Higher Education

Who is currently doing personalization right?

Brandeis University customizes the homepage hero image and latest stories based on the visitor's indicated interest in Medicine.

The screenshot shows the Brandeis University homepage. The top navigation bar includes links for ACADEMICS, ADMISSIONS & AID, RESEARCH, ATHLETICS, STUDENT LIFE, ARTS, and ABOUT. The main hero image features a cracked egg with a plant growing from it, titled "The Next Big Thing". Below the title is a text block: "New cancer drugs? Better student loans? Brandeis entrepreneurs are hatching ideas and building companies that may change the world." and a button labeled "READ MORE ABOUT THEIR WORK".

Below the hero image is the "Latest Stories" section, which is personalized for a visitor interested in Medicine. It features four story cards:

- Open to all: Ribbon cut at Skyline Residence Hall** (Image of a ribbon-cutting ceremony)
- Four elected to Brandeis University Board of Trustees** (Image of the Brandeis University seal)
- Stuart Altman named winner of National Academy of Medicine's Lienhard Award** (Image of Stuart Altman, circled in red)
- Focus turns to Professor Anita Hill as Kavanaugh accusations unfold** (Image of Professor Anita Hill)

Visit <https://www.brandeis.edu>

# Examples in Higher Education

Who is currently doing personalization right?

Bryant University's interactive Program Path enables visitors to self-select a major and minor to see a potential career path and employer.



The University uses personalization in its forms as well, presenting visitors with their local counselor based on their state.



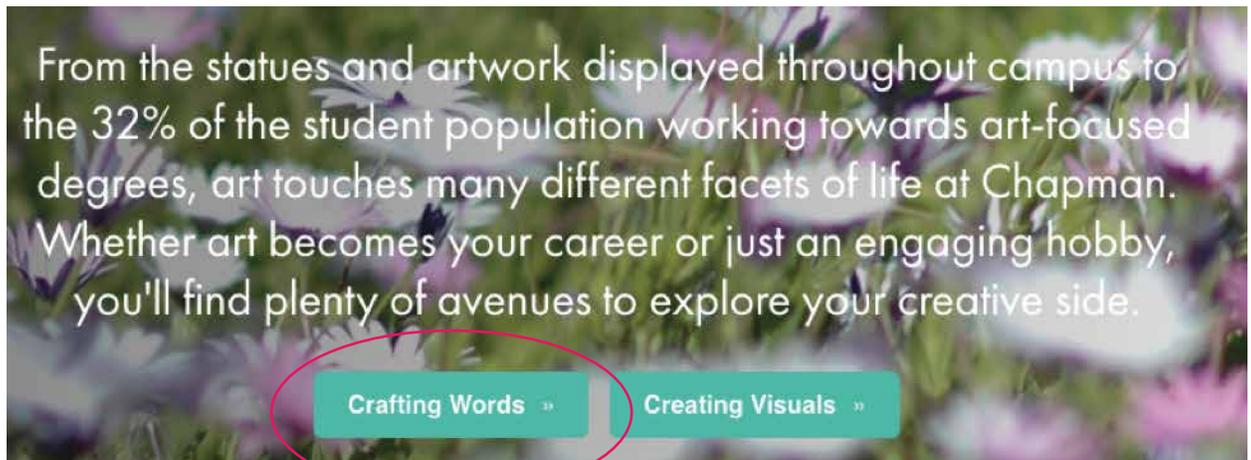
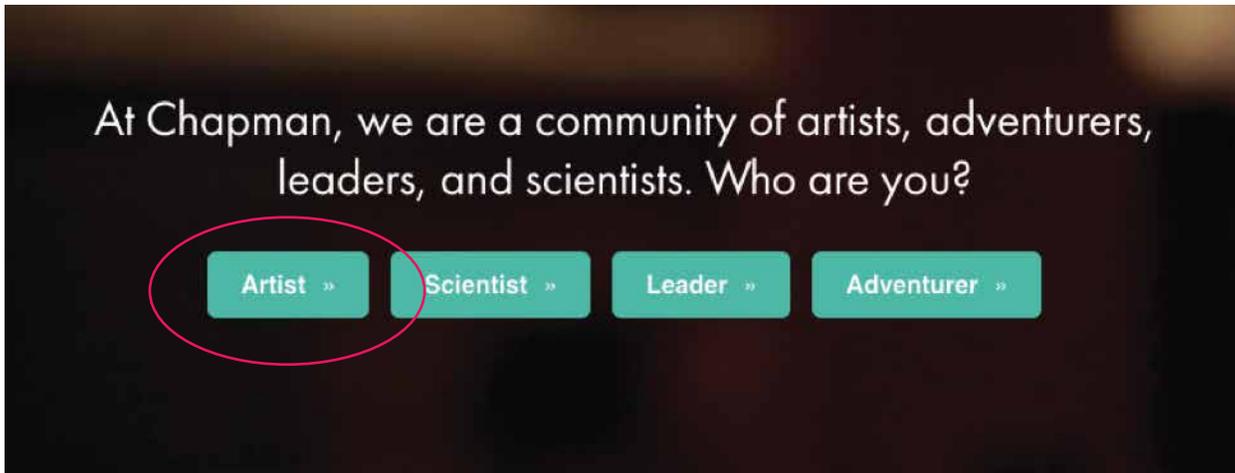
Visit <https://www.bryant.edu>

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# Examples in Higher Education

Who is currently doing personalization right?

Chapman University guides visitors to a personal and engaging experience by capturing expressed interests.

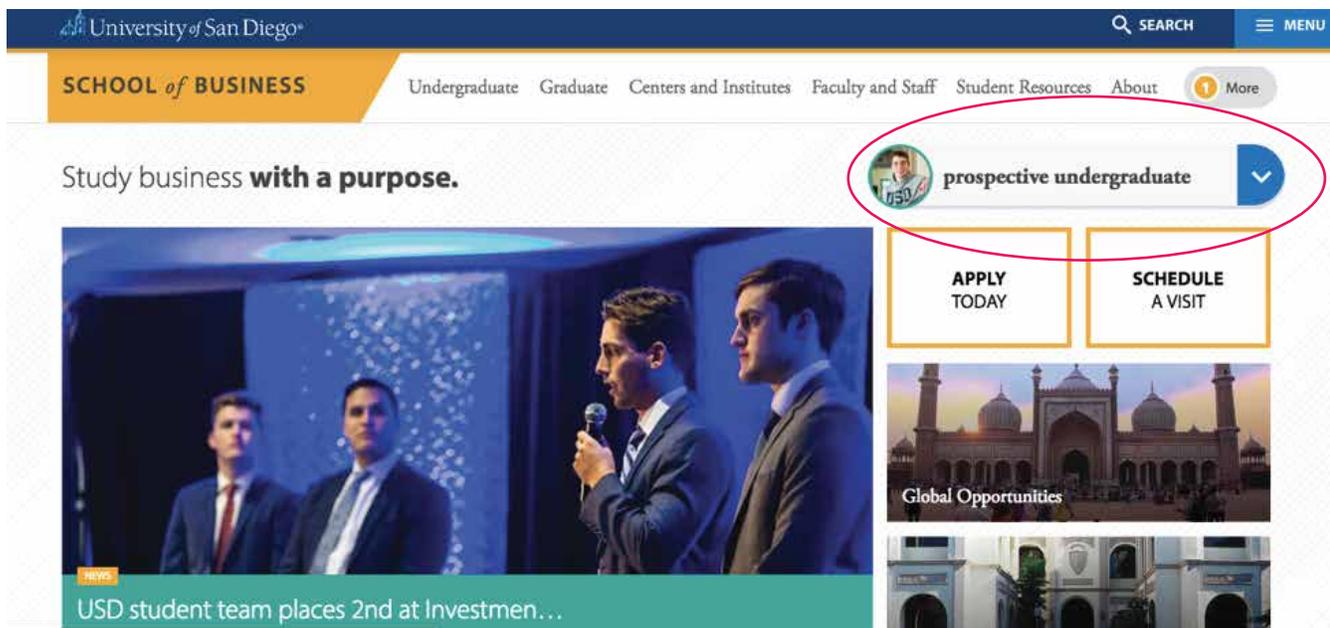


Visit <https://www.chapman.edu>

# Examples in Higher Education

Who is currently doing personalization right?

The University of San Diego uses explicit personalization by allowing visitors to identify themselves, prompting the site to deliver targeted content.



Visit <https://www.sandiego.edu>

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# About Us

Founded in 2001 and based in Atlanta, Georgia, Cascade CMS by Hannon Hill is the #1 most-used enterprise web content management software among colleges and universities.

Our content management system is currently implemented by over 300 prominent institutions in the United States, Canada, and around the world. It powers over 25,000 sites, supports 100,000 users, and houses over 6,000,000 web pages.

And those numbers continue to grow each day.

Throughout our 18-year history, we've consistently introduced features that make managing digital content easy and simple. Your needs guide our choices. Everything from our product roadmap to our service offerings reflect a commitment to your success.

We are focused on creating features that allow teams to accomplish more together. We're proud to work with organizations large and small, and to know that Cascade CMS can help you.

To experience Cascade CMS firsthand, please contact our team of solution consultants by emailing [info@cascadecms.com](mailto:info@cascadecms.com). We are happy to show you how your organization can benefit from making the switch to Cascade CMS.

## Cascade CMS by Hannon Hill

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