Case Study: HP Deploys A DMP To Harness Audience Data

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WHY READ THIS REPORT

Hewlett-Packard, a leading technology provider with a global footprint, saw an opportunity to significantly improve its digital marketing efforts by creating a universal framework for user-level data collection and usage. Read this case study to find out how HP partnered with its global media agency, Omnicom Media group (OMG) and deployed BlueKai's data management platform (DMP) to help standardize and centralize the management of its data assets in the US and more effectively target and message to users on-site and off-site. Based on promising results to date, HP will expand the DMP implementation globally.

DATA, DATA EVERYWHERE, AND NO ACTIONABLE CUSTOMER TARGETING IN SIGHT

Hewlett-Packard is a leading provider of technologies — from printers to computers — around the globe, with a presence in 170 countries. For such a global organization, coordinating digital marketing efforts can be a challenge: HP has thousands of marketers around the world — not to mention folks in groups like site operations, legal, privacy, and analytics with whom they interface — who were all in need of a standardized way to collect, segment, and utilize data while adhering to robust security protocols and privacy safeguards.

Challenge: Digital Marketing Was Hampered By a Lack of Actionable User Insight

HP's Mabelle Artz, senior manager, digital marketing, is tasked with bringing new technologies and innovations to her digital marketing colleagues across HP to improve the effectiveness of their media investments. She knew that a better understanding of HP's site visitors would be critical to improve both media and site-side performance across the organization. But she realized their current tools and internal processes — which were disjointed and inconsistent across HP (as seen in many large organizations) — could be improved. Artz spoke to colleagues throughout HP to understand why data collection and usage (through the use of action tags, for example) was so fragmented and learned that:

- **Data management silos existed throughout the company.** In speaking to her peers about what limited their use of HP data, Artz heard about privacy concerns and fears around IT security, limiting some business units' adoption of third-party tags. She also heard from others that their site analytics tools and media campaign tracking tools didn't speak to each other, hampering their ability to tie key sets of data together. HP was in need of a change, but needed a central group to take the reins to move things beyond the status quo.

- **Processes for digital data collection and usage were not standardized companywide.** Lacking a centralized approach to data collection and usage, there were holes in current data collection efforts.

For example, individual business units and constituents made individualized decisions about tag deployment based on their own particular rules and needs, which resulted in inconsistent tagging across the HP sites and an incomplete picture of holistic user behavior.

■ **No common technology platform.** Within HP many different groups controlled their own marketing dollars and campaigns. As a result, there was no central repository that captured data companywide. This not only limited data sharing, it forced employees to use time-consuming and suboptimal manual processes to make sense of disparate data sets: "People were using spreadsheets to do matching," notes Artz.

The Fix: HP and OMG Brought In BlueKai To Help Collect And Manage Digital Data

In close partnership with her global media agency, OMG, Artz determined that a data management platform (DMP) could be a useful solution to her organization's current challenges. Features like universal tag management (including security and privacy controls), holistic data collection and normalization, segmentation capabilities, and the ability to plug into key digital channels such as display would allow for improvements in insight and targeting.[1] Says Artz, "We needed a pan-HP perspective everyone could turn to to figure this stuff out." But moving from concept to deployment required a significant amount of time, education, and patience. She had to:

■ **Reframe the value of a DMP for individual stakeholders.** Artz knew that key stakeholders in groups like privacy, media, marketing, and website operations would buy into the concept if they understood how a DMP could help make them more successful in their individual roles, for example by increasing site security, site, and media performance. From a more holistic "pan-HP" perspective, even the CMO — for whom it's all about connecting current and future customers with the HP story and constantly improving the bottom line — was looped in (see Figure 1).

■ **Develop a detailed implementation plan.** Next up, Artz and her team worked with OMG's Platform Logistics team, BlueKai, and several internal groups (including IT, privacy, legal, cyber security, and website operations) to create a plan for US deployment. This required that they have a deep understanding of the DMP from a technology standpoint, ensure that their implementation followed internal and external compliance guidelines, and think through the business rules that would dictate its use (such as what role HP, OMG, and BlueKai would each play in deployment and ongoing management). The analytics team was also heavily involved, as they were ultimately responsible for the deployment of the DMP platform across the US site (see Figure 2).

■ **Start collecting data and building segments.** With the tags in place, data could begin to flow. But developing a classification system that made sense was critical. BlueKai's "librarians" (experts in data collection and classification of this kind) were primarily responsible for this task, using BlueKai's DMP categorization technology as a foundation on which to build, with

heavy input from HP and OMG's Platform Logistics team. This process took roughly three months. Artz found BlueKai's classification structure quite flexible — for example, she likes that there are a range of conditions one can set which dictate whether or not a tag fires (and hence, does or doesn't add a bit of user data to a given segment) in a given instance.

Figure 1 Artz Focused On A DMP's Diverse Strategic Benefits To Sell Her Colleagues On It
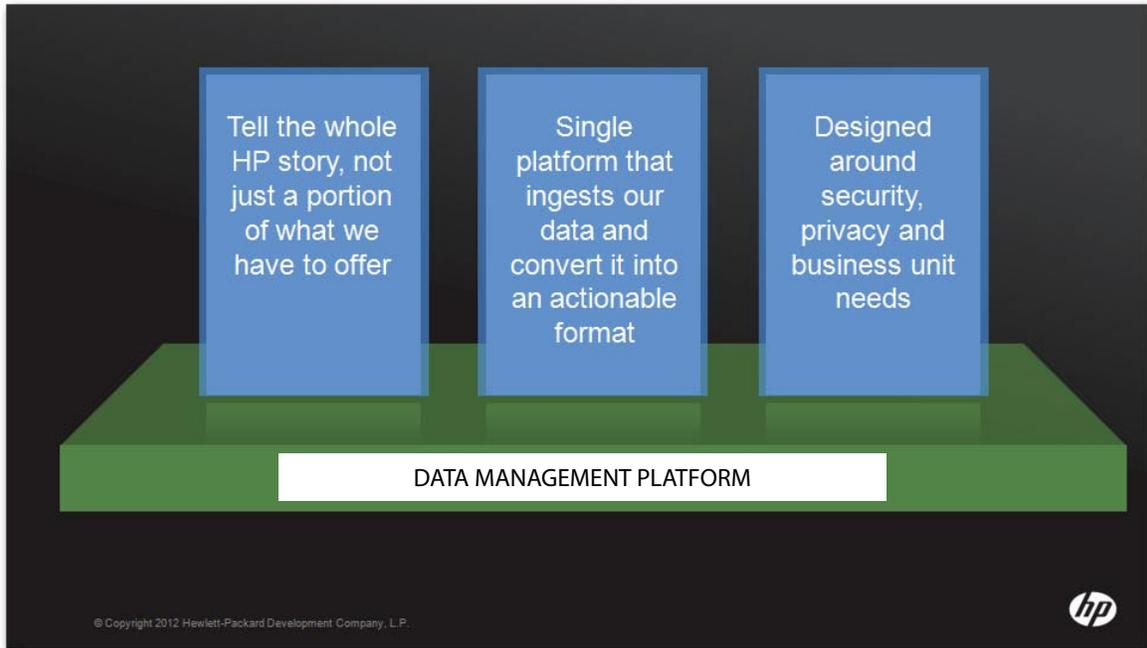
Source: Hewlett-Packard

70190   Source: Forrester Research, Inc.

Figure 2 Implementation Took Time And Required Multiteam Participation

Pricing model	Time to implement	Key stakeholders involved	Data collection and classification process
Since a primary use of the DMP is to influence and improve digital media campaigns, HP opted to create a "pay for play" pricing model among its business groups out of the gate, where DMP cost would be directly associated with ad spend.	Artz spent months educating key stakeholders prior to testing. Then HP went through a multimonth period of testing prior to official deployment. Data was available to be used about 3 months after that.	The DMP program team was responsible for getting buy-in and approval, working with multiple stakeholders — legal, privacy, website operations, marketing, media, BU leaders — in order to ensure that the DMP was both understood and embraced and fully in compliance with HP's policies and local laws and regulations.	BlueKai tags were deployed across the HP US website to enable data collection. A combination of technology- and human-based work went into the classification of data into segments for eventual usage.

70190   Source: Forrester Research, Inc.

The Results: Improved Site And Media Performance, Coupled With Richer Insights

HP has reaped significant rewards since the initial deployment of the DMP in the US, with many more expected. It is seeing improvements in site performance due to a reduction in tag-related issues; its operational efficiency is on the rise as smarter, more automated tools replace manual processes; its media campaigns are getting more sophisticated; and all of the insights that it's gleaning promise huge benefits for groups well beyond media.

■ **Universal tag management is improving site performance and operational efficiency.** HP began to reap the myriad benefits of a tag management system right away.[2] Says Artz: "It has provided us the ability to schedule tags without the need of IT or a developer's time and timelines. In addition, the BlueKai DMP has a feature called User Experience Guard which allows us to monitor tag latency and set thresholds for maximum load time. We are also able to selectively determine what data to pass to partners."

■ **Highly effective audience targeting efforts are on the rise.** The data collection and segmentation capabilities that come with a DMP are fueling increased adoption of both site-based remarketing — arguably the most valuable display tactic available to digital marketers — and audience targeting, now more effectively targeting user segments based on inferred interest, for example.[3] As Artz explains: "The additional insights and capabilities from the DMP are enabling [our] marketers to utilize [new forms of] data for [new] types of campaigns, so they have begun to allocate a percentage of their budgets toward these types of activities. Our upcoming campaign reporting will reflect results in terms of media savings and reinvestment."

■ **Deeper understanding of user behavior will drive better user experience.** HP is constantly on the lookout for ways to innovate — to improve both its customers' experience with the HP brand, and the efficiency and effectiveness of HP's own communication efforts in improving the bottom line. To that end, it sees the value of a DMP as extending well beyond their media efforts. For example, Artz noted: "We'd like to take the learnings [from the DMP] and apply them to how we serve content on our website."

What's Next: Make The DMP A Core Component Of Global Digital Marketing Efforts

Based on early success seen in the US rollout, in the long run, Artz fundamentally believes the DMP will more than pay for itself. HP's ultimate vision is to have one centralized, globally adopted platform for management of all of its key data assets — from media, site-side, and offline — and to use that to drive much more fluid cross-channel planning, budgeting, and optimization than exists today. In the meantime, to make this a reality, Artz continues to focus on education and evangelizing — with more than 7,000 marketers and a web presence in 118 countries, this is no easy feat. Next up, HP will:

■ **Expand the DMP implementation to its top markets.** HP implemented the DMP in the US first and plans to use the key learnings from the US implementation to help drive smooth adoption around the globe (see Figure 3). Artz notes, "We are in the process of defining [our global] road map. We will need to determine how resources in [other] regions align with the plan. For countries in EMEA there will be additional challenges due to new laws and regulations around customer privacy.[4] We will likely need additional processes in place as well as custom implementation."

■ **Encourage additional teams to use the DMP in media campaign planning and execution.** HP focused first and foremost on data collection and segmentation to start gaining insight into user behavior, and then started to deploy smarter media campaigns as a result. Not every team inside HP is taking advantage of this yet, but efforts are underway to drive further adoption. According to Artz, "Internally we'll engage with various marketing teams and will be sharing best practices from campaigns that have already begun to utilize the DMP. We'll also foster and facilitate those conversations among the different marketers. In addition, our agency will introduce these tactics in quarterly planning meetings, and the DMP program team will be available for additional support as needed."

■ **Use the DMP to improve more than just media efforts.** Eventually, HP plans to use the DMP to help teams outside of media. In fact, it has had discussions with site architects, CIOs, and others who are very excited about the potential they see with a DMP in helping with their particular challenges. Artz notes as well, "It's creating really good collaboration and information sharing [across HP]. It's great when a site architect says, 'explain to me how media and media buying works.' It's created deeper context for people throughout the organization."

■ **Incorporate offline data into its segmentation efforts.** Now that it's begun deploying site-side tags in the US and plans to expand this deployment globally, HP is looking to additional forms of data it can incorporate into its DMP-based segmentation. HP's tremendous offline data assets, for example, offer huge potential. Artz notes: "After we get the basics — enhanced digital media campaigns — then what? How do we marry offline data with first-party data, for example? We won't reach nirvana instantaneously. We just keep an eye on the ball and make sure the tactics being put in place continue to drive in that direction."

Figure 3 Global Expansion And Increased US Adoption Comes Next
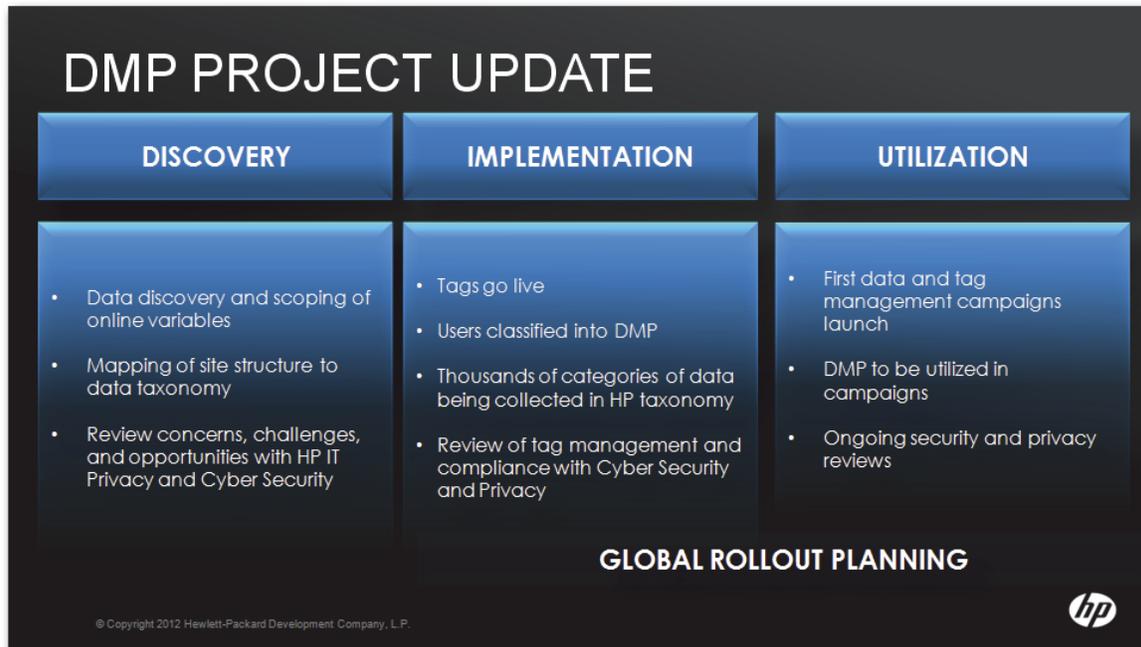
Source: Hewlett-Packard

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Source: Forrester Research, Inc.

ENDNOTES

[1] The data management platform addresses the key challenges facing an interactive marketer wishing to use a segment- or audience-based approach to digital marketing. The power comes from taking a unified approach to audience buying and management by relying on a centralized system for gleaning audience insights as well as accessing and combining different data sets together to create unique, meaningful segments that can be made actionable across digital channels like display, on-site, and email. See the July 25, 2011, "The DMP Is The Audience Intelligence Engine For Interactive Marketers" report.

[2] Customer intelligence (CI) professionals and interactive marketers have a tag management problem. JavaScript tags are omnipresent on websites, supporting a wide variety of analytics, marketing, and technical services. But implementing and maintaining tags is a constant battle, and in many cases the tags are winning, putting marketing, measurement and site effectiveness at risk. Firms should conduct a website tag audit to determine whether tag management is a significant risk factor. In the case of complex websites or those with an extensive tag footprint, investing in a tag management system yields multiple benefits based on efficient processes and accurate tracking. See the December 22, 2010, "How Tag Management Improves Web Intelligence" report.

[3] New upstarts like Dotomi and FetchBack have recently invigorated interest in the value of remarketing, but it's a tried-and-true display tactic that's been around for years. Marketers can significantly improve the scope and effectiveness of their remarketing efforts by taking advantage of additional digital touchpoints, employing best practices like developing a segmentation strategy, aligning creative with remarketing segments, and choosing media partners — the type and the number — based on individual needs and objectives. See the March 11, 2011, "Remarketing Done Right" report.

[4] Governments are placing pressure on interactive marketers, in most cases by mandating clear rules around how customer data is obtained, used, and stored for marketing. While interactive marketers must legally respond, they should also take the opportunity to go further and recognize new paradigms of consensual targeting. Why? Because consumers don't always see targeting options as simply black and white and stand to benefit from a more nuanced approach. This document not only challenges brands, publishers, and targeting services to offer a clear, transparent privacy solution, but also outlines an approach to the privacy dialogue that not only reassures customers but deepens their connection with the message. For more information, see the January 13, 2012, "Privacy Laws Force Rich Dialogue With Customers" report.