The Science of Seeking Your Customer

ALEXIS SANDERS
Senior SEO Manager, Merkle

@AlexisKSanders
What are we going to get into today?

1. What?
2. Why?
3. When?
4. Where?
5. How?
What?
Finding an audience is ...
Finding an audience is ...

- micro
- macro
Finding an audience is ... multi-faceted
Finding an audience is constantly evolving.
Finding an audience is ...
At the core it’s about understanding...

who are they?

why do they buy?

what do they need?

what queries are they using?

what is their journey?

what matters to them?
Key questions to answer:

Key Information?
Personal Core?
Product?
Relationship w/ Tech?
Key information

- What are key demographics that affect decisions?
  - age
  - gender
  - income
  - location
  - # of children

- What are the top 5 adjectives describing the audience?
Personal core

- What do they want in life?
- What are some of their motivators in life?
- What do they value and see as a self-concept?
- What attitudes do they have?
- What are their cited interests?
Product related

- How do you win over this group?
- What do they want?
- What do they look for in terms of the products?
- Top competition
  - e.g., [I am most likely to buy product/service from: ...]
What is their relationship with technology?
What is their relationship with your website?
What is their annual spend on the product/service?
Where are they engaging online?
How do users engage with different forms of digital media?
Context changes the conversation.
Context helps us ...

- Ask the right questions
- Target what drives to decisions
- Identify where to find online and off
- Determine how to engage
Context helps us ...

- Connect in a meaningful capacity
- Identify what matters
- Understand values
- Creating better experiences
When?
Audience profiling expands beyond the site

Audience research

- Branding
- Media strategy

Sales

- Product development, go-to-market strategy
- Introduction
- Growth
- Maturity
- Decline

Time
User data affects deliverables across digital BU's

- Competitor identification
- Intent mapping
- Keyword mapping
- UX strategy
- UI flow mapping
- Info labelling
- Taxonomy
- Internal linking
- Test planning
- Data labelling
- Site search
- Content development
- Wireframing
- Designing UX

Deliverables affected by user knowledge throughout creating an experience

- Determining priority
- Content strategy
- Analysis
- UI flow mapping
- Info labelling
- Internal linking
- Test planning
- Data labelling
- Site search
- Content development
- Wireframing
- Designing UX

Milestones

- Content
- IA
- UX
- Design
- Analytics
- Other

Phase

- Importance
  - More
  - Less

Inspired by: https://public-media.interaction-design.org/images/ux-daily/5682aeb69b4d6.jpg
Where?
Where?

1. First-party
2. Third-party
## First-party

<table>
<thead>
<tr>
<th>Tool Type</th>
<th>Example Tools</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Performance Analytics</td>
<td>Google Analytics, Adobe Analytics</td>
<td>FREE-$$$</td>
</tr>
<tr>
<td>Organic Search Performance</td>
<td>Google Search Console, Bing Webmaster Tools</td>
<td>FREE</td>
</tr>
<tr>
<td>Ranking Tools</td>
<td>STAT, AWR, Conductor, BrightEdge</td>
<td>$-$$$</td>
</tr>
<tr>
<td>Surveying Tools</td>
<td>Google Surveys, Survey Monkey</td>
<td>FREE-$</td>
</tr>
<tr>
<td>CRM</td>
<td>(CRM Team)</td>
<td>$$$</td>
</tr>
</tbody>
</table>
GA > Audience > Interest

**In-Market**
(conscious, temporary behavior)

1. Employment
2. Software/Business & Productivity Software
3. Employment/Career Consulting Services
4. Business Services/Staffing & Recruitment Services
5. Business Services/Business Technology/Web Services/Web Design & Development
6. Travel/Hotels & Accommodations
7. Business Services/Business Technology/Enterprise Software
8. Financial Services/Investment Services
9. Business Services/Advertising & Marketing Services
10. Travel/Air Travel

**Affinity**
(general interests, hobbies, behavior)

1. Shoppers/Value Shoppers
2. Media & Entertainment/Movie Lovers
3. Technology/Technology
4. Lifestyles & Hobbies/Green Living Enthusiasts
5. Travel/Business Travelers
6. Media & Entertainment/Music Lovers
7. Lifestyles & Hobbies/Business Professionals
8. Beauty & Wellness/Frequently Visits Salons
9. Sports & Fitness/Health & Fitness Buffs
10. Travel/Travel Buffs

**Other**
(everything that didn’t fit)

1. Arts & Entertainment/Celebrities & Entertainment News
2. Reference/General Reference/Dictionaries & Encyclopedias
3. Arts & Entertainment/TV & Video/Online Video
4. [Life Events] Job Change/Recently Started New Job
5. [Life Events] Moving/Recently Moved
6. News/Sports News
7. [Life Events] Job Change/Starting New Job Soon
8. Travel/Air Travel
9. News/Weather
10. Sports/Team Sports/Soccer
1. Filter by organic search medium.
2. Click on a specific [Client id].
3. Expand session information
4. View journey across site
GA – Ask Analytics Intelligence basic questions

Ask Analytics Intelligence

Quickly get answers to many questions about your business. Here are a sample of questions you can try asking. Click on any to see an immediate answer on the right panel.

- Basic Performance
- Where You Get Your Users From
- Understanding Trends
- Content Analysis
- Understanding User Behavior
- Geographic Analysis
- Measure Your Goals
- Technical Performance
GA – Ask Analytics Intelligence basic questions

Ask Analytics Intelligence

Quickly get answers to many questions about your business. Here are a sample of questions you can try asking. Click on any to see an immediate answer.

- Basic Performance
- Where You Get Your Users From
- Understanding Trends
- Content Analysis
- Understanding User Behavior
- Geographic Analysis
- Measure Your Goals
- Technical Performance

Understanding Trends
- Show me a trend of my bounce rate over the last 3 months
- Trend of monthly users over the last six months
- Trend of daily sessions over the last 30 days
- Trend of daily sessions over the last 30 days compared to last year
- What's the month-over-month growth rate of my users?
- Show me a trend of my week-over-week growth rate of users for the last 10 weeks
- Why did my users change last week?
- Any anomalies in number of users last week?

Content Analysis
- What are my top pages in terms of pageviews?
- What are my top landing pages in terms of sessions?
- What pages do people spend the most time on?
- What are my top landing pages by user?
- Entrances & Exits for my top pages
- Which landing pages with over 10 sessions have the worst bounce rates?

Understanding User Behavior
- How long do users spend on my site?
- Average session duration on mobile vs desktop
- New vs Returning users last month
- Session duration for new vs. returning users last month
- Distribution of count of sessions
- What browsers do my users use the most?
- What devices do my users use?
- What are my top event categories by user?
- What are my top event actions by user?
### GSC – What stories does click behavior tell?

<table>
<thead>
<tr>
<th>How to categorize?</th>
<th>What are top categories?</th>
</tr>
</thead>
<tbody>
<tr>
<td>via Google Sheets or Excel</td>
<td>via Jupyter Notebook or Colab</td>
</tr>
<tr>
<td>ML</td>
<td>manual... 😞</td>
</tr>
</tbody>
</table>
### Surveys (targeted + specific)

<table>
<thead>
<tr>
<th>assortment of tips</th>
<th>reference expert style</th>
<th>use quant ?s</th>
<th>keep it short</th>
<th>avoid leading ?s</th>
</tr>
</thead>
<tbody>
<tr>
<td>use clear, plain lingo</td>
<td>stay const.</td>
<td>avoid yes/no ?s</td>
<td>test the survey</td>
<td></td>
</tr>
</tbody>
</table>
### How to find Google Discover Interests:

1. Open a new tab on Chrome
2. Login to your Google Account
3. Open Google Developer Tools
   - Right click > Inspect
   - **Windows**: CTRL + Shift + I
   - **Mac**: Command + Option + I
4. Toggle device to mobile
   - Click on ✉️ icon
5. Select Galaxy S5 from dropdown
6. Navigate to www.google.com
7. Select the vertical ellipsis under any card
8. Select: Manage Interests > Your Interests
9. Copy Interests
   - **Windows**: CTRL + A to select all
   - **Mac**: Command + A to select all
   - **Windows**: CTRL + V
   - **Mac**: Command + V
10. Paste Interests into Google Form

Source: @abbnhamilton
## Third-party

<table>
<thead>
<tr>
<th>Tool Type</th>
<th>Example Tools</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keyword Search Data</td>
<td>Google’s Keyword Planner, KeywordTool.io, Answer the Public, Google Trends, Think with Google Shopping Insights</td>
<td>FREE-$</td>
</tr>
<tr>
<td>Social Data</td>
<td>Google Trend + YT filter, KeywordTool.io/YouTube, Reddit</td>
<td>FREE-$</td>
</tr>
<tr>
<td>Audience Tools</td>
<td>Google Find My Audience, Facebook Audience Insights, Adobe Audience Manager</td>
<td>FREE-$$$</td>
</tr>
<tr>
<td>Publicly Available Datasets</td>
<td>US Census, Kaggle</td>
<td>FREE</td>
</tr>
<tr>
<td>Competitive</td>
<td>comScore, Hitwise</td>
<td>$</td>
</tr>
<tr>
<td>Social Listening</td>
<td>Buzzsumo, Sparktoro</td>
<td>$-$-$ (some trial versions)</td>
</tr>
<tr>
<td>Research Publications</td>
<td>Pew Research Center, Market Research, Demographic Research, Mary Meeker’s Internet Trends Report</td>
<td>FREE-$$$</td>
</tr>
<tr>
<td>CRM</td>
<td>Endless...</td>
<td>$$$</td>
</tr>
</tbody>
</table>
Search data

- Categorize
  - By intent
  - By SERP feature (SERP intent)
  - By brand
  - By questions

- Use location data to map out markets
Audience tools – Google Find My Audience

**Business & Productivity Software**
People interested in purchasing software with business applications like word processing, spreadsheets, presentations, or dictation. They often come to YouTube for reviews about different kinds of software before making their purchases.

**Video Games**
People interested in purchasing video games. They often come to YouTube for gaming live streams, gameplay videos, and game reviews.

**Air Travel**
People interested in booking flights. They often come to YouTube to browse travel guides and see what each airline has to offer.

---

**Top YouTube channels people shopping for Business & Productivity Software are likely to be watching**

- @merkleinc
- @moz

**People shopping for Business & Productivity Software are also researching or planning to purchase these products and services**

- Business Technology
- Tax & Accounting Software
- Career Consulting services
- Design Software

**People shopping for Business & Productivity Software are also likely to be part of these audiences**

- Value Shoppers
- Bargain Hunters
- Fast Food Cravers
- Foodies

---

**Top YouTube channels people shopping for Video Games are likely to be watching**

- @gaming
- @eSports

**People shopping for Video Games are also researching or planning to purchase these products and services**

- Game Consoles
- Mobile Phones
- Computer Accessories & Components
- DVDs & Videos

**People shopping for Video Games are also likely to be part of these audiences**

- Value Shoppers
- Light TV Viewers
- Fast Food Cravers
- Bargain Hunters

---

**Top YouTube channels people researching Air Travel are likely to be watching**

- @travel
- @expedia

**People researching Air Travel are also researching or planning to purchase these products and services**

- Trips by Destination
- Car Rental
- Hotels & Accommodations
- Bus & Rail Travel

**People researching Air Travel are also likely to be part of these audiences**

- Foodies
- Bargain Hunters
- Value Shoppers
- Fast Food Cravers
Audience tools – FB Audience Insights

Filter audience data

Choose category
## Audience tools – FB Audience Insights

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Selected Audience</th>
<th>Compare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and Restaurants</td>
<td>12%</td>
<td>+36%</td>
</tr>
<tr>
<td>Sales</td>
<td>28%</td>
<td>+23%</td>
</tr>
<tr>
<td>Administrative Services</td>
<td>29%</td>
<td>+18%</td>
</tr>
<tr>
<td>Healthcare and Medical Services</td>
<td>17%</td>
<td>+12%</td>
</tr>
<tr>
<td>Legal Services</td>
<td>2%</td>
<td>+6%</td>
</tr>
<tr>
<td>Production</td>
<td>19%</td>
<td>+6%</td>
</tr>
<tr>
<td>Farming, Fishing and Forestry</td>
<td>6%</td>
<td>+6%</td>
</tr>
<tr>
<td>Education and Libraries</td>
<td>13%</td>
<td>+3%</td>
</tr>
<tr>
<td>Protective Services</td>
<td>5%</td>
<td>+2%</td>
</tr>
<tr>
<td>Transportation and Moving</td>
<td>11%</td>
<td>+2%</td>
</tr>
</tbody>
</table>

Job titles
## Top picks / category

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Caffe</td>
<td>Panera Bread</td>
</tr>
<tr>
<td>2</td>
<td>Ice Cream Shop</td>
<td>Baskin-Robbins</td>
</tr>
<tr>
<td>3</td>
<td>Sandwich Shop</td>
<td>Jimmy John's</td>
</tr>
<tr>
<td>4</td>
<td>Diner</td>
<td>Steak 'n Shake</td>
</tr>
<tr>
<td>5</td>
<td>Pizza Place</td>
<td>Pizza Hut</td>
</tr>
<tr>
<td>6</td>
<td>American Restaurant</td>
<td>IHOP • Dunkin'</td>
</tr>
<tr>
<td>7</td>
<td>Italian Restaurant</td>
<td>Olive Garden</td>
</tr>
<tr>
<td>8</td>
<td>Household Supplies</td>
<td>Duck Tape</td>
</tr>
<tr>
<td>9</td>
<td>Insurance Company</td>
<td>Flo from Progressive</td>
</tr>
<tr>
<td>10</td>
<td>Fast Food Restaurant</td>
<td>Sonic: Drive-In • Dairy Queen • Taco Bell • Wendy's • Chick-fil-A</td>
</tr>
<tr>
<td>11</td>
<td>Food &amp; Beverage Company</td>
<td>Chipotle Mexican Grill • Pop-Tarts • ORIO • Betty Crocker • Gatorade • Starbucks</td>
</tr>
<tr>
<td>12</td>
<td>Kitchen/Cooking</td>
<td>Pillsbury</td>
</tr>
<tr>
<td>13</td>
<td>Restaurant</td>
<td>Applebee's Grill &amp; Bar • The Cheesecake Factory</td>
</tr>
<tr>
<td>14</td>
<td>Movie Theater</td>
<td>Regal • AMC Theatres</td>
</tr>
<tr>
<td>15</td>
<td>Chicken Joint</td>
<td>Buffalo Wild Wings</td>
</tr>
<tr>
<td>16</td>
<td>Food &amp; Beverage</td>
<td>Coca-Cola</td>
</tr>
<tr>
<td>17</td>
<td>Seafood Restaurant</td>
<td>Red Lobster</td>
</tr>
<tr>
<td>18</td>
<td>Rental Shop</td>
<td>Redbox</td>
</tr>
</tbody>
</table>
Audience tools – FB Audience Insights

Location

<table>
<thead>
<tr>
<th>Cities</th>
<th>Selected Audience</th>
<th>Compare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detroit, Michigan, United States</td>
<td>0.2%</td>
<td>+100%</td>
</tr>
<tr>
<td>Pittsburgh, Pennsylvania, United States</td>
<td>0.2%</td>
<td>+100%</td>
</tr>
<tr>
<td>Duval County, Florida, United States</td>
<td>0.2%</td>
<td>+100%</td>
</tr>
<tr>
<td>Allegheny County, Pennsylvania, United States</td>
<td>0.2%</td>
<td>+100%</td>
</tr>
<tr>
<td>Cuyahoga County, Ohio, United States</td>
<td>0.2%</td>
<td>+100%</td>
</tr>
<tr>
<td>Baltimore, Maryland, United States</td>
<td>0.3%</td>
<td>+50%</td>
</tr>
<tr>
<td>Wayne County, Michigan, United States</td>
<td>0.3%</td>
<td>+50%</td>
</tr>
<tr>
<td>Atlanta, Georgia, United States</td>
<td>0.4%</td>
<td>+33%</td>
</tr>
<tr>
<td>Cook County, Illinois, United States</td>
<td>0.7%</td>
<td>+17%</td>
</tr>
<tr>
<td>Los Angeles County, California, United States</td>
<td>1%</td>
<td>+10%</td>
</tr>
<tr>
<td>New York, New York, United States</td>
<td>2%</td>
<td>+7%</td>
</tr>
<tr>
<td>Tucson, Arizona, United States</td>
<td>0.1%</td>
<td>+0%</td>
</tr>
</tbody>
</table>
Audience tools – FB Audience Insights

Activity + device usage
Audience tools – Sparktoro

Ability to break down data in a variety of ways
Audience tools – Sparktoro

Straight-forward overview + top social accounts
Great online consumption data, relating to cited interests
Audience tools – Sparktoro

Top active networks to prioritize area of focus

Most Active Networks

- Facebook: 42.3%
- LinkedIn: 28.7%
- Instagram: 27.1%
- YouTube: 24.5%
- Github: 14.2%
- Medium: 4.8%
- Pinterest: 3.9%
- Apple: 3%
- Vimeo: 1.2%
- Reddit: 0.8%
- Dribbble: 0.3%
- Twitter: 100%

*Other social networks are shown as a % of Twitter (as Sparktoro uses this network for the baseline)
Audience tools – Sparktoro

Useful social listening bits

Frequently used words/phrases in shares and content:
- paper: 35%
- student: 29%
- computer: 27%
- access: 26%
- machine: 25%
- scientists: 25%
- workshop: 25%
- including: 24%
- impact: 24%
- model: 23%

Frequently used hashtags in shares and content:
- #machinelearning: 13%
- #datascience: 11%
- #python: 7.8%
- #deeplearning: 7.2%
- #coding: 6.8%
- #osforall: 6.7%
- #hourofcode: 6.1%
- #womeninSTEM: 6.0%
- #programming: 5.3%
- #cybersecurity: 4.8%
Research publications – endless stream of research that can help you understand your audience

Number of American workers who freelance

57M
+4 million since 2014

Exhibit 1-2: The Great Unraveling in Housing

Location of Last Stress Meltdown (January 2018)

How much do people make in the sharing economy?

<table>
<thead>
<tr>
<th>RANK</th>
<th>COMPANY</th>
<th>AVERAGE/MO</th>
<th>MEDIAN/MO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Airbnb</td>
<td>$924</td>
<td>$440</td>
</tr>
<tr>
<td>2</td>
<td>TaskRabbit</td>
<td>$390</td>
<td>$150</td>
</tr>
<tr>
<td>3</td>
<td>Lyft</td>
<td>$377</td>
<td>$190</td>
</tr>
<tr>
<td>4</td>
<td>Uber</td>
<td>$364</td>
<td>$156</td>
</tr>
<tr>
<td>5</td>
<td>Doordash</td>
<td>$229</td>
<td>$100</td>
</tr>
<tr>
<td>6</td>
<td>Postmates</td>
<td>$174</td>
<td>$70</td>
</tr>
<tr>
<td>7</td>
<td>Etsy</td>
<td>$161</td>
<td>$40</td>
</tr>
<tr>
<td>8</td>
<td>Rover</td>
<td>$103</td>
<td>$60</td>
</tr>
<tr>
<td>9</td>
<td>Getaround</td>
<td>$88</td>
<td>$70</td>
</tr>
<tr>
<td>OVERALL</td>
<td>$299</td>
<td>$109</td>
<td></td>
</tr>
</tbody>
</table>

Data is based on tens of thousands of current users and applicants.
<table>
<thead>
<tr>
<th>Content</th>
<th>Frequency (%) of respondents who meet criterion; aka, Horizontal</th>
<th>Index (comparison to base audience)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High ↗</td>
<td>High ↗</td>
</tr>
<tr>
<td>Targeted Campaigns</td>
<td>Low - High</td>
<td>High ↗</td>
</tr>
</tbody>
</table>
Hierarchy of data

1. **PERSON**
   - (matching anonymous people-based ID)
   - Segment level analysis
   - Sampled customer data
   - Panel (targeting based on logic)
   - Survey
   - Audiences
   - Persona

2. **COOKIE**
   - (targeting digital proxy)

3. **PANEL**
   - (targeting digital proxy)
Closed loop – Taking data we know ...

Platform 1

Platform 2

Platform 3

Platform 4

We know this is the same guy
Closed loop - ... and adding more

We can close the loop
Match rate

(18 unknown
+ 2 bots
+ 5 people (we know their ids)
)

% 25 total inputs

= 20% match rate
Data... can be funny (example: 35-49 year olds crush Minute Maid)
What is in that juice?!
But they also index higher (than base) for having children.

- Presence of Children: 98%
- Presence of Children Aged 8 - 12: 82%
- Presence of Children Aged 4 - 7: 71%
- Presence of Children Aged 0 - 3: 54%
- Presence of Children Aged 13 - 18: 38%
And lead to random introspective questions... like why do 76+ year old index so low on Chipotle?
Why don’t people get Chipotle as much with grandparents in the house?
How?
How to get started organizing

**brainwriting**  
(ideate before talking)

**mini-charrettes**  
(highly recommend online board)
How to present

1. Illustrate a common user journey

2. Audience brief

3. Customer journey
Illustrative user journey for content

**Stages**

**Website Touchpoints**

**Primary Focal Points**
Means-ends model

- Product attributes
- Benefits
- Feeling
- The self
What are the [attributes] of the product, that lead to [functional benefits], which affect [how users feel] that reflects on their [personal values].
Audience profile briefs

INTERNET ONLY
YOUNG, ORIGINAL, TECH SAVVY, CONNECTED.

This customer wants to experience all life has to offer. They crave adventure with a constant connection to the online world, including the social, information, and shopping benefits. They are tech super users, having grown in a technophile generation.

NEVER BORED
To win this group we must be the brand that appeals to the omnipresence of internet service. This audience wants constant access to the Internet, strong functionality, and a reasonable price. Content strategy should focus on ubiquity of WiFi hotspots, reliable connection, and entertainment value.

Social Networking
Always connected
Self-expensive
High value
Personal Consequences
Functional Consequences
Individuality
Experience
Personal Values

NEW BORED
This customer wants to experience life, adventure, travel, eat foreign foods, live healthy, and find their own answers. Content strategy should focus on action movies, constant connection, and experience.

NEVER BORED
60% Find deals online (index of 120)
59% Rely on Internet for communication (family/friends) (index of 136)
63% Agree Internet has changed way they use leisure time (index of 120)

INTERNET ONLY
KEY DEMOGRAPHICS
% OF SEGMENT AS COMPARED TO TOTAL

OVERALL: THIS SEGMENT HAS A HIGH NEED FOR ON-THE-GO TECH

OTT BRANDS

Merkle | Moz
@alexisksanders
### Mapping the user journey against content

#### User Stages Through Funnel

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Acceptance</th>
<th>Consideration</th>
<th>Decision</th>
<th>Billing</th>
<th>Claims</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>the spark</td>
<td>do I really need it?</td>
<td>researching</td>
<td>buying now</td>
<td>pay like any other utility</td>
</tr>
<tr>
<td><strong>Goals</strong></td>
<td>“I think I may need life insurance”</td>
<td>“yep, I probably should buy life insurance”</td>
<td>“what life insurance should I buy?”</td>
<td>“I’m buying Protective”</td>
<td>“Aw! I need to pay my bill!”</td>
</tr>
<tr>
<td><strong>Types of Content</strong></td>
<td>What is...?</td>
<td>Should I get...? (e.g., term or whole)</td>
<td>What’s the best time?</td>
<td>Product pages</td>
<td>Product page</td>
</tr>
<tr>
<td><strong>Common Traits</strong></td>
<td>Likely have some life change (e.g., newborn, loss of a loved one, change in career)</td>
<td>Don’t know exactly what they need, but know they need something (advice)</td>
<td>What’s affordable?</td>
<td>Ready to commit to a potentially lifelong relationship with Protective</td>
<td>Trying to make sure their policy doesn’t lapse</td>
</tr>
<tr>
<td><strong>Content Location</strong></td>
<td>Learning center</td>
<td>Learning center</td>
<td>Product pages</td>
<td>Product pages</td>
<td>Product pages</td>
</tr>
<tr>
<td><strong>Next Stage</strong></td>
<td>Advice on what to do</td>
<td>Establishing credibility</td>
<td>Ensuring that they’re aware of support and interaction options (to clarify any questions, support with purchasing)</td>
<td><strong>Billing</strong></td>
<td><strong>Claims</strong></td>
</tr>
</tbody>
</table>

#### Beneficiary securing funds

- Claims center
- Grief processing
- Finding life insurance policies
- Online status of death benefit

---

**Mapping the user journey against content:**

- **Awareness**
  - **Name:** the spark
  - **Goals:** “I think I may need life insurance”
  - **Types of Content:** What is...? Should I get...? (e.g., term or whole)
  - **Common Traits:** Likely have some life change (e.g., newborn, loss of a loved one, change in career)
  - **Content Location:** Learning center
  - **Next Stage:** Advice on what to do

- **Acceptance**
  - **Name:** do I really need it?
  - **Goals:** “yep, I probably should buy life insurance”
  - **Types of Content:** Don’t know exactly what they need, but know they need something (advice)
  - **Common Traits:** Don’t know exactly what they need, but know they need something (advice)
  - **Content Location:** Learning center
  - **Next Stage:** Establishing credibility

- **Consideration**
  - **Name:** researching
  - **Goals:** “what life insurance should I buy?”
  - **Types of Content:** What’s the best time? What’s affordable?
  - **Common Traits:** What’s affordable? What’s affordable?
  - **Content Location:** Product pages
  - **Next Stage:** Ensuring that they’re aware of support and interaction options (to clarify any questions, support with purchasing)

- **Decision**
  - **Name:** buying now
  - **Goals:** “I’m buying Protective”
  - **Types of Content:** Ready to commit to a potentially lifelong relationship with Protective
  - **Common Traits:** Ready to commit to a potentially lifelong relationship with Protective
  - **Content Location:** Product pages
  - **Next Stage:** Bill pay

- **Billing**
  - **Name:** pay like any other utility
  - **Goals:** “Ah! I need to pay my bill!”
  - **Types of Content:** Bill pay experience*
  - **Common Traits:** Bill pay experience*
  - **Content Location:** Bill pay experience*
  - **Next Stage:** If they have a positive experience, encourage loyalty loop

- **Claims**
  - **Name:** Beneficiary securing funds
  - **Goals:** “how am I going to make it through?”
  - **Types of Content:** Claims center
  - **Common Traits:** Claims center
  - **Content Location:** Claims center

---

* Bill pay* (auto-pay)
Journey mapping can expand to all channels
tl;dr

• Use what data you have available

• Communicate with other team’s to get a fuller picture and to compare notes

• User research is always evolving

• Personalization, 1:1 user to campaign are a thing
Closing: iterative, constant change = new norm

Guessing Right

Learning Fast

Source: https://kube.academy/
Special thanks to Abby Hamilton, Chris Glarner, Max Prin, Katelyn Anderson, and Adam Audette!
It’s been an honor to spend time with you MozCon!
Appendix
Key questions to answer:

- **Key information:**
  - What are key demographics that affect decisions? (age, gender, income, location, # of children)
  - What are the top 5 adjectives describing the audience?

- **Personal core:**
  - What do they want in life?
  - What are some of their motivators in life?
  - What do they value and see as a self-concept?
  - What attitudes do they have? (e.g., [I like to learn about things, even if they do not see relevant at the time])
  - What are cited interests?

- **Product:**
  - How do you win over this group?
  - What do they want?
  - What do they look for in terms of the products?
  - Top competition (e.g., [I am most likely to buy product/service from: ...])

- **Relationship w/tech:**
  - What is their relationship with technology?
  - What is their relationship with the website?
  - What is their annual spend on the product/service?
  - Where are they engaging online?
  - How do users engage with different forms of digital media?
Thank you

ALEXIS SANDERS
Senior SEO Manager, Merkle

@AlexisKSanders