



Privacy Preference Service Proof of Concept - User Guide



The Privacy Preference Service
helps you manage your privacy.

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Proof of Concept - User Guide

The Privacy Preference Service is a 'Proof of Concept'/ Demonstration system and not a live operational system. It is important that users have a clear understanding of what can be expected of the system.

The system has four main components, all of which generate functionality that is over and above most current e-commerce applications.

Over time we believe this combination will be required to render direct marketing viable on an ongoing basis across ALL communications channels.

That is to say we believe direct marketing must be built on the principles of INFORMED OPT-IN and not on the current approach where permission to contact is either not sought at all, or sought in such a way.

The four components, and an outline of the current PPS deployment of them are:

1) Privacy Profile and Suppression File.

The only way we can see to 'do a hard re-set' on the current mess is to create a new environment in which 'opt out' is the start point. That may happen from the legal perspective a few years down the track, but there will be work-arounds that will remain; so opt-out as the norm has to be brought to bear via commercial forces, backed by technology.

The Privacy Profile and Suppression file shows how such a platform could be built. In essence, builds the type of file the direct marketing industry is very used to- but includes 'do not contact me on this number/ this address across ALL direct communication channels. (at present we have used direct mail, e-mail, land line phone call, mobile phone call, SMS, VOIP call and door to door delivery/ un-addressed mail - but this list can easily be extended as more and more direct contact channels emerge/ grow the ability to be used for direct marketing)

The up front wizard process in PPS populates an initial/ default profile, including the contact details which are then used to populate the blanket opt-out suppression file which is a key driver of improved data privacy. Note that each channel option should be populated, or if you do not have access to that channel marked not applicable.

This suppression file/ use instructions would be available, at a small charge, to legitimate direct marketers with profits re-invested in the PPS service. Whilst initially direct marketers would resist such a file - enough of them realise that the writing is on the wall for 'opt out' based direct marketing to lead to a break in the ranks - which in turn places PPS compliant marketers at a competitive advantage.

2) Privacy Persona / Roles

This feature addresses an anomaly that could cause the 'opt-in' approach to fail - namely that individuals in fact act in multiple roles in their lives, some of which mean that they not opt out, because they actively do want random communications in that role.

The direct marketing world (and indeed most of commerce) is not geared up to operate at this level of targeting sophistication - and will not be for some time; this is because the 'role level' data is typically managed by the individual and not actively shared for direct marketing purposes. At present, direct marketing and commerce tend to treat an individual acting in three roles (e.g. head of household, company director, member of the golf club) as three separate people.

The PPS capability to establish multiple roles (persona) per individual, each with separate communications preferences. In practice, until the system goes operational in practice, PPS users should work initially with only one profile.

3) Exceptions

The difference between junk direct marketing and qualified sales leads is Relevancy; i.e. communicate with the potential customer with the right product offer at the time they are in the market for such a product/ service and they will welcome the approach. Use slightly informed guesswork to make such a product offer and turn up when the individual has no interest or no requirement for such a thing then the marketer has wasted their time and money, the time of the individual and consumed valuable resources unnecessarily.

The 'exception' function within PPS builds on top of the now deployed 'opt out'; i.e. if PPS was deployed in anger then at this stage the individual would be receiving no direct marketing through the channels they had added to the privacy profile/ suppression file. However, there will be times when the individual would actually welcome offers, i.e. as and when they knew they intended to buy something. Intention to buy data is what makes organisations pay attention; of all the types of data that private sector organisations like to gather - this is the crown jewels.

This intention data is gathered by PPS that enables the individual to say:

- 1) I intend to buy one of these (products or services, currently selected from a drop down list) (search, subscribe etc all become future options)
- 2) I would like to receive offers either from any organisation, or from specific named organisations X, Y or Z...
- 3) I would like to receive these offers through communication channels A, B or C...
- 4) I would like to receive the offers in the time windows, D, E or F
- 5) I will let you know when I want the offers to stop by deleting the intention record

3) Exceptions (Cont'd)

This detailed intention record is then made available to be matched (within the PPS environment) with a file of 'offers' that organisations wish to make available. This file is either sourced direct from organisations themselves, or via intermediaries such as affiliate networks (although this route renders the suppression file deployment difficult in a live deployment). At present PPS has mocked up a client feed - to see the system working select the following exception tree:

Interest = Audio

Then

- = Portable Audio
- = MP3 players
- = iPod Nano 4Gb

Exceptions can be made at any level of the tree, obviously the more granular the selection the more targeted the offer will be.

When the product or product area has been selected, use 'create new' to then choose firstly which organisations should be included in the matching exercise, and secondly which contact media you would prefer (*), and then lastly the time window in which you would wish to receive offers.

Note that during this proof of concept only e-mail is deployed. The others can be deployed easily, although obviously some media (mail) are less able to handle the sensitivities of time windows than others.

In the case of e-mail, the PPS matching engine ensures delivery at the time requested, irrespective of when suppliers provide the match offer (although note that at present e-mails are only sent once per day, automatically at 9.00am UK time).

4) Interactions

The fourth component of the PPS system is the communication that reaches the individual based on the selections made above (product/service, supplier, media, timing).

At present, only e-mail is live as an option. The individual will receive one e-mail per day (at 9am UK time) for each exception they have logged. This e-mail will include a hyperlink to the offer being made by each organisation. All matching offers are rolled up into the one daily e-mail.

Business rules are in place that can exclude offers that have already been sent, (unless the price drops for example); at present the PPS engine will continue to re-send existing offers in order to aid understanding of the system and its functionality.

When a link in the offer e-mail is clicked, this is tracked by the PPS system - in order to report back on activity levels to both individuals and inputting organisations. This tracking also enables the tagging of 'the lead' as having originate through PPS. Ultimately we see individuals sharing in the commission process (be offered reduced prices) as they have made significant effort to make supplier marketing more accurate and thus cost effective.

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