

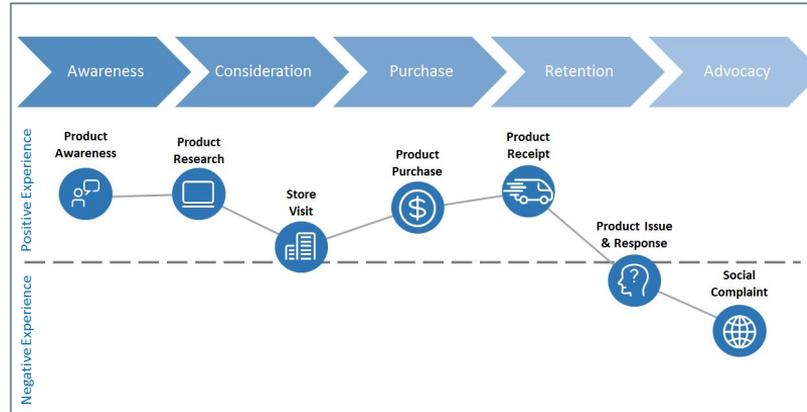
# Business *is* Personal

New England Drupal Camp

***oomph***

# What are we talking about

We design and build digital experiences that connect with our client's audience



**oomph**

*We should be applying those same abilities and techniques with our client relationships*

*You can't personalize without getting personal*

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When the trust account is high,  
communication is easy, instant, and effective.

– *Stephen R. Covey*

# Why bother?

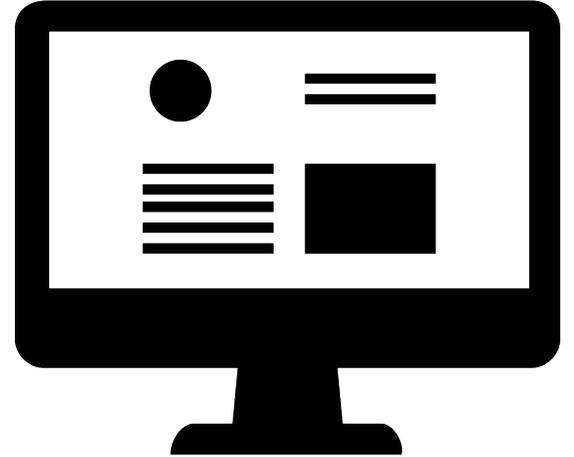
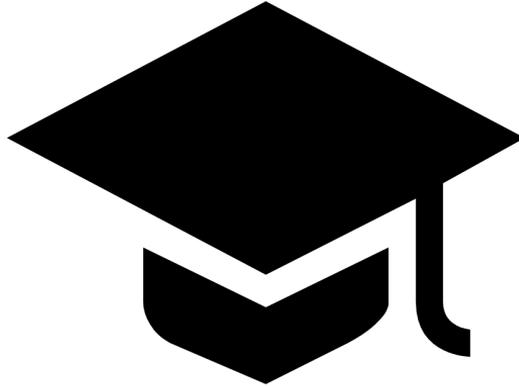
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- Easier to have difficult discussions
- New engagements
- Positive referrals
- They will move and take you with them
- **LIFETIME CLIENT**

*Because business is personal*

# How did I get here

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It's about the *service* you're providing and the  
*trust* you're building

# How do we do that



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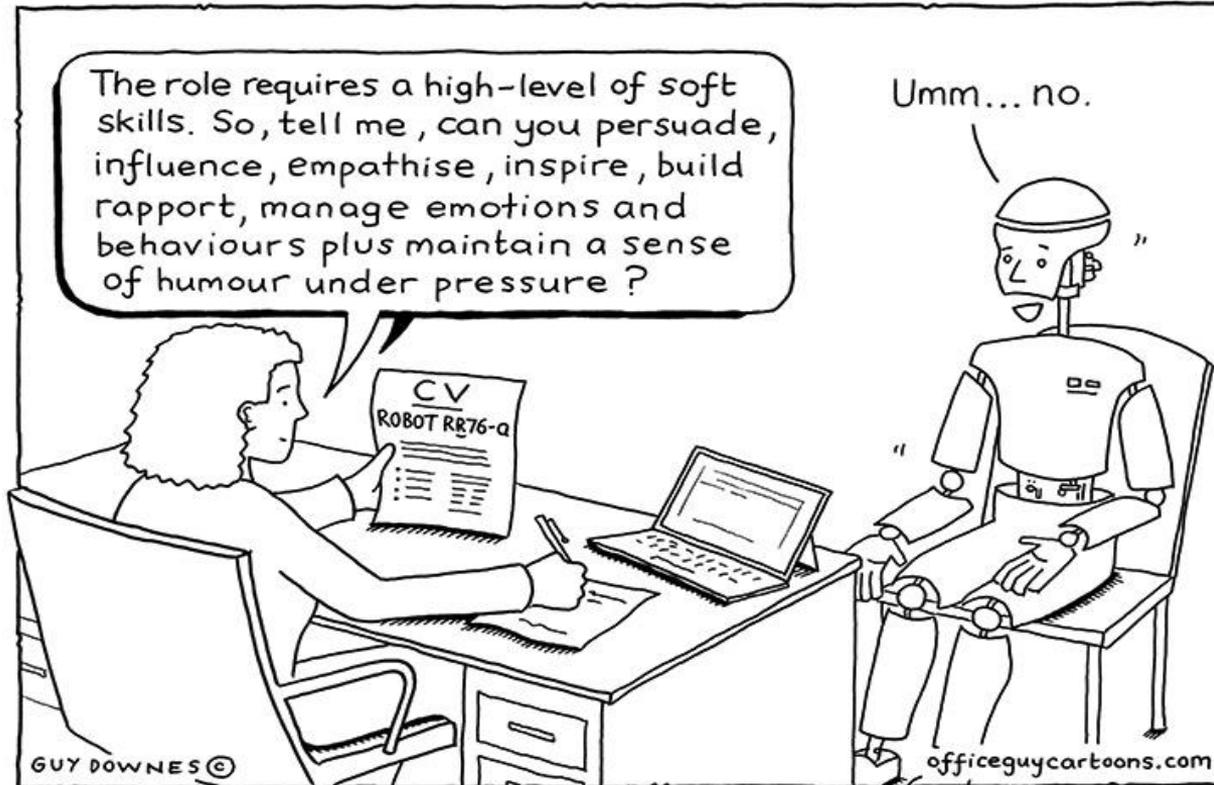
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"It just comes naturally. I have good people skills."

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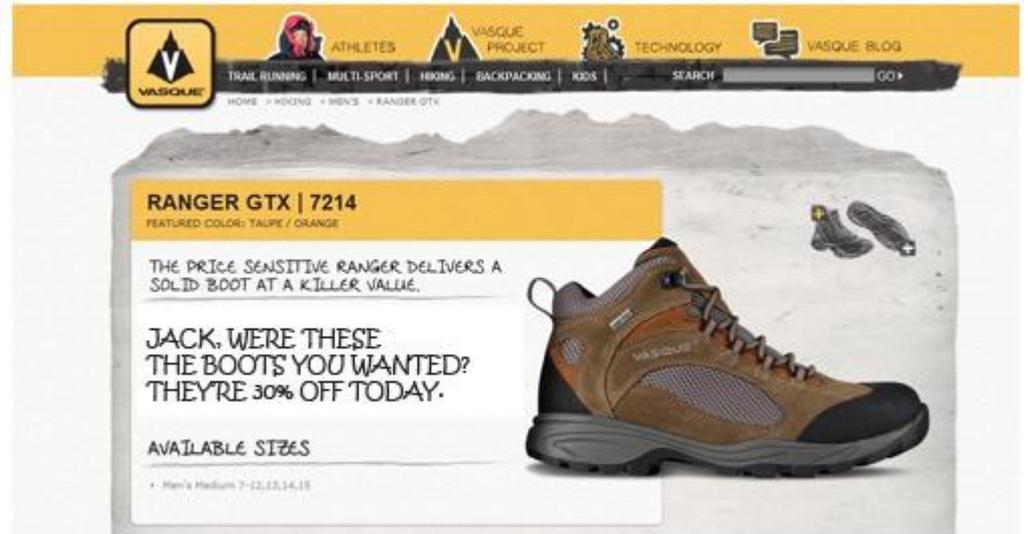
# How do we do that



# Web Personalization

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The process of delivering tailored experiences to visitors based on their unique preferences, as opposed to providing a uniformed experience for all visitors on the site.



# Data Collection

# It still starts with Discovery

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- Identifying the audience & develop personas
- Do the same with your clients and stakeholders
  - **Learn what they value, where they're coming from**
  - **Demographics**
  - **What team, what level is their role**
    - **Marketing team**
    - **IT team**
    - **C-Suite**

# Start general; get specific

Research is not creepy;  
it's good practice

1. What do they bring to this project/phase
2. Where did they come from
3. Where are they in their career
4. How do they communicate (language, communication style)



**MAGGIE, 52**

## DEMOGRAPHICS

-  Owns a 4 bedroom home in coastal NC and 2 high end cars. Lives in a suburban gated neighborhood.
-  Human Resource Director of a small media company for 5 years with a \$88,000 salary.
-  Happily married for 12 years with 2 sons and a household income of above \$220,000.
-  Well educated with an HR degree from a state university. Graduated without debt.

## BEHAVIORAL IDENTIFIERS

-  Hobbies include reading, playing tennis, networking at the country club, being involved in youth groups and visiting the beach.
-  Strong need for customer service and support. Values face to face communication and rewards systems.
-  Wants a simple product. Values quantity and brand image. Prefers print marketing and bold graphics.
-  Shops in department stores after 5pm. Buys in bulk on sale items. Referred by a previous client.
-  Owns an iPhone but makes purchases online with a desktop Mac computer. Needs a simple check out system.
-  Well traveled in Europe. Prefers traveling in off-peak times in chain hotels and loves pre-planned travel like cruises.
-  Personal goals to retire by age 65, to own a vacation home on the Spanish Riviera and for her sons to attend an ivy league university.
-  In very good health but very busy and often stressed. Visits group exercise programs.

# Profile of a profile

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- What do they want to gain from this project/engagement?
  - **Do they want to own something (an achievement) for their department?**
  - **Do they want to alleviate stress from their team?**
  - **Do they want to appease a disgruntled board?**
  - **Do they have secret passion/hobby with Drupal or design and their excited to use this an outlet outside of 9-5 job?**
- What does success mean to them?

# The Client Journey

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NO  
PAIN



HURTS  
A LITTLE



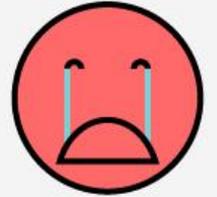
HURTS A  
LITTLE MORE



HURTS  
EVEN MORE



HURTS A  
WHOLE LOT

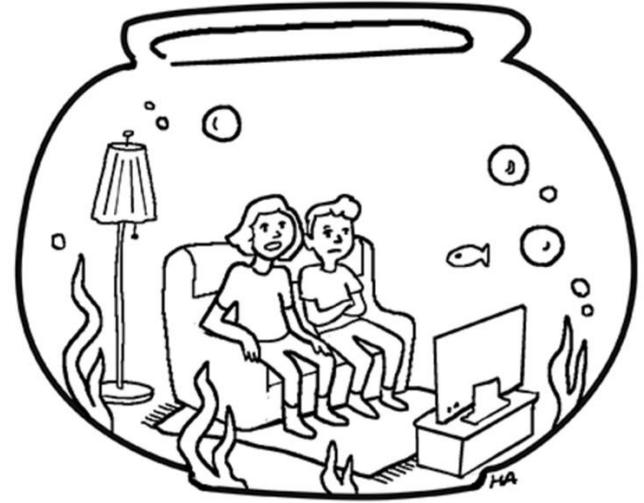


HURTS  
WORST

# No creep!

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- Remember, you're taking in more information than you use, but it adds to your understanding of your contact
- The output (additions to communication) does not & should not match the input that you gather



**"WELL ON THE UPSIDE, WE GET  
A HIGHLY PERSONALIZED EXPERIENCE."**

# Putting it in to practice

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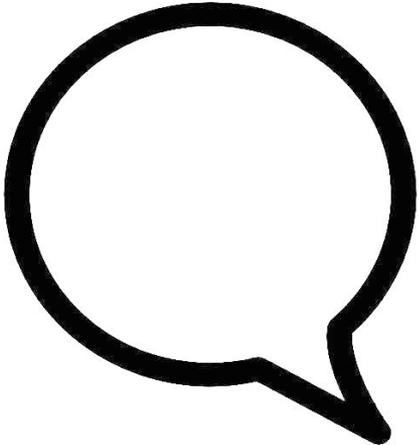
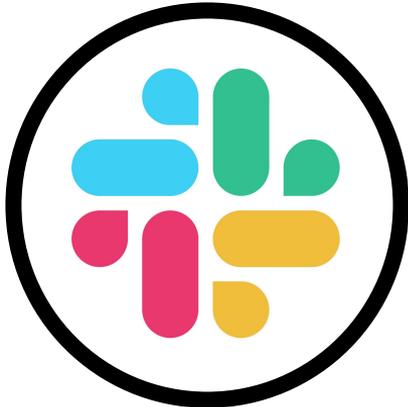
Part of communicating with your customers better is catering your messaging technique to how that person prefers to be reached.

- *Catherine Glifford*

Language is powerful,  
but active listening is *critical*

# Communication – Method

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# Language – Mirroring

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*“You are **literally** speaking my language”*

- 2008 Study in Journal of Experimental Social Psychology
- Students were assigned to negotiate with other students.
- Those who mirrored others’ posture and speech **reached a settlement 67% of the time**, while those who didn’t reached a settlement **12.5% of the time**.
- This kind of alignment fosters closeness and trust

# Mirroring - Here's How

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- It has to be genuine
- It requires engagement & effort
- Words, acronyms, tone/formality
- By adopting their norms, you build a shorthand, familiarity, and trust

Nuances are small instances of  
the *familiar* in your language

# Empathy

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- Be mindful of key dates/milestones
- Awareness/recognition of other external factors
- Small acts of kindness/generosity can have outside ripples

# Mindfulness

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The web is *our* every day



For the clients, it's tiny slice of theirs on top of their everyday jobs



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# It's not me; it's you

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- It's not about becoming BFFs
- It's about establishing trust with them
- Their knowing you is secondary  
(and not necessary)



# Outcome

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- Follow your process,  
**the project** will be successful
- Follow your process with your client,  
**the relationship** will be successful
- If done well, the relationship will feel intuitive  
and built on a foundation of trust

Outcome

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Credibility

Reliability

+ Intimacy

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**Trustworthiness**

*Make sure your relationships add up*

# Thank You

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