

# Leading the Personalisation Conversation

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# Leading the conversation on personalisation

Coming together to share ideas and challenges helps us grow, says Sophie Devonshire, CEO, The Marketing Society

"Walking the high wire between personalisation and privacy comes down to three core truths we've always known as brand guardians"

In our role at the Society 'leading the conversation', It's been fascinating to bring together five marketing leaders alongside an expert team from Meta to debate and share good ideas on all things personalisation. MR PORTER's Sabah Naqushbandi, Costa Coffee's Becky Brock, Homeserve's Roisin Donnelly, Direct Line Group's Mark Evans and Müller's Michael Inpong shared their wisdom, experiences and challenges in a candid discussion that we can share with you in the following pages.



We don't pretend to be experts on everything, but we do know about leadership. And we know that the moments when we come together and share our ideas and challenges, are the moments when we can learn and grow as an industry.

The good news is that these conversations suggest that walking the high wire between personalisation and privacy still comes down to four core truths we've always known as brand guardians. They are:

- Building brands, which in this area, especially, means building trust in our brands,
- Leading the way in transparency,
- Seeking innovation opportunities, and
- Putting consumers at the heart of everything we do.

Follow these guidelines and this will continue to ensure we're making the best strategic decisions in the personalisation space.

This report offers the opportunity for all of us to reflect on these conversations around personalisation. We hope you find them useful and we hope they help you shape your own thoughts and strategies around this important issue.

A handwritten signature in black ink that reads "Sophie". The signature is written in a cursive style and is underlined with a single horizontal stroke.

A WORD FROM OUR PARTNER

# The compatibility of personalisation and privacy

Creating meaningful connections with more data choice and control is key, says Russell Pert, Head of Industry, Financial Services, UK



**W**e're at an important inflection point in our industry with changes to cookies and iOS, coupled with the changing privacy regulatory landscape. We're delighted to take the opportunity to come together with The Marketing Society to speak with industry leaders on their perspectives around personalisation and privacy.

Personalisation and privacy are often presented as two concepts at odds with one another when it comes to digital advertising. But that isn't the case, the two are not incompatible—people can see content that is more relevant and meaningful to them, and businesses can reach the people who are more likely to take the actions they care about. Without compromising people's privacy.

It's essential to understand the full picture in order to clearly see the path forwards. Without any personalisation, the free and open internet, including the news people read, the ways they communicate and the entertainment they watch, would become less accessible to those who can't afford subscription services. What is critical however, is that people's privacy expectations have shifted and the industry must evolve in step. Marketers need to embrace new technology and use less data to achieve the 'you get me' feeling that both people and businesses value.

This is clearly complex and it's why we are so focused on investing in the evolution of our technology and solutions - creating meaningful connections between people and businesses through personalised ads, while giving people more data choice and control.

When we enable people to connect with businesses and products they love in a way that makes people feel confident and clear about how data is used, this provides tremendous value to people... which, in turn, drives strong performance for businesses.

# Meet the marketing leaders



**Roisin Donnelly**

Non Executive Director,  
Homeserve plc

Roisin Donnelly is the Non Executive Director of Homeserve. She is a former Non Executive Director of Bourne Leisure and Just Eat where she was Employee Engagement NED. She was Non Executive Director and Chair of Remuneration and Nominations Committees at Holland & Barrett. She is on the Digital Advisory Board for Coca-Cola Europacific Partners and on the board of IAB UK (Interactive Advertising Bureau) advising the digital industry.

Roisin was at Procter & Gamble for over 30 years in 15 different local and international roles with her last role as CMO for Northern Europe, leading six countries and 72 leading brands. Roisin is an experienced digital and e-commerce leader. She is experienced in M&A and in transforming organisations as an Executive and Non Executive leader. She is passionate about diversity and inclusion.



**Mark Evans**

Managing Director for  
Marketing & Digital,  
Direct Line Group

Mark Evans is an Executive level marketer and Non-Executive director with several side-hustles.

At Direct Line Group he is Managing Director for Marketing & Digital with responsibility for brand, communications, CRM, insight, digital and data across the brand portfolio. He is also Exec sponsor for the BAME element of DLG's D&I activity, and sits on the Board of DLG Legal Services.

Prior to Direct Line Group Mark worked at HSBC, 118118 and Mars in a range of marketing and commercial roles.

Mark also serves as Non-Executive Director of Learnetal, an Ed Tech business, Chairman of the School of Marketing, Chairman of the Advertising Association Front Foot, and co-host of the "Oh The Places We'll Go" web show. He also founded the Sprintathon in 2016 which seeks to #beatcancerfaster and has raised over £500k to date for Stand Up To Cancer.

Mark is a Fellow of the Marketing Society and of the Marketing Academy and has been recognised externally as the Financial Services Forum Marketer of the Year in 2015, The Marketing Society Leader of the Year in 2018, and within Campaign's Power 100 Hall of Fame.

## WHO'S WHO



### Becky Brock

Executive Commercial  
& Customer Director,  
Costa Coffee

In this role, Becky is accountable for customer strategy, proposition development, commercial buying and trading, plus the full marketing mix.

Becky began her career at Unilever, developing as a classically trained marketer across Regional and European roles before moving to premium spirits at The Edrington Group where she held a series of global marketing and commercial roles. She has subsequently become an experienced retail leader in very different types of businesses; rejuvenating the Homebase brand within a venture capital organisation, leading the sale and merger of two businesses at Outdoor and Cycle Concepts and most recently transforming the digital and data capabilities as Marketing Director of John Lewis.

She has built a reputation for galvanising team performance, bringing clarity of vision and commercial acumen to her roles. This has contributed to Management Today selecting her as one of 2015 '35 Women Under 35', being named The Marketing Society's 'Young Marketer of the Year' and winning awards from the Cannes Lions, The Marketing Society, Effies, Retail Week, and Marketing Week Data Strategy. She is a proud Fellow at the Marketing Academy and a member of WACL.



### Sabah Naqushbandi

Global Marketing Director,  
MR PORTER

As Global Marketing Director, Sabah oversees all elements of MR PORTER's global marketing offering and advocates the brand and customer experience. She joined the business as a two-year-old start-up and contributed to transforming MR PORTER into an award-winning global online men's fashion retail leader. Key highlights over the years include founding MR PORTER Health In Mind, a content and charity initiative dedicated to helping men lead happier, healthier and more fulfilling lives, building the brand's own label Mr P. to become a top 10 brand, alongside creating the award-winning and world's first shoppable film collection, Kingsman.

Before joining MR PORTER, Sabah worked in the music industry at EMI within the CEO's strategy team, and was responsible for the global roll out of a new model for launching music artists.

Prior to that, Sabah worked across a range of different roles at Procter & Gamble Prestige, and managing the integration of recently acquired beauty and grooming brands in London. Sabah is also a Fellow of The Marketing Academy and Non-Executive Director of The Marketing Society.



### Michael Inpong

Former Strategy and Marketing  
Director at Müller UK&I and  
Co-founder, Sport&Brands

Michael Inpong started his blue-chip career at P&G before moving up to the C-Suites of Nestle and Müller. Michael has now co-founded Sport&Brands a sport consultancy that specialises in uniting sports with brands. Based in Birmingham, Sports&Brand aims to build stronger bridges between the two worlds, while showcasing how sport can drive positive change across equality, diversity and inclusion in society. Michael is also a trustee of the Women's Sport Trust and member of UK Coaching's advisory panel.

# Leading the Personalisation Conversation

A handful of senior marketing leaders had candid conversations with a team of experts from Meta sharing fears and frustrations, opportunities and insights. We've curated their discussion here...

## The questions

We asked our leaders to discuss five different questions:

- 1. Balance between Privacy and Personalisation:**  
How do you fulfil people's desire for personalisation at the same time as respecting an increased demand for privacy online?
- 2. Value Exchange:**  
(Personalised) advertising funds the free internet as we know it. Do people understand the value exchange? Who should be responsible for communicating this?
- 3. Risks and Opportunities for Marketing in the Coming Years:**  
Innovation is essential for brands to succeed. The new era of marketing will be cookie-less and defined by technology that offers effective marketing with less data. For your business, what do you see as the biggest opportunities – and challenges – when it comes to marketing in this new environment?
- 4. Responsibilities and Governance:**  
Who should decide how much data and what type of data people share for advertising purposes? People or Governments/ Legislators? Is everyone in the ecosystem educated enough to make these decisions?
- 5. Organisational Structure:**  
Siloed organisations make it more difficult to plan and react to change and can be a barrier especially for data management. Where do you see pain points or opportunities in your organisation?

# The Marketing Leaders talk to the Meta Experts

### Brand Contributors



**Sabah Naqushbandi**

Global Marketing Director at MR PORTER



**Becky Brock**

Commercial & Customer Director at Costa Coffee



**Roisin Donnelly**

Non-Executive Director at HomeServe



**Mark Evans**

Managing Director, Marketing & Digital at Direct Line Group



**Michael Inpong**

Former Strategy and Marketing Director at Müller UK&I and Co-founder, Sport&Brands

### Meta Contributors



**Russell Pert**

Head of Industry, Financial Services, UK



**Beth Horn**

Head of Industry, Retail & Ecommerce, UK



**Ian Edwards**

Global Connections Planning Director, Northern Europe



**Stephanie Lambert**

Head of Industry, FMCG, UK



**Martin Harbech**

Group Director, Retail & Ecommerce, UK

### How do we strike the balance between privacy and personalisation?

**Roisin:** From an advertiser point of view, there's a huge demand for personalisation. And I really thought things would happen much, much faster. At P&G we were hugely excited by personalisation. For example, Pampers' customers are only with us for two years, so being able to personalise ads for the parents and also knowing the age of the baby was exciting from an advertiser point of view. And we're still excited about personalisation and the opportunities to reduce waste in the media economy where we're paying for lots of people that you don't want or need. People only want to see ads that are relevant to them. So I think there's a huge appetite and demand from the consumer but we have to navigate carefully because it needs to be permission based.

**Mark:** It's a very, very tricky balance between privacy and personalisation. We have a data ethics committee to help us navigate, because one person's interpretation of what's okay, is very different to another's. There are no silver bullets but having a clear position and process around data ethics is important. It's complex because customers want to have their cake and eat it. Indeed, we've had some customers who say I don't want to be part of your marketing collateral and then at the same time other people say, you knew this about me, why couldn't you make it more relevant?

**Becky:** I'm a big proponent of personalisation online because it's a way for people to create connections with relevant information that makes



## THE CONVERSATION

"It's a new world for marketing and brands and this will lead to innovation because we're looking through a completely different lens"

Becky Brock

them more engaged. There is a real value exchange but it needs to be transparent. And the value exchange needs to be explicit, for example, with us it's very clearly linked to our loyalty scheme and there is a reward and benefit for customers signing up – in our instance – free coffees. The exchange is clear. As marketers we've got to stand back and say, is that value exchange fair? Are we treating the data with care in a way that engenders trust?

**Michael:** I believe there are three principles here. First, brands need to respect the guidelines in a legal framework; second, personalisation can delight customers and make their experience better, engineering a positive customer journey, which is the heart of everything. Third, empowering customers to be in control of their privacy when and how they want it.

### How do we communicate the value exchange of the free internet to consumers?

**Roisin:** People generally don't understand that advertising funds the free internet as we know it, because the internet has always been free. So it's a big challenge to go back and tell them, actually, it is quid pro quo and somebody is funding it. It's going to be a big challenge to get people to truly understand the value exchange. And the privacy controls aren't intuitive. There still needs to be a lot of education of kids in school and their parents around safety on the internet. I think there's an opportunity for the media owners to join up and help agencies to get advertisers to do the right thing. I think a lot of the problems are the small advertisers, people who don't know the rules and regulations. They do the wrong thing with data.

**Sabah:** I challenge whether people need to understand the value exchange. Personalised ads do fund the free internet, but do people want to hear that? They want to feel that they can have the internet AND their privacy. And if they give their data, it should be enhancing their experience and it should be on their terms. The big thing that's really important is the transparency around how people's data is being used. We have a section on MR PORTER's site where we actually explain everything from what cookies are, to different cookies, everything from the essential to the functional, the analytical, the advertising and then how they're being used. And at each stage you've got the ability to opt out. People need to understand and be given a choice about what what's been done with their data. So it's about transparency, but it's also about explaining the

value add and the service. People love the way brands like Spotify and Starbucks use personalisation, because the fact that they know you is not seen as invasive, but as a way to provide a service. This piece of knowing that you have given your data and what data you've given is really important. You need to feel empowered. You've given that data and you've allowed for it, versus it feeling like something that's disappeared in front of you.

**Mark:** I don't think many customers understand the value exchange of the free internet. And if they do I don't think they care.

**Becky:** I think there is very little understanding about how the internet is funded.

"That's what's at stake here, delighting the boss – delighting the consumer"

Michael Inpong

## THE CONVERSATION

### Where do the risks and opportunities lie in this new marketing environment?

**Sabah:** Our aspiration is to focus on better collection and activation of first party data, integrating CRM data and first party data into our partner ecosystems. The big thing about first party data is that it returns to the importance of investing in brand and brand building. So a big focus for us at MR PORTER is back to building the power of the brand, in addition to all the whizz bang data tech side of things.

**Beth:** People need to have an understanding of the utility of what they're getting for their data. It has to be with someone that they trust. It has to be with a brand that they care about or they feel that cares about them too.

**Roisin:** Everybody's investing more in first party data. And that's a great opportunity because if you own the data, it's your data and it's your customers. I think the biggest risk is talent. There just aren't enough data people who truly understand the power of data.

**Mark:** If you don't have enough first party data you are at a massive disadvantage. It's now a race to have first party data advantage because without it, everything else is rearguard action.

**Becky:** In a brand world we still need to leave some space for serendipity, because it's that joy when you discover something new. So whilst, I'm for personalisation, you still need a certain degree of randomness added in throughout that. In terms of opportunities, the convergence between IT/

"As marketers we've got to stand back and say, is that value exchange fair? Are we treating the data with care in a way that engenders trust?"

Becky Brock

technology/data and marketing is a really interesting transaction that we haven't seen before. There is opportunity to be really creative using these platforms and data flows in order to be inspiring and engaging for the consumer, rather than just taking data to cut for an email. It's a new world for marketing and brands and this will lead to innovation because we're looking through a completely different lens.

**Martin:** Trusted brands who are strong will be the winners over time in this new model.

**Michael:** The opportunity lies in bringing even more delighting of the customer. And that's what's at stake here, delighting the boss – delighting the consumer.

### Where does responsibility for governance lie?

**Mark:** I think there's some shared responsibility here. I think there's a role for regulation but it needs to be considered in a more strategic way. It's the long tail where most of the dodgy stuff is, rather than big brands who wouldn't risk their reputation in that way.

**Sabah:** People need to feel empowered with their own data. In theory, in an ideal world, governments shouldn't be acting as gatekeeper but the reality is you should have some regulation. But the product is just moving too fast and everybody's trying to keep up. The biggest danger when you try and implement legislation is that it's not effective or doesn't address the issue. Typically, the cost of legislation is a cost incurred by business and we don't want legislation to benefit the biggest companies who can more easily absorb the costs. The way the world works now is that there needs

"We need to wake up as an industry and self regulate, with the help of great media owners"

Roisin Donnelly

## THE CONVERSATION

"If you don't have enough first party data you are at a massive disadvantage"

Mark Evans

bombarded with the wrong messages but most of it is coming from small companies who are tarnishing the name of advertising. The media owners need to reach out to these people and stop what they're doing. I think we've got to regulate ourselves. We've got to be responsible. A few times, I've done events at the House of Commons and there's only a handful of people who understand what digital is. The current legislation that's going through is hitting the tip of iceberg and missing 95% of the issues we're facing today. We need to wake up as an industry and self regulate, with the help of great media owners.

"We need to be organising ourselves around the key challenges and opportunities of the customer journey around the customer lifecycle. This will evolve new agile ways of working and empowering more multi-disciplinary teams"

Sabah Naqushbandi

to be a lot of cross collaboration at a macro level when it comes to government, especially around regulation.

**Russell:** Privacy officers and lawyers don't really understand the technology and therefore it's a real challenge for them to grasp how consent flows would work and how it fits into customer retention and customer marketing.

**Becky:** An example where this has gone wrong at the moment, is the cookie, it's so confusing. It's a piece of legislation that has failed because consumers don't understand what it really is. Legislation has to be consistent, it has to be done in a simple way that consumers can understand and then you're building trust rather than creating legislation for legislation's sake. In an ideal world, there would be a self-governing, independent industry body.

**Roisin:** Advertisers want better targeting and consumers want targeted advertising. I think this means a lot less advertising. People are

### Where are the pain points in your organisational structure?

**Sabah:** Everyone's wrestling with the idea of what the future organisational set up might look like. I think the reality is, the organisational structure is also dependent and enabled by data and tech, so you have to look at the day to day technology and operation together. We need to be organising ourselves around the key challenges and opportunities of the customer journey around the customer lifecycle. This will evolve new agile ways of working and empowered more multi-disciplinary teams. Today's winners are those who can make fast decisions and move at speed, and breaking down silos helps.

**Mark:** We have a data chapter within our Agile model. The data chapter is where we're setting up our data strategy, data ethics, and governance structures as well as building our data infrastructure. In terms of using the power of our database through the full funnel on a day to day basis to deliver personalisation at scale we believe that we are still fairly embryonic and have masses to go after.

**Michael:** There have been two pressure points. The first is on the IT side - how do we make sure we have the internal capacity. And second is legal - where is the data stored? Is the jurisdiction being managed? □

# Four strategic insights to inform your personalisation journey

Seize opportunity

Be transparent



Build brand trust

# EXECUTIVE SUMMARY

## Build brand trust, build brands

Brands that succeed in this space, are those that continue to remember what we've always known – building brands and building brand trust, builds growth.

1. Stick with what you know best – building brands, building brand trust
2. When in doubt, return to your fundamental role as brand guardian
3. Create high expectations around creativity and personalisation.

**Becky Brock:** "Strong brands that are trusted will come up the winners over time in this new model. With more restrictions on data, it's going to be the best brands, those that are the most engaging and the most trusted that will gather the best data. Then it's up to us to deliver the most creative content. Let's have higher expectations."

## Be transparent in the shade

This new world is not simple, or black and white. We must learn to be comfortable in shades of grey by holding firm to our brands' values.

1. Hold firm in the grey areas of this new world using your brand's integrity as a compass
2. Make it easy for your customers to understand the value exchange
3. How might you lead the way in transparency?

**Sabah Naqushbandi:** "The big thing that's really important is the transparency around how people's data is being used. People need to understand and be given a choice about what what's been done with their data. So it's about transparency, but it's also about explaining the value add and the service. People love the way brands like Spotify and Starbucks use personalisation, because, the fact they know you, is not seen as invasive, but as a way to provide a service."

## Sieze the opportunity for innovation

Innovating in this space requires three vital ingredients – courage, skill and integrity.

1. How can you mine first party data to improve customer experience?
2. How can you collaborate internally and externally to innovate in this space?
3. Look for new ways to delight your consumers?

**Mark Evans:** " If you don't have enough first party data, you are at a massive disadvantage. We'll see a lot of brands looking to go direct to consumers and create an ecosystem. We're very focused on how we get consent to use this data and make the most of it. It's a first party arms race."

## Put customers at the heart

The number one rule for personalisation is well-known to marketers – delight the consumer.

1. Use personalisation to delight the customer
2. What can you do to make their life easier?
3. Remember delighting customers also means respecting their privacy.

**Roisin Donnelly:** "We need to really understand, what does the customer want? What does the customer need? Who is the customer? And I hope we can educate them better. We must be absolutely customer obsessed in everything we do."



