# CM BRIEFING

# Personalisation vs segmentation

'Personalisation' is a term very much in fashion at present. It is used by vendors to sell their products, and promoted by website and intranet managers as a way of delivering a brave new era of functionality.

Separate from debates regarding the merits and approaches to personalisation, there is considerable confusion about the meaning of the word itself.

As the use of personalisation spreads, this confusion has grown. Personalisation is now routinely used for everything from 'my links' functionality, to fine-grained targeting of information to specific staff roles.

The absence of consistent terminology in this space is now causing considerable difficulty for purchasers of technology, and organisations in general. Without a clear understanding of what is being meant, it is often difficult to assess the value of products, and even harder to measure the success of personalisation features.

At the risk of introducing still more terminology into this fragmented marketplace, this briefing will draw a clear line between two separate functionalities:

- *Personalisation*, whereby individual users can choose or configure what is delivered to them.
- *Segmentation*, where organisations tailor or selectively deliver information or tools to specific audience groups.

This briefing will explore each of these categories, hopefully bringing some measure of clarity to this space.

## Personalisation

This covers all situations in which the end user is given the capability to customise or tailor the features provided, or how information is delivered to them.

This covers simple functionality such as:

- my links
- my documents
- choosing portal elements ('portlets')

Personalisation also includes richer functionality such as selecting news channels, or setting preferences in HR and travel systems.

Personalisation (as defined here) is the most commonly implemented functionality, and is often the simplest to deploy.

Doubts are raised, however, about the degree to which users make use of this functionality, and simple personalisation can struggle to demonstrate the benefits delivered to the organisation.

## Segmentation

Instead of leaving it to end users to configure interfaces, segmentation involves the organisation more actively tailoring what is delivered to specific groups or roles.

This may include:

- targeting the delivery of individual documents
- providing tailored 'portals' for specific groups
- segmenting the whole site by audience

There is a strong argument for benefits delivered by segmentation, particular as a way of overcoming the 'information overload' experienced by end users.

The challenge is, and always will be, the considerable resources that need to be devoted to planning and managing segmentation, recognising that the responsibility now rests with central teams to ensure that users are provided wth the right information.

For this reason, segmentation is often only implemented in simple ways, with more powerful capabilities left to future projects.

## Conclusion

Both personalisation and segmentation are potentially valuable. Organisations can make the most informed decisions when they can clearly distinguish between these two quite separate approaches.

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