IBM WebSphere Personalization

Personalize **Your Site For Each Visitor**
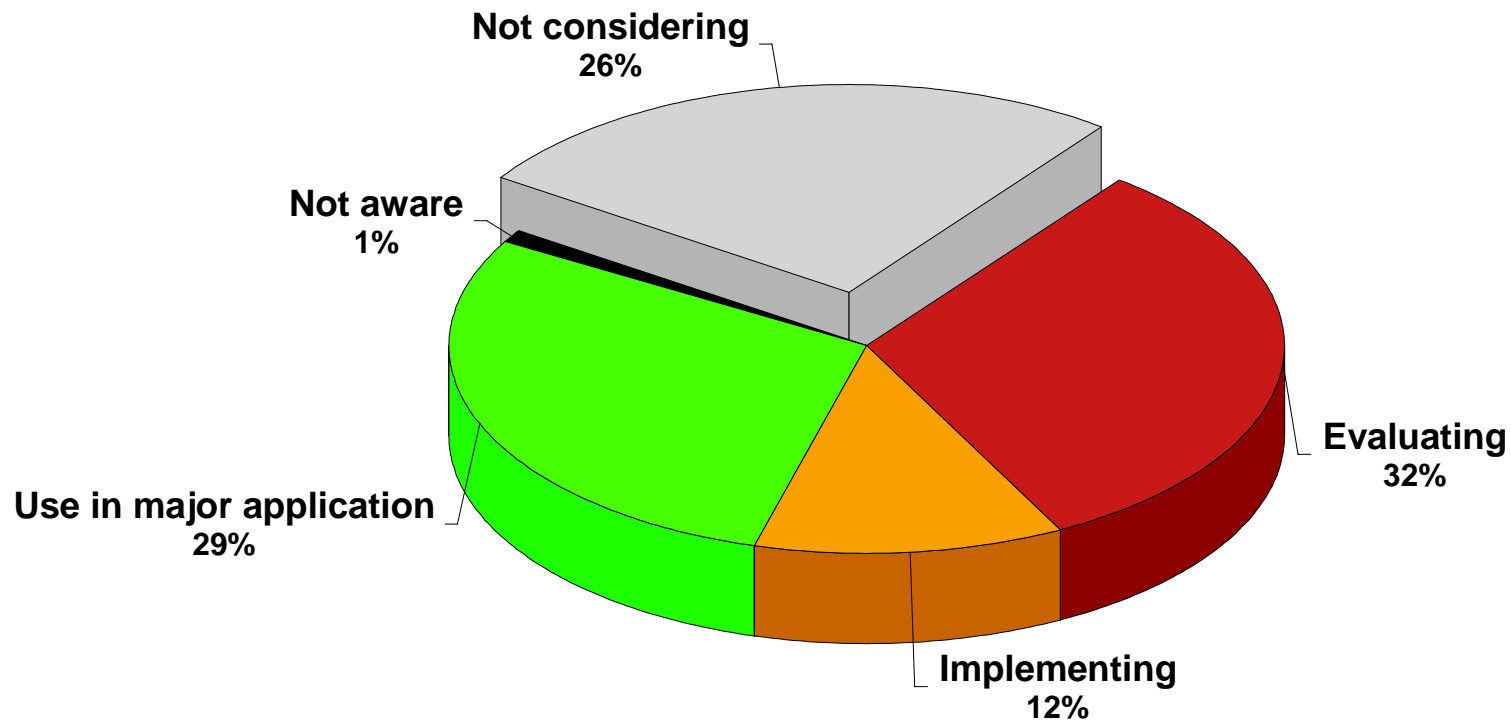
August 3, 2000

Topics

- **Where personalization is used today**

- **What is required to build a personalized site**

- **The WebSphere solution**

Use Of Personalization

Personalization:
**Targeting web content & applications to specific users**

Not considering
26%

Not aware
1%

Evaluating
32%

Use in major application
29%

Implementing
12%

Percent of companies evaluating or using personalization

Source: IBM market survey

Personalization's Benefits And Uses

Targeting web content & applications to specific users.

Where Companies Are Using It

- B2C site — 88%
- B2B site — 85%
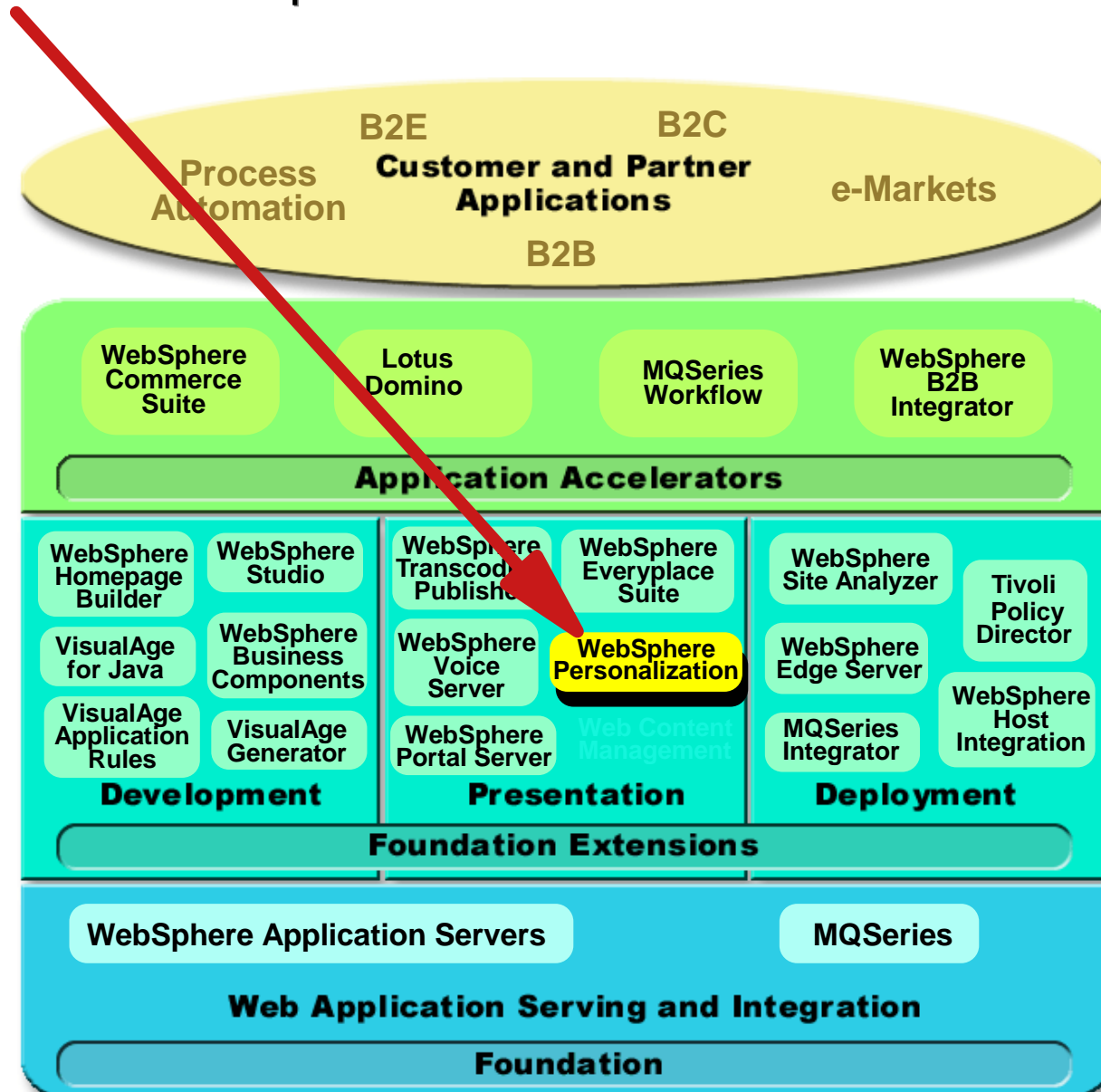- Intranet — 76%
- Extranet — 63%
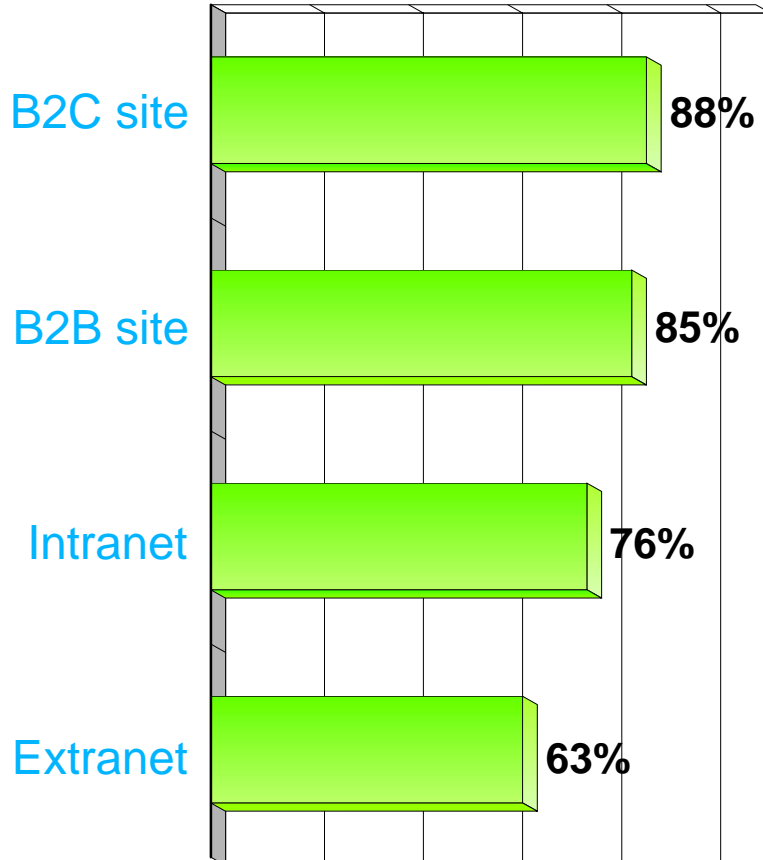
Sample Benefits

- Visitors remain longer on a site and return more often leading to increased sales

- Sites become easier to use leading to improved service for your site's audience

- Site content becomes more relevant for each visitor making the site more useful for them

- Sites become more interesting thus attracting a larger audience
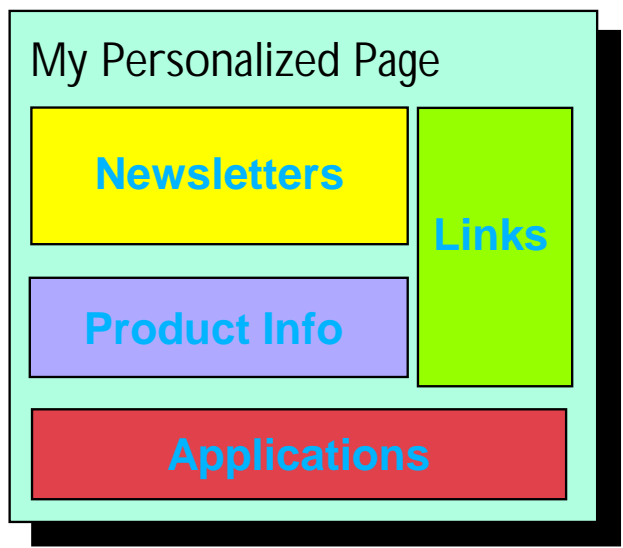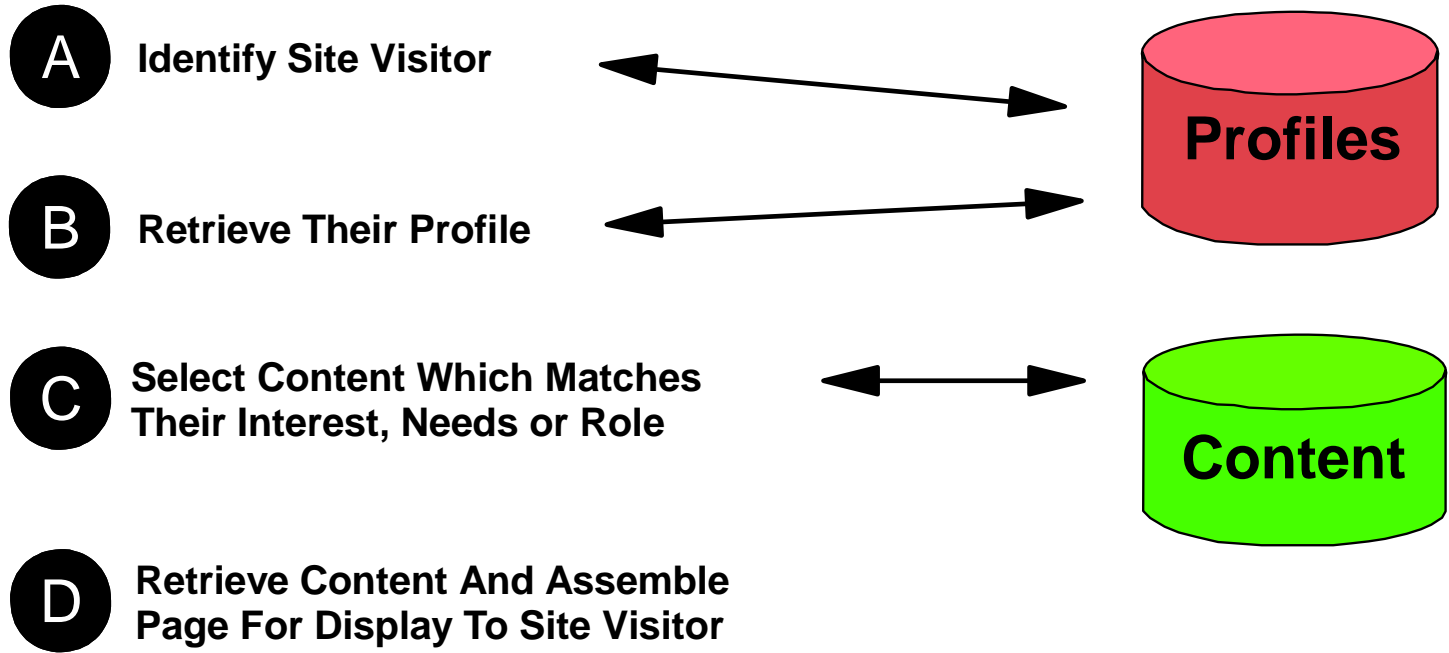
Source: IBM market survey

BM WebSphere

One of the new additions to the platform IBM WebSphere Personalization V3.5

B2E

B2C

Process Automation

Customer and Partner Applications

e-Markets

B2B

| WebSphere Commerce Suite | Lotus Domino | MQSeries Workflow | WebSphere B2B Integrator |

Application Accelerators

WebSphere Homepage Builder	WebSphere Studio	WebSphere Transcoding Publisher	WebSphere Everyplace Suite	WebSphere Site Analyzer	Tivoli Policy Director
VisualAge for Java	WebSphere Business Components	WebSphere Voice Server	**WebSphere Personalization**	WebSphere Edge Server	
VisualAge Application Rules	VisualAge Generator	WebSphere Portal Server	Web Content Management	MQSeries Integrator	WebSphere Host Integration

Development · **Presentation** · **Deployment**

Foundation Extensions

| WebSphere Application Servers | MQSeries |

Web Application Serving and Integration

Foundation

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Elements Of Personalization

A   **Identify Site Visitor**

B   **Retrieve Their Profile**

C   **Select Content Which Matches Their Interest, Needs or Role**

D   **Retrieve Content And Assemble Page For Display To Site Visitor**

Profiles

Content

Visitor enters site

BM WebSphere

My Personalized Page

Newsletters

Links

Product Info

Applications

WebSphere Foundation

BM WebSphere

WebSphere Application Server

HTTP requests

Servlet
- *Processes inputs*
- *Call Java Server Page*

Java Beans can contain business rules that retrieve personalized content
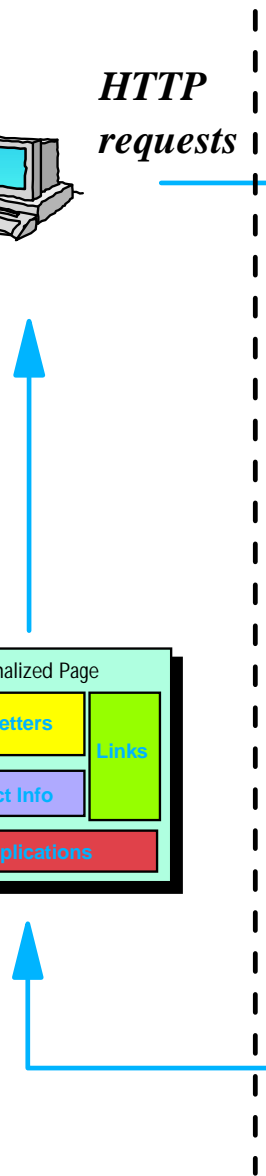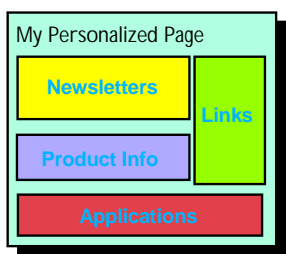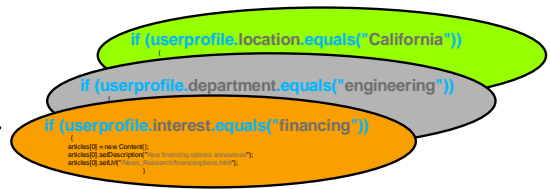
Java Server Page
- *BEANS execute business logic*
- *Template for page assembly*

```
if (userprofile.location.equals("California"))
if (userprofile.department.equals("engineering"))
if (userprofile.interest.equals("financing"))
    {
    articles[0] = new Content();
    articles[0].setDescription("New financing options announced");
    articles[0].setUrl("News_Research/financeoptions.html");
    }
```

My Personalized Page
- Newsletters
- Links
- Product Info
- Applications

Output page processing
- *Produces HTML*
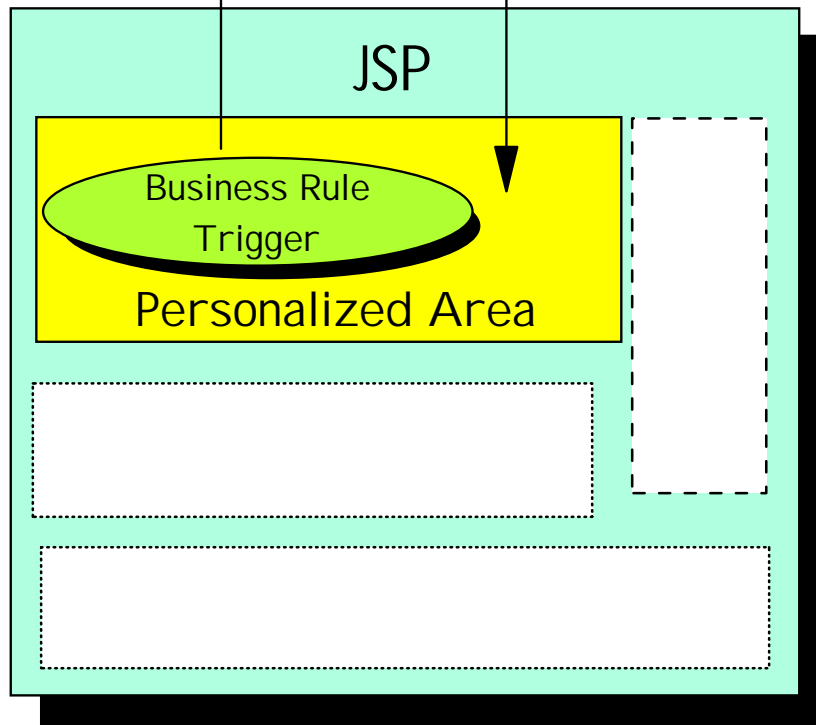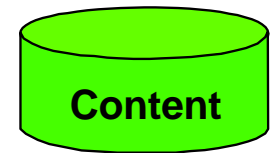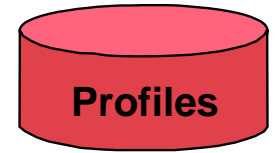
WebSphere Business Rules

- **Classify a site visitor**
  - What service level are they entitled to - gold, platinum
  - What organization are they in HR, engineering, marketing
  - What interests them - skiing, sailing .....
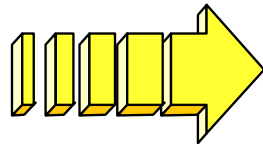 - ....whatever your business categories are

- **Action to be taken**
  - Select a specific content type

- **Binding combine a classification + action rule**
  - e.g. If Customer is gold select premium awards information

Classifier

Rules are created using a
sentence like template

CustomerLevel is
    Gold
        when Resource.Attribute is Value

Business Rules Created Using Point & Select Menus

BM WebSphere

CustomerLevel is
Gold
when Resource.Attribute is Value

Specify Attribute

Select the Attribute :

Article	CompanyName
Product	Email
Profile	Enterprise
Promotion	Industry
Today	TotalSales
	Username

Specify Evaluation

Select the Evaluation:

is equal to
is not equal to
is less than
is greater than
is less than or equal to
is greater than or equal to
is between
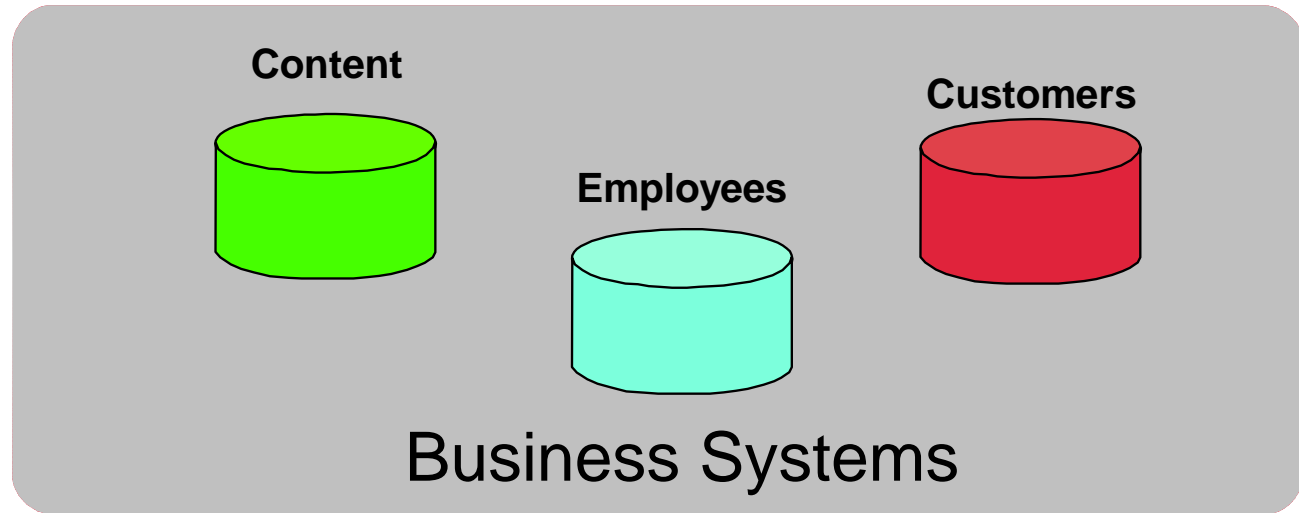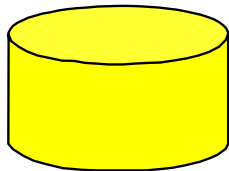is between but not equal to
is included in

Specify Value

Specify a value or choose the value of another attribute:

10000

CustomerLevel is
Gold
when Profile.TotalSales is Greater Than 10000

Where The Data Comes From

Information Collected On The Site

Content

Customers

Employees

Business Systems

Resource Engine

Surfaces/Normalizes Profiles/Content For Usage By WebSphere Personalization
Interact with via Java Interfaces using Java Beans or EJBs
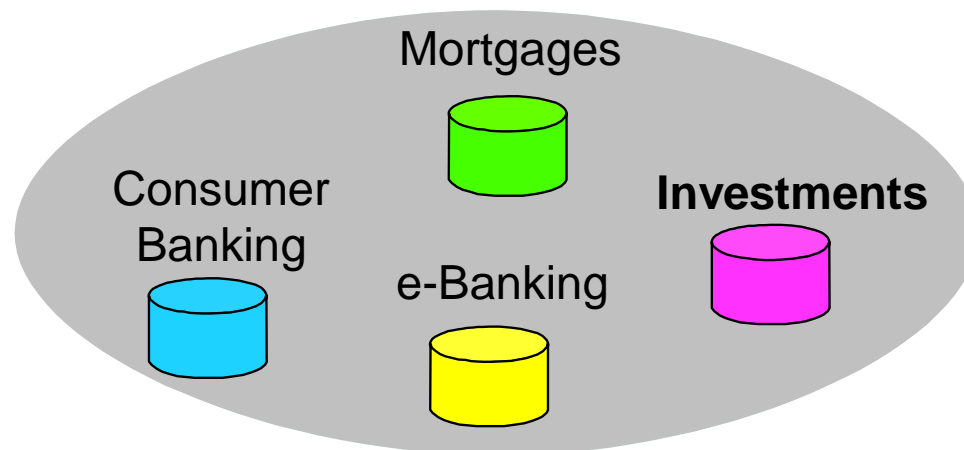

Specify Attribute

Select the Attribute :

Article	CompanyName
Product	Email
Profile	Enterprise
Promotion	Industry
Today	TotalSales
	Username

BM WebSphere

Benefit Of Combining Resources

Sample Scenario: Financial Institution

★ **Customer** has a savings account in the banking subsidiary

★ **And** Has also previously invested with the mutual funds subsidiary

★ **And** Has not invested recently but has accumulated a high balance in the savings account

★ **Action =** Present recent rates on index funds as a potential low risk way to maximize return

Customer sees consolidated page of account information
Financial institution has opportunity for cross selling

Recommendation Engine

Delivers recommendations based on

1. Preference engine
   - Explicit preferences

2. Clickstream engine (real time)
   - Content viewed, Added to shopping cart ..

3. Purchase engine (history)
   - Items bought, How many times bought ...

4. Item Affinity
   - Products frequently purchased together

5. Product matching
   - Based on product similarities

Example:

- Placed towels in shopping basket
- Likely to also buy bed sheets
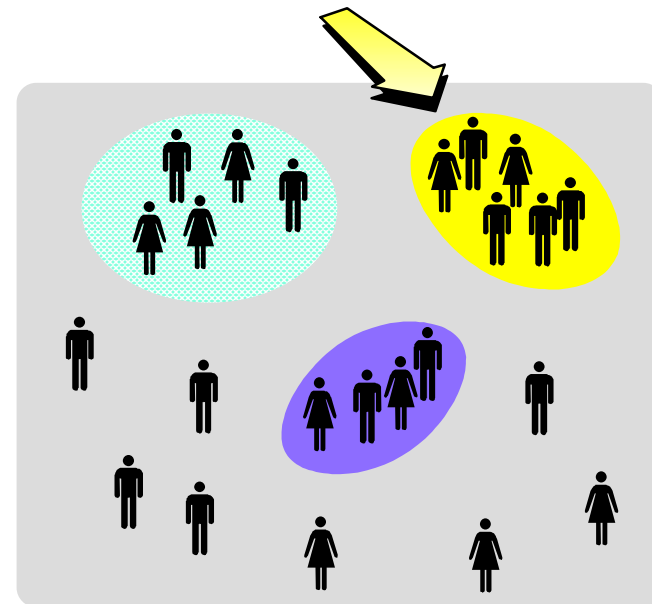
Complementary to business rules
   - Uncovers new buying patterns that may not be captured in business rules
   - Adapts to changes in buying patterns without the need to create new business rules

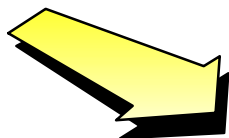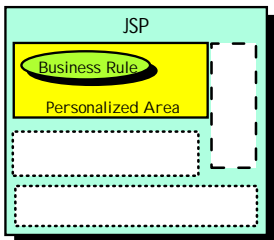**Uses LikeMinds Personalization Server V5.0 developed by Macromedia**

Solution Elements

BM WebSphere

Web Site Developer

WebSphere Studio Advanced Edition

Business Rule Editor

JSP
Business Rule
Personalized Area

WebSphere Collaborative Profiles

Expansion Pack
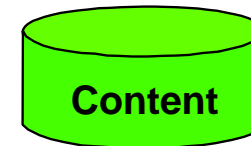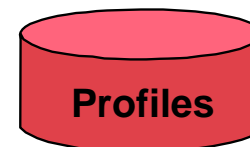250,000 additional registered users

WebSphere Personalization

Recommendation Engine

25,000 registered users

Rule Engine

Resource Engine

EJB's or Java Beans

Profiles

Content

WebSphere Application Server

Advanced Edition

Enterprise Edition

- *AIX, Solaris, NT, W2000, HPUX, AS400*

Notes

1. The 25,000 user capability of the Recommendation Engine is not extended by the purchase of an additional license of WebSphere Personalization. Registration of more than 25,000 users in the Recommendation Engine requires purchase of WebSphere Collaborative Profiles.

2. The Recommendation Engine currently supports NT, W2000 and Solaris

Example Configuration And Prices

BM WebSphere

WebSphere Studio Advanced Edition
Business Rule Editor
➡ **$1,999 per install**

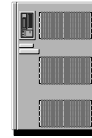**WebSphere Collaborative Profiles**
Expansion Pack
250,000 additional registered users
➡ **$79,000 per install**

+

Recommendation Engine
25,000 registered users
➡ *Included in* **WebSphere Personalization**

Recommendation Engine Client
Rule Engine | Resource Engine
➡ **$10,000 per processor**

WebSphere Application Server Advanced Edition
➡ **$7,500 per processor**

AIX, Solaris, NT, W2000, HPUX, AS400

Recommendation Engine Client
Rule Engine | Resource Engine
➡ **$10,000 per processor**

WebSphere Application Server Advanced Edition
➡ **$7,500 per processor**

AIX, Solaris, NT, W2000, HPUX, AS400

Sample WebSphere Component Pricing
Configuration #1
Only Rules Engine In Use

	Servers	Processors Per Server	Additional Users Registered In Recommendation Engine	Chargeable Units	List Price Per Unit	Total List Price
WebSphere Studio Advanced Edition	not applicable	not applicable	not applicable	5	$1,999	$9,995
WebSphere Personalization	8	2	not applicable	16	$10,000	$160,000
WebSphere Collaborative Profiles	not applicable	not applicable	0	0	$79,000	$0
WebSphere Application Server Advanced Edition	8	2	not applicable	16	$7,500	$120,000

Total List == $289,995

Note:

The above is intended to demonstrate how the WebSphere components are priced and does not does not include all prerequisites for an operational system

Sample WebSphere Component Pricing
Configuration #2
Both Rules and Recommendation Engines In Use

	Servers	Processors Per Server	Additional Users Registered In Recommendation Engine	Chargeable Units	List Price Per Unit	Total List Price
WebSphere Studio Advanced Edition	*not applicable*	*not applicable*	*not applicable*	5	$1,999	$9,995
WebSphere Personalization	8	2	*not applicable*	16	$10,000	$160,000
WebSphere Collaborative Profiles	*not applicable*	*not applicable*	500,000	2	$79,000	$158,000
WebSphere Application Server Advanced Edition	8	2	*not applicable*	16	$7,500	$120,000

Total List ==: $447,995

Note:

The above is intended to demonstrate how the WebSphere components are priced and does not does not include all prerequisites for an operational system

BM WebSphere

WebSphere Personalization

- **Choice of business rules and collaborative filtering technology**
  - ▶ *Choose the mix of personalization strategies that are optimum for your site's business objectives*

- **Easy entry of business rules**
  - ▶ *A tool for the non-programmer*
  - ▶ *Seamlessly integrated into the web site development environment*

- **Extensive support for integration with multiple sources of profiles and content**
  - ▶ *Improved selection of content by accessing multiple sources of profiling information*

- **Built on and benefits from the WebSphere architecture**
  - ▶ *Scalable to meet your needs - utilizes the JSP and EJB architecture*
  - ▶ *Choice of platform - AIX, Solaris, NT, W2000, HPUX, AS400*

- **Complemented with a rich suite of WebSphere offerings**
  - ▶ *Transcoding, speech, site analyzer, edge server ....*