

## Two frameworks for CDP use cases

**You should examine your use cases from two very different perspectives:** first, from the data you can collect from devices, and second, from the perspective of your customers as human beings.

For example, “promote my iPad app to visitors” can stop at the device level, while “promote my e-newsletter to people who don’t have it” requires more information.

On the other side, you have to remember that devices are not people, that people have many devices, and often many personas. If you merge these personas into a “single customer record,” you can annoy your customers and damage your use cases.

### Summary:

CDP use cases focus too heavily on what can be measured and don’t take enough stock of the human experience.

### The Device Framework



- A device (not a person) makes a request to a server.
- That device shows some activity.
- Identifiers allow better segments.
- Some identifiers resolve to a person with varying degrees of confidence.

### The Person Framework



- A person is more complicated than your data structure.
- Each person has multiple devices.
- Each person has multiple identifiers.
- People organize their online life into personas.

**I’ll be discussing how to use these frameworks on March 29th at the MarTech conference.** Or you can give me a call and I’ll talk you through it.

## Send your employees to New York

While everyone is debating remote vs. in-office work, I recommend something that could be far more consequential. **Get people out of their routines!**

Some of the most productive thinking time I've had has been on train rides to New York. Here's the basic schedule.

### Summary:

The productive creativity you'll achieve by getting your employees out of their routine will more than justify the cost.

1. **Pick a topic to research**, print out relevant white papers and articles, find links to YouTube videos, podcasts, etc., and get them all ready for your trip.
2. **Devour it all on the ride out**, highlighting, taking notes, asking questions, etc. It's good to switch between reading, watching, and listening. Then go do whatever you had planned in New York and forget all about it.
3. **Relax on the ride back**. Get a beer and start a very light attempt at organizing your notes and comments from the morning. But don't organize too much. **The point of this exercise is to be creative.** You want your brain in big-picture mode. You'll find you have ideas that have nothing to do with the topic you studied in the morning. That's a good thing.
4. **Jot down notes. Start on a rough outline.** Capture as much of your creative insights as you can. But be relaxed about it. Your subconscious mind is doing a lot of work you're not even aware of.
5. **Go home and sleep.** This might be the most important part. While you're sleeping, your brain does amazing things.
6. The next day, **look at your notes and your outline with fresh eyes.** You'll discover that your sleeping brain came up with new thoughts and insights.
7. **Refine the outline**, extract takeaways, and note new areas to study and new questions to ask. You'll be amazed at what you come up with.

A few things to consider about this method.

**Part of the value of this exercise is simply getting out of your normal routine.** You could do something similar with a walk in the park, although it's easier to read and take notes in a seat on a train.

**There doesn't have to be an event.** You can just go to New York and have coffee with one friend and lunch with another.

The crucial components are to have enforced periods of time in which you (in this order) ...

1. Focus your attention,
2. Are distracted,
3. Think creatively,
4. Sleep on it, and
5. Summarize and organize.

**The value you'll get as a business owner by sending your employees off to New York for a day will far exceed the cost of the trip and the lost day of in-office productivity.**

## A subscriber retention checklist

**Renewals are crucial to subscription publishing models, and engagement is crucial to renewals.**

Here are some questions to ask about your retention efforts, and some ideas about measurement and tools.

I'm sure you're justifiably proud of the good service you provide, but here's a hard truth: access to your content is not a benefit for anyone. **The benefit you provide is what subscribers can do because they have your content.** Explore new ways your content can be practically useful to your subscribers, and communicate those benefits to them throughout their experience with your brand.

### What does your subscriber really want?

Understand your customers' expectations.

- What are their goals?
- Where can they achieve quick wins?
- What are their success benchmarks?

### How might subscribers be confused?

- Find out with user groups, or user testing
- Make it easy for customers to learn how to use your service
- Provide training videos
- Eliminate friction wherever possible
- Make sure customers are comfortable with your service
- Make getting help very easy

### How can you make your service a habit?

- Consider which of your customers' daily routines are solved by your service
- Find ways to make your content essential to their daily workflow
- Provide information in different formats (quizzes, polls, infographics)

- Be trustworthy
- Create an active community around your content

### How can you measure engagement?

- Logins / month
- Pages / session
- Time on site
- Time on page
- Comments
- Social media shares
- Subscriptions to e-newsletters
- Open/click rate on e-newsletters

### Engagement / retention tools

- Welcome email
- On-site messaging
- App download
- Videos on how to use the site
- Product tours
- One-on-one guidance
- Journeys for new customers
- Chat with customer support
- Simple feedback mechanisms
- Surveys to measure progress against subscriber goals

## Taming the “open-ended question” beast

**People prefer to respond to open-ended questions over picking one of your canned options.** But everyone who has created a survey and evaluated results knows it's a bother to review and quantify open-ended responses.

There are AI solutions that can summarize your open-ended answers. Look at Canvs AI, MAXQDA, Nvivo, Caplena, Bellomy, or search on "how to analyze open-ended survey questions."

You might even be able to do this in ChatGPT.

By the way, **I do not accept referral fees.** When I mention a technology, I have no stake in whether you use it or not. My advice and comments are entirely independent.

**Email or call if you want to discuss these or other issues.**  
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