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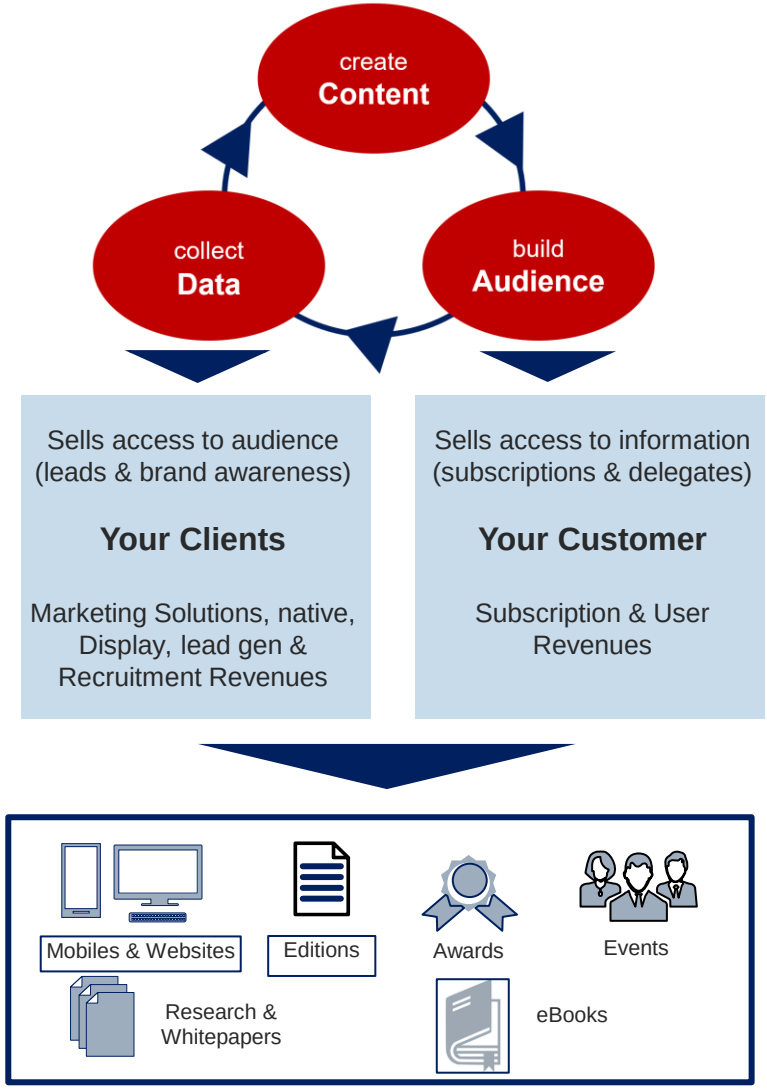
How to use technology to deliver your digital strategy

Prepared for Renewd by John Barnes
February 2025

What is a digital strategy?

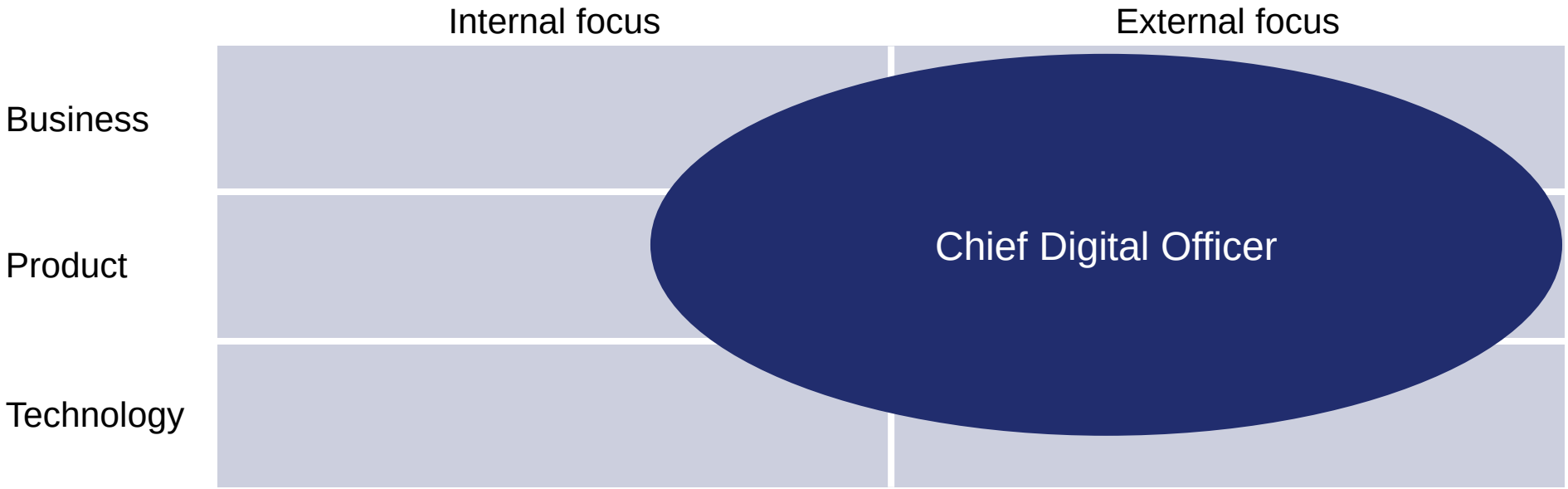
- Content is the foundation, it builds audience and creates data
- Data informs the development of content and audience
- It should be a continuous cycle
- Commercial growth and NPD is driven by this ecosystem
- It powers transformation and delivers business intelligence and creates value
- Building blocks are:
    - Focus on audience experience
    - A change culture with support from the top
    - Addressing skills gaps
    - Maintaining an agile business and technology structure
    - Use data as a strategic asset
    - Clear governance policies around decision making
    - Set SMART KPIs and measure against them relentlessly



Signs that a company might need digital leader

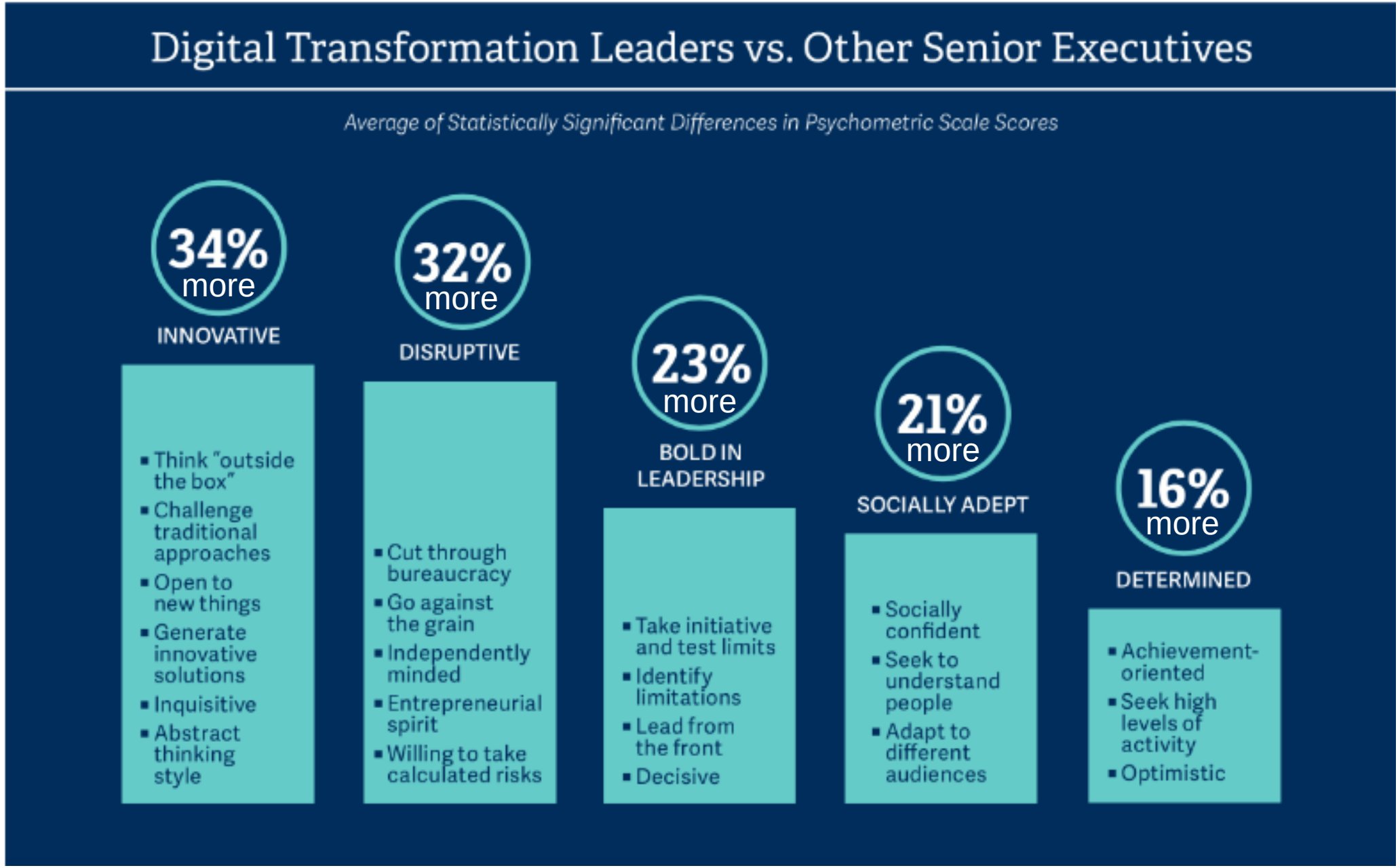
- **Lack of technical expertise**: If technical expertise is lacking in making informed decisions about technology investments, selecting the right solutions, and guiding the technology team
- **Inefficiency in software development**: If software development processes are inefficient, ineffective, or produce low-quality software products
- **Outdated technology infrastructure**: If technology infrastructure is outdated, not scalable, or unable to meet current and future needs
- **Lack of innovation**: If the company is falling behind in terms of technological advancements and is not leveraging new technologies to improve its products and services
- **Strategic alignment**: If there is a lack of alignment between technology investments and the company's overall business strategy
- **Cybersecurity vulnerabilities**: If the company is experiencing cybersecurity issues or lacks proper protocols to protect its technology infrastructure
- **Lack of technical leadership:** If the company lacks a technical leader who can provide guidance and expertise in technology-related matters
- **Inability to attract and retain top technical talent**: If the company is struggling to attract and retain top technical talent

What is a digital leadership?



- Digital leadership is the strategic use of a company's digital assets and emerging technologies to achieve business goals.
- A digital leader is a person who guides this digital approach within an organisation.
- A digital leader is proactive, responsive to customers' needs, delivers better products and services and adapt to a changing environments

- Aspects of digital leadership
  - Training and growth mindset
  - Data collection and management
  - Agile organisation
  - Digital marketing
  - Information and data security



study from [Russell Reynolds Associates]


UNIVERSITY OF OXFORD
Saïd Business School
Oxford Future of Marketing Initiative
THE CHIEF DIGITAL OFFICER
IN RESPONSE TO THE CHALLENGE OF A BUSINESS WORLD BEING TRANSFORMED BY TECHNOLOGY A NEW C-SUITE ROLE HAS EMERGED--
THE CDO'S ROLE IS TO TRANSLATE TECHNOLOGICAL AND NEW MARKET TRENDS INTO ORGANISATIONAL CAPABILITY
THEY ACT AS THE INTERFACE BETWEEN THE ORGANISATION AND ITS ENVIRONMENT
IN ORDER TO SUCCEED, THE CDO HAS TO FACE, AND MANAGE, SEVERAL PARADOXES...
DISRUPTOR
TRANSLATOR
INTEGRATOR
THEY HAVE TO WEAR DIFFERENT HATS--
--WHEN TALKING TO DIFFERENT AUDIENCES!
THEY MUST STOP JARGON GETTING IN THE WAY OF CHANGE
--TO THE DIGITAL FUTURE
A CDO MUST BE A PROTAGONIST- THEIR WORK MUST STAND FOR SOMETHING
YOU'VE DONE AN EXCELLENT JOB!
--SO WE'RE LETTING YOU GO!
IF THEY ARE SUCCESSFUL THEY WILL MAKE THEMSELVES OBSOLETE
THEY MUST MAKE SURE THEIR BOSSES - AND THEIR BOSSES' BOSSES - "GET IT"
DESPITE THE JOB TITLE THE ROLE IS REALLY ABOUT CHANGING PEOPLE, PROCESS AND CULTURE
THERE IS NO SHARED UNDERSTANDING OF WHAT THE CDO'S ROLE INVOLVES
HANG ON, WHY ARE YOU HERE EXACTLY?
BEING A CDO IS LIKE TRYING TO CHANGE A TYRE WHILE THE CAR IS RUNNING
TO DO
CDOS REPORT FEELING BOTH OVERWHELMED AND EXCITED
TO SUCCEED, THE CDO HAS TO DRIVE TRANSFORMATION FAST WHILE LETTING THE ORGANISATION BELIEVE IT IS EVOLVING GRADUALLY
FROM THE ANALOGUE PAST--
COME ON, MOVE!
BUT I'M COMFY HERE!
CDOS STRUGGLE WITH BOTH EXTERNAL PRESSURE TO CHANGE AND INTERNAL APATHY
OHHH - ARE YOU THE GUY WHO RUNS OUR FACEBOOK PAGE?
CAN YOU HELP ME SYNC MY SMARTPHONE?
COLLEAGUES CAN TEND TO MINIMISE THE ROLE
CDOS HAVE TO BE BOTH INSIDERS AND OUTSIDERS - ON THE ONE HAND LOOKING OUTSIDE THE ORGANISATION TO IDENTIFY NEW TRENDS AND SOLUTIONS ON THE OTHER WORKING INSIDE TO EFFECT CHANGE

How should you categorise your technology?

The diagram, on the next page shows, the system is made up of five core elements:

- **Content/Experience Management (DXP/CMS)**
  - A collection of software that works together to power digital experiences from inception to delivery
- **Customer Data Platform / Data Management Platform (CDP/DMP)**
  - Collects and unifies first-party customer data from multiple sources to build a coherent SCV
- **Marketing Automation Platform (MAP)**
  - A single automation platform to manage every aspect of every campaign from the same place
- **Customer Relationship Management (CRM)**
  - A system that helps keep customer contact details up to date, track every customer interaction, and manage customer accounts. It is designed improve customer relationships and also Customer Lifetime Value (CLV)
- **BI and Analytics Suite**
  - These services analyse macro level data, and should also be able to explore individual user stats, to report on traffic trends, content trends, device, O/S and browser stats, Conversion tracking, keyword referrals, third party referrals and funnel reports. Ultimately it helps segment users and build personas

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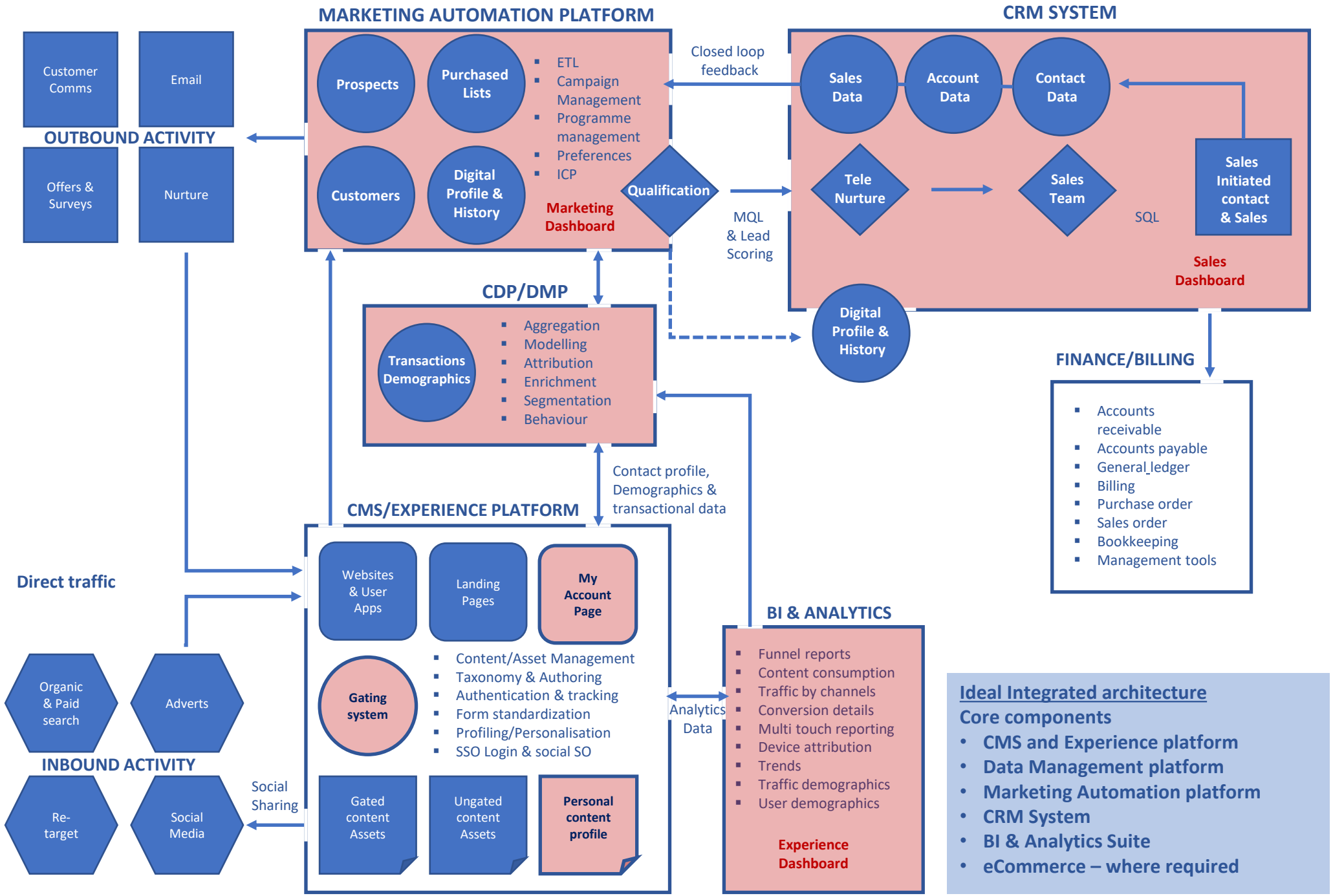


Ideal Integrated architecture

Core components

- **CMS and Experience platform**
- **Data Management platform**
- **Marketing Automation platform**
- **CRM System**
- **BI & Analytics Suite**
- **eCommerce – where required**

Different data types

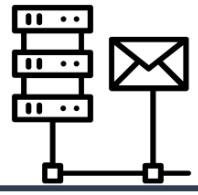
Zero party data	First party data	Second party data	Third party data
Direct relationship with customer	Direct relationship with customer	Indirect relationship with customer	Indirect relationship with customer
Collected with consent	Collected with consent	Collected with consent	Depends but often collected without tconsent
Individual data	Individual data	Individual data	Aggregated data
High Accuracy and reliability, Long term, builds up over time	High Accuracy and reliability, Long term, builds up over time	High Accuracy and reliability, usually medium term	Low Accuracy and reliability, Short term and limited
Not shared	Not shared	Shared only with trusted partners	Widely shared with many companies
Examples: • Personal details • Company details • Comms preferences • Product preferences	Examples: • Behaviour • Saved articles • Email preferences • Purchase history • Download history	Examples: • Additional data such as Spend, Loyalty, product purchases, customer stage provided by a trusted partner	Examples: • Assumed data such as websites visited, adverts seen, advert clicked on, assumed cohort group • Harvested from multiple sources

High level zero and first party data model

Free Access

WR CDP

MAP, BI & Analytics

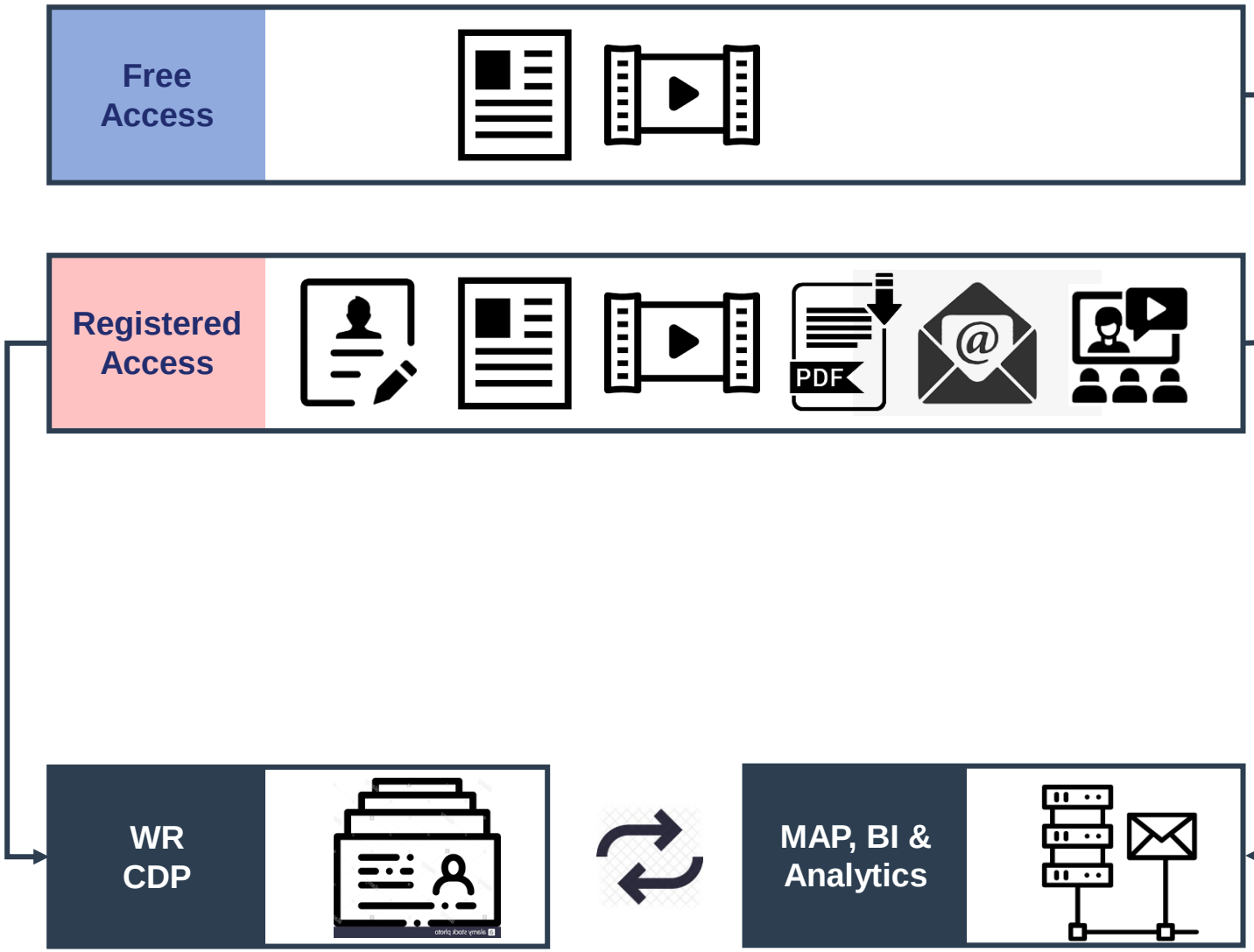


Key data points for WR data model

Behaviour

- Articles read
- Topics read
- Frequency of visit
- Articles shared
- Devices & locations
- Articles printed

High level zero and first party data model



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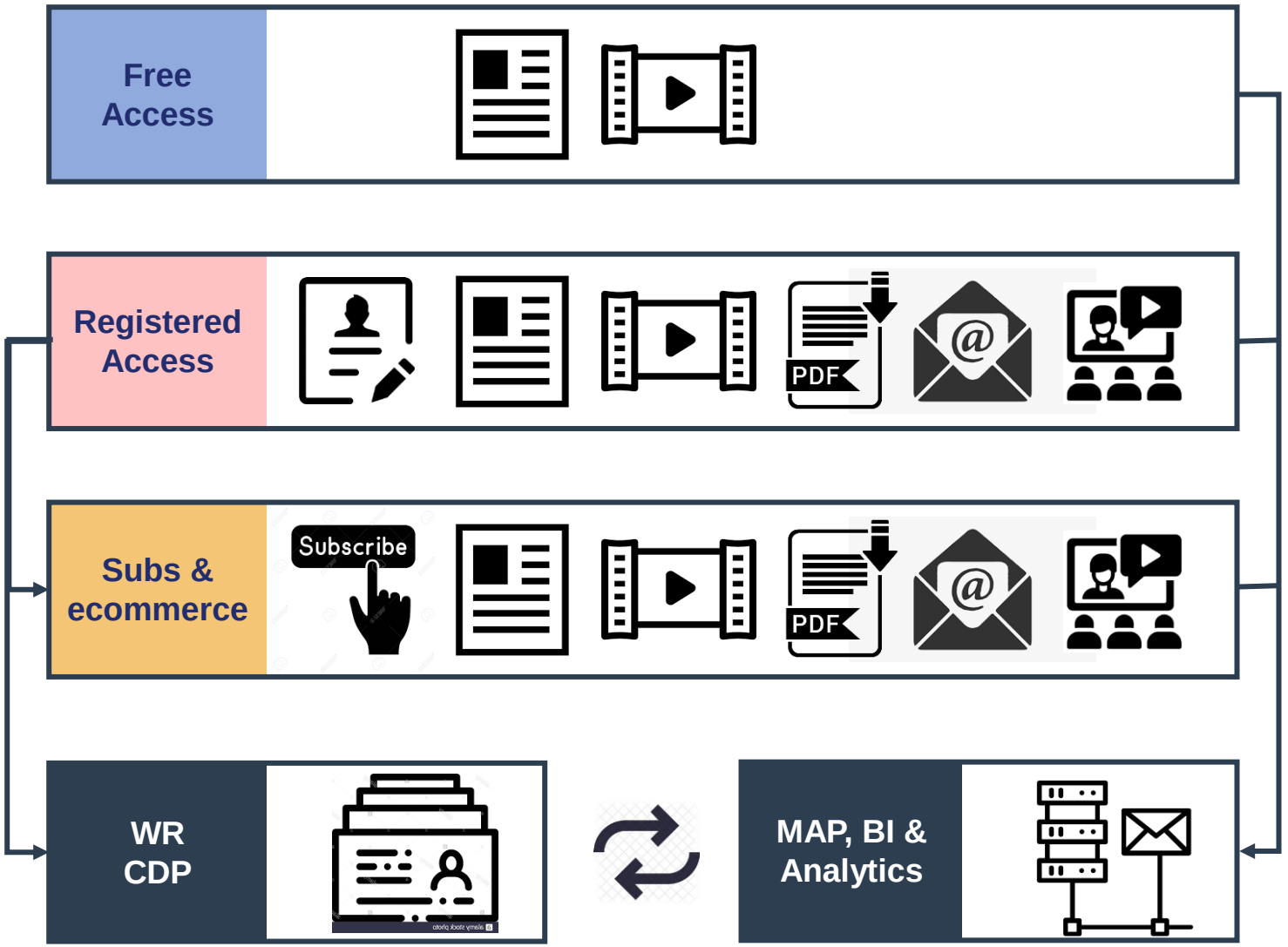
Demographics

- Name
- Job Function
- Seniority
- Industry
- Organisation size
- Region

Interests

- Topic
- Newsletters
- Articles saved/rated
- Votes/questions/polls
- Downloads
- Searches
- Social posts

High level zero and first party data model



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- Social posts

Transactions

- Subs Value
- Lead Value
- Delegate Value
- Awards value
- Average order value
- Lifetime value

What is a user journey? and why is it important?

- A user journey is:

“A person's experience during one session of using a website or application, consisting of the series of actions performed to achieve a particular outcome, mapped to show the steps and choices presented as interactions and the resulting actions.”.

- A user journey can be mapped in order to better understand the flow and make improvements, or it can be designed from scratch based on a desired specification or story.
- Using a user journey map to analyse user behaviour, helps an organisation understand how their customers travel through the entire process and how they feel during their time there.
- This approach provides two major benefits:
  - It allows decision-makers to stay focused on customers and effective outcomes
  - It helps make each step of the experience easier for users
  - It can be linked to KPIs to tune and understand it better

Ultimately it is about putting the customer first

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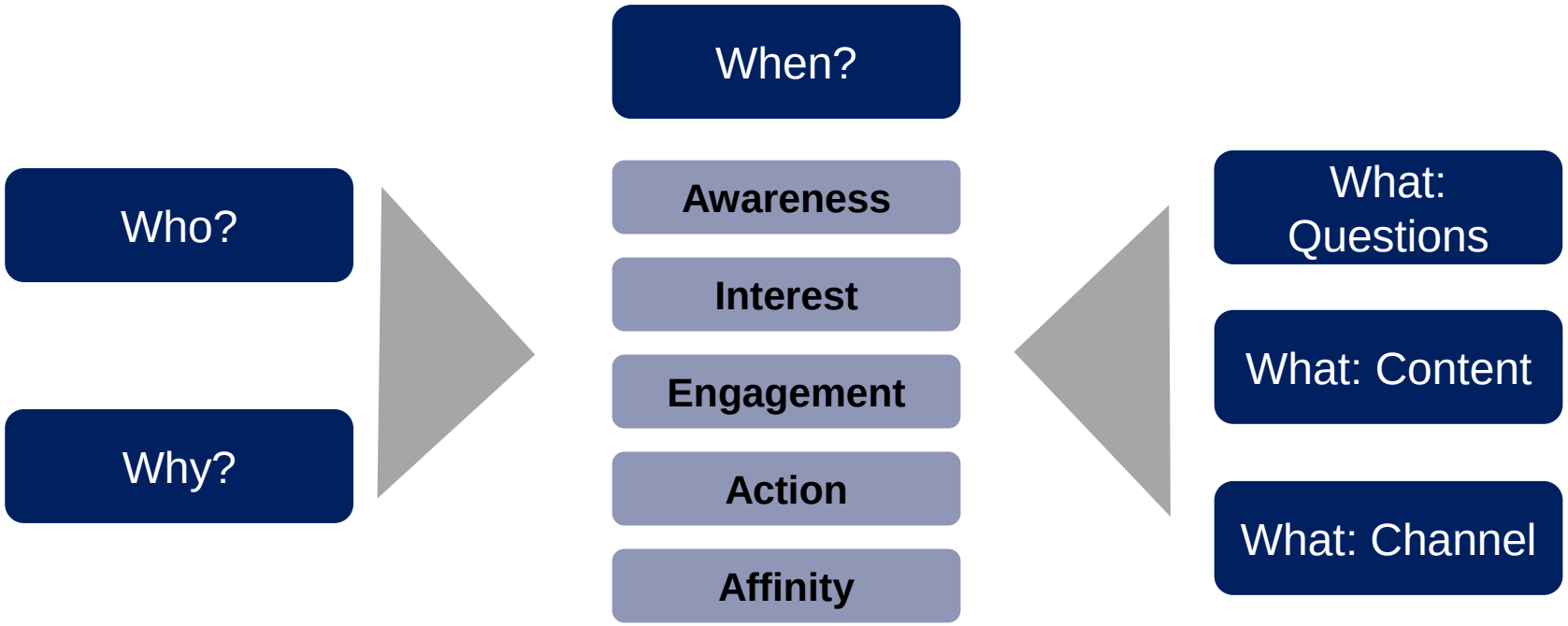
User journey - Who, Why, When and What



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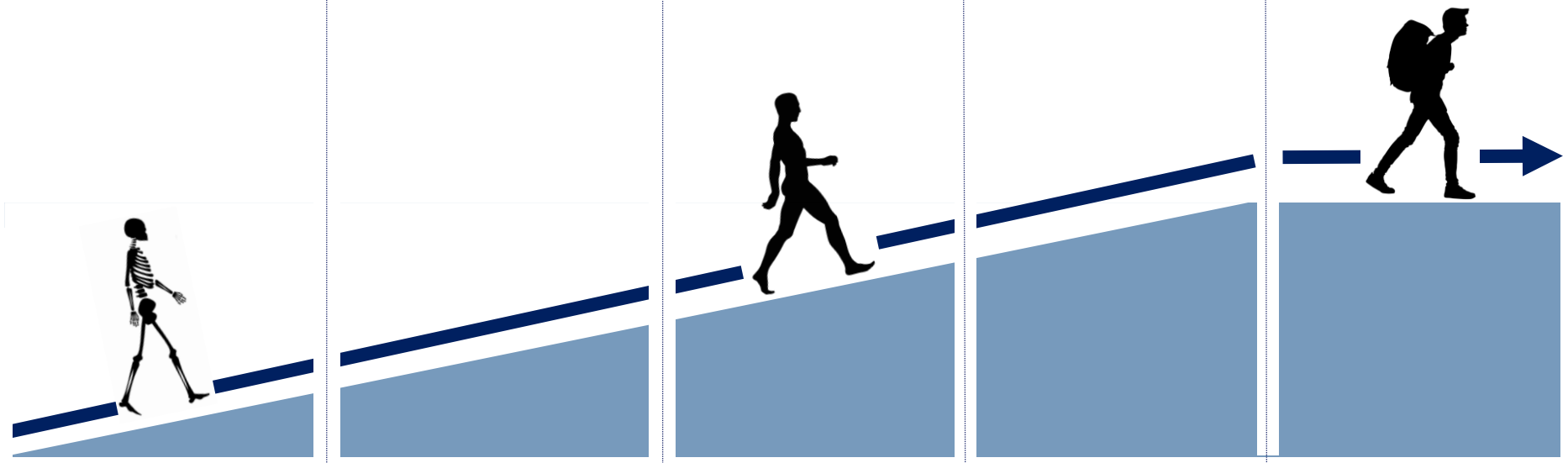
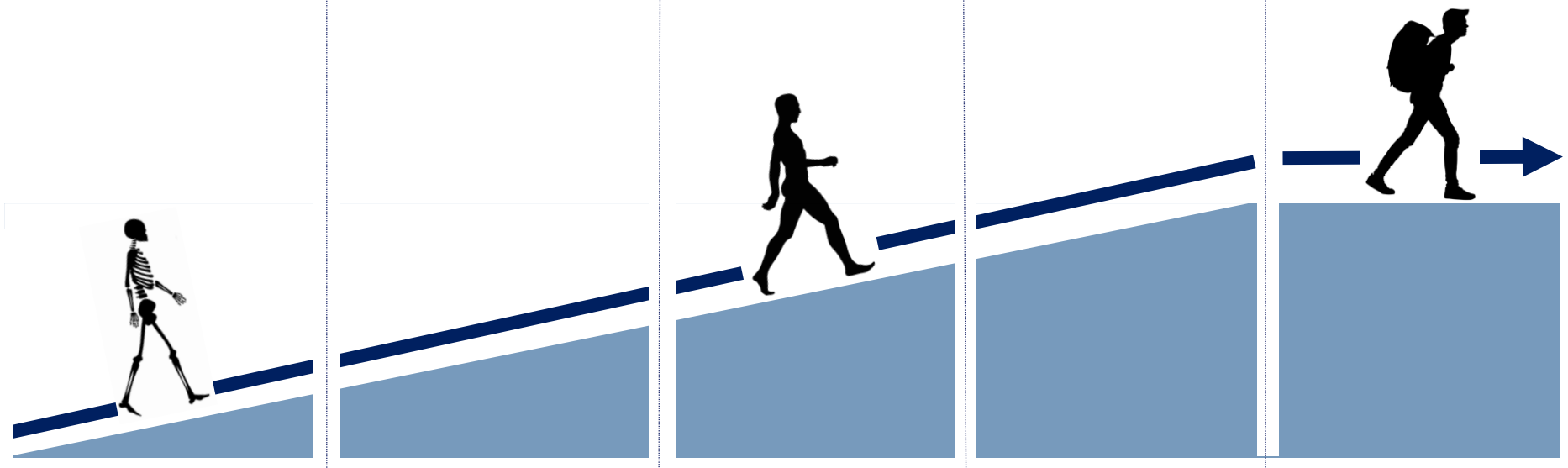
Example user journey – researching theme



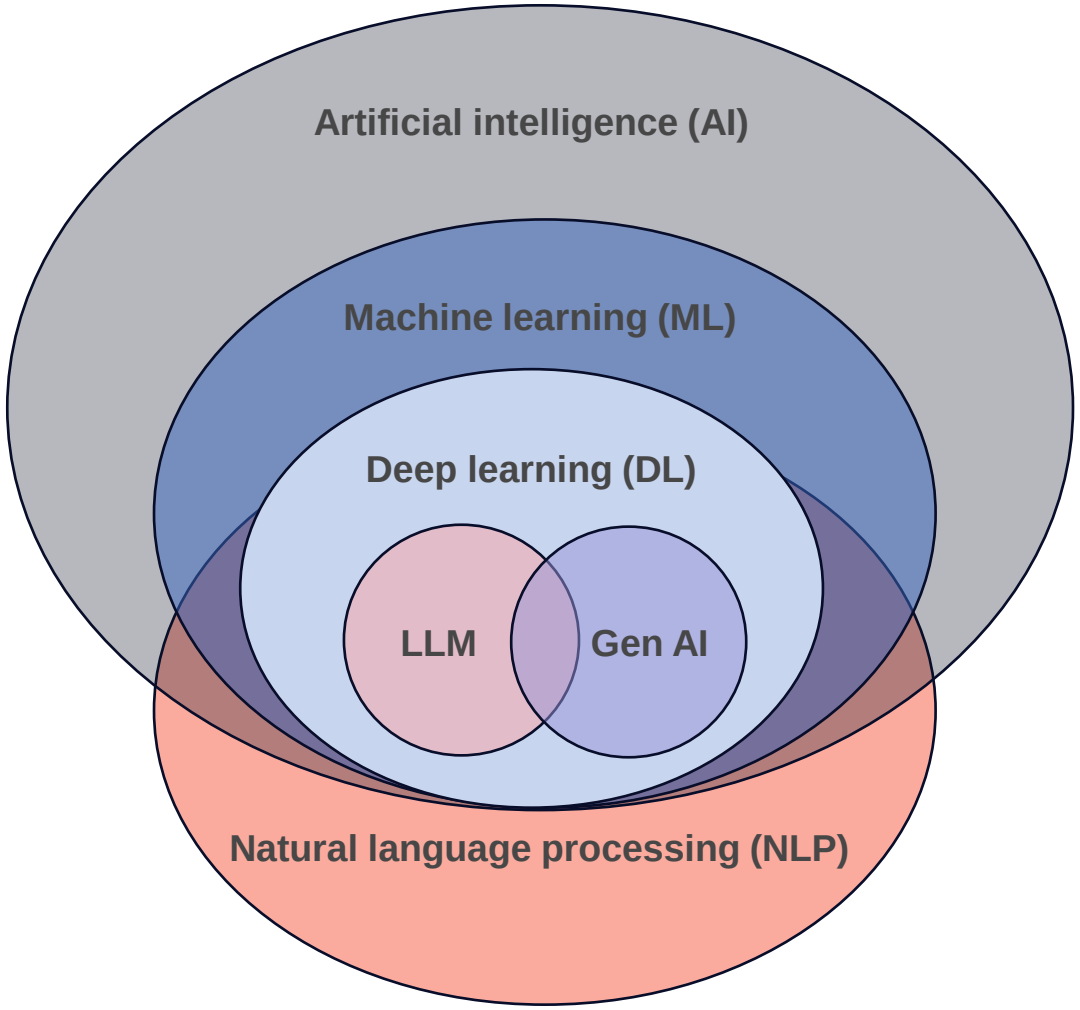
Use cases	Use cases	Use cases	Use cases	Use cases
• User sees ad • User does Google search • User clicks on reports on The Grocer • User sent link from Colleague • Users forwarded email from colleague	• User clicks on latest reports • User browses categories registering for the site and specific category newsletters. • Users uses site search • Users explores editors choice • user explores featured companies/A-Z • User explores more from company/category	• User clicks on sign in and registers • Users clicks on report and registers to download it • User completes registration form and accepts Ts&Cs • User signs up for category newsletters	• User receives newsletter and visits site for specific paper • User logs in • User downloads report • User saves report • User rates report • User accesses my account	• User logs in • User downloads more reports • User saves reports • User rates reports • User accesses my account • User shares reports with colleagues • User shares reports on social media?

Example KPIs – researching theme journey



Awareness	Interest	Engagement	Action	Affinity
User comes across The Grocer through a Google search and visits the site and bookmarks it.	User returns to the site and browses, conducting some searches and reading some precis.	User visits site regularly to explore specific categories. registering for the site and specific category newsletters.	User finds, or is sent, a relevant paper, and downloads it, rates it and saves it.	User is regularly receiving newsletters and downloading and rating papers as a result
KPI # users	KPI # returning visits	KPI # Site Referrals	KPI # user visits	KPI # email opens
KPI # visits	KPI % searches	KPI % returning	KPI % downloads	KPI % email CTR
KPI # search terms	KPI # Paper views	KPI # visits	KPI £ CPL	KPI £ CPL
KPI # live papers	KPI % KPI 8		KPI # Category signups	KPI # ratings

There are many types of Artificial intelligence



Artificial intelligence (AI) is a set of technologies that allow computers to perform tasks that typically require human reasoning, such as learning, planning, and creativity. AI systems can use data to make decisions, solve problems, and adapt their behaviour. They include:

- **Machine learning (ML)** uses algorithms to teach machines to learn from data and improve themselves, without being explicitly programmed to do so. . It has many applications, like customer service: to provide virtual assistance or fraud prevention analysing financial transactions to identify suspicious activity or recommendation engines: grouping customers by buying habit and demographics to make personalised recommendations.
- **Deep learning (DL)** uses artificial neural networks to teach computers to process data and recognise patterns in a way like the human brain, such as: Image classification, Object detection, Natural language processing, and Speech recognition
- **Large language model (LLM)** uses deep learning to analyse and understand text by being pre-trained on large amounts of data, such as books and articles, They use a set of neural networks called a transformer to extract meaning from text and understand the relationships between words and phrases.
- **Generative AI (Gen AI)** refers to the broader concept of AI models that can generate new content. These models are designed to create new content and ideas, like images and videos, based on patterns and examples they have been trained on, and also reuse what it knows to solve new problems.
- **Natural language processing (NLP)** allows computers to understand, interpret, and manipulate human language, it draws from computer text, analyses sentiment, translates languages and responds to communication: examples include: Google Translate, chatbots and speech to text applications:

William Reed's Approach to Generative AI

Overall Ambition:

- William Reed aims to "set an industry standard" and "create trends" in the responsible use of generative AI. We are committed to a balanced approach that combines technological advancement with human expertise, ethical considerations, and a focus on quality content and user experience

Core Objectives and Principles

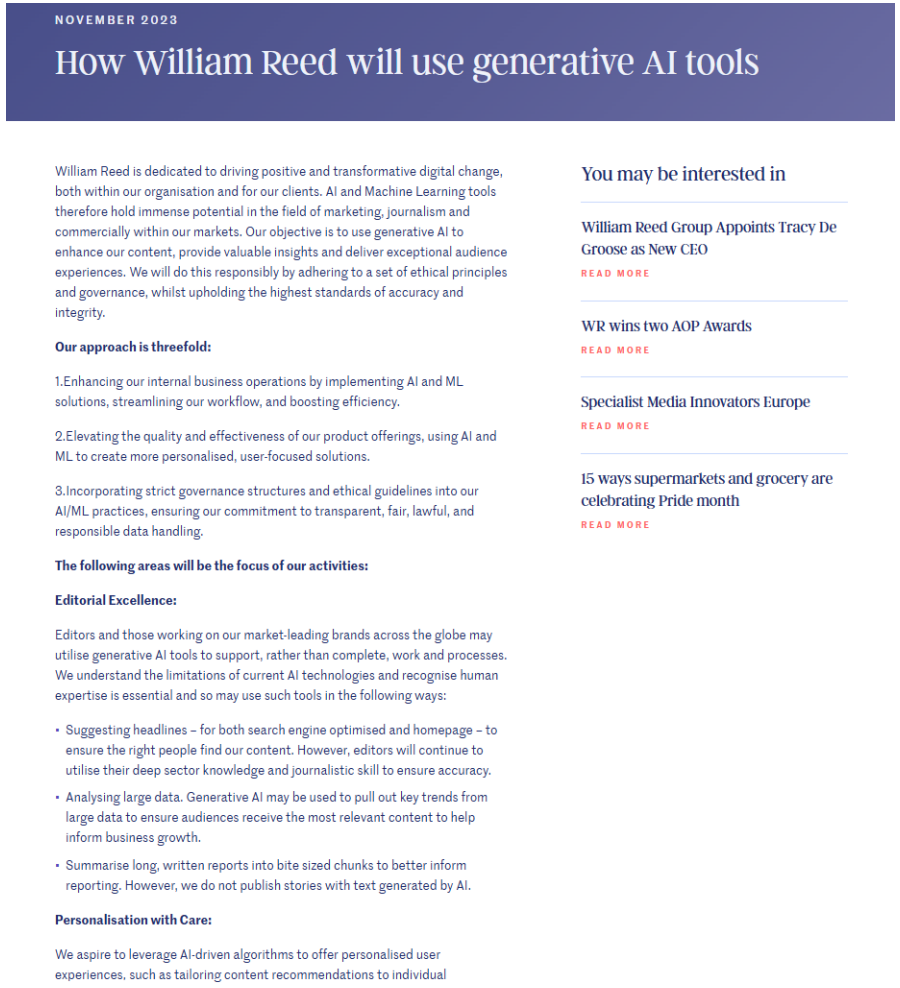
- Enhance internal operations: Streamlining workflows and increasing efficiency.
- Elevate product offerings: Creating personalised and user-focused solutions.
- Maintain ethical and responsible practices: Ensuring transparency, fairness, and lawful data handling.

Governance and Accountability:

- William Reed is committed to rigorous governance over AI use, including:
- Continuous evaluation of AI's impact and adjustment of practices as needed.
- Ensuring appropriate technical, organisational, and contractual measures for lawful data processing.
- Seeking feedback from audiences and stakeholders to ensure transparency and ethical alignment.

Key takeaway:

- "Editors and those working on our market-leading brands across the globe may utilise generative AI tools to support, rather than complete, work and processes."



NOVEMBER 2023

How William Reed will use generative AI tools

William Reed is dedicated to driving positive and transformative digital change, both within our organisation and for our clients. AI and Machine Learning tools therefore hold immense potential in the field of marketing, journalism and commercially within our markets. Our objective is to use generative AI to enhance our content, provide valuable insights and deliver exceptional audience experiences. We will do this responsibly by adhering to a set of ethical principles and governance, whilst upholding the highest standards of accuracy and integrity.

Our approach is threefold:

1.Enhancing our internal business operations by implementing AI and ML solutions, streamlining our workflow, and boosting efficiency.

2.Elevating the quality and effectiveness of our product offerings, using AI and ML to create more personalised, user-focused solutions.

3.Incorporating strict governance structures and ethical guidelines into our AI/ML practices, ensuring our commitment to transparent, fair, lawful, and responsible data handling.

The following areas will be the focus of our activities:

Editorial Excellence:

Editors and those working on our market-leading brands across the globe may utilise generative AI tools to support, rather than complete, work and processes. We understand the limitations of current AI technologies and recognise human expertise is essential and so may use such tools in the following ways:

- Suggesting headlines – for both search engine optimised and homepage – to ensure the right people find our content. However, editors will continue to utilise their deep sector knowledge and journalistic skill to ensure accuracy.
- Analysing large data. Generative AI may be used to pull out key trends from large data to ensure audiences receive the most relevant content to help inform business growth.
- Summarise long, written reports into bite sized chunks to better inform reporting. However, we do not publish stories with text generated by AI.

Personalisation with Care:

We aspire to leverage AI-driven algorithms to offer personalised user experiences, such as tailoring content recommendations to individual

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How William Reed will use generative AI tools published in November 2023

William Reed's Gen AI focus areas

Editorial Excellence:

- AI tools will **support, not replace** human expertise in editorial processes
- Use cases include: Headline suggestion for SEO and homepage optimisation
- Analysing large datasets to identify key trends
- Summarising lengthy reports
- Crucially, AI-generated text will not be published

Personalisation with Care:

- AI algorithms will be used to personalise user experiences, such as content recommendations
- User privacy and transparency are prioritised, with clear disclosure when AI-generated content is used

Thoughtful Idea Generation:

- AI will be explored for generating story ideas and short-form content
- Final editorial decisions will always be made by human teams, ensuring quality standards are met

Research and Analysis:

- AI will be used as a tool for research and analysis, helping reporters extract insights from large datasets
- Fact-checking, original reporting, and verification from primary sources remain paramount

Ethical Image Generation:

- AI-generated images and videos will be used under specific conditions:
    1. Significant creative input from artists is required
    2. Unlawful imitation and copyright infringement will be avoided
    3. Fair compensation for creators by AI companies is a key concern

What questions should you be asking in 2025:

1. How can we adapt to the ongoing challenges in media, such as rising costs, declining advertising revenue, and slowing subscription growth?
2. How can we mitigate the decline in referral traffic from social media sites, and the threat of generative search experiences with alternative strategies for reaching audiences?
3. How far should we be embracing non text formats such as podcasts, shortform video newsletters and bots, and make them more central to monetize content effectively?
4. How can we diversify revenue streams and adapt to changing business models, such as exploring digital subscriptions, bundling non-news content, and considering licensing deals with AI platforms?
5. How can we leverage AI and new technologies effectively for back-end automation, better recommendations, and commercial uses, while considering reputational risks and ethical implications?
6. How can we adapt to platform-specific changes and developments on major tech platforms like Google, X, Meta and linkedin, and leverage new features and functionalities?
7. How can we adapt to changing audience preferences and behaviours, such as short-form video content, optimised content for search engines, and building communities on messaging apps?
8. How can we foster innovation and adaptability within our organisation?

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Ends

Generative AI can pose a number of risks

- **Bias and discrimination:** AI algorithms are only as unbiased as the data they are trained on. Biased data can lead to biased algorithms, which can trigger costly errors.
- **Cybersecurity:** Generative AI models require a lot of data, and many organizations use "black box" models, which means they're unsure how the system uses the information. Cyber attackers can intentionally generate inappropriate output by entering crafted prompts.
- **Misuse:** Generative AI models can be misused to create deepfake avatars or fake content to deceive users.
- **Copyright issues:** Generative AI models are trained on large amounts of internet data, which can include works that have not been explicitly shared. This can lead to copyright infringement.
- **Hallucinations:** Generative AI models can produce unrealistic outputs or "hallucinations". This can happen if the training data is noisy or contains mistakes.
- **Intellectual property risks:** It's not clear who owns the intellectual property (IP) generated by AI. The material fed into the AI may also be protected by rightsholders.
- **Compliance:** Generative AI models may not always meet compliance requirements, which can expose companies to legal risks

Some examples of generative AI hallucinations

AI hallucinations can be problematic because they can lead to the spread of disinformation, harm decision-making processes, and generate offensive or biased content.

- **Incorrect predictions** An AI model may predict an event that is unlikely to happen, such as rain when there is no forecast.
- **False positives** An AI model may identify something as a threat when it is not, such as flagging a transaction as fraudulent when it is not.
- **False negatives** An AI model may fail to identify something as a threat when it is, such as failing to identify a cancerous tumor.
- **Fabricated information** An AI model may fabricate information and present it as truth. For example, a chatbot may provide an answer that is factually inaccurate.
- **Nonsensical output** An AI model may provide output that is nonsensical. For example, an AI model may provide five examples of bicycle models that will fit in the back of a specific make of sport utility vehicle when only three models exist.
- An example of this would be an AI model designed to generate summaries of news articles may produce a summary that includes details not present in the original article, or even fabricates information entirely.

This is why we need to train generative AI LLMs with our own content to minimise this risk

Role of technology in marketing automation

- Technology allows media owners to interact with customers, talk to them, and engage them more than ever. We can have one to one conversations and give customers a more personalised experience in multiple ways and with many devices.
- The basic role of technology boils down to helping marketers get a better grasp on customer preferences, their behaviour and purchase trends, through the collection of data and to design the most effective marketing strategy based on this intelligence.
- If marketing is really about designing and delivering effective and profitable customer experiences, software is the building block for customer-centric marketing strategies. Software, tools, and new technologies help marketers devise new ways to engage customers.
- However, we must not downplay these new streams of marketing, because if effective marketing is the aim, it is essential that organisations realises that technology doesn't have a little bit to do with marketing, **it is marketing.**

Where should you focus budgets?

- Develop a simple, understandable strategy: defining business goals, KPIs and target market that can be shared with, and owned by your team
- Create a SMART roadmap that outlines how technology can support this strategy and drive growth
- Set a budget for technology to this deliver strategy, with clear ROI goals and ruthlessly stick to it
- Prioritise big impact areas for any tech investments and buy monthly subs where possible
- Implement Cloud-Based Solutions where you can for areas such as data storage, collaboration tools, and software applications. Cloud solutions offer flexibility, scalability, and cost-effectiveness.
- Look to fractional roles to fill in expertise gaps for short term improvements
- Utilise free to air analytics tools to gain insights into your customer behaviour, and market trends.
- Utilise digital marketing channels, such as social media, email marketing, and search engine optimisation (SEO), to reach and engage with your target audience.
- Implement tools and platforms that facilitate collaboration and communication among your team members. This can include project management software, video conferencing tools, and instant messaging platforms.
- Focus on delivering exceptional customer experiences by leveraging technology. Implement customer relationship management (CRM) systems, personalised communication channels, and self-service options to enhance customer satisfaction and loyalty.
- Continuously monitor industry trends and technological advancements. Be open to adopting new tools and strategies that can improve your business processes and keep you ahead of the competition. Embrace a culture of learning and adaptability.

What investment should go into your tech stack?

Insights from the EY-Parthenon Digital Investment Index (DII) report (April 2022) provides valuable information about the current state of digital transformation and investment strategies across industries.

- According to the DII report, companies are making significant investments in digital transformation, with a 65% increase from 2020 to 2022
- Companies are allocated 5.8% of their revenues to digital technologies in 2022, up from 3.5% in the previous survey (no data for 2023)
- The report indicates that more companies are measuring returns on digital investments, with 41% of companies now measuring returns in 2022 compared to 23% in 2020
- A clear digital strategy, business case, and agile capabilities are crucial for securing the right level of funding. Only 16% of respondents strongly agreed that they have a clearly defined digital strategy
- Improving customer experience remains a top priority for companies, with 42% of executives identifying it as a key goal for the next two years 2022 - 2024
- Companies are leveraging first party data to enhance predictive models and personalisation

Cost effective tools for all budgets

- Microsoft 365 - collaborate directly on the same set of documents - Microsoft 365 Review
- Google Workspace - Google's answer to Microsoft 365 - Google Workspace Review
- Slack - Team collaboration - Slack Review
- Miro - bridges gap between office working and the modern hybrid routine - Miro Review
- Asana - easy way for companies to track the work of employees - Asana Review
- Trello - easy project management - Trello Review
- Flock - A communication-focused Slack alternative - Flock Review
- InVision - Built for designers - InVision Review
- Microsoft Clarity - a free tool that captures how users use your website - Clarity website
- Hubspot - cost effective CRM platform - Hubspot website
- GAM small business - free, ready-to-use business advertising solutions – GAMSB Website
- Basecamp - Refreshingly simple project management - Basecamp Website
- Monday.com - manage everything from strategy to tasks - Monday.com Website