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Metadata and Taxonomies for Artificial Intelligence, Personalization and eCommerce

Jack Aaronson

CEO – The Aaronson Group

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Who Are We?

- The Aaronson Group is focused on building customer loyalty and satisfaction through personalized multi-channel marketing and user experiences
- Write bi-weekly CRM/Customer Loyalty column at ClickZ.com (75+ articles) and in addition to my own newsletter
- Conference topics include: Personalization Best Practices, Email Retention Strategies, Multi-Channel Marketing Best Practices, and Customer Loyalty Strategies
- Academic: World Congress of Mass Customization & Personalization (Germany), Adaptive Hypermedia Association, Contextual Web Group (AKT, Southampton), Wharton School of Business, U. of Malaga, U. of Southampton, Columbia Business School, Stern School of Management, University of Munich, etc...
- Artificial Intelligence Software Architect/Engineer; Solutions Architect (Financial Consulting Company); 3 years as Director of Personalization at Barnes&Noble.com

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Some of our clients











STROUD & SWINDON ... looking after you personally

User-centric Experiences

- Can/should use three different type of knowledge
 - Deep knowledge of your products/services/content
 - Deep knowledge of your users
 - Ability to connect two knowledge bases in some meaningful way
- Different types of projects can be built based on any combination of these groups of knowledge

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Case Studies



JEWELRY WATCHES HOUSE & HOME

COMPUTERS

BEAUTY

HEALTH & FITNESS

NBC UNIVERSAL ITEMS

MORE

Auctions

Broadcast Center

TV Schedule

Week in Review

Meet Our Hosts | Special Collections

Clearance

Sign Out O Good afternoon

JACK

SEARCH

Account Information Buyer's Guide

Customer Service





- () Watch ShopNBC TV
- Week in Review
- TV Schedule
- (Find ShopNBC TV



TODAY INSIDE ShopNBC.com

Aug 24, 2004

- · Select Van Belinger jewelry only online
- . Save \$100 on a Proform Treadmill!
- · Shop fashionable new outerwear for Fall
- . Shop a huge array of rings for Fall fashion!
- · Official Team USA Olympic Roots gear!

DEPARTMENTS

Apparel/ Accessories Beauty Bridal/ Anniversary Clearance Computers/ Software

Electronics Gourmet Food

Health & Fitness House & Home

Jewelry

Movies

NBC Universal Items Special Collections Sports Merchandise

FEATURED SHOPS

Watches

Auctions

Birthstones

New Arrivals

Just Aired Items

Clearance

OUR TOP VALUE



Eureka 5740A Whirlwind Litespeed Bagless Genesis Upright Vacuum Retail Value: \$119.99 Sale Price: \$80.23

Price Good Today Only O

ON AIR NOW



18K Diamond Zipper Rina

Retail Value: \$2411.00 ShopNBC: \$1299.99

Tell Me More ()

JUST AIRED



14K Gemstone & Diamond Flower Earrings

Retail Value: \$740.00

Sale Price: \$349.98

Tell Me More ()

NBC UNIVERSAL



The Apprentice: Season One DVD Retail Value: \$59.98 ShopNBC: \$39.98

Plus 100's of Other NBC Universal Items ()

ShopNBC CREDIT CARD



NO PAYMENTS'

90 Days on Fitness Machines & Mattresses 365 Days on Computers

*Subject to credit approval

Learn More O

FEATURED PRODUCTS



NEW WALL ART

Dozens of Prints In Styles to Suit Every Taste

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Value

Lowest Price of the Season on a New Item Each Day.

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Body Jewelry **Express Yourself**



JEWELRY

Find an unrivaled spectrum of styles, stones, metals, and prices to fit every preference and occasion.

All Departments

JEWELRY Anklets Body Jewelry Bracelets Coin Jewelry Diamond Basics

Earrings

Jewelry Boxes/

Cleaning Kits

Loose Stones

Men's Jewelry

Personalized Jewelry Pins/Pendants/Slides

Necklaces

Shop Now D

You Are Here: ShopNBC Home > Jewelry

TODAY'S HOT BUYS FOR JEWELRY



14K WG Round & **Baguette Cut Diamond** Ring

Retail Value: \$1607.00 Sale Price: \$799.95 Tell Me More ()



18K White Gold Oval Ring

Retail Value: \$535.00 ShopNBC: \$199.98

Tell Me More ()



SS/Rhodium Signity® Star Cubic Zirconia Ring & Earrings Set Retail Value: \$109.00

ShopNBC: \$79.99

Tell Me More ()





14K Polished Special Clip

Retail Value: \$45.00 ShopNBC: \$19.99

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Rings View All Items

Buyer's Guide Learn about jewelry care & alamina



Sterling Silver Oval

Link Snake Design



Diamond Earrings



14K WG, RG or YG 6.5mm Signity® Star



14K 1.00ct Diamond Hoop Earrings



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Body Jewelry **Express Yourself**



JEWELRY

Find an unrivaled spectrum of styles, stones, metals, and prices to fit every preference and occasion.

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You Are Here: ShopNBC Home > Jewelry > Rings

All Departments

RINGS

Created/Simulated Diamonds Fashion/Costume Gemstones Gold

Moissanite Platinum

Silver

View All Items

O Back

Buyer's Guide Determine Your Ring Size

TODAY'S HOT BUYS FOR RINGS



14K TT Three-Row Diamond Row Ring Retail Value: \$385.00 ShopNBC: \$249.98 Tell Me More ()



14K White Gold Diamond Accent **Dangling Heart Ring** Retail Value: \$435.00 ShopNBC: \$179.98

Tell Me More ()



SS/Rhodium Signity® Star Cubic Zirconia Ring & Earrings Set Retail Value: \$109.00

ShopNBC: \$79.99 Tell Me More ()



View All Items

Sterling Silver/Rhodium Princess Cubic Zirconia Eternity Band Retail Value: \$44.00 Clearance: \$19.99



Sterling Silver Gemstone Ring



Sterling Silver Multi-Gemstone Ring



SS/Rhodium Signity® Channel Set Eternity



Tell Me More ()

14K Band Ring Retail Value: \$105.00



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Buyer's Guide Check out our Guide to Diamonds

You Are Here: ShopNBC Home > Jewelry > Rings > Diamonds

COMPARE SELECTED ITEMS

1 - 32 of 452 products displayed 12345 | Next Page >

Sort By: Price: High-Low





14K WG Men's Screw Top Diamond Ring J124892

Retail Value: \$12894.00 ShopNBC: \$6499.98

Tell Me More ()

QUICK BUY ADD TO CART

Compare Selected Items

14K WG or YG Round Center w/ Sides 2.03cttw **Engagement Ring** V23825 Retail Value: \$12512.00

Products shown per page: 8 | 16 | 32

ShopNBC: \$6399.00

See It in 3D

Tell Me More ()

ADD TO CART QUICK BUY

Compare Selected Items



14K WG or YG Cathedral

2.00cttw Diamond **Engagement & Wedding Set**

V23813

Retail Value: \$12250.00 ShopNBC: \$6249.00

See It in 3D

Tell Me More ()

ADD TO CART QUICK BUY

Compare Selected Items

14K WG or YG Antique Style 1.72cttw Engagement & Wedding Set



14K WG or YG Round & Princess 1.67cttw Diamond **Engagement Ring** V23821

Retail Value: \$11515.00 ShopNBC: \$5895.00

See It in 3D

Tell Me More ()

ADD TO CART QUICK BUY

Compare Selected Items

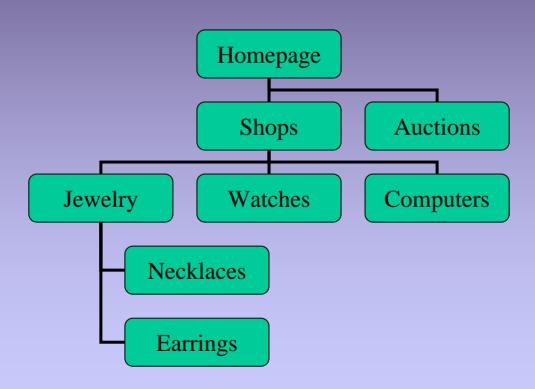
Sample Photo* 14K WG or YG Round & Princess 1.32cttw Cathedral Engagement Ring

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Typical Site Wireframe

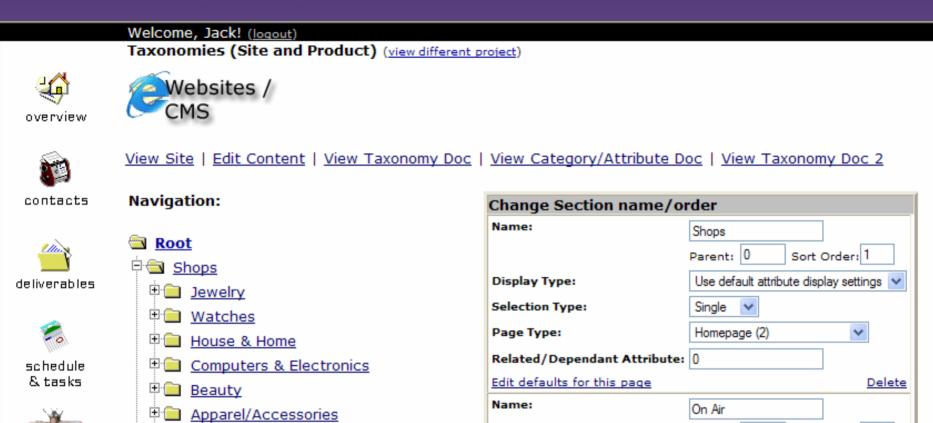
Logo – targeted for each segment			
Lifestyle photo		Promo box #1	
Promo box #2:	Promo box #3:		Call to actions
Copyright 2004 ABC Company <u>Privacy Policy</u> <u>Contact Us</u>			

Typical Information Architecture



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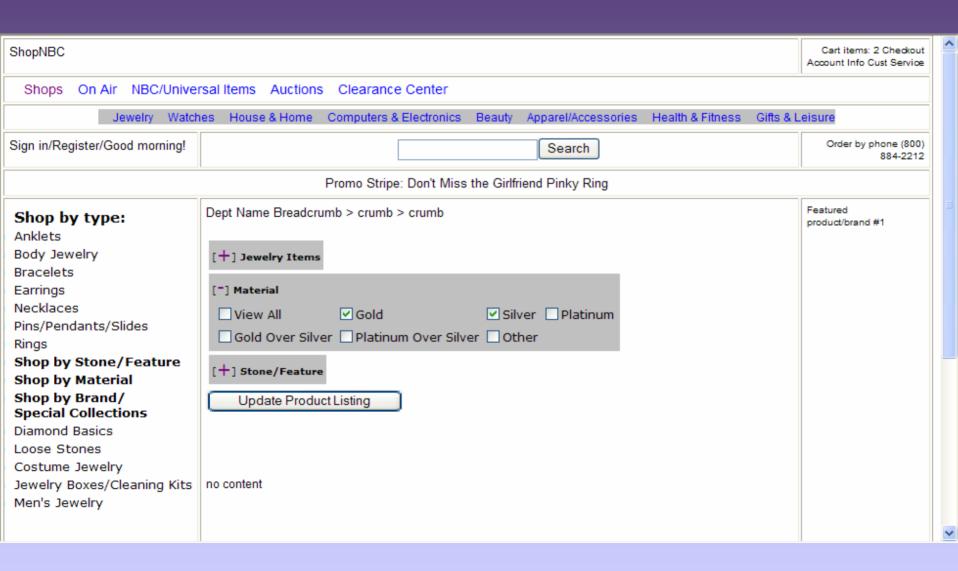
in 🥽 - Line letter of the contract

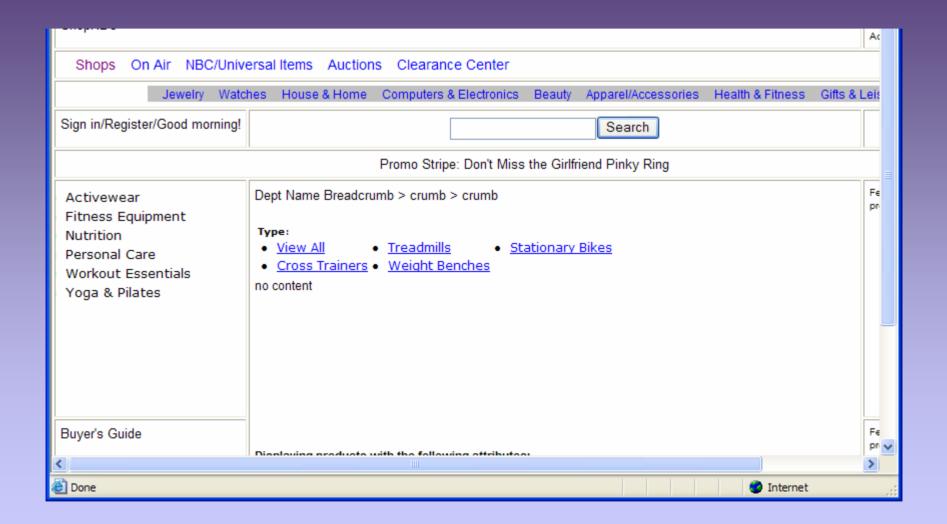


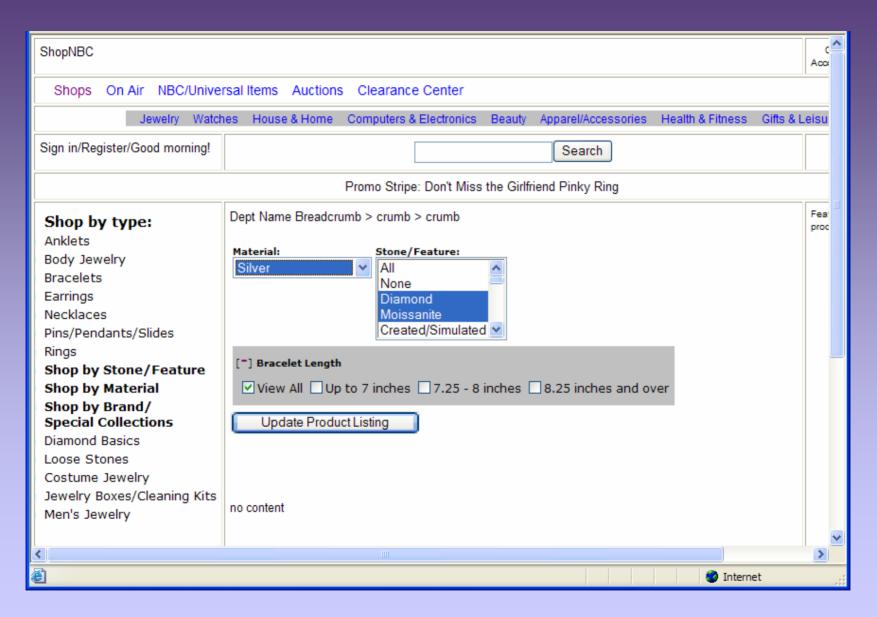
Sort Order: 2

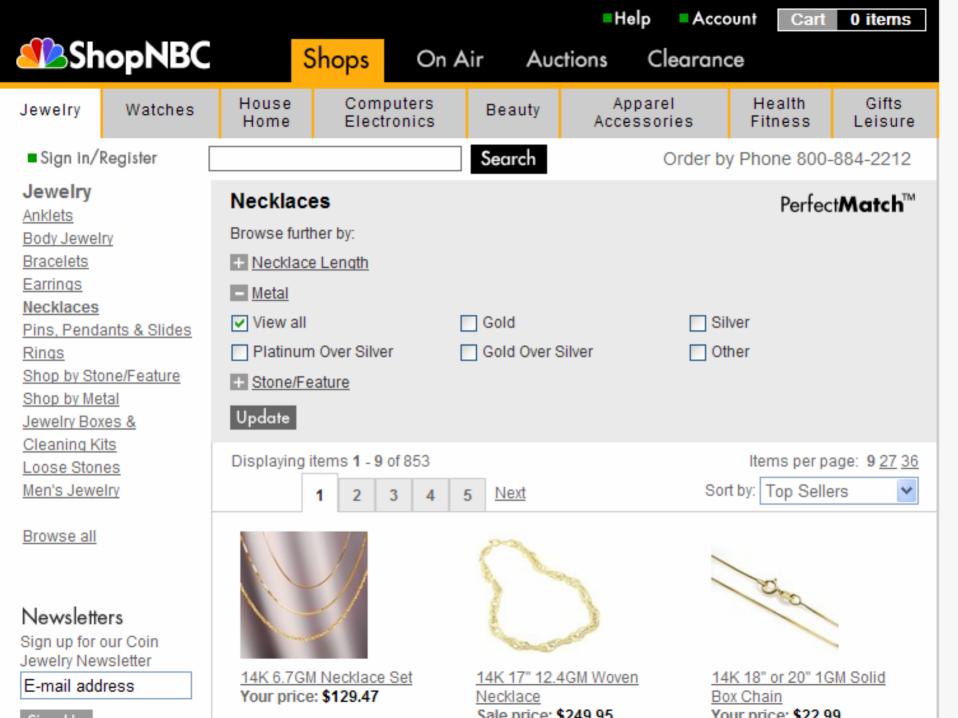
Parent: 0

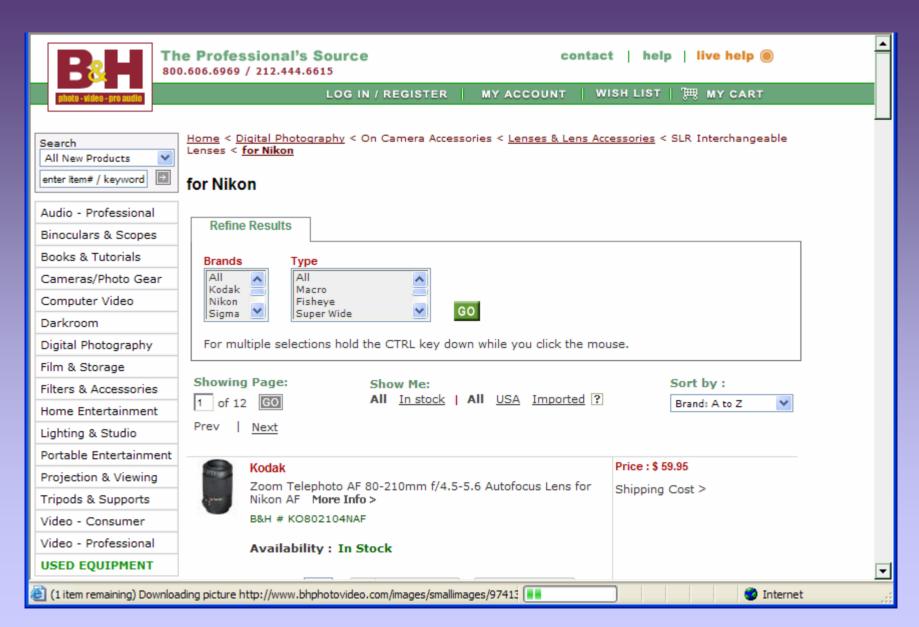




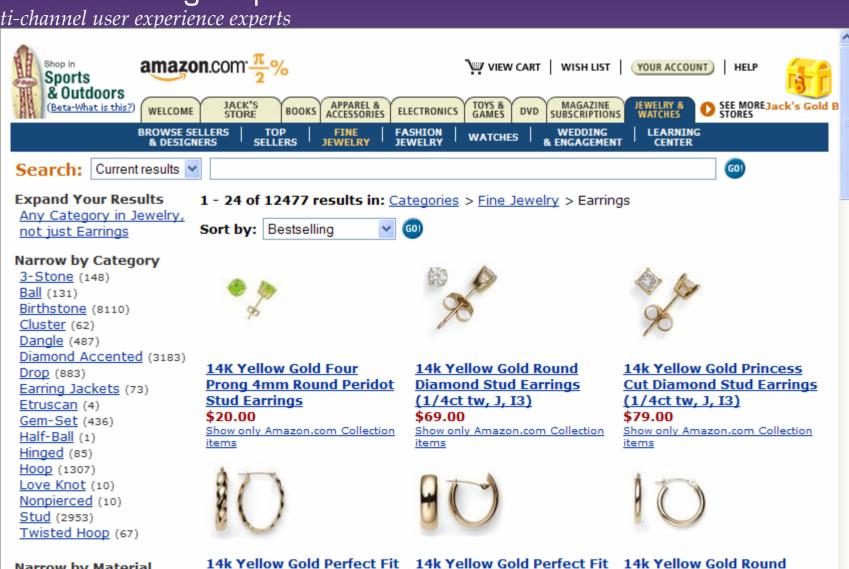








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Narrow by Material

Jade (40)

Mother Of Pearl (26)

amethyst (322)

aquamarine (233)

bead (21) letone and define and Show only Amazon.com Collection items

Earrings

\$35.00

Earrings \$45.00

160

Show only Amazon.com Collection items

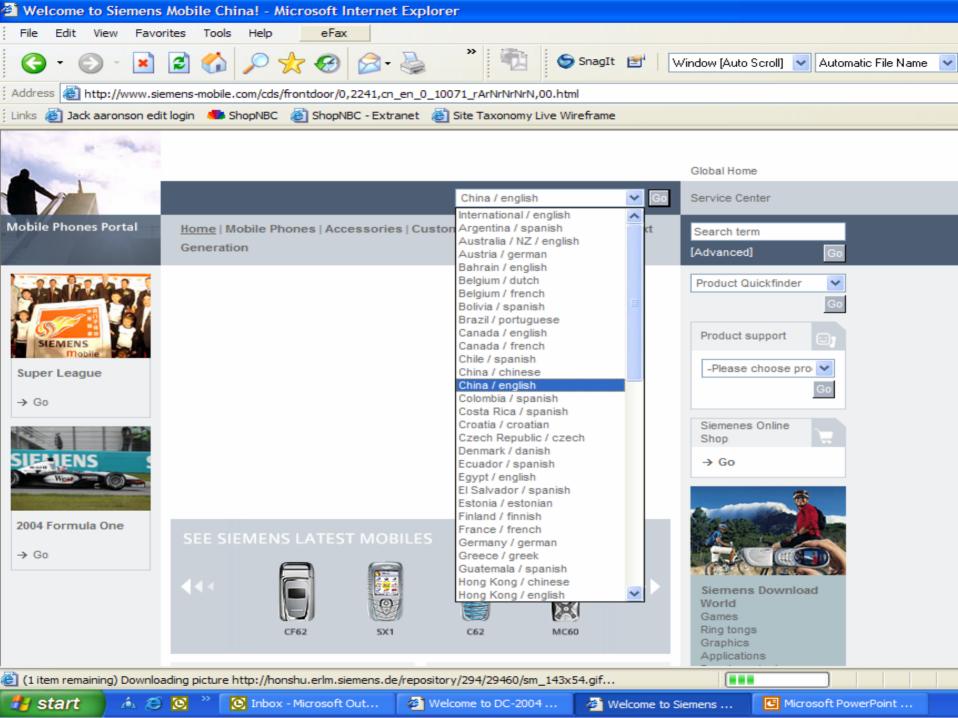
Hoop Earrings \$20.00

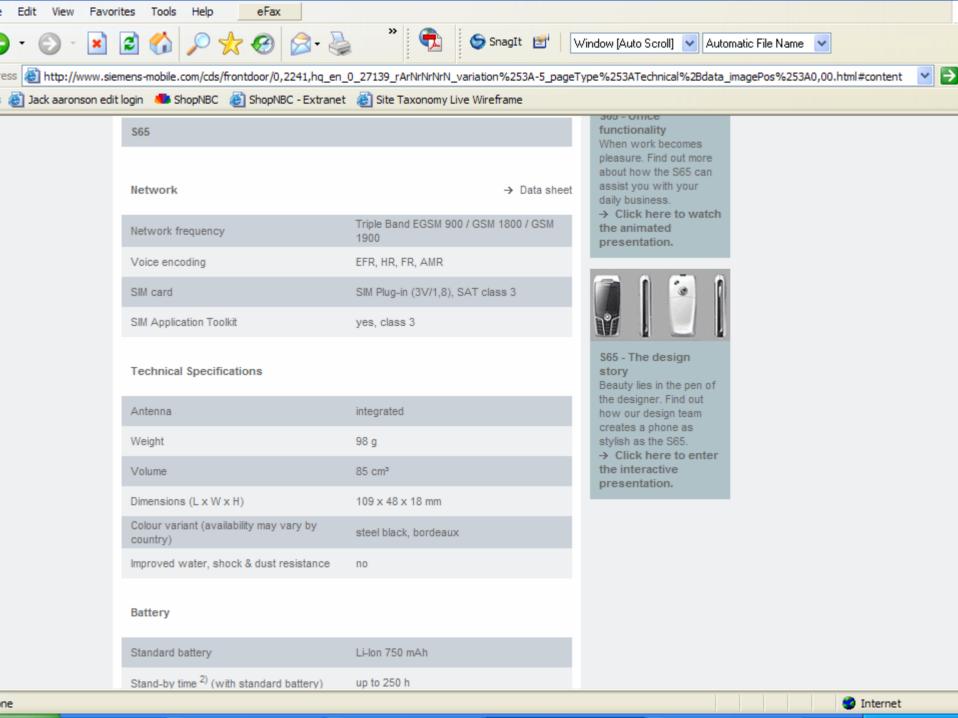
Show only Amazon.com Collection

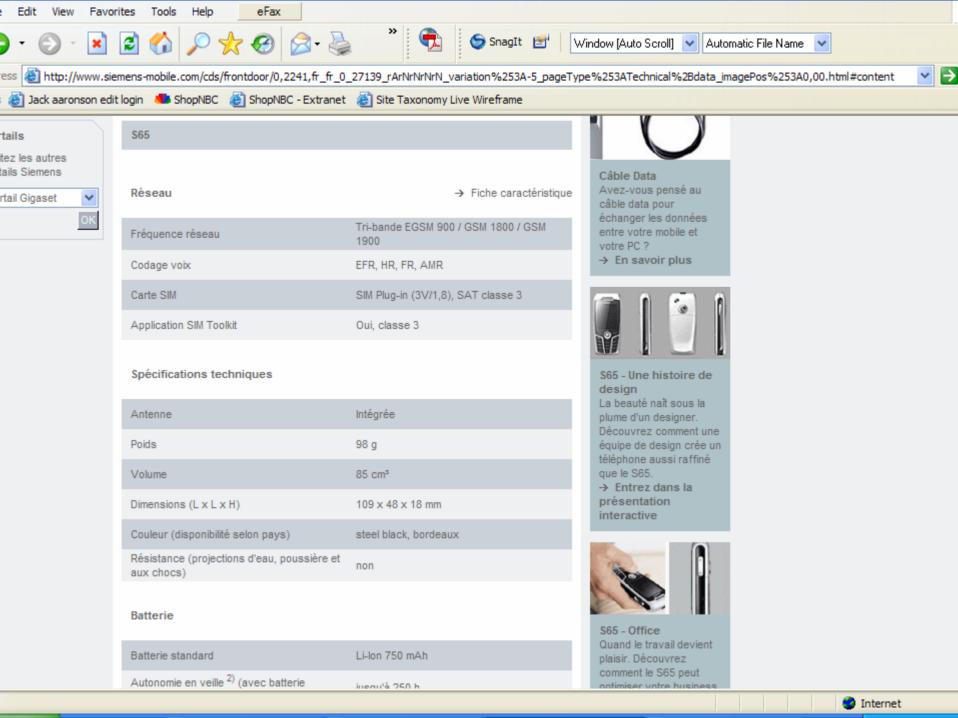
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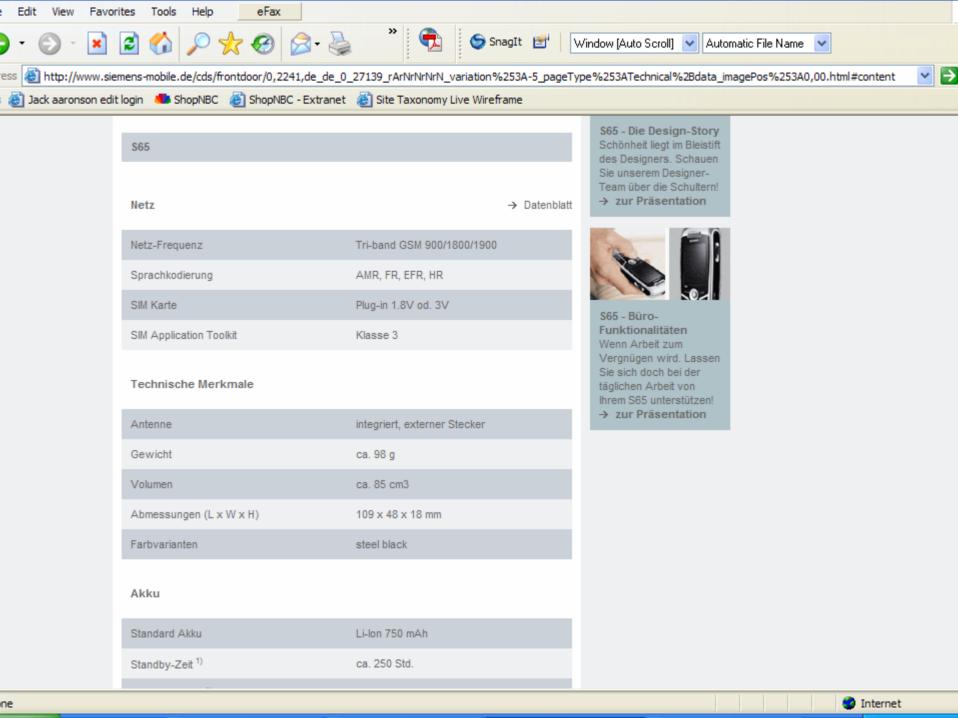
Multi-lingual Universes

Meta-data separates **display** from **internal** nomenclature









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Metadata, Artificial Intelligence and Personalization

Metadata-based personalization answers the question "why?" and not "what?"

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Metadata

- Understand why someone is shopping, not just what they are shopping for
- Recommend products and services based on their needs, not on their history
- Let's look at an example...

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Metadata Example

A Tale of Two Book buyers

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Book 1

The Civil War



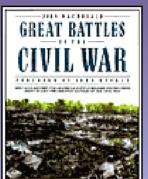
History

United States

Civil War

Book 2

Great Battles of the Civil War



History

United States

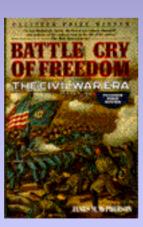
Civil War

Campaigns

Battlefields

Book 3

Battle Cry of Freedom



History

United States

Civil War

Campaigns

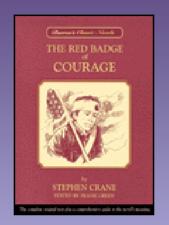
Children

www.aaronsongroup.com

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Person #1

The Red Badge Book 4 of Courage

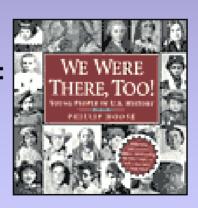


History Juvenile Drama United States

Children Civil War Virginia

Book 5

We Were There, Too!: Young People in U.S. History



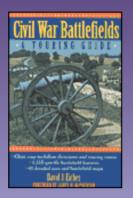
History United States Youth

Children

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Person #2

Book 4 Civil War Battlefields



History

United States

Civil War

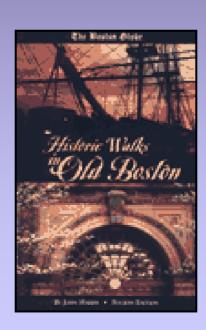
Guidebooks

Battlefields

Historic Sites

Book 5

Historic Walks in Old Boston



Guidebooks

Boston

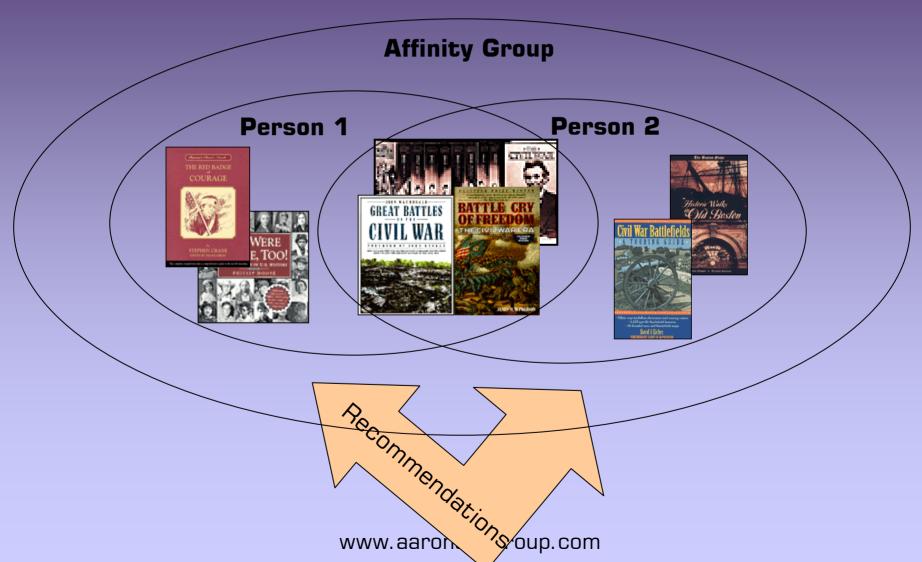
Massachusetts

Walking

Tours

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In a statistical world...



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In a world of metadata...

- Person 1
 - History (5)
 - United States (5)
 - Civil War (4)
 - Children (3)
 - Campaigns (2)
 - Youth
 - Virginia
 - Juvenile Drama

- Person 2
 - History (4)
 - United States (4)
 - Civil War (4)
 - Campaigns (2)
 - Guidebooks (2)
 - Battlefields (2)
 - Historic Sites
 - Walking
 - Tours
 - Boston
 - Massachusetts
 - Children



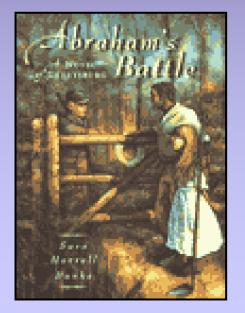
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Recommendations

Person #1



Abraham's Battle: A Novel of Gettysburg



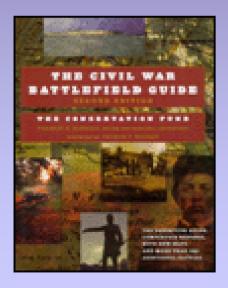
In 1863, as the Civil War approaches his home in Gettysburg and he realizes that a big battle is about to begin, a freed slave named Abraham decides to join the ambulance corps of the Union Army.

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Recommendations



Person #2



The Civil War Battlefield Guide

Definitively depicting the 55 major battlefields of the Civil War, this complete guide describes each battle vividly in an essay by a distinguished historian. Color photographs show the battlefields as they are today, while detailed maps plot the movements of the armies as well as the topography of the land.

For more information

- Articles at AaronsonGroup.com or ClickZ.com:
 - Meta-data and Personalized Shopping and Gift Advisors
 - Meta-data to drive Configurators
 - User-centric Meta-data for connecting people and products
 - Product Meta-data to Simply Product Categories
 - Meta-data for multi-lingual applications
 - Needs-based (user-centric) browsing and searching
 - Unifying customer view over multiple channels
- Other projects we have done or are working on:
 - Meta-data driven visual gift advisors
 - Meta-data driven site syndication

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Thank you!

Jack Aaronson jack@aaronsongroup.com