



**Invitation to a CDP Data Party
Interview with John Challice, Hum**

**For podcast release
Monday, March 6, 2023**

KENNEALLY: What do you bring to a data party for publishers? If the guest list is scientists and scholarly researchers, then a customer data platform might be just the thing.

Welcome to CCC's podcast series. I'm Christopher Kenneally for Velocity of Content. For publishers, the perfect data party is where you can remember everyone's name – what they do, what they like, and what content they engage with. A customer data platform, or CDP, collects customer data into a single place, making it easier for STM publishers to attract and retain readers, recruit new authors and reviewers, and target offers for newsletters, services, and products.

John Challice is senior vice president of business development with Hum, a self-styled next-gen CDP built expressly for scholarly publishers and mission-based member organizations. For that data party, John can produce a golden record with a really winning beat.

John Challice joins me now. Welcome to the program.

CHALLICE: Thank you, Chris. It's delightful to be here.

KENNEALLY: We're looking forward to speaking with you about this new take on data. Every day, 2.5 quintillion bytes of data are created around the world. A quintillion has 18 zeroes, by the way, so that's a lot of data. Scientific and scholarly publishers clearly must be picky about the kind of data they collect. You suggest that zero-party data is where to start. What is zero-party data?

CHALLICE: Great question. Zero-party data is data people give you about themselves. So when someone fills out a form and says this is my name, this is my institution, this is my role at that institution – associate professor, assistant professor, what have you – that's zero-party data. If they sign up for ToC alerts, for example – they say I'm interested in pediatric cardiology, or I'm interested in sociology – then they're also giving you zero-party data in terms of what they're interested in.

What I'd say about zero-party data is that it's very important, but it's absolutely not where you can stop. What you need to move to if you're going to compete effectively is what we



call first-party data, and first-party data is what you as a publisher observe by being a careful listener of what people do on your digital platforms.

KENNEALLY: As consumers, John, we're all aware, and some of us are even alarmed, that companies collect financial and demographic data. You advise publishers, though, to concentrate their attention on behavioral data. Explain why.

CHALLICE: So there are a few reasons for this. One is that certainly some publishers might find some financial data around past purchases and so on to be of interest, but I'd make a big distinction between what people who cater to consumers are interested in – by the way, there, there's a lot of – there are other kinds of data. We talked about zero-party and first-party. There's also second-party data and third-party data. Third-party data is the one that everyone's a little suspicious about, and rightfully so. That's the stuff that gets traded. It tends not to be wildly clean. There are, that said, billions of dollars in – it's a multi-billion-dollar market trading in this data and providing it to people.

But for scholarly publishers specifically, what you're interested in understanding is maybe less around what people say they do and more around what they actually do. So if you're interested in being able to serve people information they find useful, suggestions on things that they might find relevant at points in their natural workflow where they would actually be useful, then you need to be watching and listening – I call it listening – to what they're saying and what they're doing. That's where the behavioral data comes in.

So examples of behavioral data in scholarly publishing are things like what topical affinities people have. What do they read? How do they read? What formats do they prefer? What time of day do they tend to read? What sorts of things cause them to open emails that they're sent? What things have the highest open rates and click-through rates? What events do they go to? That's another good one for certainly publishing societies, many of whom run events. The same's true for online courses, for example. If the society or publisher, for that matter, offers courses and they have an LMS, all of that is behavioral data that's useful not only in serving customers directly – you can connect those two dots easily, I think – but also in thinking about future product development, for example. So publishers can also see things like what topics are people interested in where my content corpus is weak, which suggests places that they might want to go out and commission or places where maybe a special issue might be helpful and heavily subscribed? That kind of thing.

KENNEALLY: John Challice, tell me – what is the golden record for a customer data platform?

CHALLICE: So a golden record is that 360-degree view of your customer – everything that you as a publisher know about a reader all in one place. That's it. That's the gold. In order to



do that, you need to liberate data from the data silos that it tends to be in. Most publishers have customer data scattered throughout their organization lots of different places. One of the things a CDP does is it brings all of that together. So CDPs not only bring all that data together, so un-silo customer data, they also allow the easy collection of behavioral data, and then they allow the actioning of that data.

Think about it as a two-way integration. Not only is data coming into the customer data platform, it's also being pushed out, which allows data to be consistent, so you won't have one address for a customer one place and another address in another, but also you can build segments. That's the very special thing that CDPs do. They allow you to – as a publisher, for example – build a very nuanced segment of people who have visited one of your digital properties in the last 60 days, which is a behavioral attribute, who live in China, which is a demographic attribute, who are interested in thoracic surgery, which is another behavioral attribute or a topical affinity, and who have a title of associate professor or higher. All of that can be done in a CDP instantly, and that resulting segment can be pushed out into your marketing system, for example, allowing you to email those people, perhaps send them a special newsletter or information about an upcoming webinar or a special issue, author recruitment, something like that.

KENNEALLY: John Challice with Hum, what should publishers tell their audiences about their data collection efforts when it comes to creating these customer data platforms?

CHALLICE: Well, the short answer is everything. One of the things that scholarly publishers have as an asset is trust. People trust member associations and publishers to do the right thing – certainly scholarly publishers to do the right thing – and the right thing is to let people know what you're doing.

I think third-party data and targeting cookies and tracking cookies that allow people to do off-platform advertising and retargeting and stuff like that – those have been overused and used in bad ways, and they've given those industries sort of a bad reputation. We're not talking about that. I think if you say to people, hey, we're going to watch what you're interested in, and we're going to learn more about your formats, and we're going to use your first-party data – that is the data we see, we catch, from you interacting with our platforms – to improve what we offer to you, then most people will say, yeah, I'm all in on that.

And what it gives them at the end is more personalization. So if you're a publisher, and everybody who comes to your website has the exact same experience every time they come, you're doing zero personalization. Compare that to what happens with other products we're familiar with, like Netflix or Spotify or Amazon, where everybody has a very different experience based on past interactions with the site. We're talking more



about the latter. How do we help publishers do highly personalized interactions that people find beneficial? People are interested in that. They find that convenient and helpful. So they're quite willing to say, yes, you may have my data. But publishers should always tell people what they're doing. No question.

KENNEALLY: That kind of personalization of data also means that if I change my mind – if I want to go dark on you, if I want to be private again – it's just that much easier for you to do and that much more for me to feel confident that you've taken care of it.

CHALLICE: Yeah, that's an excellent point. One thing that I would say to people who are like, boy, this sounds risky, collecting all our customer data into one place – my answer would be, well, what do you do if you don't do that? If somebody comes to you who's from Europe, for example, and covered by GDPR, and they say I would like you to forget about me, how hard is it for you to go in and find all the places where you have data about them and remove it? It's probably an enormous effort if you don't have a CDP. CDPs make that much easier. Our CDP – it's a two-button process to forget about somebody if they ask that.

And the way we interact with things like cookie consent banners is at those points where people are saying I consent to the use of cookies – if it's analytics cookies, which is what we are – we'll collect the data, and if they change their minds, then we'll stop collecting it. And if they change their mind again and come back, we'll start collecting again. It makes it very easy to do that.

KENNEALLY: For scholarly and science publishers, John, how does data segmentation help with recruitment of contributors and researchers for peer review?

CHALLICE: It goes back to that example I cited a minute ago of the ability to create a segment of people – a dynamic segment – that is to say as people qualify for it, they move into it, and as they disqualify for it, they come out of it – where you just list criteria. So if you're a photonics publisher, and you have a special issue coming up on a special topic in photonics, and you're recruiting people for it, the first thing you'd be able to do is go into Hum or a comparable CDP and say show me everybody who's shown any – or say medium or above engagement with that topic in the last 180 days. And you can literally build that segment in 12 seconds.

Now, you've got a list of people, some of whom are identified, and some of whom are anonymous. You don't know who they are. You might know what institution they're at if you have an IP registry. But you know that they're interested. And you can serve them a modal. You can serve them an ad. If you know their email address, you could send them an email. And you can inform them about this issue, and you can essentially nurture them,



market to them, and invite them along on the journey and say, hey, I know you're interested in this topic, and I know you've been visiting our digital properties. Would you be interested in participating? If so, click here for more information. The second they do that, now you've started to build a way to sort of talk to those people directly, and again, nurture them on their journey to becoming contributors. The same is true for reviewers.

Same for open access authors. If you have read-and-publish deals, we can link IP registries in Hum. That's very easy. We've done that for a number of our clients. So I don't know who you are exactly, but I know you're coming from Penn State University, and I know I have a read-and-publish deal at Penn State. So the second you go to the information for authors page, for example, I can pop up a modal that says, hey, looks like you're thinking about authoring a paper. I could remind you that you can publish a paper with us for free because you're at Penn State. These are very helpful tools.

Again, if you think about it, people are probably used to things like this in their personal lives, but there's a dearth of tools like this for scholarly publishers. That's where we're trying to help them catch up.

KENNEALLY: John Challice with Hum, thanks so much for joining me on the program today.

CHALLICE: Christopher, thank you for having me. This is a pleasure to be here.

KENNEALLY: That's all for now. Our producer is Jeremy Brieske of Burst Marketing. You can subscribe to the program wherever you go for podcasts, and please do follow us on Twitter and on Facebook. You can also find Velocity of Content on YouTube as part of the CCC channel. I'm Christopher Kenneally. Goodbye.

END OF FILE