

Preference Management

January 1, 2018

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Summary

For most companies, a preference center is a basic data storage portal that visitors use to inform suppliers of their preferred communication requests. Personal privacy regulations being introduced by governments around the globe, in conjunction with a greater awareness of personal privacy, are raising awareness about the importance of a comprehensive preference management strategy. For companies operating in multiple geographies, it is critical to understand the regulations that govern the storage, usage and sharing of personal data in those geographies before defining a consent and preference management strategy.



What's in this report?

Marketers are always seeking a more informed understanding of markets, customers and contacts. However, new techniques and technologies for data gathering and analysis constantly challenge the way marketers conduct their craft. For most companies, a preference center is a basic data storage portal that visitors use to inform suppliers of their preferred communication requests (based on a limited selection of choices), which may include a choice to opt out of all future marketing communications. Typically, little time and few resources are invested in preference centers.

Personal privacy regulations being introduced by governments around the globe (e.g., GDPR in Europe, AAPI in Japan, Privacy Act in Australia, PIPEDA in Canada), in conjunction with a greater awareness of personal privacy, are raising awareness about the importance of a comprehensive preference management strategy. In this report, we provide a justification for making preference management investment a high priority, along with key strategy components.

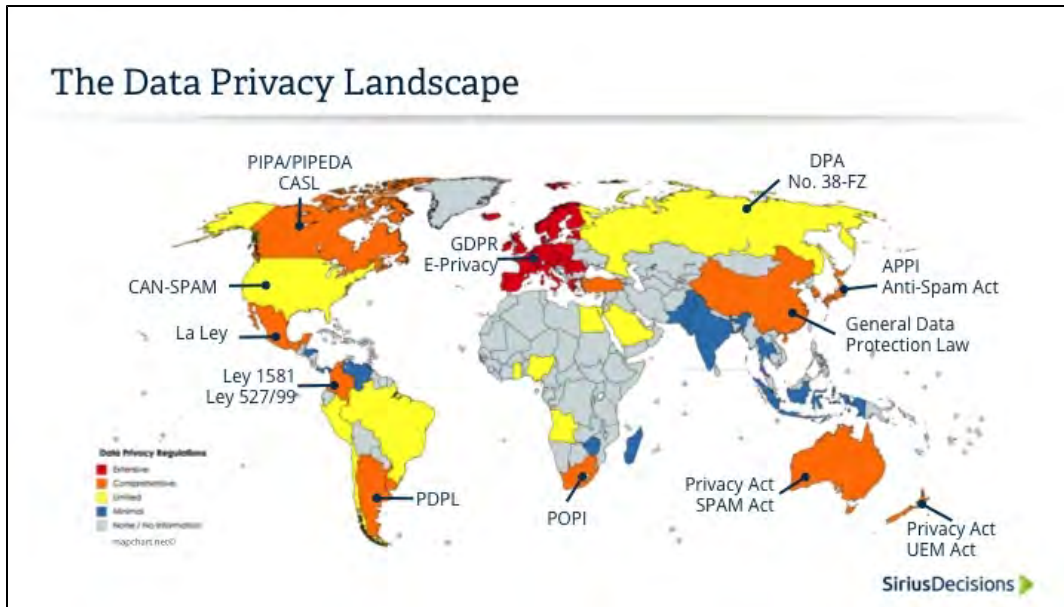
The following specific topics are addressed in this report:

- Data privacy. We provide a brief overview of the global personal data privacy regulatory environment that is becoming a catalyst for change.

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- Core components. We describe the components required to form a well-rounded preference management strategy — a compliance library, a structured preference collection, a preference center and an organized set of compliant communications.
- Supporting components. The strategy requires the coordination and support of many functional areas, including some that require special attention. We discuss the importance of solid functional interlock and of piloting a strategy to align content, process and technology.



How pervasive are data privacy regulations around the world?

In all geographies, there is an increasing awareness and focus on data privacy concerns. A growing number of countries have introduced or strengthened laws to safeguard personal data from theft and/or misuse. As a result, companies operating within multiple geographies are being forced to become experts in regional data privacy regulations. They must adapt their IT, marketing and sales infrastructures accordingly or run the risk of significant fines and negative publicity.

In the European Union, the Global Data Protection Regulation (GDPR) includes fines of up to 4 percent of worldwide revenue. Canada's Anti-Spam Legislation (CASL) contains penalties of up to 10 million Canadian dollars per violation for corporations. In Japan, businesses that violate the Act of the Protection of Personal Information (APPI) and fail to follow corrective actions are subject to both fines and imprisonment. In Australia, repeat offenders of the SPAM Act face penalties of up to \$1.7 million Australian dollars

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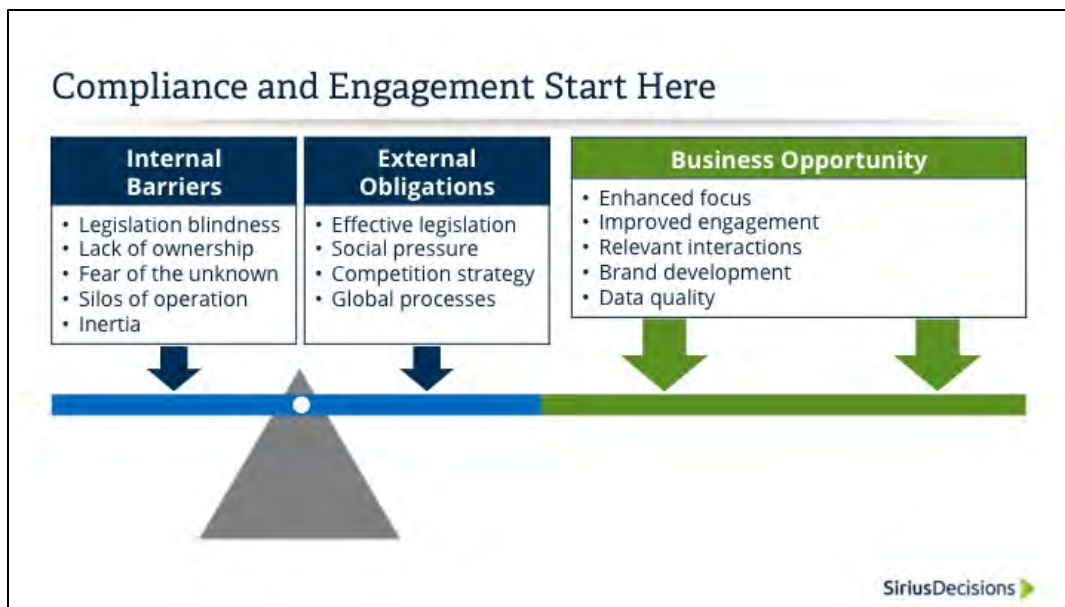
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per day. In Mexico, the regulatory body can impose monetary sanctions up to 25 million pesos.

For organizations that market to prospects around the world, the danger of being fined is real, as the large contact databases they maintain for marketing purposes contain millions of items that relate to prospects' personal data. To reduce their risk, organizations are adopting opt-in policies that ask prospects to consent to having their personal data used to send marketing communications.

While this is an important first step, organizations need to develop a broader preference management strategy that outlines a robust system for offering prospects a way to specify personal data items they are willing to share and how they wish that data to be used. This approach enables prospects to specify, for example, who may contact them, on what topics, for what purpose, and under what circumstances (e.g., frequency, delivery mechanisms). By going beyond opt-in to develop a fuller preference management strategy, organizations can stay ahead of the regulations and stay in sync with their prospects.



What factors drive interest and investment in a comprehensive preference management strategy?

For many organizations, a regulatory compliant and opt-in approach to marketing requires a dramatic shift — in process and behavior — across most functions. When putting together a business case for the development of a preference management

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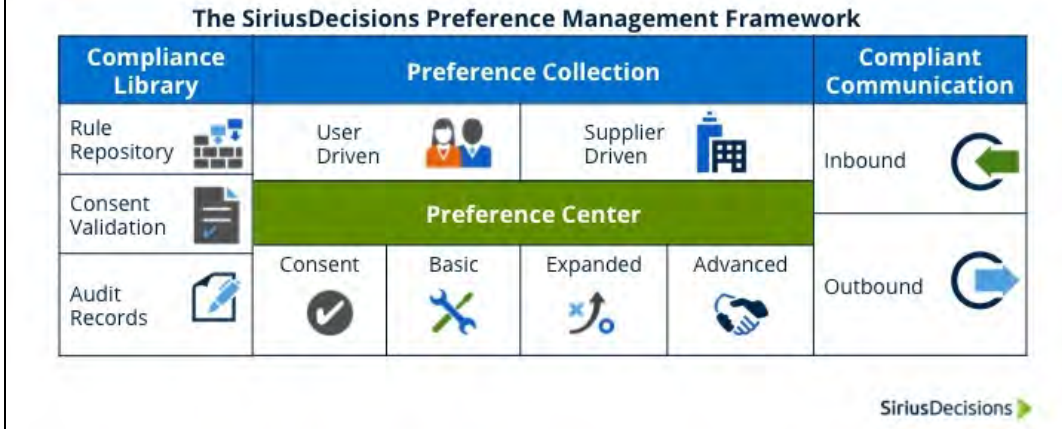
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strategy, in addition to recognizing the risk of severe fines, promote the positive and long-lasting business benefits (e.g., market engagement, more relevant interactions) that can be achieved as a direct consequence of complying with privacy regulations and delivering on a subscriber's stated preferences.

An effective preference management strategy is one piece of a larger puzzle, and overcoming opposition to change within the organization requires planning, investment and time. To promote a groundswell that will tip the scale in favor of adopting a comprehensive policy, understand the barriers to change (see [“Change Management: Humanizing Change”](#)) and overcome them with arguments that discuss both the business obligations and opportunities.

- **Internal barriers.** Resistance to change, a result of fear of the unknown, a misunderstanding of facts or organizational constraints, can sap motivational energy if allowed to go unchecked. Organize an educational program geared toward relevant functions, building functional interlock through webinars and regular meetings. Be sure to clearly state goals, responsibilities, benefits and the action plan.
- **External obligation considerations.** Privacy legislation is being adopted across the globe and often blurs the line between private and professional environments. Private-sphere expectations are transferred to the business sphere, placing added pressure on companies trying to build positive relationships with prospects. Companies adapting compliant processes have improved inbound and communication strategies. From a technical process viewpoint, consider the cost savings, ease of data maintenance and employee training required to adopt similar processes that satisfy one jurisdiction's requirements but go beyond the legal needs of another.
- **Business opportunity.** The drivers of change and improvements in preference management are strong, but don't underestimate the strength of inertia. Focus on the positive elements — improved engagement, brand development and higher data quality — that drive marketing ROI with greater and more frequent relevant prospect interactions.

Preference Management Strategy: Core Components



What are the core components of a preference management strategy?

Preference management extends beyond consent management to encompass an evolving preference center and proactive management of the flow of data into and out of the organization. There are four core components of a preference management strategy:

- **Compliance library.** The collection of personal data increases the personalization and relevance of communication and is closely connected with privacy regulation. To ensure the correct procedures are followed, preference data capture and storage must be linked to systems that house the data process rules that drive compliance, manage consent across all data systems, and enable the auditing and recording of all transactions.
- **Preference collection.** Companies must introduce a comprehensive approach to preference data collection that looks beyond Web online capture. Information gathered at events and from telephone conversations and written communications also must be considered. This requires a review of current collection processes across all externally facing functions, as well as subsequent employee training.
- **Preference center.** The development of a preference management strategy must align with how the company wishes and is able to interact with prospects and customers. The preference center is at the heart of such a strategy, and organizations must determine the appropriate investment in resources and

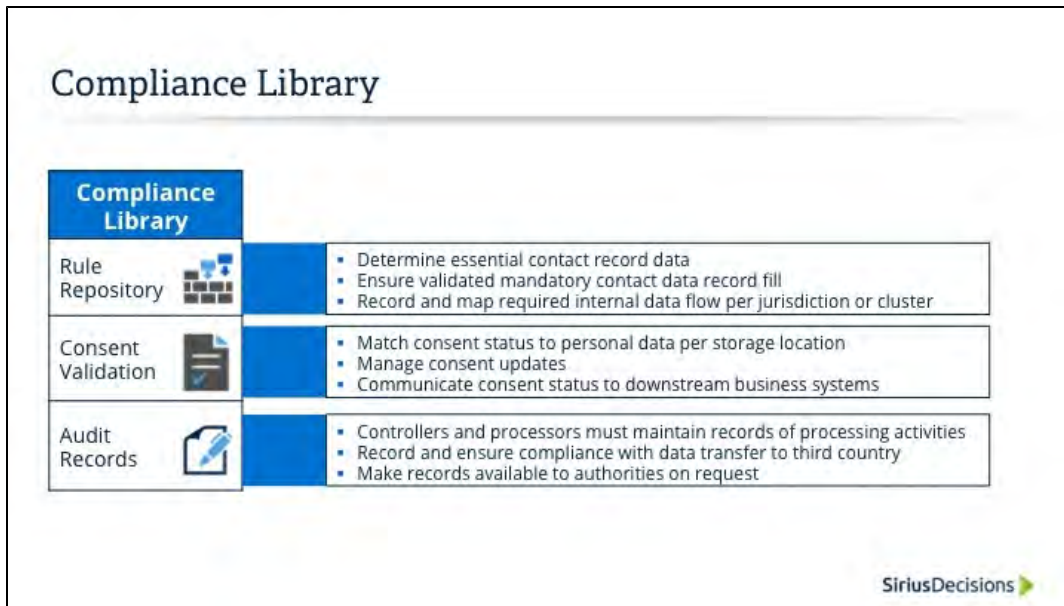
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technology. At one end of the spectrum is straightforward consent capture, which progresses, via basic and expanded capabilities, to an advanced position where preference management is pivotal to overall go-to-market communications.

- Compliant communication. As an organization continues to expand its portfolio of communication options, it must do so with the confidence that all of its communications are both legal and relevant.



What is the purpose of the compliance library?

The compliance library is the bedrock that keeps a company honest. It enables legislative requirements to be operationalized and adhered to. The three critical elements of this library are a rule repository, the systematic control of consent, and the ability to store, track and audit consent transactions.

- Rule repository. Organizations must decide which personal contact data they will collect and store. Decisions also must be made about the approach to compliant process adherence. Possible approaches include setting rules for each specific jurisdiction in which the company operates, or forming a cluster of countries that have similar and compatible regulations and adopting processes that will satisfy the most stringent legislation. We recommend the latter approach, as it removes the requirement to cater to every paragraph of every law, and it is more practical from an internal adoption viewpoint. To enable the processing of data, determine which contact fields are mandatory and need to be validated upon record fill (e.g., country,

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email address, name). Record and map the required internal data flow per jurisdiction or cluster. We have seen examples where a compliance matrix was built within an organization’s marketing automation platform (MAP) that mapped all possible combinations of consent options that could potentially be required. Country/cluster names were then assigned to the appropriate consent combination and, on entry, each contact was processed according to his/her country status.

- **Consent validation.** Companies store personal data in various locations (system and geographic). It is increasingly unlikely for companywide consent governance to be managed from a single instance of a marketing system. Process adoption and technology investment are required to enable a company to match consent status to personal data per storage location to ensure compliance. Consent is not a one-time activity. Situations arise where contacts update consent privileges themselves or companies, in accordance with legislation, must seek a consent renewal. It is vital that each consent status is communicated to downstream business systems.
- **Audit records.** Controllers and processors must maintain records of activities related to data privacy. Record and ensure compliance with data transfer to any third country. In addition, establish procedures that make records available to authorities in a timely manner.

Preference Collection Strategy

Preference Collection Points			
User Driven 		Supplier Driven 	
Type	Privacy Considerations	Type	Privacy Considerations
Written	<ul style="list-style-type: none"> • Unbundled and explicit consent • Privacy policy version • Preference center link • Unsubscribe link • Supplier contact details • Consent time, date, location, device • Consent storage 	Outbound call	<ul style="list-style-type: none"> • Consent script • Privacy policy version • Consent capture process • Consent confirmation process • Consent time, date, location, channel • Consent storage
Inbound		Event	
Web visit		Sales conversation	
User request		Outbound mail	

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Is every prospect interaction a preference collection opportunity?

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Whether initiated by the prospect or the provider, every interaction is an opportunity to learn more. Through this continuous series of information exchanges, marketers uncover what they need to acquire and retain prospect opt-ins. Too often, however, marketers shackle their efforts by planning tactics as standalone activities. By examining all potential collection points upfront and carefully selecting the tactics to leverage at each point, organizations can increase their odds of gaining valuable preference insights as well as securing opt-ins.

- **User-driven collection points.** A user-driven collection point is one where the prospect initiates the exchange. This can occur via either a human-to-human or a non-human interaction (see [“The Buying Interactions Model”](#)). Examples of user-driven collection points include written exchanges such as email and chat; online exchanges such as Internet searches and social media interactions; Web site visits and user requests such as trial registrations or downloads. In a user-driven exchange, opt-in requests can automatically be triggered via the Web site and MAP. Furthermore, followup questions and recommendations can be triggered by the prospect’s actions, offering a value-add at the moment of exchange. Valuable information can be gained by examining the type, context and content of the prospect’s actions in aggregate.
- **Supplier-driven collection points.** A supplier-driven collection point is one where the provider initiates the exchange. This can occur via a human-to-human or a non-human interaction. Examples include outbound calls where the call itself, or information obtained during the call, may be recorded; live or virtual events, where information obtained during the event may be captured; sales conversations where information discussed may be stored for future reference; and outbound email or direct mail where information may be requested and responses captured. Marketers should think of these as two-stage collection points, where two tactics may be used in tandem — e.g., collecting opt-in and preference information via a recorded call and then sending a followup confirmation email, embedding an opt-in form in an event app, or implementing a double opt-in email process.
- **Privacy considerations.** Whether preference collection is initiated by the prospect or the provider, organizations always must comply with relevant privacy regulations (e.g., ensuring all opt-in requests are unbundled and explicit in nature and links are provided to a specific privacy policy version).

The Four Stages of a Preference Center

Preference Center			
Consent 	Basic 	Expanded 	Advanced 
Permission: <ul style="list-style-type: none"> Opt-in/out per delivery mechanism, per user ID Duration 	Permission: <ul style="list-style-type: none"> Frequency Topics Delivery mechanisms 	Permission: <ul style="list-style-type: none"> Expanded opt-in choices (local options) Renewal reminder 	Permission: <ul style="list-style-type: none"> Persona, industry or job role groupings
Preference:	Preference: <ul style="list-style-type: none"> Basic profile information (function) Content format 	Preference: <ul style="list-style-type: none"> Expanded profile data (language, affiliations) Expanded UI (e.g. thumbnail images) Integrate predictive data 	Preference: <ul style="list-style-type: none"> Multiple access points Format personalization Content ratings and subscriber numbers Company unified data
Reporting: <ul style="list-style-type: none"> Type of consent Consent timestamp 	Reporting: <ul style="list-style-type: none"> Consent device 	Reporting: <ul style="list-style-type: none"> Consent location 	Reporting: <ul style="list-style-type: none"> Consent access point

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What are the core components of a preference center, and how do they evolve over time?

If designed and utilized properly, preference centers enable B2B marketers to better understand what buyers are interested in and leverage this information to provide increasingly relevant offers. Although many providers offer Web-based opt-in or opt-out forms, there is an important difference between these forms and a preference center. A Web-based opt-in or opt-out form enables prospects to specify preferences at a single point in time, whereas preference centers enable users to update and expand their preferences on an ongoing basis.

Organizations building a preference center should include the following areas to adequately capture prospect opt-ins and to develop accurate personalized communications:

- **Permission.** The preference center should explicitly request and capture prospects' freely given, specific, informed and unambiguous indication of their agreement to the storing and processing of their personal data, as well as their wishes to receive (or not receive) information on an ongoing basis.
- **Preference.** Just because a buyer agrees to receive ongoing communications does not automatically make the communication relevant. For this reason, the preference center should have the ability to capture information such as the prospect's geographic location, language preferences, account buyer role and stage in the

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buying cycle.

- Reporting. The preference center should enable marketers to track opt-in status across a range of factors (e.g., opt-in type, date, device, location) in order to understand their database readiness.

We recommend planning the evolution of a preference center in four stages. In the first stage — consent — focus on adequately capturing and reporting opt-in status. In the second stage — basic — begin to enhance the opt-in options available, providing more granular levels of consent. Organizations should also begin to request basic profile information that will enable them to personalize future communications. Note that while consent information should be mandatory, preference information should be optional. The third stage — expanded — adds explicit consent renewal requests and includes additional profile information such as language. In the fourth and final stage — advanced — organizations using personas should begin to group consent options by persona and share which options are most often chosen by persona. In all stages, organizations always must adhere to the preferences prospects have selected. Any deviation from these promises will result in increased opt-outs.

Delivering Compliant Communications

Compliant Communication	Online	Offline
Inbound 	<ul style="list-style-type: none"> • Web site • Chat • Digital ads • Mobile app 	<ul style="list-style-type: none"> • Content syndication • Social media • Professional associations
Outbound 	<ul style="list-style-type: none"> • Email • Mobile text • Social media • private mail 	<ul style="list-style-type: none"> • Trade show stand • Industry conference • Inbound call

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How can organizations leverage preference information when sending out prospect communications?

Organizations that have a preference center can leverage its information to make prospect communications more relevant and engaging. This approach must be applied




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across all prospect communications, not just those coming from marketing. For prospects to feel that their interests and requests are being taken into account, marketing, tele and sales must ensure their prospect communications are informed by the data captured via the preference center.

- Inbound marketing. This type of program targets an unknown audience using tactics placed at a prospect's typical information-gathering points, delivering value-added content either directly or indirectly (see "[Inbound Marketing, the Sirius Way](#)"). Examples include online and offline tactics (e.g., Web site content, trade show materials). At first glance, preference centers may appear only to help marketers personalize communications to known prospects. But if preferences are anonymized and aggregated by persona, geo or industry, they can provide valuable insights on where to place and how to tailor inbound marketing tactics to increase the likelihood of attracting the target audience through greater relevance.
- Outbound marketing. This type of program targets a known audience using tactics directly addressed to or delivered to the prospect, and directly or indirectly delivers value-added content. Examples include online and offline tactics such as email and direct mail. The information gathered via the preference center provides marketers with a more holistic view of the prospect than is possible based solely on a prospect's name, address, email, phone number and job title. Specification of language preferences, industry and buyer role helps marketers tailor the content of their outbound communications. Preference center data also can automatically trigger outbound communications (e.g., an invitation to an upcoming event). Furthermore, progressive profiling tactics can be used to augment preference center data and create an increasingly holistic view of prospects while continuing to enhance the relevance of information.
- Opt-outs. Even if prospects get in touch to unsubscribe, preference centers can help organizations respond in a more meaningful and relevant way. Offering the option to opt down or take a break can maintain engagement with the prospect. Asking for feedback on why the prospect would like to unsubscribe can provide valuable insight into potential improvement areas.

Preference Management Evolution			
	Basic 	Expanded 	Advanced 
Information	<ul style="list-style-type: none"> • Permission opt-in • Mechanism type 	<ul style="list-style-type: none"> • Multiple opt-ins • Expanded profile data 	<ul style="list-style-type: none"> • Dramatic value exchange • Ability to support my job
Technology	<ul style="list-style-type: none"> • Web • Integrated MAP/sales force automation (SFA) system 	<ul style="list-style-type: none"> • Many sources (EMS) • Preference management systems 	<ul style="list-style-type: none"> • # of subscribers • Content rating • Custom Web systems
Process	<ul style="list-style-type: none"> • Compliant by jurisdiction 	<ul style="list-style-type: none"> • Incorporate local options 	<ul style="list-style-type: none"> • Unified company data • Sync across channels
Internal Usage	<ul style="list-style-type: none"> • Marketing field teams • Sales data synced 	<ul style="list-style-type: none"> • Demand center • Teleservices 	<ul style="list-style-type: none"> • Marketing (+ campaigns) • Sales operations
Ownership	<ul style="list-style-type: none"> • Legal/owner/board • Web team 	<ul style="list-style-type: none"> • Marketing operations • Corporate/global demand center 	<ul style="list-style-type: none"> • Permission/preference office



How does a preference management strategy evolve?

An effective preference management strategy requires setting and meeting objectives for the planning, coordination and execution of multiple elements. To maintain momentum, follow an agreed-upon evolution plan covering basic, expanded and advanced stages as part of an approach to improve contact engagement.

- **Information.** Consider the degree of content focus and the direction of information exchange. Move from single-contact consent control to the capture of multiple mechanism opt-in (e.g., telephone, text) and more pertinent personal data to drive an improved two-way conversation. Align content creation to deliver value to the contact in line with recorded preferences.
- **Technology.** This area is undergoing rapid transformation as solutions within the relatively new technical categories (e.g., consent management, preference management, data mapping) are made available.
- **Process.** A minimum process requirement is to ensure compliant data governance per jurisdiction. While technically this can be rapidly expanded to cater to local offerings (e.g., language, specific content), ensure alignment with planned campaign and content development. Failure to do this will result in poor delivery against a subscriber’s preference expectations. Expand data unification across other functional channels to coordinate and make better use of known preferences that exist within the company.

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- Internal usage. Initially, field marketing teams are the primary users of preference data, and sales teams should be encouraged to use and supplement the information available to improve prospect communication. Over time, central and regional demand centers, campaign and tele teams can make greater use of preference data as an input to planned activity to drive improved interactions.
- Ownership. All captured data preferences are managed by the company owners, and for purely consent-based capture, day-to-day ownership will most likely reside with a Web team. As usage expands and affects other disciplines, ownership may be transferred to marketing operations or a global demand center. As its importance grows and expert coordination of all elements becomes more sophisticated, consider staffing a dedicated permissions/preference office.

Preference Management: Technology Gap Analysis

Priority X: Preference Management		Process		Competency		Technology		Recommendations
Functional Capabilities	Criticality	Rating	Difficulty	Rating	Difficulty	Rating	Difficulty	
Elementary Consent Capture	Must have	3	Min.	3	Min.	2	Mod.	Define capture process and expand MAP usage
Basic Consent Capture and Preference Offering	Must have	1	Mod.	2	Min.	2	Mod.	Evaluate current process for recording preference requests, train staff
Expanded Preference Management Options	Desired	0	High	1	High	1	Min.	Evaluate PM-specific technology; cross-functional process review
Advanced Preference Management Options	Future	0	Mod.	1	Min.	0	Min.	Requires new business rules for positioning of PM within company

0 Does not exist 1 Does not meet desired capability 2 Meets desired capability 3 Exceeds desired capability 4 Far exceeds desired capability

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What steps should be considered when investing in supporting technology?

Initially, organizations start by adopting standard preference center templates from a MAP. They may expand incrementally from this starting point but soon may need to consider surrounding an existing technology stack with consent management systems to cope with multiple and geographically dispersed data instances (e.g., MAP, SFA, event management systems). Evaluate specialized preference management systems, which offer greater flexibility for an expanded preference strategy. Consider also the requirement to capture, use and maintain consent gained from non-Web sources (e.g.,

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telephone recording, client meetings). Finally, investigate systems that allow greater personalization and evaluation of the effectiveness of the preference center (e.g., content rating systems, engagement tracking).

To justify the investment case for supporting technology, conduct a thorough gap analysis by listing desired functional capabilities for each stage of development, and note the criticality of each capability to the deployment of an enhanced preference management strategy. Is the capability a must-have, nice-to-have, or future capability? Investment must consider not only the system capability, but also the process and staff consequences should the request for funds be successful. To determine the gap, score the current ability to provide the capability on a scale of 0 to 4 from a process, staff competency and technology perspective. Also indicate the difficulty of overcoming the gap and initial recommendations for addressing it.

The gap analysis enables the stakeholders and investment steering committee to come to several important conclusions: the proper scope for a technology-based solution; process improvements that are required to ensure that the new technology provides value (or to avoid the need for new technology investments); and staff hiring and/or enablement needs to ensure the new technology will provide value. The bottom line is that organizations must not jump into a technology solution. Rather, they must first determine where the true gaps exist, and then scope out the technology that best addresses these gaps.

Functional Interlock

	Compliance Library	Preference Collection	Preference Center	Compliant Communications
Owner	Compliance Team	Demand Center	Demand Center	Demand Center
Owner Role	<ul style="list-style-type: none"> Select relevant compliance rules Automate consent request and validation Store consent records 	<ul style="list-style-type: none"> Consent template and script Preference collection template and script Confirmation template 	<ul style="list-style-type: none"> Client preference center links (update, unsubscribe) Preference center UI (Web, mobile) Preference center personalization 	<ul style="list-style-type: none"> Consent validation Personalization Progressive Profiling Consent renewal templates, scripts
Users	<ul style="list-style-type: none"> Field marketing Demand center Sales Marketing ops Sales ops 	<ul style="list-style-type: none"> Comms/digital Field marketing Event marketing Tele Sales 	<ul style="list-style-type: none"> Comms/digital Field marketing Event marketing Tele Sales 	<ul style="list-style-type: none"> Comms/digital Field marketing Event marketing Tele Sales

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Which functions drive the preference management strategy, and what are their roles?


To implement a preference management strategy, multiple functions within the organization must come together to discuss each component of the Preference Management Framework. Clear ownership should be established for each component, and all functions that will use the information must be identified.

- **Compliance library.** The compliance library owner creates the rule repository that codifies the corporate data privacy compliance strategy. The owner also creates the mechanism that multiple functions will use to store prospect consent for audit purposes and verify opt-ins as needed. Due to its tight coupling with the corporate data privacy compliance strategy, the compliance team is the appropriate owner of this component. This ensures that changes to the corporate data privacy compliance strategy will be reflected. The functions that heavily depend on this component are marketing operations, field marketing, the demand center, sales and sales operations.
- **Preference collection.** The preference collection owner defines the processes and templates used to collect consent and preference data at each collection point. As a center for digital excellence, the demand center is the appropriate owner of this element (see [“The Evolving Role of the Demand Center”](#)). If no demand center exists, ownership should fall to the central digital marketing function. The functions most impacted by these processes are the external-facing teams, namely field marketing, event marketing, tele and sales.
- **Preference center.** The preference center owner creates the preference center in the MAP or a standalone preference center application. As the center for MAP excellence, the demand center is the appropriate owner. If no demand center exists, ownership should fall to the central digital marketing function or marketing operations. The functions most affected by these processes are field marketing, event marketing, tele and sales.
- **Compliant communications.** The compliant communications owner delivers the automated program flow used to check for opt-ins and personalize communications in line with preference data, use progressive profiling to enhance prospect profiles and trigger automatic outbound communications based on prospects’ interests. As the demand center enables consistent scalable marketing programs across regions, it is the appropriate owner. If no demand center exists, ownership should fall to the

users: field marketing, event marketing, tele and sales.

Setting Up a Preference Management Strategy

Preference Management Pilot	
Team Makeup	<ul style="list-style-type: none"> Secure functional representation, especially from Web, content, regional marketing and IT Consider attitude and a broad range of employee tenure in selection
Goal Setting	<ul style="list-style-type: none"> Set specific goals stating that proposed action should lay foundation for future expansion Initially set relatively small goals that can be stretched if achieved
Expectation Setting	<ul style="list-style-type: none"> Pilots are experiments; work to define what constitutes success and non-success Complexity increases exponentially with the addition of languages and user choices
Controlling Variables	<ul style="list-style-type: none"> List factors that drive preference management activity (e.g. technology, resource allocation) Record and articulate the effect if these factors should alter beyond the pilot
Assumption Testing	<ul style="list-style-type: none"> Test whether the hypothesis and assumptions used in pilot setup were accurate Propose alternative assumptions if required
Scenario Definition Testing	<ul style="list-style-type: none"> Test suspected data flows and technical integrations Track variations of what was designed and expected, and provide suggested causes
Data Collection/Tracking	<ul style="list-style-type: none"> Set appropriate metrics (e.g. % increase in engaged contacts) and report consistently Record achievement against milestones, including qualitative data that will aid refinement
Pilot Duration Definition	<ul style="list-style-type: none"> Determine a timeframe or a milestone that provides a valid indication of success Record and report outcomes against previously agreed goals

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What is an effective piloting approach when introducing a new preference management strategy?

Applying lessons from a pilot program increases an organization’s chances of being successful when any new process, technology or project is implemented on a larger scale. By piloting the initial introduction of a comprehensive preference management strategy, or the expansion of an existing strategy, organizations can quickly prove or disprove base assumptions, determine the effectiveness of process and structure, or understand what needs to be changed before a full-scale implementation can be undertaken.

A pilot requires the same amount of planning as any other program a team would typically implement. However, many B2B marketing functions have a limited period of time to introduce a preference management strategy before signs of success must be proven. In addition, employees have multiple and competing priorities that require attention. As a result, processes, people or technology are often put in place too quickly. Although those involved may be doing their best, they may not necessarily have the experience to know what works.

Use the chart above as a checklist to create a plan that addresses the pilot’s team member responsibilities, objectives, scope, tools, implementation or execution plan, budget and timeline.

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Before the preference strategy can be established as part of the marketing repertoire, the pilot must be perceived as successful. Organizations must be prepared to alter processes and expectations in accordance with the findings of the pilot, but, for the sake of future investment, they also must ensure that the benefits to the business have been recognized. To this end, select the pilot team with care, don't overpromise to senior executives what the pilot will deliver, and offer clear, fact-based reasoning and corrective solutions in the face of any roadblock presented in the course of the pilot.

Key Takeaways and Recommendations

- Understand the regulations that govern storage, usage and sharing of personal data in target geographies
- Integrate consent management and preference management for greater leverage and impact
- Shift marketing focus from driving clicks to creating genuine two-way interactions with prospects to gain greater insight into preferences
- Share links to the preference center from all programs and prospect touchpoints to enable easy updates, renewals or opt-outs
- Ensure that all prospect communications respect prospects' opt-outs and preferences

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What are some final takeaways I can share with my team?

For companies operating in multiple geographies, it is critical to understand the regulations that govern the storage, usage and sharing of personal data in those geographies before defining a consent and preference management strategy. Organizations must establish a set of comprehensive data privacy policies to help them manage compliance against these regulations (see [“Implementing the Data Privacy Compliance Model”](#)).

With a corporate data privacy compliance strategy in place, organizations should integrate their consent management approach and any pre-existing preference collection applications to create an entry-level preference center that delivers a consistent approach to collecting and recording prospect opt-ins. As the percentage of opt-ins grows and additional investment is possible, organizations should focus on enhancing preference data collection via an expanded preference center, but only if all

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externally facing functions are willing to guarantee that all prospect communications they create will respect the preferences specified by prospects.

Once the preference center is up and running, marketers should promote it through multiple channels, providing multiple entry points (e.g., Web, email, phone, mobile app) to drive adoption. Make the preference center a central component of every inbound and outbound marketing program by leveraging preference data to help segment the target audience and personalize the messages. This will enable marketers to shift their focus from driving clicks to creating genuine two-way interactions with prospects, which will ultimately deliver greater relevance.

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