



## The 21-Day Fix For Personalization

### Warmup: Get the data right.

You can't commit to a personalization program if you don't have the right audience data.

1.

Confirm that you're **collecting sufficient customer data and analyzing it effectively**. If not, complete the 21-Day Fix for Big Data.

2.

Conduct a **self-assessment to get a baseline**. Where are you personalizing now, and what are your goals?

3.

Map **existing data points from all sources into a holistic audience view**. Remember, cross-training means being well-rounded.

4.

Start with some light running: **Strategize how you can and want to use your existing data points** or personalization.

5.

Push the pace by jumping rope: **Ensure your data consolidation efforts include relevant data points and sources**.

6.

If you're not already **collecting more than just their preferred names** in your database, start now. Then drop and do 10 push-ups.

7.

Pull up to the bar. **Use information for meaningful profiling and contextual interactions** instead of re-starting every time.

8.

Once you've done some sit-ups in one channel, **expand to the rest**. Now you should have a solid core.

9.

**BREAK!** You should be feeling it now. Move to the next level and do some high-intensity interval training.

### Level 2: Dynamic content.

Raise your heart rate by personalizing content based on the individual's past interactions.

### Level 1: Demographics.

Consider this personalization for beginners. Start by focusing on general conditioning and flexibility.

10.

Lunge past basic audience demographics with **behavioral, psychographic, interaction, campaign, and derived data.**



11.

**Uncover data patterns and group audiences** by similarities to create customer personas. Complete all the repetitions.



12.

Keep pushing! **Hypothesize how each persona will react** to different messages, subject lines, offers, and channels.



13.

Time to test! For a campaign, **create personas based on the hypotheses and last interactions.**



14.

Master the ropes with personalization by device, **using responsive design for a great user experience.**



15.

Send **messages to customers on their preferred channels**, including email, social, and SMS. These squats will pay off.



16.

**Measure results** to determine if personalized communications by each persona are effective. Impressive deadlift!



17.

**BREAK!** Scan the personas and content you've sent so far. Don't be afraid to mix up your exercises to see what works best.



**Level 3: Individualized experiences.**

When you're ready, challenge yourself with the most advanced form of personalization.

18.

You're reaching elite status. **Take stock of where else** you can dynamically personalize based on the individual's customer journey.



19.

Bring it all together. Even within the same life cycle stage, find ways to **differentiate your approach to individuals, leveraging data gathered.**



20.

Budget sufficient **manpower, time and money toward campaign testing, execution, and analysis.** Feels good, right?



21.

**CELEBRATE!**

You've completed the 21-Day Fix for Personalization and are ready to move on to the omnichannel workout.



# Personalization ‘Diet Tips’

To get the most out of the 21-Day Fix for Personalization, it’s important to eliminate the junk food from your diet. Here are five big “don’ts:”

## 1

### **DON’T overestimate the quality of your data**

Improve personalization by consolidating data from multiple sources and cleansing for duplicate, erroneous or incomplete data. This is a common issue for many marketers; don’t let it be you!

## 2

### **DON’T think the name is good enough**

Many brands check off the “personalization box” when they reach this level. While personalizing by name is good, it’s not enough to prove you’re truly fit.

## 3

### **DON’T get too personal**

Consumers like it when their favorite brands recognize their needs and loyalty; however, marketers should be wary of crossing lines, including divulging you know the time a customer spent on your website or mentioning specific pages visited.

## 4

### **DON’T ignore legislation**

Canada and the European Union have passed consumer privacy legislation in the past few years. Make sure you review and understand those laws so you don’t face a fine. Any company that does business with consumers in those regions must comply.

## 5

### **DON’T overlook the details**

Even the smallest details can make the biggest impact. Always spell-check names, and consider time zones and language preferences.

