



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.

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.

