



Personalization Development Worksheet

Who is this for? If you are new to multi-channel marketing, are incorporating personalization for the first time, running a complex campaign, or onboarding new staff, this document is intended to guide you through the key questions for setting up a personalization campaign.

Name of Campaign _____ **Dates Live** _____

Strategic goal/initiative this is related to _____

Reason for running this campaign _____

Audience

Who will see this campaign _____

After creating the segment in Lift: Segment Name _____ Segment Size _____

Content

What the audience will see (and where) _____

What you want them to do with this content _____

What happens after they take the (above) action _____

Link to landing page _____

After they take the action, do they go into a new segment or have a new attribute? _____

Do you want them to take another action? _____

Content Needs

For personalization:

- Copy? (Describe; name of writer; date draft is due; date for final approval)
- Graphics? (Describe; name of designer; date draft is due; date for final approval)
- Confirmation email or other copy?

For landing page:

- Copy? (Describe; name of writer; date draft is due; date for final approval)
- Graphics? (Describe; name of designer; date draft is due; date for final approval)
- Confirmation email or other copy?

Default Content

Don't forget about the default campaign! Make sure you are "comparing apples to apples" by reviewing the asks and content of the default to make sure it aligns with the personalization.

Measuring Success

What are the actions that you want someone to take as part of this campaign? When will you know if they took the action? _____
Define primary metric _____ Define secondary metric _____

Analyzing Results

While the campaign is running, or once it is complete, review results as described below. Make sure to include screen shots, links, or descriptions of the personalized and default content so you can reference it in the future. Below is an example of what this might look like.

What was tested: As part of a new initiative to engage visitors from Boston, we targeted a portion of the “current location is Boston” segment. Half of the audience saw the default content in the homepage hero while the other half saw the personalization. The copy and ask were the same for both audiences, but the personalized group saw a picture of Boston instead of a generic workplace image that is typically used in the hero. Success was based on the click-through rate on the hero image.

	Times shown	Clicks	CTR	Significant? http://getdatadriven.com/ab-significance-test
Default	150	54	54/150 = 36%	Yes
Personalization	150	85	85/150 = 57%	

Recommendations and next steps: The personalized content received more clicks than the default content. We recommend expanding the personalization so 95% of the entire Boston segment will see the Boston personalization (the rest of the audience will continue to see the default content). We will also create similar tests for other key cities, starting with Seattle and DC.

Examples of Success Metrics

There are many, many metrics that can be considered to evaluate the success of a personalization campaign. Some metrics, like sales for a B2B company, might take months or years to determine. There are other metrics that will need to be interpreted based on the action. We typically think that “bounce rate” should be low; but if you are personalizing a FAQ page to help visitors get answers more quickly, than having a high bounce rate may not be a problem. Regardless of the metrics you use, it is important to have benchmarks and trends to evaluate progress toward your goals.

Below are some typical metrics and guiding questions that you might consider when evaluating the success of a personalization campaign:

- Click-through rate: Is it higher than average CTR on that page or the average CTR in that slot?
- Video views: Did more people watch these videos than usually watch videos on your site? Do these people watch more of the video than average?
- Time on site: Did visitors in the personalization stay longer on the site than average?
- Bounce rate: Was bounce rate impacted by the personalization?
- Form completion: Do the personalizations have a better-than-average rate?