



nice to meet you.

an introduction to clearhead's personalization maturity model

what does this personalization journey look like?

transformational

Tool ownership and governance is centralized, but operational control of personalization shifts to a federation of groups within the org. Using true omni-channel data you can test and personalize everything with confidence. Desire for personalization is baked into DNA of all teams.



impactful

Doing everything in operational phase but there is now a trust built within the organization that allows the Center of Excellence to drive efforts. You have a strong roadmap that is defined by researching the biggest problems. The constraint for fully realizing personalization strategy is a lack of resources to support the personalization efforts of the whole organization.



operational

There is a Center of Excellence that has built process and strategy around personalization, but it is not driving that internally due to not having full trust from the rest of the organization. People that drive or test features often go around the COE rather than through it. Personalization is being done through a standardized process and with governance in place, but still exists on a smaller scale.



emerging

Testing and personalization have a key owner. There are some processes and light governance in place. Desire is spread to more people. You've got some full-time people. Tool is there with dedicated people behind it. Experiments are defined by a small number of people.



traditional

An executive or director is thinking about buying a testing/personalization tool or has just bought one. You know you don't have people and process to execute. You have some part-time people and resources to experiment. Desire is present.



operational maturity

traditional

emerging

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audience discovery (who are they?)

Discussion around customer audiences (personas) but no personas have been developed.

Marketing personas exist. They've not been heavily validated with actual data and research.

Personas are understood and use a broad set of attributes across demographic, psychographic and behavioral categories.

Data science techniques and algorithms are employed to analyze correlation and causation between persona attributes and key performance metrics.

Personas are well understood across channels, validated with data, and prioritized for investments in personalized experiences.

audience data supply chain (where are they?)

Basic web analytics implementation, lacking data to support audience segments. Data is often not fully trusted.

Data for personas beginning to take shape, but still siloed. Integrations across channels (web, mobile, email, POS) begin to develop.

Trusted data. Silos still exist but are beginning to break down. Third party data is in place to supplement first party data.

First and third party data is stitched together into a single, cross-channel view of the customer. Ability to take action in near real-time is limited.

You can identify and map people across channels in near real time and leverage it.

audience experiences (what am I doing with it?)

Customer experiences are primarily "one size fits all".

Manual personalization is being done on a single channel using black box solution. Experience is not being measured against a control.

Experiences are now being measured for impact and a strategy for prioritizing problems is in place instead of ad hoc dabbling.

Experiences are now expanding beyond a single channel, which is usually the website, and are now provided on multiple channels.

All channels are leveraging single, cross-channel profile to target personalized experiences.

technology (tools)

A point solution or two is being considered or has been purchased. These are often "black box" in nature. Ex: product recommendation widgets

Point solution is implemented with a single channel focus.

Alignment between point solution and analytics tools to provide measurement.

Moving away from point solution. Starting to engage with outside experts to drive strategy + process.

Multiple departments are engaged and allocating resources / training on tools. Engaging with outside partners / experts.

organizational maturity

traditional

emerging

operational

impactful

transformational

culture (hive mind)

The idea that everything is an experiment and can be measured does not exist.

A concentration on putting the customer first when it comes to UX starts to form.

Culture starts to realize the benefits of a “customer first” focus and the effect on UX.

Perception has changed to understand that every UX change can be tested.

The customer journey is at the core of every change, an overall test and learn attitude.

desire (want to change)

Ambivalent to the idea of a personalization program.

One group inside the organization (analytics) starts to see the impact.

Multiple departments (in silos) start to see the impact of personalization work.

Cross departmental personalization starts to happen and prove results.

Teams beyond ecommerce, UX, Creative and Site Ops are interested. Opt in.

people (skills + accountability)

One to two optimization employees are treated as doers. Exist only in analytics department.

Mavericks break through. Product teams and Site Ops start to engage.

A larger, empowered central team is run by a proven leader. Creative/UX starts to engage.

Central team exists, but execs are brought in more and more. Key roles are filled.

Coordinated cross-department teams determine what to test, operate on unified methodology.

process (mapping of the work)

No process exists. Those who do the work control all the information. No opt in.

Process starts to develop. Light governance forms. Leaders emerge.

Process has to be in place to scale. A testing roadmap exists and test plans are shared.

Testing roadmap is defined by research. Biggest problems are identified.

Clear RACI in place across departments. Roadmap is prioritized and reviewed by quarter.



thanks, reach out any time!

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