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The Do's and Don'ts of Personalization

A Cheat Sheet

The amount of personal data available on the average consumer is staggering. Facebook boasts over 3.5 billion profiles[1] across its apps. Data companies report[2] having anywhere from 3,000 to 90,000 individual attributes on file about consumers.

But a business's first-party data is increasingly valuable as data privacy laws, browser restrictions and consumer privacy tools gain ascendancy. This data offers a treasure trove of personalization potential. From who the customer is to their interests to their buying behavior, you can customize your message for every individual to make it more effective. And modern technology lets you do it at scale, even for millions of customers.

However, personalization is only effective when used strategically. We're talking about meaningful personalization, not just dropping in customer data for its own sake or tacking on the recipient's first name to an otherwise generic message.

How do you do it? As with most things, there's a right way and a wrong way. This cheat sheet covers both: what you should — and shouldn't — do when it comes to personalization.

When to Personalize

Do **personalize early.**

Putting personalization front and center lets your customer know right away that something is different. That increases the likelihood they'll stick around to hear what you have to say.

Example:

Add the customer's first name early to any visual content you want them to click. You might even clearly say it's personalized, like Mr. Cooper does in this explainer video.

TOP AGENTS

72% ORE SALES
93% OF ZIP CODES AVAILABLE

Source: NAR 2018 survey participants reported median transactions of 11 for the year. MLS data for all agents in the Mr. Cooper Real Estate Rewards panel for same time period shows median transactions of 19.

Don't make your early personalization vague.

There are so many ways to personalize, but when you're deciding what to put first, it's not the time to be subtle. If you use something that isn't obvious it's personalized, the customer may not realize you created something unique for them.
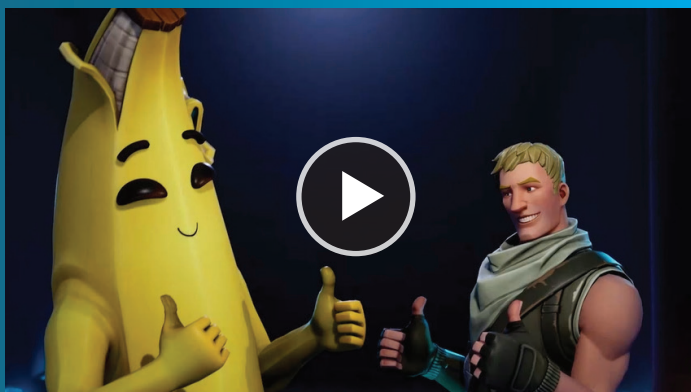
Example:

Your customer is in Michigan, so you open with how it's going to be a chilly winter (maybe a great time for your product or service). But even though it's relevant, it doesn't clearly indicate it's personalized for them.

Do personalize throughout, using data to tell a unique story.

So often, marketers think personalization stops with a first name. True personalization tells a story that changes depending on the person it's about. And no two stories are the same.

Example:

In gaming, you have players with record-breaking wins and those who struggle to get past level one. The first group will love a shareable highlights reel like the one here, which Fortnite personalized for millions of players. The second group might appreciate some tips (along with a highlights reel) that show them how to improve.

Don't play personalization Mad Libs.

You can't tell the same story to every customer, simply replacing data points like names, numbers or purchase history. Use logic to define what each viewer sees.

Example:

A bank shouldn't send overdraft protection info to a customer with $1 million in their account. And they probably don't need to send investing advice to someone with $50 in checking. This is a great opportunity for dynamic content. Show the appropriate scene to the right person.

Do start small.

The idea of true 1:1 personalization can be overwhelming. But it doesn't have to be. Start with the data you have that's easily available and also relevant.

Available data

Data for personalization

Relevant data

Example:

Include their first name and congratulate them on their 1st, 5th or 23rd anniversary of being a valued customer. Tailor the message differently if they're new customers — perhaps offering tips for how to get the most out of your service — versus longtime fans. Even with just 2 data points, that's a thoughtful, personalized message.

Do reward your customers personally.

Personalization lets you wow your customers and turn them into brand advocates. Leverage personalization throughout the customer journey to improve retention. Better yet, make something they'll want to shout about on social media.

Example:

Share a recap of how loyalty club members have benefited from being part of the club, like Delta did with their personalized year in review.

YOU FLEW UP FRONT
DELTA PREMIUM SELECT : 1 TIME
FIRST CLASS : 1 TIME
DELTA ONE : 1 TIME
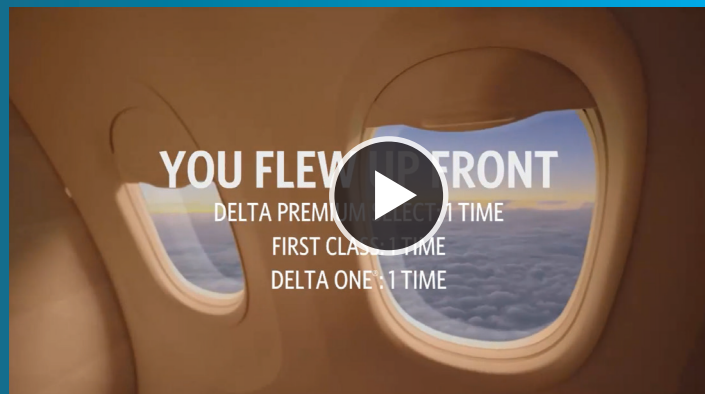
Don't only reach out when you want something.

If a customer begins to associate all communications from you as a sales pitch, they'll quickly tune you out. Instead, stay in touch with personalized recommendations, recaps, rewards or even a simple thank-you.

Where to Personalize

Do **personalize video content.**

Video is by far the most popular form of digital content. It makes up around 80% of consumer internet traffic,[3] and Gen Z, the newest generation of consumers, is driving even more demand for it. But video is no longer the one-size-fits-all medium of the early 2000s. It can be personalized at scale as easily as text by using a Personalized Video platform.

Example:

Watch this video from Petplan with personalized details about the customer's coverage (and even the personalized name of their pet)!
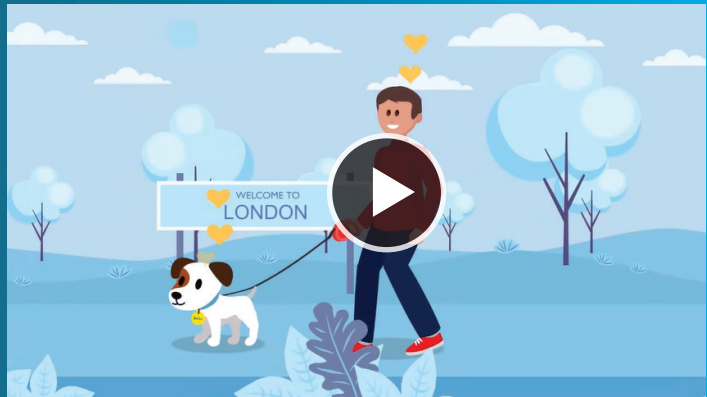
Don't **only personalize emails.**

Personalizing an email greeting is fine, but it isn't deep or meaningful personalization. People have seen this in their inbox for years — they know a generic message is about to follow. Personalization is about adding value and a personal touch to the brand-customer relationship, so make sure your personalization strategy expands to the entire customer experience.

Do **integrate personalization across all platforms.**

We live in an omnichannel world. Consumers switch seamlessly between platforms, which means your personalized content needs to do the same.

Example:

A brand with a personalized app experience should incorporate personalization throughout their CX, from onboarding videos to digital tools for customer service.

How to Personalize

Do maximize cross-selling and upselling based on customer needs.

The oft-quoted example is related products on Amazon. Note that you don't need to only suggest items similar to what the customer already bought. You can recommend products or services that would enhance their experience from a past purchase.

Example:

Utilities provider National Grid recommended a new heat pump system to help customers save on their electricity bill. The suggestion was well-timed, coming right after a personalized recap of the customer's energy use.

National Grid can help you upgrade to a state-of-the-art heat pump system
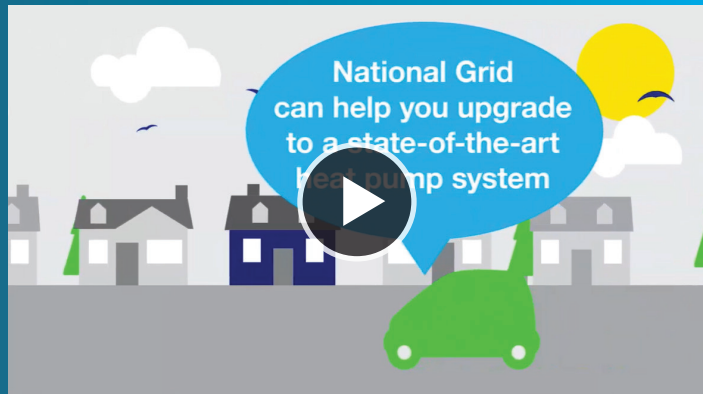
Don't use personally identifiable information.

Leave off the customer's last name. Use zip codes instead of street addresses. And of course, you should never share sensitive information like passwords, credit card details or social security numbers.

Example:

Share the nearest store where they can grab their deal (based on their address), but don't give door-to-door directions.

Do prioritize data security.

Cisco reports[4] that a third of consumers have stopped doing business with an organization due to data privacy concerns. Even if it weren't essential for consumer trust, security is always a top priority when it comes to customer data. If you

ISO 27001 Information Security Management Certified

work with a personalization vendor, make sure they have credentials to show, such as an information security management certification from ISO, and experience following stringent security standards.

Do add thoughtful personalization to support your overall message.

When personalizing, ask yourself if that piece of data is helpful. Personalization should either help you connect better (adding a human touch, like congratulating new home-buyers) or helping the customer get important info (like learning how to make an insurance claim).

Example:

Share a step-by-step guide to how your customer can earn a cash bonus. That's what Chase did in this personalized tips video.
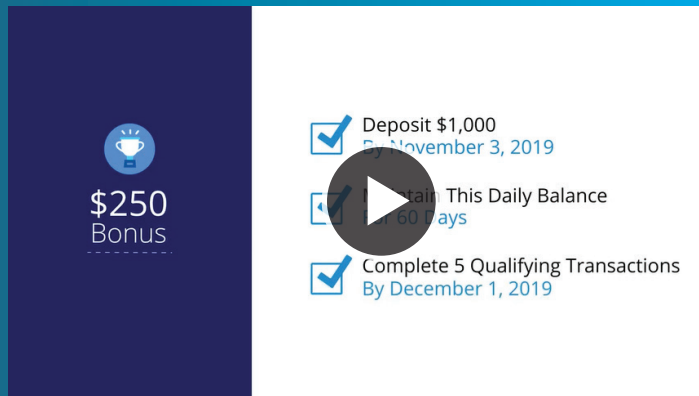
Don't over-personalize.

Just because you know your customer's full name, every purchase they ever made from you and the last three places they lived doesn't mean you need to surface that data in a marketing video. Leave out irrelevant data so you don't come across as creepy.

Example:

Don't say, "Hi John. We have a vacation package that you, Susan and 7-year-old Tommy are going to love." Be thoughtful about the data you use.

Do add personalized CTAs.

Your message should always have a next step. If it's customer service, show them how to get the answers they need. If it's upselling, let them click to buy. Having fewer clicks helps you avoid customer drop-off.

Example:

See how the closing scene from this video by Celebrity Cruises has a clear call to action. The offer is also related to the traveler's recent cruise experience. Like a web page, videos can be interactive, so be sure to add clickable elements to drive deeper engagement and conversions.

Personalization Cheat Sheet Recap

As you can see, there's an art behind effective personalization. It comes down to knowing what you want to achieve and understanding your customer.

To review, here's a quick look at the do's and don'ts of personalization.

✔ *Do* personalize early so your customer knows you've created something just for them, but *don't* make that first example of personalization unclear.

✔ *Do* use data to drive the story.

✘ *Don't* just plug in data points to the same story for every customer.

✔ *Do* start small with the data you have that's relevant.

✔ *Do* create personalized content that rewards customers and is shareable on social media.

✘ *Don't* reach out only with sales offers.

✔ *Do* personalize videos to take full advantage of this engaging medium.

✘ *Don't* make the mistake of thinking personalization is limited to email.

✔ *Do* take an omnichannel approach to personalization.

✔ *Do* maximize cross-selling and upselling based on the customer's needs.

✘ *Don't* include personally identifiable information.

✔ *Do* prioritize data security.

✔ *Do* add personalized details like when their next bill is due or the rewards points they've accumulated, but *don't* be creepy.

✔ *Do* add CTA to make your personalized content actionable.