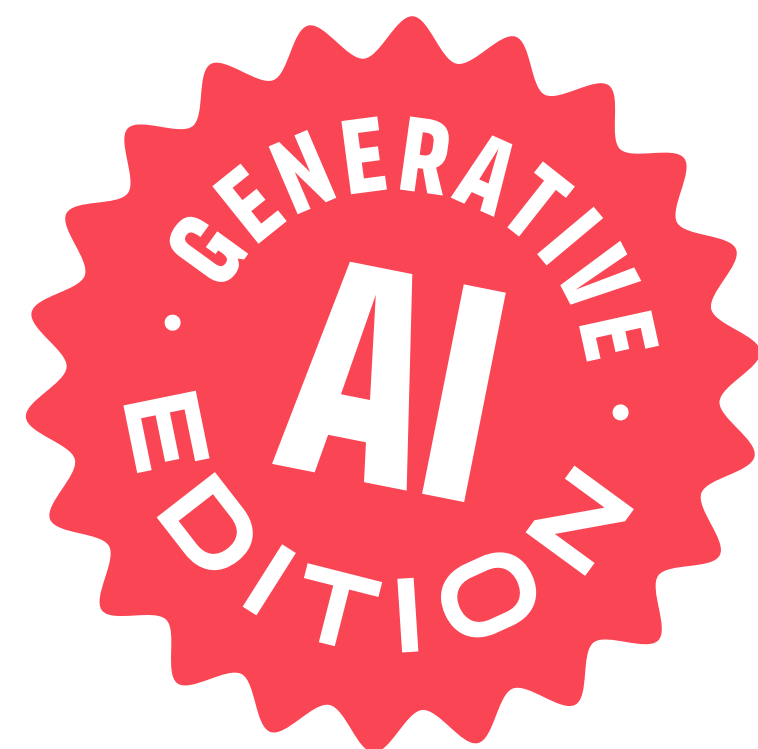


EVER HAD TO TIE A BOWTIE?
PERSONALIZATION CAN BE JUST AS HARD.
THIS BOOK HELPS YOU MASTER IT –
AND SHOWS HOW GENERATIVE AI IS
RESHAPING BOTH THE CRAFT AND
THE ORGANIZATIONS BEHIND IT.

HELLO \$FIRSTNAME PROFITING FROM PERSONALIZATION



RASMUS HOULIND
& FRANS RIEMERSMA

HELLO \$FIRSTNAME

PROFITING FROM PERSONALIZATION

GENERATIVE AI EDITION

RASMUS HOULIND

FRANS RIEMERSMA

ARILD HORSBERG

MATTIAS ANDERSSON



**OMNICHANNEL
INSTITUTE**

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ADVANCE PRAISE

“Personalization in marketing has always been a challenge and with generative AI now in the mix, the opportunities, challenges and complexities are greater than ever. Hello \$FirstName is one of the best guides to help you navigate this evolving landscape, identify pitfalls and design the strategy you need to succeed. An indispensable guide for the modern marketer!”

- FREDRIK MCCARTHY, DIRECTOR, GLOBAL MARTECH,
AUTOMATIONS AND CRM FOR HBO MAX, WARNER BROS.
DISCOVERY

“Hello Firstname is the book I wish I’d had when I first stepped into personalization. Now updated for the gen-AI era, it shows how to scale impact and why content matters just as much as data. The new CX Layers framework is gold, and the personalization cards? Perfect for sparking ideas with your team. This is a smart, practical book, written with a playful twinkle in its eye. Well done!”

- MARIA MOREAU, CRM DIRECTOR, BOOZT

"Hello \$Firstname has become a defining resource for understanding personalization in large, complex organizations. This new edition recognizes just how dramatically the landscape has shifted with generative AI. It combines timeless wisdom with cutting-edge practice. A must-read for any leader navigating personalization in 2025."

- JUAN MENDOZA, CEO, THE MARTECH WEEKLY

"Hello\$Firstname is an invaluable resource for anyone looking to understand and implement personalization and generative AI. With clear explanations, practical tips, and inspiring case studies, the updated version demonstrates how AI can transform personalization into a dynamic and effective superpower boosting engagement and customer lifetime value."

- BRIAN ANDERSEN, EVP, GROUP DIGITAL & LOYALTY,
MATAS GROUP

"A long-awaited, essential guide for marketers aiming to crack the code on profitable personalization of customer experience. Maximizing return on investments in marketing automation, personalization technology, AI and data is not only about doing things right, but also about doing the right things. This book is inspirational in both areas."

- NICK MASCA, EX HEAD OF DATA SCIENCE FOR GROWTH &
PERSONALISATION, M&S

"Everyone working in marketing, CRM, Loyalty and customer engagement roles knows that generative AI is the future of the industry. But what does that actually mean!! How do we use generative AI to create hyper-personalization in real-time and at scale? The answer is in this book.... Rasmus's CX Layer model clearly explains how data and content work together to create hyper-

personalization. Hello \$Firstname is a must read for any marketer interested in how to engage the future customer.”

- TOM PEACE, CEO & FOUNDER, SWAY OUTCOMES

“Generative AI is turning hyper personalization from hype into reality. Hello \$Firstname shows marketers how to seize this moment - transforming AI’s potential into one-to-one experiences that truly connect with customers.”

- FRANÇOIS-YVES CAYA, DIRECTOR OF MARKETING AND CUSTOMER STRATEGY , DESJARDINS GROUP

“AI offers us endless possibilities – but without the right strategy, it’s just noise. Hello \$FirstName shows how data, creativity, and technology can come together in genuine personalization that both delights customers and drives the bottom line.”

- MARIA DABELSTEEN, CCO, ALLER MEDIA

“Personalization is crucial, yet tough to master. This book is a practical guide for anyone aiming to tell customers what they really want to hear. In the age of AI it is easier than ever. Read it if you want to level up your marketing career!”

- ZSUZSA KECSMAR, CO-FOUNDER & CHIEF STRATEGY OFFICER, ANTAVO AI LOYALTY CLOUD

FOREWORD (1 OF 2)

“It’s not personal, it’s strictly business.”

That may have been a famous line from *The Godfather*, an iconic crime family saga. But for me, cheekily dubbed “the godfather of martech” by *Ad Age*, it’s the antithesis of iconic marketing.

Sorry, Don Corleone, but not being personal is bad business.

There are very few things that people buy without some sense of connection. Do you have a preferred brand of toilet paper? Even such a humble, commodity product that is destined for disposal down the drain engenders more than a modicum of brand loyalty.

Why? Maybe growing up, it was your parent’s brand of choice. Maybe their advertising made you laugh or smile, even from a campaign run years ago. Maybe it was the last package on the shelf at an island convenience store that saved your butt - literally - on that memorable tropical vacation marred by a memorable tropical stomach bug.

But somewhere, a connection was made. A spark happened. And now you consistently hand over your toilet paper budget to that firm every time you restock your bathroom closet.

It’s personal. And that’s just toilet paper!

Most of the products in our homes and in our work have much greater meaning and value to us. They're less commoditized and more differentiated, with a vastly broader and deeper landscape of potential preferences, connections, and loyalties. Some are emotional or impulse purchases. Others are highly rational - or at least rationalized - choices. But even our most logical buying decisions are influenced by moments of personal resonance. Great marketing creates that resonance.

Personalization - creating individualized resonance at speed and scale - has been the Holy Grail of digital marketing for three decades. Emails, web pages, online ads, mobile banners, SMS texts, call scripts, etc., are infinitely malleable at near zero marginal cost. And technically speaking, modifying digital content or code is easy. It's just bits being changed on a screen. The hard part is deciding what to change those bits into. Aye, that's the rub.

For most of the past three decades, the quest for personalization has been more Quixotic farce than Arthurian epic. We had precious little data - at least little we could trust - about our customers. We had limited raw materials of content components that we could synthesize into tailored experiences. Or, if we had good customer data and content components somewhere in our organization, our ability to find it, understand it, pipe it to the right touchpoint, and act on it in the moment was often beyond our grasp.

At long last, the Grail is within your reach. Hello, `$FirstName`, now revised and expanded in its second edition, will guide you through the strategy, architecture, and implementation of truly personal personalization in your marketing and digital experiences. Rasmus Houllind and Frans Riemersma, world-class experts in the field, will show you how to design and deliver resonance that is timely, targeted, and tailored.

These authors know being personal is serious business. And they've made it their personal mission to help you. That's an offer you shouldn't refuse.

Scott Brinker

Martech Analyst-at-Large

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FOREWORD (2 OF 2)

When Rasmus and I met at the Optimizely Roadshow in London early 2025, our conversations quickly uncovered a shared belief: while technology continues to transform how brands engage with customers, the true differentiator is still the *quality* of those interactions. Whereas we've spent our careers with different lenses on personalization – Rasmus's looking at the core and mine focused on data, customer experience, and now digital experiences and content – we both recognized how personalization has evolved dramatically and how in the past couple of years it's finally become ready to fulfil its promise. It's no longer just about data or segmentation models – it's about how you leverage them to serve up the most relevant content.

That's why this second edition of *Hello \$Firstname* feels so timely and important. It doesn't just revisit the personalization conversation; it reframes it. For too long, our industry has treated data as the primary (and sometimes only) engine driving personalized experiences. I saw this first-hand throughout my time at Power BI and Tableau. Data is foundational, of course. But now that I'm at Optimizely, with a courtside seat to personalization, it's very obvious that without thoughtful, contextual, and scalable content presented at the right moments, even the best insights fall flat.

AI has only accelerated this dynamic. Today, AI allows us to uncover data insights, including segments, and predict moments of truth in ways that were unimaginable just a few years ago. And AI can generate content at scale. What remains elusive for many brands, however, is how to operationalize that content – how to manage it, govern it, personalize it meaningfully, and deliver it in the right moment, through the right channel, with the right message. By now, most companies have some sense of what to do with their data, even if they haven't mastered it. But the content layer is where many personalization strategies start to unravel. And that's the challenge this book addresses.

What I appreciate most about Rasmus's framework is how it brings together all the critical aspects required for personalization. It's not just about what happens in a single moment, but what leads up to it. When my colleagues and I worked together on customer journey mapping at Qualtrics, we learned that retention didn't begin after onboarding – it started during implementation. 'Moments of truth', which drive customer satisfaction, often trace back much earlier in the journey than you expect. Those early moments shape customer perception and long-term outcomes. The best personalization frameworks account for this, connecting data and content in a way that reflects the true complexity of human desires and expectations.

In my years leading product teams across these disciplines, I've seen personalization evolve through a data-first lens, a CX-first lens, and now a vital content-first lens. But nothing has accelerated that shift like AI. It's exciting, and overdue, to see a framework that treats data and content as equal partners in delivering the kind of deeply personal, highly relevant experiences today's customers expect.

As you read this book, I'd encourage you to keep a few of your organization's real personalization challenges in mind. Identify one to three of these and test them against the ideas Rasmus and his co-authors outline here. Doing so will make the takeaways far more practical and actionable.

– *Rupali Jain, Chief Product Officer at Optimizely*

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INTRODUCTION

The title of this book, *Hello \$FirstName*, is a reference to what could very well be the most common example of personalization in the world: the salutation often used in an email or a LinkedIn connection request. At the time of writing, nearly two years after the first edition of *Hello \$FirstName* saw the light of day, it feels a bit funny to read those lines again. Back then, personalization was still a divisive topic – some hailed it as the future of customer experience, while others criticized it as invasive or unrealistic at scale. The biggest challenge was proving that personalization could be done efficiently, that it wasn't just a pipe dream but a tangible way to create meaningful connections between brands and customers. In 2025, somehow, it's no longer necessary for brands to justify why they want to work with personalization. Everybody seems to understand that personalization is much more than putting someone's first name into the opening line of an email.

Obviously, something happened that no one could ignore – ChatGPT was launched and was suddenly on everyone's lips. Generative AI became the next big thing. Like many, my co-authors and I recognized that something significant was unfolding, but we couldn't yet foresee its full impact. What we did realize, however, was that it would change how we think about personalization. Looking back two years later, it's almost ironic – where personalization once faced a long fight to overcome scepticism, generative AI has quickly made its benefits evident. Why? Because it solves the very

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problem that has long hindered personalization at scale: the content crisis. Suddenly, the challenge wasn't whether personalization could work but how quickly businesses could adapt to this new reality.

At first, the real-world applications of generative AI in personalization were scarce. Half a year after ChatGPT's release, we started looking for examples of how generative AI was being used to personalize experiences. To be completely honest, we didn't find many. The few that existed often didn't scale well, and in some cases the outputs were questionable. But one thing was immediately clear: we no longer had to start from scratch. Writing anything (even a silly song for somebody's birthday) no longer meant facing down a blank page – it became about prompting, refining, and optimizing AI-generated drafts. Although the first major AI breakthroughs focused on static content – landing pages, product descriptions, search engine optimization (SEO) text – the foundation was laid. And that has changed everything.

Generative AI or not, the seasoned marketer still knows that successes don't create themselves! They require hard work from a lot of people collaborating on the relevant technology (of which there is definitely no shortage). But successfully working together on harnessing these new opportunities requires a common language and understanding, as well as clear goals. And with personalization being such a wide topic, this creates a lot of confusion, which leads to misunderstandings, and this in turn leads to personalization projects that are doomed to fail from the get-go, with all that entails in terms of broken promises, shattered careers, lost potential, and wasted money. In sharp contrast to what is actually needed, many marketers seem comfortable with only a semi-clear definition of personalization and nevertheless happily use the term believing they understand its meaning and potential, and what it takes to achieve it.

It's important to understand that, thanks to the shift from producing content to prompting and doing quality assurance, the skills marketing departments need have radically changed. Those who built their identity around crafting every word, illustration or image from scratch will need to rethink their role. Creativity is still crucial (perhaps more than ever), but it's no longer about starting from nothing – it's about steering AI, applying strategic thinking, and ensuring quality. AI is an incredible assistant, but it

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still needs human direction to generate meaningful, brand-aligned content that resonates.

This book is for all marketers working with personalization – and thus also generative AI. It aims to help you get a clear understanding of the concept and share this with your team, to ultimately create better results with the resources at hand. The first and second parts of the book focus on understanding the concept in detail and will be helpful for marketing practitioners of all levels. The last two parts focus on the prerequisites as well as the organizational foundation of personalization and will be particularly helpful to marketing leaders and CEOs wishing to guide their organization towards creating the best possible customer experience.

More precisely, this book's first goal (the focus of *Part One*) is to create a common definition of personalization that anyone within the field will be able to comprehend. Using this definition, you should be able not only to identify your own perspective on personalization but also to clearly see its shortcomings and what you are missing. This will allow you to fully grasp the concept and reap the potential benefits, or at least avoid unfortunate mis-investments.

To help us get closer to a common definition, we held dialogues with more than 90⁶ people working within digital marketing and personalization around the world (see the authors' note below). These people helped us to define the problem and later the solution that you are now starting to read. We'd like to thank these people for feeling our pain, for giving us their perspectives again and again, and for participating in roundtable debates and interviews that helped us to get closer to a common perception and a model we can all use.

In *Part Two*, we move on to consider the main model of this book. Through countless examples from companies across a variety of industries, we developed our main model for understanding personalization: the Bowtie of Personalization. In *Chapter 6*, we explain how the underlying parts constitute a model for personalization that brings clarity to the (m)admen of our time and the media buyers, the customer relationship management (CRM) managers, and the website and ecommerce managers alike. The practitioners we consulted found the metaphor strikingly helpful, but we also acknowledge its primarily masculine connotations. If you

are more comfortable thinking of a bow, then please do so. The logic still applies.

Chapters 7, 8, 10, and 12 go deeper into the four corners of the Bowtie of Personalization: segments, messages, moments of truth, and content feeds. If you are new to personalization, this model will give you a detailed understanding of the topic. If you are already a skilled practitioner, you will most likely find the model both intuitive and easy to understand. Its purpose is to anchor your team conversations around personalization and help you to establish the optimal conditions for working together in this area. It will especially be useful for getting new team members on board and up to speed in terms of understanding personalization. The Bowtie of Personalization brings clarity to the ‘what’ of personalization.

New to accompany this edition of *Hello \$FirstName* is a set of Personalization Cards. Use these as a tool when you’re ideating and creating personalization projects with your colleagues and partners. The cards feature best-practice examples of the segments, messages, moments of truth, content feeds, and even touchpoints. Download them at www.omnichannelinstitute.com/resources. You can then print them, cut them out, and use them to get your imagination and creativity going. A pure digital version also exists that we’ll link to later.

The second goal of this book is to show what it is that makes personalization profitable in each of the major marketing disciplines. To do this, in chapters interspersed throughout *Part Two*, we’ll demonstrate how different parts of the model play the main role depending on the marketer’s agenda: building campaigns (*Chapter 9*), automating marketing (*Chapter 11*), and meeting customers on inbound platforms such as websites and apps (*Chapter 13*). In other words, taking into account the specific use case and the medium, what should you as a marketer focus on to succeed with personalization? What are the levers you can pull in order to maximize profit in both the short term and the long term, and in which order should you pull them? The findings are summed up in a maturity model that we call the Pyramid of Personalization. This model explains the ‘how’ of personalization. More specifically, *Chapter 14* focuses on maturity within the personalized communication that the customers experience. In other words, it sums up three maturity levels for the *scope* of work that you

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produce to deliver personalized customer experiences. This is the front end of the pyramid.

On the back of a newly found nuanced view of the topic of personalization, *Part Three* then explores the prerequisites for personalization, such as how well your core business performs, how well you've established brand awareness and brand trust, and how well you can access customer data. As a by-product of this exploration, we'll also consider who personalization is *not* for and hopefully honour the sceptics a little.

This part is especially meant for marketing leaders, who will inevitably face demands from senior management and employees alike. It serves as a reality check as to whether personalization is the right tactic for your business at all at this given time. Use it to fend off impatient senior management colleagues with unrealistic expectations or to get the funding you need to put the basics in place.

In *Part Four*, we'll explore what it takes to succeed with personalization from an organizational point of view. Answering these questions is the third goal of the book: how can skills, technology, and governance work hand in hand to make personalization possible? And how can you manage this process sustainably with proper governance? The three main resources – skills, technology, and governance – will be visualized across three maturity levels. These three levels constitute the back end of the Pyramid of Personalization.

This last part of the book is especially for you if you are a marketing leader with an omnichannel customer profit-and-loss responsibility and if personalization is well anchored among your senior management. It will give you guidance as to how you can manage personalization optimally at the macro level. Lastly in this part, we'll consider how to break through the glass ceilings that exist between the three maturity levels of the Pyramid of Personalization.

We do hope and believe you and your teams will find this book both helpful and entertaining.

AUTHORS' NOTE ON THE PROCESS

This book is not only a result of academic desk research. To make sure the concepts and models would be usable by real practitioners and strategists, approximately 90 people helped to evaluate the book's content and models. Countless interviews were held with experts from all over the world. Moreover, a series of six expert panels of practitioners from the three Nordic capitals (Copenhagen, Oslo, and Stockholm) met to discuss, criticize, and suggest changes to the models and concepts and to supply their knowledge of case studies to learn from. See the acknowledgements (at the back of this book) for a full list of the people who participated and helped this project come alive.

Since the publication of the first edition, we've also had the pleasure of hearing from countless practitioners from all over the world who've encountered our models and the Bowtie of Personalization for the first time. This has helped to prove the usefulness of the framework. In turn, we've developed and presented views on generative AI that build on what we outlined in the first edition. Furthermore, our models played a central part of season two of the Hello \$FirstName podcast,¹ and we've presented in front of industry experts from the Nordics, Europe, and Australia. We took all this feedback into account in developing this updated edition of the book.

THE NORDIC NEED FOR EFFICIENCY IN PERSONALIZATION

While we've presented and validated the framework of this book worldwide, it's no secret that the authors, the contributors, and the case studies have their centres of gravity firmly in the Nordics. We realize this means that some of the examples may not be considered household brands by overseas audiences. With the modest population size of the Nordic countries, a rather large customer database often contains no more than 1–2 million customers. This means that all personalization efforts must be built with great efficiency in order to become profitable. The authors firmly believe that this need for efficiency, as well as the general digital maturity in the region, provides valuable lessons for all practitioners – especially those operating in larger markets, who should be able to leverage these lessons to reach unseen heights due to the sheer scale of their databases.

NOTES ON THE CASE STUDIES USED

To give the reader a feeling for how a practitioner thinks and which considerations go into creating a sustainable personalized customer experience, we've chosen to start most of the chapters in the book with case studies in the form of narratives. These narratives aren't meant to be 100% factual representations of past real-life situations. However, they are all rooted in the practice of the represented organizations and as such they *could* have happened as they are presented here. The people featured within the narratives are all real people and have participated in the creation of the narratives.

We are aware that the supplemental case studies have a preponderance of companies using Agillic as their marketing automation technology. This is a natural consequence of the main author's affiliation and the popularity of this platform in the Nordics but has no impact on the theoretical points made or the potential results that can be obtained with this or any other comparable technology.

ALL MODELS AND ILLUSTRATIONS ARE AVAILABLE AS DOWNLOADS

As a natural part of democratizing success with personalization and spreading the concepts and thoughts from this book to all practitioners, the authors encourage anyone interested in the topic to download the models and illustrations from the book on www.omnichannelinstitute.com/resources.

PART ONE

WHAT IS PERSONALIZATION?

CHAPTER 1

THE HYPE OF PERSONALIZATION

For us, at least, the personalization hype started way back in 1993, when Don Peppers and Martha Rogers published *The One to One Future*.¹ Could we get to a place where all communication was individualized, or what is now called ‘hyper-personalized’, for each customer? A place where no one saw the same offers and messages? Surely that would be a good place where consumers would be happy and brands could make a lot of money?

Working in digital marketing before 2010 mostly meant building websites and ecommerce solutions. Advertising on Google was still fairly simple and direct marketing was mostly a matter of putting letters in envelopes. So, the fact that Peppers and Rogers envisioned a ‘one-to-one future’ as early as 1993 seems incredible.

In a personal conversation with one of the co-authors of *Make It All About Me*,² Colin Shearer, Peppers later shared how he and Rogers had thought of the book as a piece of ‘mar-fi’ – marketing fiction. At the time, they saw the one-to-one future as a very distant one – if it would ever be possible at all. Clearly, personalization was in its very infancy in 1993. Still, the thought stayed around.

CONSUMERS *EXPECT* PERSONALIZATION – AND BRANDS HAD BETTER DELIVER

Fast forward to McKinsey's *Next in Personalization 2021 Report*.³ According to this study, 71% of consumers expect brands to deliver personalized interactions and 76% get frustrated when this doesn't happen. Does this mean that the one-to-one future is here, or at least that consumers believe it should be? Then we'd better get to work. In fact, a lot of marketers already are. We like to believe that the very soul of personalization – where the customer experience is tailored to each individual – is what appeals to many marketers due to it being more pleasant and presumably less annoying for the customer. But clearly there is a lot of money in personalization – for brands and tech companies alike.

The McKinsey report concludes that digitally native direct-to-consumer companies on average can attribute 25% of their revenue to personalized communication.⁴ A 2022 study by Forrester Consulting, commissioned by Agillic, furthermore showed that so-called leaders in the field of personalization are twice as likely to see 10% or more annual growth in revenue.⁵

In our daily work, we constantly encounter companies and clients for whom personalization has made a significant difference. An example of this is the online fashion marketplace Miinto, which has seen its customer lifetime increase by as much as 31%.⁶ In another example, the Danish health and beauty retailer Matas is using personalization and omnichannel marketing to increase the number of its omnichannel customers (customers shopping both online and offline). These customers are nearly worth twice as much as their single-channel peers.⁷

THE TECH HYPE OF PERSONALIZATION

Every year since 2012, Scott Brinker from Chief Martec has put together an overview of marketing technologies within multiple categories (see *Figure 1*).⁸ This overview is called the Marketing Technology Landscape or the Marketing Technology Supergraphic. Since 2021 the landscape has been put together with help from Frans Riemersma and his company, MartechTribe.⁹ The growth in the number of named technology vendors in this landscape has been immense, from approximately 150 providers in

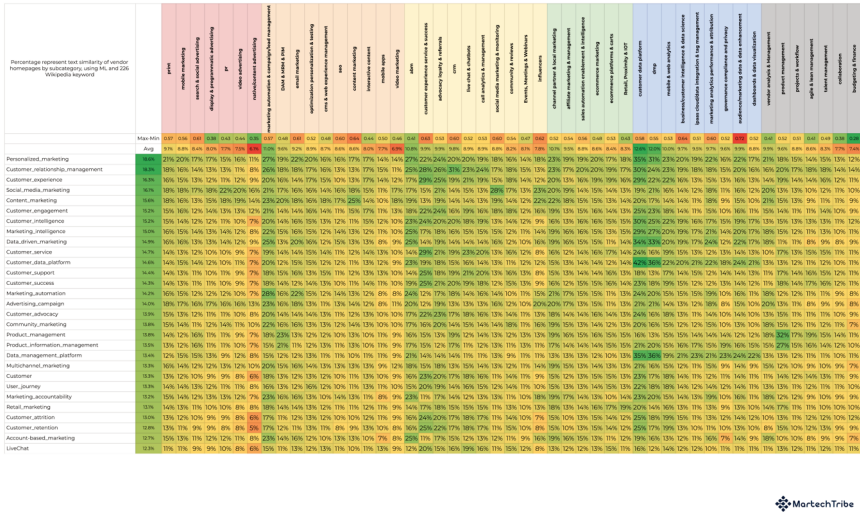
THE HYPE OF PERSONALIZATION

2011 to 14,106 providers in 2024. This is an increase of 9,304%. Generative AI has played a large part in the latest growth: 27.8% from 2023 to 2024 alone. Obviously not all of these providers have solutions for personalization, but 17 of the 49 categories in the landscape are closely related to the topic.



Figure 1. The Martech Landscape from 2011 to 2024, showing a growth of 9,304%

MartechTribe has also been looking more closely at which keywords (or even buzzwords) technology providers emphasize on their homepages. In 2022 they researched 226 marketing keywords sourced from Wikipedia and the global review platform G2 Crowd, and mapped them against 10,000 martech vendor websites (see *Figure 2*). Guess what – ‘personalized marketing’ was top of the list.¹⁰



MartechTribe

Figure 2. An overview of the most used marketing keywords across 10,000+ vendor websites: 'Personalized marketing' comes in at first place. Source: MartechTribe.com

We're pretty sure most marketers would concur that these homepages make it appear incredibly easy to get insanely good results by using personalization.

HAS PERSONALIZATION TECHNOLOGY BECOME MATURE?

Gartner's 'hype cycles' illustrate how hyped versus mature a specific technology is in any given year.¹¹ Roughly speaking, a hype cycle consists of five stages:

1. **Technology trigger** – commercial viability is unproven
2. **Peak of inflated expectations** – some companies take action but most don't
3. **Trough of disillusionment** – implementations fail to deliver
4. **Slope of enlightenment** – second- and third-generation products appear, and more enterprises fund pilots
5. **Plateau of productivity** – mainstream adoption starts to take off

For personalization technology, the developments over the years seem to indicate a growth in maturity.¹² If we look more closely at the entries called ‘personalization’, ‘personalization engines’, and ‘multichannel marketing hubs’, these all represent marketers’ ability to implement personalization, and we should get a deeper insight into how Gartner perceives the progression. We have gathered these in *Figure 3*. First, multichannel marketing hubs, which are used mainly for outbound communication such as sending personalized emails and messages, have moved considerably along the hype cycle between 2018 and 2024, from the ‘peak of inflated expectations’ in 2018 far onto the ‘plateau of productivity’ in 2024. Second, ‘personalization’ had its very own entry, which actually seemed to flourish from 2014 – when it entered the hype cycle at the start of the ‘trough of disillusionment’ – but then quickly jumped onto the ‘slope of enlightenment’ in the following year and then moved further up in 2016 and 2017. Then suddenly it disappeared. Instead we got ‘personalization engines’ appearing in the ‘trough of disillusionment’ in 2018. Moving slowly but steady forwards, in 2024 they are only just entering the ‘slope of enlightenment’. This raises a few questions. Was it a bad idea to put personalization into an engine? And what about the other categories called ‘real-time marketing’ and ‘personification’? They also seem to relate to personalization. Either way – we can conclude two things. First, Gartner doesn’t really seem to help us in terms of getting a clear understanding of the term ‘personalization’. Second, the direction is clear: personalization is moving forward in terms of maturity.¹³ Third, sitting right on top of the ‘peak of inflated expectations’, we now have generative AI. No surprises there. Right now, it seems like every vendor, every marketing team, and every business leader believes AI will solve all personalization challenges overnight. In contrast, Gartner believes that generative AI will take some time to mature – or at least that it will take companies a while to adapt generative AI into their work in a meaningful and profitable way.

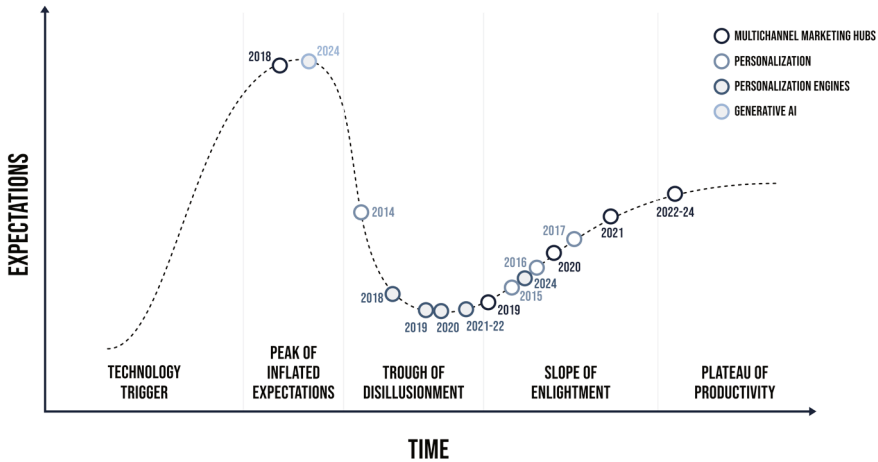


Figure 3. Personalization, personalization engines, and multichannel marketing hubs are moving forwards on Gartner's Hype Cycle for Digital Marketing. Generative AI is at the peak of inflated expectations.

So, is it now time for mar-fi to become a reality? Or will shoppers forever remain frustrated about the gap between their expectations and what personalization can offer? The conclusion must be that even if the relevant technology isn't yet plug-and-play mature, there is no doubt that personalization is a powerful way of increasing the effectiveness of marketing. You may not be able to create a feeling of one-to-one personalization for each and every customer, but, as we shall see, less will do. And anyway, how would it be possible to achieve 100% personalization for customers you don't know that well? Moreover, if you could, how would that make those customers feel?

As we will see, personalization has also been met with a lot of criticism. First, it is a term that has a lot of ambiguity. Many marketers speak about personalization but they don't necessarily totally agree about what it is and when it is useful. And speaking of 'when' – personalization is not *always* the right tactic, since it complements some business scenarios and challenges substantially better than others. So, to avoid misunderstandings, bad investments, and broken promises, we need more clarity, which the next chapter aims to provide.

CHAPTER 2

WHAT IS THE PROBLEM WITH PERSONALIZATION?

As we mentioned in the previous chapter, the potential problems with personalization are manifold. First, let's have a look at marketing practitioners. These come in several types, as the field of marketing has become huge since the digital transformation started at the beginning of this millennium. Later in this chapter, we'll look at whether personalization is worth it and how this book aims to contribute by uniting marketers behind a common definition.

THREE BRANCHES OF MARKETERS

Digital marketing started out with three main branches. One branch was concerned with building organizations' websites as an online presence and hence was of a fairly technical nature. Keep in mind that this was way before content management systems (CMSs) were invented during the early 2000s. These are systems that separate content from presentation and thus make it easy (or at least easier) to build and manage corporate websites and ecommerce stores without having to code. The whole notion of the user experience (UX) emerged on top of this. UX is all about designing homepages in a user-friendly manner such that users can find what they are looking for and achieve their goals. This whole practice later grew into what we know today as the CMS business, with its web agencies, system integrators, and dedicated UX and digital design agencies.

There was a business purpose behind putting those web pages on the internet as they served as a digital brochure that anyone could find and thus be prompted to get in touch with the company. But due to the technical (rather than human-focused) nature of the early CMS business, these marketing practitioners were less concerned with tallying the results of their efforts via clearly stated business goals and key performance indicators (KPIs) measured in money. Their main driving force was ‘doing the right thing’ to make the user happy. If they knew who the user of the homepage was, it would be interesting to dynamically show them content on the front page that matched their preferences – or, in the case of e-commerce, show them products that they might like. This was just what the marketers had seen Amazon.com do. So, they were definitely interested in personalization, but from the UX perspective rather than for strictly commercial reasons.

The second branch of marketers was occupied with driving traffic to their company’s homepage. To begin with, this meant making sure that the homepage was listed and categorized correctly on the directory pages that later came to be the large search engines (such as Yahoo and ultimately Google). This practice attracted people who were into advertising – not so much the creative and brand-oriented ‘(m)admen’ as those who were responsible for distributing the ads and generating footfall in physical stores. When the internet came along, to begin with these marketers were primarily concerned with getting listings into online directories and subsequently purchasing the premium positions and category captainships. The idea was to make their company stand out and get traffic to its homepage. With the evolution of online directories into proper search engines as we know them today, the main function of these people transitioned to that of buying advertising on search engines and news portals. This branch of marketers ultimately grew to become the ad-tech aspect of marketing, centred on media agencies collaborating with ad agencies and advertisers (companies that advertise).

Since the beginning of the digital era, this branch of marketers has become accustomed to measuring every single exposure and click that an ad generates in order to optimize media spending for the advertiser. However, this has traditionally been at an anonymous statistical level where the individual user or customer cannot necessarily be identified. It is thus concep-

WHAT IS THE PROBLEM WITH PERSONALIZATION?

tually quite far removed from the field of UX. In addition, a large part of advertising is concerned with improving brand awareness and potential customers' feelings towards a brand, so as to boost long-term success and not necessarily drive a purchase here and now. Thus, brand advertisers often measure 'soft' proxy metrics instead of real conversions (i.e. people who click an ad with a potential intention of making a purchase). However, being able to show different ads in different places for different people drives better statistics, no matter which metrics you are looking at. This brand of marketers was therefore definitely also interested in personalization.

The third branch of marketers used to do database marketing. They had a database of known customers with physical addresses and perhaps a little extra demographic information. This made it possible to divide customers into segments (see *Chapter 3*) and send them postal letters (so-called direct mail) to encourage them to buy a certain product or subscribe to a certain magazine or service. Technology was developed to automatically print people's names and perhaps even their personal data (such as occupation or title) on the fronts of the envelopes and inside the letters. The idea was to make the communications feel more personal and thus drive higher open rates and conversion rates (as in 'converting' non-customers into customers).

With the advent of email as a common method of communication (for both people and companies), the direct marketing discipline initially evolved into email marketing and then into a more channel-rich form, namely multichannel marketing. Multichannel included email, direct mail (even marketing via fax in some cases), text message marketing, and to some degree online landing pages. Since then, it has evolved to become omnichannel marketing. The term 'personalization' has become a major concern as data collection is now a native part of digital communication and it is easier than ever to imagine and orchestrate bidirectional customer journeys (where customers' interactions with a company determine the next message they are sent). Direct marketers have therefore been using personalization since the beginning.

Some would argue that we've left out the brand marketers here – but there's a good reason for that. Within brand marketing, personalization is of hardly any use. A company has its core brand story and this

shouldn't be different for different customers. Thus, it shouldn't be personalized.

So, looking at these three branches within marketing, it is easy to see how each of them should be interested in personalization, since personalization allows marketers to show content to individuals that better fits their preferences and ultimately drives a better UX and better commercial results. However, looking at where they come from, there is also clear potential for them to misunderstand each other and perceive topics and goals very differently. This can lead to confusing conversations and, not surprisingly, sometimes also trouble collaborating on personalization.

IS PERSONALIZATION WORTH IT?

It seems intuitive and logical that personalization creates a better customer experience and that this can lead to an increase in response rates and, ultimately, sales. However, there is still an ongoing discussion about whether personalization is worth it. Is the juice worth the squeeze?

It does, after all, require some work to conceptualize and produce the different content variants needed and to set up the technology to do the matching and distribution – even with the help of generative AI. Additionally, there are out-of-pocket expenses for technology licences (e.g. for CMSs, customer data platforms, and marketing automation platforms). This is all needed to make sure that the right people get the most relevant content and that personalization is *effective*.

If you manage this process poorly, then clearly you may waste time and money producing and distributing content variants for customers that make little or even no difference. Personalization has to be not only *effective* but also *efficient*.

In the previous chapter we discussed the hype of personalization and saw how Gartner believes that personalization technology is moving forward through the hype cycle, now reaching the 'plateau of productivity'. But even within Gartner, the aforementioned internal confusion between marketers seems to pop up. In a prediction in 2019, Gartner claimed that by 2025, some 80% of marketers will abandon personalization efforts due

to data management issues, poor technology, and difficulties with proving a return on investment (ROI).¹

Indeed, the idea of there being difficulties around proving ROI resonates with the proxy metrics in use by branding-oriented advertisers (part of the second branch of marketers discussed above). As we will see in *Part Three*, data is truly one of the (if not the) primary prerequisites for making personalization profitable.

Also, reading between the lines, it could be that at least for the authors of the 2019 prediction, Gartner's perception of the term 'personalization' is actually more like so-called hyper-personalization, where every interaction is very personalized. As we will see in *Chapter 14*, it most likely isn't realistic – nor profitable – to always aim for a hyper-personalized customer experience for all customers.

THE BRANDING SCEPTICS

Personalization has been met with criticism not only from research companies but also from within the professional marketing community itself. Personally, we found it both very interesting and at first glance quite discouraging when, in May 2022, we stumbled upon an article in *Marketing Week* with the title 'Forget Personalization, It's Impossible and It Doesn't Work'.² We had just started work on this book and we were met with the claim that personalization is impossible and we should just forget about it. But before abandoning the book project altogether, we decided to actually read the article.

Reading between the lines, we felt the article's focus was primarily on advertising and more specifically brand advertising – a discipline where we fully agree that personalization isn't the obvious choice of tactics (as we will explore further in *Part Three*). It seems to us that the authors had their own view on personalization and were of the opinion that within their particular field, personalization wasn't working for them. But it wasn't clear that the headline didn't necessarily apply to all things personalization. On a side note, we can't help but suspect the authors were aware of this and partly wanted to create a headline that would turn heads and make people react. Once an adperson...

The takeaway here is that while these authors had one perception of the topic of personalization, we personally come from different backgrounds – namely, the two other branches of marketing, where first-party customer data and owned media (such as email, web, SMS, and apps) are dominating the scene.

It's worth mentioning that while we were writing the first edition of this book in 2022, the criticism levelled at personalization was much stronger than it currently is. The advent of generative AI and its assumed effect on personalization have largely drowned out criticism of the topic. Especially given that Gartner has positioned generative AI on the very peak of inflated expectations of the hype cycle (as we touched upon in *Chapter 1*), it will be extremely interesting to see how this plays out. This updated edition aims to make it substantially easier for you to navigate this hype and apply generative AI in the right places, for the sake of better personalized customer experiences. As you will see, we believe generative AI can greatly boost the efficiency of creating personalized customer experiences – but it definitely doesn't replace solid creative work and human ingenuity (in its current state at least).

WE NEED A CLEAR DEFINITION OF PERSONALIZATION, NOW

Regardless of what generative AI is doing to personalization, the confusion around the term is still evident. There are still numerous perceptions of personalization pointing in many different directions all at once. So what, then, is personalization really? What is the true, nuanced picture here? As marketers, we need to gain a better and common understanding of the term 'personalization'. Only then can we avoid the pitfalls of bad and excessive overinvestment in both tech and people, and create truly profitable personalization while keeping customers happy and not jeopardizing long-term business opportunities.

Not until we have this understanding can we expect people outside marketing to make informed decisions about when to invest in personalization as opposed to totally different investment opportunities (such as opening a new store or sourcing or developing other products). Not until we have this understanding can we expect people to take personalization seriously.

CHAPTER 3

DEFINING PERSONALIZATION

So, what might a definition of ‘personalization’ look like? First of all, let’s be clear that in this book we are concerned with the topic of personalized communication: communication that companies initiate primarily from either a marketing or a communications department. This book (including the definitions it offers) could potentially be useful in areas such as product development, research and development, and how a product can be personalized for specific customers. However, this is not the aim of the book, so please consider yourself to have been provided with a hefty disclaimer if you’re coming at the book from one of those angles.

During the research process for the book, we came in contact with Dr Tekila Nobile from the University of Lugano in Switzerland, to whom we owe much gratitude for having unravelled the emergence of personalization from an academic perspective. Nobile and her colleague Nadzeya Kalbaska wrote in their article ‘An Exploration of Personalization in Digital’ (2020) that they too see the problems that arise from the fragmented understanding of personalization. They also see the need for a comprehensive and updated definition of the term:

The lack of common terminology still represents one of the obstacles to fully understand the concept and all its facets.¹

In their article they describe how personalization isn’t a new term – it has

been mentioned and used since way before the advent of the internet. They also go further to describe some of its characteristics.

PERSONALIZATION VS CUSTOMIZATION

It is important to distinguish between personalization and customization. Nobile and Kalbaska discuss this distinction. Although there are several scholars who use the two terms interchangeably, we'd argue that it makes great sense for practitioners to follow the stream of research that distinguishes between the two concepts.

In this stream, set down by Dr Steffen W. Schilke from Plymouth University and colleagues in 2004,² **personalization** can be seen as the process through which companies personalize their offering and/or communication with their customers. In contrast, **customization** is a customer-initiated process (hence *customization*), where the customer customizes a product (e.g. choosing the colour of a car's interior or having their name printed on sports clothing) or a product view (e.g. by setting explicit criteria for filtering and/or sorting based on the product's properties).

ACTUAL VS PERCEIVED PERSONALIZATION

It also makes sense to distinguish between actual and perceived personalization. **Actual personalization** refers to whether or not the sender of a message has in fact made some kind of personalized modification or is just serving generic content. **Perceived personalization** instead looks at the process from the point of view of the receiver. For instance, a generic set of product recommendations (e.g. bestsellers) could be perceived as personalized if they were presented with the headline 'Especially for you'. This distinction answers the question of whether the end customer has to notice that personalization is going on in order for it to be characterized as 'proper' personalization: the answer is 'no'. Personalization doesn't have to be apparent to the receiver of the message.

IMPLICIT VS EXPLICIT PERSONALIZATION

In this book we will also distinguish between explicit and implicit personalization. **Explicit personalization** covers cases where it is apparent to the

receiver that personalization has taken place. In the case of parametrized personalization – such as ‘Hello \$FirstName’, where all recipients’ first names are automatically inserted into an email (for example) – we are talking about explicit personalization. The same goes for the yearly email that Spotify sends its customers where it tallies up how much the individual has used the service, which artists and songs they listened to the most, and so on. In fact, you could argue that any kind of invoice or bill is explicitly personalized. Explicit personalization can also take place without parametrization – for example, on the headline level, where it is clear which segment (see below) of customers the sender has in mind and is personalizing the communication to them.

Implicit personalization, on the other hand, is more subtle. It can easily be the right tactic when addressing touchy subjects such as pregnancy, sexuality, divorce, or even death. During the research for this book, an expert committee discussed how a pension company would always tread very carefully and communicate very subtly (if at all) if there was an indication in the data suggesting that a customer had been through a divorce. It is always worth remembering the classic example of the American retailer Target, which suggested pregnancy-related products to a minor.³ Her father was furious and called them to complain. They gave him an excuse and explained that it was just the algorithm suggesting products based on previous purchases. Later it turned out that the minor was in fact pregnant. The lesson from this story is that it wasn’t wrong for Target to suggest these products, but it should have been more discreet and not put them in the primary position within its recommendations.

TARGETING

Explicit personalization almost always takes place on so-called owned media (web, app, email, SMS, etc.) and very rarely in advertising. This is due to the following facts. First, parametrization in advertising is impossible. Second, you cannot really be sure who will be looking at an ad. Third, explicit personalization in advertising would also come across as super-creepy to most people. We’ve only ever seen one explicitly personalized ad. This was a Facebook ad that addressed the fact that one of the authors hadn’t completed his purchase at a ski-apparel merchant. He actually did

go back and complete his purchase. Because of the ad? Not in this case – but for other customers this could have been the determining factor.

When companies use personalization on communication channels where parametrization with personal data isn't possible (e.g. advertising), it is often referred to as **targeting**. Advertising platforms commonly gather insights and allow advertisers to segment their messages based on these insights. It is also possible for advertisers to match their company's own customer data (first-party data) with that of the advertising platform, and thus achieve much more precision.

In advertising on digital paid media, using first-party data to define a so-called audience pretty much sets the bar for how personalized advertising can become. The only way to improve on this is to use tools for product retargeting, which is a way of exposing customers to the exact product they were close to buying.

SEGMENTATION VS PERSONALIZATION – NOT A BINARY DISTINCTION

A topic that was heavily debated in the expert committee meetings that made up part of the research for this book was the distinction between segmentation and personalization. As *Part Two* of this book will discuss, **segmentation** is something you do to your customer database. It involves dividing your customers into ever smaller segments to allow you to communicate different things to different people at different times.

If you insert recipients' first names within a piece of content intended for a specific segment, then everybody seems to concur that you are doing personalization. If, however, you don't parametrize anything in the message and it is generic for the segment, then some would argue that you aren't doing personalization but merely segmentation. So, in this light, implicit personalization (as described above) would in fact fit this description and thus be segmentation. Imagine, then, that you set up so many criteria for your segments that they end up being very small indeed. When are the segments small enough for everyone to agree that we are talking about personalization?

As we will explore in *Part Two*, classic segmentation is not the only type of insight you should be using when working with personalization. Behav-

journal data collected in real time from customers' interactions with your digital platforms and assets has great significance in terms of enabling you to decide whom to send to and when. In essence, this is also a way of segmenting your customer database, albeit very granularly. None of the experts who took part in the research process for this book argued that a generic message sent at the right individualized time (e.g. an email sent to all customers with a credit card expiring in five days) wasn't personalization. We even agreed that *not* sending something could be regarded as personalization. It can hardly get more implicit than that.

It is clear that the distinction between personalization and segmentation is blurry when taken to the extreme. So, for the sake of clarity, we will treat segmentation as a term that lies within the umbrella term of personalization.

TWO ACADEMIC DEFINITIONS OF PERSONALIZATION

Having covered these important aspects and distinctions related to personalization, it's time to visit some actual definitions and come to a conclusion about which definition the Bowtie of Personalization is built upon. First, let's briefly visit the definition that Gartner suggests:

Personalization is a process that creates a relevant, individualized interaction between two parties designed to enhance the experience of the recipient.⁴

We agree with Gartner that personalization is a process and also that there are two parties involved. But otherwise we find the definition too narrow.

First of all, creating a relevant experience will indeed be a goal of the company, but it is solely up to the recipient to decide whether something is relevant or not. And, as we concluded above, this decision is not an 'either-or' and doesn't even have to be a conscious one. Our second point of critique centres on the word 'individualized'. Since personalization can happen implicitly and at the segment level, this seems out of place in the definition.

Last but not least, the sole focus on enhancing the experience of the recipient seems slightly altruistic, as any marketer is (or should be) out to create value for their company – not just enhance the experience of the recipient.

So, at least as a practitioner's definition, Gartner's seems too narrow, as it won't always pay off to invest in individualized communication for the sole purpose of enhancing the customer's experience. As we will see in *Chapter 14*, companies should focus on key parts of the customer journey in their personalization efforts, otherwise it may not be worth the effort.

We will once again draw upon the work of Tekila Nobile, this time writing with Lorenzo Cantoni, for an alternative definition:

“ [Personalization is] a dynamic process in which an object is changed for an individual in order to provide added value for the individual herself/himself. Such a process, which takes place in a given context, can be user- or firm-driven. The object, either tangible or intangible, is changed in dimensions at a number of states. The individual either provides information about her/himself, or the information is inferred by the change maker. According to some, personalization and customization are different concepts. Customization is then characterized by an active contribution from an individual, up to her/his involvement in the co-design of a product.

5

If we start at the end of this definition, then we are confronted with the ambiguity between personalization and customization. As outlined above, for the sake of clarity and general good sense in distinguishing between a customer-initiated and a company-initiated process, we prefer to keep the two terms apart. Moving one step further back in the definition, we meet the term 'information'. In day-to-day marketing jargon, this is referred to as 'data' – either explicit data (voluntarily submitted by the recipient) or insights 'inferred' (perhaps from other data sources). This part of the definition fits with the commonly used terminology of predictive analytics and how algorithms can indeed infer propensities or degrees to which a certain statement holds true for a specific individual. How certain are we that a customer is going through a divorce? If they haven't specifically submitted that data to our company then we're better off not addressing it directly – edge cases aside.

Moving further back in the definition, the ‘object’ of personalization is usually referred to as ‘content’ within the marketing discipline. It can, however, also be functionality. For example, should a specific feature be visible for a specific customer of an online bank? The idea of changing content across several dimensions fits beautifully with the Bowtie of Personalization, as we will see in *Part Two*. And the reference to ‘tangible or intangible’ objects could refer to the fact that the exclusion of a specific customer from a certain message is also a form of personalization.

Finally, the first part of the definition is the soul of personalization: it is used because the sender believes that it will create better value for the recipient. Again, however, we feel that the goal of profiting from personalization gets lost in this definition.

A PRACTITIONER’S DEFINITION OF PERSONALIZATION

One company in which personalization is a core strategy is Netflix. At a conference in Gothenburg, Sweden, in 2022, Gibson Biddle recounted how he carried out several personalization experiments during his time as Vice President of Product for Netflix.⁶ His framework for creating value in this role involves focusing on three core points:

- Delighting the customer
- Making things that are hard to copy
- Margin enhancement

Biddle labels this his DHM framework (with the ‘H’ coming from ‘hard’).⁷ Among other tactics, such as having unique content, personalization ticks all three boxes in this framework. We believe the margin enhancement point beautifully underlines the duality of value creation – for both the customer and the company – to a much larger extent than do the two previously visited definitions.

On the basis of the above definitions and with the discussed distinctions in mind, we propose the following practitioner’s definition of personalization:

“ Personalization is a distinct communication tactic that aims to create better immediate and future business value by showing, hiding or ranking specific content to recipients in a way that is expected to align with insights into their explicit or inferred preferences.

Let's break this definition down. First of all, personalization is one of many potential communication tactics, hence the term 'distinct'. The vast majority of practitioners use it as a tactic, but there are also examples where personalization is used as a core strategy. This is the case for companies such as Amazon, Facebook, and Netflix. In general, if your product is 100% digital, then personalization stands a higher chance of becoming a strategic differentiator.

Personalization is often used within marketing, but not all communication prone to personalization is related to marketing-specific goals. Hence, we use the term 'communication tactic' and not 'marketing tactic'. The message that creates the most value for recipient and company alike may very well be a non-marketing-related message. If, for instance, a customer has had a bad experience with a certain service, then the next best message will most likely be one that explains what went wrong and what has been done to avoid this happening again. It's not marketing a new product or a potential upsell (which could easily come across as pushy and aggressive).

When practitioners work with personalization, they have a purpose in mind. As long as the value creation is mutual for recipient and company, it's fine to enhance the customer experience. The overall purpose, however, is to create *business* value. This can be short term ('immediate') or long term ('future'). For example, in the short term, a company might be chasing conversions on a specific campaign in order to meet short-term targets. This can mean repeating a certain offer multiple times – but not to the point where it jeopardizes future business value (e.g. if the recipient begins to perceive the messages as spam, resulting in decreased brand perception and trust – or even causing the recipient to choose to unsubscribe from further communication by revoking their consent to marketing).

The idea of 'showing or hiding specific content' refers to the fact that choosing *not* to show or send content to a recipient can sometimes be

beneficial for long-term business value. If the chances of a specific recipient finding a specific offer relevant are slim to none, then it's better not to show (let alone send) that offer to that recipient so as not to create noise and annoyance. As we will see in *Chapter 8*, content comes in many forms, and these can easily coexist or be part of the same customer experience, for instance when a person looks at a website, an app, and an email.

The term 'recipients' refers to the fact that there is a receiving end of personalized communication. The company is sending or showing the content and recipients are receiving it. Of course, interactions do take place where the 'recipients' submit personal information, and thus these interactions resemble mutual conversations. Note that 'recipients' is in the plural because personalization always has the goal of scaling personalized experiences to as many recipients as possible in order to maximize the value gained from the effort.

The last part of the definition refers to how the specifically shown content is expected to align with the preferences of the recipients. We use 'expected' because there can only be one judge of whether alignment has been achieved – namely, the recipient. No matter how much data is collected, marketers generally have only vague impressions of the contexts and the intentions of their recipients (unless these are explicitly stated, of course). Nevertheless, preferences can still be inferred to a greater or lesser degree based on data collection and advanced analytics, and this can certainly still create value for both parties.

PERSONALIZATION IS NOT AN 'EITHER-OR'

Our definition of personalization is fairly wide, as indeed are the other two definitions discussed above. Some practitioners might argue that it is *too* wide compared with their perception of personalization. However, we believe that marketers would benefit from uniting to understand, respect, and connect with each other's definitions to present a stronger position and more robust results to senior management.

Thus, our definition is open to many forms of personalization, both implicit and explicit, and on both owned and paid media. So, to conclude this chapter, personalization is not a binary thing but more a question of degrees. This means that, for instance, choosing to show ads to an audi-

HELLO \$FIRSTNAME

ence that Facebook believes algorithmically matches your best customers is an act of personalization. It is definitely not the most explicit example of personalization, and the people seeing the ad will probably never realize that it wasn't just random coincidence they saw it. However, it is still personalization.

CHAPTER 6

THE BOWTIE OF PERSONALIZATION

Sergi works at the Iberian fitness club operator VivaGym as the Head of CRM. Since VivaGym is experiencing significant growth, one of Sergi's key responsibilities is to ensure a smooth onboarding process for the many new members. Everyone knows that the beginning of a membership is crucial for establishing workout habits and ultimately for retaining members. Generally speaking, there are important actions that VivaGym encourages all new members to complete as part of the onboarding process. These actions include downloading and using the gym's app (e.g. for training programmes and to make bookings) and potentially also trying multiple gym locations. Some of the services are also potential upsells – such as personalized diet plans or the option of bringing a friend along at the weekend.

Once new members have been with VivaGym for a few months, they reach – consciously or not – a decisive moment of truth as to whether they'll continue using the gym or not. While it may seem obvious to launch a campaign for all new members in January, Sergi knows that each and every day there are new members joining. Really, communications should be aligned with and personalized for each individual. When he sets up the automated and personalized communication flow, he's confident that, over time, this will positively impact member engagement, help to create healthy workout habits, and decrease churn.

Thinking about the customer personas the company created last year, Sergi realizes that they need to craft multiple variants of the onboarding messages depending on which segment they are communicating to. Young people working out to look amazing on the beach need different advice than do senior citizens who work out for the sake of ageing healthily. Sergi makes a note asking the copywriter to carefully produce message variants for each major segment as well as a default variant for the remaining customers. Additionally, all major communication channels need to be considered, so the copywriter will use generative AI to craft all the copy needed for emails, push notifications, the app, the website, and even the paid ads that Sergi has planned in order to show the members they simply must to lose. Graphics will be made accordingly. For each segment, he decides to define an inspirational content block with selected exercises and classes – for example, hardcore strength exercises for the young men and gentle mind–body classes for the elderly women. The content blocks will be featured in emails, in the app, and on the website for each individual.

The above scenario illustrates how personalization might take place in a fitness club such as VivaGym. In this case, the Head of CRM, Sergi, carefully matches the insights he has about both moments of truth and segmentation with content such as creative reactivation messages and inspirational feeds of suggested exercises and classes. This maki cube of supposedly customer-relevant communication is then produced at a channel-agnostic level (an omnichannel level) before it is applied in an automated communication flow that spans the most important communication channels between VivaGym and its members. This is a textbook example of using personalization to optimize the feeling of relevance and reduce membership churn.

The scenario touches upon two key elements that are key to succeeding with personalization – namely insights and content. Broken down further, the insights consist of both the dynamic moment of truth (in the form of the member inactivity) and the rather static customer segments (both young and old members). The content consists of both carefully crafted creative messages and curated feeds of content with recommended classes. The beauty of the example also lies in the omnichannel approach to both the production and the distribution of the messages across owned and paid media. In owned media the inactivity can be

THE BOWTIE OF PERSONALIZATION

addressed fairly explicitly, whereas in paid media the reactivation message needs to be a bit more implicit and subtle so as not to be perceived as creepy.

These four elements of insight and content together form the Bowtie of Personalization (see *Figure 5*), which serves as this book's main model for understanding the different forms of personalization. As we'll cover in the following chapters, each of the four 'corners' of the bowtie has its rightful place and purpose. Each one plays the main role in some areas of personalization and a smaller role in others.

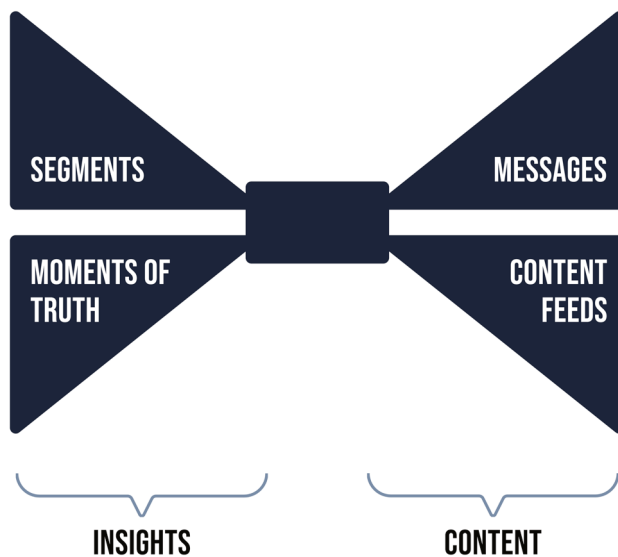


Figure 5. The Bowtie of Personalization

A GLIMPSE OF HYPER-PERSONALIZATION - WHAT'S 'KNOT' TO LIKE?

If all four corners of the bowtie are in play at the same time, this is pretty much the most personalized a piece of communication can become. Naturally the insights can, over time, become more precise through better data collection and algorithms. The content can also become more creative and, thanks to generative AI, it's now easier than ever to create more content variants matching more segments. Eventually the customer experience becomes what is often referred to as 'hyper-personalization'.

The amount of work you put into tying this beautiful knot will be worth it if you use it for the most important parts of your customer journey and craft a personalized and memorable experience. Imagine the customer journey as one very long piece of cloth with a knot of hyper-personalization for each critical moment along the way, so that you have a chain of bows placed at appropriate points along your customer journey.

In the case of VivaGym, one of the most important business goals is to onboard members well to ultimately reduce churn, and the most dominant customer insight in assessing the risk of churn for a single member is disengagement (as in, not using the membership). This is why it makes sense for the VivaGym team to do everything in their power to create an automated (yet personalized) and memorable onboarding process for all members, so as to help create the healthy habits that will keep people visiting the gym.

For an online grocery retailer, the most important part of the customer journey could be getting new customers to make three purchases within a month. For a charity it could be getting a donor to sign a recurring donation subscription. These moments are where you should focus your personalization efforts. They are where you should tie the most beautiful bowtie knots that you can.

For the less critical parts of the customer journey, you can justify a more general and less personalized experience. It won't be profitable to aim for hyper-personalization at every single touchpoint with customers.

Dramatizing the knot in the bowtie

Doubling down on the knot in the bowtie will help you to create the impact that you're after, but it is also the perfect way to communicate what personalization is all about and what kind of customer experience you are out to create. So why not dramatize it and put it into a narrative in much the same way as we have in the case study at the beginning of this chapter? Why not make this narrative into an animated video that can be shown at internal town halls, to new employees, and to all team members who are trying to make this narrative a reality? Since the dawn of time, human beings have gathered around the campfire listening to narratives and seeing themselves in them. A dramatized narrative about how personalization can create better customer experiences and business results has

the power to convey personalization on both a logical level and an emotional level like almost nothing else.

True personalization magic happens before the channels

There's an old saying that is often mentioned when the conversation turns to personalization: 'personalization is about sending the right message to the right person at the right time and through the right channel'. So, if we take a closer look at the Bowtie of Personalization, you could argue that it covers the content of this sentence to a large extent. However, the 'right channel' part is not included. Why is that so?

As individual consumers, we don't have *one* relevant channel. We cannot *only* be reached on the *right channel*. We all wish we were better at using ad-blockers, unsubscribing from uninteresting newsletters and app notifications, and doing *some* digital detoxing, but we're most often not. The same goes for the vast majority of people out there. Also, people often need to see the same message multiple times in order for it to sink in. Exactly how many times per person cannot be absolutely determined – but engaging formats will, of course, bring this number down.

Communication channels cater to different formats and thus each have their own rules of engagement. For instance, you'd rarely use the same content on TikTok as you would in a personalized email. As a marketer, however, you should use the Bowtie of Personalization to at least mentally decide who should be exposed to which content at which given time. And remember that the core of the message can essentially be the same no matter how different the formats.

Central management of insights and content drives efficient personalization

As we will cover in *Chapter 14*, the more centralized your management of your content, the more efficiently you'll be able to execute personalized communication across channels and thus create better results with less effort (see *Figure 6*). Conversely, the more that content is built into or created for each specific channel or platform, the more cumbersome it is to both create and maintain. Although it can feel arbitrary and detached to put together a message without having a specific channel in mind, it is necessary for optimal efficiency.

The same logic applies to how you determine insights, in the form of both customer segments and moments of truth, and how they match the specific content pieces. If this logic is built into each channel, then personalization across channels can be very hard to both build and manage.

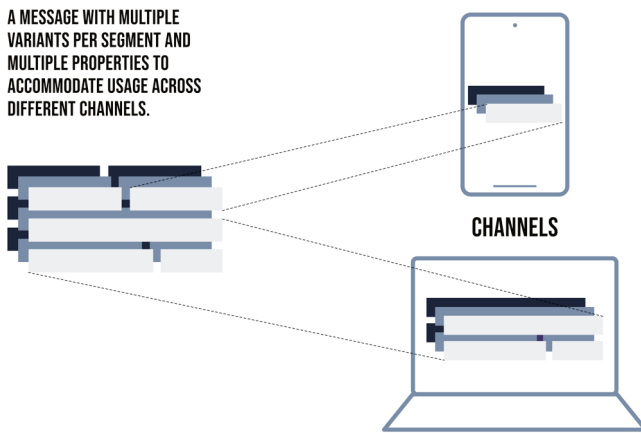


Figure 6. Ideally, personalization happens before a message is applied to a specific channel; the message will appear differently in each channel.

The art of the possible

As not all channels or platforms offer the ability to create, manage, and publish content to specific audiences from a central content hub, it is, of course, the art of the possible that is at play here. But the art of the possible is quickly becoming the art of the practical. Tools powered by generative AI now support message ideation, localization, and channel adaptation in completely new ways. In *Chapter 16* we introduce the CX Layers model, which is a novel way of examining how you can not only develop the insights but also the content required for personalization. The data is processed through the data layer and the content is processed through the content layer, with the two eventually meeting in the personalization layer. As we will see, generative AI can play a very similar role for the content layer to the one predictive analytics plays for the data layer. Nevertheless, you cannot personalize every single touchpoint with every single customer in all channels, every time. We're still dealing with the art of the possible – and you should accept that and be fine with the fact that

you're prioritizing the most promising moments of truth from the top of the list.

Websites and apps mash it up

On inbound platforms (web, apps, and even in-store), many types of content are visible at the same time. So, more often than not, multiple content feeds and multiple messages will appear simultaneously. Not all of these will be personalized, however, as these platforms carry general information that needs to be available for all customers and also cater to the anonymous visitor. Over time, however, you should strive to increase the degree of personalization on digital platforms by motivating customer identification through a persistent log-in and subsequent data collection of interactions and purchases. An ever-relevant example is to try logging out (yes, you're most likely already logged in) of Amazon and notice how different the website appears. This serves as a testimony to how different a digital platform experience can be because of personalization.

DECIDING ON YOUR COMMUNICATION CHANNELS

We've established, then, that consumers don't have *one* right channel – and, as will be explored further below, messages often have to be repeated in order to affect decisions. These factors have great implications for how you select which communication channels to work with in your personalization efforts. Optimizing cost will be the guiding principle for deciding which channels to choose.

Owned media before paid media

As a rule of thumb, owned media is the preferred choice for personalized communication since it will enable you to control your costs to a much higher degree than is possible on paid media. Showing a personalized message on your website and in your app will generally not cost you anything. Similarly, sending emails and push notifications will generally have a very low transaction cost. The same cannot quite be said for SMS, which carries a small fee, and certainly not for direct mail, which is considerably more expensive.

If you can efficiently distribute your message to the right individuals through owned media and you see that this has the intended effect, then it

makes sense not to try to further expose these customers to this message – and certainly not on paid media. You might, however, still be missing the intended reaction from your customers (indeed, some audiences are using email less than others¹). If so, you'll have to decide how much it is worth for you to use paid media to further try and drive the desired action. As we will later see, this is also a type of customer insight. Whom can you expect to convince? Who is worth reaching? (See *Chapter 7* for more on this.)

So, in this way, channels should be used in a trickle-down manner based on cost. No one has one favourite channel. Most people use many channels.

The new channels

Throughout this book, we'll often mention the Google and Facebook (Meta) ecosystems when referring to paid media and advertising. We realize that these are not the only advertising platforms and that brands are certainly driving value from advertising across other platforms – including TikTok and retail media. From a personalization perspective, what matters is whether or not you as a marketer have the option of efficiently targeting specific audiences and can thus use these channels as an integrated part of the personalized customer experience. If this is not possible, then they can still be part of an interesting and effective marketing mix – it will just be harder to do any meaningful personalization.

The power of repetition

A term used in advertising is **effective frequency**.² This is a measure of how many times a person must be exposed to a classic (i.e. unpersonalized) advertising message before they respond and before further exposure is considered wasteful. It also applies to personalized communication – regardless of channel. Though some formats and channels spur greater attention and engagement, generally speaking it makes sense to repeat a message for a customer several times in order to increase the chances of it sinking in.

In advertising, this can be achieved through a very simple re-exposure of exactly the same advert. In email marketing, a reminder seemingly identical to the first message is generally considered acceptable by consumers –

perhaps wrapped up slightly differently in terms of the subject line or introductory text (marketing copywriting – or simply ‘copy’). If, for instance, it carries great importance for your results that your customers download and register on your app, it is definitely worth repeating a request to do so. In fact, this request could be included as a secondary message across email campaigns in general until the audience have taken the action. Consider, however, that not all customers will be interested in doing this, so some kind of expiration policy should be considered.

When you do identify a need to repeat an important message, you might also consider using multiple ways of saying the same thing. In this way, your message will stand a higher chance of being noticed and your brand will be considered more human and less mechanistically repetitive.

INSIGHTS COME FROM DATA

It is no secret that data plays a central role in personalization, namely in defining the insights. Sometimes a specific data point carries such great meaning or intent that it constitutes an insight in itself. If, for instance, you have behavioural data showing that a customer is browsing your web pages about how to cancel a subscription, naturally this is an insight that should not be missed. However, most insights go deeper and data exists in many forms.

Data can either be general and anonymous or relate to individual customers, and it can come from both qualitative and quantitative sources. Among advertising agencies, the term ‘insight’ has long been used to shape and justify campaigns. This type of insight rarely comes from first-party customer data. Rather, it more often comes from qualitative studies – based on focus groups, interviews, anthropological observations, and so on – combined with anonymized statistical data sources. This doesn’t mean that these insights aren’t valid or that they can’t be used for personalization. In the case of media buying, it makes great sense to limit ad spending and focus on certain segments based on the data and segmentation criteria available in the Google and Facebook ecosystems. Explicit personalization, on the other hand, requires that you have specific customer data for each individual.

Quantitative data drives insight; qualitative data drives messaging

Whereas quantitative data is the primary source of the insights used in personalization, qualitative data – and especially the interpretation thereof – can mean a lot for how a certain message is creatively crafted. For instance, consider the reactivation message for health club members at the start of this chapter. Qualitative data and insights will be useful in deciding what it is that could motivate a certain customer segment to perform a specific desired action. For example, why do the elderly members of VivaGym generally go to the gym? The answer will mean a lot in terms of what the onboarding messages should sound like.

Qualitative insights also matter a great deal for how both value propositions and platforms such as apps and websites are generally put together. Often qualitative insights will serve as inputs for how so-called personas are created. These personas take the form of narratives and serve as embodiments of specific important segments. The narratives help project participants to put themselves in the mind of the intended users – and thus design a service according to what the personas and not the designers themselves deem important. With the advent of generative AI, qualitative insights can now be generated far more quickly and with much greater granularity than ever before. Qualitative insights can be derived even at the individual level, based on individual usage data and service communication.

ALL MODELS ARE WRONG – BUT SOME ARE USEFUL!

The famous statistician George Box is often quoted as having said that all models are wrong, but some are useful. The meaning behind this aphorism is obviously that all models are approximations of reality and as such naturally fail to capture all of the complexity that real life entails. That doesn't mean that they aren't useful, however. So, depending on what your aim is and what decision you are looking to make, some models will make it easier for you to make up your mind and choose the optimal course of action. The Bowtie of Personalization is no exception to this rule. It is intended to help you and your colleagues better understand personalization as a term and thus collaborate more efficiently to create value through personalization. Having now presented the framework to marketers all over the world, we've seen how its clarity resonates universally across industries, teams, and levels of maturity.

As we will explore in the following chapters, the emphasis on the individual corners of the Bowtie of Personalization changes from one marketing discipline to the next. We will discuss how the emphasis shifts when you are working with campaigns (*Chapter 9*), marketing automation (*Chapter 11*), and personalization on inbound platforms such as websites and apps (*Chapter 13*). It will become clear where to focus to optimize value creation for both customers and your company within these disciplines.

FROM BOWTIE TO PYRAMID – WHAT DOES GOOD LOOK LIKE?

It is one thing to understand what personalization is and how it is applied in different marketing disciplines. It is another thing to know which parts of personalization to implement and in which order. For each of the marketing disciplines discussed in *Chapters 9, 11, and 13* (campaigns, marketing automation, and inbound platforms), we offer a set of maturity levels. For each maturity level, we offer details of the scope of the likely personalization efforts of a company operating at that level.

We will conclude this part of the book by gathering the three maturity levels for each discipline into what we call the Pyramid of Personalization (see *Chapter 14*). For now, we're mostly concerned with discussing the scope – the personalized communication you choose to implement and that eventually becomes part of the customer experience. We will refer to this as the **front end** of the pyramid throughout the rest of the book. This is the part that creates effectiveness, as we discussed in *Chapter 2*. In *Part Four* of the book we will examine the **back end** of the pyramid in greater detail. What is it that supports the personalized customer experience from an organizational point of view? This is more about organizational efficiency – again, as introduced in *Chapter 2*.

Together, the front end and the back end form the full Pyramid of Personalization, which is a full maturity model for working profitably with personalization across marketing disciplines (see *Figure 7*). The reason we describe the model as a pyramid is that the more sophisticated your work with personalization becomes, the more it is customer-centric and channel agnostic, and the more it supports long-term value creation – regardless of which discipline you're mainly working with.

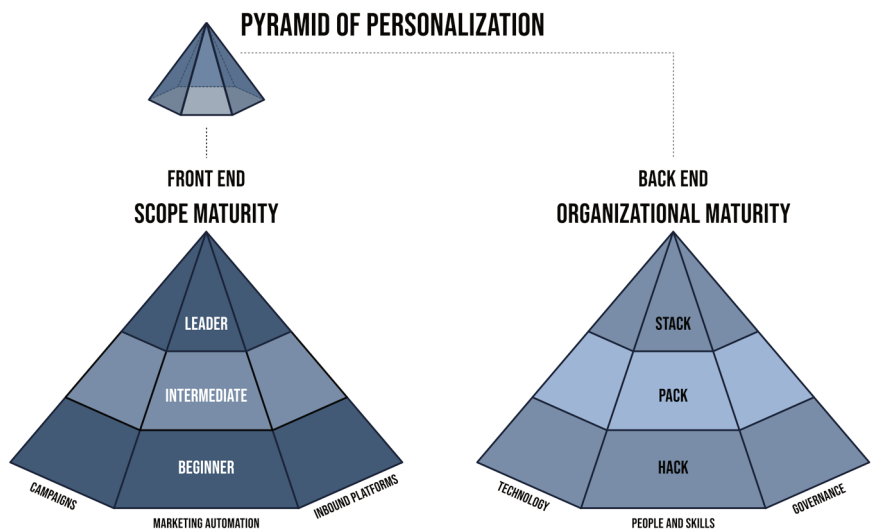


Figure 7. The front end and back end of the Pyramid of Personalization.

CHAPTER 16

THE CX LAYERS: HOW DATA AND CONTENT FUEL PERSONALIZATION

The fact that data plays an important part in personalization – and therefore the customer experience (CX) – should come as no surprise to any marketer. In fact, personalization projects are often led by enthusiastic engineers with a keen eye for getting data streamlined into a layer before it is ultimately ‘activated’. This activation is often handled by a different and more creatively oriented set of people. It can thus remain somewhat opaque, and the data-savvy people in charge of the project may even perceive it as trivial. As a consequence, many personalization projects suffer from poor coupling of data and insights into good, impactful, and engaging content – or at best the content side of the equation suffers from inefficiency.

Two years after the publication of the first edition of *Hello \$FirstName*, we’ve seen how generative AI has impacted personalization and things now look a lot different. It’s not that data is suddenly unimportant – rather, the newly found focus on how generative AI can help marketers create content has produced a new and much-needed focus on the role that content plays in personalization. To help you get some clarity on how data and content work in parallel to feed personalization, we’ve developed the CX Layers framework.

The initial spark for this framework came from the work of Scott Brinker and Frans Riemersma (the latter a co-author of this book). It also

stemmed from the growing understanding that a martech stack requires not only a data layer but also – and just as importantly – a separate content layer.

Rasmus Houlind's initial work on the Content Crisis Manifesto¹ formed the background for season two of the Hello \$FirstName podcast.² From this work, we realized something that now seems obvious: the importance of the content needed for personalization has a major impact on how marketers should think, build, and ultimately scale personalized customer experiences. Because once data is under control, marketers face another challenge – namely, content.

So, we started investigating and discussing the content layer in greater detail. We realized how much sense it makes to separate the content from the data layer, and we envisioned an almost parallel process for getting content ready for activation and ultimately personalization. Our first draft made it into the *Martech for 2025* trend report that Scott and Frans presented to the world in December 2024.³

Having now shown this framework to senior marketers at countless presentations, our perception is that, for many who work in this field, this new way of thinking about content is a game-changer. Historically, marketers have struggled with how to apply data principles and data processes – such as data modelling, data activation, and data insights – to content. This is especially true in European markets, where content is often already created and managed in multiple versions simply due to the abundance of languages and cultures on the continent. If you're already experiencing the pain of this, then managing additional variants for segments and channels and can quickly turn personalization into a nightmare.

So, by separating the content layer from the data processes, marketers can treat content in a more structured and scalable way, with much the same rigor they apply to data. For creatively oriented marketers, the framework has the additional benefit that their data-savvy colleagues (who are often in charge of personalization projects) can now much more easily comprehend the inner workings of what they may refer to as 'stupid channel activation' (yes, we've seen this rather belittling phrase used on LinkedIn). This alignment of content and data – along with the use of generative AI – will help

you and other marketers to finally put the prerequisites in place to create the personalized experiences you're envisioning.

WHAT ARE THE CX LAYERS?

The CX Layers model breaks down the process, from content and data collection to personalization. It consists of three key layers:

- The data layer is where customer data is collected, enriched, and processed into actionable insights. This includes the use of customer data warehouses (CDWs) and customer data platforms (CDPs) to create a unified view of the customer, helping marketers to understand who their customers are, what they need, and when they need it.
- The content layer is where all content is created, managed, and optimized. This doesn't just mean brand-led content, such as master content assets (discussed further below) and campaign content. It also doesn't simply mean product descriptions and blog posts. Rather, it includes all the customer-led lifecycle content that is meant to drive customer actions – offers, messages, nudges, calls to action, and more. This layer is responsible for content collection, creation, modelling, and activation.
- The personalization layer is where the magic happens – where the content and data layers merge to deliver personalized experiences. By applying decisioning of the insights from the data layer to the content in the content layer, brands can create personalized customer experiences that truly resonate across touchpoints and channels.

Figure 23 shows a fuller version of the CX Layers model, and the remainder of this chapter explores the parts of the model in more depth.

THE CX LAYERS: HOW DATA AND CONTENT FUEL PERSONALIZATION

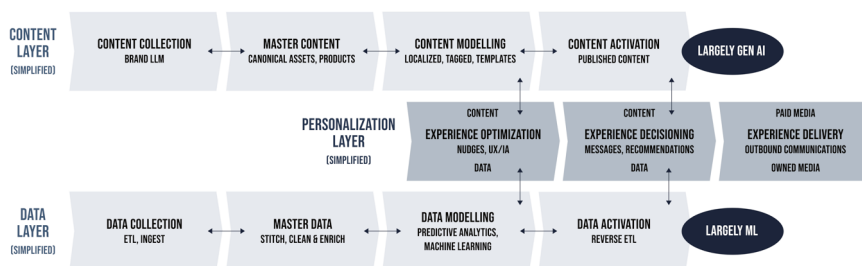


Figure 23. The CX Layers model.

THE DATA LAYER – FROM COLLECTION TO ACTIVATION

The data layer is the foundation for everything you're about to do with personalization. It defines what you know about your customers, how well you know them, and how ready that knowledge is to be put to work. Without it, personalization is hard to scale.

But this isn't just about collecting data. It's about turning that data into insight – and insight into action. That requires structure, governance, modelling, and activation. Below are the four key phases you'll need to master if you want to build a solid, scalable data layer.

1. Data collection

Data collection is where the process starts. You collect data from all the interactions you have with your customers – both the ones they initiate and the ones that happen passively in the background. These might include:

- What they click on, search for, and browse
- What they buy, return, or abandon
- What they tell you directly – such as preferences or quiz answers
- Where and how they engage with your emails, ads, apps, or website

You'll likely collect a mix of first-party data (what you observe), zero-party data (what customers tell you), and sometimes even third-party data (what others provide). The more meaningful and well-labelled this data is, the more value you'll be able to extract later on.

Data collection potential depends on your go-to-market model

How easily you can collect first-party data depends a lot on how you go to market (see *Figure 24*). If you're selling directly – like Netflix, Spotify, or digital-first retailers – you're in a strong position. You naturally gather behavioural and transactional data from each interaction.

But if you're a fast-moving consumer goods (FMCG) brand selling through marketplaces like Amazon, Miinto, or Zalando, you typically have little to no access to customer-level data. It's the resellers who own the transactions – not you. That puts limitations on automation and insight-driven marketing.

Brick-and-mortar retailers usually need loyalty programmes to gather in-store data at a personal level. In business-to-business, you're often better off, because customers typically identify themselves and receive invoices, giving you direct, structured data from the start.

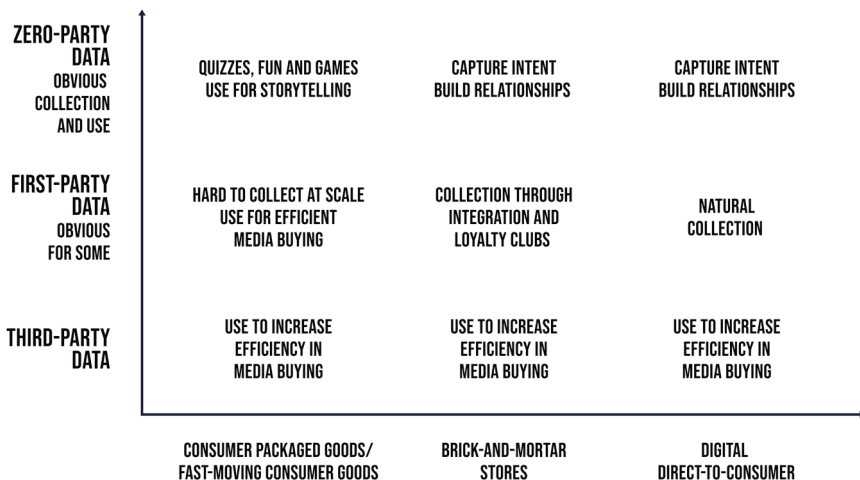


Figure 24. Brands from different industries have varying opportunities for collecting and using customer data.

Brand involvement and engagement matter for data collection

It's not just your business model that defines your data potential – it's also how often people interact with your brand, and how much they care.

Take Nestlé, which owns both KitKat and Purina. KitKat is a strong brand, but also a low-involvement product. Customers often make the decision in-store, maybe when the product is on offer. It's hard to gather meaningful first-party data here – maybe through games or sweepstakes, but not much beyond that.

Purina, being a pet food brand, benefits from high involvement. Pet owners care deeply about the health and wellbeing of their pets – which makes them much more likely to engage, share information, and respond to content. Same FMCG umbrella, but very different data collection and thus personalization potentials.

Scaling data collection

It's one thing to have the *opportunity* to collect a lot of first-party data. It's another to actually have that data. Scaling starts with asking for consent. In-store, online, in emails – always ask for permission and find ways to enrich the customer profile. Danish kitchenware retailer Kop & Kande added 15,000 new permissions through a simple Christmas advent calendar on its homepage – powered by supplier support and no-code configuration.⁴

Use monthly nudges to get profile updates. Show customers their own (outdated) information to encourage corrections. Use prize draws, GDPR prompts, or gamified flows to collect more meaningful data.

And once you've made it attractive to log in on your website, keep the log-in persistent and don't let it time out too quickly. Nemlig.com shows favourite and previous products to logged-in users in order to make the website attractive and more convenient to them. Amazon Style goes further: customers scan barcodes in-store and the products appear in their fitting room – and remain tied to their profile long after. It's a physical and digital data loop, done right.

Generative AI enables efficient scaling of qualitative data

As a novelty within data collection, generative AI has enabled efficient scaling of qualitative data such as customer support conversations (in text as well as audio), customer reviews, and user-generated content. Large language models (LLMs) can provide usable input from large bodies of text and audio. Imagine being able to ask someone who has memorized all

your customer service conversations what the main ten findings and improvement points are. Or what information customers need and when, for customer satisfaction to be improved. With generative AI this is now possible and should be considered an integrated part of your data-collection phase.

2. Master data

Now that you've collected the data, the next step is to make sure it's clean, tidy, and unambiguous. That's what this phase is about. Here, you clean the data up, remove duplicates, and stitch everything together into a single, reliable view of each customer. This includes resolving identities across systems and fixing small but critical issues – like country codes on phone numbers and mismatched email lists. If you can't combine customer profiles across channels, any insights that you subsequently generate will contain errors and ultimately you won't be able to personalize consistently. Tidying data up can become quite tricky, especially if you're working with different customer identifiers across systems as well as both known and unknown customers. This exercise is very much part of the master data phase – getting data that you can trust! It will ensure that you always know who you're talking to, regardless of whether they open an email, visit your site, or respond to an ad.

In full, you'll need to:

- Resolve identities across sessions and devices
- Merge datasets across systems – customer relationship management (CRM) system, ecommerce, service, etc.
- Apply consistent naming conventions and governance rules
- Choose where this 'source of truth' will live – whether that's a CDP, a CDW, or some custom solution

This phase is less about analytics and more about hygiene. But, even here, you might apply fuzzy matching algorithms or machine-learning-based identity-resolution tools to improve the accuracy of how profiles are merged.

Master data is what ensures that your personalization efforts don't contra-

dict each other across channels. It keeps your segments, your logic, and your customer experience consistent.

3. Data modelling

Once your data is structured and centralized, it's time to turn it into insight. This is where machine learning and predictive analytics – along with sound business logic inherited from your business model and value proposition – become core enablers. In this phase, you build the segments, scores, and models that will help you decide who gets what message, when, and why. These might include:

- RFM segmentation (see *Chapter 7*) and dynamic audiences
- Predictive scoring models: who's likely to churn and who's likely to convert
- Brand or category affinity modelling
- Propensity to respond to certain offers or content types
- Lifecycle stage detection

Machine learning allows you to move beyond simple rules and thresholds. Instead of segmenting manually, you can train models to detect patterns and predict future behaviour – whether that's purchase intent, price sensitivity, or interest in a specific brand.

You don't need to be an algorithm expert yourself. But you do need to work with teams or platforms that can turn raw data into usable, reliable predictions. While this is an interesting topic, it goes beyond the purpose of this book and is described fully in many other publications.

4. Data activation

This is where it all comes to life. Activation is about putting all that structured, modelled insight into action – so it can actually shape the customer experience.

In practice, this means:

- Making your segments and propensity scores available in real time

- Creating triggers for campaigns or messages based on model outputs
- Dynamically marking select customers for suppression of irrelevant communications
- Sending predictive signals to paid media or customer service tools

Advanced technology platforms are even using generative AI to help their data activation further along by providing rich and meaningful descriptions of segments and triggers. These descriptions can give creatively oriented marketers a much easier time activating the insights in a meaningful way.

The data activation phase is where your data layer hands over the baton to the content layer and personalization layer. If you've done the work properly, you'll now be able to react to the individual, not just the segment – and do so in a way that's fast, compliant, and scalable.

How much data is needed to make personalization profitable?

Think of personalization like fertilizer on a field. The larger your customer base and the more value per transaction, the better your return (see *Figure 25*). If you're a high-end retailer with a large database and a loyalty club, go for it. If you're an ecommerce business with a smaller list, then it might not be worth going beyond simple segmentation, product feed personalization, or cart abandonment tactics. And if your average order value is high – like in luxury or business-to-business sales – even a smaller list can justify deeper efforts.

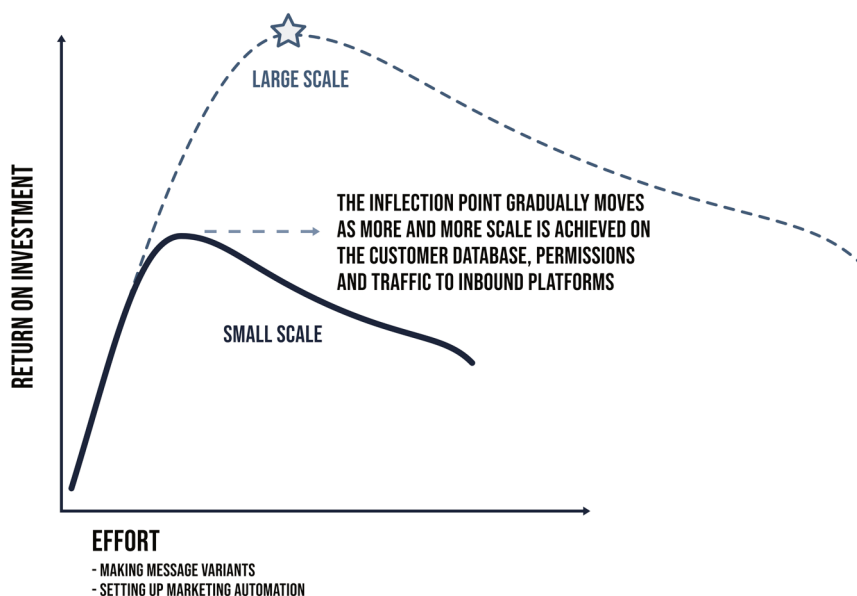


Figure 25. The additional effect of personalization is highly dependent on the scale of your database: the larger the database, the more you can justify investing in personalization.

THE CONTENT LAYER – FROM COLLECTION TO ACTIVATION

If you've worked with personalization before, you've probably noticed something: your data might be in pretty good shape, or at least you sort of know what you need to do to achieve this. After all, you've probably already had a dozen CDP vendors contacting you this week alone. But how about your content? Are you at the same level of enlightenment here? Probably not so much.

Unlike data operations, content operations are rarely streamlined. Content lives in disconnected documents, translation files, PowerPoints, content management systems (CMSs), or even just in people's heads. You may have the insight to personalize – but not the content to act on it. And that's a problem. Because without structured, modular content, personalization simply can't scale.

The content layer is your way out of that mess. It helps you envision how to collect, master, model, and activate content in a way that supports both

personalization and your general marketing communications – across channels, segments, and languages.

Just as application programming interfaces (APIs), machine learning, and predictive analytics play an important role in the data layer, you'll find that LLMs and generative AI play an important role in streamlining your content layer. They can help you produce and repurpose content and variants at scale – across segments, languages, and channels – so you're not starting from scratch every time and can easily get that one suitable image or piece of text on the fly.

Just like the data layer, the content layer unfolds in four phases.

1. Content collection

This is your starting point – gathering all the pieces of content you already have (or need to create). That includes brand assets, product descriptions, editorial content, campaign copy, and customer-facing messages like nudges, calls to action (CTAs), and offers.

It also means identifying where that content lives: in CMSs, digital asset management systems, spreadsheets, or maybe someone's inbox. If it's going to be used in your marketing and ultimately in your personalization, you need to know that it exists and where it is.

2. Master content

Once you've gathered your content, the next step is to clean it up and structure it. This is your 'single source of content truth' – the equivalent of master data, but for core assets and messages.

It essence this means defining and agreeing on canonical versions of core brand assets such as your value proposition, values, and ideal customer profile(s) or target personas. The same goes for brand guidelines, tone of voice, and corporate visual identity guidelines.

Generative AI can greatly help you (or at least make suggestions) in creating canonical master content based on the material you collected in the previous phase. Especially for text, this is fairly easily done through ChatGPT or similar services from Google and other vendors.

Sometimes, canonical content only exists in summary form in an internal PowerPoint presentation. In such cases, we've seen successful approaches where the authors have presented and recorded the full presentation, complete with all the ad hoc observations and additions that are only in their own heads. This is subsequently transcribed (using AI) in order to create a complete text version.

Gathering master content in a brand LLM

The first step, as outlined in the first two phases above, is to get all your canonical master content in place and have all the necessary people agree that it is correct. A next (optional) step could be to put this master content into what we call a brand LLM, as we've seen innovative companies start to do.

For master content in text format, this can be fairly easily done – for example, via an AI assistant such as CustomGPT or more professionally perhaps through the use of OpenAI Platform or a similar service. You start by uploading all master content either by simple file upload or more preferably in a dynamic way, such as through retrieval augmented generation⁵. You can then train your brand LLM on how to prioritize and inter-relate the master content files. This will enable the next phase of the content layer, namely content modelling.

For images and video, this process is harder but still doable. Nordic company Strålfors, for instance, has succeeded in building a brand LLM to generate images that all comply with its corporate visual identity guidelines. In fact, all images on the company's website (www.stralfors.com) are generated using this internal service.⁶

It is not only the core brand assets that belong to the master content category. Product descriptions and other similar content should also be included here. During the research for this edition of *Hello \$FirstName*, we came across Flying Tiger Copenhagen, which is using generative AI to automatically help craft product descriptions for its constant influx of new products. Naturally, guardrails such as tone-of-voice guidance plus lists of do's and don'ts have been put in place to minimize the work needed for quality assurance.⁷

3. Content modelling

With your master content gathered and tidied up, and potentially with a brand LLM (or several LLMs) now in place for your master content, it's time to define how you model your content into multiple activation use cases. Content modelling is the process of setting rules and developing templates to break your messages into components that can be recombined and reused across scenarios.

This includes:

- Defining templates with variable placeholders
- Defining modular structures (e.g. header, body, and CTA)
- Tagging content with relevant metadata for smart retrieval
- Defining rules for localization
- Defining rules for channel repurposing

Here, generative AI can again assist by generating message variants based on your master content and your brand LLM. Content modelling ensures that your content is operationally scalable. Many CMS vendors now have built-in capabilities to partially or fully support this.

An example of a company that has successfully deployed content modelling is the Danish Airbnb competitor Landfolk.com. Landfolk.com has fully automated the process of collecting content from holiday home owners (hosts) plus publicly available information from the relevant area, and converts this into master content in the form of holiday home listings. On top of that, the company has defined in its content modelling framework how certain pages, such as a destination description page for the North Sea, vary depending on the culture to which they are localized. Thus, the destination page is not translated – it's truly localized through the use of AI as, for example, Germans may value certain things about the North Sea more highly than the Danes or the British. Landfolk.com has taken the brand LLM concept one step further than most companies by not only deploying AI assistants for employees to use but also deploying agents that act autonomously based on both data and output from generative AI.

4. Content activation

Now it's time to put your content to work. Content activation is about getting the right content into the right format for users of your inbound platforms such as your website(s) and your app(s).

It includes:

- Making content available across inbound platforms such as websites and apps
- Syncing modular content with your marketing platforms (e.g. email service providers, CDPs, and CMSs)
- Making content available to decisioning engines
- Feeding personalized content into outbound campaigns or inbound experiences
- Ensuring content appears correctly across channels and devices

Is generative AI a prerequisite for personalization?

During the research for this edition of *Hello \$FirstName*, we discussed extensively whether generative AI could be considered a prerequisite for personalization. Our conclusion is that *content* is definitely a prerequisite – and, without an efficient content layer to deliver this, you will never reap the full benefits of personalization. And yes, generative AI is definitely a cornerstone in making your content layer as efficient as you'd like. So, while you can definitely get started with a content layer without generative AI, applying this technology is a prerequisite if you want to achieve the full potential of personalization (e.g. by deploying AI assistants and potentially also autonomous AI agents).

THE PERSONALIZATION LAYER

An efficient content layer meets an efficient data layer and they jointly become fuel for the personalization layer. The more structured and efficient your content layer, the easier it is to automate, localize, and scale your marketing and ultimately also your personalization.

While a detailed description of the personalization layer is arguably outside the bounds of a discussion of the *prerequisites* of personalization

(the topic of this part of the book), we'd still like to give you a brief introduction to this layer in this chapter, as it is an excellent segue into discussing the intersection between personalization on one side and having a generally sound CX on the other. And having a generally sound CX (sometimes obtained through conversion rate optimization (CRO)) should indeed be seen as a prerequisite for personalization. In *Chapter 20*, on the topic of marketing technology, we will circle back the personalization layer.

The personalization layer is fuelled by the content layer and the data layer

The personalization layer is where everything comes together. If the data layer tells you *who* you're talking to, and the content layer provides *what* to say, then the personalization layer is about *when*, *where*, and *how* that message gets delivered.

This layer translates insights and assets into action, whether you're optimizing the average customer experience to the unknown customer, a personalized website or app experience, an outbound campaign, a marketing automation flow, a triggered notification, or even an app. It consists of three phases that guide how you optimize, decide on, and deliver personalized experiences across touchpoints.

1. Experience optimization

This phase is about refining and improving the CX across all channels – not just your website. While it shares techniques with CRO, the scope is broader. It includes A/B and multivariate testing, personalization hypothesis building, journey mapping, and iterative improvement.

At this stage, you define what success looks like: whether it's higher engagement, more conversions, or better customer satisfaction. You're optimizing not only for performance but also for relevance and value – ideally from the customer's point of view. We'll touch more upon CRO in the next chapter.

2. Experience decisioning

This is where decisions are made – often in real time. This is basically where the bowtie knot is tied and it is decided how your messages and

content feeds are personalized for each customer. The output is personalized messages (CTAs, nudges, next best experiences, and offers) and personalized content feeds (either product recommendations or content recommendations).

Experience decisioning includes:

- Rule-based targeting (e.g. segment X sees message Y)
- Machine learning models and predictive analytics (e.g. next best experience)
- Recommendation and decisioning engines
- Customer journey orchestration platforms

The goal here is to match customer insights with content with the aim of supporting business goals. The decisioning feeds into both the content activation phase of the content layer (deciding how to personalize inbound platforms) and the next phase of the personalization layer.

3. Experience delivery

Once the decision is made, it needs to be delivered to the relevant customers who aren't reached on your inbound platforms. As such, experience delivery is about pushing the personalized experience into outbound channels: your email platform, app, call centre system, or ad network.

At this stage, you rely on integration and timing:

- Delivering the right content variant to the right customer
- Ensuring consistency across touchpoints
- Handling suppression logic, channel priorities, and frequency

This is also where the constraints of technology, bandwidth, and permissions become real. Execution doesn't happen in theory – it happens in the messy, multi-system reality of your martech stack.

You now have an understanding of all three CX layers: the data layer, the content layer, and the personalization layer. The content layer and the data layer are prerequisites for personalization, which happens in the personalization layer. During the research for this book, we encountered countless

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marketing professionals working across the two disciplines of (website) CRO and (website) personalization, with the lines between the two being somewhat blurry. In the next chapter, we'll dive a bit deeper into this intersection, in the process exploring the first phase of the personalization layer (experience optimization) more deeply.

CHAPTER 23

CONCLUSION

Personalizing by using the first name of customers in direct mail and emails suddenly seems so basic. And indeed it is. We've now covered serious ground in coming to understand personalization at a deeper level and also how the groundbreaking technology of generative AI is impacting this field.

Our initial goal with this book was to define personalization in a way that was broad enough for practitioners to use across marketing disciplines. The definition paved the way for the Bowtie of Personalization as a model for understanding the concept and the parts that make it up. We then looked at how these parts come together and create value in the three marketing disciplines of campaigns, marketing automation, and inbound platforms (see *Figure 46*).

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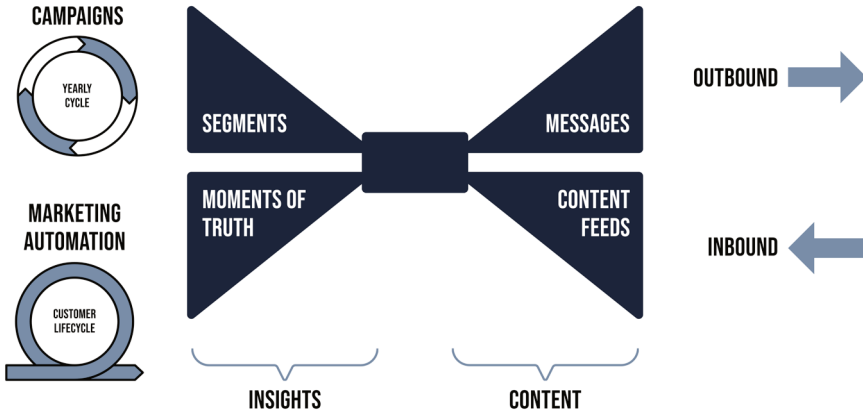


Figure 46. The complete Bowtie of Personalization.

But what could and should you build, and in what order? To help you on this journey, we introduced the Personalization Cards and the Personalization Canvas as tools for you to use with your teams to strategize, ideate, and plan for personalized customer experiences. Again we encourage you to explore this with your team. Start at www.omnichannelinstitute.com/resources.

We summarized the findings into three levels of maturity for the scope of personalization across the three disciplines in the form of the Pyramid of Personalization – or at least the front end of it.

Pausing for a bit, we looked at the prerequisites for making personalization the right choice of communication tactic. What needs to be in place before you can double down on it? Here we introduced the CX layers as a framework for understanding how insights and content become ready for use in personalization and the roles machine learning and generative AI can play in this.

Assuming these prerequisites were at least somewhat in place, we then moved on to cover how you can support personalization from an organizational point of view and make it efficient at each step. How is the front end of the pyramid supported by the back end? In other words, we gave our answer to the question of how you can work with people and skills, technology, and governance to make personalization across channels

become truly game-changing. *Figure 47* summarizes the front and back ends of the pyramid.

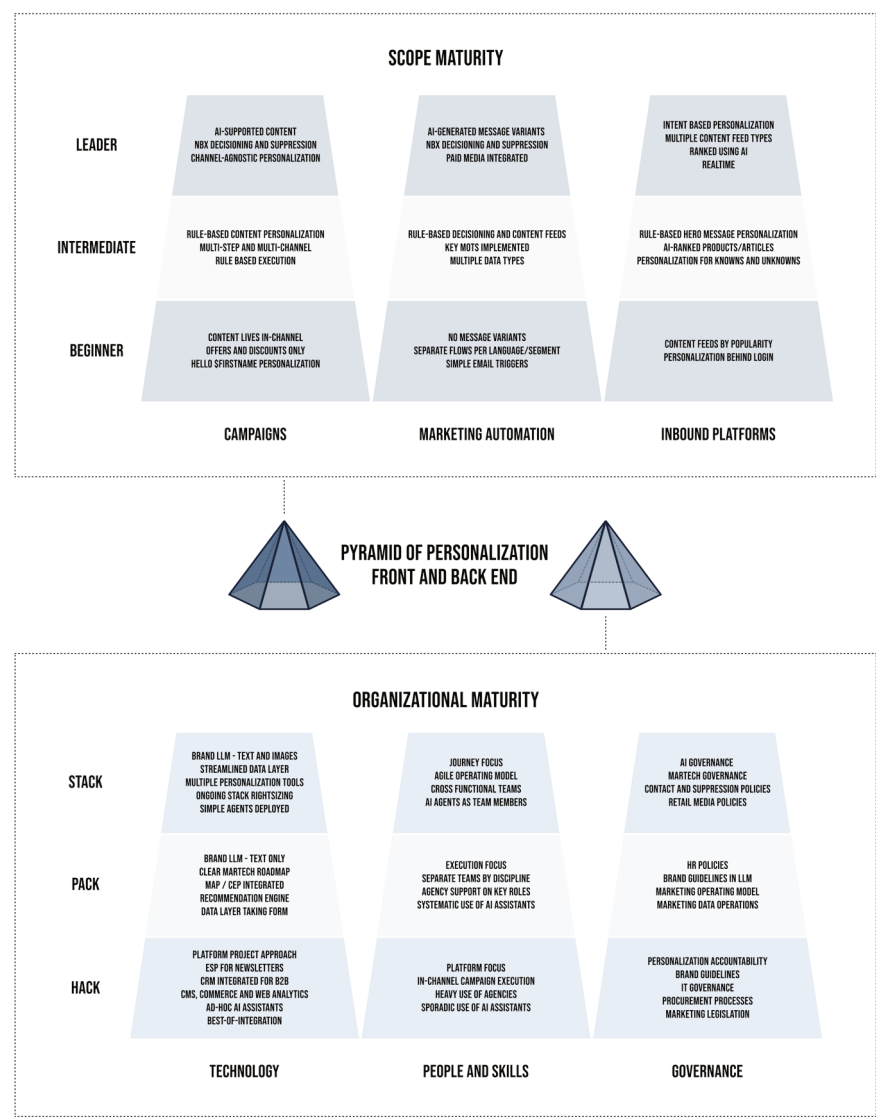


Figure 47. The complete Pyramid of Personalization.

We hope you’ve enjoyed the ride and found the concepts and models in this book useful, and that you will make use of the tools that accompany

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this book. If you haven't already, check out the Personalization Cards and the Personalization Canvas at www.omnichannelinstitute.com/resources. Our goal is for you to be able to embark and excel on the journey towards a truly value-creating personalized customer experience for customers and your company alike.

EPILOGUE

WHEN YOUR CUSTOMER SENDS AN AGENT

In the pages leading up to this point, we've explored how to create meaningful, personalized experiences across channels, campaigns, and touchpoints. We've talked about data, content, and the orchestration that brings it all together. We've introduced the Bowtie of Personalization, the CX Layers, and the Pyramid of Personalization to help structure that work.

But what happens when the customer never shows up?

What happens when they send an agent instead?

Large language models (LLMs) are already reshaping the landscape. ChatGPT has launched agent mode. Google is answering more questions directly on its results page. And, more importantly, behaviours are starting to change. Many customers no longer just browse in the traditional sense. They're also delegating – asking systems to search, compare, and soon even transact on their behalf.

This could profoundly alter the flow of traffic, the role of the website, and the very point of contact between brand and consumer.

Marketers may no longer be optimizing for search engines or for user interfaces. They may be optimizing for agents. Feeding structured content into the LLMs. Training seller agents to negotiate with buyer agents. And

potentially losing the direct line of sight to the actual consumer in the process.

For commoditized products – where the lowest price wins – this model may work well. But for emotionally anchored brands, it will challenge everything we’ve built around branded experiences, loyalty, and long-term value.

If your flagship store is replaced by an invisible transaction between agents, where does storytelling go? Where does the moment of delight happen? What becomes of the brand?

It’s possible that consumers will begin to segment their behaviour too – relying on agents for utility-driven purchases, but still visiting brand sites when they want to be inspired. Still signing up for loyalty programs. Still responding to personalization – not just of price, but of message, tone, and experience.

And it’s possible that some consumers will more carefully choose agents that reflect their values. Agents that aren’t financed by advertising. Agents that factor in long-term preferences and who the person wants to become – not just what they want to buy.

That is not today’s reality. But it could be tomorrow’s.

And in that world, your job as a marketer may change. You may be building for an audience of agents – bots that consume your content, check your policies, browse your products, and buy only if the API responds as expected. But you’ll still be building for humans too. Because behind every agent is a person. A person who still forms emotional connections, chooses whether to trust you, and remembers how you made them feel.

The frameworks in this book still apply. They just extend into a new layer – a layer where personalization is not just about orchestrating communications with people but also about orchestrating interfaces to the systems people trust to act on their behalf.

The customer journey is not over. But it may now begin with:

‘Hey, agent, get me something good.’

ABOUT THE AUTHORS

Rasmus Houliind, the main author of this book, is a well-known writer, speaker, and consultant in the Nordics. After ten years of consulting within digital marketing and marketing automation, in 2015 he published his first marketing book (in Danish), *Hvis det handler om mig, så køber jeg!* (*If It's About Me, I'll Buy!*). In 2019 he followed up with the omnichannel marketing bestseller *Make It All About Me* from LID Publishing. Since then, he has evangelized omnichannel marketing and marketing automation from his position as Chief Experience Officer with the Nordic martech company Agillic. He has worked with organizations such as Red Cross, PureGym, Tivoli, Matas, Bolia, SPORTMASTER, Imerco, Varner-Gruppen, Andel Energi, and Telge Energi.

Frans Riemersma has spent the past two decades researching martech capabilities, stacks, and vendors together with over 467 global members of his so-called MartechTribe (www.martechtribe.com). The resulting database contains no fewer than 15,384 vendors, 1,533 real-life stacks, and 4,537 martech-wide requirements. This all forms the basis for publishing vendor landscapes, benchmarking and selecting technology for companies, and designing martech stacks for companies such as HP, Adidas, Audi, BASF, Unilever, Philips, ABN AMRO, Pandora, Standard Bank, Swift, and Volvo. This background puts Frans in a unique position to explain how organizational maturity within personalization looks from the

martech and governance angles. Consequently, Frans contributed considerably to *Part Three and Part Four*.

Arild Horsberg has been in the personalization business for more than 30 years and is considered the ‘grand old man’ in this arena by many Norwegians. In 1992, Arild started Bas – for many years the largest agency within marketing automation, analytics, and personalization in Norway. In 1997 he founded Dialogkonferansen, which has grown to become the leading conference on CRM, personalization, and customer experience in the Nordics. In 2024 Arild joined forces with Forte Digital, and is now managing director of Forte Optimize, a fast growing agency within martech, personalization, SEO and SOME.

Mattias Andersson is co-founder of the multiple-award-winning martech consulting company Milton Insights. With a strong background in customer relationship management (CRM) and data-driven marketing, he is a frequently engaged speaker and serves on several Swedish and international marketing award juries. Before founding Milton Insights, Mattias held senior roles including Head of CRM Analytics at Scandinavian Airlines, CRM and Customer Club Manager at Twilfit, and Head of Analytics at the mobile operator 3. He also contributed to the book *30 Advice from 30 Greatest Professionals in CRM and Customer Service in the World* (2017). Additionally, Mattias has been recognized as one of Sweden’s 500 most influential tech investors.*

*

NOTES

INTRODUCTION

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