Digital Personalization: Taking an Agile Approach

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Introduction

Personalization is not a piece of software, nor is it a feature of one. Successful personalization is a result of people, process and technology, and in that order. Both the people who are building personalized experiences and the people who they are being built for must be at the center of any personalization initiative. In fact, think of personalization simply as a relationship and conversations between individuals, as that's really all it is. However, it's a series of relationships built at a large scale, and doing things at scale requires both processes and technology.

This book is meant to be a series of ideas and prompts that will help you to think about the right things as you set out on your journey to build more personalized digital experiences. Some of the suggestions and practices might not be right for your organization and that's fine. These ideas are meant to be adapted to your goals and your situation. Embrace failures, learn from them, improve, and repeat until the technology and process fade away. When that happens, your team will be engaging in meaningful, lasting and personalized relationships with all your customers.

How To Build a Successful Personalization Team

Building great digital experiences, as with everything else, begins with people. While an individual may produce a masterpiece alone, most great achievements are the result of skilled individuals working together as a team. Successfully building and delivering personalized experiences on the web or anywhere else is no exception to this rule, and it is rare to find one person who can achieve this independently. For this reason, organizations who wish to create relevant personalized experiences for their customers must first establish the right team.

Since personalization involves multiple departments within an organization, key people from different areas of the business with various skill sets are needed to make up the personalization team. The exact makeup of this team will vary from organization to organization, and even from project to project, but many similarities and best practices already exist.

The best way to start building your personalization team is to break down personalization efforts by skill set: creative, data analysis, and technical.

Creative

Before personalized experiences became the standard, content was created to be as generalized as possible. It was an accepted practice to have every single person experience a website in the exact same way. However, this no longer meets customer expectations. With the availability of personalization tools that serve up unique content based on segmentation, there is a continuous need for targeted content. Depending on how ambitious your personalization goals are, you may find a need for a lot of new content.

To meet this immense demand for tailored content, you will need to consider putting individuals on the personalization team who are in tune with messaging and positioning and can produce copy, creative assets, and other forms of multimedia (photos, video, etc.). These team members will create variations of a piece of content for a given segment. These variations will be used in A/B tests to find the best variation and to learn more about a particular segment. The ability to experiment with new content allows for creativity within the team to flow more freely and experiences to improve over time.

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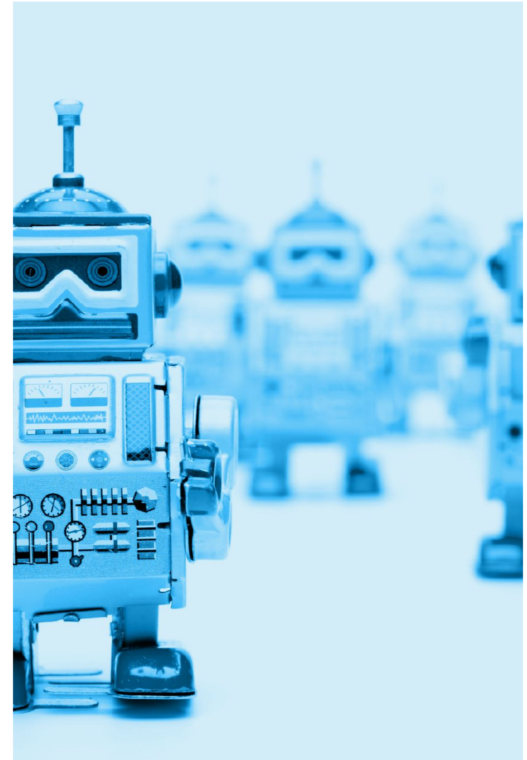
Technical

Once the content has been created and a determination has been made about what to show and who to show it to, the next step is the technical implementation. Depending on what personalization tools are in place and what experiences are being created, technical team members may vary from someone who has a solid understanding of the personalization software to a developer who builds custom functionality.

The Personalization Owner

Once you have a team and technology in place, you will find no end to the flow of ideas. Every touch point within a customer journey can be optimized and personalized. Your customer base can be segmented across hundreds of dimensions and the team's time can be spent in a near infinite number of ways. All of this requires that the team's priorities are well managed so that their energy is focused in the right areas. We call the individual responsible for this organization the personalization owner.

The personalization owner may come from any number of backgrounds including management, marketing or IT. The key element to this role is not management per se, but rather ownership of success in personalization. If all other work within personalization gets outsourced, this is the one person who should be sitting within the organization and ideally dedicated to personalization full time. Harvard Business Review, in a play on the role of product manager within software development, similarly refers to the "journey manager" as the central figure in a customer journey-focused "scrum team." The personalization owner works to understand the priorities of the team and help to decide what should be done first, second and perhaps last or never. Extending the analogy within the software world, the personalization owner can be compared to the product owner on agile teams who is "responsible for defining and prioritizing" the work that needs to be done (referred to as a "backlog" in the agile methodology).



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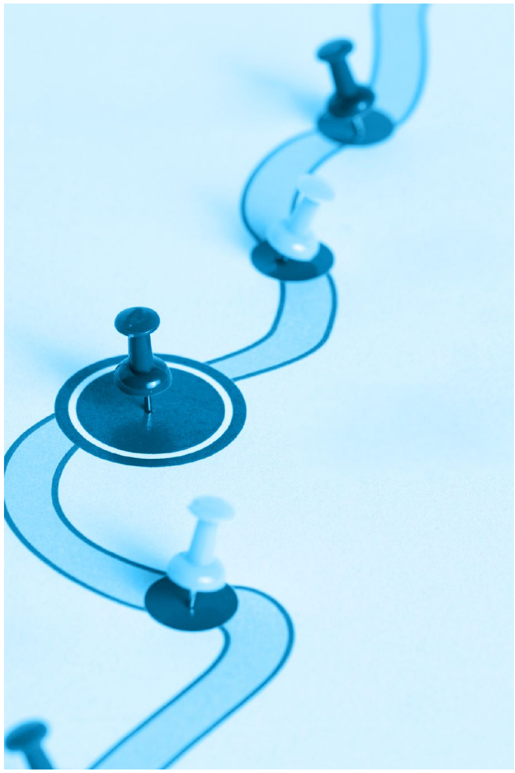
Cross-Functional Teams

As much as possible, the personalization team should be cross-functional and autonomous. This means that they have both the technical and creative abilities as well as the authority to improve personalized experiences without getting blocked by competing priorities within other departments.

Departments that may be part of the personalization team include IT, demand generation, marketing operations, content marketing, and creative. In the November 2015 Harvard Business Review article “Competing on Customer Journeys,” this team is “execution-oriented, fast, and agile, constantly testing and iterating improvements. Collectively, the team members work to understand customers’ wants and needs at each step of the journey and make taking the next step worthwhile.”

While moving all of the right people into a new department or business unit for these purposes might be ideal, it is certainly not necessary. Think of this team as a task-force for this project. Some of the individuals will be full-time while others are part-time. The important part is that they meet together regularly and function as one unit, ensuring that everyone has what they need when they need it in order to deliver real value at regular intervals to your customers. The technology and process do not matter if you don’t have the right people in place or if you don’t have resources dedicated to doing personalization.



Aligning Personalization Objectives with Business Goals

Personalization is a top priority for businesses today, regardless of industry. To make sure that any personalization program within your organization is a glowing success, it must be aligned with the company's larger vision and strategic goals. Without this alignment, the reason for implementing a personalization program in the first place can get lost, and personalization can do as much harm as good.

The danger lies in optimizing toward a minor objective, such as increasing clicks on your website, because that type of strategy has the potential to cannibalize more important goals, such as increasing customer satisfaction or customer lifetime value. A perfect example of this is "click-baiting." Sensationalist headlines—"You'll Never Guess What This Digital Marketer Posted on Her Company Blog!"—entice someone to click an article, but the actual content may or may not be relevant to the end user. And even if the article is on target, chances are it's not nearly as exciting as the headline would suggest. While this practice will most likely increase clicks, it is just as likely to mislead and frustrate the visitor. In contrast, using Affinity Audiences in Google Analytics to determine what additional article topics your audience might be interested in helps you create content that's better received. Paired with the right metrics (for example, retention or churn), this can ensure that your personalization tactics have a positive effect on the bottom line.

But achieving all of the milestones laid out by your organization is more complex than just providing personalized content. To reach them, you need to look at the entire process that leads up to reaching your business goals. What strategic initiatives need to be in place? What projects will best showcase those initiatives? What tactics will make those projects successful? And how will it all be measured and evaluated to ensure that the right decisions are being made? Let's break it down:

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Business Goals

At the highest level of the organization are a small number of business goals, which are established at the C-level and communicated throughout the organization. Business goals are usually instituted as part of an annual or multi-year plan. In a typical for-profit organization, increasing revenue is the most obvious business goal. More detailed goals may include:

- Reduce costs by 20 percent
- Increase brand awareness by 20 percent
- Increase overall customer satisfaction rating to 95 percent

It is critical that these overarching business goals have a clear way to be measured and that the measurements are linked to the various systems used to drive personalization. As mentioned before, without proper measurement of high-level business goals, optimizations can easily go astray. Business goals should be top of mind when going through the shorter cycles listed below.

Strategic Initiatives

Business goals are not necessarily actionable as they tend to be too vague. For instance, there are many ways to reduce costs in an organization, including reducing the size of the workforce, instituting telecommuting, reducing energy use, curbing travel expenses, etc.

Strategic initiatives are more specific than broad business goals and can easily be broken down into a number of projects that can be executed upon. Examples of strategic initiatives aligned to the business goal of increasing revenue include:

– Grow new customer acquisition by 40 percent

– Reduce customer churn by 10 percent

– Shorten the sales cycle by one month

– Increase pricing by 15 percent

These too should be measurable for the purpose of reporting on results and tracking achievement. Determining what strategic initiatives are most appropriate for your business can include a complex analysis involving many teams and sometimes external consultants.

Each project should have clear alignment with At least one strategic initiative, though in some cases it might map to several.

Projects

Once your strategic initiatives have been identified, it is time to establish a number of projects which support them. Each project should have clear alignment with at least one strategic initiative, though in some cases it might map to several. By aligning to an initiative, the project is also aligned to at least one business goal and is therefore justifiable work that achieves business value.

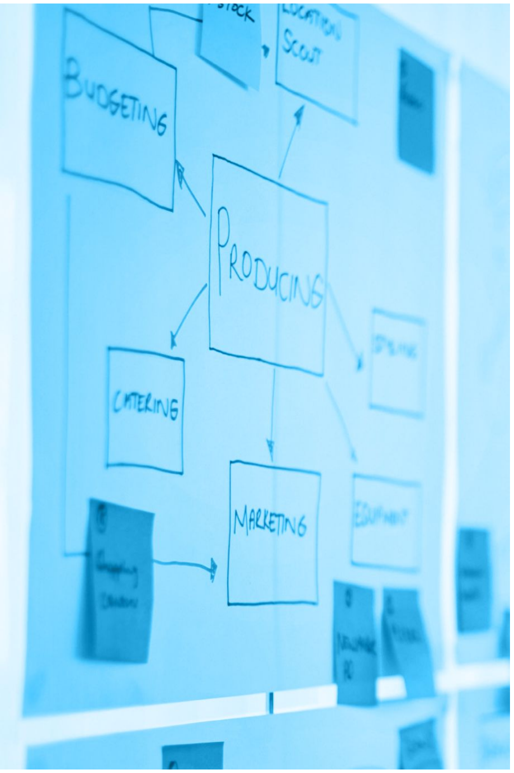
Let's take one of the above strategic initiatives—Grow new customer acquisition by 40 percent. Examples of projects within this initiative may include:

– Increase website conversion through personalization

– Develop and implement a content strategy for individual buyer personas

– Increase trade show and event presence

Every project must have a team. In some cases, a team may be responsible for more than one project, but if you can have one team per project, they will be able to focus far more effectively. The team should be constantly learning from and evaluating the success of projects to ensure that they are moving your organization towards the larger business goals.



Tactics

Once your strategic initiatives have been identified, it is time to establish a number of projects which support them. Each project should have clear alignment with at least one strategic initiative, though in some cases it might map to several. By aligning to an initiative, the project is also aligned to at least one business goal and is therefore justifiable work that achieves business value.

Once a team has been assigned to a project, it's time to execute. What tactics will you use to accomplish this project? If you are implementing personalization on your website to increase conversion, potential tactics (or ways of personalizing) may include:

– Personalize based on visitor stage in the buying journey

– Personalize based on visitor location

– Personalize based on visitor interests

Tactics may be larger than any one single task, so if they need to be broken down further, do so. Your goal should be to get to bodies of work that can be planned, prioritized, easily defined, and easily understood by the team.

Evaluation & Iteration

There is no strict definition of what defines a strategic initiative versus a project versus a tactic. The point is to break down your work and ideas into small manageable pieces and then iterate. Do meaningful work quickly, evaluate its effectiveness, and learn from it. While business goals should remain constant, strategic initiatives and associated projects should be evaluated and iterated upon regularly. Never be afraid to make anything from a small course correction to large sweeping changes.

Learning from doing is what agile personalization is all about, and sometimes your best learnings are from failures and your best move could be a significant pivot.

Alignment Above All

Regardless of how skilled and efficient your team is, strategic alignment on the correct goals is absolutely essential for any personalization program. If you are in a position to set those goals, then ensuring that they are up to date and communicated throughout the organization is a critical step. If the business goals are being handed down to you and your team, make sure you understand both the letter and the spirit of the goals so that you can optimize towards the right outcomes.

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Putting agile personalization Into Practice

Author Benjamin Erwin once said, “Building a robot that works involves building a robot that doesn’t work and then figuring out what is wrong with it.” The software world has used terms like agile and lean for this approach for some time. Fast forward to today and agile marketing has also become a hot phrase. The core idea is simply to break large projects into smaller, more manageable tasks, completing some of those tasks, then pausing briefly to reflect on your progress. Learn all you can, then repeat. If you can put this concept into practice in your own organization, the results will astound you.

Personalization is not exact; a lot of it involves trying different things and seeing how well they work. In order to achieve success with personalization, you must iterate quickly. The more you iterate, the faster you learn. The number of elements that you can base personalization on are nearly infinite, so you need an approach that allows you to tackle bite-sized chunks of work while still seeing meaningful results. We call this approach, which allows your team to start small, learn quickly, and achieve meaningful results as early as possible in the process, Agile Personalization.

There are three main components to this approach. The first is individual tasks or short, meaningful chunks of work, which an agile software developer may refer to as a story. The second is a backlog, or prioritized list of those tasks. Finally, there is a fixed period of time in which you plan to iterate, known as a sprint in agile, but is basically just an iteration, or cycle. These three simple pieces form agile in a nutshell, and when applied to personalization, can help solve many of the challenges faced by marketers today.

Tasks

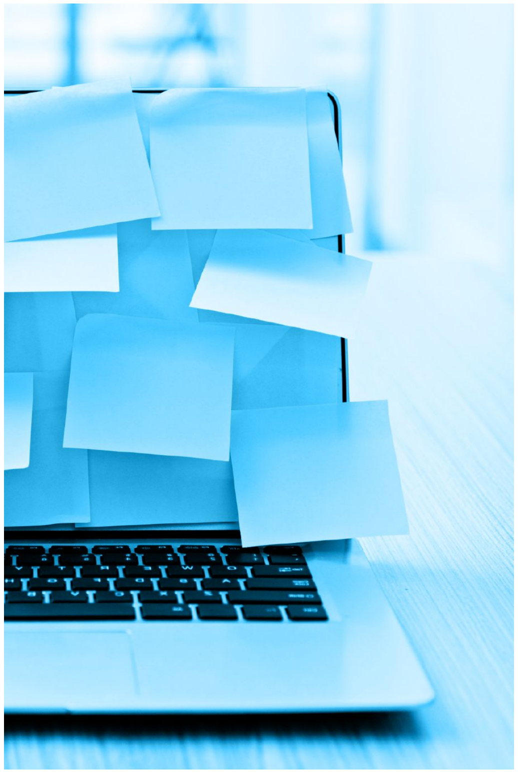
A task is a small, self-contained piece of work that delivers value. These are the central units that you'll be planning with. Generally, it should be something that one person can accomplish in a few hours to a couple of days. A task could be something like "put a new banner on the home page for returning visitors" or "analyze the results of last week's A/B tests." These are manageable chunks of work that deliver value. If the first task you do is also the most likely to move you towards your end goals, then you're going to see returns on that work quickly.

So where do tasks come from? One of the best ways to come up with tasks, especially when you're starting out, is just to sit down with your team and other stakeholders and brainstorm things you might like to do. Feel free to capture a bunch of ideas that you might not ever do, as you can prioritize them and determine the best ones to spend your time on later.

Backlog

Remember how you can have an infinite number of tasks? Well, you won't write an infinite number down, but you need a place to keep all of your great ideas as you have them. There is plenty of technology available for organizing these lists, but for now simply imagine a wall with sticky notes on it. Write down a dozen or so tasks, then prioritize them so that the one you want to do first is at the top, the one you want to do next is right below it, and so on. Prioritizing this list is the responsibility of the personalization owner and can be as much art as it is science because you'll need to balance the priorities of different parts of the business, as well as balance things like expected payoff and level of effort. But don't let this bog you down. While there are many frameworks and systems for doing this prioritization, just go with your gut to start out with.

If you want a tool to help you do this organization, there are many available. A simple approach is to put all of your ideas in a Google Sheet. Purpose built tools like Aha!, Asana, Trello, or JIRA could all be used for this as well. Remember, don't worry about the jargon; just get a tool that's easy to understand and seems to meet your idea of what is easy to use. If your organization already has a project management tool in place that you're comfortable using, you can start there.



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Sprint

A large financial institution is in the process of implementing a personalization strategy and have spent the past nine months reworking the taxonomy terms attached to all of their content, with no return on investment to show for it yet. Having a good content strategy and properly tagging all of your content can have a large payoff when it comes to understanding user behavior and personas and implementing personalization. But there are unquestionably smaller projects that could have been tackled with just a handful of terms, or even personalization that doesn't rely on past behavior at all, such as some simple messaging geared towards customers on mobile devices or from certain geographies. These are relatively simple to set up and could have proven out the value of personalization early on while other larger tasks are worked on in the background.

Two weeks is a good length of time for an iteration, or what agile developers would call a sprint. It could be anywhere from one to three weeks, but should not be longer than that. The key to a sprint is to have something tangible and of value to show at the end of each one. This allows you to build momentum, show success to the organization, and feel good about the work you're doing. It is also a huge help for those who tend to procrastinate on larger projects. Most importantly though, it allows you to learn quickly from successes and failures and correct course when the work you've done is lacking in any way. For example, if you spend two weeks building some tests for a particular persona or segment and then discover that the messaging that you're using is not increasing any of your key metrics, you can try different messaging two weeks later and you've learned a lot and moved towards value. If you spend three months redesigning and implementing your website, ad campaigns, and email campaigns using that failed messaging, then you've lost a lot more time, money, and resources. You also have very little to show for those efforts, except for the learning that you've produced, which could have been done in two weeks.

There are numerous benefits to having short, planned iterations, one of which is an extremely valuable concept known as the "retrospective." That's just a fancy term to say that at the end of each sprint, you sit down with your team and talk about what worked, what didn't work, and how you can improve the work that you're doing. This rapid and regular introspection can help to uncover organizational bottlenecks, gaps in skills, process improvement opportunities, and more. It also helps you determine how long tasks take, allowing you to plan more effectively in the future

Choosing the Right Framework for Your Personalization Ideas

The next step is coming up with ideas of what to personalize. Personalization ideas can touch many areas of the experiences you're creating. You can focus on different audience segments. You can brainstorm ideas for content. You can focus on different areas of the marketing funnel. You can create a list of how to keep existing customers interested and coming back. Or you can start thinking about what metrics you want to pull first to better inform your decisions. Once your team has generated a few dozen, or even a few hundred ideas, you may find that it's both challenging to organize them all, and that the pace of generating new ideas slows down some. This is where frameworks come in.

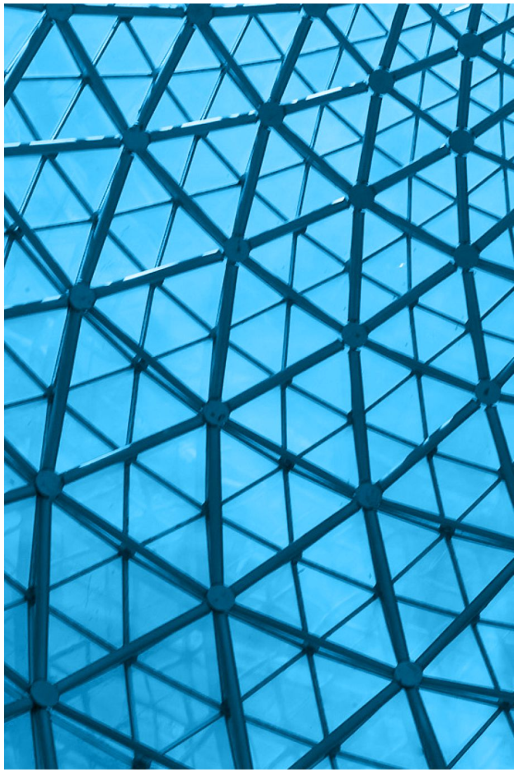
There are a few different frameworks that can be used to both generate and organize personalization and optimization ideas to help you stay on target. You can choose to use one or more of these, or find another that works best for you, but having a framework can make it far easier to keep the ideas flowing and organized.

The Mind Map

The idea is simple, and has been around for a long time: Start with what's on your mind and write it in the center of a piece of paper (or on a whiteboard, or using software, etc. — you get the idea), then write related things around it and draw lines between them. After the first round, draw more related ideas next to the new words and draw lines between those. The end result is you get things in your head onto paper and trigger some new parts of your brain while you're at it, making you more creative and capturing the things you've been thinking about.

Admittedly, this isn't truly a framework, but it's a good place to start if you have dozens of ideas floating around that have a natural structure to them. For personalization, they may take the form of segments, personalization rules, pages you want to personalize, and so on. If things start breaking into categories, try circling words with different colors or drawing different shapes around each.

If you've captured everything you were thinking but then run out of steam, tat's okay. If you've been staring at the paper for a few minutes without writing anything else down, walk away for a while. When you come back, go ahead and take those ideas and move them into your task/story collection software, adding additional ideas and detail as you go.



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The Matrix

Not the movie, the spreadsheet kind! In this exercise, you're going to build a table with rows and columns. On the left column, in the rows, write down your top 3-5 segments. At the top of your columns, write down the journey stages that your customer is going to go through. It will look something like this:

	Awareness	Consideration	Evaluation	Purchase	Retention
Segment 1					
Segment 2					
Segment 3					

You now have a bunch of blank cells that you can fill in with personalization ideas and research questions. If you're an online consumer brand that sells home goods like rugs and throw pillows, what content should you show new homeowners who are at the evaluation stage? What should you show college students who may only be in the awareness stage? Write down your thoughts and capture those as before.

Now, you could do this exercise a lot of different ways, and that's the point! You could try products of interest on the rows and segments in the columns, or geographic regions in the rows and traffic source in the columns. The point is that you want something that reflects a relevant and useful division between your types of customers. Ideally that division is based on the data you already have before starting this exercise, but feel free to try this several times with several different dimensions.

If you want to get crazy, you could even try doing this exercise in a 3 dimensional spreadsheet.

The Customer Journey Map

If you need a more advanced framework, a customer journey map might do the trick. If you're not familiar with the concept, a customer journey map is a research guided tool that helps you capture gobs of information on different types of customers, including journey stages, activities, motivations, questions, barriers and much more. It is well beyond the scope of this article to talk about all the details, so here are a couple examples:

– *Using Customer Journey Maps to Improve Customer Experience* — Harvard Business Review

– *All You Need To Know About Customer Journey Mapping* — CMO Digital Forum

Once you have a set of customer journey maps in place, the tie-in to personalization becomes fairly obvious: How are you going to help these customers along their journey? Chances are, there are a number of stages where directing them to the right content for their journey stage is going to be incredibly helpful for them. Now all you need to do is capture tasks and stories that help to make that journey simpler and more engaging to your customer.

Once all of these ideas are captured and catalogued, they go into the backlog and go through your prioritization process. You can start with a single method and go to the next one a few weeks later, or you can continue to revisit these techniques every few weeks or months to generate new ideas each time.

These are not the only places your ideas will come from of course. It is a great idea to have a clear feedback mechanism within your organization so that anyone else can provide their ideas as they come up. You should also capture ideas as you go through your day to day work, as you look at data and review the results of past personalizations, and any other time when the idea strikes you. Keep in mind, capturing an idea doesn't mean you'll always do it. The point is to get a lot of ideas down when you're feeling creative so that you can use them and iterate quickly, and learn what works and what doesn't.

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Research Methods for Agile Personalization

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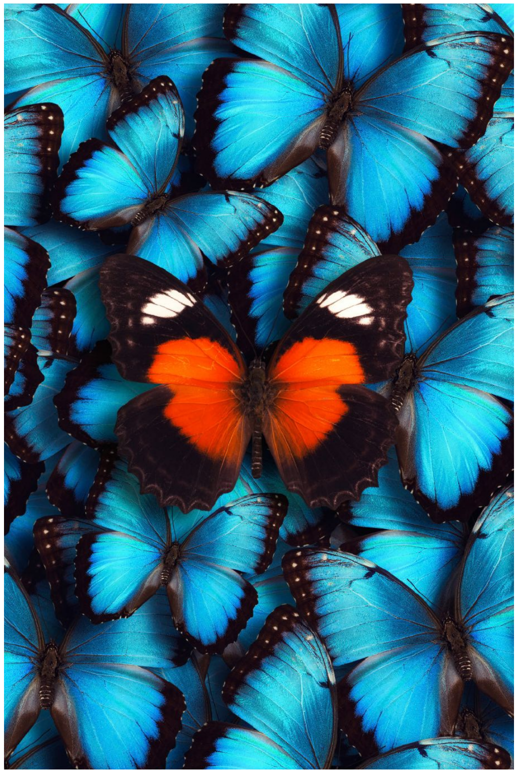
There are a few different frameworks that can be used to both generate and organize personalization and optimization ideas to help you stay on target. You can choose to use one or more of these, or find another that works best for you, but having a framework can make it far easier to keep the ideas flowing and organized.



Research Types

There are many ways to divide the types of research available. One of them is to think about quantitative vs. qualitative research:

Quantitative research: Looking at things that are clearly measurable and can be tracked over time. Both analytics and experimentation fall into this category.

Qualitative research: Focusing on things that are harder to measure, but may provide even greater value. As an example, asking a customer to rate a product with 1-5 stars is quantitative, whereas asking open ended questions about why a customer likes or dislikes a particular product is much harder to quantify, but can yield the researcher far greater insight.

Not all forms of research fall cleanly into qualitative or quantitative, but having a good idea of whether the research you're doing leans towards qualitative or quantitative can help when forming hypotheses and working towards generalizable knowledge.

1 Technically, free form text can be quantified using techniques from Natural Language Processing (NLP) such as sentiment analysis. Even then, a researcher is likely to discover deeper insights than the raw numbers that can be gathered by using these techniques.

Analytics

The most common form of research into user behavior on the web is most likely web analytics, using tools such as Google Analytics, Kissmetrics or Adobe Analytics. These tools allow for the ability to drill down into these dashboards to understand subsets or segments of the overall audience and how one acts differently from another. They provide an excellent starting place for generating ideas about how to personalize based on actual customer data, especially as you use the more advanced segmentation features and notice patterns of behavior around different segments.

Analytics can also be thought of in several different categories, the simplest of which is called descriptive analytics. In descriptive analysis, you are simply looking at the past and seeing what happened. It can be especially tempting to use the trends you observe in these graphs to predict what will happen in the future, but this temptation should be avoided as much as possible, as there are better ways to accomplish this.

Other forms of analytics include predictive, which can be used "to make predictions about future or otherwise unknown events" and prescriptive, which "goes beyond predicting future outcomes by also suggesting actions to benefit from the predictions and showing the implications of each decision option". These more advanced forms of analytics require more sophistication and often different tools and techniques.

With personalization, you are trying to understand how different offers or experiences will lead people to different outcomes. For this reason, it's very important to involve your data science or business intelligence teams in personalization efforts wherever possible, or plan to build those functions if they don't yet exist in your organization.

While having a general framework for coming up with new personalization ideas can be extremely helpful, it will never replace rolling up your sleeves and doing the research and data analysis.

Experimentation

Running controlled experiments is the gold standard of research in the scientific world. A/B testing and multivariate testing—as experimentation is referred to in many marketing circles—doesn't always receive the same level of rigour. But if you have an A/B testing tool, you possess the best tool available for determining cause and effect, which is exactly what you're trying to do with personalization.

Not every A/B test is created equal. For meaningful results you'll need to consider the design of the experiment and factors such as sample size and seasonality. You'll also need to consider how your audience and your hypothesis fit together.

For example, if you are running an experiment with your entire audience, standard A/B test reports will only show you how an experience affects behavior on average across the entire population. By either running the experiment on a subset of the population (using personalization) or by drilling deeper into the reporting, you can discover the nuances of your audience and drive to better personalization.

User Experience Testing

User experience (UX) testing can span both qualitative and quantitative research. It generally involves a trained researcher and a relatively small number of participants who are asked to use a product or service while the researcher asks questions that are carefully formulated to not introduce bias. There may be other observers, but they are often only watching by video or through a 2-way mirror to also avoid bias. A common result of user experience testing, even with a very small group of participants, is that common patterns are identified, such as language or user interface patterns that don't make sense to many people. These are often overlooked by the designers and implementers because they are so familiar with the interface.

The output of a user experience test is frequently a written report that will provide a large number of ideas for further experimentation and personalization. Keep in mind that just because several people identify a problem or make a suggestion, doesn't mean that your entire audience will feel the same way. That's why it continues to be critical to experiment with these new ideas and to refine and optimize the experience gradually.

Surveys

While user experience testing requires a lot of time and can be quite expensive, surveys are a great way to get quick feedback from a large number of people. A survey can be carried out by a 3rd party organization, sent to your email list using Google Forms, Survey Monkey or similar, or they can be placed directly within your experience using a tool like Qualaroo.

Bear in mind that the design of surveys can also lead to a variety of biases such as response bias and many others. As with experimentation, thinking about the design of your surveys will help you to make the best use of your time and to reach valid conclusions. Running a controlled experiment based on the ideas that come from survey respondents will help even more to validate your findings.

Ethnography

If surveys are a faster and simpler approach to research than user experience testing, then ethnographic research is at the other end of the spectrum entirely. Rather than having someone come to your office or use software to observe them perform specific tasks for 30-60 minutes, ethnographic research involves a researcher traveling to where your customers live or work and observing them in their day to day routines. Rather than answering questions about how a specific page or user experience are working in certain scenarios, you're observing who people really are and what they do with their time. This level of exploration can lead to insights about things that you would never think to ask about.

For example, Intel has used ethnographic research extensively to discover market trends and identify new business opportunities. When building digital experiences, this level of research can help to determine how your customers differ from one another and suggest further avenues of research — using analytics, experimentation and more — in which to invest time and resources.

Keeping Research Agile

Stick to short iterations and manageable tasks. Any single category of research above could easily be taken on as a one year project by a large team. This will undoubtedly produce richer results, but it's important that we keep tasks small and manageable. As such, if you're going to embark on user experience testing, as an example, try to break this down into small chunks that can be accomplished in short periods of time. For example, start with some quick hallway usability testing or go online with something like usertesting.com.

With personalization, you are trying to understand how different offers or experiences will lead people to different outcomes. It's very important to involve your data science or business intelligence teams in personalization efforts wherever possible.

In the first pass, you should be looking for early insights and “low hanging fruit”, not fully generalizable knowledge. Build on that knowledge with another round of more formal usability testing, or use the first insights to run a series of A/B tests which then roll back into more usability testing. The point is to keep these tasks small enough that you are making rapid changes to your experiences, testing out new personalizations, and continuously gathering feedback as you go.

Whatever system you decide on to manage your personalization backlog you should track research work along with the technical work. This shared list of work helps the personalization owner to prioritize which research work should be done when, and also allows a corpus of knowledge to be built up in a single place that shows others what was discovered, what was tried as a result, what was learned, and finally what was implemented. Many project management tools even allow these links to be made explicitly, so that you can go back and see the life span of any idea that was generated through to completion.

Tracking within this system also ensures that you really are keeping research to manageable chunks, and keeps the researcher closely involved with the rest of the team, helping them to know what questions should be asked and provide further suggestions to the implementation team.

Research is a critical piece of your personalization program. Whichever methods you use and how you build it into your team, keep in mind that it should be agile along with the rest of your program. Researchers and analysts should be working closely with designers and implementers, ensuring that you keep your velocity up and make the best use of all of the learnings that are gathered through every iteration.

Conclusion

Personalization can be a daunting and challenging undertaking. Many organizations fail to realize that before getting started and then are disappointed when they don't see results as quickly as they would like. Having the right people in the right places in the organization and focussing on small, measurable iterations of tasks makes it possible to build momentum and eventually arrive at the main goal, where your guests feel welcome, known and appreciated.

If you've thought through and decided on the people and processes that will start your organization's personalization strategy, then it's time to get to work. Pick somewhere to get started, and give it all you've got, then measure, prioritize and iterate again. It will take time and it will take effort, but the rewards of building meaningful and engaging experiences for everyone will make it all worthwhile.

Research is a critical piece of your personalization program. Whichever methods you use and how you build it into your team, keep in mind that it should be agile along with the rest of your program.

LET'S TALK