

Personalisation Opportunity Canvas



Personalisation is a unique experience for an individual or a group of people – it's something for someone, not everything for all.

TYPES OF PERSONALISATION

Personalisation can mean different things at different stages of the customer journey. Take a look at this matrix to help decode the complexity.

Why personalise

Research has shown that people are more likely to do business with a company if it offers personalised experiences. Additionally, consumers who believe that personalised experiences are very appealing are ten times more likely to be a brand's most valuable customer. Simply put, personalisation means being more relevant to your customers — which can have a significant impact on your bottom line.

How to get started

Most companies already have a myriad of opportunities and the capabilities that make personalisation possible. This canvas is a great way to get a head start in making them a reality!

Scaling up / building competence

Just like with any other thing, also personalisation has different maturity levels. It often starts with simple segmentation based on one factor, and grows into offering hyper-personalised experiences based on all available customer data. The key is to keep moving forward in the personalisation ladder.

	MARKETING	DIGITAL COMMERCE	CUSTOMER SUPPORT
Rule based	Sending different newsletters to different segments based on their gender and age.	Providing a birthday discount or gift to customers on their birthday.	Highlighting support content related to purchase history.
Contextual	Altering landing page messaging based on traffic source.	Automatically generating product bundles in case the user shows interest in various products or categories in a session.	Triggering live chat in case the user behavior indicates signs of frustration.
Predictive	Personalised email sequences based on the buying habits of users with similar preferences.	Alternating check-out into more simplified or information boosted form based on the likeliness of users preferences.	Offering a higher support level in case a customer shows signs of having more valuable CLV.

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TOP 3 CUSTOMER NEEDS	WHAT DATA IS NEEDED? WHERE IS THAT DATA LOCATED?	WHAT ARE THE CHANNELS WHERE THE PERSONALISATION TAKES PLACE?	WHAT TOOLS ARE NEEDED?	WHAT IS THE TARGET?
<ul style="list-style-type: none">• Can you help me find what I like?• Can you show me deals I actually want?• Can you surprise me in a good way?• Can you remember my preferences?• Can you make me feel special?				

HOW TO FILL THE CANVAS

1 Start by ideating

Use the helping questions to get started. If your creative juices are not flowing, start from the other end: "What is the target?" And work your way in the opposite direction.

2 Choose the top 3 customer needs

3 Identify the data needed

4 Identify the channels needed

5 Identify the tools needed

6 Identify the targets

Purchase history	Relationship length	Website	Customer portal	CRM	CDP	Improve CX	Increase basket size
Age	Frequency of buying	Age	Email	CMS	Chatbot	Cross-sell	Increase basket value
Location	Online activity	Webstore	Chat	Email marketing tools	Personalisation platform	Up-sell	Reducing abandonment
Device	Time of the day		Phone	Marketing automation	Recommendation engine	Increase retention	Faster Issue resolution in customer service
Gender	Season			A/B testing tool	Social media listening tool	Grow conversion rate	Reducing internal work time