



| The Marketer's Playbook

Path to Personalized Digital Experiences

PERSONALIZATION STRATEGY | EXPERIENCE ORCHESTRATION GUIDE



Customer Expectations Have Changed... Has Your Personalization Strategy?

If you're investing in web personalization today, here's the question that matters:

Can your personalization strategy respond to customer needs in real time, across interactions and channels? If not, your personalization efforts may still rely on outdated one-size-fits-all experiences that fall short of modern consumer expectations.

According to McKinsey, 71% of consumers expect companies to deliver personalized interactions, and 76% get frustrated when this doesn't happen.¹

Today, leveraging personalization as a differentiator requires orchestrating entire experiences and connecting data, content, and interactions in real time, responding to what users need in the moment.

Complicating expectations further is the fact that today's consumers aren't evaluating your digital experience in isolation. Instead, they compare it, whether consciously or not, to their last best digital experience. Often, that benchmark isn't your direct competitor. It's brands like Amazon, Netflix, and Spotify that are fundamentally reshaping expectations through AI-driven personalization, highly relevant content and product recommendations, as well as seamless cross-channel experiences delivered in real time.

71% OF CONSUMERS WANT PERSONALIZED OFFERS AND PROACTIVE ASSISTANCE, BUT ONLY 34% OF BRANDS PROVIDE IT³



Consumers now expect every brand to deliver the same level of convenience and relevance. This is where many organizations fall short and how friction builds. Disconnected experiences make it harder for users to find relevant content and easier for them to leave your site.

WHEN CUSTOMERS FEEL THEIR EXPERIENCE IS PERSONALIZED THEY'RE...

1.8X MORE LIKELY TO PAY A PREMIUM

3.7X MORE LIKELY TO PURCHASE MORE THAN INTENDED²



1. McKinsey & Company. What Is Personalization?

2. Gartner. Marketing Leaders Can Unlock Commercial Value by Redefining Personalized Digital Interactions with Customer-Shared Data.

3. Adobe. Personalization at Scale Has Never Been More Crucial for Your Business.

Building a Modern Personalization Program

Closing the gap begins with a change in your approach, from **isolated personalization tactics** to **orchestrating connected**, real-time experiences across the user journey.

Experience orchestration is the difference between users piecing things together independently versus being guided forward toward meaningful next steps.

As a result, you'll see a shift in performance metrics in the form of increased user engagement, higher conversion rates, and stronger customer loyalty and lifetime value.

To understand what this transformation looks like in practice, it helps to compare the two:

ISOLATED PERSONALIZATION TACTICS	EXPERIENCE ORCHESTRATION
Static personas that don't reflect real-time behavior	Responding to live user signals, not predefined segments
Unstructured content that limits flexibility	Composable content models for reusable, adaptive experiences
Generic experiences that ignore user intent	Consistent, context-aware experiences
Disconnected data across systems	Connected data across systems and channels
Limited experimentation and optimization	Continuous optimization through testing and learning
Technology dictating strategy instead of enabling it	Business and customer experience goals guiding technology decisions



Stephanie Saia

PERSONALIZATION &
EXPERIMENTATION
PRACTICE LEAD
VERNDALE

“Personalization is a core driver of digital performance, but many programs still rely on approaches that weren’t designed for how customers behave and move fluidly across channels and devices.”



4 Pillars of Modern & Connected Personalization

Orchestrating experiences across channels requires building a connected system that continues to evolve over time. That system is built across four core pillars.



PILLAR 1

Define Strategy & Governance

Align business goals, ownership, and operating model

PILLAR 2

Build Data, Taxonomy & Identity Foundations

Structure content, connect systems, and enable signal-driven insights

PILLAR 3

Orchestrate Experiences Across Journeys

Deliver relevant, context-aware experiences in real time

PILLAR 4

Test, Learn, and Optimize Continuously

Use experimentation to scale what works and refine what doesn't



Together, these pillars create a system that continuously improves, something most personalization programs lack.



Define Strategy & Governance

Personalization works best when there's clear ownership, structured processes, and a focus on proving value early. That begins with a strategic approach that aligns personalization efforts with business goals while creating a path to scale over time.

Start by Proving Value

To prove value early, define success before launch. Each pilot should include a clear business goal, primary KPI, baseline or control, and decision rule for whether the experience should be scaled, refined, or paused.

Start with a focused set of use cases or pilot experiences that are low risk and tied to measurable business outcomes. Early wins build organizational confidence, demonstrate ROI, and create momentum for broader personalization efforts.

Establish Ownership, Governance & Trust

As personalization programs mature, structure becomes increasingly important. Establish clear ownership for strategy and performance while bringing together cross-functional teams across marketing, product, analytics, technology, and content.

Equally important is a consistent approach to prioritization. The most effective teams maintain a structured backlog of personalization opportunities and evaluate them based on business impact, effort, and organizational readiness.

Trust should also be built into the program from the start. Leverage data to support user intent and create experiences that feel helpful and relevant, while establishing clear guidelines for how customer data is used.

Create Operational Structure to Move Faster & Scale

To scale personalization effectively, teams need repeatable processes for launching, measuring, and optimizing experiences. Establish shared workflows, testing practices, and performance metrics that support continuous learning and improvement.

This operational structure creates the clarity needed to move quickly, scale efficiently, and evolve personalization from tactical execution into a coordinated experience strategy.

To create lasting impact, personalization should be embedded into campaign planning, content operations, and optimization efforts, continuously evolving based on performance insights and changing customer behavior.



Data, Taxonomy & Identity

Personalization is only as effective as the foundation it's built upon. When data is fragmented, content is unstructured, and customer identity is unclear, personalization remains manual and limited in impact.

Addressing these gaps is what turns fragmented efforts into experiences that can drive improved performance.

Move from Segments to Signals

Modern personalization is driven by data signals, dynamic inputs that reflect what a customer is doing and what they need in the moment. These signals include:



Behavioral: what the user does (pages viewed, content engaged with, actions taken)



Contextual: what's true about the current session (device, location, referral source), as well as patterns from previous interactions



Demographic: who the user is (industry, role, job title)



Explicit: what the user directly shares (preferences, selections, form inputs)

Individually, these signals provide insight. Combined, they create a more complete and actionable understanding of user intent.

This shift from segment to signals moves personalization from static, predefined audiences to adaptive user profiles, and from one-size-fits-all experiences to context-aware interactions.

The goal is to achieve real-time user understanding, where experiences continuously adapt based on user behavior, context, and intent.



Data, Taxonomy & Identity

Structure Content to Enable Scale

Even with strong data and signals, personalization breaks down without structured content.

Website taxonomy refers to the way a site's content is categorized, tagged, and organized to make navigation intuitive and content easy to find. **Having a clear taxonomy is one of the most critical components of personalization, yet it's often overlooked.**

A well-defined taxonomy enables:

- Dynamic content delivery and recommendations
- More precise audience segmentation and journey alignment
- Improved search relevance and discoverability
- Scalable personalization across channels

Taxonomy helps content become modular and personalization scalable. However, it's not as simple as just building a strong taxonomy. The long-term value comes from maintaining that taxonomy as a living system that continues to deliver accurate recommendations, support content reuse, and adapt as customer behavior evolves.

When developing taxonomy, organizations should define ownership, maintenance processes, and governance standards to ensure it continues to support personalization and AI initiatives over time.

Connect Customer Identity to Make it Actionable

With structured content in place, the next step is connecting it to the customer.

Most organizations have customer data across multiple systems—CMS, CRM, analytics, and marketing platforms—each capturing part of the picture. The challenge isn't collecting all that data; it's consolidating it to provide a unified view of the customer. Otherwise, interactions remain fragmented across channels and sessions, limiting the ability to deliver truly relevant, context-aware experiences.

Moving from sessions to a unified view requires:

- Recognizing users across sessions and devices
- Connecting behavioral, contextual, and known data
- Building a progressively richer understanding over time

As capabilities mature, this evolves from anonymous interactions to unified customer profiles, often supported by customer data platforms (CDPs) or integrated data layers.



Experience Orchestration

Identity is more than simply knowing who the customer is. It's about being able to use that understanding in meaningful ways. Connected identity enables organizations to apply data signals in real time, make smarter experience decisions across channels, and deliver interactions that reflect each user's context and behavior. Without it, even strong data and well-structured taxonomy can only go so far.

This is where personalization begins to evolve from isolated tactics into connected experiences. While campaign-triggered interactions and in-session personalization can improve individual moments, they often fall short when channels operate independently. **Experience orchestration connects those moments into a more cohesive journey that adapts as users move across channels, devices, and touchpoints.**

The Benefit of Orchestration

Imagine your customer journey carrying context forward and responding dynamically as customer behavior and needs evolve.

When done effectively, orchestration avoids friction. Instead of forcing users to start over at every touchpoint, it delivers more relevant next steps in real time and creates experiences that feel consistent and responsive from one interaction to the next.

This level of coordination also creates a stronger foundation for continuous optimization. Every interaction provides insight into what customers engage with, where friction exists, and how experiences can improve over time, building digital experiences that adapt to meet evolving customer expectations.

Experience Orchestration in Practice by Industry

Hospitality / Travel: A traveler who searches for family-friendly resorts on mobile later receives destination recommendations, tailored offers, and relevant travel content across email and web, based on those earlier interactions.

Financial Services: A customer researching mortgage rates online later receives educational content, payment calculators, and next-step guidance aligned to where they left off in the decision-making process.

Healthcare / Hospitals: A patient exploring orthopedic services and provider profiles is later guided toward related specialists, appointment scheduling, and recovery resources tailored to their interests and care needs.

Higher Education: A prospective student exploring nursing programs can later receive personalized campus visit invitations, application reminders, and content aligned to their academic interests.

Retail: A shopper browsing outdoor gear online can later encounter curated product recommendations, local inventory availability, and related educational content based on previous browsing behavior and purchase history.

B2B Manufacturing: A buyer researching a specific product category can return to find tailored case studies, technical documentation, and recommended solutions relevant to their industry and stage in the buying journey.

These connected experiences make customers feel seen and heard, while giving brands the insights they need to deliver more relevant, personalized interactions over time.



Experimentation & Optimization

As personalization matures, experimentation transforms it into a learning system. This progression goes beyond one-off A/B tests into more strategic capabilities.

Experimentation should be tied to a measurement framework that separates engagement signals from business outcomes. A test is only useful if teams can understand what changed, who responded, how performance shifted, and what action should come next.

Over time, experimentation becomes integrated into how digital experiences are designed and delivered, creating a data-driven operating model embedded across content, campaigns, and journeys.

Each test contributes to a growing body of insight, enabling teams to refine strategies, scale what works, and adapt quickly to changing user behavior.

As a result, you'll create better-performing experiences, as well as a more agile organization that learns, improves, and drives measurable impact over time.

Strategic Capabilities:



Multivariate and behavioral testing: evaluating multiple variables and tailoring experiences based on user actions and segments



Always-on optimization: running continuous tests across key journeys rather than starting and stopping campaigns



AI-supported decisioning: using machine learning to accelerate testing, identify patterns, and optimize experiences at scale





Measure What Matters

Use a simple framework to prove impact before scaling personalization.

Personalization only scales when teams can prove what's working, why it's working, and where to invest next.

Before launching a personalized experience, define the measurement plan upfront. Each use case should connect a clear business goal to a specific customer behavior, measurable outcome, and decision rule for what happens next.

Build the plan before launch:

- Business goal & priority journey
- Audience or trigger
- Hypothesis and personalized treatment
- Baseline or control
- Primary KPI, guardrails, and decision rule

CONNECT LIFT TO VALUE

Eligible audience × KPI lift × outcome value = estimated impact

Prove incremental impact:



When volume allows, use A/B tests, control groups, or holdouts to compare the personalized experience against what would have happened otherwise.



When it does not, label results as directional and use cohort or pre/post analysis carefully.

Avoid treating correlation as proof of lift.

DECISION RULE

Scale, refine, pause, or stop based on KPI lift and guardrail performance.



The goal isn't to measure everything. It's to know what changed, for whom, by how much, and whether to scale, refine, or stop.

Measure Across 4 Levels

1 Business outcome

- Revenue
- Pipeline
- Bookings
- Renewals
- Retention

2 Journey progress

- Form completions
- Application starts
- Quote requests
- Appointments

3 Experience signals

- CTA clicks
- Recommendation engagement
- Search refinements
- Return visits

4 Guardrails

- Bounce
- Opt-outs
- Abandonment
- Page speed
- Support inquiries
- Margin impact

How to Get Started

Start small and with intention. Focus on high-impact use cases that align with business goals, customer needs, and the data and content you already have available.

1



Identify priority journeys and use cases

2



Define required data, signals, and content

3



Implement foundational taxonomy and tagging

4



Launch initial experiences (crawl stage)

5



Measure performance against primary KPIs and guardrails, then iterating through experimentation

6



Expand into more advanced, real-time capabilities

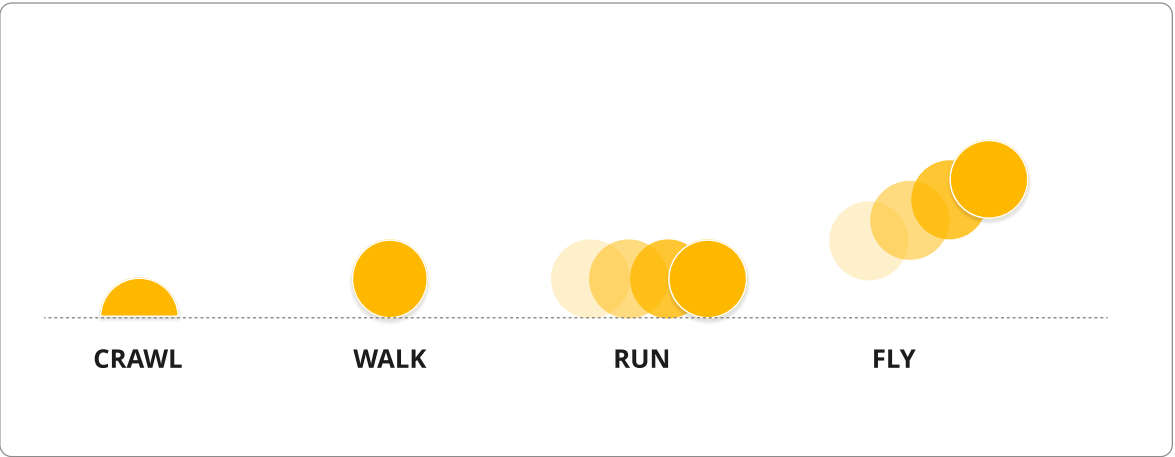


Each step builds on the last, creating a practical path from foundational personalization efforts to more sophisticated real-time orchestrations and AI-enabled decisioning.

The Path to Personalization Maturity Diagnostic

Personalization maturity is not defined by technology alone. Use this diagnostic to identify where capabilities are strong, where gaps limit scale, and what must improve before AI-driven personalization can create value.

Personalization evolves across capabilities, not in one single leap.



ASSESS MATURITY ACROSS SIX CAPABILITIES

CAPABILITY	CRAWL	WALK	RUN	FLY
Strategy & Governance	Ad hoc tactics	Prioritized use cases	Governed roadmap	Embedded operating model
Data & Identity	Static segments	Defined signals	Connected profiles	Predictive intelligence
Content & Taxonomy	Manual variants	Tagged content	Modular content	AI-assisted scale
Journey Orchestration	Isolated placements	Journey-based targeting	Cross-channel orchestration	Next-best action
Experimentation & Measurement	Engagement reporting	KPI-based testing	Continuous optimization	Automated learning loops
Technology & AI Readiness	Disconnected tools	Pilot-ready platforms	Integrated ecosystem	Governed AI enablement

How to Score This Diagnostic

Score what’s consistently operational today, not what’s planned. Use whole or half-point increments only. Average the six capability scores and map the raw average to a stage.

SCORING RULE

- Do not choose **1.2 or 1.4**.
- Pick the closest **0.5-point score**. If mixed, score down.

GATES

Cap at Walk if data, content, or measurement is Crawl.

Fly requires data, content, governance, and measurement at 3.0+.

Example:

1.5 + 1 + 1 + 1.5 + 1 + 1.5

=

7.5 / 6 = 1.25

Crawl

INDIVIDUAL CAPABILITY SCORE

SCORE	READ AS	USE WHEN...
1.0	Clear Crawl	Ad hoc, manual, isolated, or inconsistent
1.5	Crawl+	Foundations exist, but are limited or not repeatable
2.0	Clear Walk	Defined and repeatable for priority use cases
2.5	Walk+	Expanding across journeys, but not fully connected
3.0	Clear Run	Integrated, measured, and actively optimized
3.5	Run+	Advanced or real-time capabilities exist, but are not fully scaled
4.0	Clear Fly	Predictive, AI-assisted, governed, and optimized at scale

AVERAGE SIX SCORES; MAP RAW AVERAGE TO STAGE

1.00–1.49	1.50–2.49	2.50–3.49	3.50–4.0
CRAWL	WALK	RUN	RUN

Use the raw average to two decimals. Do not round before mapping.



The Role of AI in Personalization

AI becomes valuable when it's activated through the platforms and operating model behind the experience.

Platforms like Sitecore and Optimizely are increasingly AI-ready, but the advantage comes from configuring those capabilities around your journeys, taxonomy, identity, measurement, and governance.



When the foundation is ready, AI can help teams:

1 Read intent signals

Surface audience behaviors, engagement patterns, and journey friction

3 Scale content variation

Generate, adapt, and govern modular content for priority audiences

2 Activate next-best actions

Match users to relevant content, offers, journeys, or handoffs

4 Optimize through experiments

Use test results and performance data to refine experiences over time

Verndale Activation Lens

Use the maturity diagnostic to decide which AI use cases are ready to activate inside Sitecore, Optimizely, or the broader DXP stack.

AI-Ready Platforms Need an Activation Plan

Platform capability is the starting point. Impact depends on how AI is connected to real use cases, content operations, data flows, and decision rules.

SITECORE

Stream + Personalize

Brand-aware AI, agents, and personalization tools can support governed content, campaigns, search, and experience decisioning.

OPTIMIZELY

Opal + Optimizely One

AI agents can connect content creation, CMS workflows, experimentation, personalization, and data-driven insights.

VERNDALE

Platform expertise

We help translate platform AI into live personalization flows, CMS rebuild requirements, governance, and measurable test plans.

Technology Ecosystems

Core Components

Driving meaningful personalization needs the right foundation. That foundation typically includes:

- A content management system (CMS) or digital experience platform (DXP) to manage and deliver content
- Experimentation and optimization tools to test, learn, and improve
- Data and identity platforms (e.g. CDP, analytics) to create a complete view of each customer
- Integration layers that connect systems and data in real time

When these technologies work together, organizations can move beyond one-size-fits-all experiences and create personalized interactions that feel timely and relevant, leading to better business outcomes.

PLATFORMS

Technology is a critical enabler of personalization, but results come from how strategy, data, content, and technology work together.

When evaluating platforms, organizations should look beyond immediate needs and choose solutions that can support evolving personalization and AI initiatives over time. As personalization and AI capabilities evolve, flexible technology provides the foundation needed to adapt quickly and create more meaningful customer interactions.



How Verndale Helps

At Verndale, we help organizations move beyond isolated personalization tactics and build the capabilities needed to deliver connected, adaptive customer experiences at scale.

Our role is to help you align strategy, customer insights, content, data, experimentation, and technology into a personalization program that drives measurable business outcomes. Whether you're launching your first personalization initiative or advancing toward real-time and AI-driven experiences, we help you develop the capabilities, operating model, and roadmap needed to mature and scale over time.



Sign Up for a Free Two-Hour Personalization Readiness Assessment

Evaluate your current capabilities and identify the highest impact opportunities for advancing personalization across the customer journey.

THIS ASSESSMENT INCLUDES:

- A clear view of your organization's personalization readiness
- Prioritized opportunities to improve customer engagement and conversion
- Actionable recommendations aligned to your business goals
- A roadmap for advancing personalization maturity over time
- A measurement framework for proving personalization impact and prioritizing future investments



Assess Your Organization's Readiness and Start Delivering Relevance Where It Matters Most

Get Started Today