

ASSESSMENT OUTPUT

Sample Company

Large Real Estate Development · Marketing Team of 30 · \$4M Martech Stack

DATE
June 2026
FACILITATED BY
Verndale Marketing Services
SESSION LENGTH
2 hours

OVERALL READINESS	RECOMMENDATION	PILOT AREA	CONFIDENCE
16 / 20	Activate Now	Homebuying	High

RECOMMENDED PILOT USE CASE

Add **First-Time Buyer Guidance Personalization** to the **homepage and community landing page** , including guides and step-by-step content, to **reduce complexity and uncertainty in the homebuying process** .

FOUR-PILLAR READINESS SCORECARD

Audience Intelligence	Strong audience understanding; opportunities to further validate high-value segments and intent signals		4 / 5
Data Foundation	Foundational data assets available to support near-term personalization; opportunities to improve data unification and outcome measurement		3 / 5
Martech Ecosystem	Modern platform capabilities with a strong foundation for personalization, activation, and optimization		5 / 5
Experimentation Framework	Established testing practices; greater rigor, governance, and performance measurement needed		3 / 5

✓ DO NOW

Activate behavior-based personalization and experimentation using existing customer signals and platform capabilities

Focus on high-confidence use cases that leverage readily available behavioral data, such as location, referral source, content engagement, and previous site interactions. Establish a formal experimentation framework to validate assumptions, measure impact, and create a repeatable process for optimization.

→ PLAN NEXT

Expand audience activation through enhanced data connectivity, segmentation, and customer profile unification

As data and platform capabilities mature, invest in creating richer audience profiles that connect behavioral, transactional, and engagement data across systems. Use these insights to validate audience segments, improve targeting precision, and support more sophisticated personalization strategies.

✗ AVOID FOR NOW

Defer predictive and highly complex personalization initiatives until foundational data and measurement capabilities mature

Avoid introducing advanced AI-driven recommendations, predictive scoring models, or highly orchestrated 1:1 experiences before customer data is sufficiently connected and measurable. Prioritizing foundational capabilities first will reduce complexity, improve adoption, and increase the likelihood of long-term success.

ACTIVATION PATH

30 Days: Align & Prepare

- Define personalization objectives and success metrics aligned to business goals.
- Prioritize a small set of high-impact use cases supported by existing audience and behavioral data.
- Establish an experimentation framework, including testing processes, KPIs, and reporting requirements.
- Confirm platform, content, analytics, and stakeholder readiness for pilot activation.

90 Days: Launch, Learn & Optimize

- Deploy initial personalization pilots using behavioral, geographic, and contextual audience signals.
- Validate audience segments, journey assumptions, and engagement hypotheses through experimentation.
- Measure performance against agreed-upon business and customer experience KPIs.
- Refine the personalization roadmap based on pilot outcomes and identified opportunities for scale.

BIGGEST BLOCKER

Linking audience behaviors and personalization efforts to downstream conversion and revenue outcomes.

GOVERNANCE REQUIREMENT

Defining ownership for audience strategy, experimentation, and personalization decision-making across teams.

RECOMMENDED NEXT STEP

Validating high-value audience segments and use cases through structured testing and measurement.