

The Personalization Planning Worksheet

Most personalization fails for the same reason: it starts from a tool rather than a reason, and nobody decides how they will know whether it worked.

One sheet per personalization you are considering

If you cannot complete the measurement rows, that is a useful signal in itself.

1. The business problem

Not 'we want personalization'. Something like 'returning customers see a generic homepage'.

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2. The signal you already have

What can you observe today without new infrastructure?

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3. The rule, in plain English

If you cannot say it in one sentence, it is not ready to build.

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4. What the visitor actually sees

The concrete change. Sometimes the right change is showing less.

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5. How you will judge it

Pick the measure before launch.

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6. What would make you switch it off

Decide the kill condition now, not later.

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The control test

Run the personalized experience against the generic one. Plenty of personalization performs worse than the control, and you will never find out if you do not check.

Variant	Measure	Result
Control (generic)		

Personalized		
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Live rule register

Rules accumulate. A site carrying forty nobody remembers writing is slower, harder to change, and stranger to use than one with six good ones.

Rule	Owner	Last reviewed	Keep?

The explain-it-out-loud test. Would the person be comfortable if you told them the rule? "We showed you this because you looked at it earlier" is fine. Anything you would rather not say plainly is worth reconsidering.