

The Website Personalization Planning Worksheet

Pick a few high-value moments, use the signals you have, and stay on the right side of the creepy line. This is how.

Step 1. Pick the few moments worth personalizing

More personalization is not better; more relevant personalization is. Name the two or three moments where relevance clearly helps the visitor get what they came for.

Moment	What changes	Why it helps the visitor

If you get stuck here: not being able to name a specific moment where relevance clearly helps is a sign to make the single, generic experience better rather than personalizing at all. Personalization pays in proportion to how much variety your visitors actually have.

Step 2. Which signals do you actually have?

Signals are informed hints, not facts. Note how reliable each is, and design for being wrong.

Signal	Have it?	How reliable
Where they came from (referral, ad, search)		
What they are doing this session		
Who they are (returning / logged in)		
Context (device, rough location, time)		

Step 3. Run each rule through the creepy test

For every rule you are considering, ask: would I be comfortable explaining this to the visitor's face?

Explains cleanly out loud

'We show running gear to people who bought running gear' is fine to say aloud.

1

2

3

4

5

Uses on-site behaviour, not outside data

Acting on what they did here feels fair; acting on what they did elsewhere does not.

1

2

3

4

5

Subtle, not showy

Relevance should feel natural, not announced. Do not show your homework.

1	2	3	4	5
---	---	---	---	---

Avoids sensitive inferences

No health, finances, or personal circumstances, even if you could.

1	2	3	4	5
---	---	---	---	---

The rule of thumb: when in doubt, personalize less. A visitor who feels watched trusts you less, and trust is worth more than any single conversion. Restraint reads as respect.

Step 4. Prove it beats the generic version

How will you measure this personalization against the plain experience?

Always compare against generic, honestly. Sometimes it does not help, and a good test catches that cheaply.