

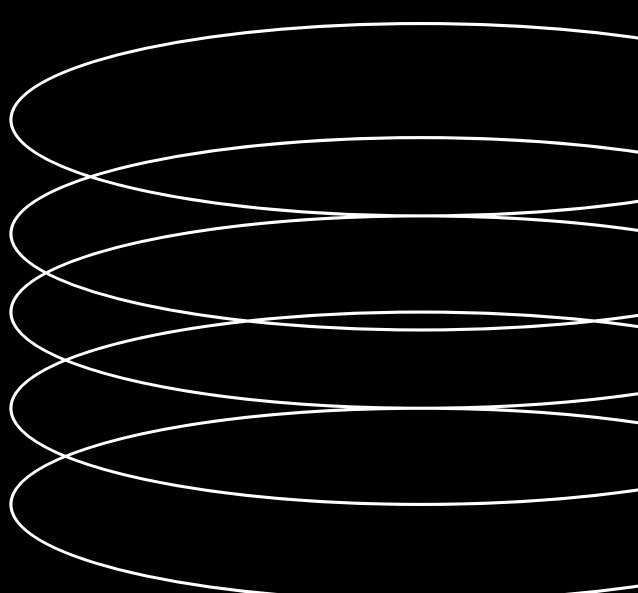


Discover Exactly Where Your Personalization
Efforts Stand

The B2B Personalization Maturity Assessment



WHAT'S INSIDE

- Current State Evaluation Across 12 Personalization Dimensions
 - Technology Gap Analysis and Recommendations
 - 90-Day Personalization Improvement Plan
 - ROI Projection Calculator for Personalization Investments
- 



The Author

MARISSA HOMERE

Marissa Homere is a seasoned B2B marketing strategist with over 15 years of experience driving growth and building messaging that resonates. Known for her deep expertise in product marketing and go-to-market execution, Marissa has spent the last few years quietly and effectively integrating AI into marketing strategies—not as a gimmick, but as a scalable, strategic lever for smarter, faster growth.

With a background working across high-growth startups and enterprise organizations, she brings a pragmatic, results-driven lens to marketing innovation. Marissa specializes in translating complex technologies into clear, actionable narratives that move markets—and now, she’s doing the same with AI.

This eBook distills her hands-on learnings into practical insights, helping marketers cut through the hype and use AI tools to work more efficiently, make better decisions, and build campaigns that actually convert.

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The Personalization Reality Check

MOST B2B "PERSONALIZATION" IS JUST MAIL MERGE

If you're like most B2B marketers, your "personalization" consists of:

- Adding first names to email subject lines
- Showing different website content to different industries
- Sending role-specific email sequences

This isn't personalization. It's basic segmentation with delusions of grandeur.

Real B2B personalization means creating experiences that feel custom-built for each prospect's specific situation, challenges, and buying process. It means understanding that you're not just personalizing for individuals—you're personalizing for buying groups of 6-22 people.

Why This Assessment Matters:

- 80% of B2B buyers prefer personalized experiences, but most never get them
- Companies doing personalization right see 20% revenue increases
- 86% of B2B marketers acknowledge personalization is crucial, but most don't know how to scale it

This assessment will show you exactly where you stand and give you a clear roadmap for improvement.



Personalization Maturity Evaluation

Rate each statement from 1 (never/doesn't exist) to 5 (always/fully implemented)

Dimension 1: Data Foundation

- ☐ We collect behavioral data beyond basic demographics
- ☐ Our data is clean, integrated, and accessible across platforms
- ☐ We track individual and account-level engagement patterns
- ☐ We have systems to enrich incomplete prospect data
- ☐ Our data collection complies with privacy regulations

Score: __/25

Dimension 2: Segmentation Strategy

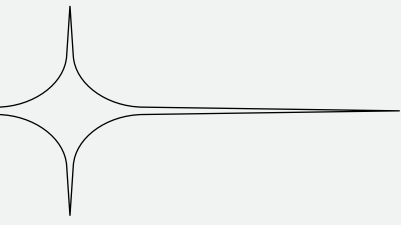
- ☐ We segment based on behavior, not just demographics
- ☐ Our segments are actionable and lead to different treatments
- ☐ We have account-level segmentation for B2B buying groups
- ☐ We regularly test and refine our segmentation approach
- ☐ We can create dynamic segments based on real-time behavior

Score: __/25

Dimension 3: Content Personalization

- ☐ We create content variations for different personas and stages
- ☐ Our website content changes based on visitor profile
- ☐ We personalize email content beyond first name insertion
- ☐ We have personalized content for different buying group roles
- ☐ We create custom content for high-value accounts

Score: __/25



Dimension 4: Technology Integration

- ☐ Our personalization tools integrate with our CRM and marketing automation
- ☐ We can deliver personalized experiences across all channels
- ☐ Our technology stack supports real-time personalization
- ☐ We have tools to test and optimize personalized experiences
- ☐ Our personalization technology is scalable and reliable

Score: __/25

Dimension 5: Journey Orchestration

- ☐ We map personalized journeys for different prospect types
- ☐ Our personalization adapts based on engagement and behavior
- ☐ We coordinate personalized touchpoints across sales and marketing
- ☐ We have triggers that initiate personalized campaigns
- ☐ We measure the effectiveness of our personalized journeys

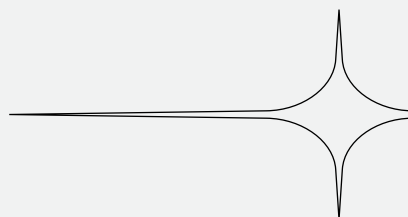
Score: __/25

Dimension 6: Account-Based Personalization

- ☐ We personalize experiences for entire buying groups
- ☐ We create account-specific content and campaigns
- ☐ We coordinate personalization across multiple stakeholders
- ☐ We have account-level personalization playbooks
- ☐ We measure personalization impact at the account level

Score: __/25

Total Score: __/150



Maturity Level Assessment

YOUR PERSONALIZATION MATURITY LEVEL

Level 1: Basic (0-50 points)

Status: You're doing segmentation, not personalization

Characteristics:

- Mail merge personalization (first names, company names)
- Basic demographic or firmographic segmentation
- Same content for everyone in each segment
- Limited data collection and integration

Priority: Build data foundation and basic behavioral tracking

Level 2: Developing (51-90 points)

Status: You're personalizing content but not experiences

Characteristics:

- Some behavioral segmentation
- Content varies by role or industry
- Basic website personalization
- Email personalization beyond names

Priority: Implement journey-based personalization and better technology integration

Level 3: Advanced (91-120 points)

Status: You're delivering personalized experiences at scale

Characteristics:

- Sophisticated behavioral and intent-based segmentation
- Dynamic content across multiple channels
- Account-level personalization programs
- Integrated personalization technology stack

Priority: Optimize for buying groups and complex B2B sales processes

Level 4: Mastery (121-150 points)

Status: You're a personalization leader

Characteristics:

- Predictive personalization based on AI and machine learning
- Seamless personalization across entire customer lifecycle
- Account-based personalization for complex buying groups
- Continuous optimization and testing

Priority: Innovation and teaching others your methods



Technology Gap Assessment

Personalization Technology Stack Audit

Data Management

Current tools:

- ☐ Customer Data Platform (CDP)
- ☐ Data Management Platform (DMP)
- ☐ CRM with behavioral tracking
- ☐ Data enrichment services
- ☐ Privacy compliance tools

Gap Score: ___/5

Content Personalization

Current tools:

- ☐ Dynamic content management system
- ☐ Email personalization platform
- ☐ Website personalization tools
- ☐ Video personalization capabilities
- ☐ Social media personalization

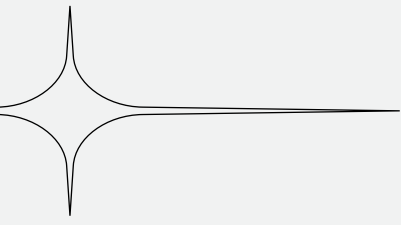
Gap Score: ___/5

Journey Orchestration

Current Tools:

- ☐ Marketing automation with personalization
- ☐ Cross-channel orchestration platform
- ☐ Behavioral trigger systems
- ☐ A/B testing for personalized content
- ☐ Journey analytics and optimization

Gap Score: ___/5



Personalization Technology Stack Audit

Account-Based Tools

Current tools:

- ☐ Account-based marketing platform
- ☐ Intent data providers
- ☐ Account intelligence tools
- ☐ Sales and marketing alignment platform
- ☐ Account-level analytics

Gap Score: __/5

AI and Machine Learning

Current tools:

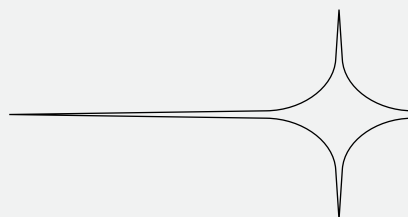
- ☐ Predictive analytics platform
- ☐ Recommendation engines
- ☐ Natural language processing tools
- ☐ Machine learning personalization
- ☐ AI-powered content generation

Gap Score: __/5

Total Technology Gap Score: __/25

Gap Analysis:

- **20-25:** You have a comprehensive personalization technology stack
- **15-19:** You have most tools but are missing key capabilities
- **10-14:** You have basic tools but need significant upgrades
- **5-9:** You're missing critical personalization technologies
- **0-4:** You need to completely rebuild your technology approach



90-Day Personalization Improvement Plan

PHASE 1: FOUNDATION (DAYS 1-30)

Week 1: Data Audit and Strategy

- Complete comprehensive data audit across all systems
- Map current customer journey and identify personalization opportunities
- Define personalization goals aligned with business objectives
- Assess privacy compliance and data governance needs

Week 2: Technology Assessment

- Evaluate current personalization technology gaps using Page 4 framework
- Research and shortlist technology solutions for identified gaps
- Calculate budget requirements for technology improvements
- Create technology integration roadmap

Week 3: Content Strategy Development

- Audit existing content for personalization opportunities
- Create persona-specific content variation plans
- Design account-based personalization templates
- Establish content production processes for personalized materials

Week 4: Team Preparation

- Train team on personalization best practices and new processes
- Establish roles and responsibilities for personalization initiatives
- Create measurement and testing protocols
- Set up project management and tracking systems



PHASE 2: IMPLEMENTATION (DAYS 31-60)

Week 5-6: Technology Implementation

- Implement highest-priority personalization technology
- Integrate new tools with existing marketing and sales systems
- Set up data flows and tracking for personalized experiences
- Test technology integration and troubleshoot issues

Week 7-8: Content Creation and Setup

- Create personalized content variations for top personas
- Set up dynamic website content for key audience segments
- Build personalized email campaigns and workflows
- Develop account-specific personalization campaigns

PHASE 3: OPTIMIZATION (DAYS 61-90)

Week 9-10: Launch and Testing

- Launch personalized campaigns and experiences
- Implement A/B testing for personalized vs. generic content
- Monitor performance metrics and user engagement
- Gather feedback from sales team and customers

Week 11-12: Analysis and Scaling

- Analyze personalization performance and ROI
- Identify highest-performing personalization tactics
- Scale successful approaches to additional segments and channels
- Plan next phase of personalization improvements

ROI Projection Calculator

PERSONALIZATION INVESTMENT ROI CALCULATOR

STEP 1: BASELINE PERFORMANCE METRICS

CURRENT EMAIL OPEN RATE: ____%

CURRENT EMAIL CLICK-THROUGH RATE: ____%

CURRENT WEBSITE CONVERSION RATE: %

CURRENT AVERAGE DEAL SIZE: \$

CURRENT SALES CYCLE LENGTH: ____ DAYS

STEP 2: EXPECTED PERSONALIZATION IMPROVEMENTS

*(INDUSTRY BENCHMARKS: EMAIL OPENS +20%, CTR +40%,
CONVERSIONS +30%)*

EXPECTED EMAIL OPEN RATE IMPROVEMENT: ____%

EXPECTED CTR IMPROVEMENT: ____%

EXPECTED CONVERSION RATE IMPROVEMENT: ____%

EXPECTED DEAL SIZE INCREASE: ____%

EXPECTED SALES CYCLE REDUCTION: ____%

STEP 3: INVESTMENT CALCULATION

TECHNOLOGY COSTS (ANNUAL): \$_____

CONTENT CREATION COSTS: \$_____

IMPLEMENTATION COSTS: \$_____

STAFF TIME COSTS: \$_____

TOTAL INVESTMENT: \$_____

SSSTEP 4: REVENUE IMPACT PROJECTION

CURRENT MONTHLY QUALIFIED LEADS: _____

PROJECTED LEAD INCREASE WITH PERSONALIZATION: _____%

NEW MONTHLY LEADS: _____

CURRENT LEAD-TO-CUSTOMER RATE: _____%

PROJECTED CONVERSION IMPROVEMENT: _____%

NEW CONVERSION RATE: _____%

CURRENT AVERAGE CUSTOMER VALUE: \$_____

PROJECTED VALUE INCREASE: _____%

****NEW AVERAGE CUSTOMER VALUE: \$_____****

MONTHLY REVENUE IMPACT CALCULATION:

NEW MONTHLY LEADS × NEW CONVERSION RATE × NEW CUSTOMER VALUE = \$_____

ANNUAL REVENUE IMPACT: \$_____ × 12 = \$_____

ROI CALCULATION:

(ANNUAL REVENUE IMPACT - TOTAL INVESTMENT) / TOTAL INVESTMENT × 100 = _____%

PAYBACK PERIOD: TOTAL INVESTMENT / MONTHLY REVENUE IMPACT = _____ MONTHS



Next Steps & Advanced Strategies

IMMEDIATE ACTIONS

- Calculate your Personalization Maturity Score and identify your current level
- Complete the Technology Gap Analysis to understand your infrastructure needs
- Use the ROI Calculator to build a business case for personalization investment
- Begin Phase 1 of the 90-day improvement plan within the next week

ADVANCED PERSONALIZATION STRATEGIES:

- Predictive Personalization Use AI and machine learning to predict what content, offers, and experiences each prospect will respond to before they even request them.
- Cross-Channel Personalization Coordinate personalized experiences across email, website, social media, advertising, and sales outreach for consistent, relevant messaging.
- Real-Time Personalization Adjust content, recommendations, and experiences in real-time based on current behavior and context.
- Account-Based Hyper-Personalization Create completely custom experiences for high-value accounts, including personalized microsites, custom content, and bespoke campaigns.

QUESTIONS FOR DEEPER ASSESSMENT:

- How quickly can you personalize experiences for new prospects?
- What percentage of your content is personalized vs. generic?
- How do you measure the business impact of personalization efforts?
- What's preventing you from scaling personalization across more touchpoints?



Additional Resources

IMMEDIATE ACTIONS

- Calculate your Personalization Maturity Score and identify your current level
- Complete the Technology Gap Analysis to understand your infrastructure needs
- Use the ROI Calculator to build a business case for personalization investment
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