

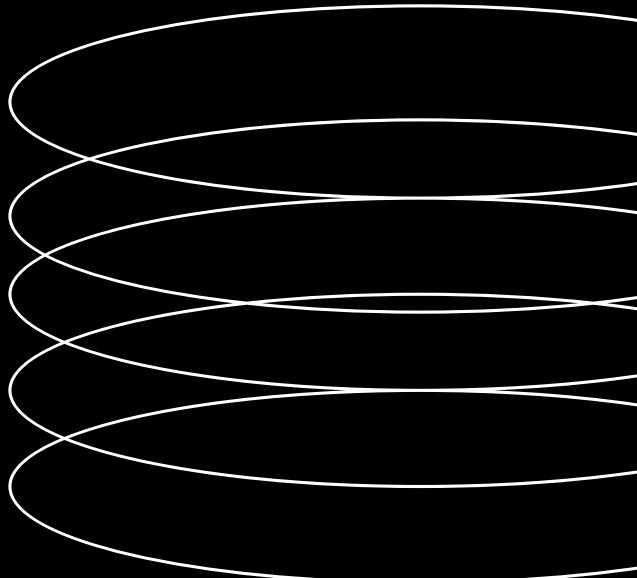
Discover Exactly Where Your Personalization Efforts Stand

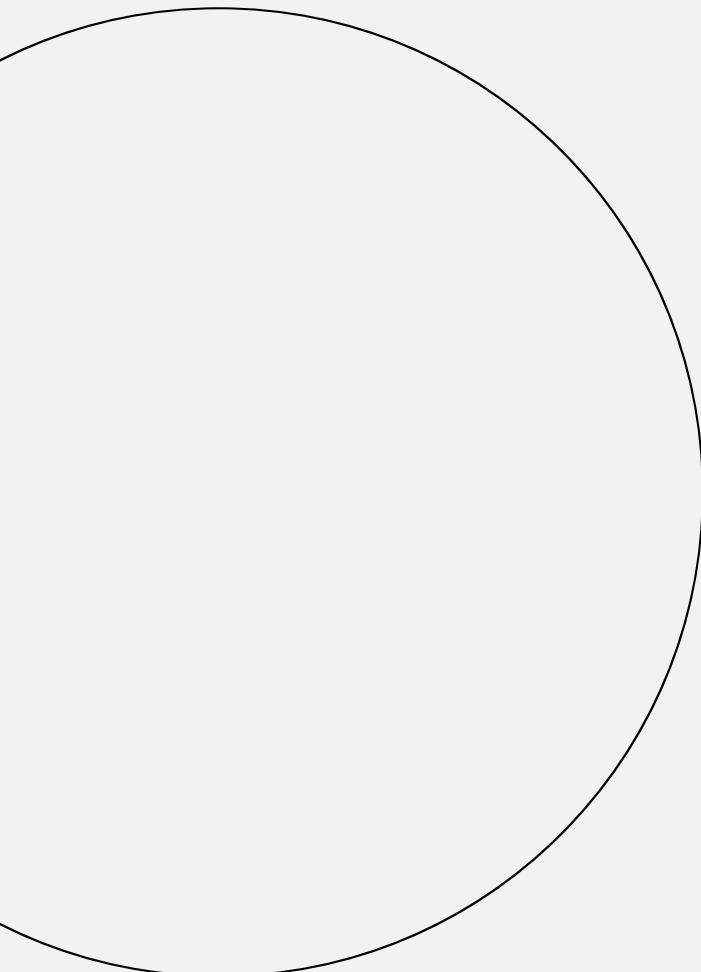
# The B2B Personalization Maturity Assessment



## 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

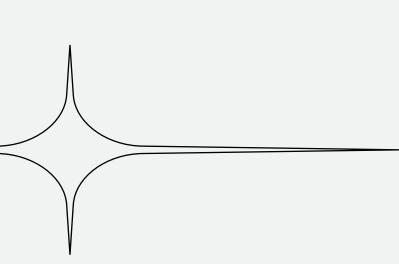
This isn't personalization. It's basic segmentation with delusions of grandeur.

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**

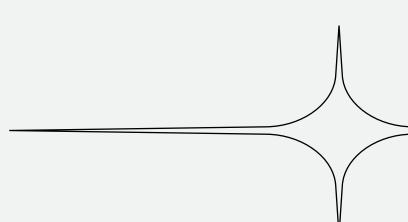
- We segment based on behavior, not just demographics
- Our segments are actionable and lead to different treatments
- We have account-level segmentation for B2B buying groups
- We regularly test and refine our segmentation approach
- We can create dynamic segments based on real-time behavior

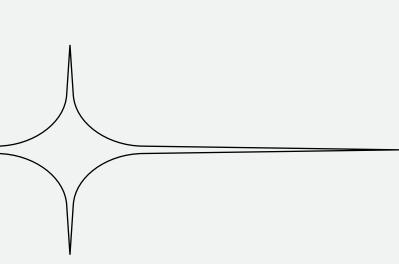
**Score: \_\_\_/25**

## **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

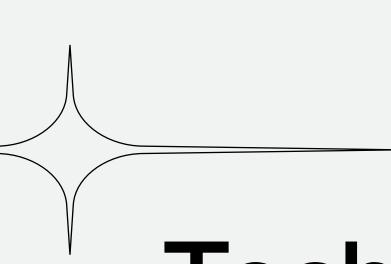
## **Level 4: Mastery (121-150 points)**

**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

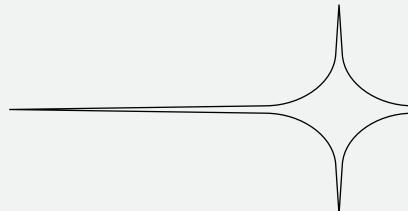
**Gap Score:** \_\_\_/5

### 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: \$\_\_\_\_\_**

### **SSTEP 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:

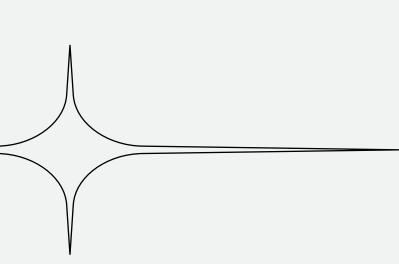
NEW MONTHLY LEADS × NEW CONVERSION RATE × NEW CUSTOMER VALUE = \$\_\_\_\_\_

**ANNUAL REVENUE IMPACT: \$\_\_\_\_\_ × 12 = \$\_\_\_\_\_**

**ROI CALCULATION:**

$(\text{ANNUAL REVENUE IMPACT} - \text{TOTAL INVESTMENT}) / \text{TOTAL INVESTMENT} \times 100 = \text{_____ \%}$

**PAYBACK PERIOD: TOTAL INVESTMENT / MONTHLY REVENUE IMPACT = \_\_\_\_\_ MONTHS**



# Next Steps & Advanced Strategies

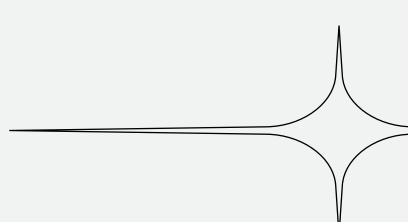
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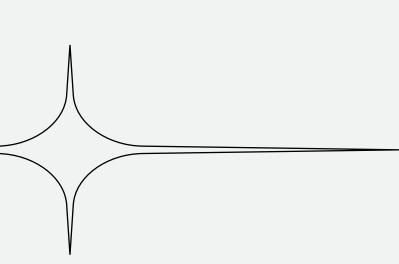
- Calculate your Personalization Maturity Score and identify your current level
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- Begin Phase 1 of the 90-day improvement plan within the next week

## 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

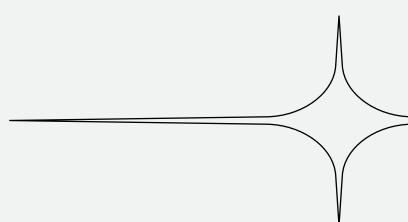
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MARKETING  
TRANSFORMATION BUNDLE

AI MARKETING ROI  
CALCULATOR

## Free Resources

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REALITY CHECK KIT

B2B EMAIL MARKETING  
AUDIT TOOLKIT