

Technology readiness isn't just about tools and data—it's about empowering teams to take action. Trusted data, reliable tools, and strong governance make it easy to experiment, personalize, and improve digital experiences.

Use this worksheet to assess where your organization stands, uncover opportunities for improvement, and spark conversations about quick wins and long-term solutions.

Tool inventory: List which tools in your tech stack you use to build digital products and experiences.

How do you analyze customer behavior? Run experiments? Connect to your marketing channels?

[Write your answer here]

Tech stack performance: Use check marks to rate your tech stack on a scale of 1 (poor) to 5 (excellent).

How well does your current tech stack enable you to:	1	2	3	4	5
Collect and unify customer data					
Enable self-service insights for teams					
Run experiments across channels					
Personalize experiences across channels					
Automate and promote data governance practices					
Capture qualitative behavioral insights					

Friction points: Where is the friction in your tech stack?

[Write your answer here]

Data is the foundation for all digital products and experiences. How strong is your foundation? Assess and reflect using the questions below and these [data governance worksheets](#) to dive deeper.

Data readiness check: True or false

	True	False
We have a single source of truth for customer data.		
Our data is accurate and well-governed.		
Teams can easily access and analyze the data they need.		
Our data enables real-time decision making.		
Data breakdowns or gaps rarely disrupt operations.		

Data reliability: Where or when does data break down or become unreliable?

[Write your answer here]

Data-driven action: What do teams do with their insights?

(e.g., Do they drive experimentation decisions? Personalize campaigns? Make product decisions? Share insights across teams?)

[Write your answer here]

Integrations: How well do all your tools integrate?

(e.g., Is data synced across systems? Can you bi-directionally integrate with marketing and advertising platforms?)

[Write your answer here]

It's time to collaborate and listen! Building digital experiences is a team sport, but who owns what?

Ownership: Who owns technology decisions in your organization? (Check all that apply)

- Product
- Marketing
- Growth
- Engineering
- IT
- Other: *[Specify]*

Collaboration: Do product, marketing, and growth teams have clear processes to collaborate on technology decisions?

- Yes No

Improvement: What's one area your teams need to improve on cross-functional collaboration?

[Write your answer here]

Quick wins: What is one small improvement you can make in the next 30 days?

(e.g., improve data tagging, create a dashboard, set up an experiment)

[Write your answer here]

Strategic investment: What is one larger investment your team should prioritize in the next 6-12 months?

(e.g., upgrade analytics tools, improve data governance, build an experimentation framework)

[Write your answer here]

Experimentation is essential for growth teams, but if you do it wrong, you might as well not do it at all. To make your experiments worthwhile, predictable, and sustainable, align your tests around business growth and customer problems using our [7-step experimentation framework](#).

1. Define a growth lever

Frame your experiment around a business outcome.

- Acquisition Retention
- Monetization

2. Define a customer problem

Elaborate on the problem in the customer's words.

3. Develop a hypothesis

Define why you think the problem exists.

4. Brainstorm solutions and KPIs

Ideate solutions and [metrics](#) to measure their success.

Solution A	KPI
Solution B	KPI
Solution C	KPI

5. Prioritize solutions

Arrange your solutions based on low implementation cost, high business impact, and high confidence.

- 1.
- 2.
- 3.

6. Create an experiment statement

Use steps 1–5 to write a statement to frame your experiment, then run your tests.

_____ is underperforming
[Growth lever]

because _____

_____ due to
[Customer problem]

[Hypothesis]

so we will iterate on the _____

[Solution]

to improve the _____.

[KPI]

7. Learn and iterate

Document your experiment learnings. Based on the results, return to step 2 and redo the framework.

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In a few short years, personalization has gone from a promising trend to a permanent fixture of the digital landscape. When done right, personalization creates a cohesive customer experience. This worksheet is designed to help you evaluate where your organization is crushing it and where to improve. You can also dive deeper into personalization best practices with this [guide](#).

Level of personalization

Check the box that best describes your organization.

No personalization

One to many: Demographic personalization

One to few: Behavioral personalization

One to one: Predictive personalization

To get to the next level of personalization, our team needs to:

Level of personalization

Check the box that best describes your organization.

Segment 1:

Segment 2:

Segment 3:

Key personalization touchpoints

Describe where you deliver personalized experiences to your customers.

This drives (check box):

Acquisition | Retention | Monetization

This drives (check box):

Acquisition | Retention | Monetization

This drives (check box):

Acquisition | Retention | Monetization

This drives (check box):

Acquisition | Retention | Monetization

This drives (check box):

Acquisition | Retention | Monetization

This drives (check box):

Acquisition | Retention | Monetization

Personalization channels

Check the boxes that apply.

	Current	Future
Email		
Push/SMS		
Web/Digital		
In app		
Print/Direct mail		
Search		
Ad networks		
Other (describe)		

Personalization at scale: Scaling personalization is a key concern for many organizations. Evaluate the four categories below to understand whether your organization is set up to scale.

1. Data collection and management

Do you collect and govern consent-driven, First-party data?

What we've done to improve this:

What we should do to improve this:

Current state (check box):

- Excellent | Satisfactory | Needs improvement
- Address urgently

2. Process and alignment

Do you have the right processes in place? Are teams working together on the same goals?

What we've done to improve this:

What we should do to improve this:

Current state (check box):

- Excellent | Satisfactory | Needs improvement
- Address urgently

3. Experimentation

Does your team continually iterate on your personalization strategies?

What we've done to improve this:

What we should do to improve this:

Current state (check box):

- Excellent | Satisfactory | Needs improvement
- Address urgently

4. Self-service insights and activation

Can marketers get insights into the customer journey and manage audiences without analyst or engineering bottlenecks?

What we've done to improve this:

What we should do to improve this:

Current state (check box):

- Excellent | Satisfactory | Needs improvement
- Address urgently

Top key performance indicators

How do you measure personalization success?

KPI: **Current value:**

KPI focus:

- Acquisition | Retention | Monetization

KPI: **Current value:**

KPI focus:

- Acquisition | Retention | Monetization

KPI: **Current value:**

KPI focus:

- Acquisition | Retention | Monetization

Personalization efficacy

After reviewing your assessment, grade your personalization strategy and execution. Check the box that applies.

Excellent

Satisfactory

Needs improvement

Address urgently