

PERSONALIZATION VENDOR EVALUATION CHECKLIST

BY ALGONOMY



Personalization has become the differentiator in an increasingly crowded commerce environment. Whether you sell essential goods, fashion and apparel, specialty items or luxury goods, the ability to scale and deliver tailored and connected experiences to customers is critical to conversions and long-term customer value.

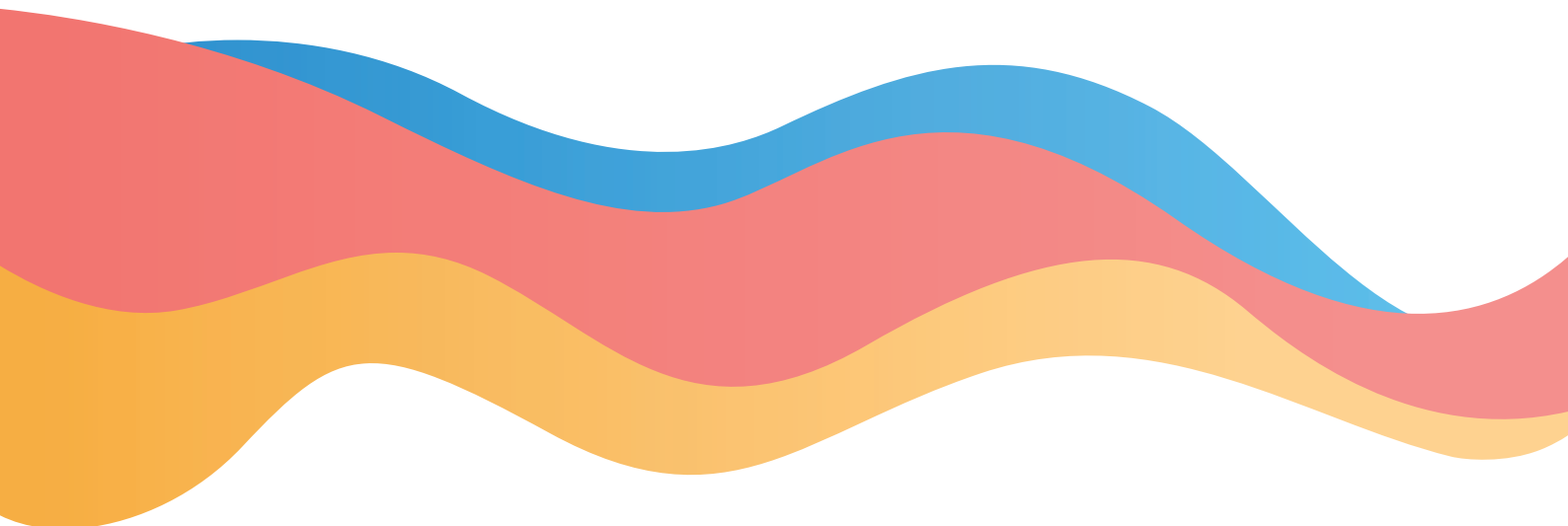
Today, brands and retailers must have a complete personalization strategy, one that can recognize individuals across touch points, learn where they are in the buying journey and understand why they buy - not just how. They need to leverage the most advanced AI to optimize for their business goals and KPIs.

Whether you're considering commerce personalization for the first time, or feel the need to upgrade to a more sophisticated product that does not require manual merchandising and rules, getting your requirements right is the first step.

The process can be daunting, as it's hard to research and put together capabilities such that your investment is future proof and does not outgrow your needs next year.

This evaluation checklist is intended to serve as a base set of capabilities that you should look for in enterprise grade vendors for your personalization needs. Please do modify this and add your own requirements based on specific programs and applications of personalization that are important to you (for example, replenishment/re-buy use cases, email personalization at open-time or auto-complete search suggestions).

We break down this checklist by different personalization modules of Product Recommendations, Content, Search and Browse/ Navigation. In addition, the decisioning engine, foundational real-time customer profiles are critical to personalization.



SNO	EVALUATION CRITERIA		DESCRIPTION	CAPABILITY LEVEL	SUPPORTED BY VENDOR? (Y/ N/ PARTIAL)	VENDOR REMARKS
1	Recognized as a Personalization Leader					
2	Foundation of personalization		Is personalization based on the foundation of a real time customer data platform, combining online and offline interactions for a unified, living profile?	Advanced		
3	Full lifecycle personalization	Product recommendations	Can the engine personalize product recommendations for cross-sell and upsell in a 1:1 manner?	Basic		
		Personalized content	Can content and offers be personalized based on individual affinities, profile and behavior?	Basic		
		Personalized search	Can the search results leverage behavioral data for 1:1 personalization, so each shopper sees different results - by design?	Basic		
		Personalized browse and navigation	Can category pages be re-sorted and personalized based on customer affinities and behavior?	Basic		
		Out of the box strategy library	Is there a comprehensive library of pre-built personalization strategies ranging from topsellers and collaborative filtering to individual personalized?	Intermediate		
		Consistent Experience	"Kim viewed organic cheeses in the last session, but didn't purchase. She comes back to the site today, can her experience be based on her affinity for organic food and dairy products? Can complete-the-meal suggestions be customized to her preferences? Can search results for pineapple show organic fruit upfront, even when she does not specify 'organic'? Can the engine infer her granular preferences and connect the experience through her buying journey, on every touchpoint?"	Intermediate		
4	Ensemble based decisioning		Does the engine's decisioning architecture pick the winning strategy for each customer in a contextual, real-time manner? Does it leverage ensemble models to pick the winning experience or is it based on a single key understanding, or is rule driven?	Advanced		
5	Product recommendations	Solving cold starts	How does the engine handle cold start scenarios, i.e., first-time and new shoppers that don't have historical data? Can it use contextual signals such as geo-location, device, weather, and real-time behavior to make the 'cold start' warm?	Basic		
		1:1 personalization	Can the engine personalize for the individual - instead of using broad, static segments? For e.g., will two shoppers who add the exact same product to the cart get different cross-sell recommendations, based on their price sensitivity, category affinities and brand preferences, as well as granular attributes such as colors, style, taste, health...?	Intermediate		
		Handling long tail and new products	Can new and long tail products, those without historical events be surfaced in recommendations, using text data and descriptions?	Advanced		
		Recommendations based on visual characteristics	Is Deep learning based Visual AI available to surface visually similar products? Can Visual AI be used for complete-the-look recommendations, for human expert like recommendation curation without manual inputs	Advanced		
		Social proofing	Can live demand or inventory status for a product be shown, such as "28 people bought this in last one hour" to create urgency amongst the shoppers?	Intermediate		
		In-store Personalization	Can personalization be extended to the clienteling app, store aisle location based app personalization, e-receipts etc.	Advanced		
		6	Content and offer	Segment export for retargeting	Can segments and recommendations be pushed to campaign execution tools in a way that allows for easy additional segmentation and to facilitate automated campaigns across channels (email, sms, website, app)	Basic
Personalized Landing Pages	Can website landing pages be personalized based on customer, click through URL, past purchases and session context ?			Basic		
Time/ location/ cart contents based personalization	Can offers be dynamically personalized based on different contexts like -time of the day, customer location, device, cart status, cart value, weather etc.?			Intermediate		
Auto-discovery of segments	Can AI automatically detect and assign relevant segments to customers for segment (offer sensitive, brand lover) based content and experiences?			Intermediate		
Dynamic experiences	Can pop up banners be triggered based on real time signals - e.g. exit intent, time spent on page, segment affinity etc.?			Intermediate		
Algorithmic testing	Can AI auto-select and optimize best performing banners/ offers for a customer?			Advanced		

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7	Search	Interactive and visual search	Can the search experience be interactive, with suggestions key-stroke by key-stroke , and real-time visual results?	Basic		
		1:1 personalized results	Can the search results be personalized based on behavioral data and past purchases?	Advanced		
		Real time catalog updates	Does product catalog get updated and indexed in real time, with any changes in pricing and availability reflecting immediately?	Advanced		
		Self-learning search	Does search learn from aggregate user queries and interactions to automatically enhance synonym library and improve relevance of results?	Intermediate		
		Merchandising controls	Can certain products or brands be boosted/ buried in search results?	Advanced		
8	Browse and navigation	1:1 category pages	Can a highly personalized, sorted category list and product list be created in real time, to help a shopper find the perfect product on the first few rows?	Basic		
		Merchandising controls, coat tail merchandising	Can certain products/ brands be boosted (e.g. high margin, high stock) or buried (low stock) in product listings?	Advanced		
			Can personalization weightage be tuned or delayed as required?	Advanced		
			Can discovery of a new brand be improved by mapping it to known popular brands?	Intermediate		
		Testing	Can different personalization variants, different weights and merchandising rules be tested simultaneously?	Advanced		
9	Omnichannel		Can personalization be extended to other channels including mobile app, email, chat, ads, in-store etc.?	Intermediate		
10	Emails open time personalization		Do the recommendations in email get updated at the time of opening, such that the most recent behavior/ purchases and stock levels influence recommendations shown to an individual	Advanced		
10	Open AI, decision transparency		Is there visibility on 'why' a decision was made by the AI, or is it a black box?	Basic		
			Is there visibility into real time trends on the website?	Advanced		
11	Self-service and strategy flexibility		Can existing strategies/algorithms be tweaked by users without data science intervention?	Intermediate		
			Can content and recommendation widgets be created without developer support?	Advanced		
12	Enterprise class and scale		Can the personalization engine handle large volumes of data (1 million + customers/day) and large catalog sizes (2 million + SKUs) ?	Basic		
13	Extensible		Can technical users build their own models, and include them as part of strategy library used by AI decisioning engine?	Advanced		
14	Speed and performance		Does personalization slow down the website/ app by more than 1 second?	Basic		
15	Privacy and security		Does the product meet best-in-class privacy and security guidelines?	Basic		
16	Global support		Does the provider offer dedicated customer success partners and optimization experts?	Basic		
			Is there 24*7 global support?	Basic		
17	Retail domain expertise		Is it a proven solution with significant retail footprint and expertise?	Basic		
18	Language support		"Can personalization handle multiple languages within one country (e.g. in Thailand both English and Thai)?"	Basic		
19	Implementation and connectors		Are there pre-built connectors for the initial implementation and to make day-to-day catalog updates hassle free?	Intermediate		



Want to dig deeper into these capabilities?
Love to discuss personalization examples and applications?

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