



Template: AI Audience Targeting and Personalization Checklist

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Based on Article: "Using AI for Enhanced Audience Targeting and Personalization"

A practical checklist to enhance audience targeting and personalization using AI in marketing.

Checklist Items:

1. Prepare Event-Level Analytics

Export 30–90 days of event-level user data into a schema you can query, ensuring to instrument pageviews, clicks, conversions, and other custom events.

Reference Section: Prerequisites & What You'll Need

2. Validate User Identity Store

Ensure your CRM or unified profile accurately maps device IDs, emails, and includes key user attributes like lifecycle stage and last active timestamps.

Reference Section: Prerequisites & What You'll Need

3. Ensure AI Model Access

Confirm that your chosen AI model provides API access, compatibility with your traffic, and identify rate limits for successful query execution.

Reference Section: Prerequisites & What You'll Need

4. Set Up Testing and Experiment Platform

Integrate an A/B testing or feature-flagging system to measure the effectiveness of personalized content strategies and establish guardrails for experiments.

Reference Section: Prerequisites & What You'll Need

5. Confirm Tech Connectivity

Verify that your CMS or CDN can accept real-time personalization signals like headers, cookies, or API calls to ensure seamless content delivery.

Reference Section: Verify tech connectivity

6. Check Privacy Governance

Review privacy consent flows and storage retention policies to ensure compliance and define measurable KPIs for the personalization strategy.

Reference Section: Confirm governance

7. Collect and Prepare Audience Data

Gather raw events, CRM attributes, and behavioral signals into a staging area, then transform them into a unified, deduplicated user record ready for segmentation and model input.

Reference Section: Step 1 — Collect and Prepare Audience Data

8. Create Unified User Schema

Define and document a canonical user object with fields such as user_id, email_hash, and interest_topics, mapping your data sources accordingly.

Reference Section: Step 1 — Collect and Prepare Audience Data

9. Deduplicate and Normalize Data

Implement deduplication by matching on primary IDs and normalizing values such as strings and date formats, resolving conflicts systematically.

Reference Section: Step 1 — Collect and Prepare Audience Data