



# 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](#)