

PRACTICAL BUSINESS GUIDE

Personalisation

Explain where AI-driven personalisation improves a customer experience and where unexpected specificity, stale data or poor control makes it feel invasive.

The Line Between Relevant and Intrusive

Personalisation adapts a message or experience using information about a customer, their preferences, behaviour or relationship with the business.

01

Use expected data.

Remembering a known preference can make repeat interactions easier.

02

Create a clear benefit.

Unexpected specificity makes the customer question how the data was obtained.

03

Keep control visible.

Wrong personalisation can feel worse than no personalisation because the error is made personal.

Use this guide →

PURPOSE

The problem this guide helps you see

MISSION

Explain where AI-driven personalisation improves a customer experience and where unexpected specificity, stale data or poor control makes it feel invasive.

WRITTEN FOR

Businesses using customer data in email, websites, advertising or service journeys and unsure whether the experience feels useful, inconsistent or overly familiar.

ACCURACY BOUNDARY

No tool has a universal safe level of personalisation. The line depends on customer expectation, explainability, accuracy, benefit and control.

DEFINITION

Personalisation adapts a message or experience using information about a customer, their preferences, behaviour or relationship with the business.

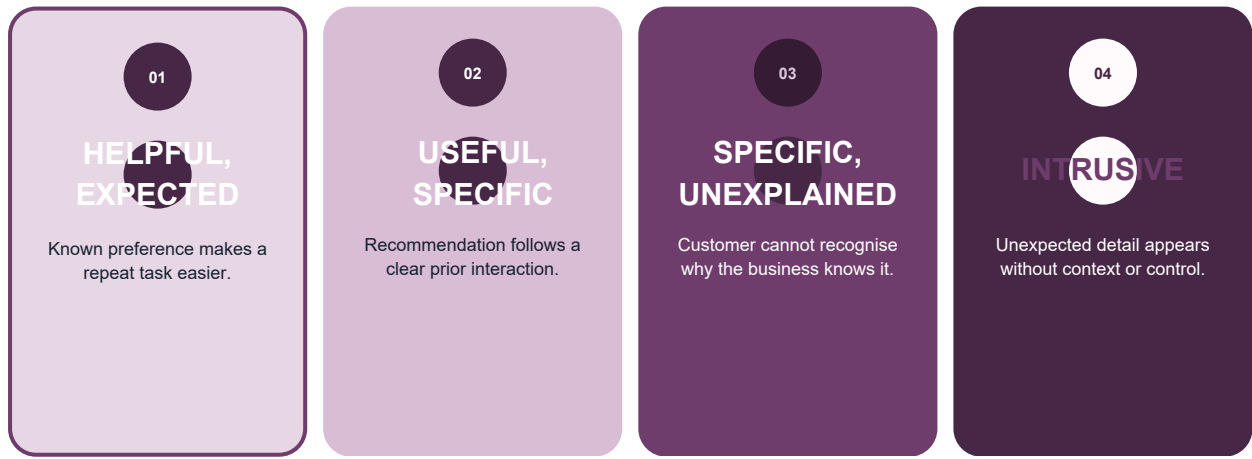
THINK OF IT LIKE THIS

A good shopkeeper remembers your usual order; mentioning something you never told them crosses a line.

MECHANISM

The Line Between Relevant and Intrusive

Use the mechanism to separate production speed from evidence, customer trust and commercial value.



CUSTOMER FEELS UNDERSTOOD



CUSTOMER FEELS OBSERVED

The boundary is contextual: expectation, benefit, accuracy and control matter more than technical sophistication.

STABLE TEST

AI products and interfaces change. Inspect the final claim, customer experience, evidence, measurement and named human owner.

COMMERCIAL EFFECT

Why this matters beyond faster production

AI can change the cost and speed of marketing work. The commercial test is what happens to quality, trust, customer behaviour and the final outcome.

WHAT CHANGES

Convenience

Remembering a known preference can make repeat interactions easier.

WHAT CHANGES

Trust cost

Unexpected specificity makes the customer question how the data was obtained.

WHAT CHANGES

Accuracy

Wrong personalisation can feel worse than no personalisation because the error is made personal.

WHAT CHANGES

Control

An opt-out lets customers adjust the relationship without abandoning it.

WHAT CHANGES

Coherence

Channels that recognise customers differently expose weak coordination.

WHAT CHANGES

Restraint

Low-stakes interactions often gain little from extra specificity.

Accuracy boundary: no model capability, performance result or universal benchmark is promised.

FAULT REGISTER • 1 OF 2

What I would flag

Severity reflects customer and business impact, not a score assigned by an AI product.

CRITICAL

The message uses unexpected private data

Personalised messaging references information the customer never knowingly provided.

The experience can feel like surveillance rather than service.

MAJOR

There is no practical opt-out

The customer cannot reduce personalisation without leaving the relationship.

People who dislike the experience must disengage completely.

MAJOR

Stale or incorrect data drives the message

Old preferences or status create an obviously wrong interaction.

The attempt to appear relevant instead proves the business does not understand the customer.

FAULT REGISTER • 2 OF 2

What I would flag

Severity reflects customer and business impact, not a score assigned by an AI product.

MODERATE

Low-value moments are over-personalised

Specific detail is inserted simply because the system can.

The data use becomes more visible without making the task easier.

MODERATE

Channels feel inconsistent

Email, website, advertising and service interactions reflect different levels of customer knowledge.

The relationship feels fragmented and unpredictable.

READ NEXT

Measuring AI Marketing

Personalisation should still be judged by whether it improves meaningful customer and business outcomes.

Read next →

CORRECTION

The assumption that keeps this problem alive

COMMON MYTH

More personalisation is always better.

Better framing: Personalisation stops helping when specificity exceeds expectation, uses wrong information, removes control or fails to create a genuine customer benefit.

WHY IT PERSISTS

Capability is mistaken for value

Available data is used without asking whether it improves the task.

WHY IT PERSISTS

The customer context is hidden

The team knows the data source but the recipient may not.

WHY IT PERSISTS

Channels evolve separately

Each system creates its own version of the customer relationship.

WORKING CONTROL

Expected data

Use information the customer knowingly provided or reasonably expects you to remember.

WORKING CONTROL

Benefit test

Specificity should reduce effort or improve relevance.

WORKING CONTROL

Visible choice

Allow people to correct preferences or choose a simpler experience.

Useful boundary: AI can change the workflow. It does not remove editorial judgement, verification, customer trust or commercial measurement.

STANDARD

What a working version looks like

Aim for a durable marketing condition rather than a universal tool, model or publishing cadence.

AREA	FAILING PATTERN	WORKING PATTERN
Data source	Customer cannot explain it	Expected and explainable
Benefit	Specificity for its own sake	Task becomes easier or more relevant
Freshness	Old data keeps driving messages	Preference data is refreshed
Control	No practical opt-out	Customer can reduce or stop it
Proportion	Low-value moment is intimate	Specificity matches the task
Channels	Contradictory relationship	Major touchpoints are coherent

QUICK SELF-CHECK

- Customers can understand the data source
- Personalisation creates a clear benefit
- Important preferences are current
- A practical opt-out exists
- Low-stakes moments remain proportionate
- Major channels feel coherent

RELEVANT FOLLOW-UP SERVICE

Email Marketing Setup

Use this when the workflow needs clearer controls, ownership or measurement.

from \$349

DUE DILIGENCE

Five questions worth asking whoever owns the marketing process

Strong answers should explain the current workflow, evidence and ownership without relying on AI terminology.

- 01 **What customer benefit does this personalisation create?**

- 02 **Would the customer understand where the information came from?**

- 03 **How can they opt out or correct it?**

- 04 **How stale can the data become before the message feels wrong?**

- 05 **Do other channels recognise the same customer consistently?**

EVIDENCE CHAIN

Ask what the business can verify, not what the tool can generate. A strong process remains understandable when the product changes.

The Line Between Relevant and Intrusive.

Use expected data. Create a clear benefit. Keep control visible. Keep production speed, human judgement and commercial value connected.

PRIMARY NEXT STEP

Measuring AI Marketing

Personalisation should still be judged by whether it improves meaningful customer and business outcomes.

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Want help applying this to your business?

Bring me the personalised message or journey that feels clever but slightly uncomfortable. I can review the data source, benefit, freshness and opt-out path.

[Discuss the task →](#)