

Personalized Video Campaign Worksheet

Context: Most personalized video projects don't fail because of the vendor—they fail because teams don't align on goals, data, and ownership early.

Use this worksheet to align your team before evaluating vendors or launching a personalized video initiative.

1. Define Success First

Before comparing vendors, align on what success actually means.

Question (Alignment Goal)	Internal Answer / Strategy
What journey are we improving? (e.g., onboarding, reactivation, retention)	
What action should the viewer take? (The primary CTA)	
What KPI defines success? (CTR, conversion, activation, etc.)	
What audience are we starting with? (Initial pilot scope)	
What results justify scaling? (The "Success Benchmark")	

2. Data, Privacy & Security

Most delays happen here—surface these requirements early.

Data & Flow

What data is required? (e.g., name, behavior, account data)	
Where will this data be processed? (Cloud vs. On-premise)	

Compliance & Control

Who needs to approve this? (Legal, DPO, IT, Compliance)	
What requirements must be met? (e.g., GDPR, SOC2, internal policies)	
Do we need restricted visibility? (Anonymized delivery or secure access)	
What is the deletion policy? (How long are videos and data stored? Are logs deleted?)	

3. Ownership & Execution

Clarify responsibilities before starting.

Task	Internal Owner	Notes / External Support
Create base video		

Build personalization logic		
Manage approvals		
Launch/Deploy campaign		
Performance monitoring		
Technical Support		

4. Compare Vendors (Beyond Features)

Evaluate based on fit—not just functionality. Use this checklist to evaluate which platform actually fits your team, workflow, and campaign goals.

Category 1: Flexibility & Workflow

Criteria	Why It Matters	Vendor A	Vendor B	Vendor C
Works with your existing video tools (AE, Canva, etc.)	Avoids recreating assets from scratch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supports both no-code and developer workflows	Enables collaboration across teams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom logic and conditional video behavior	Needed for real personalization at scale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can adapt to different use cases (marketing, onboarding, CX)	Prevents tool limitations later	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provides a dashboard (Intelligence/Analytics, etc.)	Gives more control over time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Category 2: Scalability & Automation

Criteria	Why It Matters	Vendor A	Vendor B	Vendor C
Bulk video generation (CSV, CRM, API)	Required for real campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automated video creation (no manual production)	Saves time and cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handles large volumes reliably	Critical large campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handles small volumes as well	Critical smaller campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Category 3: Interactivity & Experience

Criteria	Why It Matters	Vendor A	Vendor B	Vendor C
In-video CTAs (buttons, forms)	Drives conversions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personalized landing pages per viewer	Improves engagement and tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Viewer-level tracking and analytics	Enables optimization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Category 4: Support & Implementation

Criteria	Why It Matters	Vendor A	Vendor B	Vendor C
Hands-on support (setup, templates, campaigns)	Reduces time to launch and increases time-to-value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic guidance (not just software)	Helps teams succeed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fast onboarding for non-technical teams	Removes adoption friction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Category 5: Security & Infrastructure

Criteria	Why It Matters	Vendor A	Vendor B	Vendor C
ISO 27001 or equivalent certification	Required for enterprise buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data residency options (EU/US/custom)	Compliance or Corporate requirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secure video delivery (anonymization, secure data deletion, etc.)	Protects sensitive data and Corporate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	compliance			
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5. Common Pitfalls to Avoid

Most teams struggle with execution and alignment, not ideas.

- **Starting with creative** instead of clear goals.
- **Underestimating** data, privacy, and approval requirements.
- **Choosing a tool** without considering implementation support.
- **Running a pilot** that's too complex to launch or too small to prove value.
- **Comparing vendors** based only on features or price.

The goal isn't just to choose the right vendor—

It's to set your team up for a project that actually works.

Ready to Turn This Into a Real Campaign?

We'll walk through your use case, review your data and goals, and help you move from evaluation to launch—with clarity.

[!\[\]\(73002692dd5e7a64e60946be3158e719_img.jpg\) Talk to an Expert](#)

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