

B2B Personalization Scorecard

How ready is your ecommerce experience
to deliver true personalization?



Instructions

Use this assessment to determine how ready you are for B2B personalization.

Rate each statement:

0 = Not at all | 1 = Partially/In progress | 2 = Yes, solidly in place

Section 1: Data & Infrastructure Readiness <i>Can you actually know your customer well enough to personalize for them?</i>	
We capture and store user-level data separately from account-level data	
We know the role or job function of the individuals who log into our platform	
We have purchase history accessible at the individual user level, not just the account	
Our ERP or backend systems are integrated with our commerce platform in a way that informs the customer experience	
We track behavioral data on our platform (search terms, browsing patterns, abandonment)	
We have a structured way to collect user preferences — either at onboarding or over time	
Section 1 Total: ___ / 12	



Section 2: Experience Design Readiness

Have you actually designed different experiences for different users?

We have defined the distinct user roles or personas who access our platform	
We have mapped what each role actually needs to accomplish — their workflow, not just their access level	
Our navigation, homepage, and category pages can be configured differently based on who is logged in	
We surface reorder functionality prominently for users with repetitive purchasing patterns	
Users who manage multiple locations or cost centers have a distinct experience that reflects that complexity	
We go beyond account-type segmentation — our personalization reflects individual behavior, not just business category	
Section 2 Total: ___ / 12	

Section 3: Platform & Execution Readiness

Can your current platform deliver on the personalization you've designed?

Our platform supports role-based experiences — not just role-based access or pricing	
We can configure different default views (list vs. grid, catalog vs. reorder) without custom development	
Our search functionality learns from or can be tuned based on individual user behavior	

Section 3: continued	
We have the ability to surface personalized product recommendations based on purchase or browse history	
Our platform supports user-level preference storage that persists across sessions	
We can make experience changes and test them without a full development cycle	
Section 3 Total: ___ / 12	

Your Results

Add up your three section totals for your overall score.

33–36 | **Leading** You're operating at a high level of personalization maturity. The opportunity now is optimization and staying ahead of rising customer expectations. Look hard at your behavioral intelligence layer — that's likely where the next gains are.

23–32 | **Developing** You have meaningful foundations in place but real gaps remain — likely concentrated in one or two sections. Your scores will tell you where to focus. The good news: you're not starting from scratch.

13–22 | **Early Stage** You have some building blocks but personalization is not yet a cohesive capability. Prioritize data and infrastructure first — without the inputs, experience design and platform capability can't deliver. Don't try to solve all three sections at once.

0–12 | **Foundation Needed** Your platform is likely delivering a one-size-fits-all experience regardless of who is logged in. The opportunity for competitive differentiation here is significant — but so is the work required. Start by defining your user roles and auditing what data you actually have.



About

Lost in digital? We're the GPS for your digital roadmap.

B2B Squared guides B2B companies through the chaos of digital evolution with the precision of turn-by-turn navigation. We pinpoint where you are (digital maturity assessments), map the smartest route (strategy workshops), find the right technology pit stops (Platform Genius selection tool), optimize your journey (Flywheel B2B marketing automation and SKU Factory for product data), and help navigate the roadblocks (The Digital Roadmap newsletter).

No guesswork. No detours. Just the fastest, most-efficient route to delivering the digital experience your customers deserve.

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