



# Scaling Personalisation with a Future-Ready Operating Model

**How a future-proof Target Operating Model allows you  
to realise scalable personalisation in marketing**



# Scaling Personalisation with a Future-Ready Operating Model

## Introduction

Today, customers are inundated with a multitude of advertisements and messages. For this reason, it is essential to stand out from the crowd in order to create a unique selling point that fosters long-term relationships. However, companies can only achieve this goal if customers are placed at the heart of the organisation and become the focus of all activities. To effectively scale personalisation and ensure that every touchpoint reaches the customer at the perfect moment, the consumer must be positioned at the centre of a company’s operating model. Optimal personalisation is not a technology or campaign, but a business model. **The connection of data, technology, people and processes as the single source of truth** is more than relevant; it delivers important experiences that impact the business.

M3X, the Marketing & Customer eXperience Mastery Model, forms the foundation for successful transformation. This model enables companies to align marketing, sales and service functions, ensuring measurable and scalable customer focus. The following five theses show how companies should design their Target Operating Model (TOM) to make personalisation an efficient and effective customer experience.

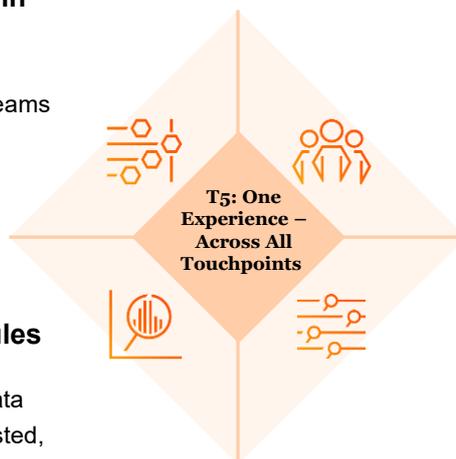
This paper explores how a future-ready Operating Model enables personalisation at scale across markets and interactions, structured around five guiding theses. **Think in Journeys, not in Channels** shifts focus from isolated touchpoints to end-to-end experiences. **Data is King – but only clean data as the Queen rules** emphasises that scalable personalisation relies on trusted, high-quality data. **1:1 is the aspiration – clusters are the reality** balances ambition with feasibility through intelligent segmentation. **What can’t be measured, can’t grow** stresses the need for clear measurement and continuous optimisation. Finally, **One Experience – Across All Touchpoints** presents personalisation as a consistent, omnichannel promise rather than fragmented execution. Together, these theses provide a **blueprint for marketing leaders to design an Operating Model** that elevates personalisation from isolated initiatives to a scalable, measurable, and unified customer experience.

### T1: Think in Journeys, not in Channels

A customer-centric TOM unites teams around personalised journeys for seamless experiences and better results.

### T2: Data is King – but only clean data as the Queen rules

A strong TOM leverages clean data and integrated technology for trusted, scalable personalisation.



### T3: 1:1 is the aspiration – clusters are the reality

Behavioral clustering powered by AI helps TOMs deliver scalable personalised experiences.

### T4: What can’t be measured, can’t grow

A modern TOM embeds rigorous measurement to drive data-driven personalisation and sustainable growth.

Graphic: PwC



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# PwCs Five Guiding Theses for Personalisation

## T1: Think in Journeys, not in Channels

Fragmented customer experiences and inefficiencies in day-to-day operations are the result of companies continuing to plan and execute their marketing activities on a departmental basis. For customers, however, the customer experience is a seamless process that extends from initial contact to purchase to customer loyalty, as they are unaware of the internal structures within a company.

The Target Operating Model (TOM) should focus on the internal structures of the company and concentrate on the actual customer experience. This means that **companies must move from channel-based thinking to journey-oriented thinking** for personalisation to be effective. Companies need to map their end-to-end journeys, identify pain points and focus on personalisation to generate measurable success in terms of customer value and business impact.

For each interaction, **journey-based planning** offers companies a structured way to develop clear hypotheses, triggers and business cases. **The organisation of teams should reflect these journeys with KPIs for marketing, service and sales.** Such a change creates genuine relevance, allowing processes to be better aligned with customer needs and increasing agility. This leads to cross-functional collaboration in M3X. The model enables marketing to provide insights and activations, translates sales relevance into action, and ensures a consistent service experience. When journeys replace silos, personalisation becomes a powerful lever for growth and efficiency.

As today's marketing landscape is changing rapidly, a TOM must reflect the customer experience from awareness to loyalty. A deep understanding of customer journeys and personalisation is necessary to develop successful strategies and optimised interactions that do not focus on broad segmentation or generic messages.

**A customer-centric TOM focuses on personalisation at key moments of the customer journey.** By defining clear hypotheses about customer behavior and interaction triggers, and linking initiatives to measurable business cases, such as higher engagement, stronger loyalty, or improved conversion, marketing can deliver real value. Personalisation allows teams to quickly deliver context-relevant messages at key journey stages. For example, during awareness, customers receive information highlighting the brand's values and tailored offers. This approach builds trust, strengthens relationships, and drives more effective marketing.

**To remain effective, TOMs must continuously adapt using agility, real-time data, and analytics as customer behavior and technology evolve.** Finally, collaboration across marketing, sales, service, and data teams is vital to deliver a unified experience, maximise personalisation, and align strategies with customer needs.



Personalised interactions reduce the likelihood that customers will tune out, increasing overall effectiveness and performance.

**Julian Multani**  
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## T2: Data is King – but only clean data as the Queen rules

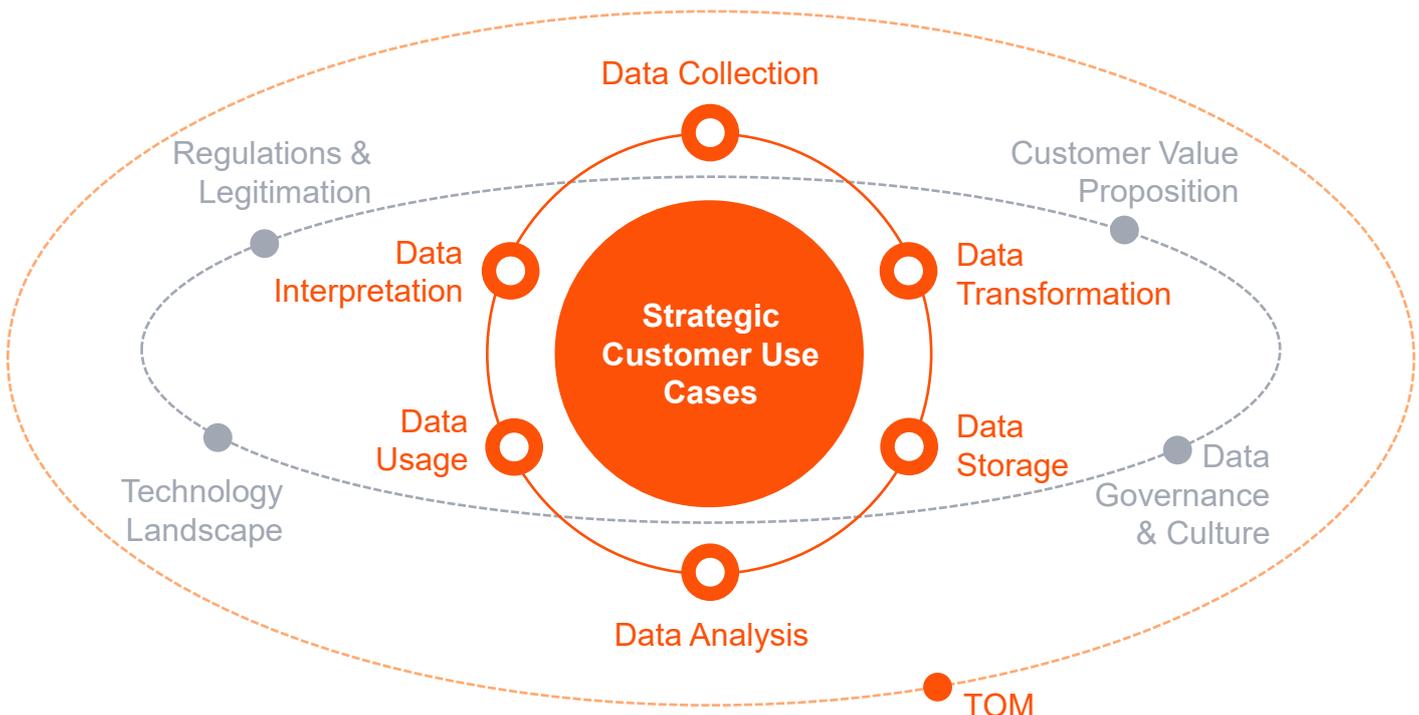
Data is the foundation for personalisation. However, large amounts of data are not effective if companies do not have the necessary structures in place to process the data meaningfully. A Target Operating Model (TOM) that is kept up to date and based on a clear data strategy enables optimal use of data, resulting in high-quality outputs.

**First-party data is at the heart of the strategy**, as only by linking data can a long-term and powerful structure be created. By creating central preference centres, which are necessary for interacting with customers and recording customer preferences, a solid database can be created. Progressive profiling complements this approach by enriching customer profiles with data over time, enabling deep insights into customer profiles without customers having to complete data forms. Attractive offers and clear communication with customers are also important so that they share their information naturally and transparently.

**Ensuring data quality is crucial before implementing automation.** This requires the standardisation and cleansing of data from different sources, the creation of a unified customer view and the definition of governance standards to ensure accessibility, compliance and consistency. This is the cornerstone of trust-based and efficient personalisation.

From a technological perspective, success requires a harmonised marketing technology ecosystem (MarTech) that integrates CRM, customer data platforms (CDPs), analytics and automation tools. This technical integration creates a real-time data flow that aids decision-making and ensures that reliable data automates marketing activities. **Within the M3X framework, the data infrastructure acts as a resource for the marketing, sales and service teams.** It also coordinates measures and creates transparency and efficiency in the operating model. A rapid response to changing customer needs and market dynamics can be achieved through a combined data-and-technology approach that optimises marketing processes, ensuring relevance and personalisation.

In summary, a TOM based on a data strategy is powerful because it focuses on **data precision, progressive profiling and customer-centric value communication.** With an integrated MarTech stack, this foundation enables companies to scale personalised experiences, optimise processes and build stronger, trust-based customer relationships.





### T3: 1:1 is the aspiration – clusters are the reality

Although complete personalisation would be ideal, it is rarely feasible or economical. However, striking the **right balance between efficiency and relevance can have a significant impact**. Structured segmentation based on behavioural patterns, customer needs, and specific use cases must therefore be enabled by a modern TOM.

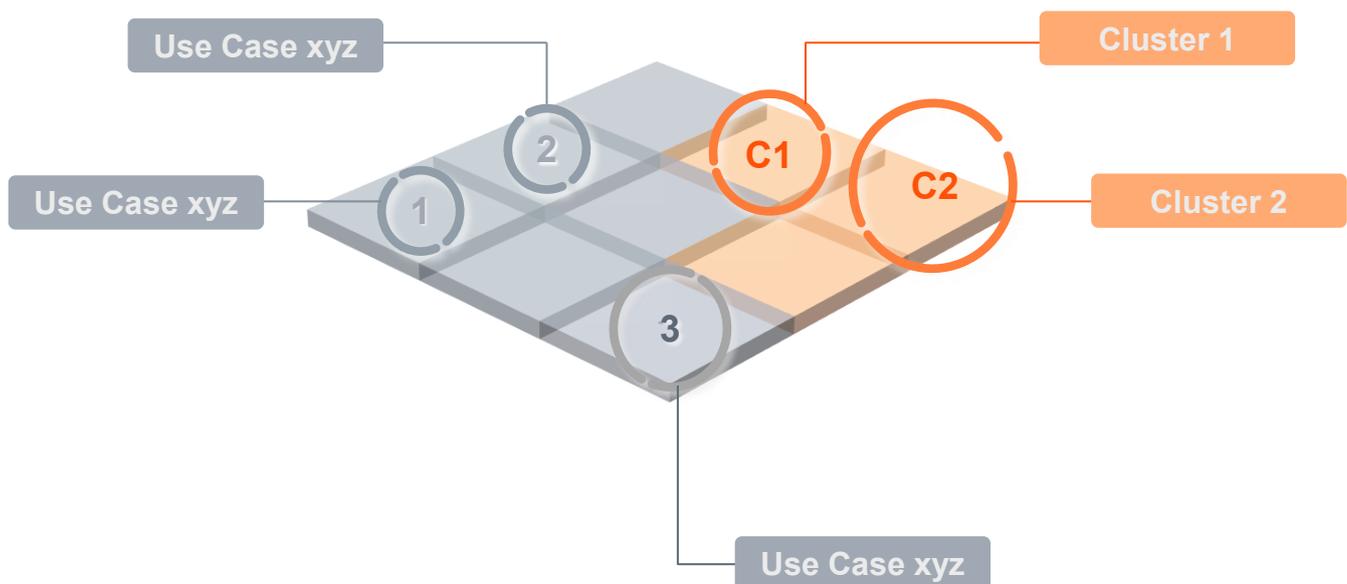
**Through use-case-based clustering**, companies can establish clear rules about which target groups receive which messages at which point in the customer journey. This approach ensures that personalisation remains targeted and measurable, thereby creating efficiency.

Behavioral patterns can be **identified through automation and AI**, as they recognise behavioral patterns and recommend the perfect measures. In the M3X framework, this means integrating content creation, media activation, and customer engagement. Through personalisation based on clustering, companies can offer appropriate and scalable customer interaction. This transforms personalisation from a resource-intensive goal into a sustainable growth engine.

In summary, it is clear that effective personalisation today must take behaviour- and use-case-oriented clusters into account. A TOM can guide the identification of target groups, messages, and timing within the customer journey. This ensures that TOM remains focused on marketing measures and remains effective. It is particularly important that the content always reaches the right target group at the right time. This method enables companies to **maximise engagement and business results without creating unnecessary complexity or costs**.

In the future, a TOM should remain targeted and adaptable in every company so that it can adjust to changes such as customer expectations, technologies, and market dynamics. AI and advancing machine-learning will further improve targeting and resource allocation, resulting in intelligent personalisation strategies.

### Clusters make personalisation scalable





## T4: What can't be measured, can't grow

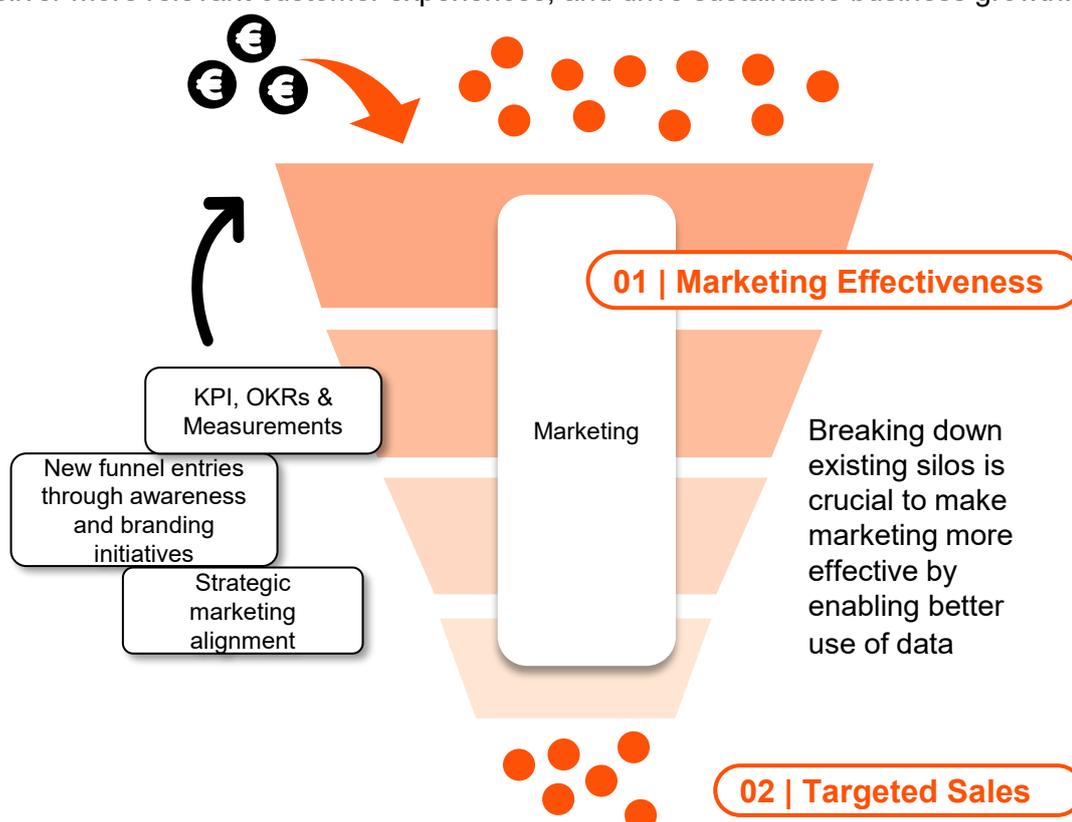
Personalisation measures are not a strategy, but pure intuition if they are not measured. To establish personalisation permanently, companies must anchor the tracking of results in their Target Operating Model (TOM) and move from traditional campaign-oriented communication to continuous performance management. This means that metrics must evolve from channel-specific KPIs to company- and customer-oriented indicators such as increased customer satisfaction, customer lifetime value (CLV), and increased return on marketing investment.

A hypothesis-driven experimental framework is critical to this approach. By formulating clear hypotheses about which personalisation tactics will resonate with specific audiences, marketing teams can design controlled experiments such as A/B testing and holdout groups. **These methods can be used to determine and evaluate the real impact of measures:** A/B testing helps identify the most effective variants of advertising messages, while holdout designs show the incremental increase by comparing exposed and unexposed segments.

In addition to basic experiments, **advanced attribution models such as Marketing Mix Modeling (MMM) and Multi-Touch Attribution (MTA) directly link personalisation measures to business results.** Using these analysis tools, marketing experts can track the contribution of different touchpoints to conversions and thus allocate budgets and resources more intelligently.

These measurement and experimentation practices are embedded in a continuous feedback loop. The insights gained from the analyses are continuously incorporated into strategy, creative development, and channel management, promoting an adaptive organisation that refines its personalisation approach based on measurable results. **This iterative process leads to marketing evolving from isolated testing procedures to agile, data-driven solution finding that better meets changing customer preferences.**

In the future, it will be essential to maintain a thorough and adaptable measurement framework to keep pace with changing customer behavior and technological developments. As new data sources and analytics capabilities emerge, companies must evolve their testing methods to ensure the precision and scalability of their personalisation efforts. **TOM provides the structural foundation for embedding these practices in daily marketing operations,** enabling companies to optimise their personalisation strategies, deliver more relevant customer experiences, and drive sustainable business growth.





## T5: One Experience – Across All Touchpoints

Scalability requires sustainable personalisation above all else. A future-ready Target Operating Model (TOM) **must integrate advanced technologies** that enable intelligent decisions in real time for all customer interactions.

**A unified interface, often referred to as a Next Best Action Engine**, forms the centrepiece of this. An AI-powered system can consistently capture customer behavior, context, and intent, enabling companies to deliver personalised experiences across all channels without increasing manual effort. Automation promotes not only efficiency but also consistency. It reduces the amount of time marketing staff spend on manual tasks such as segmentation and targeting, allowing them to focus on strategic planning and creative innovation.

**Within the M3X framework, automation acts as an important link between strategy and implementation.** The data feeds the engine that controls activation, and the results flow back to support continuous improvement. **This closed-loop feedback cycle transforms personalisation from a resource-intensive manual process into an adaptive, scalable, and measurable capability.**

This approach fundamentally changes marketing. Gone are static, calendar-driven campaigns; instead, **dynamic, real-time interactions tailored to the changing needs of customers take place.** Organisationally, the integration of a unified decision engine streamlines workflows and ensures consistency across all touchpoints. This guarantees a consistent and relevant customer experience, regardless of how or where the interaction takes place.

In the future, the further development of TOMs will include enhanced decision-making capabilities through continuous developments in the field of AI and machine learning. This is particularly relevant as customer expectations continue to rise, with customers demanding real-time support or else switching to the competition.

**In general, it is clear that a future-proof TOM must leverage a centralised, AI-driven Next Best Action Engine to enable personalised, timely customer interactions across all channels.** By analysing behaviour and context in real time, companies can ensure that the right message reaches the right customer at the right time, leading to stronger customer loyalty, satisfaction, and marketing effectiveness, while securing a sustainable competitive advantage.

### Multi-Touchpoint personalisation

