

# Alumni Portal Personalization Playbook

A Practical Checklist for Personalization at Scale Using Salesforce Experience Cloud

This playbook is designed to help institutions move from broad alumni segmentation to meaningful personalization without overcomplicating systems or workflows. It follows a phased approach that builds capability gradually, using data and tools most institutions already have.

The goal is not perfection. The goal is progress that feels intentional, sustainable, and respectful of alumni needs.



## Phase One Strategic Planning and Foundational Segmentation

**Goal:** Define high-impact segments that reflect alumni lifecycle and engagement using existing CRM data.

**Primary tools:** Salesforce EDA and standard CRM fields

### Checklist

- Define alumni lifecycle stages:** Establish three to four lifecycle categories based on graduation date and career progression. Common examples include recent graduates, mid-career, and legacy alumni.  
**Output:** A lifecycle field that can be referenced consistently across systems.
- Establish local versus global context:** Segment alumni based on geographic proximity to campus or regional chapters.  
**Output:** A location-based indicator that informs events and community content.
- Identify disengaged or dormant alumni:** Define criteria for reduced engagement, such as time since last login or last email interaction.  
**Output:** A segment that can be targeted for re-engagement strategies.
- Map primary interests from existing data:** Align fields such as major, college, industry, or program affiliation to content topics.  
**Output:** A clear taxonomy foundation for CMS tagging.

**Success indicator:** Teams can clearly describe who their priority segments are and why, without introducing new tools or data sources.

## Phase Two Technical Architecture and Dynamic Experience

**Goal:** Translate segmentation logic into a dynamic Experience Cloud portal that scales.

### Primary tools:

- Experience Cloud Audience
- Component Visibility
- Salesforce CMS
- Salesforce Flows

## Checklist

- Implement macro targeting with Audiences:** Use page-level audiences only for major structural differences such as navigation or homepage layout.  
**Rationale:** Keeps the number of page variations manageable.
- Enable micro targeting with Component Visibility:** Control individual banners, widgets, and calls to action using user field criteria.  
**Rationale:** Creates a segment of one experience without multiplying pages.
- Tag CMS content using a consistent taxonomy:** Apply topics such as academic discipline, industry, affinity, or geography to all CMS content.  
**Rationale:** Enables dynamic filtering without manual curation.
- Configure CMS collections for dynamic display:** Filter content components based on user profile attributes and content tags.  
**Rationale:** A clear taxonomy foundation for CMS tagging.
- Track behavioral signals using Flows:** Update engagement indicators when alumni interact with key content or actions.  
**Rationale:** Moves segmentation from static data to intent-based signals.

**Success indicator:** The same portal layout delivers meaningfully different experiences based on lifecycle and behavior.

## Phase Three Governance Trust and the Safety Net

**Goal:** Ensure personalization remains accurate, ethical, and resilient over time.

### Primary tools:

- Screen Flows
- Preference Center
- Default Audiences
- Data audits

## Checklist

- Launch a clear preference center:** Allow alumni to indicate interests and communication preferences in simple language.  
**Rationale:** Builds trust and enables consent-based personalization.
- Implement progressive profiling:** Ask for one piece of missing or outdated information at a time using contextual prompts.  
**Rationale:** Improves data quality without creating friction.
- Define a zero data default experience:** Design a high-quality homepage for alumni with limited or missing data.  
**Rationale:** Prevents blank or confusing experiences and encourages engagement.
- Establish ownership and review cadence:** Assign responsibility for segment definitions, content taxonomy, and data health.  
**Rationale:** A clear taxonomy foundation for CMS tagging.
- Connect portal behavior to follow-up communication:** Update engagement indicators when alumni interact with key content or actions.  
**Rationale:** Extends personalization beyond the portal.

**Success indicator:** Personalization continues to work even when data is incomplete or evolving.

### How to Use This Playbook

This checklist is meant to be revisited, not completed once and archived. Institutions can start with Phase One, pause, and still deliver value. Each phase builds on the last without requiring a full overhaul.

#### Use it as:

- A planning tool for advancement leadership
- A shared reference for alumni relations and marketing teams
- A technical roadmap for CRM and Experience Cloud administrators