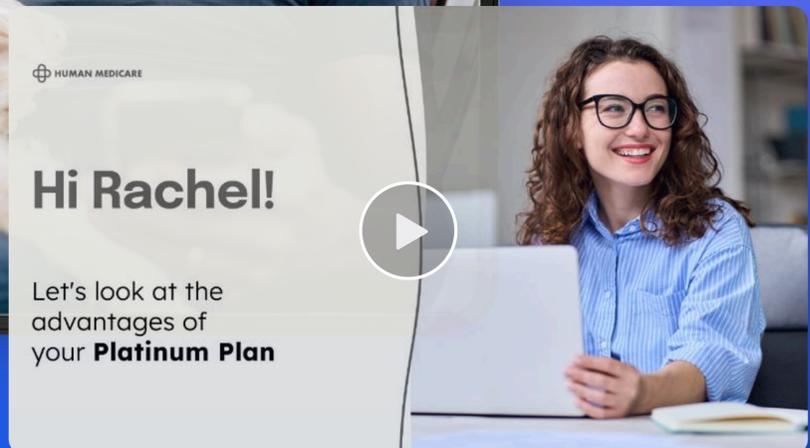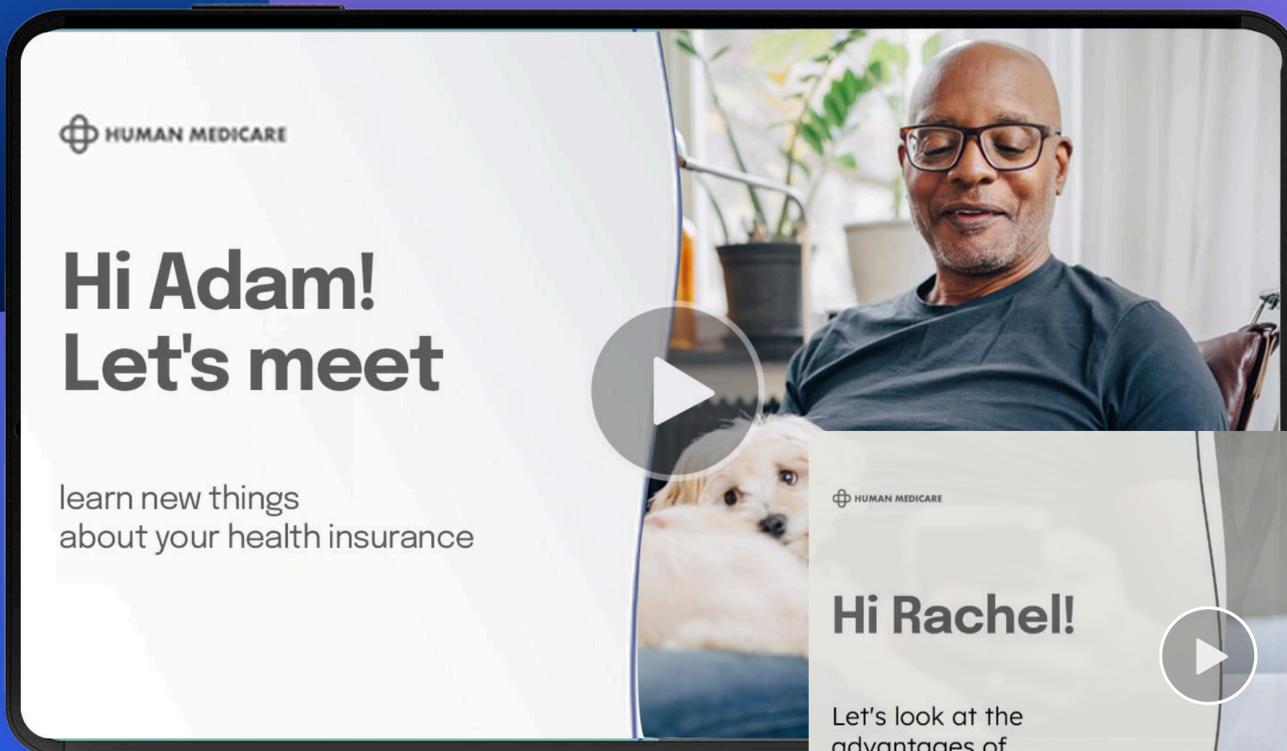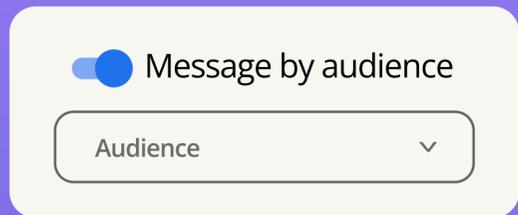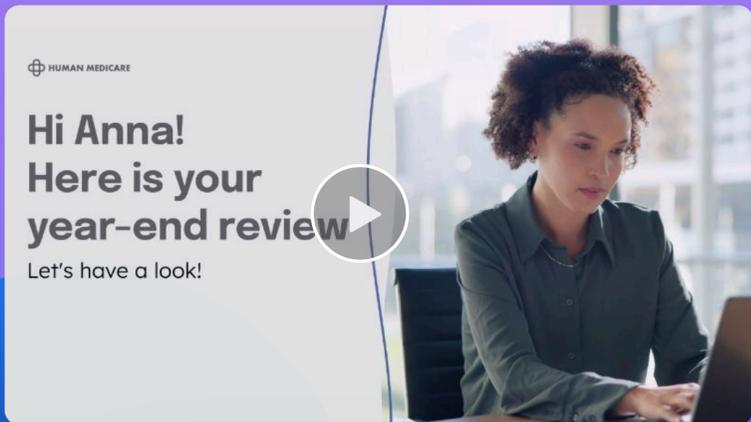# SUNDAYSKY

The complete guide to video personalization

How leading brands build connection, relevance, and results at scale

The power of being known

We all know what it feels like to be recognized. When someone remembers your name, your preferences, or that detail you mentioned the last time you spoke. It's a small gesture, but it leaves a lasting impression. That's the essence of meaningful personalization. It's not about algorithms or data sets; it's about the human experience of being seen and understood.

For many enterprise brands, personalization has been a goal and a focus for years. Audiences expect relevance in every interaction, and organizations that still rely on one-size-fits-all content are more likely than ever to fall behind the curve and miss valuable opportunities to connect with people.

But personalization isn't just about sprinkling someone's name into a message. It's about shaping each interaction to feel like it was made for that viewer, grounded in who they are, what they need, and where they are in their journey.

SundaySky has been at the forefront of video personalization for over 14 years, helping enterprises move beyond generic storytelling to create scalable, authentic experiences that feel human, even when they're automated.

That's what this guide is about. Whether you're leading customer experience, marketing, or enterprise communications, this ebook guides you on how to make personalization meaningful with practical frameworks, real-world examples, and a vision for what's next. You'll learn how leading organizations are using video to bring empathy and relevance to every interaction at enterprise scale.

1

Why personalization works:
The science of connection

Why does personalization drive such outsized results when you get it right? At the core, personalization taps into a few well-understood principles of human psychology and behavior.

■ The "that's me" effect

Humans are wired to pay attention to information that seems to be about them - a phenomenon known as the **"cocktail party effect"**—or why content that mirrors your exact situation suddenly feels impossible to ignore.

In digital experiences, that same instant recognition lights up when content:

- Reflects your name, company, or role
- References something you've done (a purchase, a login, a milestone)
- Anticipates your next step or question

That small moment of "that's me" stops passive scrolling and triggers active attention - the first step toward engagement, understanding, and ultimately, action.

Hi Sharon!
We have a special offer for you!

Learn more
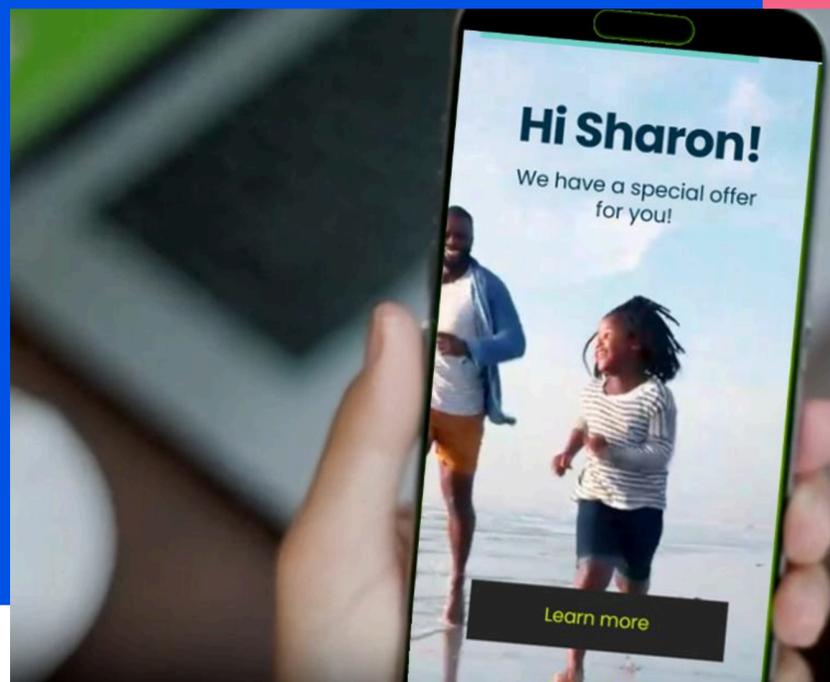
The numbers back this up:

80%

of consumers are more likely to do business with a company that provides personalized experiences (Epsilon).

72%

of consumers say they only engage with marketing messaging that's tailored to them (SmarterHQ).

Personalization can deliver **five to eight times the ROI** on marketing spend and lift sales by

10%

or more (McKinsey).

Customers are **1.8** times more likely to pay a premium

and **3.7** times more likely to purchase more than intended when they feel their experience is personalized (Gartner).

For video specifically, personalization drives up to

3X

higher response rates because they tap into that instant sense of recognition (SundaySky benchmarks).

Personalization doesn't work because of novelty. It works because it aligns with how human attention, memory, and emotion function.

That simple moment of "that's me" turns passive scrolling into active attention: the first step toward engagement and action.

Why personalization drives attention

- 80% more likely to do business with a company that provides personalized experiences 72% only engage with content tailored to them

- 3x higher response rates for personalized video (Include icons for each)

■ Why video wins: Engagement, understanding, and recall

Personalization is powerful in any format, but video has distinct advantages that make it the strongest medium for delivering personalized experiences—especially when the goal is to educate, persuade, or drive action.

■ Video captures and holds attention

Video is processed 60,000x faster by the brain than text and naturally combines motion, sound, and visual cues; elements humans are hardwired to focus on. That's why:

Viewers retain **95%** **of a message** when they watch it in a video, compared to:

10% when reading it in text (Insivia).
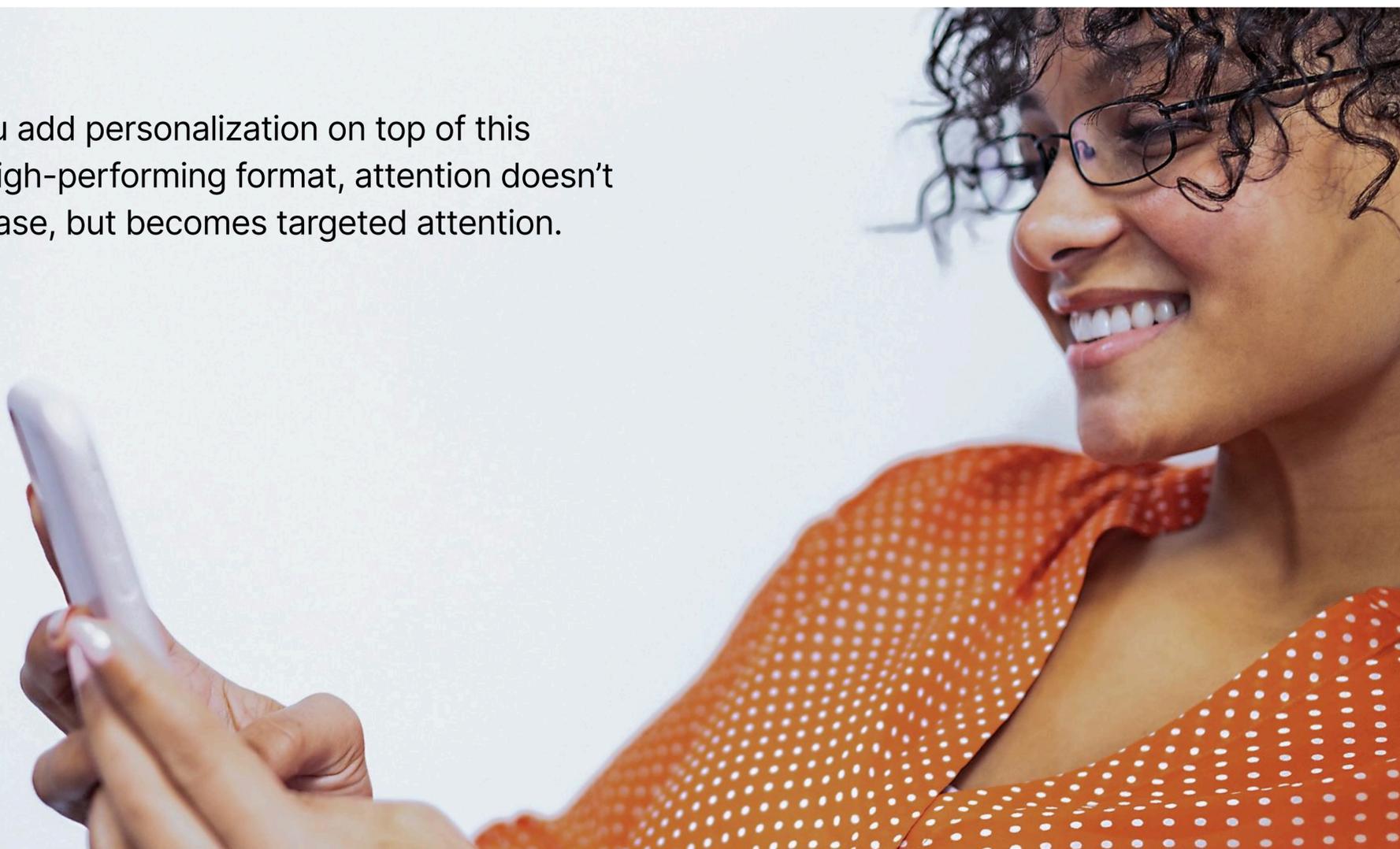
Companies using video in their content mix show a:

66% **higher average website conversion** rate (Aberdeen Group).

Emails with video see:

65% **higher click-through rates** (Campaign Monitor).

When you add personalization on top of this already high-performing format, attention doesn't just increase, but becomes targeted attention.

From relevance to action

Personalization is sometimes regarded as a vanity detail. In practice, it's a powerful performance driver.

When personalization is meaningful, it helps viewers:
- Understand complex information faster
- See the benefit or risk in terms that matter personally to them
- Know the one next step that's most relevant for their situation

That clarity is what drives action: clicking through, activating an account, using a new feature, renewing a subscription, or reaching out for help.

Personalized video amplifies every stage of the journey

Attention
↓
Relevance
↓
Emotion
↓
Clarity
↓
Action
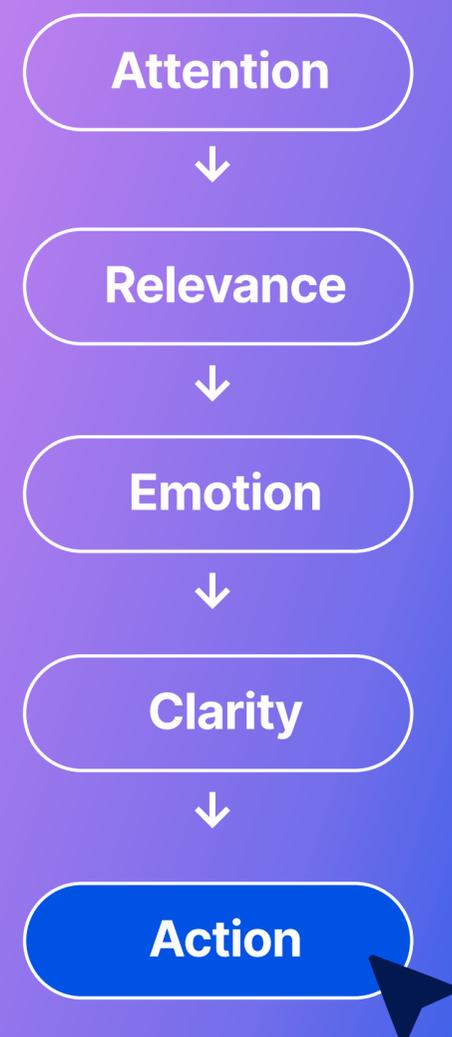
Data-driven vs. perceived personalization

There's an important distinction:

- **Data-driven personalization** is the logic behind the scenes: the variables, decision trees, and triggers that determine what each viewer sees.
- **Perceived personalization** is what the viewer actually feels: "This brand understands me."

A business can have very sophisticated data logic, but that doesn't directly translate into a meaningful viewer experience. For example, using a 'maximum' number of data points but never surfacing anything the customer recognizes as being about them personally. Conversely, just a few well-chosen personalization elements (like role, goal, or current status) can create a strong sentiment of feeling seen.

In this guide, we aim to help you align the two: using data thoughtfully to create experiences that feel simple, human, and meaningful on the other side of the screen.

2

The evolution of video personalization

From simple customization to truly individualized experiences

Personalization has been part of marketing and CX strategy for a long time: names in email subject lines, segmented campaigns, tailored offers, you name it. Video has followed a similar path, except the stakes (and possibilities) are much higher.

Video followed a similar path.

Early days: a few versions for broad segments

Brands first created several variations of a single video: one for new customers, one for renewals, one for specific industries. It was a step up from "one message for everyone," but still limited and difficult to maintain.

Then came basic personalization

Adding a name or small detail to a video felt exciting at first, but it didn't fundamentally change the viewer's experience. The message still wasn't truly about them.

Dynamic storytelling changed everything

As technology evolved, videos could adapt more meaningfully, showing different scenes, benefits, or guidance depending on who was watching. Viewers began to see stories that reflected their actual situation, not just their category.

Today: personalization that feels natural and effortless

Platforms like SundaySky make it possible for every viewer to see a video built for them—informed by their goals, behavior, history, or stage of the journey. With AI assisting behind the scenes, videos update automatically as customer needs evolve.

While video technology has advanced, the purpose hasn't changed: **people respond best when the message feels personal, relevant, and truly supportive.**

◼ SundaySky's perspective: 14+ years on the leading edge

SundaySky has been part of this evolution from the beginning:

- Early work with modular, data-driven video when the concept was still new
- Expansion into large, complex enterprises with millions of customers and constantly shifting data
- Continued innovation around AI generation, templates, and automation to keep personalization both controllable and scalable

This history matters because it shapes a core belief: **personalization should be strategic**, not superficial. It must serve the customer experience and the business, not just look impressive in a demo.

3

What makes an effective personalized video?

We've explored the science behind personalization—why it captures attention, increases understanding, and drives action—now it's time to look at the craft behind it.

Some personalized experiences feel seamless, helpful, and relevant. Others feel superficial or even disjointed. The difference lies in how the experience is built.

Here, we break down the two key structural components that form the anatomy of an effective personalized video: **controlled customization and data-driven storytelling.** These components ensure personalization is not only compelling for the viewer but also manageable and scalable for enterprise teams.

▪ 1:1 control

Personalization that stays true to your brand

1:1 Control ensures every personalized video feels tailored to an individual viewer while still staying consistent with your brand's look, tone, and messaging. Instead of creating custom videos from scratch, teams personalize within a brand-approved structure — so every variation feels polished and intentional.

With 1:1 control, teams can:
- Personalize key details like a viewer's name, plan, or situation
- Adapt messages for specific scenarios without going off-script
- Maintain consistent visuals, tone, and compliance across all videos

Why it matters:

Your brand stays cohesive while every viewer gets an experience that feels uniquely relevant.

What it looks like in action

- Sales: A rep sends a prospecting video that includes the viewer's company name and goals, while keeping the core message consistent.
- CX: A personalized onboarding video reflects a customer's plan type and early progress, but uses the same trusted brand voice.
- Marketing: Renewal videos adapt CTAs and benefits based on individual account details, without altering approved messaging.

■ Data-driven at scale

Every viewer gets the message that fits them best

Data-driven personalization ensures each person sees the variation of the story that's most relevant to them—automatically. Instead of manually creating multiple versions, the system uses existing customer data to tailor scenes, messages, and recommendations.

With data-driven personalization, you can:

- Highlight the information each viewer cares about most
- Show different scenes based on behaviors or lifecycle stage
- Present clear next steps that make sense for each individual

Why it matters:

You deliver a personalized experience for a broad audience without extra production work—and viewers only see what truly applies to them.

What it looks like in action

- **SaaS:** New users get onboarding videos that show different feature walk-throughs depending on what they have (or haven't) tried yet.
- **Financial services:** Members see renewal options or recommendations based on their actual usage and account profile.
- **Retail:** Loyalty members receive personalized offers or reward highlights based on their purchase history.

Building blocks of personalized video

Simple ingredients that unlock powerful personalization

While every organization has different goals and customer journeys, the most effective personalized videos tend to share a few common ingredients. Here, we highlight key elements that help personalization feel natural, helpful, and relevant.

The best part? With a platform like SundaySky, most of these elements come together automatically behind the scenes.

1. A clear moment in the customer journey

Personalized video works best when it's tied to a meaningful moment: a welcome, a renewal, a milestone, a change, or a question your customer is likely to have. When the moment matters, personalization matters even more.

What this looks like:

- A new customer's first 30 days
- A member reviewing upcoming benefits
- A customer hitting a usage milestone
- A renewal approaching
- A prospect receiving a recap or recommendation

julep

Hi Lilly, Dash away with holiday deals

25% discount on Tech & gaming

Order now
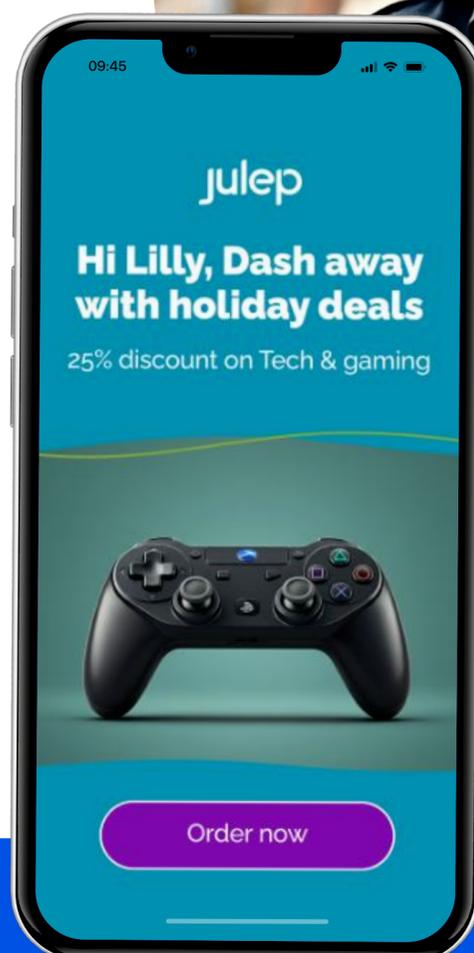
2. A story that adapts to the viewer

Great personalized videos feel like the story was built just for that person. All it takes is a flexible story framework where the right details adjust for each viewer.

What this looks like:

- Highlighting different features for different users
- Adjusting messaging by lifecycle stage
- Showing real progress or results
- Tailoring a recommendation or next step

These subtle shifts make a big difference in how a message lands.

3. Personal details that add clarity, not clutter

Good personalization isn't about using every data point available. Even a few well-chosen details can transform a generic message into one that feels supportive and relevant.

Examples:

- Their plan or product type
- Their recent activity or usage
- A personal milestone they reached
- A recommendation based on what they've done

These details help customers understand where they stand and what comes next.
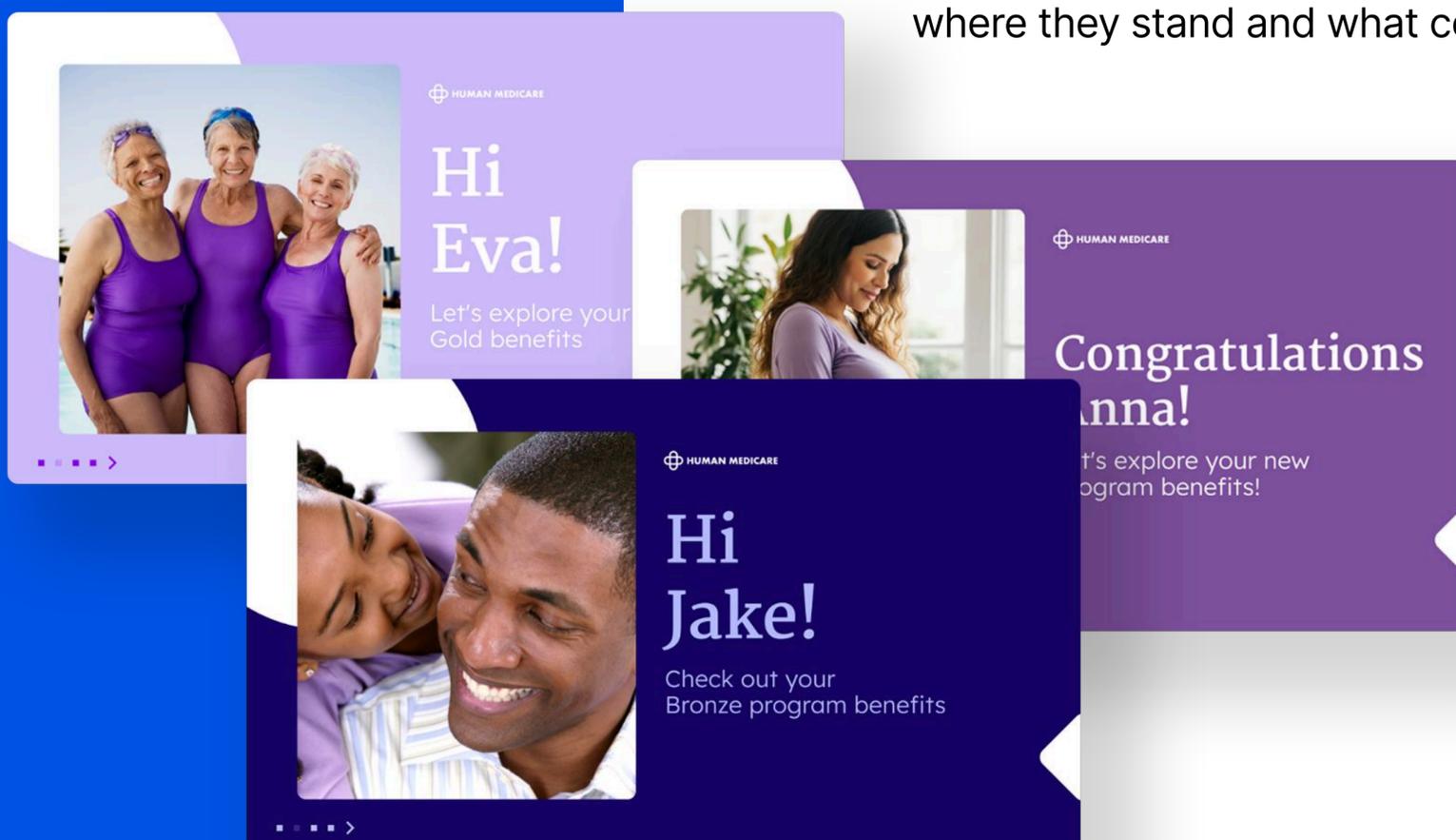
4. A helpful, context-specific next step

Every personalized video should make it easy for viewers to know what to do next; not with a generic CTA, but with a step that fits their situation.

For example:

- "Set up your first campaign"
- "Book time with your advisor"
- "Add a dependent to your plan"
- "Try this feature you haven't explored yet"

Personalization turns the CTA into guidance rather than a pitch.

"Before you personalize, ask these three questions"

These three questions help teams identify where personalization will have the biggest impact and why it matters:

What does the customer need to know at this moment?

- What information will reduce confusion?
- What context do they lack?
- What details matter most right now?

What do we want the customer to feel at this moment?

- Confident? Informed? Supported?
- Reassured about a decision?
- Motivated to take the next step?

What does the customer need to do next?

- Activate a feature?
- Upgrade or renew?
- Complete a form?
- Book a meeting?

5. A system that brings it all together automatically

This is the part most organizations worry about, but shouldn't. With solutions like SundaySky, the "heavy lifting" (data, personalization rules, video assembly, scaling, updating) happens automatically, so teams can focus on the story over video mechanics.

Why this matters:

- No manual editing
- No complex setup
- No huge lift from creative or engineering
- Easy for any team to use
- Scalability without effort

Personalization becomes something you turn on, not something you build from scratch.

Easy ways to elevate personalized video

- Start with a strong, friendly welcome
- Spotlight the details viewers care about most
- Keep the pace lively and the story concise
- Use a CTA that genuinely helps the viewer
- Refresh videos occasionally to stay current

Heading

Message by audience

Welcome {First name}

B *I*

Fallback

Hi there!

Google Sheets

salesforce

Marketo

HUMAN MEDICARE

Welcome Maria!

Thanks for being a Human Medicare member

Simple shifts can make personalized video feel even more human and engaging.

5

Real-world success stories by industry

Personalized video becomes most powerful when applied to real business challenges. Here, we highlight how organizations across industries can use SundaySky to improve clarity, accelerate action, and create experiences that feel unmistakably human.

Tech & SaaS: Customer onboarding that feels personal

■ **The problem**

Tech and SaaS companies often struggle with a familiar challenge: new customers sign up but don't fully adopt the product. Early confusion or lack of momentum can lead to slow time-to-value, unnecessary support demand, and weaker long-term retention.

- Highlight key features most relevant to the customer's goals or business profile
- Reinforce early wins with dynamic progress snapshots
- Deliver tailored CTAs such as "Create your first campaign," "Connect your data," or "Schedule your onboarding session"

■ **The personalization approach**

Tech teams use personalized video to guide each customer through the exact steps most relevant to their role, plan, and usage. Using SundaySky, these companies can:

- Welcome new customers by name and acknowledge their specific plan or onboarding stage
- Surface personalized next steps based on what the customer has (or hasn't) completed

■ Examples in action

Constant Contact used personalized onboarding videos to guide new customers through account setup and early feature adoption. The videos adjusted dynamically based on the plan the customer had chosen and their first actions in the product.

➡️ Read & watch the story

ZoomInfo uses personalized video across key lifecycle touchpoints—from onboarding to customer education—to accelerate adoption and help customers get more value from their investment.

➡️ Reference: https://sundaysky.com/blog/forrester-cx-summit-zoominfo-personalized-video/

■ The outcomes

Across tech customers, personalized videos have led to:
- Faster activation and time-to-value
- Higher adoption of key features
- Reduced early-lifecycle friction and support demand
- A more human, reassuring start to the customer relationship

Financial services: Building trust in complex journeys

■ **The problem**

Financial products can be complex: different rates, terms, eligibility rules, and financial decisions that customers must weigh carefully. Many customers feel overwhelmed by dense documentation or impersonal renewal communications, leading to confusion, delays, or disengagement.

RED CROWN CREDIT UNION

■ **Example in action:**

Red Crown Credit Union

Red Crown Credit Union used personalized video to deepen relationships with members by delivering content tailored to each individual's financial situation. Whether explaining credit union membership, products, or next steps, videos helped members feel understood and supported.

➡️ Read the story

■ **The personalization approach**

Financial institutions use personalized video to simplify these moments and build trust. With SundaySky, they can create videos that:

- Summarize each customer's current account or loan in plain language
- Explain options (renewal, refinance, upgrade) based on that customer's real data
- Visualize potential outcomes using personalized numbers and scenarios
- Guide customers toward the right decision with context-specific CTAs

Savings Account

Every member has one. Start saving today!

Federally Insured by NCUA

■ **Why personalized video made the difference**

- Visuals transformed complex numbers into clear explanations
- Members could rewatch and share the information with family

Trust increased because the video reflected their financial situation, not a generic pitch

■ **Outcomes**

- Higher engagement with financial guidance
- Increased clarity around options and benefits
- Fewer "I don't understand this" support calls
- More confident, informed decision-making

Insurance & healthcare: Clarity and confidence for every member

■ **The problem**

Whether it's health benefits, insurance coverage, or annual renewals, customers often struggle to understand complicated policies, networks, costs, or next steps. This confusion leads to under-utilization, unnecessary support calls, and frustration at key moments.

Behavioral Health Solutions

Care and resources designed with health in mind

■ **The personalization approach**

Insurance and healthcare organizations use personalized video to break down complexity with clarity and empathy. With SundaySky, these companies can create videos that:

- Welcome each member by name and confirm their specific plan or coverage
- Explain benefits most relevant to that individual (e.g., in-network providers, preventive care, telehealth, deductible details)
- Walk through estimated costs and coverage using real examples
- Clarify next steps such as choosing a primary care provider, registering for a portal, or completing forms
- Reinforce support options tailored to that member's needs

■ **SundaySky customer examples**

USI uses personalized video to engage prospects and customers across commercial insurance, employee benefits, and retirement solutions. By tailoring videos to the viewer's industry, role, or area of interest, USI makes complex offerings easier to understand while maintaining a consistent, high-quality brand experience at scale.

UnitedHealthcare uses personalized video to help members better understand their health plans and next steps. By adapting content to each individual's coverage and situation, these videos make healthcare information clearer, more approachable, and easier to act on.

➡ View customer story

Why personalized video works in insurance and healthcare

Insurance and healthcare are complex by nature—multiple plans, stakeholders, rules, and decisions that deeply impact the individual. Effective communications are key at moments like onboarding, renewal, or change.

For organizations like USI and UnitedHealthcare, personalization helps:

- Build trust earlier in the relationship
- Make complex information feel more approachable
- Reduce confusion and follow-up questions
- Support better, more confident decision-making

The impact

Organizations typically see:

- Increased understanding of benefits and coverage
- Better use of in-network and preventive resources
- Lower support volume for common questions
- Higher satisfaction during onboarding and renewal periods
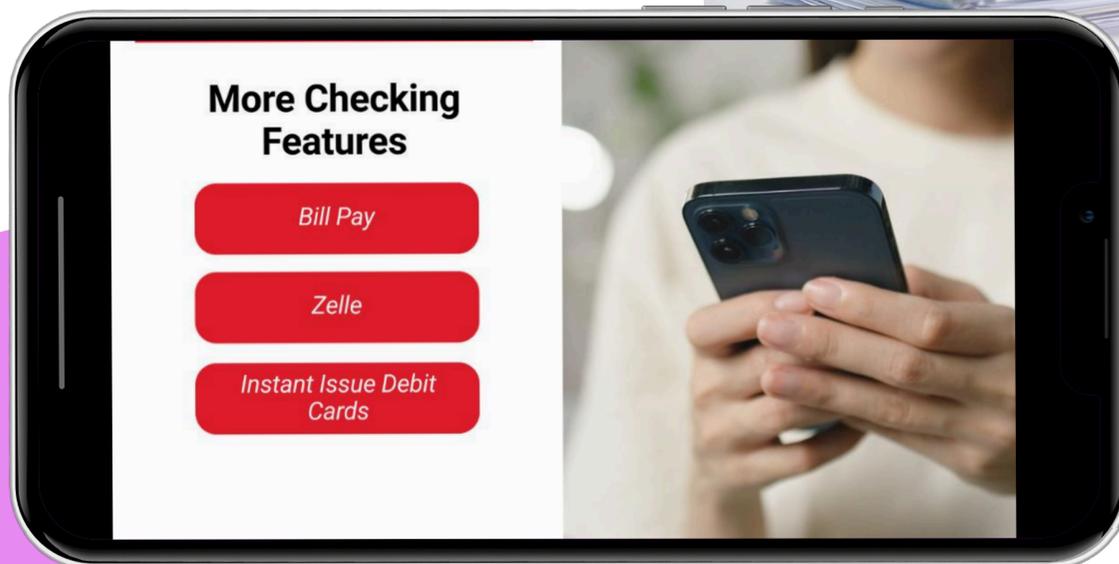
Conclusion: Every viewer, one story

Personalization has been a buzzword for years, but its heart is simple: people want to feel known, respected, and supported. When you use video personalization meaningfully, every viewer sees a story that feels like it was made for them, because it was.

You've seen why personalization works, how it's evolved, what it takes to do it well, and where AI is taking it next. The opportunity now is to apply these principles to the moments that matter most in your own customer journeys.

SundaySky is here to help you do exactly that with technology, expertise, and a philosophy rooted in empathy at scale.

SUNDAYSKY

Talk to our team

Book a demo

Ready to show every customer they're seen?

HUMAN MEDICARE

Welcome Eva!

Thanks for being a Human Medicare member