

Salesforce Personalization Implementation

How to implement Salesforce Personalization: Data 360 first, then event capture, recommenders and Personalization Points, testing, latency and the MCP+ path.

Type **Resource** Topic **Whitepaper** Reading time **7 min** Updated **20 Oct 2026**

Author **GeekMidst Team** Reviewed by **Site owner**

Salesforce now offers two personalization products, built on different architectures. This guide covers implementing **Salesforce Personalization**, the newer product built natively on the Salesforce Platform and Data 360, and explains where **Marketing Cloud Personalization** and the **MCP+** licence fit. It works through the Data 360 prerequisite, event capture, decisioning, testing and what "real-time" actually means in Salesforce's documentation.

WHITEPAPER

Implementing Salesforce Personalization in six steps



1 Confirm licensing
Salesforce Personalization, MCP+ or add-on; Data 360 provisioned

4 Configure decisioning
Recommenders, Content Schemas and Personalization Points

2 Build the Data 360 foundation
Streams, DMOs, identity resolution, profile and item data graphs

5 Test and experiment
Simulator, fallbacks and consent paths, then a controlled launch

3 Deploy capture
Salesforce Interactions SDK, sitemap and consent integration

6 Extend channels
Email, mobile and batch, reusing the same decision logic

Objective-based recommenders need at least three recorded engagement activities. No public GA date was found.

The Data 360 foundation comes first and usually takes longest; decisioning starts with one or two placements and is proven with a controlled experiment. [View full size](#)

1. Which product are you implementing?

Salesforce Personalization, MCP and MCP+

Point	Salesforce Personalization	Marketing Cloud Personalization (MCP)	MCP+
What it is	Next-generation product, native on the Salesforce Platform, powered by Agentforce and Data 360	Standalone real-time interaction management platform, formerly Interaction Studio and Evergage	Salesforce Personalization plus full MCP functionality
Salesforce's positioning	"The recommended path forward" for new customers	Works independently of other Salesforce products	Path for existing MCP customers
Data 360	Must be provisioned	Not stated; MCP works independently of other Salesforce products	Must be provisioned
Capture code	Salesforce Interactions SDK with the SalesforceInteractions namespace	Beacon and Sitemap; existing customers can keep the Evergage namespace	Both SDKs can run side by side on one site

Both the Salesforce Personalization and MCP+ SKUs are priced per org per month, billed annually, and include an allotment of personalization credits. Salesforce says existing MCP customers can get Salesforce Personalization by renewing or swapping to MCP+, "at no additional cost through the MCP+ SKU". For Marketing Cloud Next customers, Salesforce

Personalization is offered as an add-on for Growth and Advanced Edition. Confirm what your contract includes with your account team.

No public GA date for Salesforce Personalization was found. It is sold on Salesforce's pricing page, so treat it as available, but check Salesforce Help for the current state of any feature you depend on.

2. The Data 360 prerequisite

Salesforce Personalization reads its data from Data 360, so the Data 360 work comes first and usually takes the longest. CRM data reaches Personalization through Data 360: data streams, then DMOs, then data graphs.

Data 360 objects Personalization needs

Object	What it holds	Needed for
Profile Data Graph	Purchase and browse history, affinities and segment membership	Reading the visitor's profile at decision time
Item Data Graph	The product or content catalog	Recommending items
Real-Time Profile Data Graph	Engagement history with real-time updates	Objective-based recommenders
Mapped catalog	Products or content mapped into Data 360	All recommendations

If your Data 360 foundation is not yet in place, start with the [Data 360 architecture guide](#) and [real-time identity resolution and data graphs](#).

3. Event capture

On the web, Salesforce Personalization uses the **Salesforce Interactions SDK**, which Salesforce describes as "a single SDK to integrate with either Data 360, Personalization, or both together". Events are sent with `sendEvent`, and a sitemap maps the objects on your site, such as product pages and categories, to events.

Consent is built in. Salesforce states that the SDK sends events only if a customer has consented to tracking, and stops at once when consent is revoked. That means your consent banner and the SDK must be wired together, and your test plan must include visitors who decline.

For apps, Salesforce lists a Unified SDK for web, iOS and Android. In the Unified Mobile Engagement SDK, Marketing Cloud Advanced Edition users use the Mobile App Messaging module.

Event capture checklist

- Every page type that matters is mapped in the sitemap.
- Product and content IDs in events match the IDs in the Item Data Graph.
- Consent states are tested: accepted, declined and revoked mid-session.
- Logged-in visitors pass an identifier that identity resolution can match.
- If MCP is already on the site, the two SDKs are tested side by side.

4. Decisioning

Decisioning is where Personalization chooses what each visitor sees. It has three building blocks.

Recommenders

Recommender types

Type	How it works	Requirements
Rule-based	Sorts items by criteria or by calculated insights such as top sellers	No training needed
Objective-based	Deep-learning model that optimises for a goal such as revenue or clicks	A Real-Time Profile Data Graph with engagement history, and at least three recorded engagement activities for initial training

Both types support filters and a Recommender Simulator, which lets you check results before going live. Visitors with no history get a fallback, such as top sellers, so define the fallback deliberately rather than accepting a default.

Personalization Points

A **Personalization Point** combines a recommender strategy, a **Content Schema** (formerly Response Templates) and optional targeting. Salesforce states that each one "needs either an experiment or one or more Decisions". The design principle is "build the logic once, deploy it everywhere": the same logic can serve web, mobile, email and batch.

Channels

- **Marketing Cloud Advanced email:** the recommender acts as a data source, with a server-side call per recipient at send time.
- **Marketing Cloud Engagement:** Batch Personalizations generate decisions in bulk for a Data 360 segment and activate them to Engagement for outbound sends.

On the agentic side, Salesforce's pricing page lists "Agentforce Personalization Decisioning", while the product page describes "Agentforce Actions" and a "Get User Intent" action that feeds the decisioning engine. The naming is inconsistent between the two pages, so check current documentation before designing around either.

5. Latency: what "real-time" means

Salesforce's marketing pages describe a "Real-time Personalization Engine" but give no latency figures. The documentation is more specific, and the answer depends on the data path.

Latency facts from Salesforce documentation

Path	What Salesforce states
Data 360 real-time layer	95% of events complete ingestion to real-time activation within about 500 ms under the Sub-Second Real-Time Profile; performance can vary; no beta or GA label given
Real-time data graphs	Required for real-time identity resolution, calculated insights, segments and data actions, each described as working "in milliseconds"
Standard web or mobile stream into DLOs	Engagement data every 15 minutes, profile data every hour

- i In-session personalization depends on the real-time layer and real-time data graphs. Data that arrives through the standard stream path will lag by up to an hour, so map each use case to the path it needs.

6. Testing

Salesforce Personalization supports A/B and multivariate tests across web experiences and journeys, with automatic cohort assignment and the winner surfaced. Use them, and add your own checks:

Testing a Personalization rollout

1 Check capture

Confirm events arrive in Data 360 with the right IDs, for consented visitors only.

2 Simulate recommenders

Use the Recommender Simulator to check results for known profiles and for new visitors.

3 Test fallbacks

Confirm what visitors with no history, or with tracking declined, see.

4 Check rendering

Test each Personalization Point on every page type and device you support.

5 Measure latency

Time how long a new event takes to change what a visitor sees, against the path you designed for.

6 Run an experiment

Launch with a controlled experiment so the uplift is measured, not assumed.

7. Implementation plan

1. **Confirm licensing:** Salesforce Personalization, MCP+ or an add-on to Marketing Cloud Next, with Data 360 provisioned.
2. **Build the Data 360 foundation:** streams, DMOs, identity resolution and the profile and item data graphs.
3. **Deploy capture:** Salesforce Interactions SDK, sitemap and consent integration.

4. **Configure decisioning:** recommenders, Content Schemas and Personalization Points, starting with one or two high-value placements.
5. **Test and experiment:** the steps above, then a controlled launch.
6. **Extend channels:** email, mobile and batch, reusing the same decision logic.

For existing MCP customers

You do not have to switch at once. The two web SDKs can run side by side, and MCP+ keeps your current MCP implementation while adding Salesforce Personalization. A sensible path is to keep proven MCP campaigns running, build the Data 360 foundation, and move placements one by one, measuring each. See [real-time personalization engine vs platform](#) for the trade-offs.

Questions we hear

Is Salesforce Personalization the same as Marketing Cloud Personalization?

Can we start without Data 360?

Why are objective-based recommenders not working for new visitors?

What happens when a visitor declines tracking?

Related reading

Salesforce personalization consulting

How we scope and deliver personalization



Salesforce real-time personalization

The solution blueprint



What is real-time personalization?

The concepts behind the product



Sources

- <https://www.salesforce.com/marketing/personalization/pricing/?africa=1>
- <https://www.salesforce.com/marketing/personalization/?bc=DB>
- <https://developer.salesforce.com/docs/data/salesforce-interactions-sdk/guide/c360a-api-salesforce-interactions-web-sdk.html>
- <https://trailhead.salesforce.com/content/learn/modules/salesforce-personalization-recommenders-with-agentforce-marketing/explore-salesforce-recommenders>
- <https://developer.salesforce.com/docs/data/data-cloud-ref/guide/c360a-real-time-ingestion-api.htm>

More on Marketing Cloud Engagement

[Salesforce Marketing Cloud Consulting](#)[Salesforce Personalization Consulting](#)[Abandoned Cart Recovery Blueprint](#)[Consent Synchronisation Across CRM and Marketing](#)[CRM to Marketing Cloud Data Synchronisation](#)[Event Registration and Reminder Journey](#)

Keep reading

[Free resource](#)

Data 360 Architecture Guide

Whitepaper

geekmidst.com

In this article

- 01 Download the whitepaper
- 02 1. The architecture in one view
- 03 Data 360 layers
- 04 2. Ingestion
- 05 Ingestion paths and timing
- 06 3. From DLO to DMO

Resource Whitepaper 7 min read

Data 360 Architecture Guide: From Ingestion to Activation

How Data 360 fits together, layer by layer: ingestion, DLOs and DMOs, identity resolution, calculated insights, activation, zero copy status and consent.

[Read more →](#)[Free resource](#)

CRM Implementation Whitepaper

Whitepaper

geekmidst.com

In this article

- 01 Download the whitepaper
- 02 1. Start with outcomes, not features
- 03 2. The six phases
- 04 Implementation phases
- 05 3. Governance that holds up
- 06 Core roles

Resource Whitepaper 7 min read

CRM Implementation Whitepaper: Phases, Governance and Risk

A practical whitepaper on Salesforce CRM implementation: six delivery phases, governance that holds up, data migration, adoption and the platform risks to plan...

[Read more →](#)[Free resource](#)

Salesforce Integration Whitepaper

Whitepaper

geekmidst.com

In this article

- 01 Download the whitepaper
- 02 1. Start with the business event
- 03 2. Integration patterns
- 04 Choosing a pattern
- 05 3. Layered API design
- 06 Three API layers

Resource Whitepaper 7 min read

Salesforce Integration Whitepaper: Patterns, Security, Testing

A practical whitepaper on Salesforce integration: choosing patterns, layered API design, error handling

and monitoring, the 2026-27 security changes, and testi...

[Read more](#) →

Tell us what you are trying to fix.

Share your Salesforce setup, goals and constraints. A practitioner reads every message and replies with questions, first thoughts or an honest view of whether you need outside help at all.

[Talk to a Salesforce Expert](#) →

info@geekmidst.com

Email us the details

[+91 89713 50255](tel:+918971350255)

Call during India business hours

[WhatsApp](#)

Send a quick message