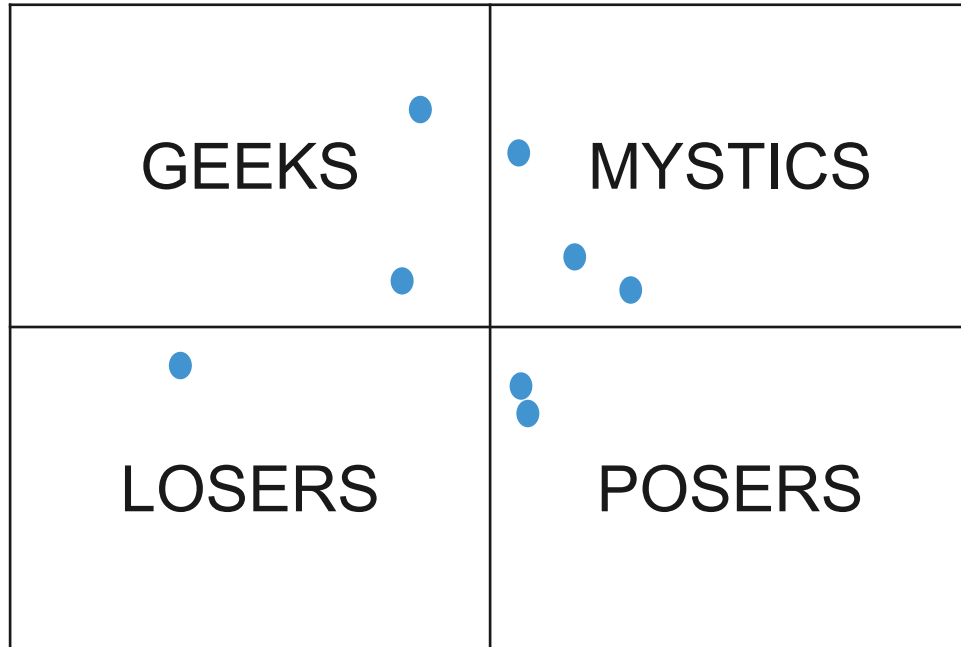




# Selecting the Right Customer Data Platform

Copyright - December, 2023

## A Different Kind of Analyst Firm...



“the mystical quadrant”

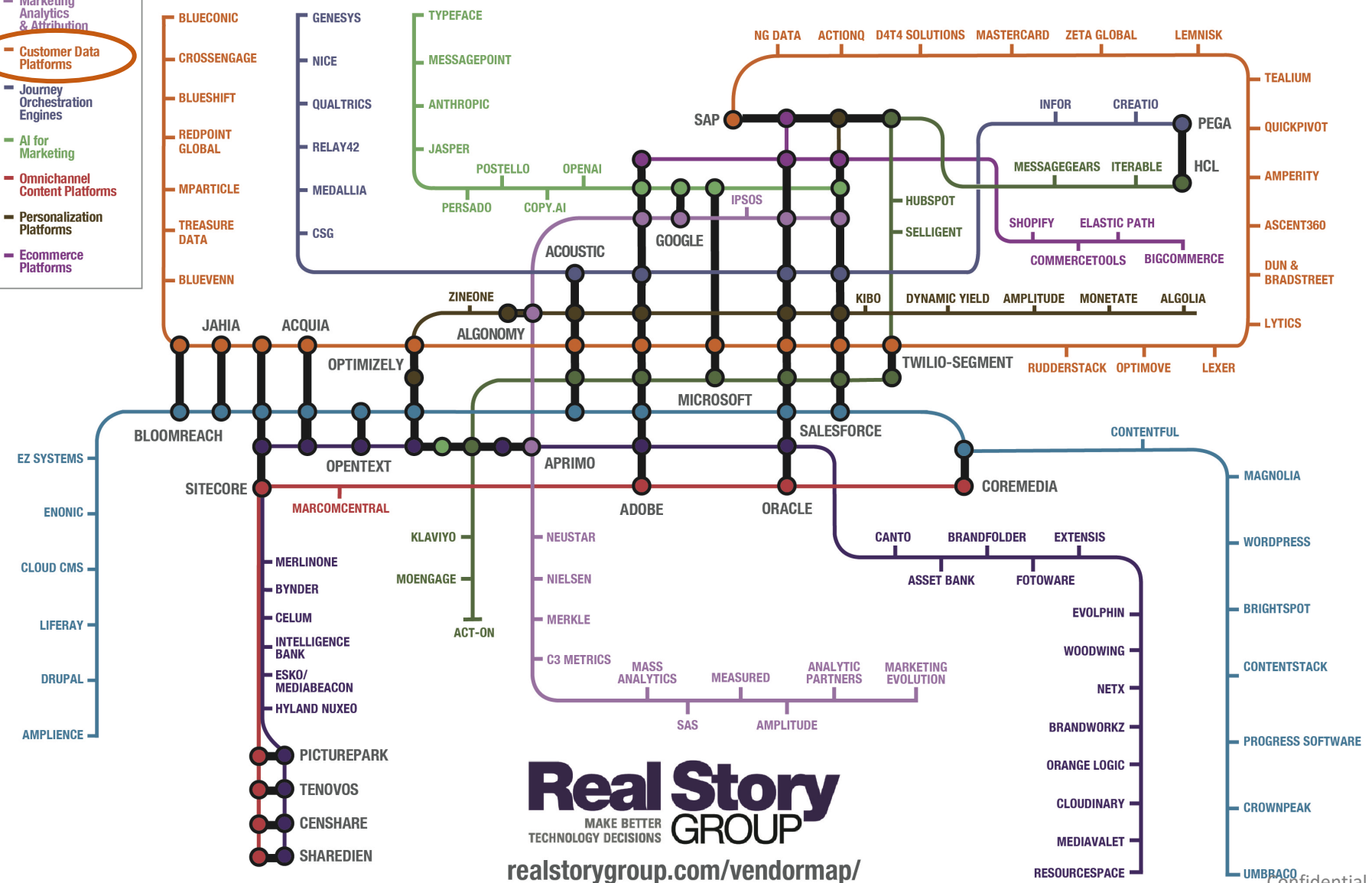
INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	<b>NO</b>	<b>YES</b>
SPEAK AT VENDOR EVENTS?	<b>NO</b>	<b>YES</b>
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	<b>NO</b>	<b>YES</b>
WRITE PAPERS FOR VENDORS?	<b>NO</b>	<b>YES</b>

# MARTECH STACK VENDOR MAP

Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

Take a test ride—download a sample today: [www.realstorygroup.com/try](http://www.realstorygroup.com/try)

- KEY**
- Web Content & Experience Management
  - Digital Asset Management
  - Outbound Marketing Platforms
  - Marketing Analytics & Attribution
  - **Customer Data Platforms**
  - Journey Orchestration Engines
  - AI for Marketing
  - Omnichannel Content Platforms
  - Personalization Platforms
  - Ecommerce Platforms



**Real Story GROUP**  
 MAKE BETTER TECHNOLOGY DECISIONS  
[realstorygroup.com/vendormap/](http://realstorygroup.com/vendormap/)

# Agenda

**Shifting Architectures**

**CDP Marketplace**

**The Right Way to Select a CDP**

**Key Take-Aways**

# Traditional CDP Model

## FIRST / ZERO PARTY CUSTOMER DATA

- Profile
- Mobile Activity
- Customer Survey
- Product Interaction
- CRM Records
- Social Activity
- Web Activity
- Event Data
- E-Commerce
- Email Activity

## SECOND & THIRD PARTY DATA

- Statistics
- Income
- Occupation
- Ad Data
- Firmographics
- Demographics
- Data Exchange
- Weather
- Interest / Intent
- Geography / Location

## CUSTOMER DATA PLATFORM SERVICES

- Identity Resolution
- Data Cleaning / ETL
- Data Enrichment
- Relationship Graphing
- Segmentation
- Event Handling
- Rules Activation
- Reporting/Analytics
- Customer API
- Other....

## OMNICHANNEL ENGAGEMENT

- Social
- Messaging
- Voice
- CRM
- Site Personalization
- Customized Emails
- Ecommerce
- Call Center

## TARGETED ADVERTISING



## LOCALIZED ANALYTICS

- Predictive Modeling
- Statistics
- Dashboard & Visualizations

# Emerging Large Enterprise Model

## FIRST / ZERO PARTY CUSTOMER DATA

- Profile
- Mobile Activity
- Customer
- Product Interaction
- CRM Records
- Social Activity
- Web Activity
- Event Data
- E-Commerce
- Email Activity

## SECOND & THIRD PARTY DATA

- Statistics
- Income
- Occupation
- Ad Data
- Firmographics
- Demographics
- Data Exchange
- Weather
- Interest / Intent
- Location

### CUSTOMER DATA PROCESSING

- Ingest
- Transform
- Clean
- Process
- Unify
- Enrich
- Comply
- Graph
- Rules
- Other...

Process Hub

### CUSTOMER DATA ACTIVATION

- Customer API
- Segment
- Event Handling
- Activate
- (Calculate)
- (Personalize)
- (Orchestrate)
- (Test)
- Other...

Activation Hub

## OMNICHANNEL ENGAGEMENT

- Social
- Messaging
- Voice
- CRM
- Site Personalizat'n
- Customized Emails
- Ecommerce
- Call Center

## TARGETED ADVERTISING



## ENTERPRISE ANALYTICS

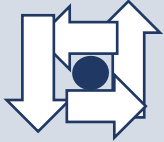
- Predictive Modeling
- Statistics
- Dashboard & Visualizations

# What does a CDP do (for you)?

## Customer Data Ecosystem

### Enterprise Data Fabric

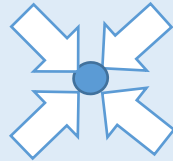
#### Core Data Services



Ingestion  
Cleaning  
Aggregating  
Processing  
Quality  
Analytics  
Modeling / Predictions

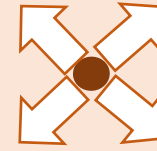
IT & Data Ops

#### Customer Data Hub



**Unification** / ID Resolution  
Data Enrichment  
Stewardship / Governance  
Compliance / Consent  
API / Queue / Pipeline  
Reporting

#### Customer Data Activation



Real-time  
Processing Lite  
**Segmentation**  
Activation  
Event Triggering  
Analytics / Models Lite

Marketing / CX Ops

## Customer Engagement

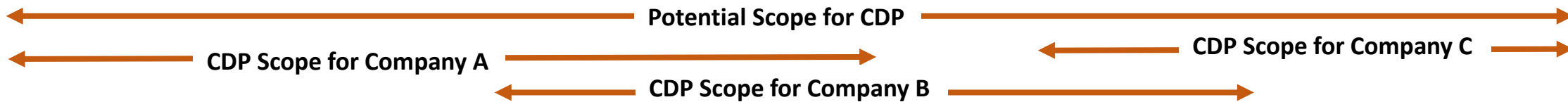


### Advertising

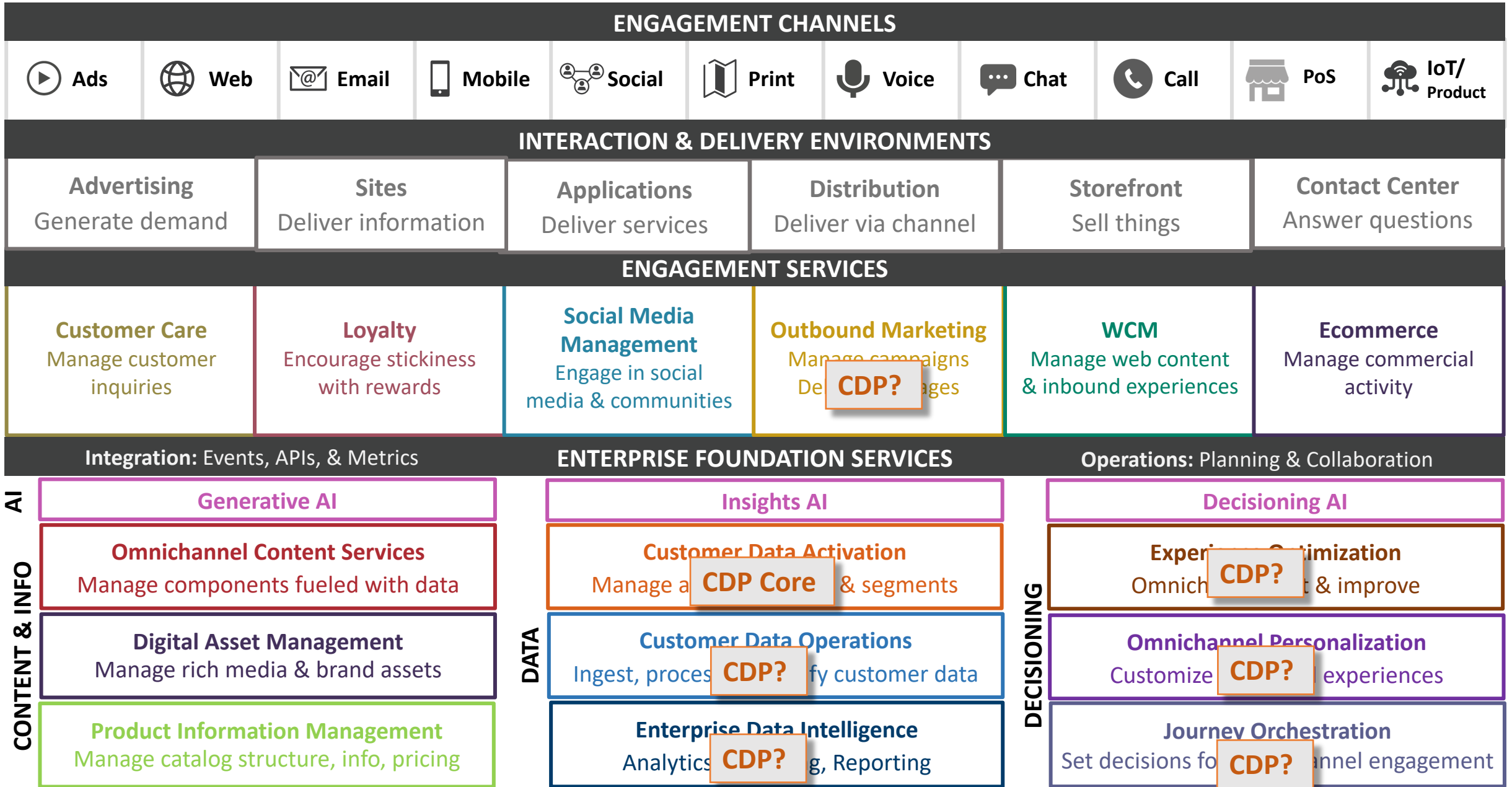
Ecommerce  
Chat / Bots  
Call Centers  
Web Sites & Apps  
Mobile Apps

Email / Outbound  
Personalization  
Recommendations

Marketing & CX



# MarTech Services Reference Model: B2C





# Agenda

**Shifting Architectures**

**CDP Marketplace**

**The Right Way to Select a CDP**

**Key Take-Aways**


# CDP Marketplace, Circa 2024

INDEPENDENTS

**Processing-Oriented Independents**

TREASURE DATA  
Amperity &  
  
mparticle  
Ascent  
celebrus

**Activation-Oriented Independents**

session  lemnisk™  
blueshift CrossEngage  
QuickPivot ALGONOMY  
TEALIUM Segment  
hightouch rudderstack

**Decisioning-Oriented Independents**

Lytics blueconic  
ACTIONIQ BlueVenn  
NG DATA optimove  
dun & bradstreet  
SYNCARI Leadspace  
terminus

SUITES

**MarTech - Processing**

ORACLE SAP

**MarTech – Activation Oriented**

salesforce ACQUIA acoustic Microsoft Adobe

PROCESSING

LEVERAGE

# Agenda

**Shifting Architectures**

**CDP Marketplace**

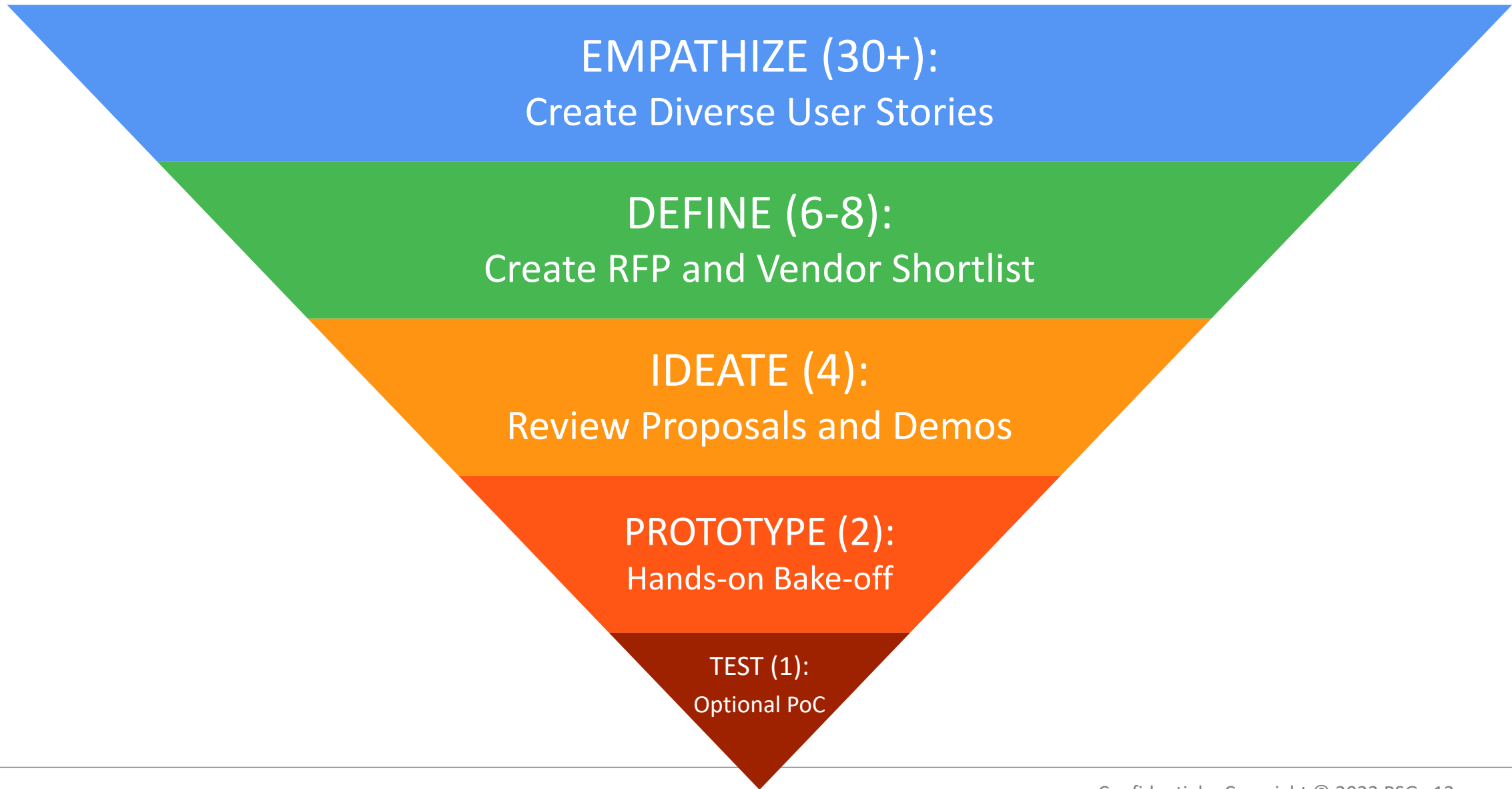
**The Right Way to Select a CDP**

**Key Take-Aways**

Term of the Day....

**“Design-Thinking”**  
**Business-focused**  
**Team-based**  
**Empirical**  
**Iterative**  
**Adaptive**





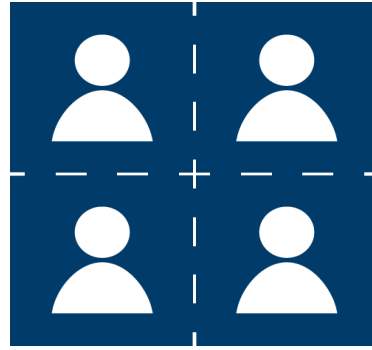
# Ten Potential CDP Business Use Case Categories



Advanced Customer Data Management



Predictive Analytics



Outbound Marketing Campaign Support



Online Personalization & Experience Optimization



Ecommerce Recommendations & Optimization



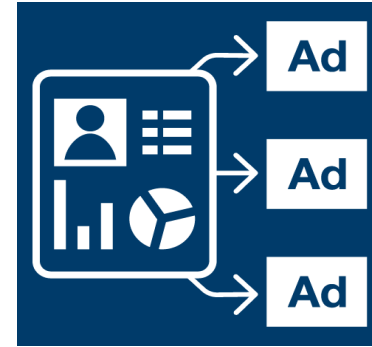
Omnichannel & Offline Aggregation



Realtime Behavioral Analysis



Household / Channel Marketing



Paid Media Support

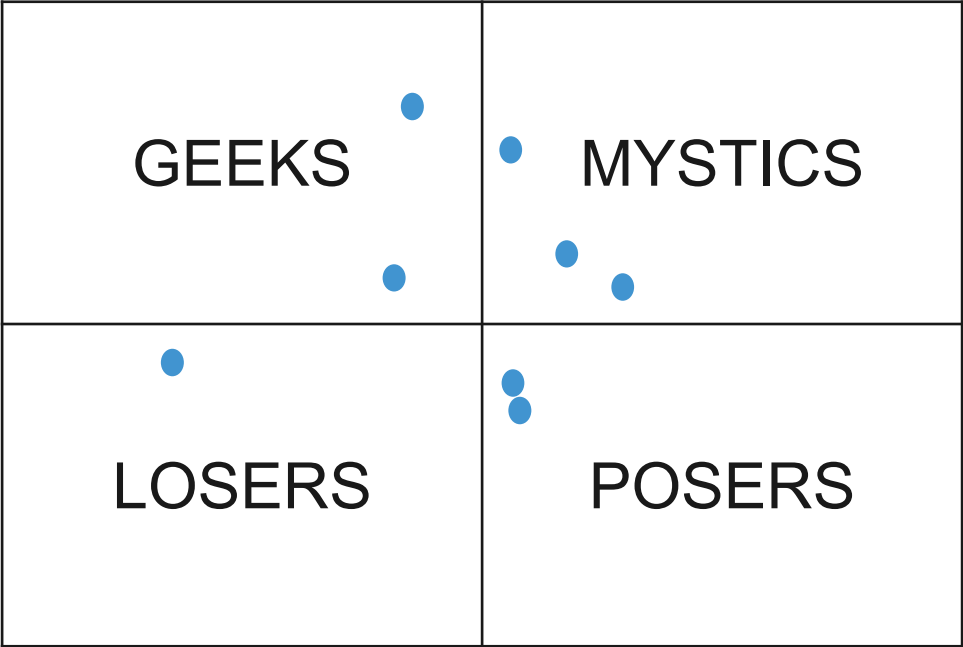


Loyalty & Rewards Management

## Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Do you want the CDP platform to **support** or **execute**?

Don't be mystical...



...Mystical

**RealQuadrant™**  
SHORTLIST GENERATOR

Get the right vendor Short List based on your unique requirements.

Customize criteria and scenarios, generate a custom quadrant, and obtain detailed pros and cons for each vendor. *Work with us to find the right tools for your business.*

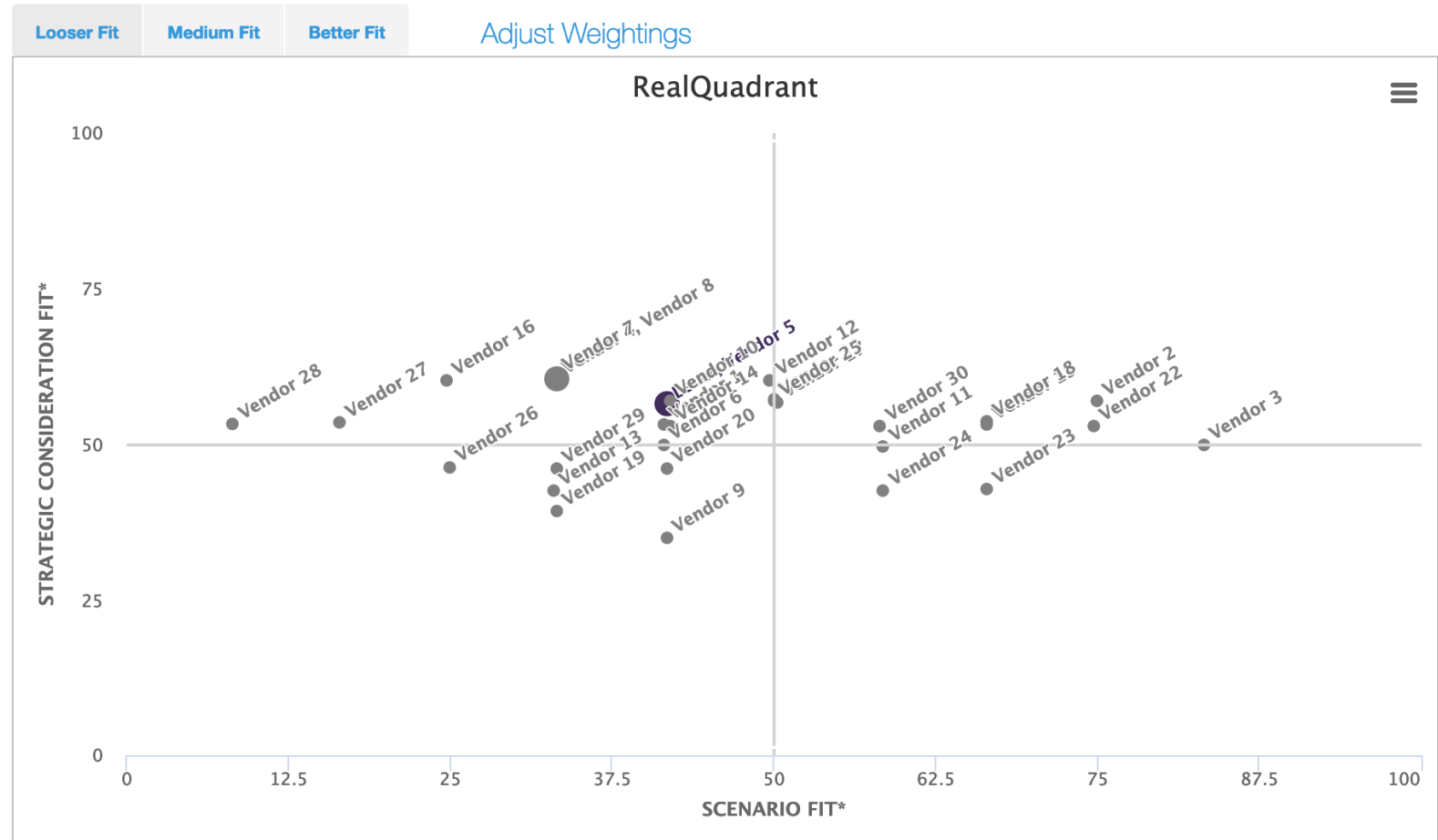
- 1 Get started by choosing a technology marketplace**  
Select  
Campaign & Lead Management Technology  
Digital & Media Asset Management  
ECM & Cloud File Sharing  
Enterprise Collaboration & Social Software  
Enterprise Portals  
Web Content & Experience Management
- 2 Select the acceptable vendor attributes for your enterprise**  
STEP 1: Technology Marketplace | **STEP 2: Criteria** | STEP 3: Use Scenarios | STEP 4: Weightings  
Criteria  
1. Does your enterprise have a technology preference?  I am open to considering all technologies including .NET, Java, PHP, and Python.  I only want to consider these acceptable technologies:  
2. Does your enterprise care if this solution is purchased via a commercial license or via an open source license model?  I am open to considering all license types.  I only want to consider these license types:
- 3 Tell us what use scenarios are relevant to you**  
STEP 1: Criteria | **STEP 2: Use Scenarios** | STEP 3: Weightings

Real...

# More Enterprise-y CDP

## Weigh the importance of each Scenario (optional)

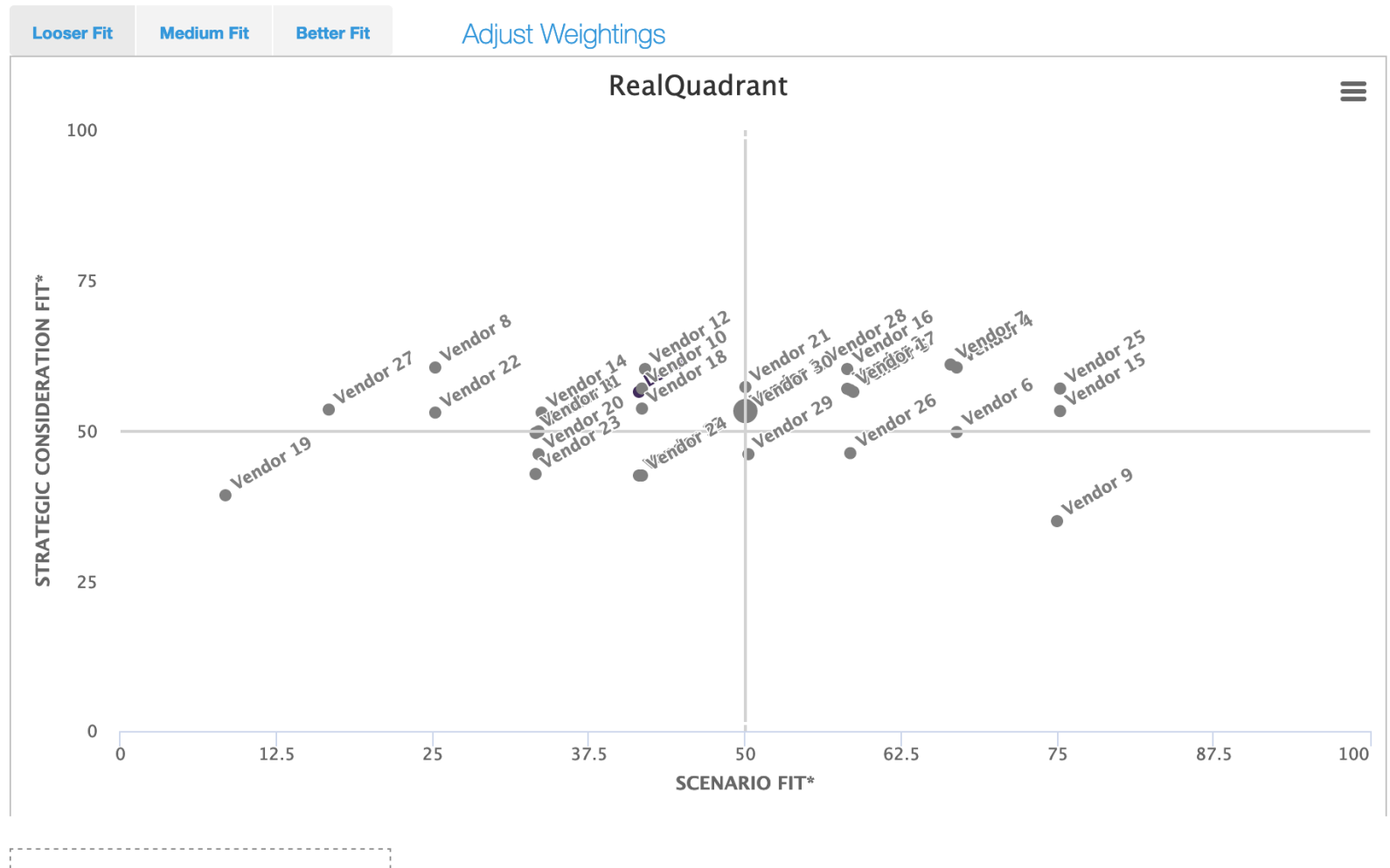
Scenario	Weight	Raw Scores
Omnichannel & Offline Aggregation	34%	
Advanced Customer Data Management	33%	
Predictive Analysis	33%	
Update RealQuadrant Chart		
<b>Total Weighting</b>	<b>100%</b>	
Must equal 100%		

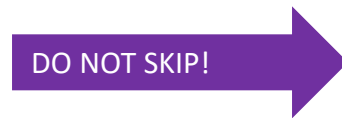
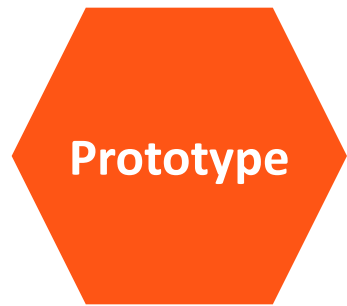




# More Marketing Ops-oriented CDP

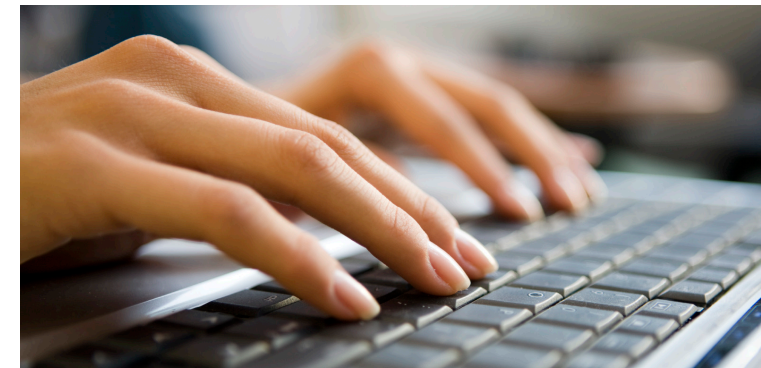
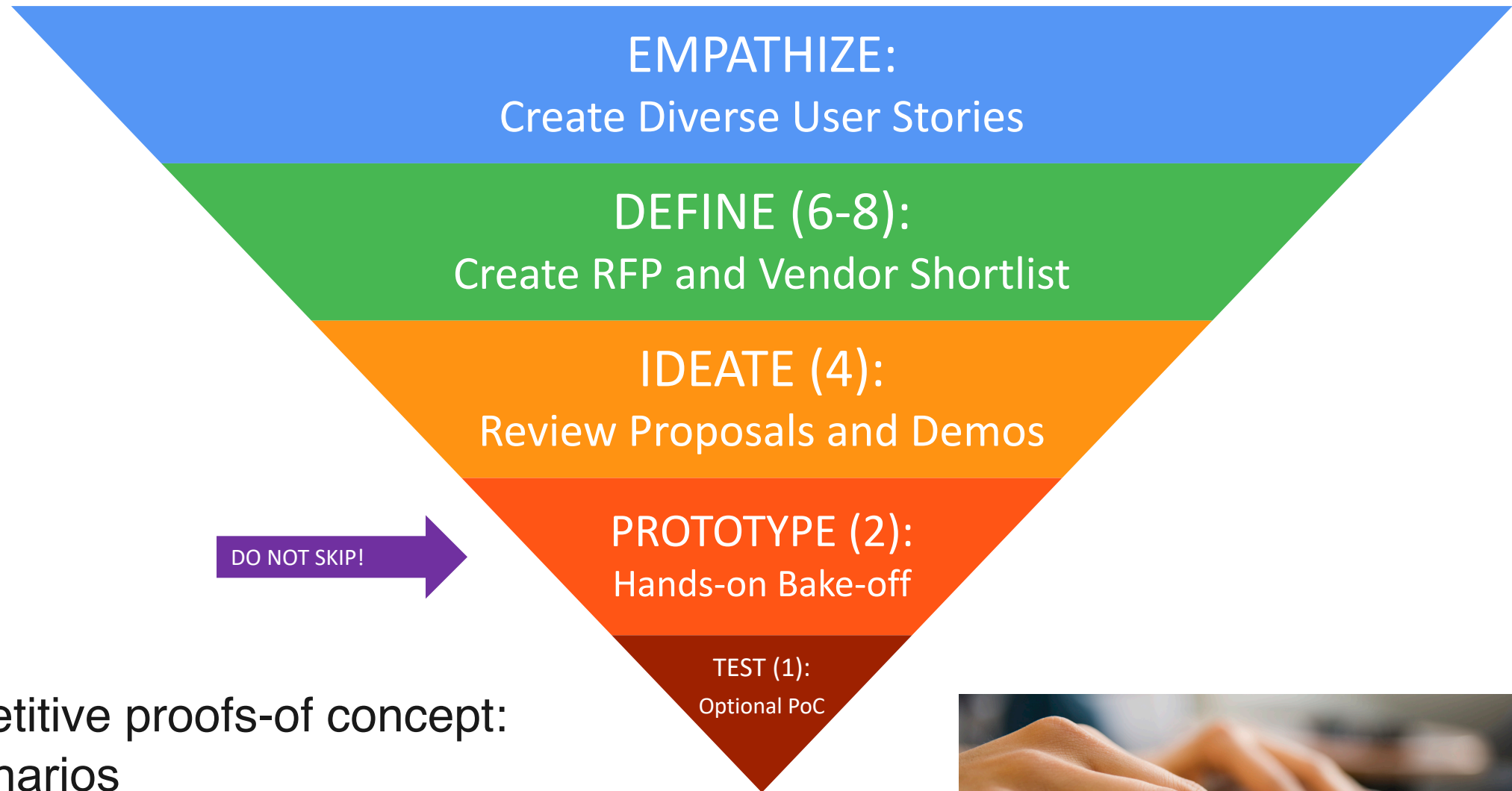
Weigh the importance of each Scenario (optional)	
Scenario	Weight
Outbound Marketing Campaign Support	34%
Online Personalization & Experience Optimization	33%
Digital Advertising Support	33%
<b>Total Weighting</b>	<b>100%</b>
Must equal 100%	





Conduct competitive proofs-of concept:

- Real scenarios
- Real (“dummy”) data
- Real people
- Real environment



# Agenda

**Shifting Architectures**

**CDP Marketplace**

**The Right Way to Select a CDP**

**Key Take-Aways**

# Key Take-Aways

1. CDPs increasingly foundational to omnichannel stack, but not “ends” in themselves
2. Vendors are sorting out into different categories, but in particular the extent to which they will / won't take on data processing and management services
3. You need to consider proper scope of CDP in your particular stack
  - With respect to enterprise customer data “fabric” or “mesh”
  - With respect to adjacent services like personalization
  - With respect to engagement services like outbound marketing
4. Avoid unifying customer record in a single departmental silo (includes Marketing)
5. Employ an agile-oriented selection process featuring adaptive testing
  - CDP Marketplace likely to remain fragmented for some time
  - Use architecture as filter, but prioritize **business scenarios** as your prime criteria
  - You will still need developers and data analysts in all cases
6. RSG research and advisory will help you make the right decisions



# Stay in Touch...



[explore@realstorygroup.com](mailto:explore@realstorygroup.com)  
[linkedin.com/company/realstorygroup/](https://www.linkedin.com/company/realstorygroup/)  
[www.realstorygroup.com/Sample](http://www.realstorygroup.com/Sample)

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TECHNOLOGY DECISIONS  
GROUP

Journey Orchestration Engine

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Customer Data Platforms

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Digital & Marketing Asset Management

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Omnichannel Content Platforms

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Ecommerce Platforms  
Comprehensive Product Evaluations

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AI for Marketing  
Comprehensive Product Evaluations