



Where Should a CDP Fit in Your Stack

August 2020

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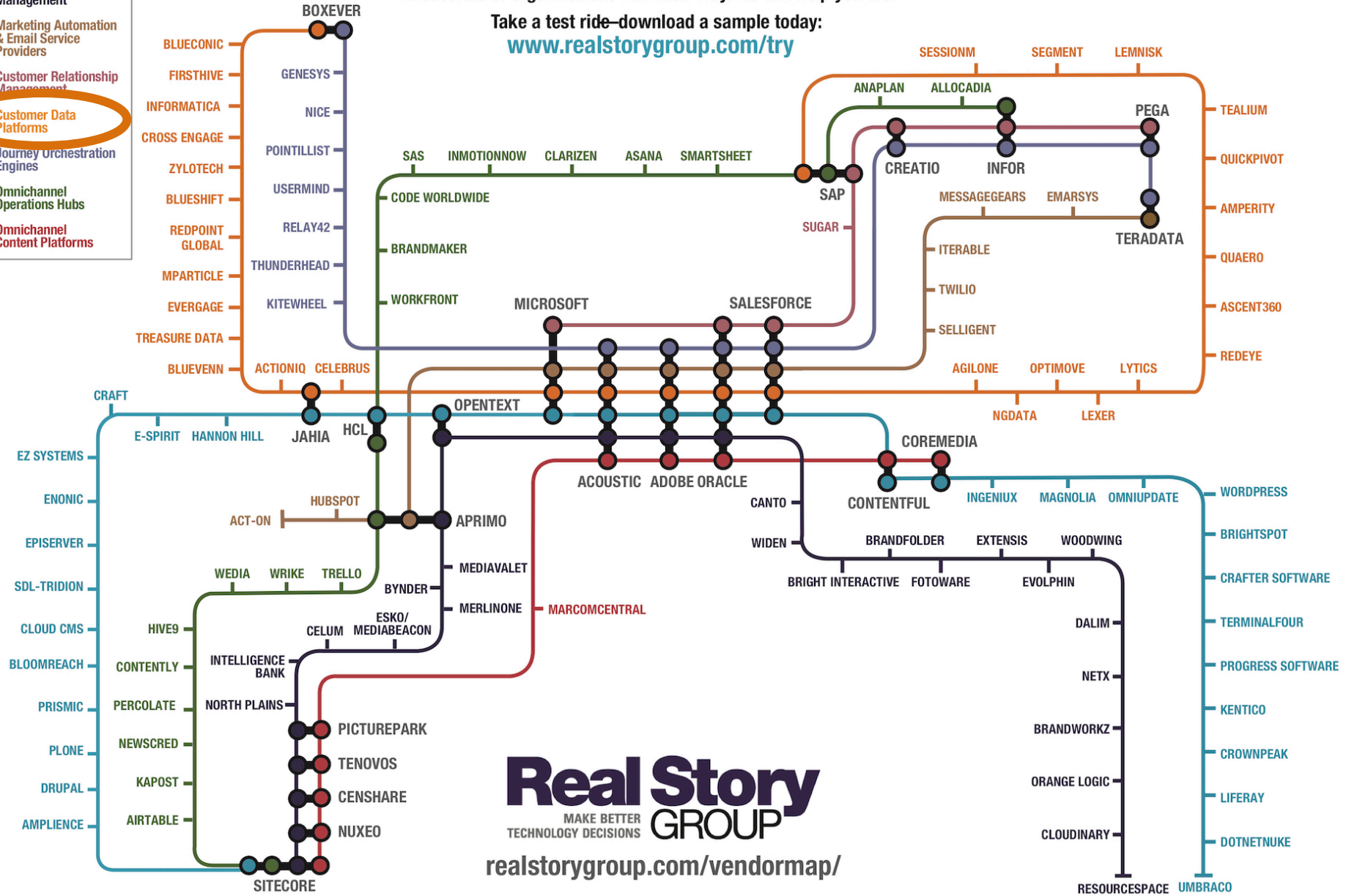
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OMNICHANNEL STACK VENDOR MAP

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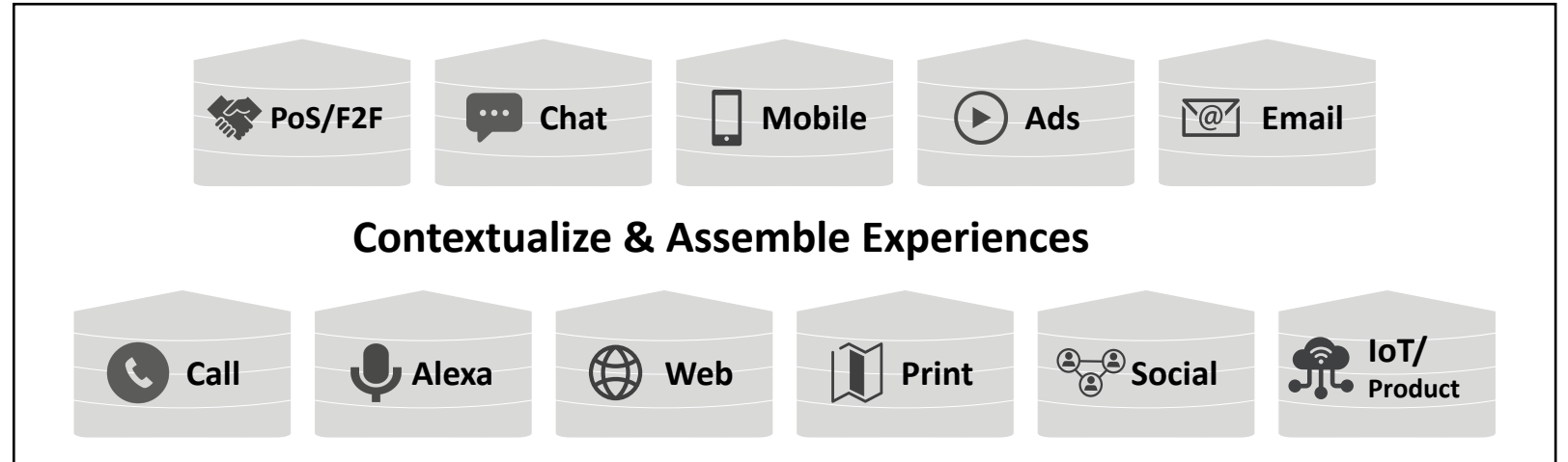
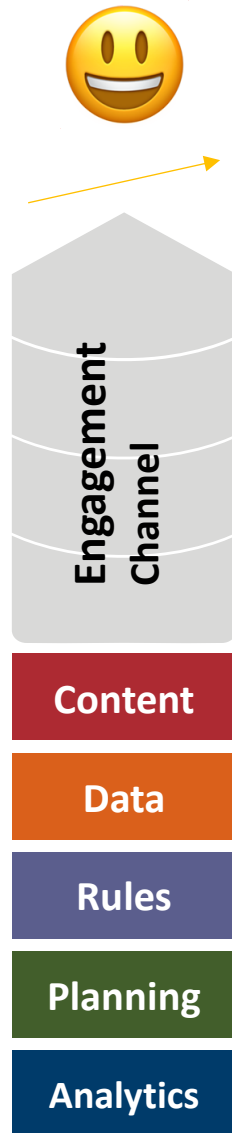
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- KEY**
- Web Content & Experience Management
 - Digital Asset Management
 - Marketing Automation & Email Service Providers
 - Customer Relationship Management
 - Customer Data Platforms
 - Journey Orchestration Engines
 - Omnichannel Operations Hubs
 - Omnichannel Content Platforms



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Context: Ideal Customer Engagement



Get the right content and message...

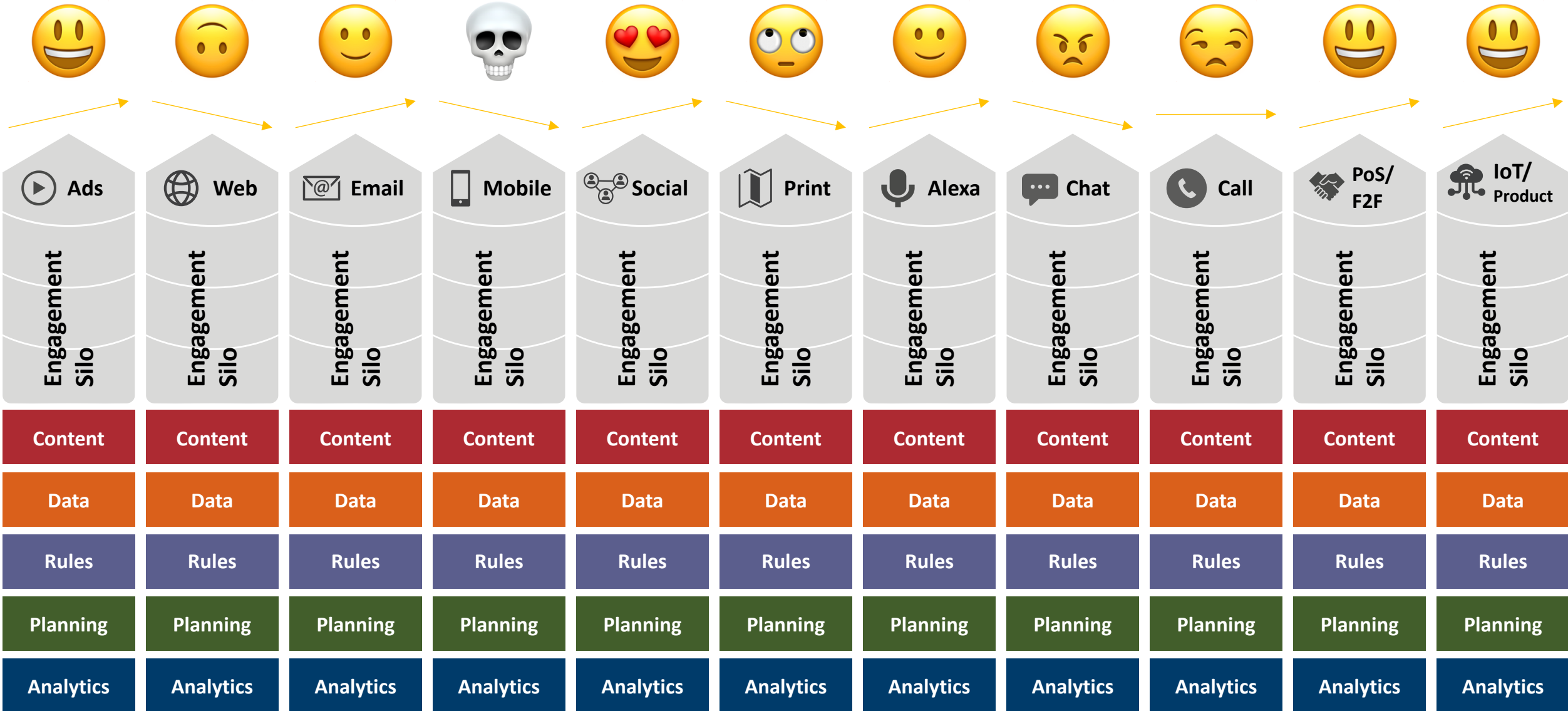
To the right person...

In the right context...

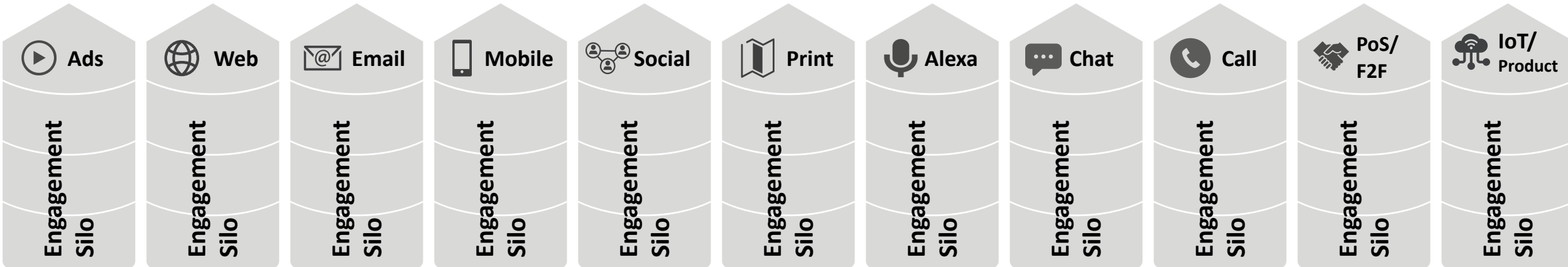
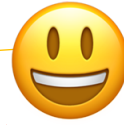
At the right time...

...And measure the effectiveness

Silo Problem: Isolated, Disjointed, Inconsistent Customer Experiences

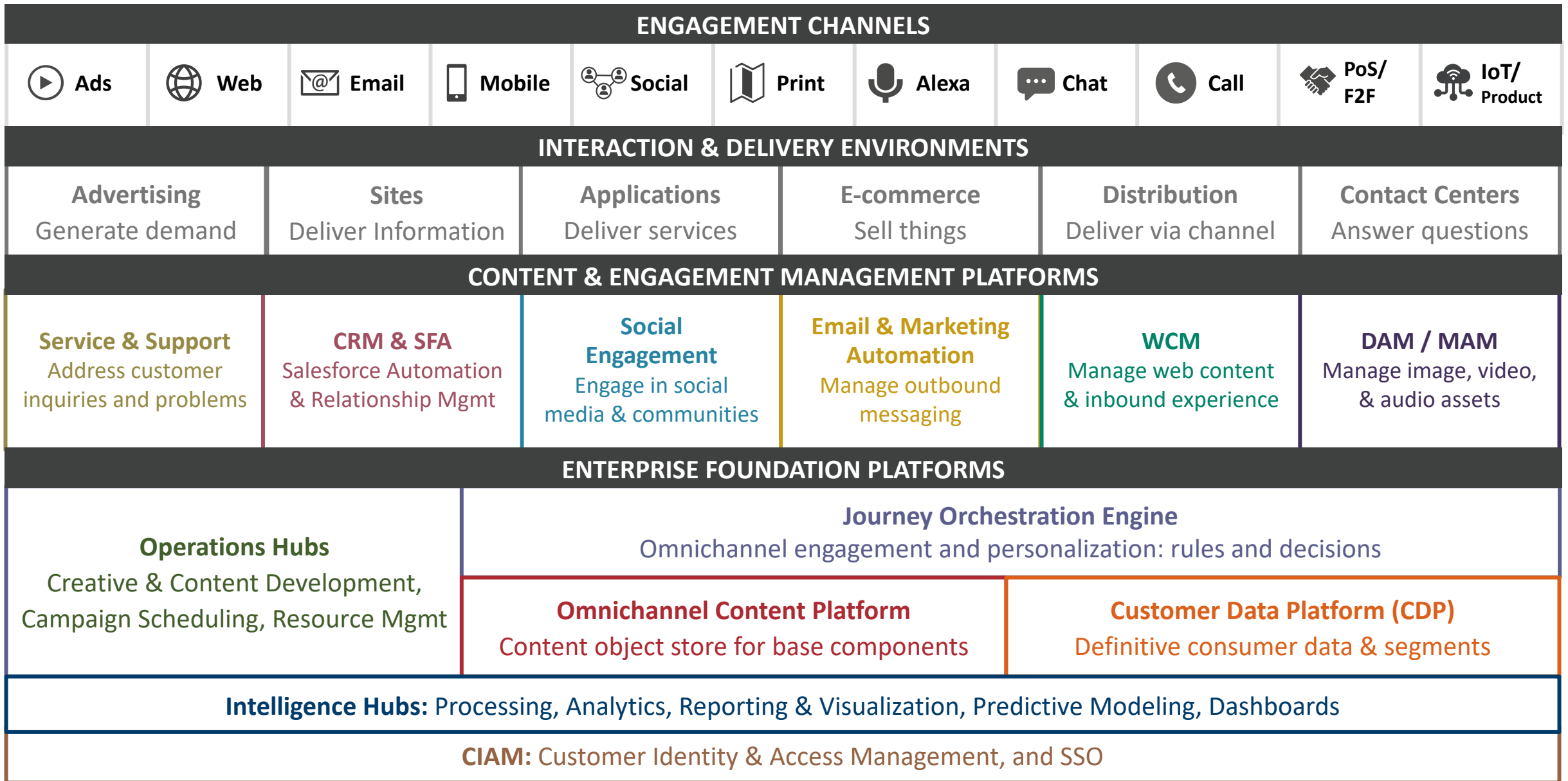


Enterprise Target Reference Model for an Integrated Customer Experience



FOUNDATION SERVICES	Omnichannel Operations: Cross-team collaboration and planning	Consistent messaging	CUSTOMER BENEFITS
	Unified Customer Data: Single source for definitive customer data & segments	"They know me..."	
	Journey Orchestration: Omnichannel personalization and next-best-action rules	Coherent interaction	
	Omnichannel Content: Single source of the truth for re-usable assets	Story consistency	
	Customer Intelligence: Analytics, reporting, and modeling	Relevant options	

Reference Architecture Model for the 2020s: Omnichannel CX Stack



CDP: Yesterday and Today

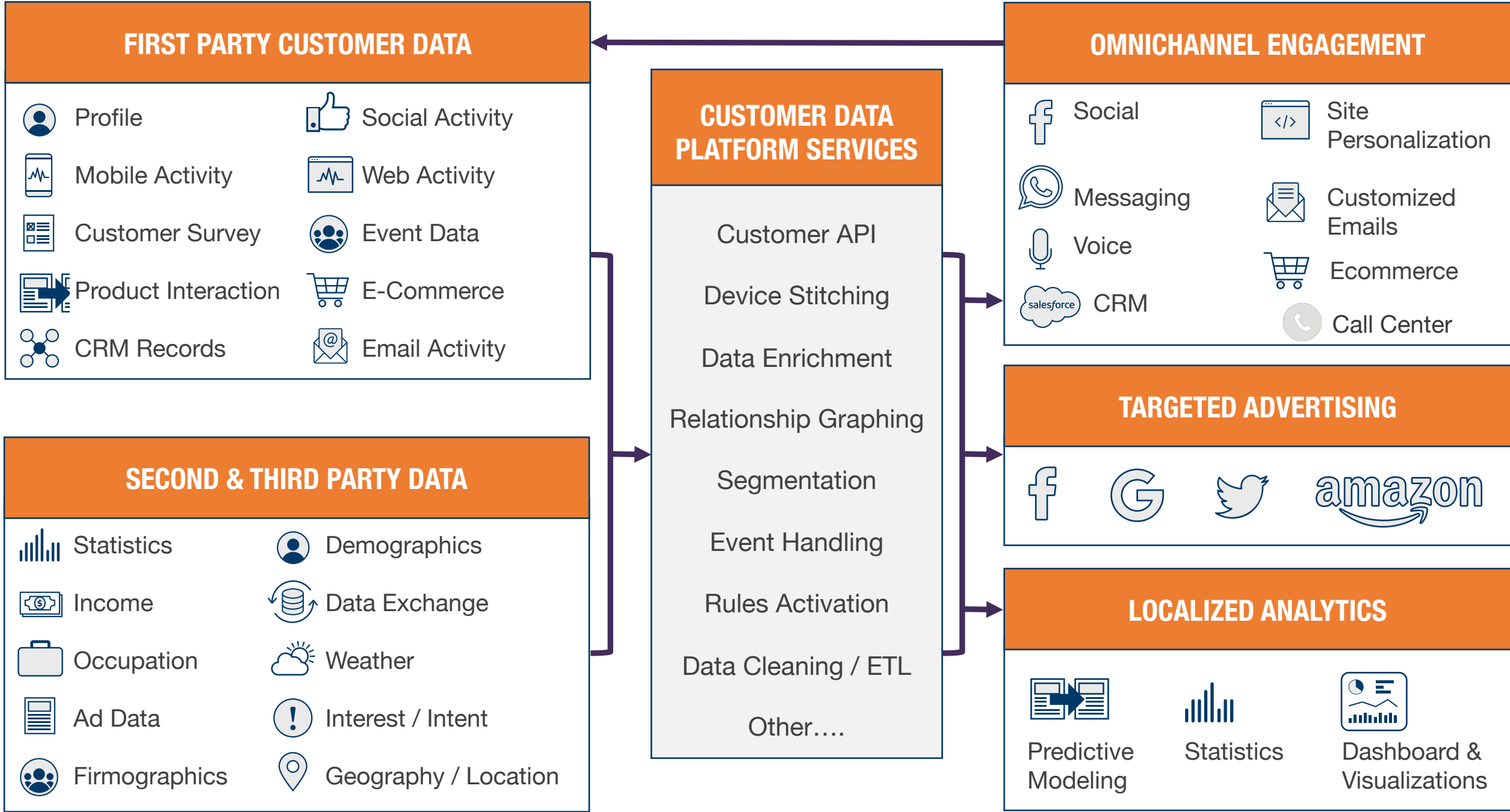
CDP 1.0 2015 - 2019	CDP 2.0 2020 - 2025
“Look at what this cool vendor can do!”	“What truly differentiates them from 35 other CDP vendors?”
“It will perform innovative AI/ML stuff”	“Is this the right data set?” “What about our other modeling services?”
“It can personalize my website”	“What about our other personalization services closer to our content and experience managers?”
“It generates nifty reports!”	“Does it have access to enough data to be relevant?”
“It can send automated messages”	“Do we really want yet another messaging platform?”
“Works for me as a marketer!”	“What about other touchpoints in our new customer-centric world?”
“It’s easy to create basic segments”	“Why do we have to do advanced building outside the CDP?”
“Supports my pilot data model”	“What about advanced needs for households, products, channels, etc.?”

We need to talk about scope: vertical and horizontal...

Data Services Scope

1





Platforms and High-Level Roles



Integration Engineer
Builds connectors



Data Engineer
Grooms data and logic for inserting, merging, updating, outputting, etc.



Data Scientist
Builds models & reports



Campaign Manager
(Defines requirements)



Marketing Analyst
(Builds & activates segments)

File Project Edit Tools View Window Layout Help

MY PALETTE

- PRECONFIGURED TOOLS
- FAVORITES
- Calculate
- Change Field Types
- Column Splitter
- Data Viewer
- Filter
- Join
- Join 2
- Merge
- Number Records
- Select
- Sort
- Splitter
- Summarize
- Summarize 2
- Table Lookup
- Unique
- Validate
- Repository

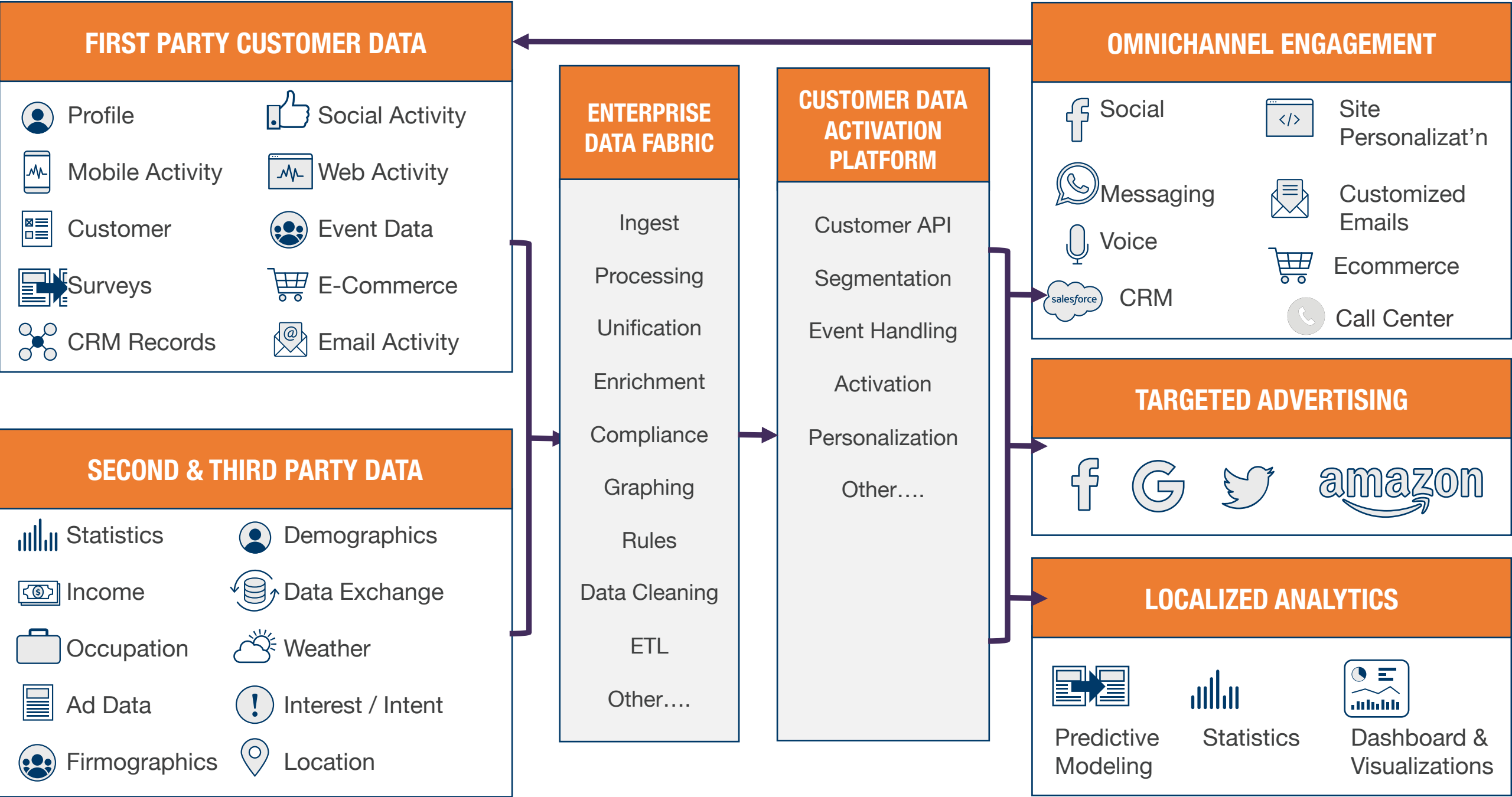
Data Viewer

1,000,000	NAME	ADDRESS	CITY	STATE	ZIP	PHONE	ID
1,512	MICHELE M DOUGLAS	105 CROSS ST	BRIDGEWATER	MA	2324	3390860844	100817250
1,513	JOHN R LITKE	25 SAVOY RD	FRAMINGHAM	MA	1701	<<Null>>	102345226
1,514	SILVIO J SMERIGLIO	38 LOOP RD	SAVOY	MA	1256	<<Null>>	101917702
1,515	B MACAPINLAC	10 SOMERSET RD	CHICOPEE	MA	1020	3395270651	100112814

Management Capabilities
Prepare data for activation



Activation Capabilities
Leverage data for more effective engagement

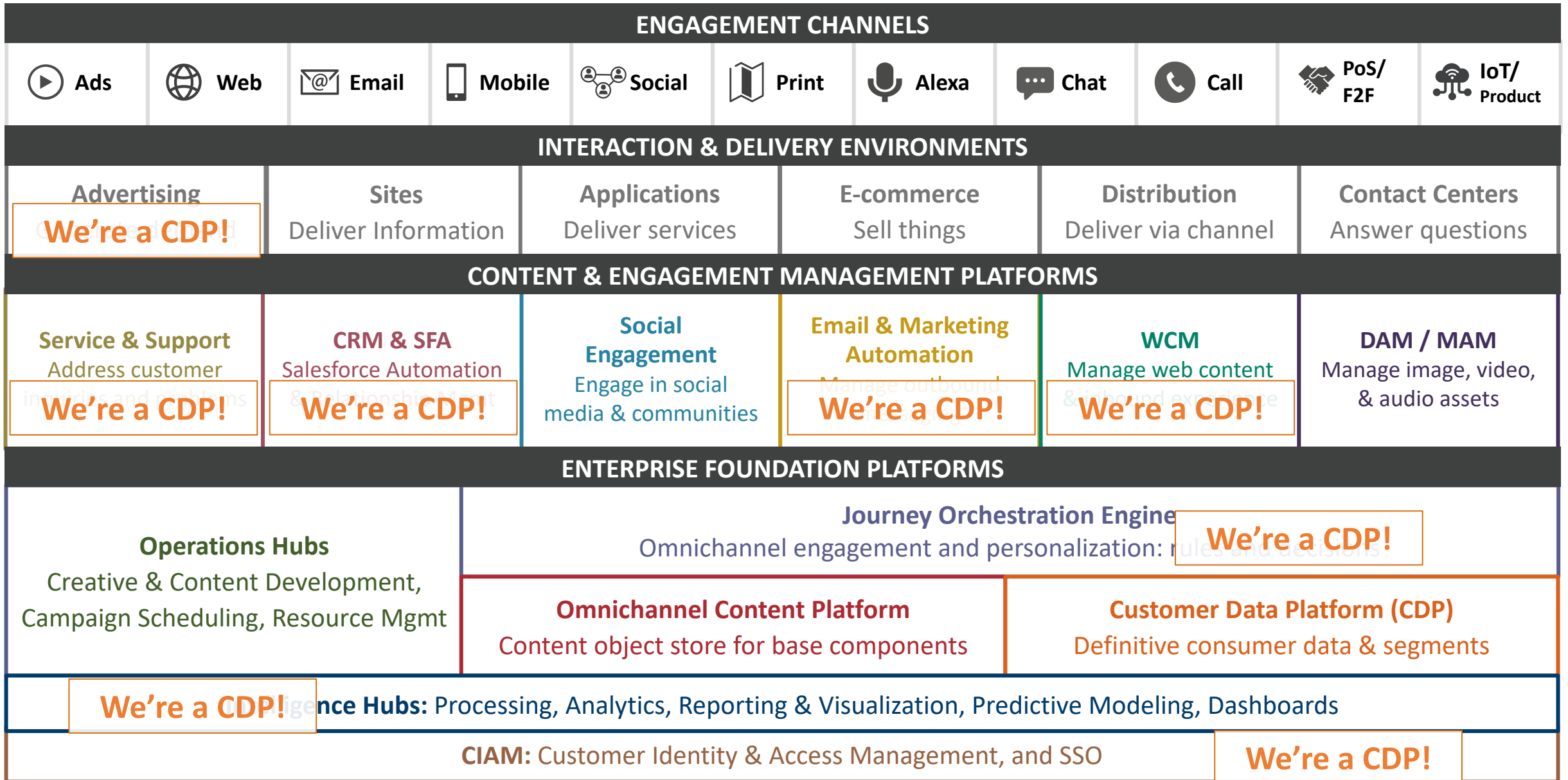


Engagement Services Scope

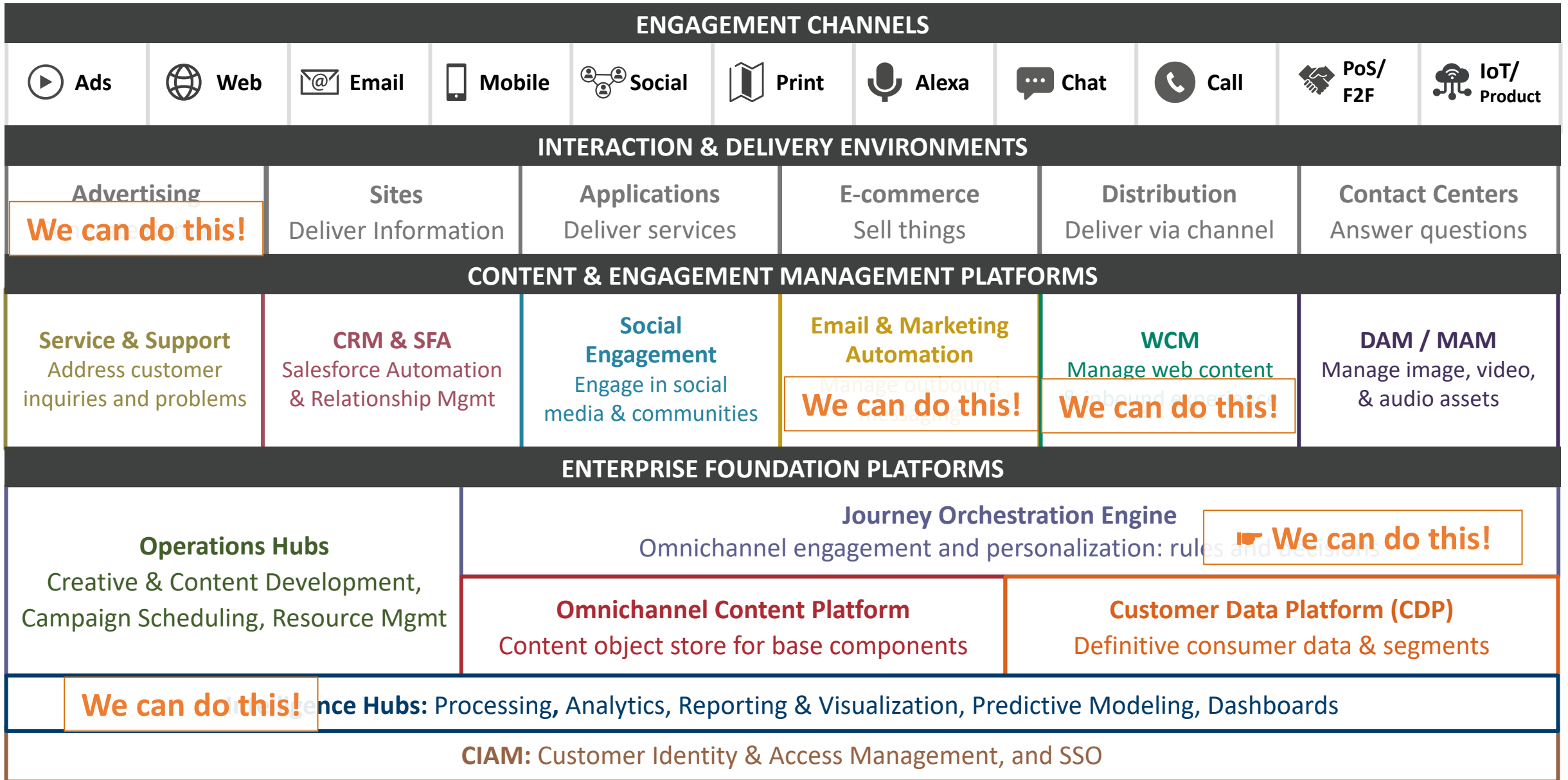
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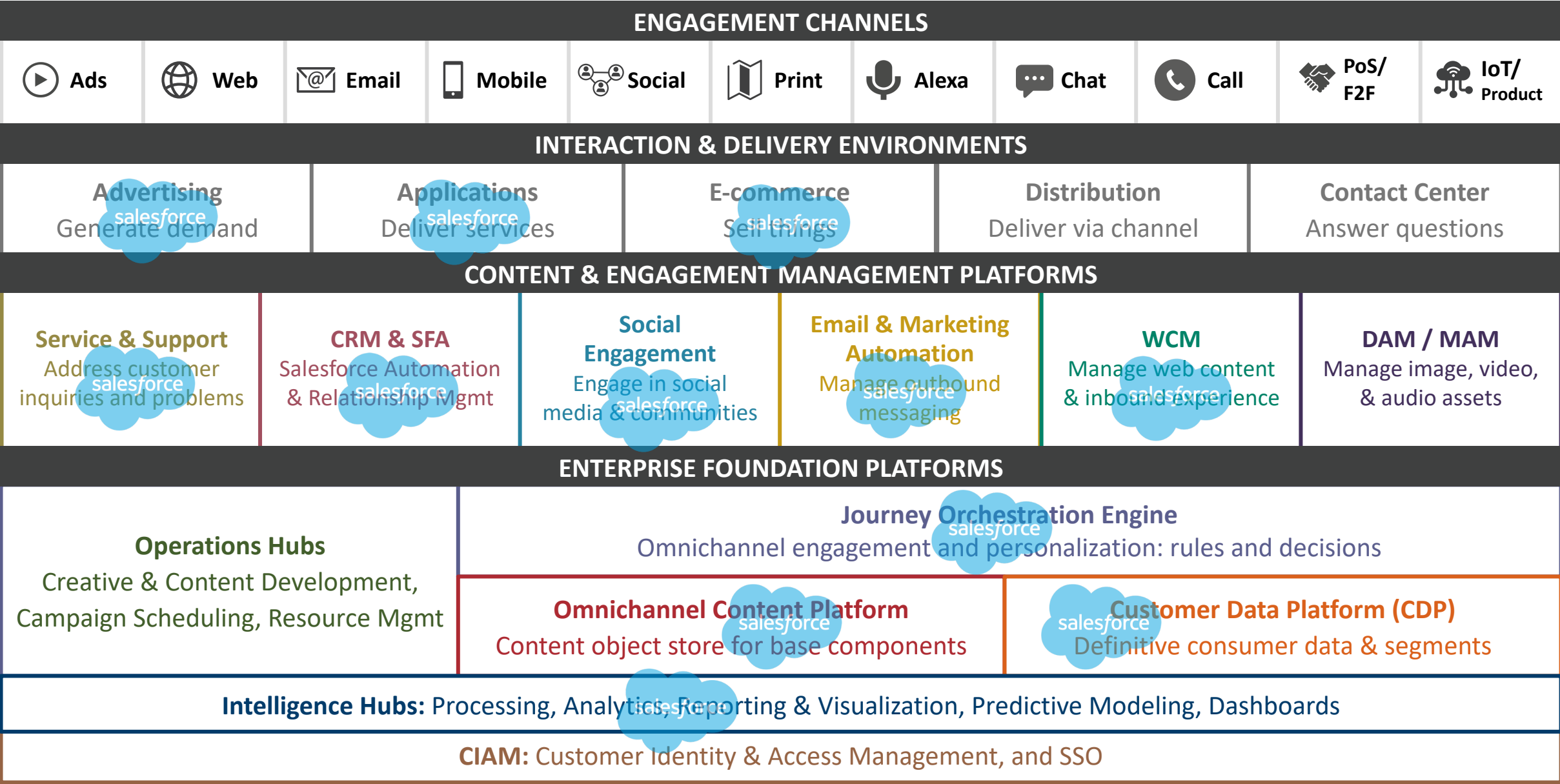
Beware Other Platforms Trying to Hold Definitive Customer Data...



CDP as Marketing Suite...



Single Vendor Tends to Mitigate Against Efficiency and Effectiveness





Marketplace Considerations

CDP Logo Landscape

Suite Vendors



Pure-Play Platforms



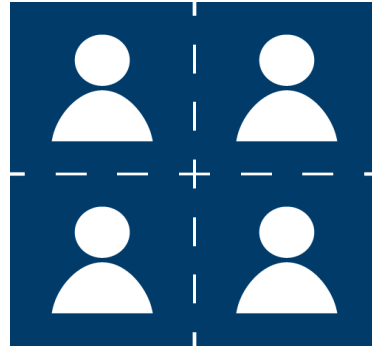
Ten Potential CDP Business Use Case Categories



Advanced Customer Data Management



Predictive Analytics



Outbound Marketing Campaign Support



Online Personalization & Experience Optimization



Ecommerce Recommendations & Optimization



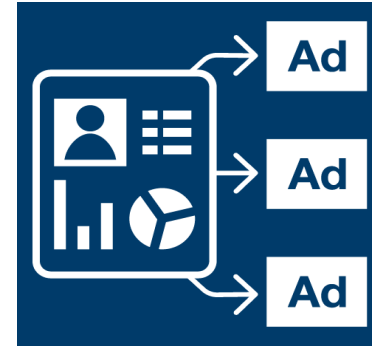
Omnichannel & Offline Aggregation



Realtime Behavioral Analysis



B2B / Household / Channel Support



Digital Advertising Support



Loyalty & Rewards Management

Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Best practice to prioritize business importance among them

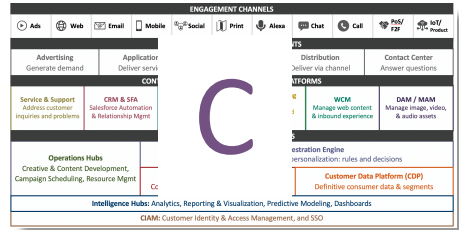
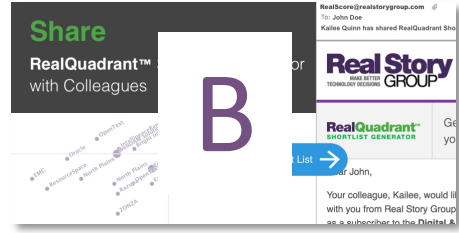
Key Take-Aways

1. Don't purchase a CDP until you figure out **where it will sit** in your stack
2. **Data management scope** will quickly narrow your choices
3. **Evaluate service scope** carefully to avoid unnecessary duplication
4. Beware mindlessly **selecting CDPs from suite vendors**
5. Meta story: **do your research**
6. Always follow a **use-case, test-based selection process**

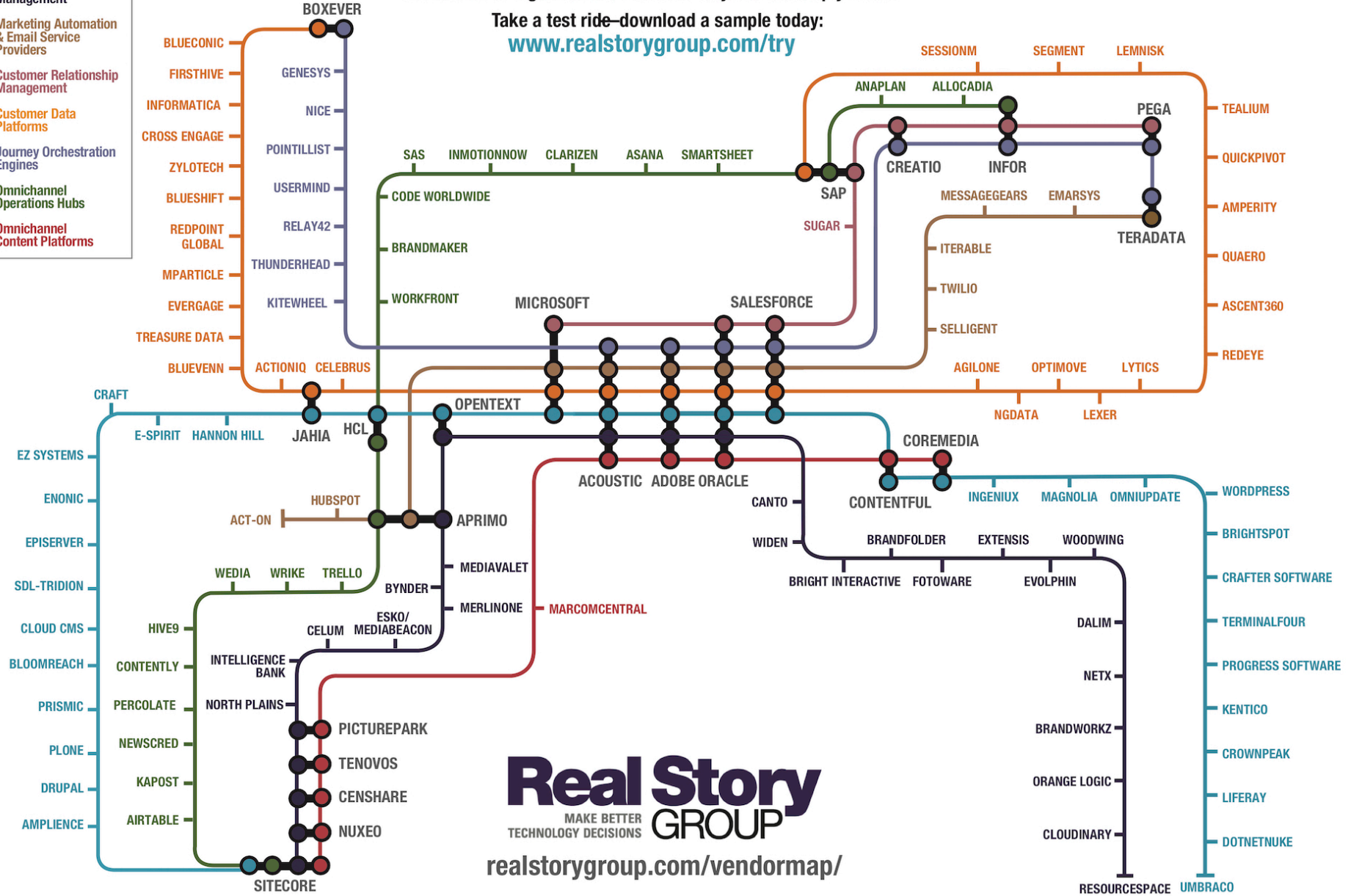
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Journey Orchestration
Engine

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Campaign & Lead
Management Technology

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Customer Relationship
Management