



**EVERYTHING YOU NEED TO KNOW
ABOUT CUSTOMER DATA
PLATFORM**

July 2019



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Contextualization



Introduction

The need for unified customer data is not a new concept. Indeed, marketers have been trying to control their own customer data for a long time now. Ideally, a good database collects and integrates all data sources related directly or indirectly to the customer, across all the enterprise systems that manage and record the points of contact with them.

This is what many systems already claim to be doing. So why is a new category of MarTech solutions, the Customer Data Platform, needed to meet this challenge? What will they bring compared to existing solutions on the market? How to understand the impact of the CDP on current methods?

These are the questions that will be covered in this white paper, which we hope will provide you with all the basics to understand what it is, what it is for, how to implement it, by whom, when and where.

Good reading !

Martin Kihn, Gartner

« No marketing tech in recent memory has shot up the hype curve so far, so fast, as the Customer Data Platform (CDP). »

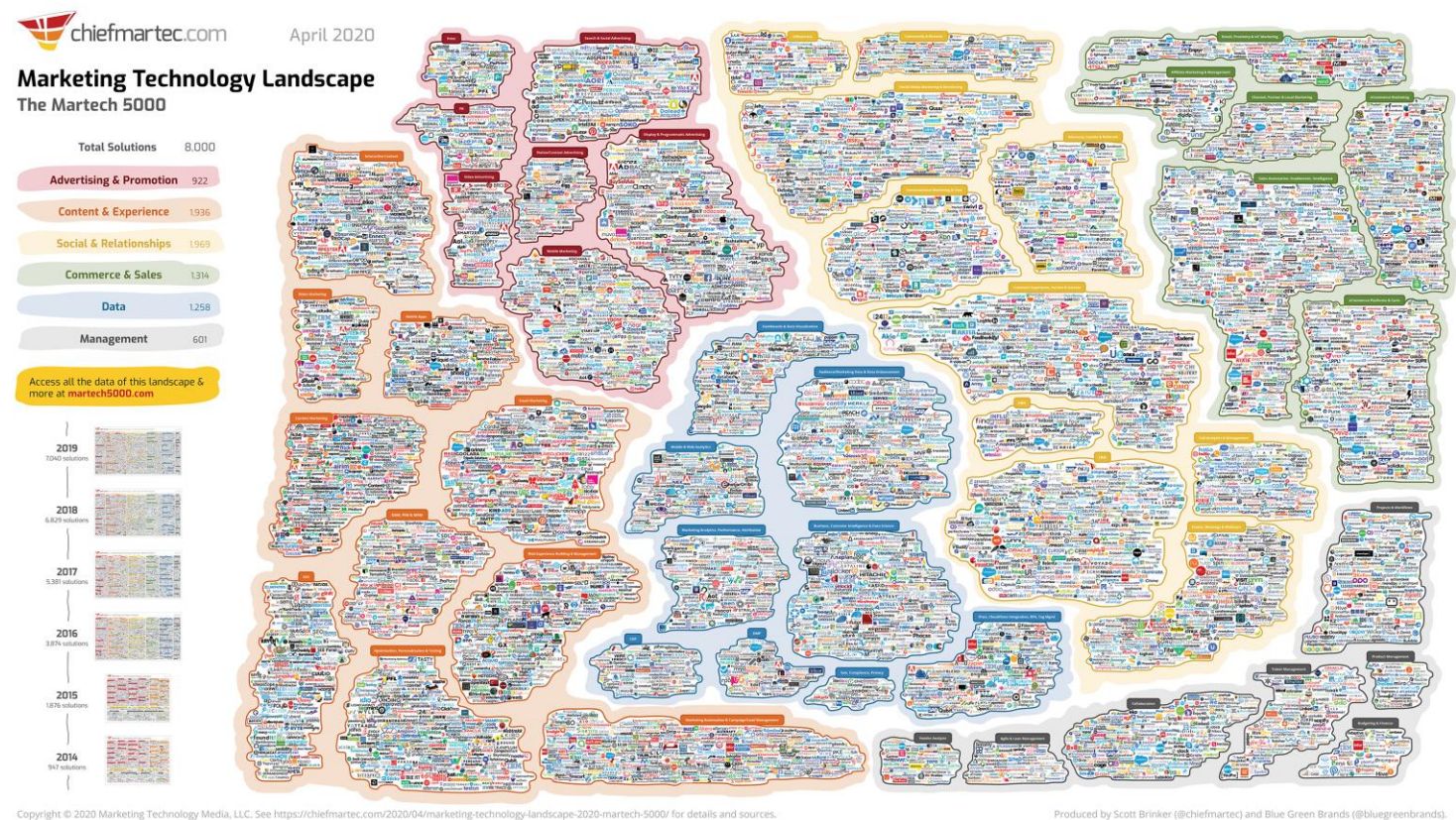


Technologies (MARTECH)

Before even talking about Customer Data Platform, we must go back to the basics. Why is a technology like this needed on the market? Well, the first big reason to think about is certainly the MarTech environment that keeps getting bigger and more complex. [Chiefmartec.com's Supergraphic](https://chiefmartec.com/supergraphic) is well-known for listing these tools on an annual basis. As you can see below, in just 2 years, these technologies have doubled!

At the launch of the 2018 report, there were **6,829 marketing solutions (tech) on the market**. These were sold **by 6,242 unique suppliers**. So there are many (!) companies selling a single marketing solution, which does not facilitate connectivity.

So, what happens if you have X tools to do a single campaign? How do you evaluate performance if it is not centralized?





Challenges

Looking at this technological landscape, several challenges dot the integration and use of these for marketing teams.

Overall, here are the main ones that will most likely resonate in your organization.

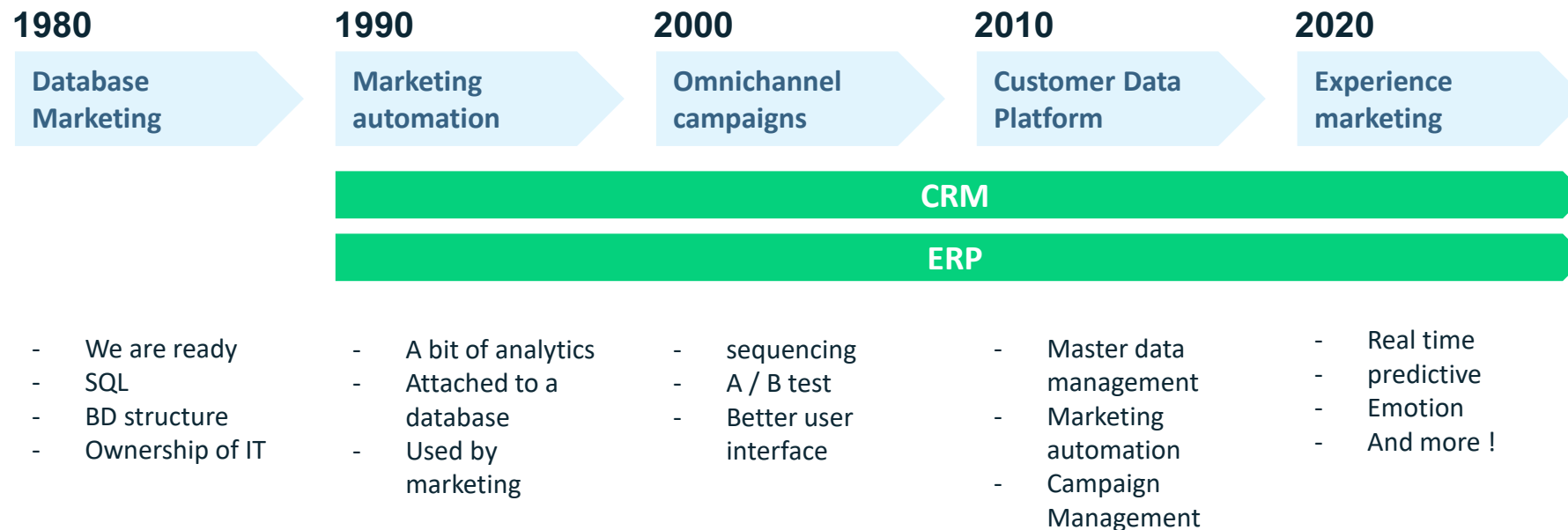
1. Understand the technologies that will really be used by marketing teams to address issues and daily needs.
2. Approach the choice of a technology based on business realities, other solutions in place, internal skills, and more.
3. Choose the right technology with confidence, ensuring that it meets a large percentage of internal needs.
4. Connect all the tools (marketing and others) between them to support the production of effective marketing campaigns.
5. Get a centralized view of customers, prospects, data, ongoing campaigns and performance.

« Marketers use data from a median of 15 sources, up 25% since 2018, according to this [State of Marketing report](#). Each new source ups the need for integration. »



History

The challenges mentioned beforehand are an extension, and an evolution, of the last years. For a long time now, we have sought to create a unified and centralized consumer view at all levels of the organization. This is what CRM and ERP were looking to do before. Starting from data stored in complex environments (1980), we went from automated silo marketing to one organized in an omnichannel media environment. By the end of this decade, we are moving closer to this goal of centralization with the CDP, which will continue to enrich experiences provided to consumers.



Customer Based Marketing

Now, to offer customers more memorable experiences, you need to understand who they are and what they want. This is all the more important when we look at the changes taking place in societies. It is increasingly difficult to follow this client, and yet, it is increasingly essential to do so, given the expectations of these customers.

Changes

Démographics	Channels	Communication	Decision
<p>Whether it's the differences between generations, economic and political reality, openness between countries ... in short, all this affects the way individuals consume, analyze, communicate, meet ...</p> <p>It is necessary to know and recognize these differences to adapt marketing and communications actions.</p>	<p>The multiplication of marketing channels is not a new subject, but it is not about to leave.</p> <p>Whether talking to the consumer on the right channel, or at the right time, it must also be considered that this can change without notice, that the customer journey is not linear.</p>	<p>An individual is exposed to thousands of communication messages a day, a reality that is now solidified with the web.</p> <p>Whether it's producing quality content, choosing the most effective advertising message, or using different formats of communication ... it must all reach the consumer at a moment where he is receptive to what is sent to him.</p>	<p>Decisions are now influenced by increasingly abstract concepts, such as the relationship with the brand, the emotions that the offer engenders, the values an organization brings, and tangible ethical actions brought by the organization.</p> <p>Not to mention the influence of the web on decisions (recommendations, mobile store, etc.)</p>



Customer Based Marketing – The musts

For these reasons, organizations need to put in place a **Data Centric culture**, and organizational strategies that underpin that direction.

Data Centered = Customer Centric: Companies that invest in data can deliver superior messaging, efficiency, and customer experience across all functions of the organization, not just marketing. ... So placing your data at the center of your business is putting your customer at the center of your business.

Business Alignment

Ensure buy-in at all levels of the organization, which must come from above to the floor teams. Then, develop internal procedures to support its integration.

+ Stack MarTech

Get the right technological tools to understand the customer and implement the actions that meet their needs and expectations.

+ Insight Data

Procure the right organizational systems to understand the actions to prioritize and create medium and long-term plans.

+ skills

Delivering on promises, setting up the teams responsible for this orientation, but also by increasing the skills of the teams in place.

THE MUSTS



Personnalization

Finally, these changes in the technological and consumer environments support new marketing approaches. These greatly influence the way we communicate with everyone in relation to our brand, in order to generate a relationship that goes beyond simple acquisition. There is more and more room for relationship marketing, one that values relationships in the medium and long term.

To achieve this, personalized marketing will be at the heart of tomorrow's marketing strategies! To continue, and to be effective, organizations will need to be able to:

- **Integrate customer data:** Marketers use data from, on average, 15 sources. This is up 25% since 2018. In addition, new sources increase integration needs. How to unify everything?
- **Thinking about the customer at all times:** Moving from segment / persona marketing to hyper-targeted messages, based on real consumer consents. How to reach this level?
- **Predictive Analysis:** An increase in this kind of method is expected to improve segmentation, propensity models and recommendations. How to integrate these aspects?
- **Real-time Response:** In addition to automated campaigns, we need to be responsive to our customers' behaviors and engagement quickly. How to get there successfully?

Julian Hillebrand

"Personalized marketing and advertising is not about selling. It's about establishing a relationship with the customer. "



When personalization is schematized

Create a complete integration of data



Direct a Customer Based Marketing



Execute predictive marketing ... at least automated



Get to real-time response



Provide a unified, memorable and personalized customer experience. Based on ...



Web behavior

What are his actions online? (visits, purchase, etc.)



APPS and IOT

What is his level of engagement ?



Conversation social

What is his level of reactivity ?



Call center

What are the past complaints / requests?



Marketing Campaigns

What are the past and future interactions?



Démographics

What are the data to recognize him/her ?



Stores

What are the actions carried out at the point of sale?



The Customer Data Platform in all this?

UNIFICATION

1 platform to unify
all data

OMNICHANNEL

Connections by
API, import, and
other connectors

PERSONNALIZATION

In all channels
according to a
variety of
information

ORCHESTRATION

Relatively
simplified by an
overview of the
possibilities

As a result, in a complex and difficult to navigate business marketing environment, it is necessary to put in place working methods that support major business strategies, such as the Data Centric one, but also to implement tools capable of supporting these visions. This is what the Customer Data Platform seeks to address for marketing teams who want to be more efficient and more engaged with their customers.

Now, let's find out now how the CDP works!



Conceptual basics of CDP



Types of CDP

CDPs are still very new, and their conceptualization continues to grow. It's still a relatively small competitive space, especially compared to emailing, automated marketing, CRM, and more. However, in the United States, there is the CDP Institute, which aims to provide independent information on suppliers, methods and technology. They are, for the moment, the reference regarding this type of solution. Indeed, their site is rich in content, and it is in 2018 that the Institute has specified 3 types of CDP.

Data Assembly

This first type performs the most basic and central aspect of a CDP. It collects customer data from various source systems, forming a unified database.

It then makes this data accessible to external systems.

+ Analytics

In addition, this type includes analytic applications to track a client across multiple channels, provide insight into its behavior, and analyze third-party data.

They also perform customer segmentation, data modeling, and the ability to send segmented lists to marketing tools, such as messaging software, the Data Management Platform (DMP), and customization platforms.

+ Customer Experience

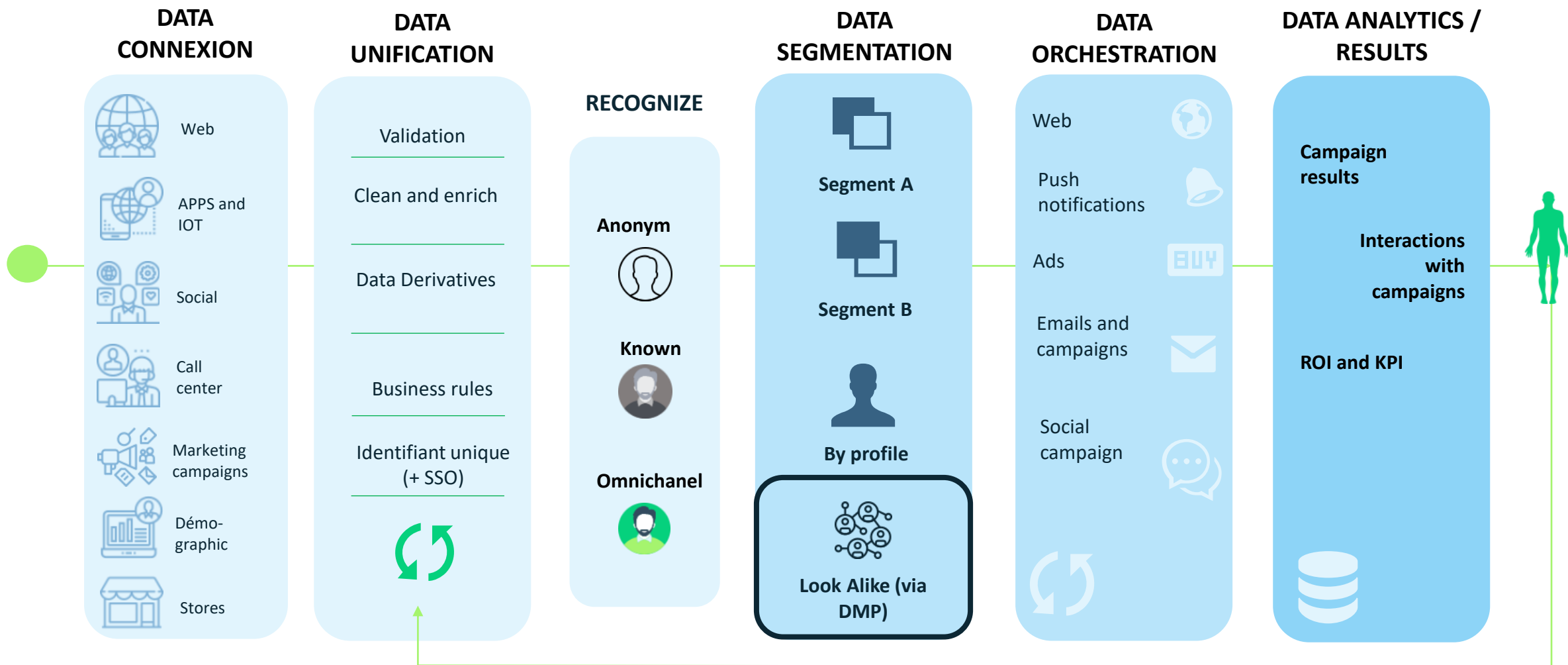
In addition, the latter type manages omnichannel campaigns throughout the customer journey.

At the orchestration level, this translates into ultra-personalized communications, real-time response management, and two-way handoffs with DMPs to provide highly refined customer segments.

TYPES DE CDP

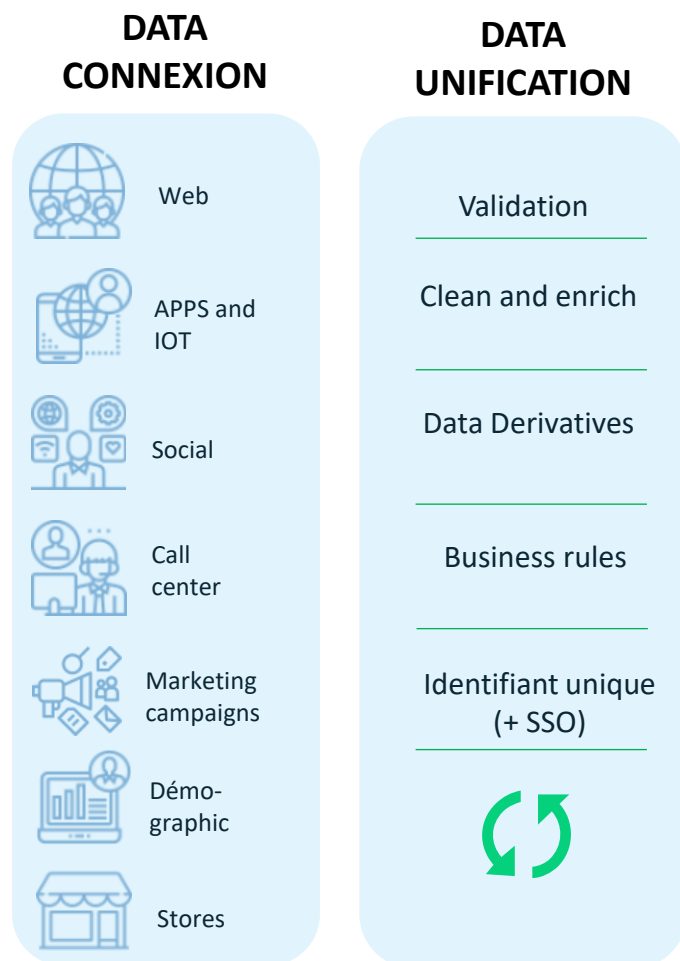


Customer Data Platform schemas





Portion 1 - Unique Customer Repository



The CDP first seeks to unify customer data in a database that persists over time. To do this, it must be available and connected to several external systems, which feed the CDP continuously. It is in this context that we speak of a **360 view of the client**, since all the information relating to the latter is collected in one place.

But the work does not stop there, since the data is raw, and must be processed. IT then passes through a series of automated actions, which run continuously, to be validated or rejected. The goal is to continually optimize the contact card (but also to enrich it). **It's the pre-established business rules that allow you to place that data and create what's called a single customer repository.** Thus, a contact is recognized with one and the same identification key.

It is this process that allows you to recognize a contact from the beginning (unknown status), until it is known (identified), and then follow it in an omnichannel mode.

RECOGNIZE

Anonym



Known

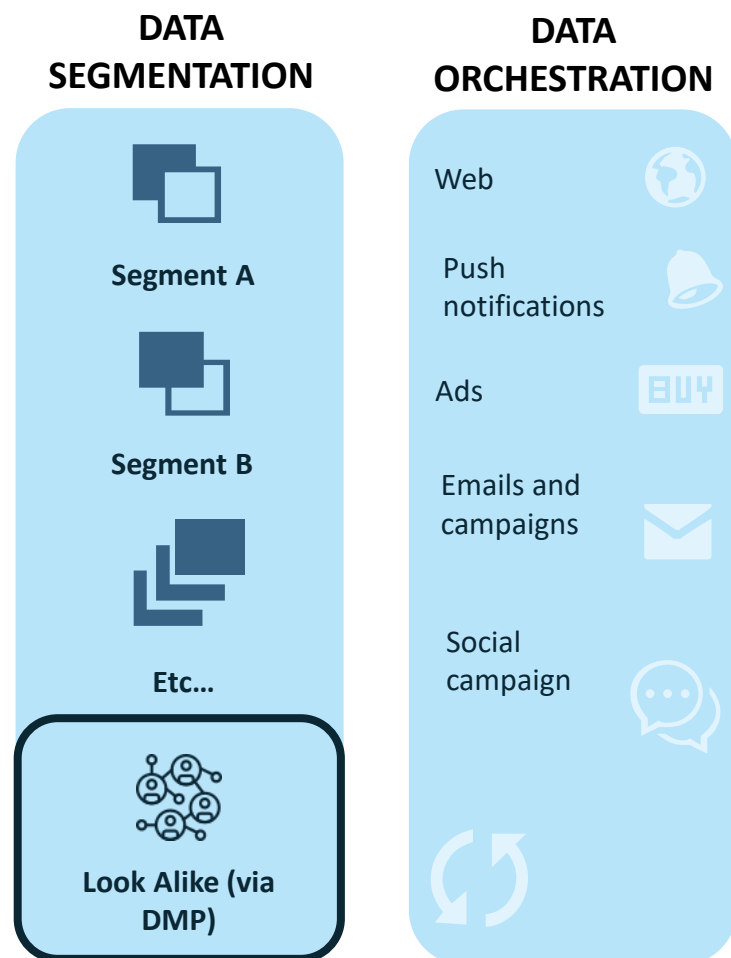


Omnichannel





Portion 2 - Campaign orchestration



The DMP fits here, since it can refine the segmentation by offering what is called LookAlike Segment: a method frequently used by advertisers to define the consumers most likely to engage in your marketing messages. This model considers common traits or behaviors of current customers and looks for consumers with similar characteristics.

Once unified data and known clients is done, it is possible to switch to campaign orchestration mode, in addition to doing it effectively!

Starting with the creation of segments differentiated from each other, depending on criterias that you deem relevant. In a CDP, segments must be updated automatically, on a regular basis, as constantly as needed. In an advanced vision, you would go further than segments to look towards profiles.

It is here that one reaches advanced levels of customization, even going to a so-called 1 to 1 personalization. Thus, each contact preference, behavior or commitment can trigger communication actions.

These will be focused on a range of channels, including websites, mobile, emails, or social media. **In fact, where an interaction with the customer is supported by a technology, it is possible to enrich this touchpoint with profile data.**

We can then modify interactive terminals, sales tools in stores, smart watches, etc.



Portion 3 - Analytics and results

DATA UNIFICATION

Validation

Clean and enrich

Data Derivatives

Business rules

Identifiant unique
(+ SSO)



The last step in the CDP process is enriching the knowledge of your contacts. The more they interact with your communications, the more data you get on them.

Regarding analytics, it is necessary to consider the results of campaigns (opening rates, clicks, bounces, answers, etc.). These results are especially relevant for the construction of automated marketing scenarios, based on some so-called traditional data.

EX: Send an email to people who have not opened this email.

On the other hand, the true value of your offer in the eyes of the customer lies in engagement, and what you can do to encourage that. Engagement can be a purchase (or average basket value), a notice / comment left, a recommendation, the use of a discount, a download ... and much more! The more engagement your contacts make, the more you know what they like. That's what improves marketing campaigns with targeting and personalization.

This is the value of relational marketing: valuing loyal customers, who demonstrate a strong commitment to the brand.

DATA ANALYTICS / RESULTS

Campaign
results

Interactions
with
campaigns

ROI and KPI





Gains

**Get a complete
view of the
customer**

**Strengthen
commitment and
customer
relationship**

**Simplify the
use of data**

**Enrich customer
knowledge**

**Reduce
customer
attrition**

**Organize the data
systematically**

**Create a Data
Centric
Marketing**

**Improve the ROI
of marketing
campaigns**

**In 2018, CDP organizations were two and a half times
more likely than their peers to outperform on their
primary marketing objective.**



Important basic criterias

Now that you know the principles behind a CDP, you must also recognize the criterias that differentiate this category of products from others. To facilitate the task and unify the conversation in the business world, the CDP Institute establishes five, three of which are priorities.

Controlled by marketing

A real CDP must be used, understood and mastered by marketing teams. It can not be downgraded to IT or BI teams because their use is too technical / complex.

Thus, all concepts of P.14 must be managed in the application, with user-friendly interfaces.

+ Single customer repository

The CDP creates a complete view of each customer by capturing data from multiple systems, linking information about the same customer and storing it to track behavior over time.

Thus, the unique identifier must persist in order to recognize a contact on all the channels that it uses.

+ System connectivity

Data stored in the CDP can be used by other systems for data analysis, customer interaction management, and campaign orchestration.

These elements can be done inside the CDP (depending on the features provided) or else with external tools, guaranteeing a bidirectional connection.

A CDP Institute study found that CDPs deliver "meaningful value" for four of five organizations that have deployed one.



Other criterias

The CDP Institute also provides additional criteria, primarily to qualify service providers in their offer. However, these criteria are unique to the Institute, and are considered when selecting CDP providers who apply for their accreditation. It is recognized only by the CDP Institute, and is not an official worldwide accreditation . These criteria are very interesting for purists and suppliers looking to join less than twenty companies currently accredited.

Keep details about original data

The system stores data (such as transactional data, navigation data, personal data, etc.) with all the details provided when they are loaded.

This means that it maintains an audit trail to ensure the accuracy and consistency of the data.

+ Access individual data

The system can access all the detailed data associated with each person (as opposed to the tags that define segments).

+ Can handle Personally Identifiable Information (PII)

This includes the name, address, email address and contact numbers. As a PII, this means that the data can only be processed in accordance with the rules of confidentiality and security.

Comparison between MarTech tools



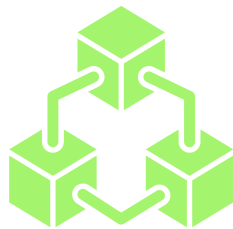


MarTech comparison

Beyond the more theoretical concepts surrounding the CDP, it is still difficult for many marketers to differentiate the CDP from other tools commonly used in marketing departments, but also across the organization.

In this section, we will cover the differences between:

- CDP and CRM
- CDP and a DMP
- CDP and common marketing tools
- CDP and DWM, TMS, ERP and MDM





CDP versus CRM

CRMs track the interactions of your customers and prospects with your sales team. If well organized, they accumulate a ton of information to learn more about them, but especially on how to market them accordingly. **However, a CRM can not identify a customer who is not already somewhere in your database.**

This is where the CDP shows its biggest advantage. Whether you are collecting data from a loyal customer or an anonymous new visitor, a CDP can identify them. This ability is what creates the unique view of a visitor's journey to client status. There are no more unidentified data points for anonymous visits; they are all counted and identified.

More in detail

CRM focuses primarily on customer transactions. It collects information about calls, e-mails, purchases, etc. These data points are sometimes identified separately, even if it's the same client. This occurs because a CRM is not designed to handle multiple types of data, which often duplicates customer information. For example, he identifies a contact by his customer number, while the email sending tools recognize an email address as an identifier. These aspects conflict and make it impossible for systems to recognize the same contact.

With a CDP, it's different, since the data remains unified. They are designed to handle multiple types of data from a wide range of external sources. Thus, customers are always identified, regardless of the channel used. In other words, data is never duplicated, and databases can handle multiple identifiers.



CDP versus DMP

There are 4 major differences to differentiate DMPs from CDPs. Here they are:

1. Function

The DMP is a unifying platform that collects and organizes audience data from multiple sources, including online, offline, mobile and others. This is the essence of data marketing, as the DMP stores them and allows businesses to get unique information about audiences. On the other hand, it is difficult to use them effectively, since the data are in raw form. They must be sorted and converted to be usable, at least to understand what is before our eyes. **And that's where the major difference lies with the CDP. It connects multiple platforms so marketers can use their audience data whenever and wherever they want.** Remember that a CDP must be easy to use by marketers, so it must structure the data more easily than a DMP.

2. User profiles

This second difference is quite technical, but it is also worth exploring. User profiles for DMPs are focused on customer segmentation and categorization and rarely last more than 90 days, depending on the lifetime of the cookie. Since the data is anonymous, the DMPs select based on several field values called probabilistic matches.

CDPs, on the other hand, eliminate uncertainties and perform a selection of data based on a specific customer ID, such as an email address.

Since this correspondence is consistent over a set of data, it is called a deterministic match. To illustrate these two aspects, let's say that the CDP integrates data in and offline to recognize a contact on a set of touchpoints. It also allows a predictive dimension based on the accumulated information and the identification key. On the other hand, the DMP can only provide an anonymous audience, and create segments with the data. It is the connection between the CDP and the DMP that enriches the targeting and segmentation.



CDP versus DMP

3.Types of data

CDP and DMP deal with three types of data; namely first, second and third party data.

Personal data (first source) is collected directly from individuals who have interacted, for example, with the company's website or application. They can also be generated from CRM, purchase transactions or registration for communications. Second-party data is that which is collected or purchased from another company. Third-party data is obtained from different sources. This last level is the main target of the DMP. It works with anonymous tags, such as IP addresses and cookies.

On the other hand, the CDP targets data from all levels. With this global view, he seeks to identify, at a certain time, an individual by name, an e-mail address, a postal address or a contact number.

4.Data capture

Finally, DMPs are useful for capturing generic data, such as noting when a user has visited a website, the pages they have viewed, and how long they have been on the page. CDPs can go further in this analysis to determine if the same user can be converted to a client, or to understand if content is suitable for the client based on data stored in their profile.

As a result, CDPs store historical data, making them capable of capturing customer communications, product or service transactions, and more. With this, they can use, for example, automatic intelligence to associate data with customer behavior. CDPs also have the advantage of accessing Facebook, Google ads, and more, in order to integrate data with DMPs.



CDP and DMP – Collaborative work

When a CDP is integrated with a DMP, it can provide significant value to businesses, not just to understand their customer based on first-source data, but also based on third-party data. The examples below demonstrate some of the possibilities of integrating these two systems together to provide a highly personalized experience.



Web behaviors

- Visited pages
- Geolocation / Time zone
- Source URL
- Browsers
- Operation system
- CTA / Buttons / Links clicked
- Time on a page
- Number of visits
- First / last seen
- Cross-domain cookie



Campaign activities

- Opening e-mails
- Clicked links
- Advertisements clicked
- Shared ads
- Landing page visited
- CTA and Buttons
- Shared links
- Social media actions



Démographics

- Age
- Location
- Ethnicity
- Leisure and interests
- Salary interval
- Education
- Occupation
- Industry



Stores

- Loyalty card
- Average basket
- Purchased products
- branches
- Specials
- Nbr of visits
- Return and refund



App and IOS

- Usage statistics
- Screens visited
- Actions carried
- Purchases made
- Location data



Conversations sociales

- Shares
- Likes
- Followers
- Profile Info
- Shared links



Call center

- Name
- Contact info
- Purchased products
- Tracking interactions
- Complaints
- Suggestions
- Information request



CDP and known marketing tools

A common question facing marketers about CDP is how it can be integrated with other tools that are now recognized as essential to marketing (automated mkg, sending emails, etc.). Here's how:

Magnitude of data and data sources

It is no longer enough to only collect data on a few channels in order to trigger a series of automated actions. On the contrary, we must move to the concept of CDP, which extracts data from all sources of an organization. Connecting this is the breadth of data that can move marketing to the next stage.

Transform data into information

The current tools aim to manage campaigns from the data you have collected and stored in one solution. The goal of the CDP is to generate insight **on a set of tools**. It also aims to create targeted campaigns, without the marketers having to interfere too much in the process. It's also about taking advantage of the data and using it to inform strategic decisions.

Real-time customization

Automated marketing has successfully established links with certain channels, primarily email, to conduct targeted campaigns. On the other hand, the objective of the CDP is to offer real-time customization, on all the channels connected to it.

Transform multiple products into one

With all this, a CDP can replace an automated marketing platform, an email platform, landing page creation, monitoring, but also a badly or untapped marketing database. It's really a global tool that improves marketing intelligence on many levels!



Other systems

Data Warehouse (EDW)

Used to store large amounts of company data (in a centralized approach) from multiple sources. This data can come from sales, marketing, purchasing, finance, and any other department.

An EDW helps organizations store and manage data so that it is easier to find, access and use.

The main difference between CDP and EDW is size, and its purpose. Data warehouses store a lot of information, making them expensive, information-centric (and IT-driven) projects. They are designed for analysis aimed at the entire company. A CDP only targets customer data and must be operationalized by marketing teams.

Tag Management Systems (TMS)

A TMS facilitates the implementation and management of tags with corporate websites and other digital properties. These are used to track, analyze and recognize the customer.

Thus, a TMS establishes a foundation for the collection of digital data.

A TMS is not designed to collect clean customer data. In this respect, it is difficult to obtain a view of the customer that is clear and can be used.

The CDP is then very different from the TMS, and these two tools can be combined to improve the customer experience, based on the data collected, assembled and cleaned.

Enterprise Resource Planning (ERP)

ERP users focus on the process and logistics of the entire enterprise. ERP enables the rapid sharing of standardized information in all departments, be it production, accounting, R & D, etc.

The goal of an ERP is the automatic reporting of anomalies in connected systems.

For example, a problem in one area of the organization will automatically create alerts in the other affected area (s). This way of functioning can be implemented both in reactive and predictive mode (which is desired). This allows the company to focus on data rather than operations, since ERP provides a method for streamlining business processes.

Master Data Management (MDM)

A Data Hub (MDM) is a set of processes and technologies designed to ensure data reliability and accuracy for the entire enterprise.

It provides a single point of reference to ensure that databases are shared by the entire organization.

Although an MDM can unify the data to create a unique client repository, it is not designed for the needs of marketers or for the exclusive capture of customer data. In addition, unlike the CDP, MDM does not easily connect to marketing delivery systems. However, it can be a source of information that feeds your CDP.



The benefits of a CDP

IMPROVING DATA MANAGEMENT / COMPLIANCE

Many marketers are currently responsible for synchronizing data from many sources, organizing it to provide insights into customer behavior. A CDP automates this process, **allowing marketers to focus on creating the best possible marketing strategies, supported by the data itself.** In addition, a CDP can orchestrate these campaigns on key customer information, such as:

- Preferences and consents
- Unsubscribe
- Usage Tracking
- Customer journey
- Unique identifier by contact

It ensures compliance with current laws, which greatly facilitates the work of marketers.

IMPROVING THE OPERATIONALIZATION OF MARKETING

A CDP provides complete and accurate customer profiles that facilitate customer engagement. It organizes raw customer data in a meaningful and transparent way, **enabling marketers to make informed decisions.** In addition, a tool like this reduces redundancy and maximizes the effectiveness of any marketing strategy. Finally, marketers increasingly want to personalize the customer experience in real time. A CDP can provide the appropriate capabilities to segment and act on the right audience based on their behavior.

- Best customer acquisition
- Reduce customer attrition
- Increase in the "Average Order Value"
- Increased marketing commitment
- Reduce costs through more efficient data analysis
- Human errors at the data processing stage can be mitigated



The benefits of a CDP

INTEGRATING DISPERSED ORGANIZATIONAL SYSTEMS

Rather than working with a computer-based database, a CDP allows **marketers to take advantage of the data that will really serve them, so they take power over it.**

This avoids constant come and go with IT teams to access the data. The connection, often by API, is easy and can be done directly in the platform with a minimum of technical knowledge.

Finally, it is also a tool that can be used for:

- Analysis and research;
- To take decisions;
- Build and run campaigns;
- Create reports, and more!

UNIFYING THE CLIENT BRAND EXPERIENCE

By associating and analyzing consumer behavior via different channels, companies can obtain meaningful information about consumers. **This allows marketers to experiment, test various hypotheses and get better results, making marketing teams more agile.** On top of that, done is the time when customers would interact with a business through a single linear channel. The opposite is true, forcing brands to better understand customer behavior across multiple channels to implement omnichannel campaigns.

- Good message, at the right time
- Create targeted and personalized communications
- More consistent and satisfying customer experiences

Use case and implementation



Do you need a CDP?

The first question, and certainly the most important: do you need a CDP? To answer it, here are 3 existential questions to ask yourself as director / manager / marketing VP.

- **Does your industry dictate doing data marketing (to the customer)?**

Marked by large customer segments, a rapid evolution of needs and customer habits, an internationalization of the brand by external competitors or by new export markets, a strong competition that steals the percentage of customers, etc.

- **Will centralizing data in one place allow you to be more effective in your marketing / sales efforts?**

Do you have difficulty tracking the performance of your campaigns, or orchestrating targeted marketing campaigns because you do not have access to the data that interests you?

- **Est-ce que la quantité d'outils marketing est trop grande, ce qui augmente vos temps d'opérationnalisation ?**

Do you orchestrate your marketing campaigns in more than one tool, through an email platform, landing page creation solution, SMS sending, etc. ?

If you answered yes to more than one question, you may benefit greatly from the benefits of a CDP, and for that purpose, the following pages may be of interest to you!



Choosing your CDP

Hop there! You are going a little fast, because before choosing the technology itself, you have many steps to take. Indeed, you hopefully understand that a CDP must have a series of tools to operate in a MarTech environment that supports and enriches it. To get there, you need to plan this environment based on what you have and don't have. Here are some ideas to reflect on.

Business

Does your organization fully integrate a Data Centric vision?

Process

Which marketing processes (or closed to marketing) do you want to facilitate with a CDP?

Technologies

What technologies are associated with these processes and should be integrated into the CDP? (Mapping)

Data

What data from these technologies should you transfer to the CDP? (Mapping)

Clients

Who are your personas, and what are their points of contact to consider? (Customer Journey)

Orchestration

What is the list of automated and customized marketing campaigns you want to implement? (simple to complex)

Skills

What strategic, operational and technical skills will have to be acquired by your team to support a data vision?

Performance

What KPIs do you need to put in place to enrich the CDP and analyze the performance of the previous points?

FOR THOUGHT



Run a mapping of your processes and technologies

It is always interesting to visually present connections between systems; the data that is collected in these systems; the data transfers that are made; transfers that are not made but must be made, etc. To do this, we suggest that you map these relationships into a centralized tool that is accessible to people who might use it.

At Dialog Insight, [we use Miro](#), which greatly facilitates this task.



Develop User Stories (Use case)

Then build **user stories** to facilitate the implementation of such a solution for each of the previous points.



*Short, simple, descriptions are presented from the point of view of the person who wants the new feature, usually a user or client of the system. They usually follow a simple pattern: **As a <user type>, I want <a goal> for <a reason>.***

EX. : Appuyer le processus de vente, par le marketing, à l'aide des informations du CRM

Process

- As Marketing Director, I would like to support the sales team in tracking prospects so I can help in closing them with marketing content.

Technologies

- As Marketing Director, I would like to integrate CRM data into CDP to get a complete view of prospects and new customers.

Data

- As a marketing coordinator, I need the customer number in the CRM to flag a contact as a prospect.

Clients

- As a Marketing Director, I need to know the most popular points of contact for a prospect to enrich the personas.

Orchestration

- As a marketing coordinator, I want to be able to trigger a thank-you email scenario on a prospect who converts to a customer.

Skills

- As a Marketing Director, I need my team to understand how to use CRM data to build effective communication scenarios.

Performance

- As a marketing coordinator, I need to create a report on the number of new customers who have taken actions in the emails of my scenarios.



Criteria for evaluating a CDP

Once your strategy is in place, and before you even talk about implementation, you need to find a trusted partner. As a result, the next step is to evaluate vendors to determine which one is best for your business and your specific needs. This is vital since your CDP will be an integral part of your long-term technological infrastructure, so it is crucial that it meets your expectations, in addition to being flexible and scalable. An effective way to get an idea about this type of product is to see if the potential supplier offers proof of concept (POC). It will be easier to assess the magnitude of the task, the costs, the timelines, as well as the result.

In any case, here are some points that should be part of your thinking:

1. **Connectivity**: What is the capacity of the CDP to ingest data from different systems (plug-in, API, automated import / export, etc.)?
2. **Unique Customer Repository**: What are the different methods around data cleanup?
3. **Unique Identifier**: Does the CDP unify the data to create the 360 profile of the contact?
4. **Segmentation**: What are the options for dynamic and hyper-advanced segmentation?
5. **Orchestration**: Which communication channels are connected to or integrated with the CDP?
6. **Reporting**: What integrated or connected methods can be used to analyze campaign results?
7. **Security**: Does the CDP include rules to ensure a high level of security of your data?



Pricing and implementation

When developing the integration plan of your CDP, it would be wise to plan it in several phases, according to the deliverables needed. Typically, an initial phase of integration, depending on the size of the data to be migrated, can take between a few weeks (about 2) to a few months (1 to 2). Obviously, the more data sources you connect, the longer it will take. **There are no absolute rules for an integration period**, as this will vary depending on whether you are connecting a CRM, a Data Lake, and so on. Additional components can also create complexity, and thus lengthen the implementation period, including data cleansing, unique business rules and merging identifiers, data attributes, custom calculations, customization models and machine learning that may need to be created.

As for the cost associated with implementation, **it also varies depending on the scope of the project, the size of the company, and obviously the supplier who establishes its own prices**. In all cases, several costs are recurrent, and are visible in the following table. These will have to be evaluated on your side and can serve as a basis for future discussions.

Evaluation costs	Licence cost	Implementation cost	Ongoing cost
Proof of concept	Monthly or annual license, by module / purchased products	Implementation and custom projects	Data storage and data quality
Search time	Derivatives <ul style="list-style-type: none">➤ Tag manager➤ Accommodation➤ # of sendings➤ # of contacts➤ Etc.	Number of connections to external systems	Reporting (export, BI, etc.)
	Exceedings	Set up - Business rules	New system connections

Conclusion



To conclude

To conclude, let's say that the craze surrounding the CDP is just beginning. There is an estimated \$ 1 billion in revenue to be gained in 2019 toward this product category.

On the other hand, keep in mind that no technology, not even a CDP, is the definitive answer to all your marketing problems. Our point of view is nevertheless clear: the unified vision of the customer, combined with a multichannel orchestration of the customer journey, and an enrichment of customer knowledge can help companies achieve personalized and targeted marketing.

From this perspective, it is only with a unified decision layer, supported by customer data, that marketers can standardize the customer experience in an omnichannel universe.

Hoping that you know more about this tool, do not hesitate to contact us for any question!

CDP Institute, 2019 Survey

« Companies with a CDP deployed reported higher martech satisfaction than companies without a CDP. »



About Dialog Insight

One of the most effective ways to achieve your growth goals is to take control of your customer data to maximize your marketing efforts.

At Dialog Insight, we believe that each of our customers is unique and that their needs are specific. Therefore , we have developed a platform that adapts to your changing context. On the one hand, we provide you with a unified platform that centralized customer database, campaign orchestration tools, and detailed analysis of your performance. On the other, we offer strategic support services aligned to your needs.

Whether you're looking to increase sales or engage your customers, leverage customer insights you've gathered over time. You will communicate in a more relevant, coherent and personalized way than ever before. Make every point of contact an opportunity to offer your customers a brand experience beyond their expectations.

With Dialog Insight at your side, you are more than ever the master of your success.

