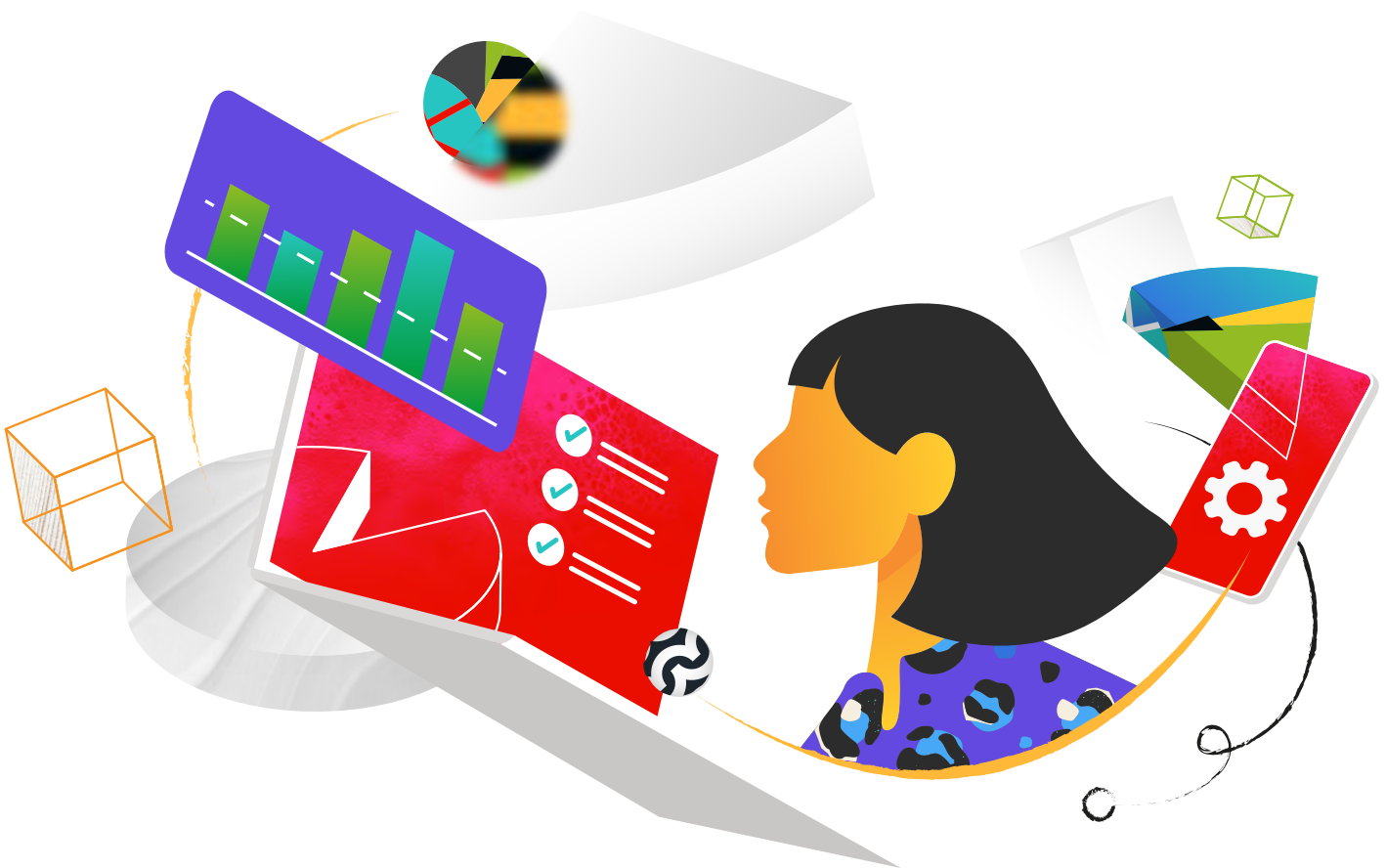





GUIDE

# The anatomy of a future-proof CDP.

Discover how the right CDP can deliver exceptional customer experiences now—and in the future.





## It's not just the product, it's the experience.

Customers aren't just buying technology—they're buying an experience. And they want an experience that lasts longer than the initial transaction. After all, buying technology isn't like buying a pair of shoes. Your customers don't just walk away with a product and that's the end of it. Their purchase is just the beginning of the relationship.

Whether you're selling a high-ticket B2B enterprise platform service or inexpensive laptop computers, technology purchases almost always require ongoing support to install, integrate, use, or maintain. And that means—more than anything—customers want to feel like they're getting an exceptional and highly personalized customer experience.

But the only way to deliver these types of real-time, personalized experiences that customers have come to expect is by fully harnessing your customer data so that you have a unified view of every customer in real time. And this is where a customer data platform (CDP) becomes essential, especially in a cookieless future.

Whether you already have a CDP that's not living up to your expectations or won't be able to stand up to your future requirements, or you're embarking on the journey of selecting a CDP for the first time, this guide will help you take the next step. We'll cover:



What a CDP is and why you need one



How CDPs create great customer experiences



What capabilities are essential in a future-proof CDP

Armed with these insights, you'll be able to determine the right CDP for your organization. A CDP that will support your data strategy and allow you to create differentiated, real-time customer experiences now and in the future.

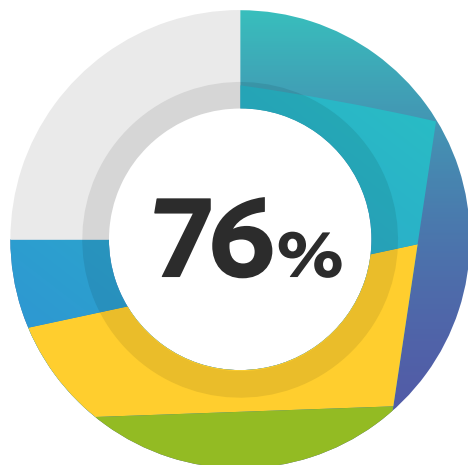
# CDPs: The heart of your martech stack.

To deepen the relationship with your customer, you need to provide the right experience at the right time. But that's only truly possible when you have the data to identify, attract, and nurture your prospects and customers. In fact, the majority (59%) of high-tech businesses in our *2022 High Tech Digital Trends* report indicate that the number one technology investment priority is data and insights (which includes data analytics, data management, and customer data platforms).

While you may have already made significant investments in data, as many high-tech companies have, it may not be delivering on its promise. If your data is fragmented in different data systems and platforms, getting a complete view of the customer is difficult to do. But because so many organizations struggle with data silos, it's little wonder 58% of marketers in a MarTech Today report said the leading obstacle to marketing success was getting a single view of the customer.

Even if you stitch the data together from these systems with spreadsheets, it's time-consuming. There will also be a significant lag from insights to action. But as a high-tech marketer, you can't afford disjointed experiences. Especially when 76% of customers still expect connected experiences even though they prefer to use different channels to communicate with brands, according to MarTech Today.

What's more, as a high-tech brand, customers have high expectations for you. They assume you'll not just be good at collecting and assembling insights-based data, but also that you have the best use of data. And your customers absolutely expect that you should be using technology and data proficiently to deliver connected, real-time experiences with them across the customer journey—no matter how many channels or devices they're on.



**76% of customers prefer to use different channels to communicate with brands, but they still expect connected experiences.**

Source: MarTech Today





## Top 10 CDP use cases:

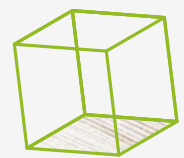
A unified customer data profile that gives you the context at every interaction to meet your customers' expectations requires unified data across systems, channels, and teams. This is a CDP's main job.

CDPs connect customer data streams, including data from CRM and ERP systems as well as behavioral, transactional, financial, and operational data. This allows marketers to build an up-to-date and real-time customer profile so that they can deliver true personalization and connected experiences across the customer journey. By creating a "system of record" for actionable first-party customer data, CDPs minimize errors and reduce data redundancies, allowing data to flow more quickly into and out of marketing automation platforms, email service providers (ESPs), customer relationship management (CRM) solutions, and other martech systems.

The right CDP not only makes delivering real-time personalization substantially easier—it also sets you up to discover data-driven opportunities. And because a CDP connects data systems across your company—from marketing and customer service to call centers and payment systems—CDPs can also support non-marketing teams, such as sales and service operations. For example, combining web engagement data and call center interactions can expose new avenues for self-service, resulting in call deflection and cost savings—thus, making CDPs the vital part of not just your martech stack, but also your data strategy and data foundation.

1. Achieve a 360-degree view of the customer
2. Gain actionable insights
3. Target customers based on behaviors
4. Increase customer acquisitions
5. Segment your audience
6. Enable consistent and personalized experiences in real time
7. Increase the lifetime value of customers
8. Optimize marketing campaigns for greater ROI
9. Use propensity modeling to predict particular actions
10. Ensure compliance with privacy regulations

For more in-depth use case information, see the Appendix.



# How CDPs support the best customer-led experiences.

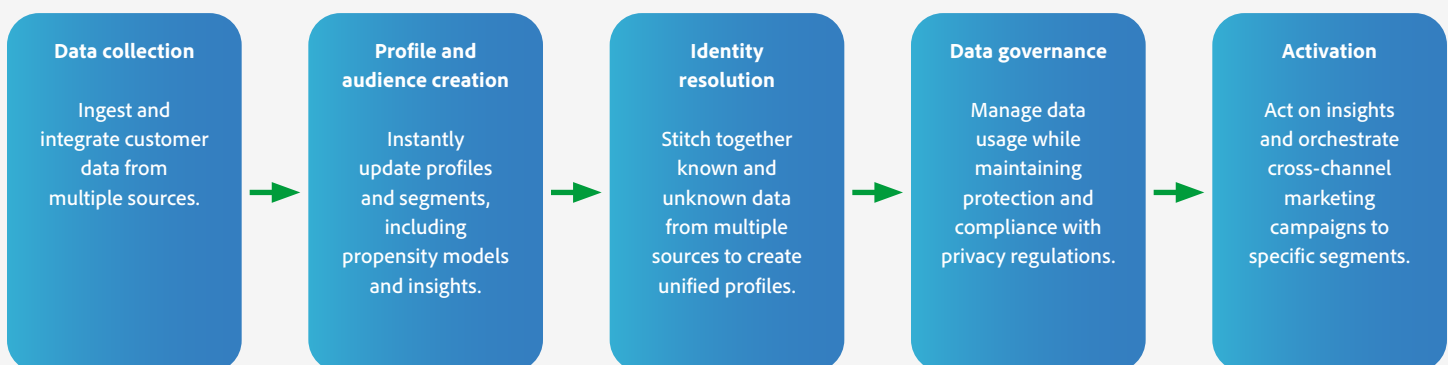
A great customer experience has several components, starting with customers feeling like the brand understands their challenges and needs. To meet this expectation, you need to show that you know the industry they're in, the size of their business, their existing infrastructure, where they are in the sales funnel, and the specific challenges they are facing based on their demographics and behaviors. A CDP helps you unify all this relevant data into actionable customer profiles.

You also want to make it easy for customers to onboard and learn about your products, understand their benefits, and find the right fit for themselves or their business. Building this type of experience means customizing offerings and building packages according to customer needs, so the experience goes beyond personalization to providing value. Here again, the CDP enables you to deliver customized content and offerings based on a customer's unique profile.

Finally, you want to offer the customer something that is relevant and personalized to their needs. Look at [Western Digital](#). Rather than present the same web pages and product recommendations to everyone, the company now delivers custom messages and highly targeted web experiences based on the specific buyer and what's in their shopping cart. For example, if someone is purchasing a portable SSD drive, an upgraded option or protective case might appear as a recommended add-on. Western Digital is displaying products and services that benefit its customers while driving revenues for the business.

A CDP supports all these components of a great experience by making it easier to identify what customers need at a specific moment in the customer journey. EY, for example, has used its CDP to bring together multiple sources of data to gain a single view of its audiences. EY reports teams now have visibility into the status of each client or prospect, on both an individual and an account level, and can nurture them through the B2B sales cycle in the most appropriate way.

## How CDPs support a connected customer experience.



For more detailed information on these attributes of a CDP, see the Appendix.

# Key capabilities of a future-proof CDP.

While almost every CDP follows the framework of collecting data, creating profiles and audiences, resolving identities, governing data, and acting on insights, this does not mean all CDPs are created equal—or can deliver a fully connected customer experience with real-time personalization across the entire customer journey. Some CDPs focus more heavily on identity management, analytics, and data orchestration. Other CDPs are more finely tuned for B2B, B2C, or direct to consumer (DTC)—or even a specific industry or type of business.

As a high-tech company, your needs are often unique in that you may serve both B2C and B2B customers. You may need, for example, to use a CDP to identify buyers, create buyer segments, and deliver targeted content for your B2B account-based marketing strategy. You may also want to identify consumer buyers that are part of an organization that you are targeting. Even if you don't serve both B2B and B2C today, many companies find that having an agile infrastructure that supports changes in business models to be an advantage. So, it is a distinct benefit to have a CDP with a single infrastructure that addresses both the B2B and B2C route to market and can be successful in both approaches across multiple industries.

You also want to be mindful of “point CDPs,” which are CDP solutions designed to serve just one primary purpose like the storing of known and unknown data. These point CDPs don't have the full spectrum of capabilities and may not be able to address the evolving needs of your organization. They also don't offer combined B2B and B2C capabilities, which means you would have to invest in multiple CDPs—creating more data silos, not fewer.

To ensure the CDP you choose has the technical capabilities to support top-notch customer-led experiences now and in the future, look for these capabilities:

Key capabilities	What to look for
Real-time streaming data ingestion	Look for a CDP that streams and ingests data in real time so you can see your customers in the present moment and use those insights to act in real time because the future of marketing is trending fast in this direction—and you don't want to be left behind.
Modern, native-built CDP	Select a CDP purpose-built from the ground up. Many CDPs in the marketplace are cobbled together from disparate technologies, and some are created by young and unproven organizations. Because your CDP handles one of your company's most important assets—your customer data—you want a modern, natively built CDP from a reliable source.
Unified people and account profiles	Look for a CDP that can bring together the known (personal identifying information or PII) and unknown (pseudonymous) person-level data with B2B account data in a single profile. This provides a complete understanding of the customer within and across lines of business.

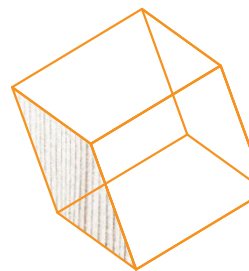
Key capabilities	What to look for
Robust, native data governance tools	Find a CDP that allows you to manage customer data and ensure compliance with regulations, restrictions, and policies applicable to data use. It should also allow you to define usage policies, categorize your data based on those policies, and check for policy violations when performing certain marketing actions.
Real-time data activation	A future-proof CDP should function in real time, both at the ingestion and activation phases. Both pieces are critical. Real-time data ingestion ensures your customer profiles are always up to date. Without real-time data activation, you cannot deliver experiences based on incoming changes to your customer profile.
Easy for marketers to use	The ideal CDP should be purpose-built for marketers, with the interface, tools, and workflows structured to fit seamlessly into a marketing context.
Scalable, flexible, and extensible	To ensure your CDP can handle the complexity of your business and scale with you, your CDP should integrate seamlessly with your existing marketing and advertising technology stack. It should have a modern cloud-based architecture that supports both B2B and B2C models—making it easy to expand adoption across use cases and departments while not putting additional burden on IT. It should also be built from the ground up to ensure scalability and offer prebuilt integrations with sources and destinations as well as provide the tools to build custom connectors to internal systems.

For more detailed information on CDP capabilities, see the Appendix.

## Choose a CDP that can grow with you.

As your company matures in its use of a CDP, the opportunities to use your customer data for marketing and customer relationship building—and the types of experiences you can deliver—will also mature. For example, you may begin by simply creating a unified view of the customer. Once you have that capability, you can then use those unified profiles to deliver the right message or experience at the right time to the right person. Eventually, you can even incorporate sophisticated artificial intelligence (AI) and machine learning (ML) models that allow you to predict customer purchases and offer recommendations.

But this maturity and growth in your CDP use is only possible when you ensure that the CDP you choose has the capabilities to grow with you. This is why it's important to find a CDP with everything you need to deliver exceptional experiences across the customer journey while being scalable, flexible, and extensible for future use case opportunities.



# How Adobe can help.

The award-winning Adobe Real-Time Customer Data Platform, powered by Adobe Experience Platform, allows you to understand and connect with B2B and B2C customers and prospects with simplified and centralized management of complete marketing profiles. Purpose-built for marketers, it offers the full set of capabilities needed to deliver one-to-one personalization at scale, including streaming data collection from all of your systems, a patented data governance framework, real-time activation across channels, and AI or ML for both B2B and B2C RTMs.

**Use Adobe Real-Time CDP to create and deliver uniquely personal, relevant experiences across your entire customer base in the moment, every moment.**

[Learn more](#)

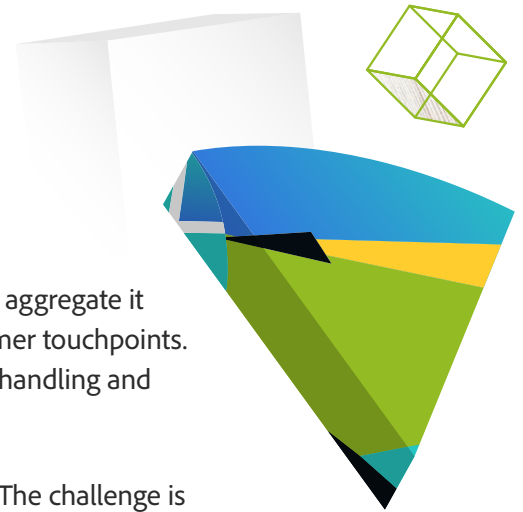




# A guide to building a robust CDP request for proposal.

The defining features of a CDP are the ability to source data from multiple sources, aggregate it into a single profile, and segment and orchestrate activation across multiple customer touchpoints. Historically, CDPs have fallen into three categories of focus: 1) data storage, 2) data handling and management, or 3) data analytics, visualization, and activation.

With the evolution of CDPs, there are now solutions that span all three categories. The challenge is selecting the CDP that is right for your organization. The purpose of this Appendix is to provide you with a framework to understand and prioritize CDP capabilities to help inform your business case requirements and build a robust RFP.



## CDP characteristics and capabilities

Category	Characteristics	Capabilities
Data collection	<p><b>Data management system:</b> Includes a unified and persistent database that can be accessed by other marketing technology. Can ingest and integrate behavioral, transactional, structured, and unstructured data from multiple sources into a single repository that supports the building of a unified profile.</p>	<ul style="list-style-type: none"> <li>• Capable of real-time data (including on-site, device, offline interactions, and automated personalized workflows and advanced segmentation data) exchange with any platform or solution that is capable of real-time data transfers.</li> <li>• Ability to integrate with mobile apps and websites to gather and analyze information about customers and ingest into the platform.</li> <li>• Provide an elastic, scalable environment that can easily adapt to an ever-increasing volume of data that needs to be analyzed. Serves as a fully open and extensible platform that is built on APIs, allowing for connection to nearly any system.</li> <li>• Based on a unified service-oriented architecture (SOA) which uses open standards (XML, JavaScript, SQL, and so on) that can be easily deployed in different configurations to meet scalability and redundancy requirements. Also provides the ability to extend the platform with custom code.</li> </ul>
	<p><b>Native integrations:</b> Has the ability to set up new data integrations without SDKs or additional tracking codes.</p>	<ul style="list-style-type: none"> <li>• Must have prebuilt source connectors.</li> <li>• Must have prebuilt destination connections.</li> <li>• Ability to build custom connections with internal or partner systems.</li> <li>• Designed and built using core principles of API-first development to allow partners to build their own data ingestion and egress capabilities and developers to build custom UIs to support specific task-driven use cases. Also provides self-service tooling to allow opportunity to build own integrations.</li> </ul>
	<p><b>Ingestion:</b> Loads data from multiple customer touchpoints in real time.</p>	<ul style="list-style-type: none"> <li>• Ability to collect and process real-time data—tens of millions of events per second—from multiple sources and then organize the data.</li> <li>• Ability to ingest known and anonymous data from multiple enterprise sources.</li> <li>• Ability to automate ingestion from enterprise data warehouses, data lakes, and other big data systems.</li> <li>• Ability to ingest data via batch ingestion at any frequency and streaming ingestion on a real-time basis.</li> <li>• Ability to ingest data from third-party sources.</li> <li>• Flexibility to import existing or predefined audience lists into the platform for further segmentation and reporting analysis.</li> <li>• No hard limitations on the number of attributes, customer records, segments, or data volumes that can be ingested into the platform.</li> <li>• Support structured and unstructured data.</li> <li>• Ability to standardize data coming in from multiple sources or systems (e.g., standardize different date formats)</li> </ul>

Category	Characteristics	Capabilities
Profile and audience creation	<p><b>Segment management:</b> Offers the ability to instantly update profiles and segment them in real time into specific groups to enhance targeting and activation. Also offers machine learning and artificial intelligence services that provide predictive segmentation.</p>	<ul style="list-style-type: none"> <li>Ability to have a tailored data collection strategy that captures user-level data signals and then segments customers into multiple segments based on static and dynamic attributes like demographics, behaviors, and other categories. (e.g., days to expiration, type of products owned, tenure, number of calls to customer support, and so on)</li> <li>Ability to create segments based on any profile and event data available.</li> <li>Utilize dynamic segmentation instead of static segmentation to solve the scalability problems marketers traditionally face when building segments for marketing campaigns.</li> <li>Able to define segments by attributes using standard Boolean operators like AND, OR, and NOT, and also operators such as "contains," "starts with," and "does not exist."</li> <li>Flexibility to use rules to nest audience segments (e.g., segments within segments).</li> <li>Ability to define and manage suppression, exclusion, and priority lists at both the global or general level or campaign level. Also, customer preferences may include permission to contact on specific channels or for specific purposes. Customer preference data must be made available to the platform in real time from any customer-facing preference center applications.</li> <li>Ability to determine segment membership in batch or streaming modes, or on the edge to enable same page or next page personalization use cases.</li> <li>Ability for marketers to identify and size a customer segment or audience.</li> </ul>
Identity resolution	<p><b>Stitching:</b> Stitches together customer data (both known and anonymous), such as first-party cookies, email addresses, phone numbers, purchase data, and other behaviors, and matches them to create a single comprehensive profile record in near real time.</p>	<ul style="list-style-type: none"> <li>Ability to stitch together several different identities from disparate sources (using current and historical data) and create a single comprehensive view of your customers in near real time.</li> <li>Support storage of all events related to anonymous IDs. If anonymous IDs are stitched to a known customer profile, the platform will merge both the profiles and create a real-time view of that user across known and unknown activities—incorporating historical behavior from both identities into a single known user.</li> <li>Ability to track anonymous user behavior and then associate that data with a known or identified user as they move through the sales funnel and customer IDs become available. This must be possible across devices and different channels.</li> <li>Ability to unify customer records and data using deterministic matching.</li> <li>Provide a way to standardize various datasets into one unified profile of customers using custom mappings from existing data.</li> <li>Utilize an identity graph to map different identity namespaces, providing a visual representation of how your customers interact with your brand across different channels.</li> <li>Equipped to manage identity namespaces, such as email, mobile number, device IDs (IDFA, GAID), analytics cookie ID, and so on, along with supporting by default key DSP Identities, such as Google ID, AppNexus ID, Trade Desk ID, and so on. Also equipped with the option to include first-party identifiers, such as CRM ID, Loyalty ID, internal GUID, or "Golden ID."</li> </ul>
	<p><b>Profile generation:</b> Ability to define profile merge policies to make sure preferred profile data is used.</p>	<ul style="list-style-type: none"> <li>Ability for profile merge policies to run in real time.</li> <li>Ability to set up merge profile policies based on organization-defined needs.</li> <li>Ability to support multiple merge policies to create multiple views or customers for different uses.</li> <li>Ability to support and identify "many-to-many relationships" between people and accounts (e.g., one person can work at multiple different accounts and each account can have multiple people work at it).</li> </ul>
Data governance	<p><b>Privacy regulations compliance</b></p>	<ul style="list-style-type: none"> <li>Ability to automate compliance with data privacy regulations, including CCPA (California), GDPR (European Union), LGPD (Brazil), the New Zealand Privacy Act, and PDPA (Thailand).</li> <li>Ability to support access and delete requests and ability to send "do not sell" or opt-out flags via batch or streaming APIs to be processed against established profiles in real time.</li> <li>Ability to update or correct data when requested by a data subject (Right to Rectification).</li> <li>Provide a team dedicated to the issue of global privacy and data rights management to ensure that the latest and most up-to-date privacy best practices are in place.</li> </ul>

Category	Characteristics	Capabilities
Data governance	<b>Built-in data protection</b>	<ul style="list-style-type: none"> <li>• APIs must be authenticated and authorized using standards such as OAuth and JSON web tokens (JWT) to maintain the security of applications and users.</li> <li>• Provide a way to add metadata around data usage, sensitivity, and PII handling. Provide a data catalog that keeps track of what data is available in platform.</li> <li>• Provide configurable data security and encryption in transit or at rest.</li> <li>• Be governed by a comprehensive set of documented security processes and be subject to numerous security audits to maintain and improve quality.</li> <li>• Ability to update records, delete records, and create “time to leave” parameters based on dates.</li> <li>• Ability to define how long to store historical transactions and to store raw data indefinitely.</li> </ul>
	<b>Built-in compliance features</b>	<ul style="list-style-type: none"> <li>• Include features that provide guardrails on what data can be used for activation purposes across different customer engagement touchpoints.</li> <li>• Provide features such as opt-in object to control whether and which solutions can create cookies on web pages or initiate beacons, based on end user consent.</li> <li>• Has prebuilt integrations with consent management solutions like Evidon, OneTrust, and TrustArc, and the ability to integrate other solutions through an extension.</li> </ul>
	<b>SSO (single sign-on)</b>	<ul style="list-style-type: none"> <li>• Support the federated ID for SSO to provide the ability to leverage an existing identity provider for authentication. Also support legacy LDAP-compliant, SAML-compliant, and SSO systems.</li> </ul>
	<b>Role-based permissions</b>	<ul style="list-style-type: none"> <li>• Admins are able to control how different roles interact with customer data.</li> <li>• Admins are able to manage and restrict usage.</li> </ul>
Activation	<b>Orchestration:</b> Unifies the orchestration of multiple interactions and channels within a single tool to eliminate fragmented and inconsistent targeting approaches.	<ul style="list-style-type: none"> <li>• Allow real-time profile orchestration for cross-channel marketing campaigns powered by data from the CDP.</li> <li>• Ability to create a single audience within the platform and export or use it for activation across multiple channels, including email, social media, and more.</li> <li>• Ability to orchestrate omnichannel campaigns in real time for channels such as mobile, SMS, transactional and promotional email, digital, and social media.</li> <li>• Ability to create and manage customer journeys within the platform.</li> <li>• Ability to set up real-time triggers based on customer behavior.</li> </ul>
Other		<ul style="list-style-type: none"> <li>• Provide an intuitive interface that allows a non-technical user to easily use the platform, including enriching user profiles, building audiences, access and create visualizations in dashboards, and generate reports.</li> <li>• Ability to create and configure custom dashboards which are enabled by real-time reporting. Dashboards must be easy to create and configure, and no limitations should be placed as to the number of dashboards or the number of reports that can be added to a dashboard.</li> <li>• Provide a customer support portal that lets your users log cases or FAQ directly into a support database and then view and update it over the web at their convenience. Offer a feedback framework that includes dedicated sessions to review status or timing of bugs, enhancement requests, and visibility on product roadmap. Provide a customer experience portal to access learning paths, video enablement, product documentation, community or peer forums, and a feedback panel.</li> <li>• Provide both on-site and web-based training. Provide a comprehensive set of documents for training and ongoing learning, including user guides, videos and tutorials, system manuals, support guidelines, and training documentation. Offer curriculum-based courses for product training.</li> <li>• Provide multiple support models depending upon requirements. Provide 24x7x365 unlimited access to technical support regardless of customer location or region.</li> </ul>

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