



Customer data platform buyer's guide.

Five must-haves for your customer data platform (CDP).



✓ Collect data



Tiktok: Working from home must-haves



Search: Noise cancelling headphones



Facebook: Headphones that make life better

560k

High propensity score



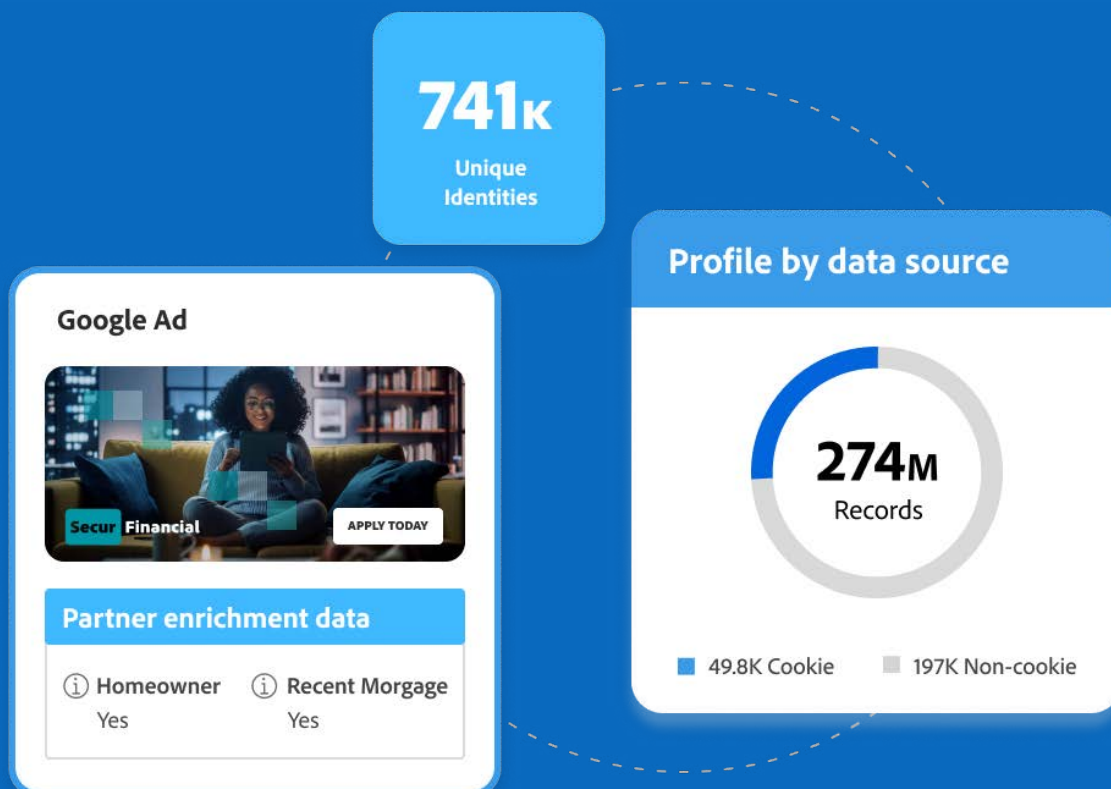
Create segment



Add to cart: white headphones

Data and personalization are at the center of nearly any customer engagement. You need to track your user interactions, compile them into a single database of unified profiles for easy access, and then use that data to drive personalization in future interactions. But to manage that data and activate it on all your digital channels, you need the right platform.

In this guide, we'll look at five must-have capabilities of a customer data platform (CDP) so your organization can make an informed decision when comparing different solutions.



The five capabilities you need in your CDP.

1. Unified profiles—connect data to form a consolidated, real-time view of your customer.

The number of ways customers can interact with your brand is increasing faster than ever. That's why you need a CDP that can compile critical customer interactions into actionable unified profiles, to give your business a view of who your customers are, no matter where they are engaging with your brand.

75%

of customer experience (CX) leaders aggregate data across channels and business units into a single customer profile, which leads to a more comprehensive understanding of their audience.

Source: Forrester

Why unified profiles are a must-have.

The amount of data and data sources that enterprise companies deal with can be overwhelming. A CDP should be able to link interactions from many sources—including all your online channels and offline engagements—so you can fully understand your customer.

Customers will interact with your brand in a variety of ways. Whether it's through social media, email, in app, on your website, or in person, your business needs to be ready to gather key information about customers and their preferences and make it ready to act on so your next interaction with them can be even more meaningful.

Team needs

Key CDP capabilities

A way to identify or track unknown customers

Customer recognition across known and unknown devices

More organized data management

Standardized ingestion and formatting for all your customer experience data

Unified customer profiles

Automated data ingestion and compiling to create complete customer profiles

Real-time data utilization and activation

Instant activation of data for recommendation and personalization algorithms

2. Audience activation—make your customer experiences relevant and real-time across channels.

Collecting data is straightforward, but the value of that data lies in how you activate it to better connect with your audiences. When all your systems—including your email marketing, social media, and digital advertising platforms—are connected and can benefit from all your audience data, it improves the effectiveness of all your channels. Each new customer engagement can then inform what the best next action should be for them, whether that's a special offer on your website or a targeted ad on social media.

How audience activation makes all your data more valuable.

Your customers may interact with you a few times per month or several times throughout the day. You need a CDP that allows you to track every interaction and instantly use that data to inform customer journeys for cross-channel marketing campaigns, email campaigns, targeted advertising, and other use cases.

Audience activation on different channels allows your brand to offer cohesive and seamless customer journeys regardless of which channel your customer uses to interact with your brand. Without this capability, each channel acts as a silo in which personalization efforts can only be applied to customers on that one channel. Combining audience data from all channels helps create more meaningful connections with your customers, which drives engagement, customer loyalty, and business growth.

Team needs	Key CDP capabilities
A way to integrate known and unknown data from multiple channels	Pre-built integrations with third-party platforms for seamless activation of data
One platform for planning complex, cross-channel customer journeys	Easy-to-use journey orchestration for technical and non-technical users
An alternative to third-party cookies and legacy integrations for event-level data	SDKs, APIs, tag managers, and data collection servers that allows collaboration between partners and platforms

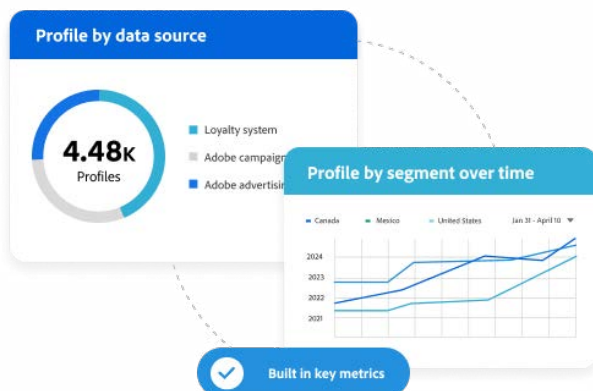
3. Audience management—empower marketers with end-to-end audience management.

Audiences are constantly evolving as marketers find new ways of segmenting existing customers. Your CDP should allow you to create, enrich, and group your customer profiles in real time. You need a platform that allows granular segmentation based on criteria like demographics, behaviors, purchase history, and preferences. The level of segmentation is a key driver for personalization at scale for enterprise businesses.

How your CDP can improve your audience management.

One benefit of using a CDP is that you can manage all your audiences from a single platform. You should look for built-in features like lead propensity scoring, look-alike modeling, AI-powered insights, and easy-to-use dashboards.

When you're able to manage your audiences more effectively, you're able to deliver relevant content to show your customers you understand their needs. And when you understand who you're talking to, you can allocate your resources towards the highest-value audiences that are most likely to convert.



74%

of CX leaders create segments using predictive models.

Source: Forrester

Team needs

Key CDP capabilities

A better way to manage audiences	Simple user interface to create audiences through segment definitions and other sources directly in the CDP
AI-powered insights available within the CDP	Dashboards and analytics with AI-powered reporting and insights into audience data
Faster ways to launch new campaigns	Pre-defined workflows for common use cases—including launching a campaign, configuring user permissions, and optimizing customer journeys
Simple ways to build audiences based on similarities	Look-alike audiences powered by machine-learning-based insights to target customers similar to your high-performing audiences or target customers
Lead scoring to know which leads are most likely to advance through the sales cycle	Predictive lead scoring powered by AI to determine which customers or accounts are worth devoting resources to

4. Cookieless marketing—adapt your marketing to a world without third-party cookies.

Third-party cookies have been slowly phasing out in recent years to help protect user privacy, so marketers must find a new way to connect relevant customer touchpoints outside their ecosystem to a cohesive view of the customer. Data-driven marketing and ad targeting aren't going away, so making sure your business is ready to adapt is key.

How your CDP can help you move beyond third-party cookies.

Even though it may be more difficult to track user behavior without third-party data, the right CDP can help you make the most out of the data you do have—while complying with data collection and usage regulations. CDPs are useful for collecting data from first-party data sources, and then combining that with data from other sources to develop complete user profiles with identity resolution.

You can leverage information from data collaboration partners, but you need the right platform to seamlessly integrate that data with your own. Look for a CDP with built-in workflows and integrations for data collaboration. When your CDP offers data collaboration tools, you can share data with other platforms—like ad networks other marketing systems—in a secure environment that still allows you to incorporate third-party data, while still discovering rich insights from your own first-party data.

Team needs	Key CDP capabilities
A way to share audiences for partner collaboration	A segment-sharing service that allows two or more users to exchange segment data in a secure, governed, and privacy-friendly way
Full-funnel marketing support without third-party cookies	Support for sharing prospect profiles and user data between data collaboration partners
Data-driven ad targeting	Pre-built integrations with ad platforms like Google Ads

5. Data and governance—respect and protect your customers with data governance tools for the enterprise.

Data privacy can be both a roadblock and an opportunity for businesses trying to build connections with their customers. More privacy means less access to your customers and their data, but it also presents an opportunity to establish your business as a trustworthy, responsible steward of customer information. Some level of transparency helps establish trust with your customers—and the right CDP can assist with that.

How your CDP improves your data security and privacy measures.

Your CDP helps with managing consent signals, data labeling, and data usage enforcement—all to keep your operations compliant with industry and regional regulations. Leading CDP solutions can automate data usage enforcement so users can't activate sensitive data on accident or in non-compliant ways. Your customers want to know which data is collected, where it's from, and what policies you have in place to protect that information.

Staying compliant with privacy laws like General Data Protection Regulation (GDPR) or California Consumer Privacy Act (CCPA) can be difficult, especially if you're trying to manage data at a granular level for hundreds of thousands of users. A CDP ensures nothing slips through the cracks.

The right data governance and protection measures help minimize risk for issues like data breaches, unauthorized access, or data loss. Robust security measures, end-to-end encryption, access controls, and regular data audits in your CDP help safeguard your business and its customers from these risks. If your business operates in multiple countries, you may need to consider a CDP that can support cross-border data transfers.

Business needs

Key data and governance capabilities

Simpler solutions for creating, managing, and enforcing data usage policies

Data usage labels for categorizing datasets and fields according to the governance policies that apply to them

Governance to avoid potential data policy violations

Alerts from the CDP whenever issues arise or when data practices aren't aligned with policies or regulations

Knowing where data comes from and which policies apply to that data

Data lineage that tracks the origin of data and how it moves through your systems, so proper governance policies can be applied

Clear customer data and privacy preferences

Consent management systems within your CDP that clearly track what permissions you've collected from which users



Read: Largest chip manufacturers in the world



Searched: Silicon chip manufacturers



Now following: Altura Technology services

Profile composition by source



- High propensity
- Medium propensity
- Low propensity

50%

of potential customers today are beyond reach for companies that rely heavily on third-party cookies.

Source: Adobe

A CDP that meets all your needs— Adobe Real-Time CDP.

According to an [Adobe study](#), 97% of leaders whose companies use CDPs report positive results—with 47% saying they've already gained more direct relationships with customers, and 40% noting a rise in customer loyalty. The right CDP for your business will empower your data and marketing teams to seamlessly compile and organize all your data and insights, and then activate that data to any of your digital channels. Without a CDP for your business, you risk struggling to connect with customers and drive the personalized content experiences they crave and expect.

[Adobe Real-Time Customer Data Platform](#) is a complete customer data management solution—from user acquisition through customer loyalty—with all the tools you need to get the most value from the B2B and B2C data you collect. Real-Time CDP also includes a patented data governance framework to help keep data secure. And with third-party data integrations and second-party data collaboration tools, you can prospect new customers, enrich top-of-funnel experiences, optimize your target audience, and more. Adobe Professional Services offers in-house consulting to help set up and tailor Real-Time CDP to allow you to get the most value out of the tool.

Learn more about how Adobe Real-Time CDP can help you get the most out of your data to drive industry-leading customer experiences.

Learn more

Sources

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