Adobe

OVERVIEW

Adobe Real-Time Customer Data Platform implementation overview.

Choosing your partners, building your team, and planning your implementation.

Profiles by source

4.21k
Profiles

- High propensity
- Medium propensity
- Low propensity

Location service

Email

A journey in every bite.

Whether your business operates in a B2B or B2C market, a customer data platform (CDP) is a powerful tool for building, activating, and maintaining customer and account profiles. As third-party cookies phase out, investing in a CDP can drive long-term success by providing multiple ways to manage your customer data.

Getting implementation right is the first step. A successful CDP implementation achieves three goals. First, it simplifies data integration and activation for ease of use. Second, it sets up governance and management of customer data to follow compliance guidelines. Finally, it puts you in position to accelerate your personalized customer experiences based on real-time customer profile updates.

This implementation guide provides an overview of how to accomplish these three goals with your Adobe Real-Time Customer Data Platform implementation. It covers what implementation looks like, who is involved, and the major phases. You'll discover how you can shorten time to value and ensure the long-term success of your CDP investment.

Five pillars of a successful Real-Time CDP implementation with Adobe.

1. Choose a partner.

2. Align your team.

3. Set goals and measure success.

4. Follow a phased Real-Time CDP implementation.

5. Establish a center of excellence.

Five pillars of a successful Real-Time CDP implementation with Adobe.

1 Choose a partner.

Some CDP vendors claim to offer plug-and-play products, but implementing an enterprise CDP isn't an overnight process. It takes careful planning and a well-thought-out, phased implementation roadmap. But you don't have to do it yourself. Real-Time CDP implementation starts with selecting an experienced partner to guide you through the process.

Adobe Professional Services is your end-to-end partner, from consultation through implementation to deployment. With thousands of successful implementations across Adobe solutions and all industries, Adobe Professional Services has the expertise to guide you through your full Real-Time CDP implementation process.

Explore the Adobe Partner Network.

Adobe also offers a robust network of specialized partners who have earned a stamp of approval for proven technical expertise, implementation proficiency, and customer success. Choose from more than 150 certified partners globally that provide services and offerings across various fields, experiences, and locations.

② Align your team.

With partner support in place, the next step is assembling the right team within your organization. The internal and external teams who deploy Real-Time CDP must have a deep understanding of the customer data you want to capture in a unified customer profile, where and how that data is stored, and the privacy rules and regulations that apply to it.

Here's a look at some of the most important roles and responsibilities.

The core team

Product owner
Oversees day-to-day operations, helping you take full advantage of all features.

Project manager
Manages large-scale implementation work for Adobe solutions, including documenting technical and business requirements and driving initiatives.

Data steward
Makes sure all activities comply with company and industry privacy regulations for personally identifiable information (PII).

IT and data engineering leaders
Apply Adobe's standard data model to all data sources and build custom integrations between applications as needed.

Other team members

Marketers
Handle data-sharing agreements with partners and manage channels where your customers interact.

Customer service representatives
Identify data from call centers, customer relationship management platforms, and other systems to include in customer profiles.

Legal and privacy experts
Advise on how you may and may not use customer data in various contexts and geographies.

(3) Set goals and measure success.

Identifying what you want to accomplish from the beginning of the implementation is essential to building your initial value requirements and assessing your ultimate success. Establishing goals and measuring success continually occur throughout each phase of the implementation process.

Here are some sample objectives, goals, and KPIs to jump-start your conversations.

Sample objectives

- Drive real-time personalization across channels, built on unified customer profiles.

- Activate marketing across multiple channels by building and sharing segments.

- Reduce reliance on third-party data by optimizing the collection and activation of first-party data.

- Scale resources by analyzing large volumes of customer data with AI.

- Respond to customer intent signals faster with workflow templates built for marketers.

- Improve data governance and data privacy management.

Sample KPIs driven by Real-Time CDP

- Number of active customer profiles

- Time to refresh customer profiles

- Number of data sources used to create each profile

- Time to fulfill data governance requests

- Time from data collection to activation

- Speed of audience creation

- Time to sync online and offline data

- Number of customer data points

- Number of customer experiences across channels

Sample marketing KPIs mapped to Real-Time CDP KPIs

- Engagement (clicks, downloads, opt-ins)

- Cost per engagement

- Cost per user acquisition

- Conversion rate

- Customer lifetime value

- Marketing ROI for paid media

4 Follow a phased Real-Time CDP implementation.

Our two-phase implementation plan delivers quick, strong results by prioritizing the most critical activities. It also avoids attempting to hit too many goals too quickly, which can delay time to value.

What is a phased implementation?

A phased implementation takes place in stages defined by milestones over time. Approaches may differ across business lines and audiences (B2B or B2C), but the implementation follows a clear sequence of events.

The initial implementation phase lays the groundwork, emphasizing planning for both technical and business workstreams, while establishing short-term and long-term use cases for Real-Time CDP. Project kickoffs give your team the flexibility to define program goals and KPIs to guide the implementation. This phase can be used as a discovery period, allowing the team to establish the required resources and steps necessary for the program's success.

The second phase involves two parallel workstreams that can be deployed simultaneously. The implementation workstream, centered on technology, focuses on mapping data, creating audiences, and testing performance. The readiness workstream, centered on the business, drives adoption and ensures long-term value.

Here's a closer look at how these phases build on each other.

Phase 1

Planning workstream

Goals

- Define program goals, KPIs, and scope of work.
- Determine priority use cases, data requirements to support segmentation, and activation channels aligned with business objectives.
- Create a project plan and timelines.

Example activities

1. Kickoff

- Conduct business and technical discovery.
- Provide early Sandbox access.
- Create a KPI-driven approach to tracking success.

2. Define objectives

- Share predefined use cases and define new use cases based on customer insights.
- Create a Business Requirements Document (BRD) integrated with industry best practices.
- Develop a Technical Solution Design (TSD) document for the implementation.
- Establish objectives for performance testing and define success criteria.

Milestones

- Finalize project plan.
- Create BRD and TSD.
- Identify top use cases.

Phase 2
(Workstreams take place simultaneously)

Implementation workstream	Readiness workstream

Goals

• Map data sources into Real-Time CDP. • Create audiences. • Conduct performance and user testing on data and profiles.	• Establish a center of excellence to manage Real-Time CDP and drive adoption across the organization. • Complete implementation and drive adoption.

Example activities

1. Design and implement • Identify and assess readiness of data sources and destination channels. • Have data modeling and data mapping conversations. • Provide overview of Data Usage and Labeling Enforcement (DULE) data governance framework. • Build audience segments in sandbox. • Set up integrations with destination platforms. • Activate segments and conduct quality assurance to ensure they appear in end destinations.	**2. Go live** • Validate connections to all data sources. • Conduct detailed reviews of customer profiles. • Validate audiences and conduct performance testing. • Continue enablement of building segments and destinations. • Provide technical training for end users. **3. Drive value** • Develop a long-term strategy and playbook to achieve measurable outcomes. • Build an audience activation analysis report. • Deliver coaching sessions for deployed use cases. • Perform a business outcomes review of value driven by implementation. • Deliver an activation summary of use cases, segments, and activations to marketers.

5 ## Establish a center of excellence.

A center of excellence (CoE) ensures that marketers have the people, processes, and organizational frameworks in place to support technological investments. While you may already have a CoE for data management technology, it needs to evolve alongside the implementation of Real-Time CDP to accommodate new data types, channels, and updated privacy commitments associated with this powerful technology.

What CoEs do

At the highest level, an Audience CoE for data management enables organizations to fully leverage their data platform investment. The Audience CoE governs platform usage, develops an organizational roadmap, tracks progress, measures results, and communicates effectively throughout the organization.

Sample CoE structure and responsibilities

	Core team	Stakeholder committee	Steering committee
Responsibilities	• Day-to-day platform management • Project plan and roadmap • Access control • Communication, including socialization of roadmap and coordination of use cases	• Participate in monthly readouts • Make cross-functional decisions • Define use cases	• Participate in monthly steering committee meetings • Sign off on cross-functional decisions • Break down roadblocks
Team members (examples)	• Product owner • Project manager • Marketing, analytics, advertising/agency SMEs • Privacy • CRM • IT and data engineering teams at time of implementation (data architect)	• Wider representation from media, CRM, analytics, IT, legal, and privacy	• Executive sponsors from marketing and IT

Shorten time to value with a successful Real-Time CDP implementation.

To get the most out of your Real-Time CDP implementation, remember these three takeaways:

1. **Prioritize use cases, capabilities, and architecture.** Segmenting your implementation into multiple phases helps you avoid unnecessary delays and makes it easier to identify which capabilities and technologies you'll need.

2. **Select, organize, and prepare the right data.** Real-Time CDP can ingest virtually any kind of data from any source. Rather than trying to connect all your customer data right away, focus on preparing data that's most relevant to your priority use cases.

3. **Assign resources for deployment.** Get the most out of your investment and reduce time to value by training your marketing and IT teams to run and support Real-Time CDP. This implementation guide can help you get started on the deployment process.

Contact Adobe Professional Services for more information on partnering for a smooth Real-Time CDP implementation.

Learn more about how Adobe Real-Time CDP can help you build, maintain, and activate real-time profiles for customers and accounts—all with privacy built in.

Adobe Real-Time Customer Data Platform

Adobe Real-Time CDP collects, normalizes, and unifies known and unknown individual and company data into robust customer and account profiles that automatically update in real time. Marketers use these profiles to deliver timely, relevant, and personalized experiences to any channel at scale. And with best-in-class usage governance, brands can use data more responsibly and transparently—so consumers have greater control over their information.