



GUIDE

The anatomy of a future-proof CDP.

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



Industrial manufacturing customers want simple experiences, even when products are complex.

Buying from an industrial manufacturer 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 a relationship that may involve installation, training and support, replacement parts, reorders of consumables, and more. These relationships can last years, involve many people, and be extremely complex.

However, all customers—even if their relationship with your firm is complex—want services that feel simple. Business buyers have become accustomed to the convenience of shopping online, and the expectation of personalized service has shaped their expectations at work. Now, they're demanding highly personalized experiences from their manufacturing partners—whether they're interacting with a customer portal or talking to a service rep.

But the only way to deliver the personalized experiences that buyers want is by fully harnessing your customer data so that you have a unified view of every customer, in real time. This is where a customer data platform (CDP) comes in.

Whether you have a CDP that's not living up to your expectations and 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—one that will support your data strategy and allow you to create differentiated, real-time customer experiences now and in the future.

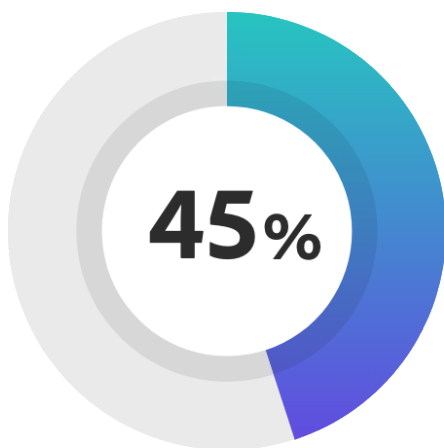
CDPs: bridging the customer data gap.

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. On top of that, many manufacturers struggle to unify data and transform it into insights. In a survey of 400 US and UK manufacturing executives, fewer than half (44%) of respondents said digital transformation was providing them with additional actionable data—and 19% were not harnessing any data insights at all.

Because manufacturers typically prioritize innovations to streamline supply chains and improve efficiency on the factory floor, marketing and customer experience (CX) technology is often left behind. If you're like most industrial manufacturers, your customer data is fragmented in different data systems and platforms, so getting a complete view of the customer is difficult to do.

Even if you stitch together the data from these systems with spreadsheets, it's time-consuming. There will also be a significant lag from insights to action. And this will probably not be enough to demonstrably improve customer satisfaction—which 45% of manufacturing leaders surveyed by Fictiv identified as a top business priority.

What's more, the lack of complete customer profiles isn't a problem for just marketing and sales—it's also a problem for product R&D. 56% of manufacturing executives say that customers want new products faster. And to do this, you need to know exactly what they want. That's why feedback from customers at every stage of their journey—from purchase to installation to maintenance—is essential to product innovation.



45% of manufacturing leaders identified improving customer satisfaction as a top business priority.

Source: 2022 State of Manufacturing Report, Fictiv, 2022.





Top 10 CDP use cases:

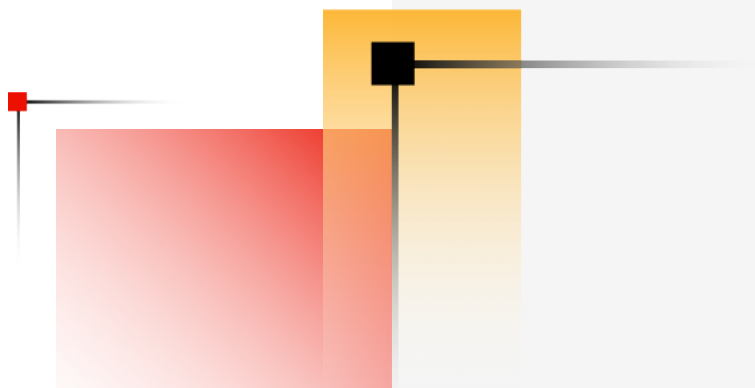
A customer data profile that gives you the context to meet your customers' expectations at every interaction—and the insights to predict their future needs—requires unified data across systems, channels, and teams. This is a CDP's main job.

CDPs connect customer data streams, whether that data is behavioral, transactional, financial, and operational—or from a CRM or ERP system. 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 quickly in and out of marketing automation platforms, business intelligence and data visualization solutions, email service providers (ESPs), customer relationship management (CRM solutions), and other CX-oriented systems.

The right CDP not only makes delivering real-time personalization substantially easier, but it also sets you up to discover data-driven opportunities. And because CDPs connects data systems across your company—from marketing and customer service to call centers and payment systems—they can also support non-marketing for teams in sales, service operations, and R&D. For example, combining service data with web browsing behavior can identify hidden customer needs, making CDPs an equally important part of your martech stack, 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.

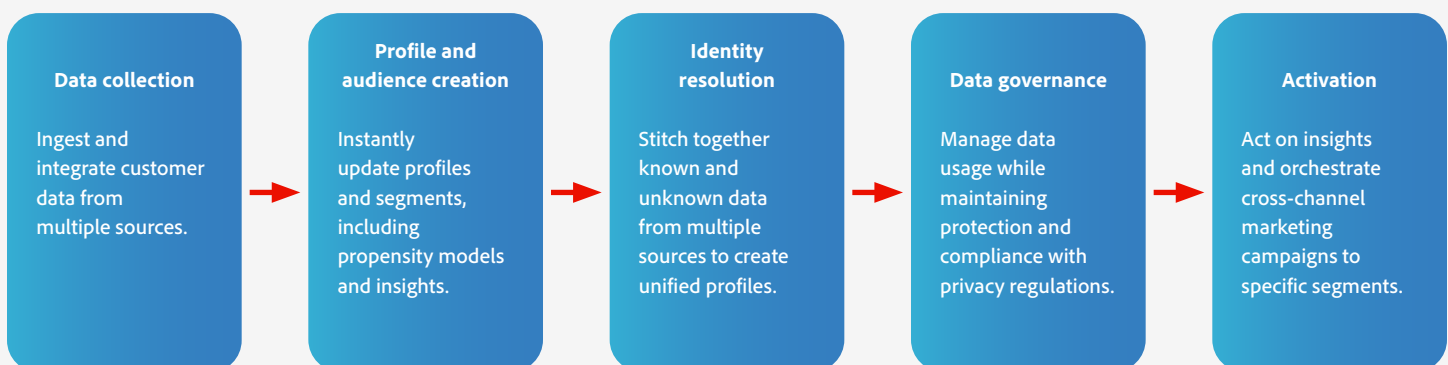
To deliver great customer experiences, your customers must be confident that your company understands their challenges and needs. But where do you start? You need to show customers that you know the industry they're in, the size of their business, their existing infrastructure, where they are in the sales funnel, and the specific challenges they are facing based on their demographics and behaviors. And 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 their business. Building this type of experience means customizing offers and building packages according to customer needs, so the experience isn't just personalized, but provides real value. Here again, the CDP enables you to deliver customized content and offerings based on your customer's unique profile.

Finally, you want to offer customers something relevant and personalized to their needs. Think about a construction equipment manufacturer. Using CDP data, this company can identify people from its target accounts when they visit the company website and recommend content focused on appropriate products and services. Likewise, the CDP can arm sales reps with information on each customer's latest service interactions so they can recommend the right equipment upgrades and service contracts.

A CDP helps you build great experiences by making it easy to identify what customers need at specific moments in the customer journey. Because manufacturing sales cycles are often long and complex, connecting customer information can help every part of your organization simplify the customer experience. No matter how or where they interact with your company, customers will no longer have to repeat themselves or bring your people up to speed. This will make business faster—and customers happier.

Create connected customer experiences in 5 steps.



For more details on the attributes of a CDP, see the appendix.

Key capabilities of a future-proof CDP.

Almost every CDP can collect data, create profiles and audiences, resolve identities, govern data, and act on insights. But that doesn't mean all CDPs are created equal. Some focus more heavily on identify management, analytics, and data orchestration. Others are more finely tuned for a specific industry, like manufacturing.

As an industrial manufacturer, your needs are often unique. You typically sell to medium and large-sized businesses and rely on direct sales and service teams to manage long-standing relationships. You may need to use a CDP to identify buyers within a large account and deliver targeted content just for them. You may also want to identify how your customers are using your products, the operational issues they face, and how much service and support they need. These insights can help you uncover opportunities to improve your product and refine your service agreements.

You also want to be mindful of "point CDPs," which are solutions designed to serve just one primary purpose, such as the storage of known or 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 may also lack B2B capabilities and can require extensive customization, potentially adding cost and complexity to your IT environment.

In your search, look for a CDP that can deliver a fully connected customer experience with real-time personalization across the entire customer journey.

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 immediately. 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 that's 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 the known (personal identifying information, or PII) and unknown (pseudonymous, or person-level) data together with B2B account data in one 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—and real-time data activation ensures your ability to deliver experiences based on incoming changes to those profiles.
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 and scale of your business, 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—without putting an additional burden on IT. It should also be built from the ground up to ensure scalability, offer prebuilt integrations with sources and destinations, and 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 needs and offer recommendations.

But this maturity and growth is only possible when you ensure that the CDP you choose has the capabilities to grow with you. That's why it's important to find a CDP with everything you need to deliver exceptional experiences across the customer journey—all while being scalable, flexible, and extensible for future 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 customers and prospects with simplified and centralized management of complete marketing profiles. Purpose-built for teams in marketing, sales, and services, it offers the full set of capabilities needed to deliver one-to-one experiences that make each interaction relevant. You'll have the power to stream data collection from all your systems, implement AI or ML, use a patented data governance framework, and activate content in real-time across channels.

Discover how to use Adobe Real-Time CDP to create and deliver uniquely personal experiences across your entire customer base—in the moment it matters.

[Learn more](#)



A guide to building a robust CDP request for proposal.

The defining features of a CDP include its ability to pull data from multiple sources, aggregate it into a single profile, and segment and orchestrate activation across multiple customer touchpoints. Historically, CDPs have been focused on one of three areas: data storage, data handling and management, or data analytics, visualization, and activation.

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

CDP characteristics and capabilities

Category	Characteristics	Capabilities
Data collection	<p>Data management system: Includes a unified and persistent database that can be accessed by other marketing technology, and 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"> • 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. • Ability to integrate with mobile apps and websites to gather and analyze information about customers and ingest into the platform. • 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. • 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.
	<p>Native integrations: Has the ability to set up new data integrations without SDKs or additional tracking codes.</p>	<ul style="list-style-type: none"> • Must have prebuilt source connectors. • Must have prebuilt destination connections. • Ability to build custom connections with internal or partner systems. • 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.
	<p>Ingestion: Loads data from multiple customer touchpoints in real time.</p>	<ul style="list-style-type: none"> • Ability to collect and process real-time data—tens of millions of events per second—from multiple sources and then organize the data. • Ability to ingest known and anonymous data from multiple enterprise sources. • Ability to automate ingestion from enterprise data warehouses, data lakes, and other big data systems. • Ability to ingest data via batch ingestion at any frequency and streaming ingestion on a real-time basis. • Ability to ingest data from third-party sources. • Flexibility to import existing or predefined audience lists into the platform for further segmentation and reporting analysis. • No hard limitations on the number of attributes, customer records, segments, or data volumes that can be ingested into the platform. • Support structured and unstructured data. • Ability to standardize data coming in from multiple sources or systems (e.g., standardize different date formats).

Category	Characteristics	Capabilities
Profile and audience creation	<p>Segment management: 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"> • 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). • Ability to create segments based on any profile and event data available. • Utilize dynamic segmentation instead of static segmentation to solve the scalability problems marketers traditionally face when building segments for marketing campaigns. • 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." • Flexibility to use rules to nest audience segments (e.g., segments within segments). • 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. • Ability to determine segment membership in batch or streaming modes, or on the edge to enable same page or next page personalization use cases. • Ability for marketers to identify and size a customer segment or audience.
Identity resolution	<p>Stitching: 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"> • 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. • 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. • 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. • Ability to unify customer records and data using deterministic matching. • Provide a way to standardize various datasets into one unified profile of customers using custom mappings from existing data. • Utilize an identity graph to map different identity namespaces, providing a visual representation of how your customers interact with your brand across different channels. • 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."
	<p>Profile generation: Ability to define profile merge policies to make sure preferred profile data is used.</p>	<ul style="list-style-type: none"> • Ability for profile merge policies to run in real time. • Ability to set up merge profile policies based on organization-defined needs. • Ability to support multiple merge policies to create multiple views or customers for different uses. • 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).
Data governance	<p>Privacy regulations compliance</p>	<ul style="list-style-type: none"> • Ability to automate compliance with data privacy regulations, including CCPA (California), GDPR (European Union), LGPD (Brazil), the New Zealand Privacy Act, and PDPA (Thailand). • 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. • Ability to update or correct data when requested by a data subject (Right to Rectification). • 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.

Category	Characteristics	Capabilities
Data governance	Built-in data protection	<ul style="list-style-type: none"> • APIs must be authenticated and authorized using standards such as OAuth and JSON web tokens (JWT) to maintain the security of applications and users. • 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. • Provide configurable data security and encryption in transit or at rest. • Be governed by a comprehensive set of documented security processes and be subject to numerous security audits to maintain and improve quality. • Ability to update records, delete records, and create “time to leave” parameters based on dates. • Ability to define how long to store historical transactions and to store raw data indefinitely.
	Built-in compliance features	<ul style="list-style-type: none"> • Include features that provide guardrails on what data can be used for activation purposes across different customer engagement touchpoints. • 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. • Has prebuilt integrations with consent management solutions like Evidon, OneTrust, and TrustArc, and the ability to integrate other solutions through an extension.
	SSO (single sign-on)	<ul style="list-style-type: none"> • 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.
	Role-based permissions	<ul style="list-style-type: none"> • Admins are able to control how different roles interact with customer data. • Admins are able to manage and restrict usage.
Activation	Orchestration: 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"> • Allow real-time profile orchestration for cross-channel marketing campaigns powered by data from the CDP. • 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. • Ability to orchestrate omnichannel campaigns in real time for channels such as mobile, SMS, transactional and promotional email, digital, and social media. • Ability to create and manage customer journeys within the platform. • Ability to set up real-time triggers based on customer behavior.
Other		<ul style="list-style-type: none"> • 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. • 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. • 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. • 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. • Provide multiple support models depending upon requirements. Provide 24x7x365 unlimited access to technical support regardless of customer location or region.

Sources

[2022 State of Manufacturing Report](#), Fictiv, 2022.

[Survey: Digital Transformation Efforts Lag, Despite Surge of Pandemic-Driven Investments](#), Automation.com blog, May 16 2022.



Adobe, the Adobe logo, Experience Platform, and Real-Time Customer Data Platform are either registered trademarks or trademarks of Adobe in the United States and/or other countries.

© 2022 Adobe. All rights reserved.