



BlueVenn SUMMIT 2020

Raleigh, NC | January 27 - 28

Evolution of the CDP landscape

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What's a CDP?



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Packaged software

Persistent, unified
customer database

Accessible to other systems.

SOURCES

CDP

DELIVERY

- CRM
- WEB
- MOBILE
- EXTERNAL



- CRM
- WEB
- MOBILE
- DMP

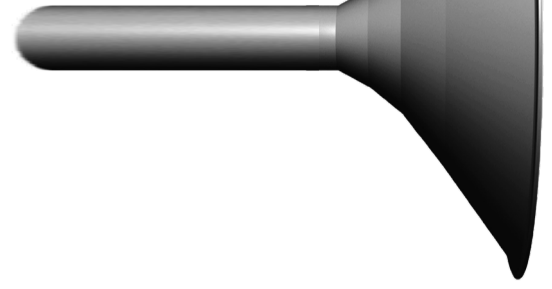
SOURCES

- CRM
- WEB
- MOBILE
- EXTERNAL



CDP

Load, Clean
Transform
Link Data
Aggregate
Expose
Segment



DELIVERY

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SOURCES

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DATA

- Load, Clean
- Transform
- Link Data
- Aggregate
- Expose
- Segment



DECISIONS

- Predict
- Measure
- Personalize
- Orchestrate
- Budget
- Content



DELIVERY

- CRM
- WEB
- MOBILE
- DMP

Do can I do
with a CDP?



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Customer Data Maturity Stages

Unify Data

Analyze

Predict

Outbound Campaigns

Real Time Interactions

Orchestrate Across Channels

✓	✓	✓	✓	✓	✓
	✓	✓	✓	✓	✓
		✓	✓	✓	✓
			✓	✓	✓
				✓	✓
					✓

What's a CDP Use Case?

= Use case made possible by CDP

CDP Use Case: Unify Data

Problem	Online game logs are not accessible to analysts
Solution	Load logs into CDP and apply analysis tool
Benefits	Improved game play based on insights from analysis
Inputs	Session logs from game, user profiles from registrations
Processes	Load logs and profiles into CDP; place in accessible format; apply analysis tool; report on results
Outputs	Analysis-ready files; analysis results
Skills	Log access, log analysis
Measures	Game sessions analyzed/hour, revenue impact of recommendations

CDP Use Case: Analyze

Problem	Specialty sports brand wants to grow email list
Solution	Identify high value personas and target via paid social ads
Benefits	Focus acquisition spend on high value names
Inputs	Existing customer attributes and transaction history
Processes	Identify high-value customers; send to social media for look-alike targeting; run campaign to capture emails
Outputs	List of current high-value customers
Skills	Data assembly, customer value analysis, audience creation
Measures	Number of new email names, lifetime value of acquired customers

CDP Use Case: Predict

Problem	Online bookseller wants special campaign to target likely second-purchase buyers
Solution	Build predictive model to identify likely second-purchase buyers
Benefits	Higher second-purchase and future revenue with limited cost
Inputs	Customer transactions, behaviors, and engagement data
Processes	Create unified profiles, build predictive model to identify likely second-purchase buyers; execute targeted campaign
Outputs	List of buyers ranked by second purchase likelihood
Skills	Unify customer data, build predictive models, create campaigns, read campaign results
Measures	Second-purchase rate (test vs control), cost/second purchase, lifetime value



CDP Use Case: Outbound Campaigns

Problem	Retailer company wants to stop retargeting emails after customer makes in-store purchase
Solution	Link in-store purchases to online customer profile and remove buyers from retargeting audiences
Benefits	Fewer annoyed customers, substitute more effective emails
Inputs	Online products considered, online and in-store purchases
Processes	Identify products considered but not purchased; create retargeting email audience; link subsequent online and retail purchases to customers; remove buyers from retargeting
Outputs	Updated lists for retargeting email
Skills	Unify online and retail customer ID; manage email system
Measures	Time between purchase and removing buyer from retargeting list; change in email metrics (open, unsubscribe, purchase)

CDP Use Case: Real Time Interactions

Problem	Insurance company wants higher Web site conversion
Solution	Show visitors intent-based messages on Web site
Benefits	Higher conversion leads to higher sales
Inputs	Web content consumption by visitor, intent related to content
Processes	Identify visitors over time, track content consumption, infer intent topics, offer related content during future site visits
Outputs	Recommended topics for each visitor, content delivered by Web system
Skills	Data loading, content analysis, Web site personalization
Measures	Repeat visitor conversion rate

CDP Use Case: Orchestrate Across Channels

Problem	Global banks wants to deliver next best action in all channels
Solution	Central orchestration engine instructs channels in real time
Benefits	Better experience for customers, more revenue / action
Inputs	Life event signals, account details, current context
Processes	Identify customer during interaction, use predictive models to identify best action, send to channel for execution
Outputs	Recommended action
Skills	Data assembly, predictive modeling, campaign design, delivery system operations
Measures	Change in lifetime value, revenue per interaction

What's a CDP Use Case?

= Use case made possible by CDP

= Use case requiring unified,
persistent, shared customer data



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How Can I Use It Well?

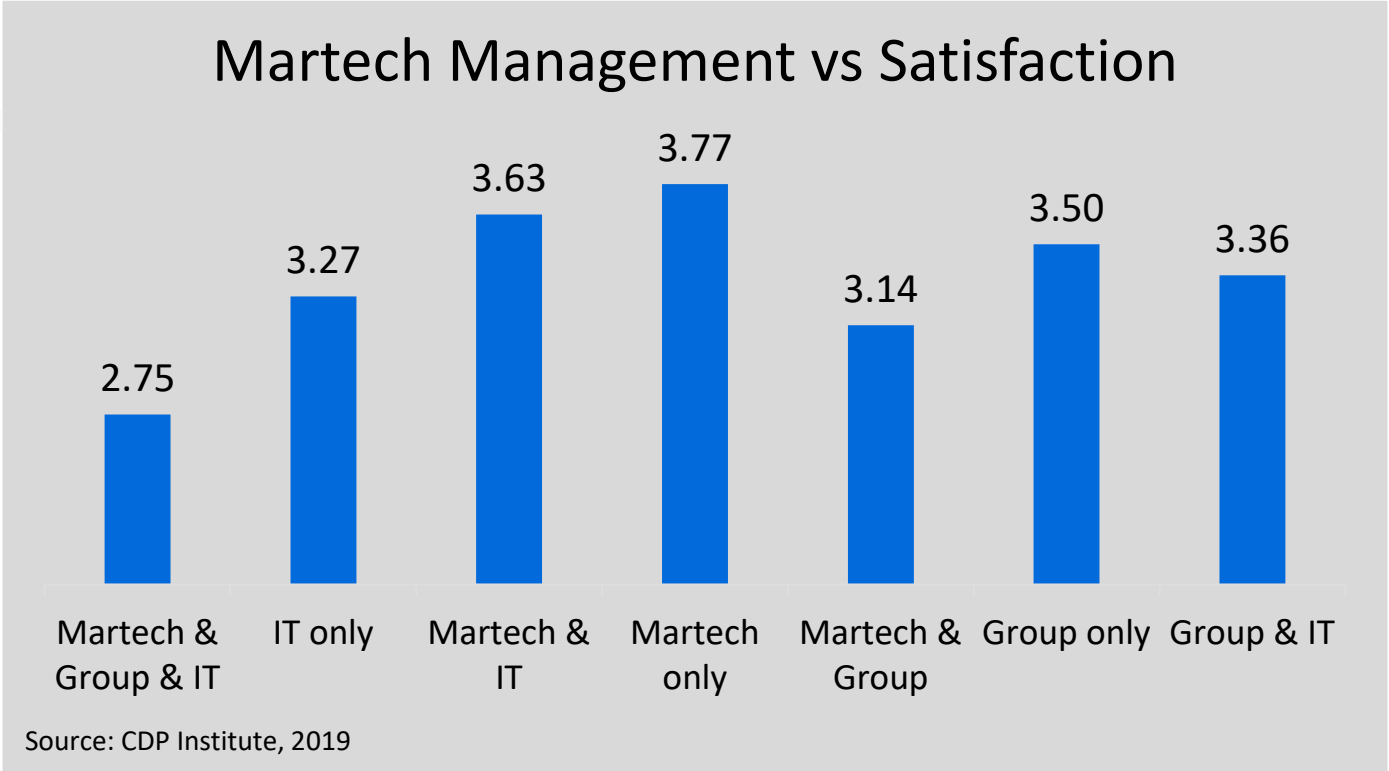


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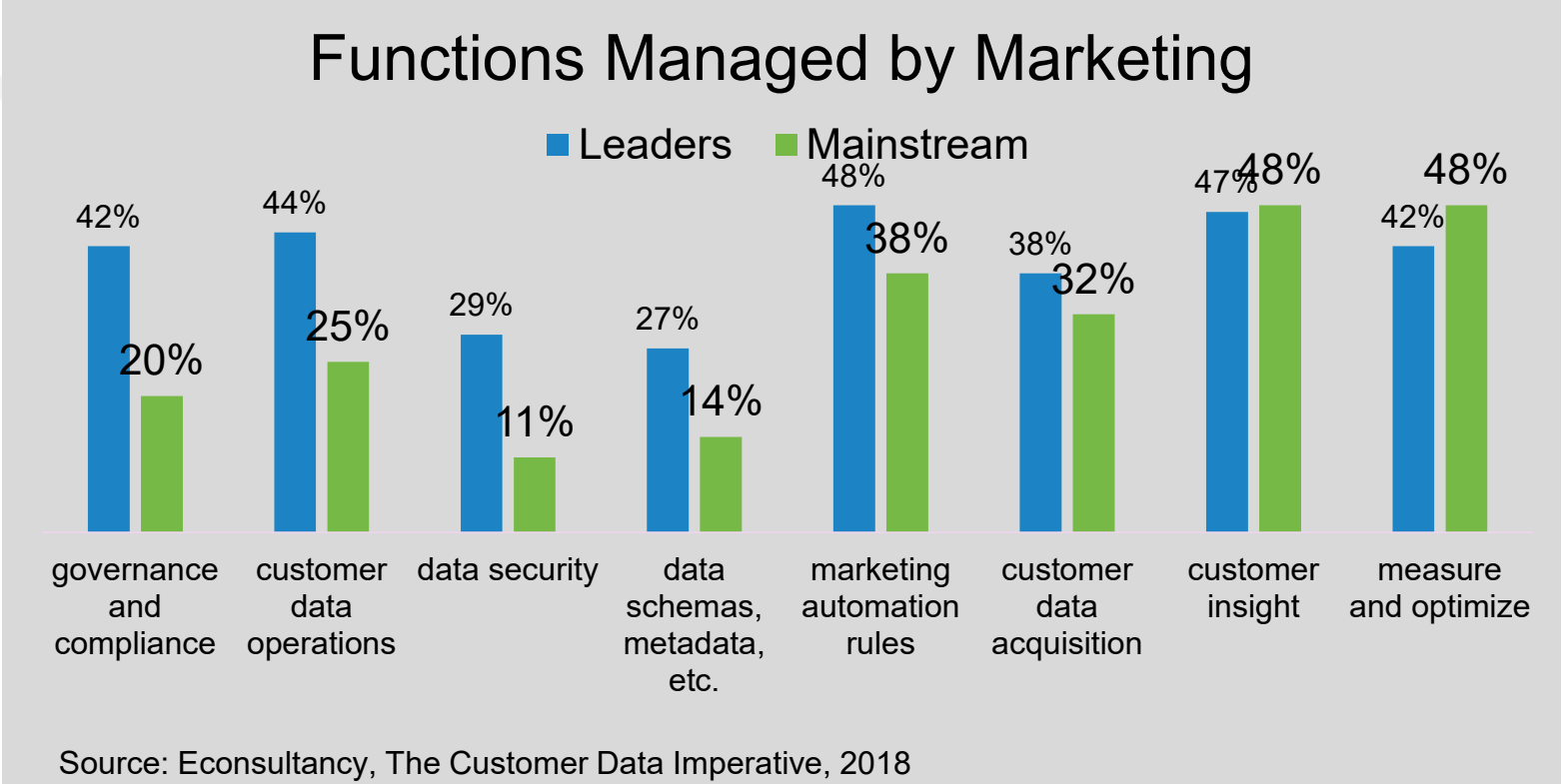


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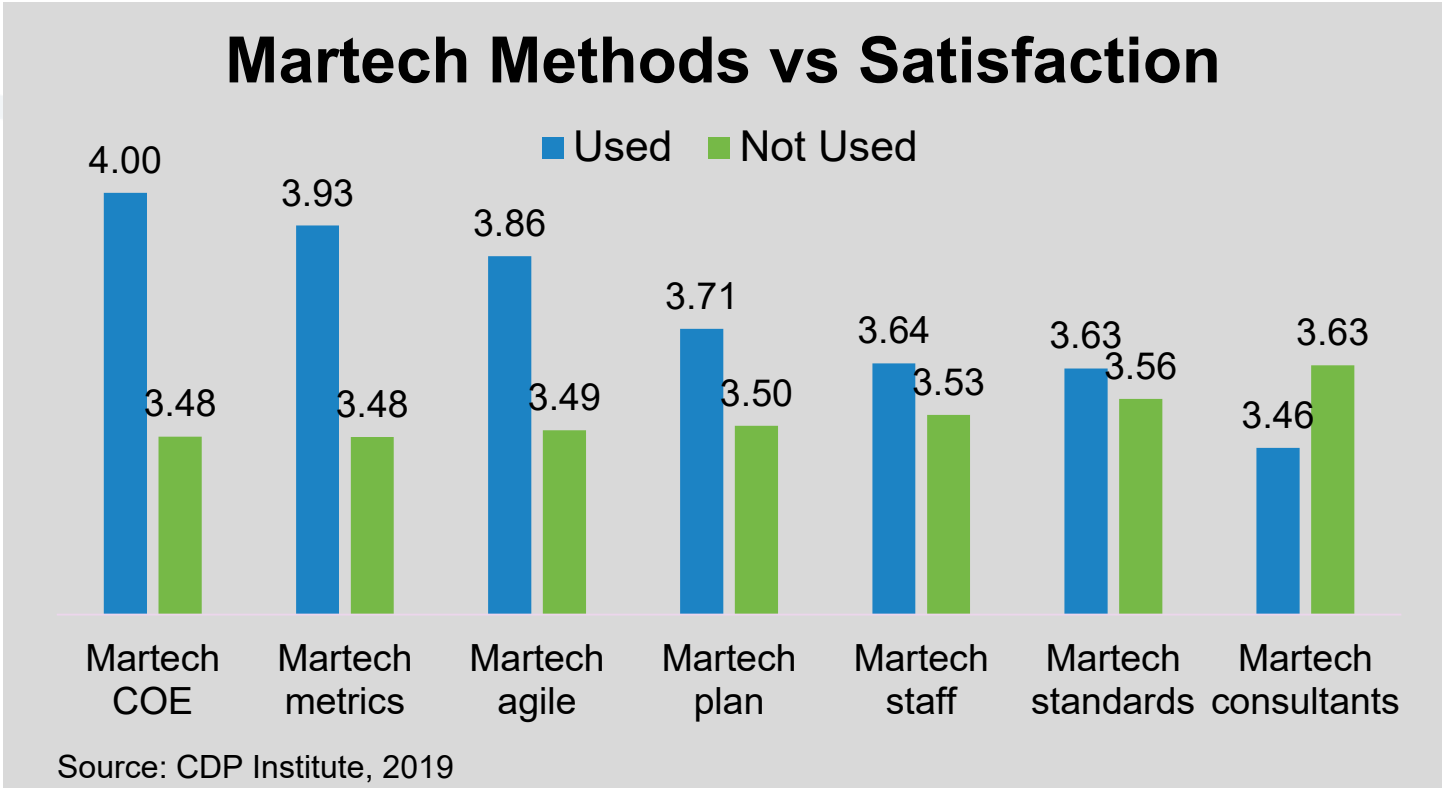
Work with experts



Give control to users

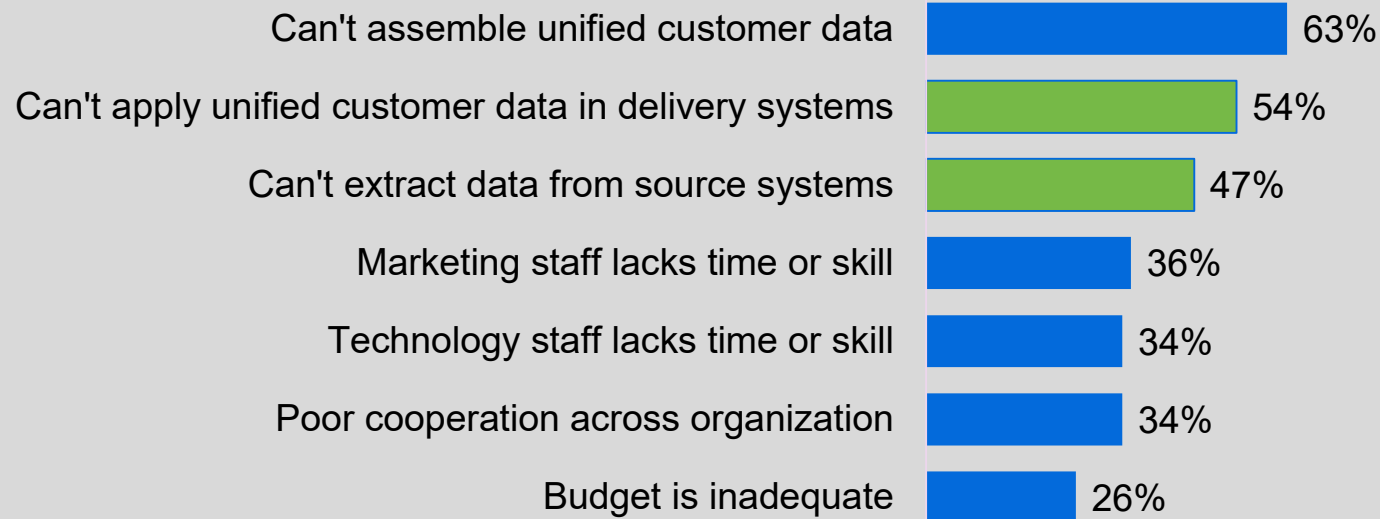


Apply formal management



Check source and delivery systems

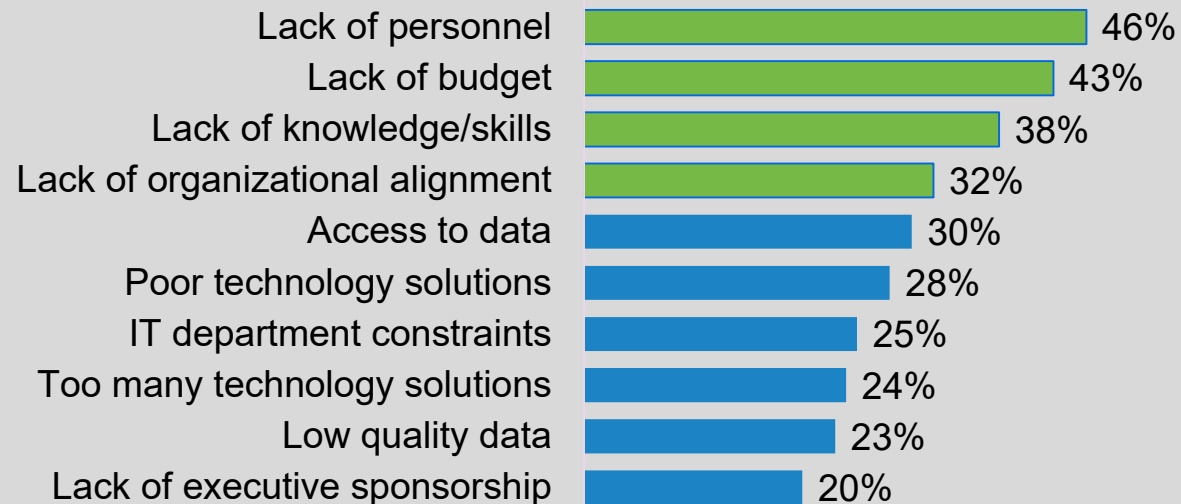
Biggest Obstacles to Better Customer Data Utilization



Source: CDP Institute, 2019

Address organizational issues

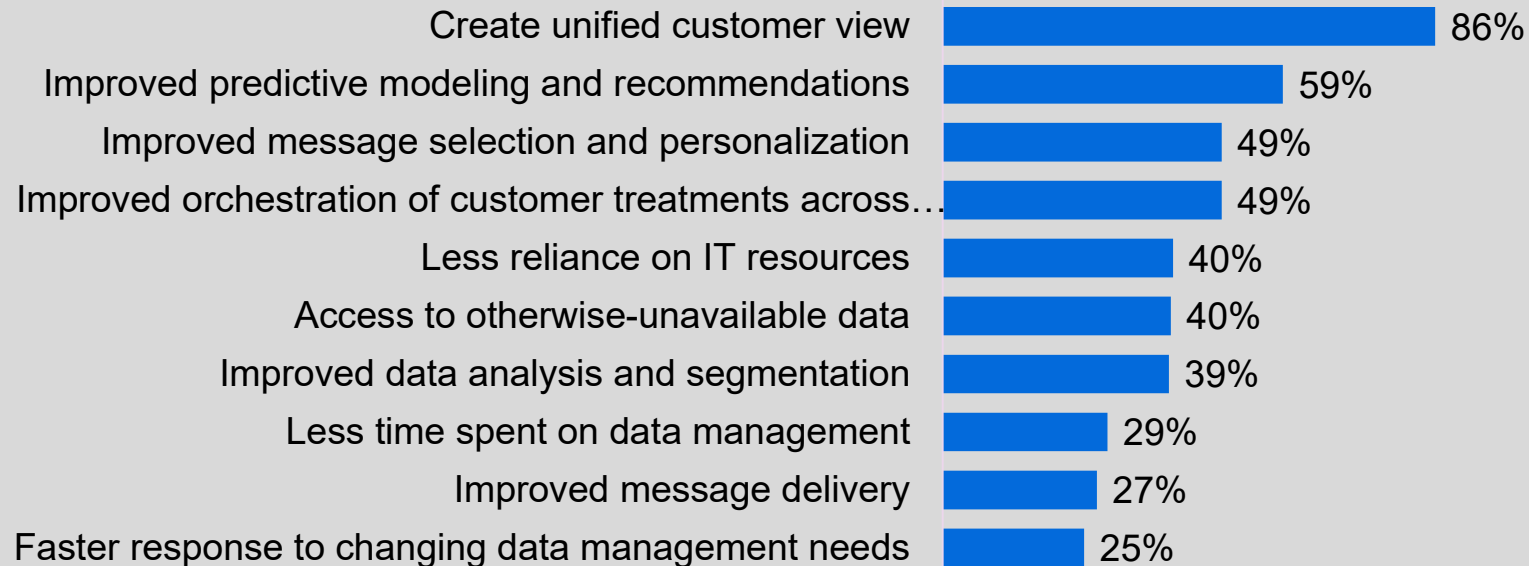
Greatest Obstacles to Making Personalization a Bigger Priority



Source: Researchscape International/Evergage, 2019 Trends in Personalization

Deploy incrementally

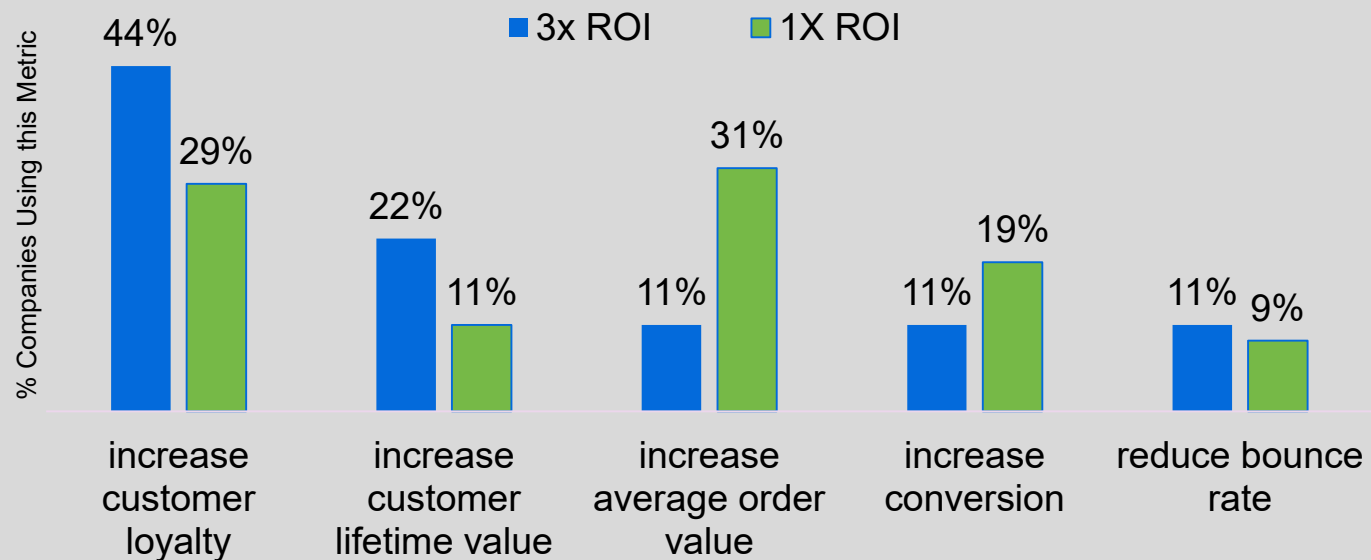
Benefits Expected From a CDP



Source: CDP Institute, 2019

Measure long-term results

Primary Personalization Metric vs ROI



Source: Monetate, 2019 [Personalization Development Study](#)

Remember
This...



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CDP is a Tool

- Learn what it can do
- Pick the right one
- Use it properly





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Questions?

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