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The Right Way to Select CDP Technology

August 18, 2021

Real Story GROUP
MAKE BETTER TECHNOLOGY DECISIONS

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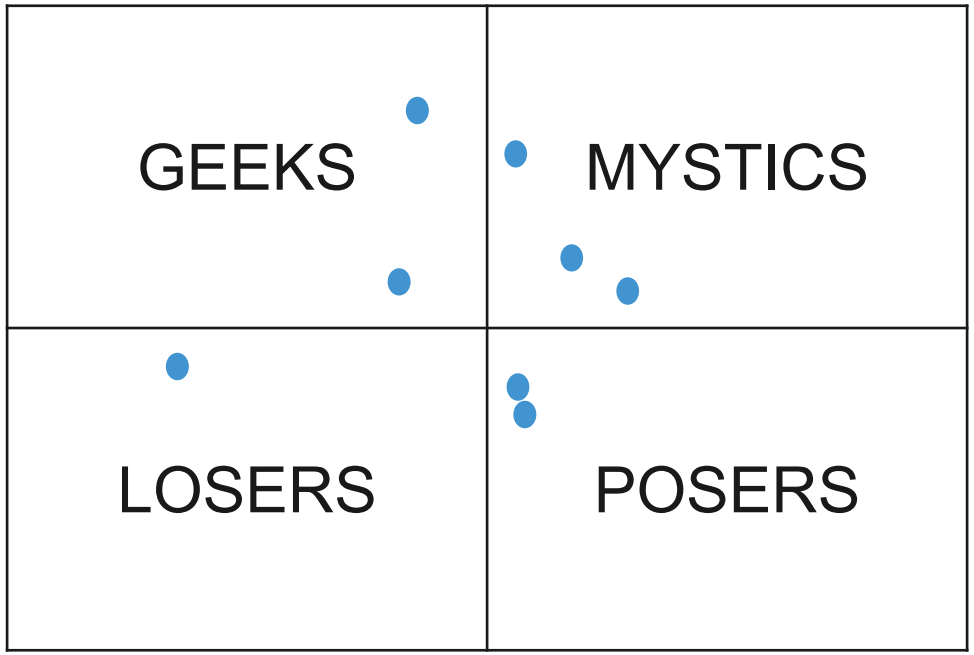
A Different Kind of Analyst Firm…



"the mystical quadrant"

INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

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MARTECH STACK VENDOR MAP

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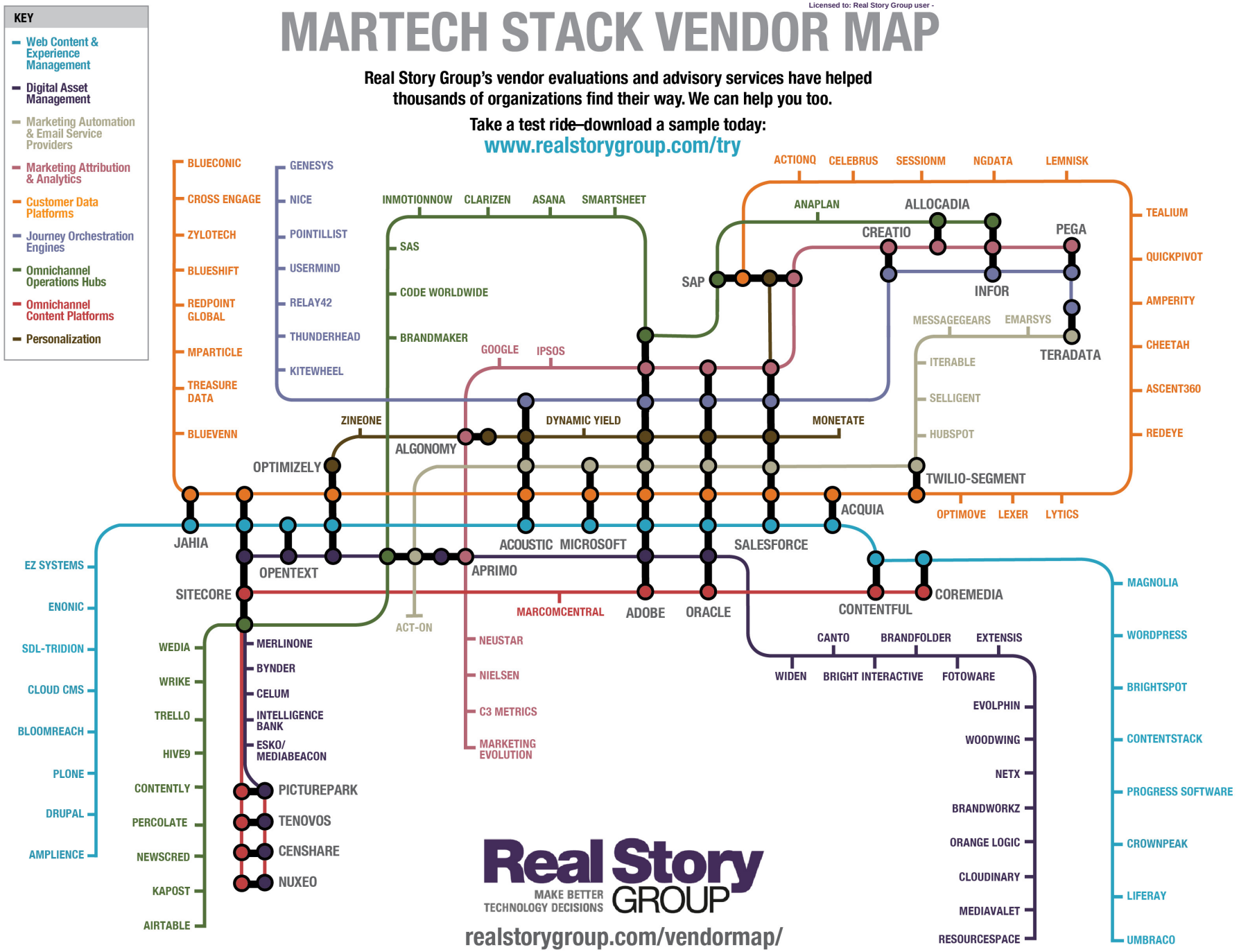

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Agenda

Key Architectural Decisions

CDP Marketplace

The Right Way to Select a CDP

Key Take-Aways

RSG MarTech Services Reference Model

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ENGAGEMENT CHANNELS

- Ads
- Web
- Email
- Mobile
- Social
- Print
- Alexa
- Chat
- Call
- PoS/ F2F
- IoT/ Product

INTERACTION & DELIVERY ENVIRONMENTS

Advertising	Sites	Applications	Distribution	Storefront	Contact Center
Generate demand	Deliver information	Deliver services	Deliver via channel	Sell things	Answer questions

CONTENT & ENGAGEMENT SERVICES

Product Information Management	CRM & SFA	Social Media Management	Outbound Marketing	WCM	Ecommerce
Manage and syndicate product info	Automate sales & manage relationships	Engage in social media & communities	Manage campaigns Deliver messages	Manage web content & inbound experiences	Manage commercial activity

ENTERPRISE FOUNDATION SERVICES

CONTENT

- **Omnichannel Content Services** — Manage components fueled with data
- **Digital Asset Management** — Manage rich media & brand assets

DATA

- **Customer Data Activation** — Manage actionable data & segments
- **Customer Data Management** — Ingest, process, and unify customer data

DECISIONING

- **Omnichannel Personalization** — Customize individual experiences
- **Journey Orchestration** — Set decisions for omnichannel engagement

Data Intelligence: Analytics, Reporting & Visualization, Predictive Modeling, Dashboards

Creative & Marketing Ops: Creative & Content Ops, Scheduling, Project & Resource Mgmt

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Emerging Model

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FIRST / ZERO PARTY CUSTOMER DATA

- Profile
- Social Activity
- Mobile Activity
- Web Activity
- Customer
- Event Data
- Product Interaction
- E-Commerce
- CRM Records
- Email Activity

SECOND & THIRD PARTY DATA

- Statistics
- Demographics
- Income
- Data Exchange
- Occupation
- Weather
- Ad Data
- Interest / Intent
- Firmographics
- Location

CUSTOMER DATA MANAGEMENT

Ingest

Transform

Clean

Process

Unify

Enrich

Comply

Graph

Rules

Other…

Data Fabric

CUSTOMER DATA ACTIVATION

Customer API

Segment

Event Handling

Activate

(Calculate)

(Personalize)

(Orchestrate)

(Test)

Other…

CDP

OMNICHANNEL ENGAGEMENT

- Social
- Site Personalizat'n
- Messaging
- Customized Emails
- Voice
- Ecommerce
- CRM
- Call Center

TARGETED ADVERTISING

ENTERPRISE ANALYTICS

- Predictive Modeling
- Statistics
- Dashboard & Visualizations

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Key Options for Vertical and Horizontal Scope

ENGAGEMENT CHANNELS

Ads | Web | Email | Mobile | Social | Print | Alexa | Chat | Call | PoS/ F2F | IoT/ Product

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CDP?

ENTERPRISE FOUNDATION SERVICES

CONTENT

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Manage components fueled with data

Digital Asset Management
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DATA

Customer Data Activation
Manage act… & segments

CDP Core

Customer Data Management
Ingest, proce… ify customer data

CDP?

DECISIONING

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Customize… al experiences

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Agenda

Key Architectural Decisions

CDP Marketplace

The Right Way to Select a CDP

Key Take-Aways

CDP Market: Fragmentation Persists

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Suite Vendors

Microsoft
SAP
Adobe
salesforce
acoustic
Acquia
ORACLE

Pure-Play Platforms

arm TREASURE DATA
blueconic
sessionm
lemnisk™
BlueVenn
blueshift
mparticle
Lytics
RedEye
NG DATA
dun & bradstreet
ACTIONIQ
REDPOINT GLOBAL
optimove
QuickPivot™
Amperity
CrossEngage
Segment
lexer
TEALIUM
Ascent360
celebrus
ALGONOMY

Analysis of Suite Vendors

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Suite Vendors

Microsoft

SAP

Adobe

salesforce

acoustic

Acquia

ORACLE

General Observations About These Vendors:

- Brands are well-known but…
- Their solutions are newer and generally thinner
- Tend to be very parochial: focus on aligning data in their own stacks rather than independent layer
- Tend to rely on / bind you to other solutions in their suites
- Tend to be comparatively much pricier

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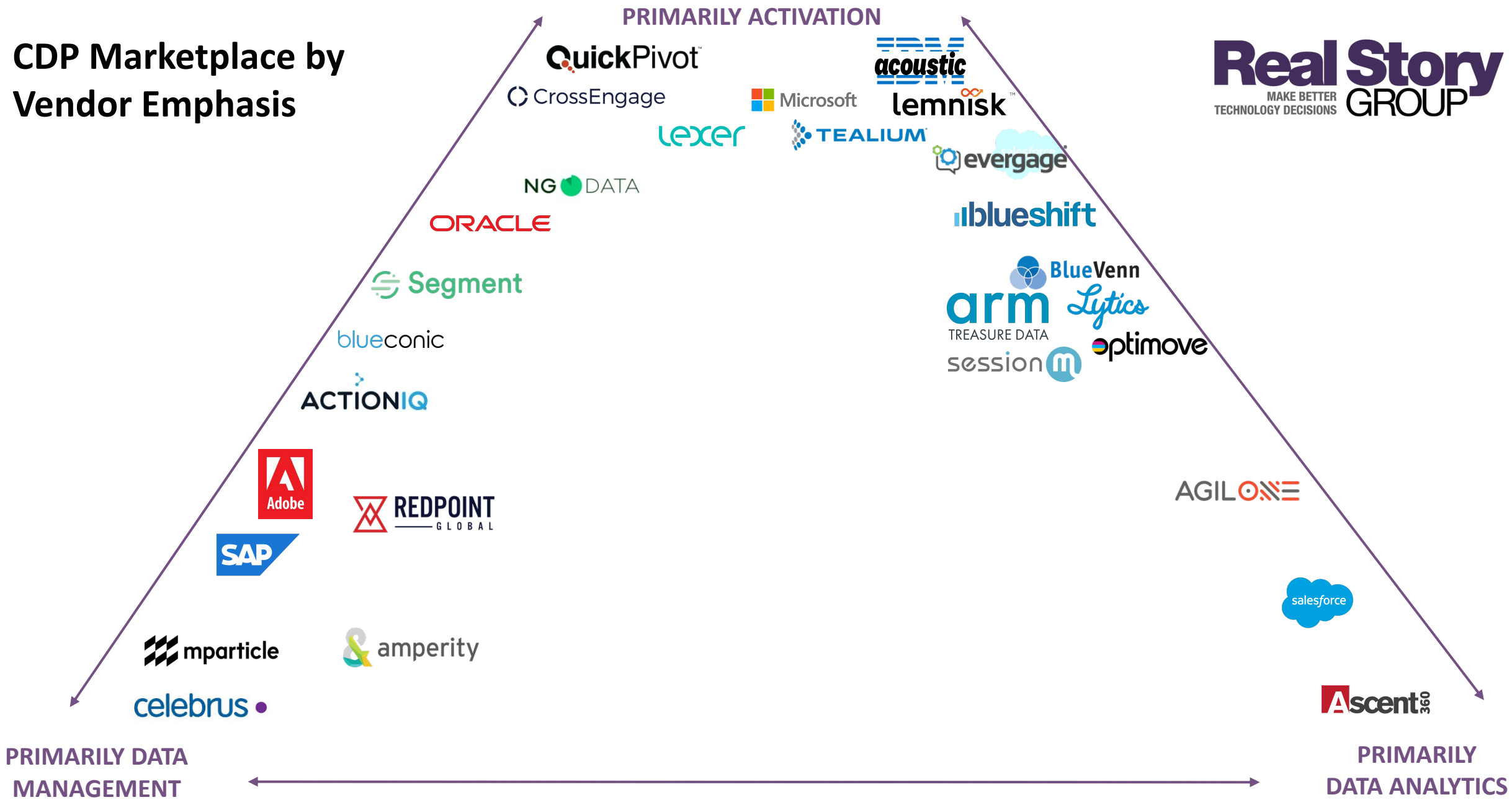
CDP Marketplace by Vendor Emphasis



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Key Architectural Decisions

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Key Take-Aways

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Four Traditional Approaches to Evaluation…and a Bonus

Caveat: What Other Vendors May Try to Sell….

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INTERACTION & DELIVERY ENVIRONMENTS

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"We're a CDP!"	Deliver information	Deliver services	Deliver via channel	Sell things	Answer questions

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Product Information Management	CRM & SFA	Social Media Management	Outbound Marketing	WCM	Ecommerce
Manage and syndicate product info	Automate sales & "We're a CDP!"	Engage in social media & communities	Manage campaigns "We're a CDP!"	Manage web content "We're a CDP!"	Manage commercial "We're a CDP!"

ENTERPRISE FOUNDATION SERVICES

CONTENT

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Manage components fueled with data

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Creative & Marketing Ops: Creative & Content Ops, Scheduling, Project & Resource Mgmt

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Term of the Day….

“Design-Thinking”

Business-focused
Team-based
Empirical
Iterative
Adaptive

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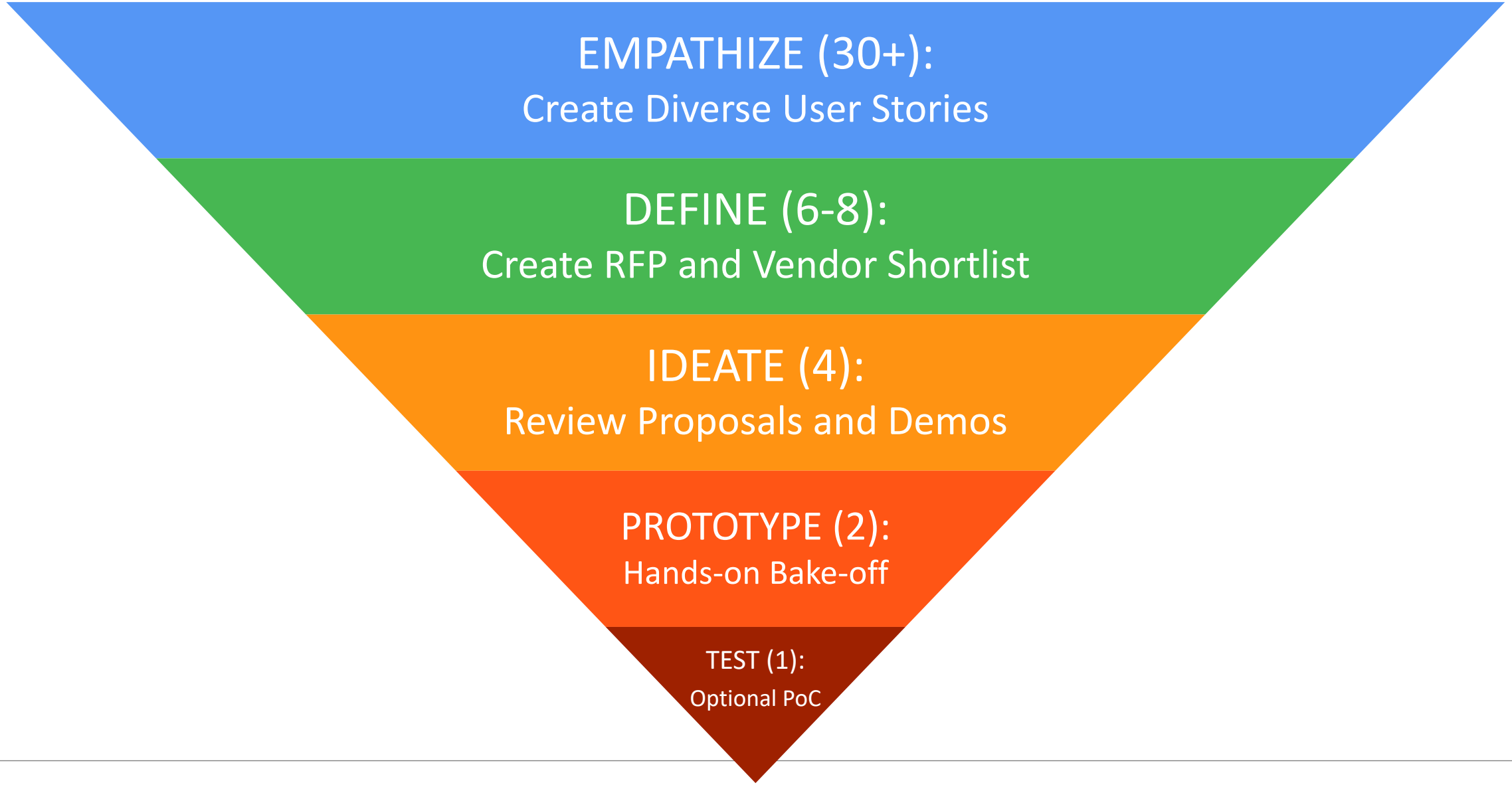
How to Filter…



Ten Potential CDP Business Use Case Categories

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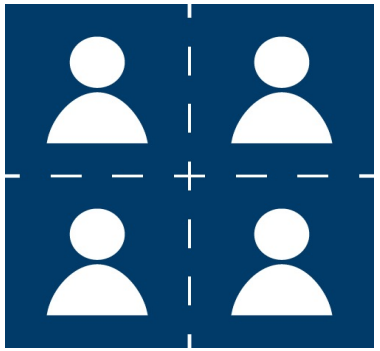
Advanced Customer Data Management

Predictive Analytics



Outbound Marketing Campaign Support

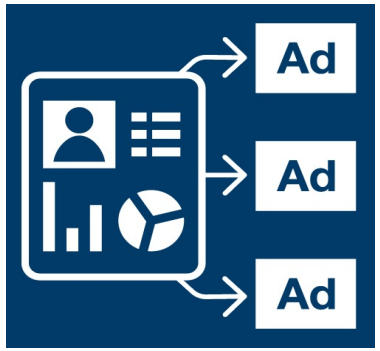
Online Personalization & Experience Optimization

Ecommerce Recommendations & Optimization

Omnichannel & Offline Aggregation

Realtime Behavioral Analysis

Household / Channel Support



Digital Advertising Support

Loyalty & Rewards Management

Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Do you want the CDP platform to **support** or **execute**?

Generate a “Real” Quadrant

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Real Story GROUP 20 Years

LOGOFF

CDP use cases

RealQuadrant™ SHORTLIST GENERATOR

Get the right vendor shortlist based
Customer Data Platforms

STEP 1: Technology Marketplace

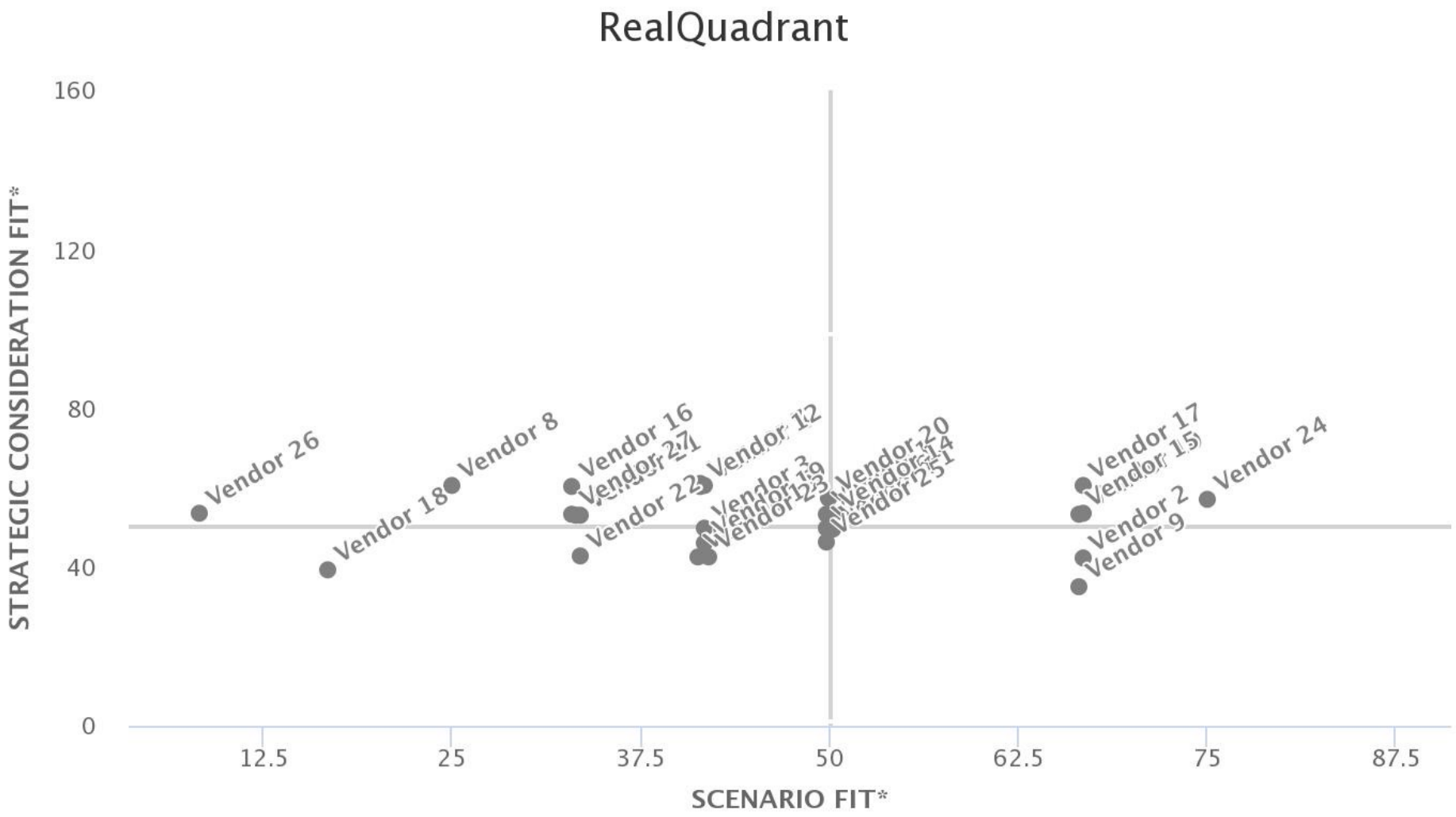
STEP 2: Criteria

STEP 3: Use Scenar

Weigh the importance of each Scenario (optional)

Scenario	Weight
Outbound Marketing Campaign Support	34%
Omnichannel & Offline Aggregation	33%
Digital Advertising Support	33%
Total Weighting Must equal 100%	100%

Must equal 100%



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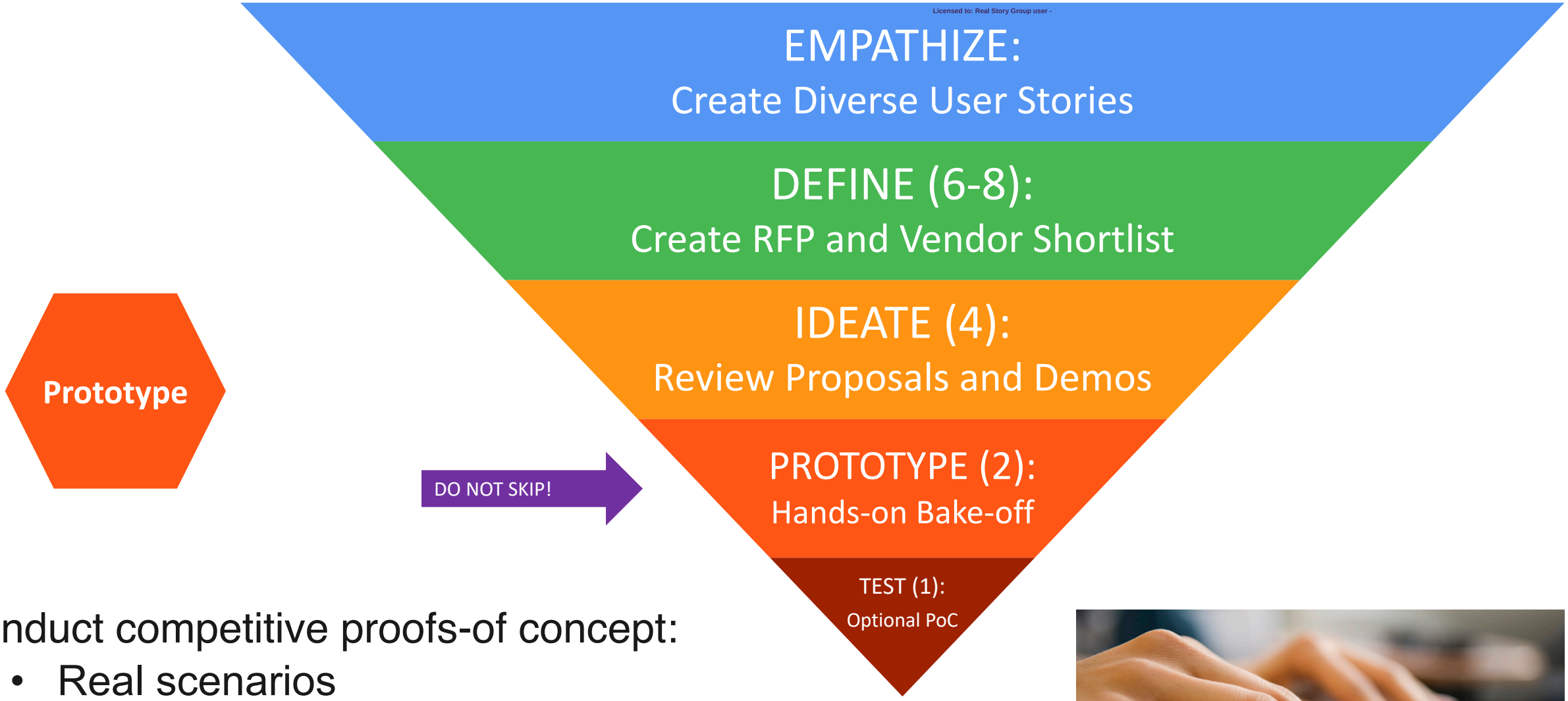
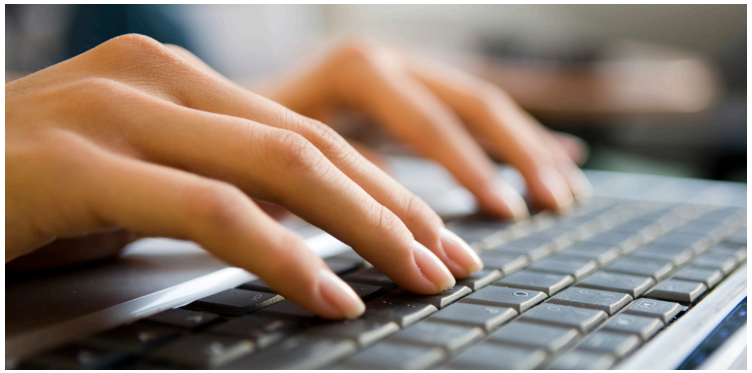


Conduct competitive proofs-of concept:

- Real scenarios
- Real (“dummy”) data
- Real people
- Real environment



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Key Architectural Decisions

CDP Marketplace

The Right Way to Select a CDP

Key Take-Aways

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Key Take-Aways

1. CDPs are increasingly foundational to a truly omnichannel stack
2. You need to consider proper scope of CDP in your particular stack
3. CDP Marketplace likely to remain fragmented for some time
4. Large vendors starting to play, but continue to lag
5. Use architecture as filter, but **business scenarios** as your prime criteria
6. There are many different scenarios: you'll want to prioritize
7. Employ an agile-oriented selection process featuring adaptive testing
8. Try before you buy, even if that's labor intensive
9. RSG research and advisory will help you make the right decisions

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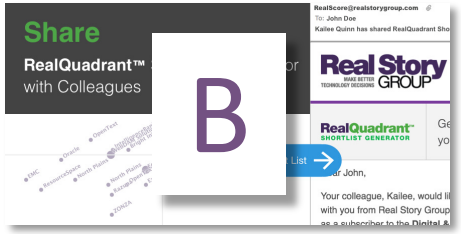

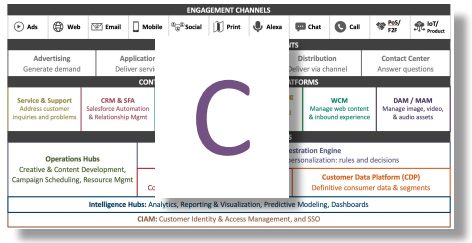

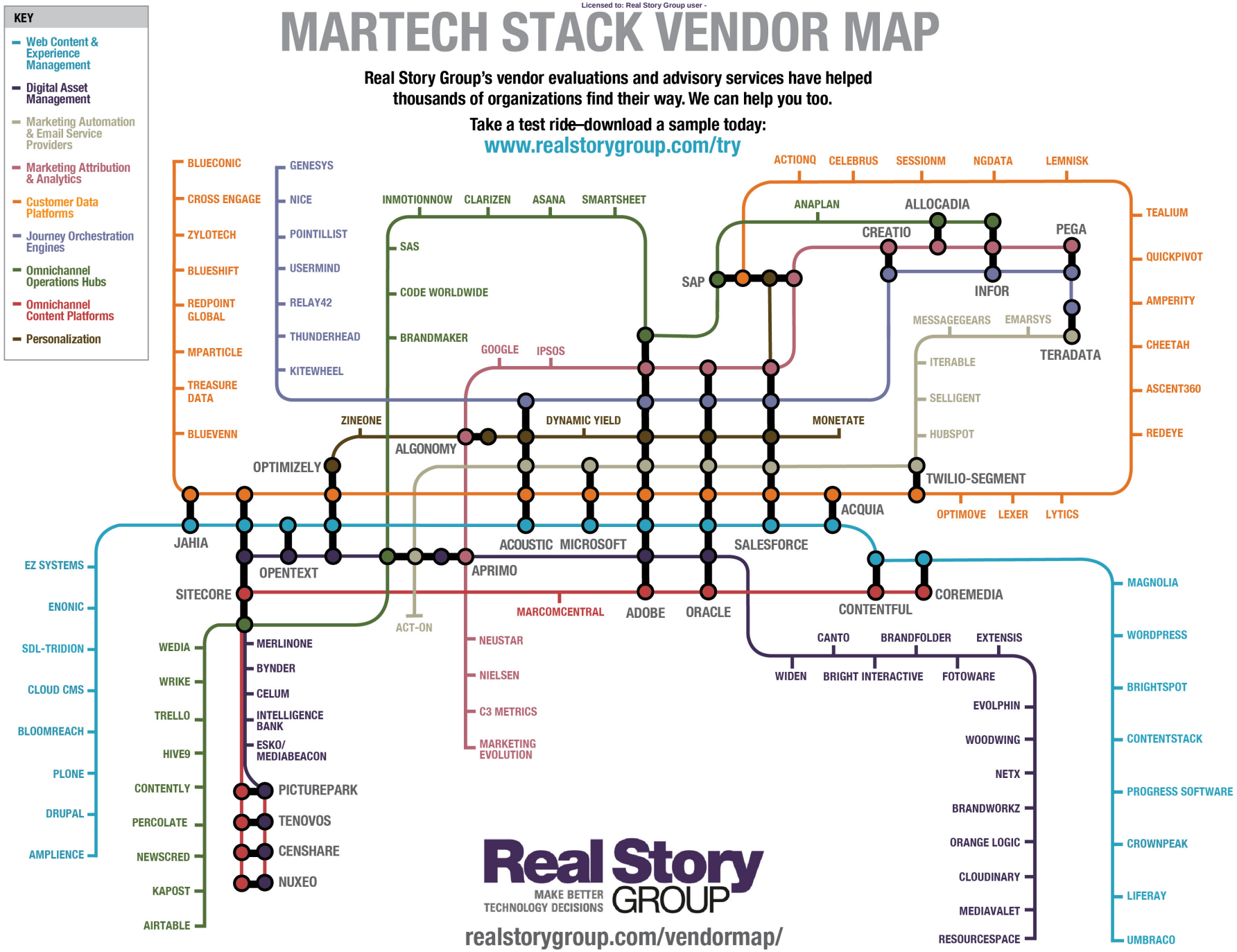

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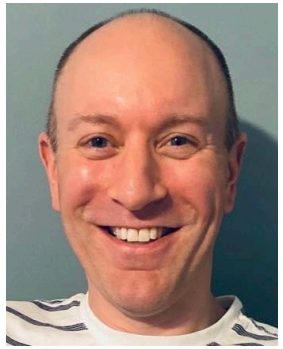
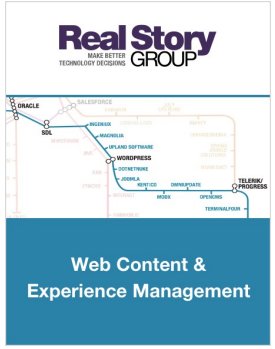
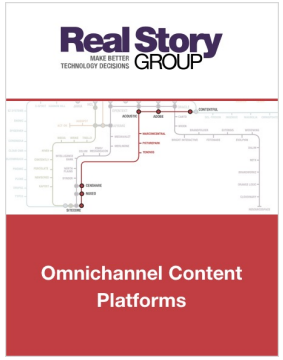
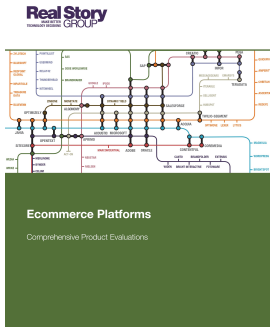
Stay in Touch…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