TEALIUM

CDP Starter Kit For Healthcare

Everything you need to successfully plan, evaluate, and implement your CDP

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State of the Industry

Today, patients and consumers not only desire, but expect the same experiences from their healthcare provider that they receive across other industries. More than ever, it is critical for providers to digitally enable their patients wherever they may be.

The good news is, you've already got all the customer data you need to succeed. Now it's time to put it to work with the right technology, strategy, and team that will take your customer experience to the next level.

We understand there's a lot to consider when deciding to invest in a new tool. In more good news — you don't have to go through this alone! This CDP Starter Kit is here to help you plan for, evaluate, and build a comprehensive strategy around buying and implementing a customer data platform.

The CDP of the Future

CDPs are a relatively new technology, and marketers and technical teams are still working out which use cases make the most sense for them. But in the last two years, teams made significant progress toward more effectively integrating CDPs into their operations.

In 2022 and beyond, CDPs will be increasingly foundational to the martech stack. They'll adapt flexibly to new regulations, continue to underpin customer acquisition and retention strategies and enable powerful AI and machine learning capabilities. To set themselves up for success, marketers should look for CDPs that:

1. **Are highly flexible**
   Faster, easier integration with the tools you already have (or might adopt in the future) will speed time to value and increase overall ROI.

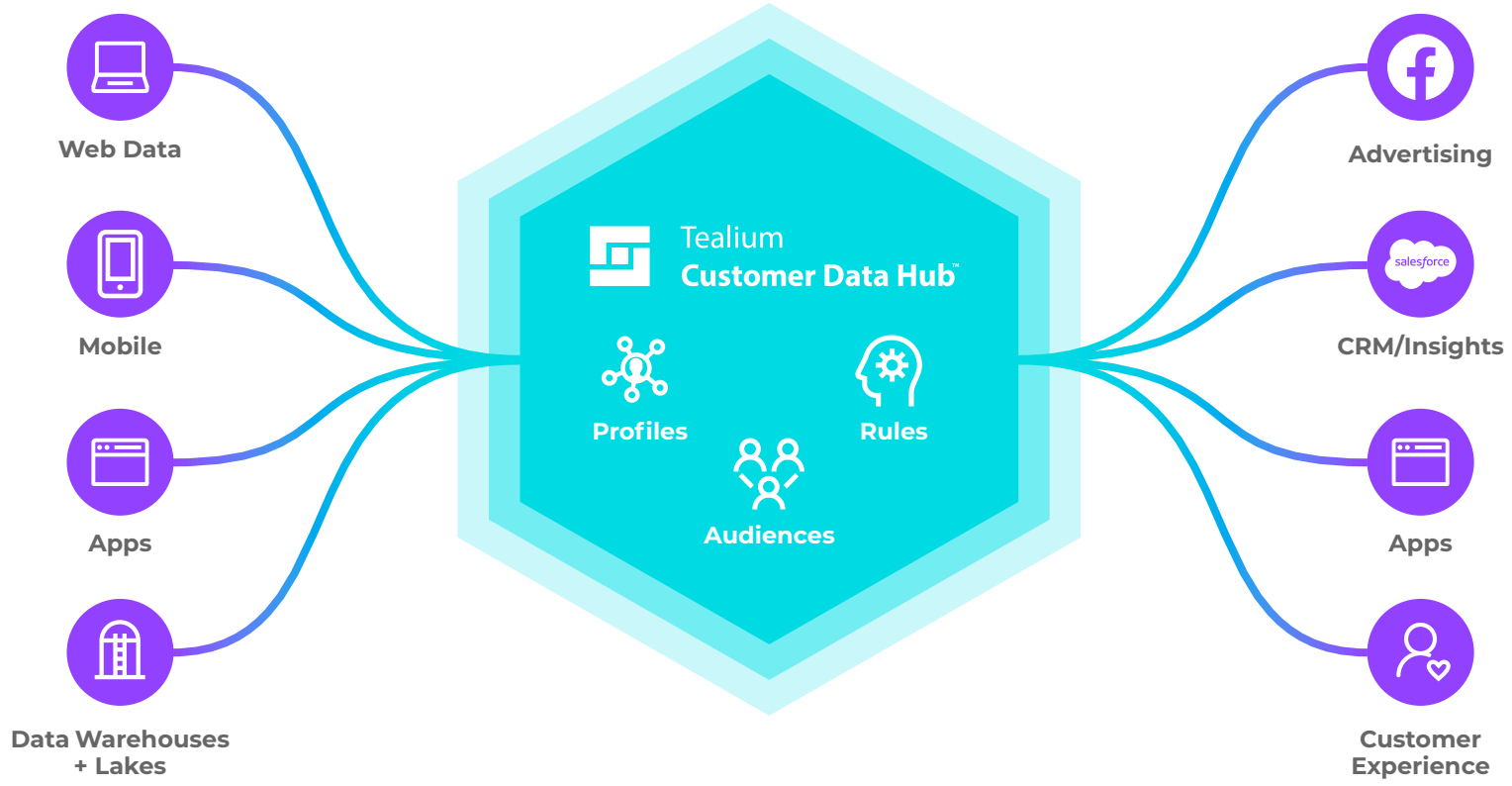
2. **Offer predictive insights**
   User-friendly AI capabilities will empower marketers to deliver standout customer experiences.

3. **Protect data privacy**
   Capabilities like data encryption and consent management keep organizations compliant with global and regional regulations.

4. **Are a trusted partner**
   The challenges you encounter are specific to your organization. You don't want to just pick a vendor, you want to select a dedicated partner that is there every step of the way to help you achieve your business goals.

CDP Defined by Tealium

"A CDP is a technology that collects data in a governed way from sources like web, mobile, in store, call center, and IoT, unifies it to create accurate customer profiles in real time, then makes it accessible to and actionable for other tools and technology."



Data
Collect from key sources

Decisions
Unified view of customer with key insights

Deliver
Orchestrate insights to the tools you love

Checklist — Considerations As You Look to Launch a CDP

The overview below are recommendations from organizations that have adopted a CDP and are seeing strong success.

1 – The basics

- You have identified a set of business problems and supporting use case(s) that warrants the technology. For example, you want to create a unified customer experience to help impact growth within key customer segments.
- Your company uses several to many channels to market to buyers and needs that data to make decisions.
- Your company is interested in tackling organization-wide challenges like data governance (CCPA, GDPR).
- Your company would benefit from delivering real-time customer experiences to improve personalization efforts, cross-channel campaigns, and governance and privacy initiatives.

2 – Customer journey

- You have a multi-channel customer experience, like point of care plus website, apps, call center, and social media that you want to optimize and ensure is more relevant. For example, you want to combine your online and offline data into a unified profile to enhance your understanding of every customer across every touchpoint.
- You want to understand the customer journey more than your CRM can provide. For example, you want to collect and use data that doesn't live in your CRM.
- You are looking to achieve personalization and targeted advertising at scale.

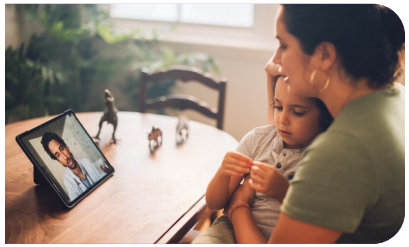
3 – The team

- You have identified a strategic owner in a Marketing, IT, or data science/related department. Customer data often involves different departments, so best in class companies often set up cross functional project teams to ensure alignment and common goals.
- You have a team to drive implementation and execution of use cases. A small, focused, core team can achieve just as much as a large team.

4 – The data culture

- Your company is interested in driving business goals from customer data insights.
- Your company sees customer data as a strategic asset.
- Your company is thinking about the future of data governance and privacy.

The Benefits of a Customer Data Platform



Personalize the patient and member experience to meet their rising expectations

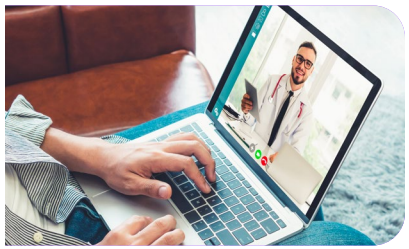
Using a CDP to unify patient and member data, healthcare professionals can communicate with any member or patient in his/her preferred channel (online or offline) — with information that's highly relevant and timely to the situation. When you coordinate care access, benefits navigation, and other parts of the healthcare journey through a single point of control, patients are met with a seamless, consistent, compelling experience across digital and physical touchpoints.

Leverage first-party data to optimize patient and member acquisition

Customer Data Platforms enable healthcare organizations to better understand and act on real-time data about your healthcare customer. With this unified customer insight you can design experiences, advertising and even ongoing support that are personalized to individual consumers, free of friction and consistent with real-time information — all leading to highly relevant engagement and cost-effective acquisition.

Eliminate data silos while speeding time-to-value

The value of customer data extends across a business. CDPs give teams the ability to access and leverage customer data across departments accurately and effectively. A CDP will break down and overcome data silos from all internal and external data sources by quickly and easily integrating with your existing technologies to help you better understand customer behavior across channels and build personalized customer experiences — all while maintaining strong governance to make sure your team is protected in the most efficient way possible.



Ensure complete and trusted data to build long-term trust and reduce regulatory compliance risk

With the help of a data-first CDP like Tealium, healthcare organizations can establish a complete, privacy-centric data foundation to obtain, maintain, and respect consent throughout the customer lifecycle.

Tips for Buying a CDP

Buying a CDP is a lot like buying any other technology — it is important to have some ideas around how you want to use the platform. It helps to identify use cases — then build the business case, evaluate the vendors, go through procurement, and lastly, move on to implementation and enablement. It is also largely beneficial to identify the cross-functional team that will own the technology.

Problem Identification

This is the "we need to do something" step. You've realized there is a problem or use case that is not being met and a solution must be found.

Foundational Use Cases

When Ben Thompson, a Director of Ecommerce Analytics and Tag Management at an online retailer, first got started with a CDP, he faced internal resistance from several directions. The IT team wanted to build an alternative solution. The Business Intelligence team wanted to control customer data. Marketing and campaign operations felt threatened. To help quell fears and prove the cross-functional value of the Customer Data Platform, Thompson and his team sought out one killer use case to start out with.

They found it by looking for a team that was struggling to achieve a goal because of technical limitations. That use case was being able to tie a single-use promotion code to a single user in real time. To limit coupon codes from going wild on the internet, the E-commerce team uses their CDP to tie these codes to individual profiles. They deploy the code through their Email Service Provider by grouping audiences together; for example, the code can be triggered for customer profiles that have just abandoned their cart. Now, the customer can come back to complete the purchase without the code running wild.

CDP STORY: 'This use case alone,' Thompson said, 'brought many people onto the CDP bandwagon, as it's something they've wanted for a very long time.'

Nailing the RFP

A successful RFP will help you gather information about a new technology, define and prioritize requirements from the perspective of customer use cases, and enable you to compare vendors on an equal footing. With CDPs, one of the best unique practices we encourage is undergoing a Martech Assessment.

A Martech Assessment can be done internally or with an agency partner to provide a neutral, third-party view. The Martech Assessment is designed to find the gaps in your current martech stack. With a technology as plugged into your martech as the CDP, this assessment will help reveal what critical integrations you'll need to validate in your vendor selection process.

The Martech Assessment will also show you what CDP-like capabilities you have already and enable better proof-of-concepts and a stronger implementation strategy. Since there are many technologies that ostensibly do parts of what a CDP can do, you'll need a clear plan for how these technologies will work together without duplicating operations or creating shadow data silos.

On the last page of this booklet, we provide our own RFP Primer to help you narrow down the vendors for your shortlist, while taking stock of your own organization's needs and capabilities.

Getting Buy-In

One of the most challenging parts of buying a CDP can be getting buy-in across the organization. Since the CDP is (or should be) a long-term investment, many stakeholders will need to sign off in some form.

The following pages on "Building the Business Case" provide more details on how to approach getting cross-functional buy-in.

Aligning Your Organization

With your foundational use cases in place, you can determine the skills you'll require to achieve them. Our customers have found establishing a cross-functional implementation team is key to getting up and running quickly. This ensures that you don't miss engaging someone who you'll later need to depend on to assign resources to the project.

To help keep things organized, people need to know where they'll be expected to get involved. We've identified four groups to help you staff your CDP dream team.

1. **Data source experts** — These are often developers, system admins, solutions architects, business intelligence, or data governance staff — and their buy-in is critical. They're responsible for how data comes into your CDP through touchpoints where customers are engaging with your brand, such as your website, mobile app, paid marketing, and social media.

   Titles may include: Developer/ IT Engineer, Analytics, Business Intelligence Analyst, Solutions Architect, Data Governance Manager

2. **Audience experts** — These are typically customer data and analytics or data governance staff. They know how to aggregate and enrich your data in its raw form, and send it where it needs to go. These team members often drive the push for a CDP, because they understand data and how to tie it back to user experience.

   Titles may include: Data Governance Manager, Data Analyst, Digital Analyst, Engagement Analyst

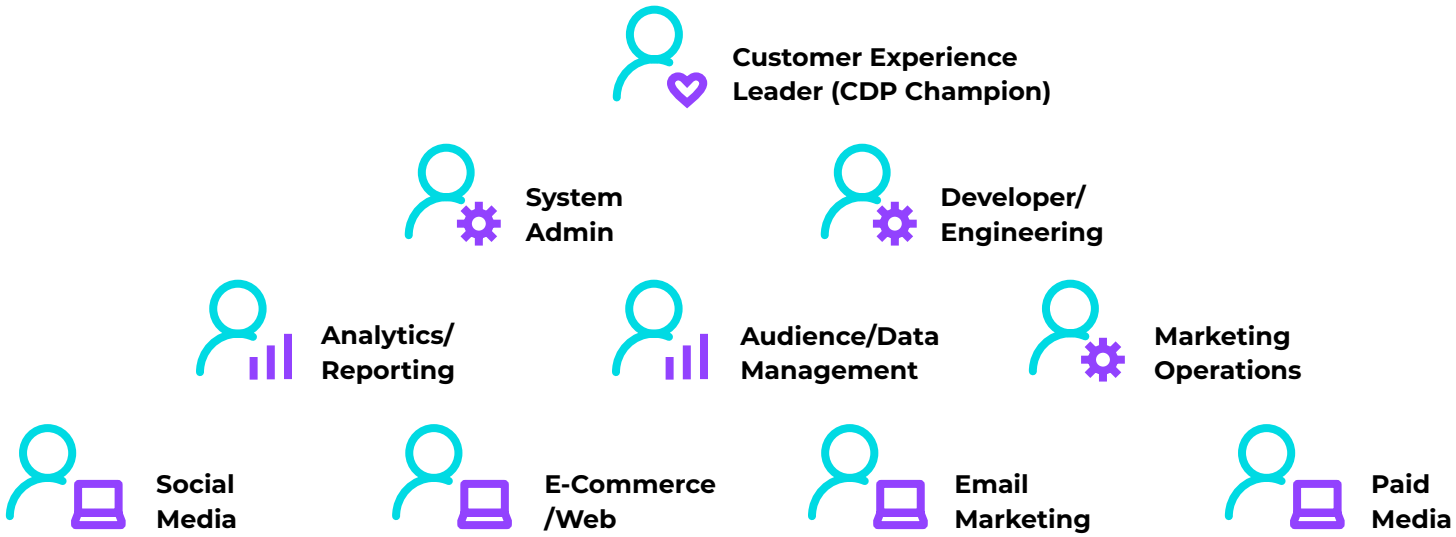
3. **Channel Marketing experts** — This group includes channel managers, strategists, marketing operations, experience architects, or data analysts. They receive data from your CDP and use customer profiles to enhance the impact of your other marketing tools. These experts are usually eager to see how they can segment customer profiles more accurately, and will drive the vision for your CDP.

   Titles may include: Digital Strategist, Paid Media Manager, Email Marketing Manager, Content Marketer, Social Media Marketing Manager, Experience Architect, Marketing Operations

4. **Agency partners and marketing technologists** — These individuals can be involved from end to end in the previous three categories, or play a larger role in one space.

   Titles may include: Agency / Technology partners, Marketing Technologist

Below is a visual representation of these stakeholders. Chances are pretty good you have most or all of these functions already in place. In some cases, one person may fulfill multiple roles:



It's important that your organization has a common understanding of what you intend to accomplish with your CDP. You can foster this collective knowledge in three steps to ensure solid adoption and expansion as you begin to use the technology.

Educate — Conduct exploratory interviews to get stakeholders' input, and develop a unified understanding of your company's challenges and objectives—including the capabilities people expect from the CDP.

Motivate — Highlight the opportunities a CDP will offer your company, such as a unified view of your customers and better ROI on your other marketing tech.

Align — Create a strategic objective framework by mapping the project goals to your organization's.

Purchase Decision

Congratulations! At this point, you've selected the right vendor based on your goals, use cases, and requirements.

Building a Business Case

Marketing Teams

Build a business case for marketing around personalization, engagement, or to solve challenges like third-party cookie loss, and as a bonus, show how the CDP can improve the technology they're already using / invested in.

Metrics they need to see to evaluate success:

- Customer Growth (Marketing/Sales Qualified Leads and Lead Conversion)
- Customer Loyalty (Customer Lifetime Value)
- Marketing Efficiencies (Customer Acquisition Cost)
- Marketing Technology Utilization and Marketing Return on Investment)

IT Teams

Show how the CDP can bring better standards to many tools by providing a single view of the customer and unified audience management and make work more efficient by lightening the load on IT as common data management processes become automated.

Metrics they need to see to evaluate success:

- Bottom Line Impact (Return on IT Investment)
- Operational Efficiencies (Total Cost of Ownership, Time to Value, Utilization of Key IT Managed Resources, Staffing Efficiencies)
- Security and Risk Mitigation (Number of Incidents, Cost Per Incident and Resolution Time)

Finance Teams

With so much money having been spent on martech, you'll need to be able to quantify marketing activities to show ROI.

Show the value of the CDP on your revenue generation and cost savings, but also show how it can help make the temperamental process of attribution into a more exact science. They'll thank you for better showing them the financial impact of technology and teams beyond the CDP directly.

Understand the metrics they need to see to evaluate success:

- Bottom line metrics for positive business growth (Marketing and Sales Qualified Leads) and revenue (Gross Profit and Average Gross Margin)
- Marketing Efficiencies (Customer Acquisition Cost, Marketing Technology Utilization and Marketing Return on Investment)

Technology Teams

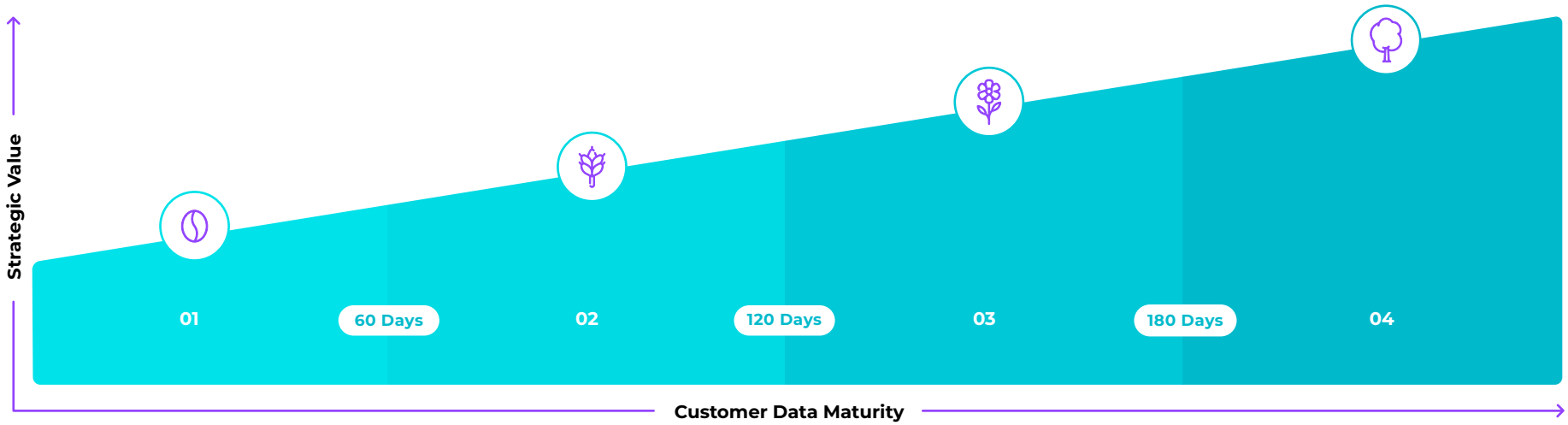
Technology is often seen as a cost-center. These teams will want to understand the Total Cost of Ownership (TCO) and the long-term implications of the CDP to the larger tech ecosystem.

Show how the CDP can bring better standards to many tools by providing a Single View of the Customer and unified audience management and make work more efficient by lightening the load on IT as common data management processes become automated.

Understand the metrics they need to see to evaluate success:

- Bottom Line Impact (Return on IT Investment)
- Operational Efficiencies (Total Cost of Ownership, Time to Value, Utilization of Key IT Managed Resources, Staffing Efficiencies)
- Security and Risk Mitigation (Number of Incidents, Cost Per Incident and Resolution Time)

Crawl, Walk, Run Approach to CDPs



01 ADOPTION

Customer journey stage 1

- Define and integrate data sources
- Data quality specs
- Define core use cases, attributes and audiences
- Define privacy and consent data

02 GROWTH

Customer journey stage 2

- Automate actions using audiences for core use cases
- Expand data sources
- Add file upload, POS data sources
- Expand email, analytics and other integrations

03 OPTIMIZATION

Complete customer journey

- Increase customer data supply chain visibility
- Create a more comprehensive view of the customer
- Orchestrate data across the customer lifecycle
- Distribute regulatory compliance through the supply chain
- Anticipate customer behavior and take proactive actions with machine learning

04 EXPANSION

Scale use cases

- Add more data sources
- Fully automate with business rules
- Expand use of machine learning insights
- Optimize the tech stack
- Focus on future-proofing your customer data

Use Cases to Get You Started

Single view of the customer

Achieving a single view of the customer may seem like a use case that is only really valuable to marketing, but it's key for data and analytics teams to drive timely actions and derive relevant insights throughout the customer journey. As the upstream source of the single view of the customer for your downstream activation technologies, you're removing much of the manual labor that would be required to update each one individually — and doing so in real time.

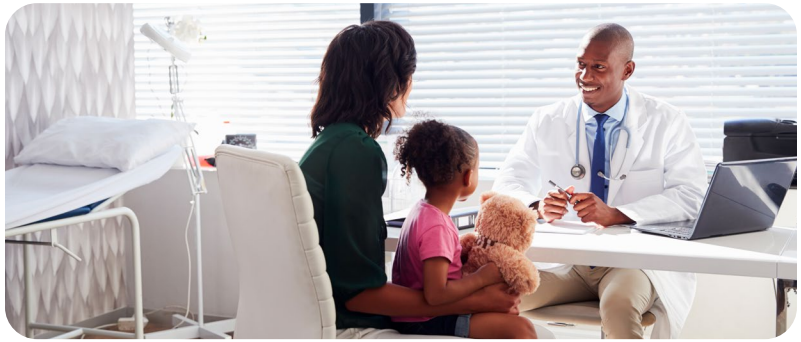
Customer acquisition

One of the most powerful ways that marketers use a CDP is for customer acquisition. Specifically, building audience segments using cross-channel data to better target prospects. Customer insights that would normally only exist in one channel — like your mobile data—can now inform other channels to create more personalized ad and content recommendations.

Honoring consumer consent in every channel

Whether it's GDPR, CCPA, or another privacy regulation, consumers now have many different ways to opt-in and opt-out of data collection, data usage, and contact methods. CDPs aren't responsible for getting consent from your customers (that's what Consent Management Platforms are for), but consent data can be tied into the customer profile to update preferences and act immediately to remove customers from the audiences and channels they've opted out of.

Customer Stories



The Effectiveness of Quality Data for nib Health Funds in a Competitive Landscape

With Tealium's Customer Data Hub as the foundation of their data transformation, nib Health Funds created an ongoing data framework to nurture and qualify leads from multiple lead capture sources, including affiliates and online, that fail to be converted via the call center. They were also able to enable their internal teams to quickly create campaigns, without relying on third-party agencies.

After implementing the Tealium CDH, in just over 12 months, nib Health Funds had significant positive outcomes.

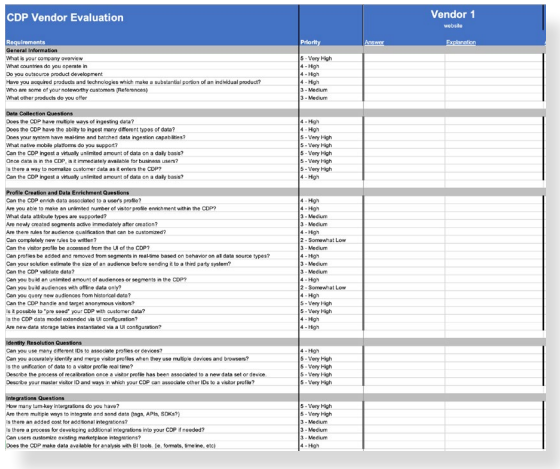
- 16 automated campaigns live
- +13% share of sales online
- +90% more 'qualified' leads
- 50M+ events tracked

Humana's playbook for better personalization

Humana uses AudienceStream CDP to help navigate privacy, collection and segmentation throughout their customer's journey. They're focused on using data to make it easier for consumers to find and consume what they want, how they want it, and when they want it.

With Tealium, Humana experienced a 20% lift in enrollments through personalization and segmentation.

RFP Template



CDP Vendor Evaluation		Vendor 1 website	
Requirements	Priority	Answer	Explanation
General Information			
What is your company overview	5 - Very High		
What countries do you operate in	4 - High		
Do you outsource product development	4 - High		
Have you acquired products and technologies which make a substantial portion of an individual product?	4 - High		
Who are some of your noteworthy customers (References)	3 - Medium		
What other products do you offer	3 - Medium		
Data Collection Questions			
Does the CDP have multiple ways of ingesting data?	4 - High		
Does the CDP have the ability to ingest many different types of data?	4 - High		
Does your system have realtime and batched data ingestion capabilities?	5 - Very High		
What native mobile platforms do you support?	5 - Very High		
Can the CDP ingest a virtually unlimited amount of data on a daily basis?	5 - Very High		
Once data is in the CDP, is it immediately available for business users?	5 - Very High		
Is there a way to normalize customer data as it enters the CDP?	5 - Very High		
Can the CDP ingest a virtually unlimited amount of data on a daily basis?	4 - High		
Profile Creation and Data Enrichment Questions			
Can the CDP enrich data associated to a user's profile?	4 - High		
Are you able to make an unlimited number of visitor profile enrichment within the CDP?	4 - High		
What data attribute types are supported?	3 - Medium		
Are newly created segments active immediately after creation?	3 - Medium		
Are there rules for audience qualification that can be customized?	4 - High		
Can completely new rules be written?	2 - Somewhat Low		
Can the visitor profile be accessed from the UI of the CDP?	3 - Medium		
Can profiles be added and removed from segments in realtime based on behavior on all data source types?	4 - High		
Can your solution estimate the size of an audience before sending it to a third party system?	3 - Medium		
Can the CDP validate data?	3 - Medium		
Can you build an unlimited amount of audiences or segments in the CDP?	4 - High		
Can you build audiences with offline data only?	2 - Somewhat Low		
Can you query new audiences from historical data?	4 - High		
Can the CDP handle and target anonymous visitors?	5 - Very High		
Is it possible to "pre seed" your CDP with customer data?	5 - Very High		
Is the CDP data model extended via UI configuration?	4 - High		
Are new data storage tables instantiated via a UI configuration?	4 - High		
Identity Resolution Questions			
Can you use many different IDs to associate profiles or devices?	4 - High		
Can you accurately identify and merge visitor profiles when they use multiple devices and browsers?	5 - Very High		
Is the unification of data to a visitor profile real time?	5 - Very High		
Describe the process of recalibration once a visitor profile has been associated to a new data set or device.	5 - Very High		
Describe your master visitor ID and ways in which your CDP can associate other IDs to a visitor profile?	5 - Very High		
Integrations Questions			
How many turnkey integrations do you have?	5 - Very High		
Are there multiple ways to integrate and send data (tags, APIs, SDKs?)	5 - Very High		
Is there an added cost for additional integrations?	3 - Medium		
Is there a process for developing additional integrations into your CDP if needed?	3 - Medium		
Can users customize existing marketplace integrations?	3 - Medium		
Does the CDP make data available for analysis with BI tools. (ie. formats, timeline, etc)	4 - High		

A CDP is an investment in the long-term success of your business's customer engagement strategy. Selecting a vendor who is well equipped to not only meet your goals today but also become a partner for the road ahead is key.

Tealium's comprehensive Customer Data Platform RFP template will help your organization understand how a new solution will align with your processes, evaluate vendors, score and weight capabilities and get you started with over 100 key questions you should be asking.

Get the template here!
Scan or visit tealium.com/cdp-rfp-template/

TEALIUM

We Connect Data So You Can Connect With Your Customers

Tag Management • API Hub • Customer Data Platform and Machine Learning • Data Management

Tealium connects customer data across web, mobile, offline, and IoT so businesses can better connect with their customers. Tealium's turnkey integration ecosystem supports more than 1,300 built-in connections, empowering brands to create a complete, real-time customer data infrastructure. Tealium's solutions include a customer data platform with machine learning, tag management, an API hub and data management solutions that make customer data more valuable, actionable, privacy-compliant and secure. More than 850 leading businesses throughout the world trust Tealium to power their customer data strategies.

For more information, visit www.tealium.com.