

The 5 Key Steps to Customer Data Platform (CDP) Success

How to Prepare, Staff, and Measure
ROI for Your CDP Strategies



The 5 Key Steps to CDP Success

- 01 Assemble and align stakeholders
- 02 Gather information and formulate objectives
- 03 Determine your segments and ID resolution strategy
- 04 Define your action plan
- 05 Monitor progress



STEP 01

Assemble and Align Stakeholders

Assemble the team

You don't need to be Nick Fury to assemble the right, Avengers-level team for implementing and running your Customer Data Platform. A small, focused, core team can achieve just as much as a large team.

This team can take on many forms, everything from an ad-hoc group in smaller companies to Centers of Excellence in Fortune 500 corporations. At the heart of your CDP team, though, are likely your data-first marketers, an emerging group of marketers with foundational skills in data orchestration, automation, and workflow building.



Data-first: the quality of valuing data as a primary source for making decisions in business.

The skillset of the marketer is evolving. Marketers are not just creators now—they're also data-minded, driven by process, testing, and optimization. Whether you're building the team internally or hiring, these skills and habits will be critical markers for your core CDP operators.

Team essentials

- 01 Cross-functionality is key
- 02 It's okay for single members to have multiple roles
- 03 External agency and technology partners are always welcome



Marketers

are not just creators now—they're also data-minded, driven by process, testing, and optimization.



Establish cross-functional roles

These roles can be organized into four main groups for your CDP initiative:

01

Data source experts

The roles responsible for the data coming into the CDP.

- **Developers**
- **Solution Architects**
- **Business Intelligence**
- **Data Governance**

02

Channel experts

The people who are responsible for putting the insights coming out of the CDP to work through your various customer experience channels.

- **Channel managers**
- **Strategists**
- **Marketing operations**
- **Experience architects**
- **Data analysts**

03

Customer experts

These roles sit between the Data Source Experts and Channel Experts, they are the people who are responsible for tying customer data to the customer experience to help them understand the impact of programs and the experience of the brand.

- **Customer data and analytics**
- **Data Governance**

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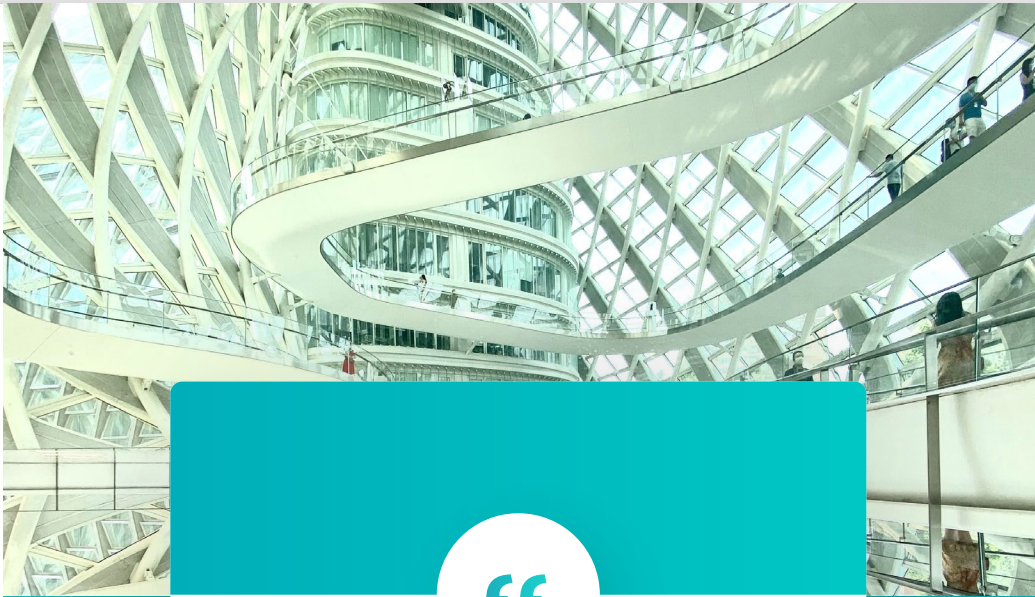
Data Source Experts are the stakeholders most commonly left out of early conversations when buying a CDP. Their buy-in is critical to make sure you have a smooth delivery path.

Dustin Horning, Director of Customer Solutions and Delivery, Tealium

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Channel experts

The people who are responsible for putting the insights coming out of the CDP to work through your various customer experience channels.



04

Marketing technologists and agency partners

The roles that may help oversee the end-to-end application of the technology or fill in at key points.

Your team may have different titles, or come from different locations, but their roles each deal in part with the key functionality of the CDP: who’s curating the data to develop the single view of the customer, who’s deriving insights and actions from that data, who’s responsible for the integrations that hold it all together?

Beyond your core team members, there will be many stakeholders and executive sponsors that need to be aware of the impact of the CDP. Any team that has a hand in data orchestration—i.e. any team responsible for a tool your CDP will integrate with—will need to be in the loop. Your executive sponsors will be critical for enforcing the new processes from the top-down.

You need a team of collaborative, forward-thinking, and hard-working professionals.



Your executive sponsors will be critical for enforcing the new processes from the top-down.

Teams will vary by company and industry and may include a combination of the following roles:

Customer experience leader: The program lead - has the seniority to get top-level executive buy-in and the ability to direct marketing, operational, and IT efforts.

Experience architect: A User Experience (UX) designer with strong Customer Experience (CX) acumen, who designs and may even govern the CX through connected digital channels.

Paid media manager: Develops, maintains, and optimizes paid media campaigns.

Email marketing manager: Develops, maintains, and optimizes your Email Service Provider (ESP). May include season campaigns, drip campaigns, and other triggered email communications.

Content marketer: Works closely with your digital strategist, experience architect, and other team members to create all content for your site.

Social media marketing manager: Designs and controls the social image of your company and maintains your social presence. Responsible for paid social and earned social media.

Digital strategist: Develops cross-channel digital strategies. Responsible for developing business cases for your marketing initiatives.

Marketing technologist: A newer role that works alongside a digital strategist to implement and optimize marketing tactics. Ideally requires hands-on experience in website optimization, analytics, marketing automation, or e-commerce.

Marketing operations: Measures and optimizes marketing efforts. Technical knowledge and an excellent understanding of marketing tactics are required.

Analytics/BI/data analyst: Provides insights into customer journeys and intent, as well as channel and campaign performance.

Project manager: Balances timeframes, marketing needs, and organization’s capabilities to build and adhere to optimal implementation timelines.

Development/engineering: Implements and updates web or application code to facilitate tracking and personalization.

Agency partners: Partners may fill many of the roles listed on this page or may be involved with various aspects including the management of specific marketing technology and software development.

Real world examples of a CDP team

COMPANY 01

Company Profile

Large, Multi-brand E-commerce Retailer

CDP goals

- Improve marketing campaigns
- Create a single view of the customer
- Real-time audience segmentation
- Removing data silos to enable better personalization



Team structure for an e-commerce retail company



Before buying our Customer Data Platform, we formed a steering committee from all the departments it might impact. It's been really helpful to have all of these groups know how to speak the CDP 'lingo,' even the ones who aren't involved in day-to-day operations, because it streamlines related projects and requests with everyone on the same page.

Ben Thompson, Director of E-commerce Analytics and Tag Management

COMPANY 02

Company Profile

Small E-commerce Retailer

CDP goals

- Improving digital marketing initiatives
- Cross-sell and upsell retargeting
- Personalized emails
- Managing a multi-brand architecture

COMPANY 03

Name

Enterprise-level Technology Company

CDP goals

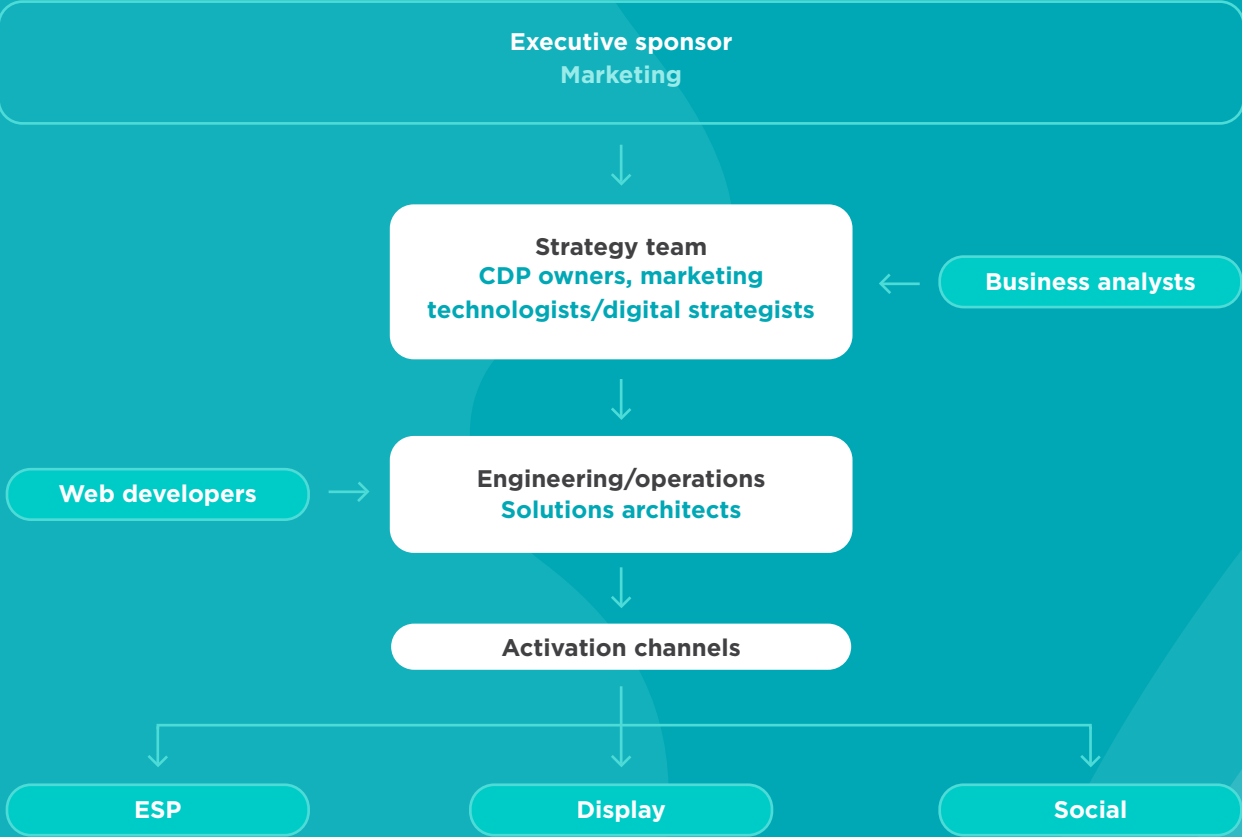
- On-site personalization
- Cross-channel attribution
- Improved customer journey mapping



Team structure for small e-commerce retailer



Team structure for enterprise-level technology company



Different teams for different size companies

Enterprise

Enterprise architecture can be complex. Depending on the vision for the CDP, technology can impact many different business units. If a single view of the customer (SVOC) across the organization is the guiding vision, the team will need to reflect a course for scaling the SVOC enterprise-wide. **Take retail: you may have to include merchandising, retail planning, e-commerce, and mobile teams in the CDP discussion from the start, as their operations will be impacted by the CDP’s insights.** Then, as you expand the scope of the SVOC further into the customer journey, you may need to loop in customer success and retention teams.

An enterprise company will likely benefit from a Center of Excellence to coordinate this complexity and to ensure the same standards are being enforced with customer data across the organization, but not having a Center of Excellence shouldn’t keep you from deploying. The right time to deploy your CDP is when you have a use for it.

Depending on the size of your company and the number of resources you’re able to devote to the CDP initiative, the teams can look very different.

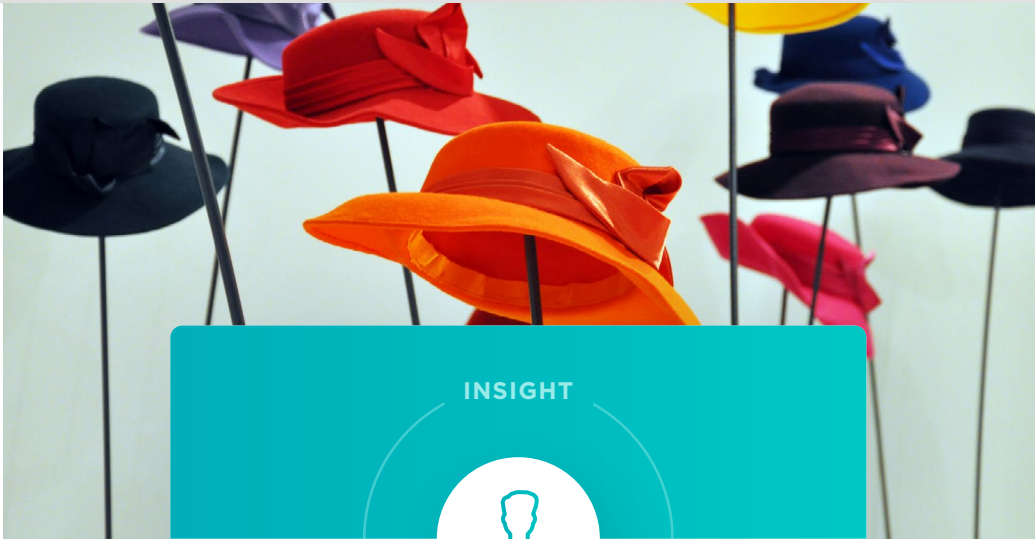
Mid-market and small businesses

Smaller organizations may not have the resources to staff a dedicated Center of Excellence. One person may wear multiple hats. But, by focusing on staffing to meet the fundamentals (CX strategy, data collection, configuring the data layer, measuring impact, managing integrations), SMBs can deliver a lot of value in a short amount of time. Once the fundamental roles are operational, other stakeholders like paid and owned media can be empowered as well.

The key for smaller organizations is to build the team and establish use cases that maximize quick value while also enabling future growth and scalability. That’s why governance is a critical component of the CDP and should be prioritized when constructing a team. **Establishing good rules, definitions, and processes will make scaling up to meet increased demand possible and make it easier to take on new use cases.**



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INSIGHT



One person may wear multiple hats

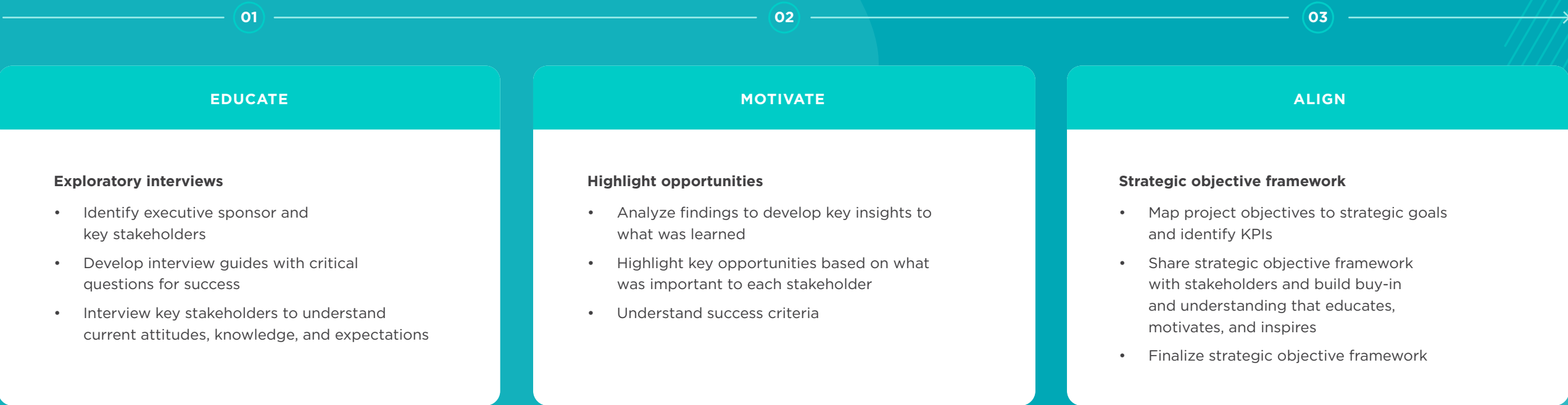
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Aligning key stakeholders

Any CDP initiative requires stakeholders from multiple departments, and getting these groups aligned early will make purchasing and implementing a CDP initiative much, much easier down the line.

It is important to educate, motivate, and align your key stakeholders. This is a group that should include an executive sponsor, IT leaders, and the marketing department to start breaking down communication

silos that may exist. Input should also be gathered from customer service, store operations, sales, and other operational support teams. **Alignment starts by educating and motivating through exploratory interviews to get input and have a unified understanding of strategic objectives, challenges, constraints, competitive imperatives, as well as current and planned capabilities.** From here you can map project objectives to strategic goals to gain stakeholder alignment.



Identify owners

As you get started you will need to determine the roles and responsibilities of project participants. These roles may evolve throughout the journey and not all stakeholders will be needed at each step. There is not a “correct” role that should own the CDP; what matters is that roles for tasks are clearly defined early on.

These tasks include:

- Determine the overall digital strategy
- Align content and experiences with overall digital strategy
- Implement and manage tactics and timeframes
- Analyze, test, and recommend optimizations of tactics

Set up a core team

Once you’ve identified owners of the various tasks, you can assemble the core team that will be responsible throughout the rest of the process. Setting up this team early not only makes everyone feel more comfortable with the resulting purchase (if that’s where you’re at), it lets you hit the ground running.



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STEP 02

Gather Information and Formulate Objectives

Formulating your strategy

A strong digital strategy should serve as a long-term roadmap for the entire organization. As such, it may overlap with a strategic plan or similar document already in use by your organization.

Work with stakeholders to define the objectives of your organization and identify where these relate to a marketing activity or customer interaction. Objectives may speak to differentiation or strategic vision and should be two-to-four-year goals. These plans should be focused on business goals and growth, not just the impact on technology.

Don't lose sight of the short-term victories, though, in your long-term planning. Introductory use cases should deliver quick value and ROI as well.

Sample objectives

- Customer satisfaction
- Profitability
- Productivity
- Growth
- Innovation

Strategic objective framework

What are your organization's top objectives and upon which of those do you believe can have the most measurable and irrefutable impact? This could be a mission statement, an ethos that guides the entire company, or simply a well-known market imperative. Work with your cross-functional team to brainstorm digital goals that will advance your strategic initiatives.

This framework or a framework that is similar will help you show the executive team exactly how unified marketing will drive strategic objectives and help the business succeed.



A strong digital strategy should serve as a long-term roadmap for the entire organization.



INSIGHT



A key tip before you get started

Understand how the success of a CDP implementation will be measured in your organization. What should you benchmark now to illustrate improvements over time? It is critical to define and get buy-in on a success definition - then you can set up the right aspects to measure over time.

Sources of information

Many organizations often overlook their legacy databases and systems that are not interconnected with the marketing group. Work with your IT stakeholders to discover what existing systems and proprietary information can assist in your objectives or serve in measuring success. Also, consider systems and information on the extreme ends of the marketing funnel.

Common examples of internal data sources include:

- Website data
- Mobile apps
- Learning management systems
- Customer relationship management tools
- Order management systems
- Customer support systems
- Call center systems
- ERP systems
- Accounting and internal reporting systems

A brief guide to data types

There’s no shortage of data for you to get into your Customer Data Platform; CDPs shine because they help you enrich customer profiles with the first-and-zero party data customers give to you through engagements, while up-leveling the value of second and third-party data. See the table on the next page to understand how each of these types of data relates to each other and—as is becoming increasingly important—your privacy initiatives.



There’s no shortage of data for you to get into your Customer Data Platform; CDPs shine because they help you enrich customer profiles.



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By using audiences

they built using a Customer Data Platform, retail group Gap, Inc. moved from a one-size-fits-all website to 87 different data-driven experiences.



Data type	What is it?	Why do I need it?	Examples
Zero-party data			
Identity data customers want you to have	The good stuff (with a side of consent)! This is the data customers give to your company in exchange for a better experience or enhanced benefits.	In a post-GDPR world, companies need more permission to engage in personalization. Having your customers authenticate— i.e. login— and share data with you amplifies the value of your first-party data and helps you maximize a data-driven CX strategy.	• Personal information • Potentially sensitive data (political opinions, for example) • Intentional behaviors • Preferences
First-party data			
Behavioral data used to enrich identity data	More of the good stuff. This is the data your company gathers from consumers interacting directly with your brand that helps enrich the identity data you've collected.	First-party data is the backbone of understanding the customer experience. With first-party data, you can analyze how consumers interact with your brand to improve the experience and deliver better engagement holistically and individually.	• Behaviors or actions from your website, app, product • Email or SMS interactions • Purchase history
Second-party data			
Behavioral data shared between companies	Not commonly used, this is the data other companies collect from consumers interacting directly with their brand. Depending on the regulation, second-party data may be considered “sold” data and subject to regulations like third-party data (see: CCPA).	You might not (often second-party data is only used in limited verticals like car manufacturers). If you work with trusted partners, it may make sense to extend your audiences and create synergistic experiences. Trade shows and webinars are two ways to accomplish this.	• Behaviors or actions from another company’s website, app, product • Email or SMS interactions • Purchase history
Third-party data			
Identity and behavior data you have to buy	Data collected by an organization that doesn’t have any direct link to the customer. Usually, the data is collected by data aggregators for the express purpose of selling it to other companies.	What was once the backbone of advertising and marketing is diminishing in value, but when used carefully it can provide targeted data to improve your campaigns. May cost you more than what you pay upfront.	• Demographics • Behavioral • Contextual

Understanding process and dependencies

Once you understand all your business goals and the possible sources of data, you'll next need to understand the processes and dependencies within your organization. This audit of how your teams and information systems interact will help you better evaluate how and where your Customer Data Platform will have an impact.

As you strive towards a single view of the customer, understanding the current state will help ensure that silos of data aren't being overlooked from being included in the customer profile. Furthermore, it will also help you identify areas that are potential data privacy liabilities.

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STEP 03

Determine Your Segments and ID Resolution Strategy

Segmentation and targeting

The value of the Customer Data Platform lies in its ability to create personalized marketing strategies at scale and with speed. Segmenting users and targeting groups according to similar demographics, firmographics, affinities, online behavior, or perceived value to your organization allows marketers to do both of these things.

Some ways to segment your customers into audiences include:

- VIPs
- Cart abandoners
- Big spenders
- Discount shoppers
- Lapsed customers
- Blog fans
- Appointment schedulers
- Marketing qualified leads
- Free trial subscribers

Having clearly-defined audiences early in the process of your CDP initiative helps set the scope of your project and makes it easier to deploy them for your foundational use cases, such as customer acquisition.

User identification strategy

There are often many ways that individuals can be identified by your company—from anonymous third-party identifiers to first-party identifiers like email addresses — but this multitude of identifications can create a fragmented customer experience. A Customer Data Platform is designed to unify known IDs into a single customer view.

By uncovering all of the ways used to identify customers along the journey, you can reveal the extent of the CX fragmentation.



The value of the Customer Data Platform lies in its ability to create personalized marketing strategies at scale and with speed.

01

Identify all known IDs

Create a list of all first and third-party identifiers used. These can be email addresses, CRM IDs, Display Cookie IDs, Lead IDs, Loyalty IDs, etc.

02

Determine where each is revealed

Next, list out where each ID is revealed. Does the ID only exist in your CRM, eCommerce platform, or POS system? Is the ID only conveyed on the web?

03

Verify where they overlap

List out which of your IDs are used across multiple areas of your business. As an example, email may exist in your CRM, website, and ESP.

04

Understand the impact

Knowing how users are identified during the customer journey helps you understand how fragmented your marketing attempts can be. This information will also help guide you toward a unified customer marketing strategy.

Channels and integrations

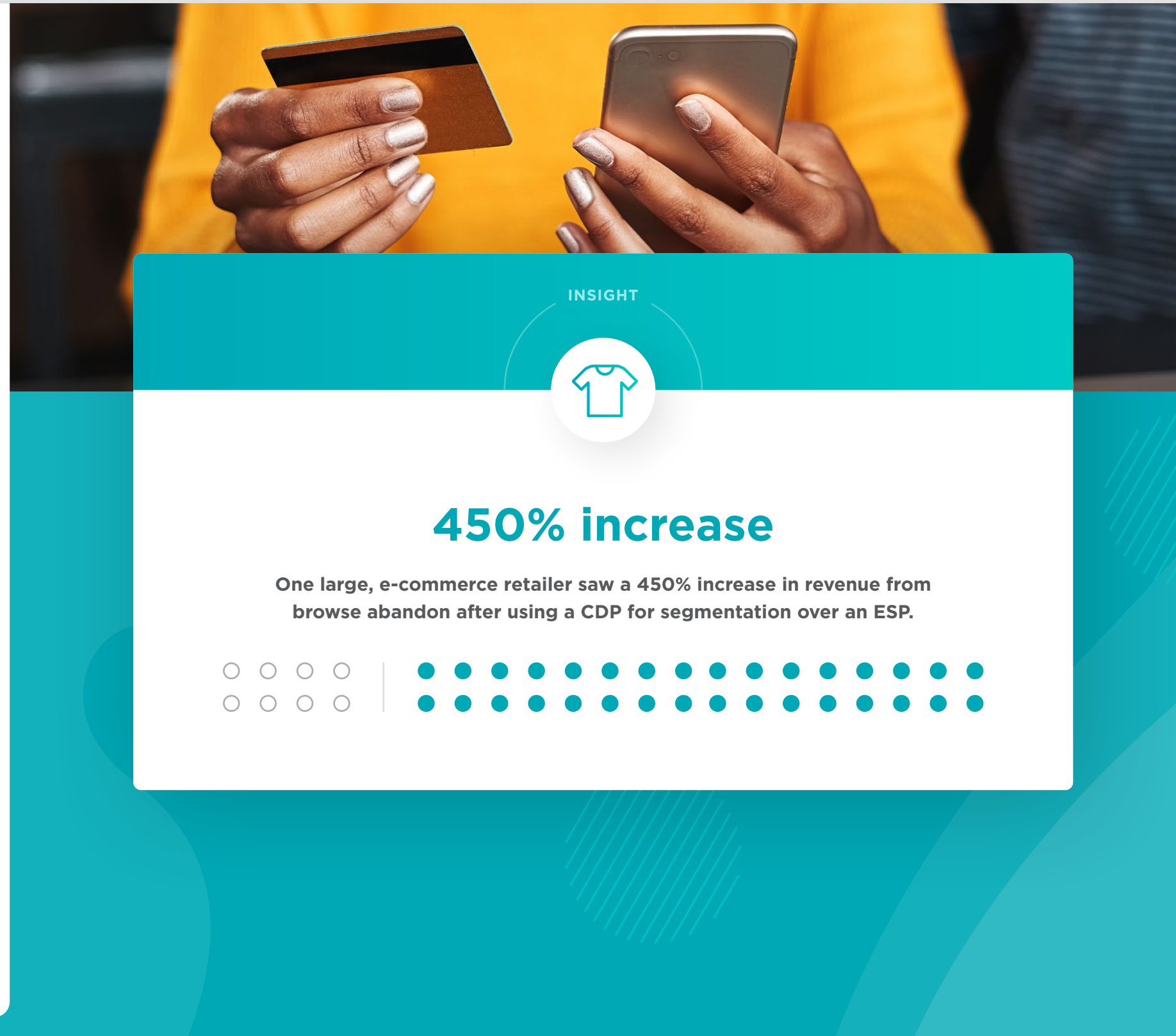
The inputs and outputs of your Customer Data Platform need to be identified. What tools are included in your Martech stack?

How are these integrated into the customer journey?

- Email Platforms
- Display Ad Networks
- Search Vendors
- CRM System
- Social Media
- Personalization Vendors
- Analytics and BI Tools
- Machine Learning

Creative needs

As you start to conceptualize your strategies across the customer journey, it's important to also think about the creative (site content, ad placements, other graphics and media) requirements for execution. As an example, if you have a multi-channel cart abandoner retargeting strategy, how many creative resources are required? What additional time and budget does that add to your plan?



Resources and budgetary constraints

When formulating your objectives, we’ve established that it is important to get stakeholder backing, mapping out the strategy, technology and creative content needs; but what also needs to be considered is the monetary support. After outlining the use cases you plan to pursue and the channels in which you plan to take action, start to consider the potential fiscal impact and be sure you’re able to fit your objectives into your larger marketing budget.

The types of questions you might start asking yourself include:

- Will I need to allocate additional spend for display platforms?
- Do I need to increase the contracted email volumes with my ESP?
- Do I want to start A/B testing my current display vendor vs. a new vendor?
- Can the time spent using my Customer Data Platform be attributed to CAPEX or will it hit overhead costs?



Consider the potential fiscal impact and be sure you’re able to fit your objectives into your larger marketing budget.



STEP 04

Define Your Action Plan

Set roadmapping expectations

By this point, you should have a good idea of how your teams, tools, and strategies will be impacted by deploying a Customer Data Platform. But that change isn't going to happen overnight. The CDP initiative's stakeholders need to come together and set expectations.

The simplest approach is to assess the level of effort vs. impact of each prospective strategy. In most cases, it is best to prioritize the projects and use cases that have the highest impact with very little resistance. Keep in mind that many other factors will likely need to be considered, such as the executive sponsor's expectations and the capabilities of the team.

Your roadmap should give you a clear direction of where to start and what your future plans hold. It's expected that the roadmap will evolve as you learn and grow as a team.

Roadmapping essentials

- Define roadmap and set expectations
- Prioritize objectives and timing - set baseline measurements to ensure you can measure success
- Clearly define roles and responsibilities
- Allow roadmap to evolve with your team

Prioritize objectives and timing

Staying focused on the business objectives—like digital transformation to improve the customer experience or meeting the requirements of customer data regulations—will help determine the timing of your projects. Work alongside your CDP vendor or a trusted agency partner to create a timeline for your company's initiative.

Whether you've created a roadmap based on your organization's needs or set the timetable according to the degree of difficulty, creating a timeline for your deployment will help you manage the changes in roles and responsibilities for your cross-functional team(s) throughout. And, if you've done a good job during the exploratory and documentary steps, there should be few surprises to derail your plan.



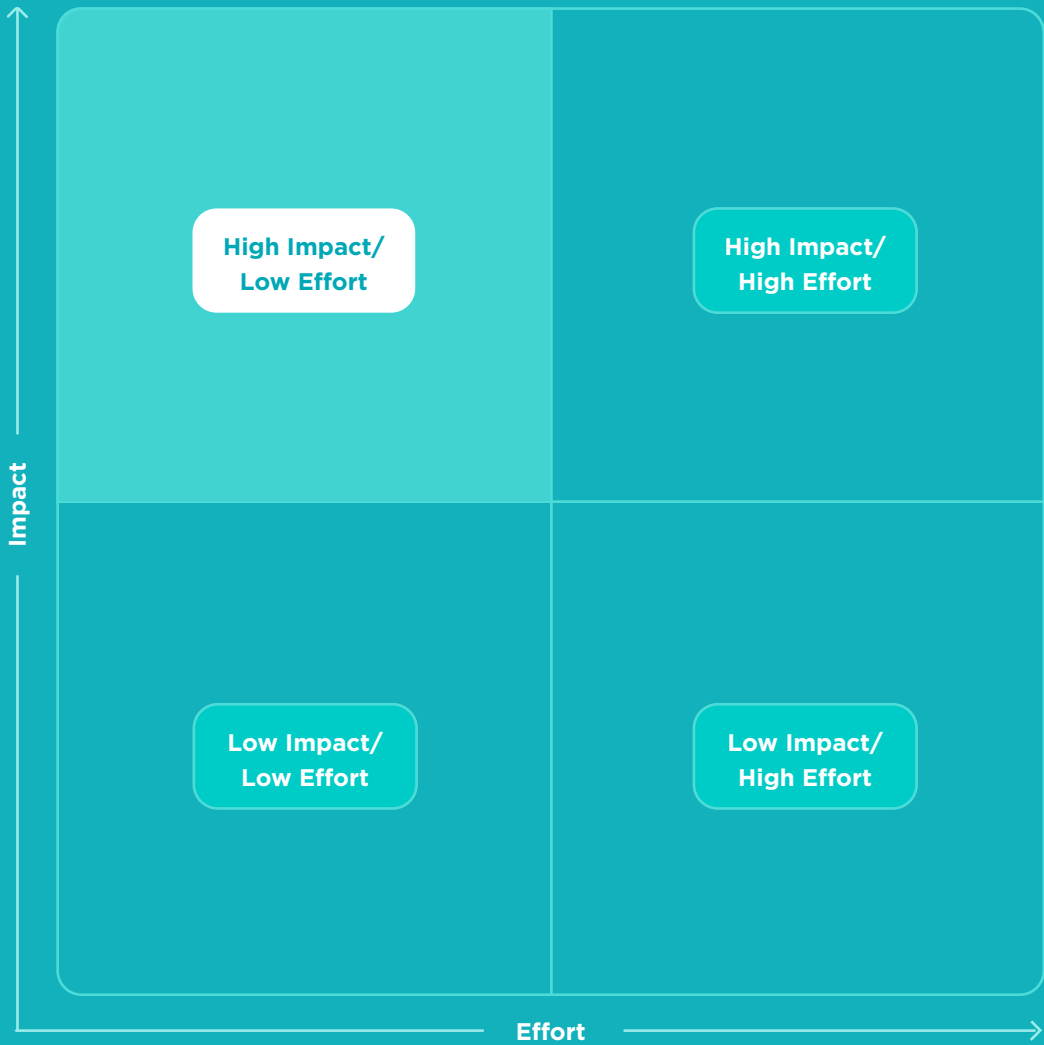
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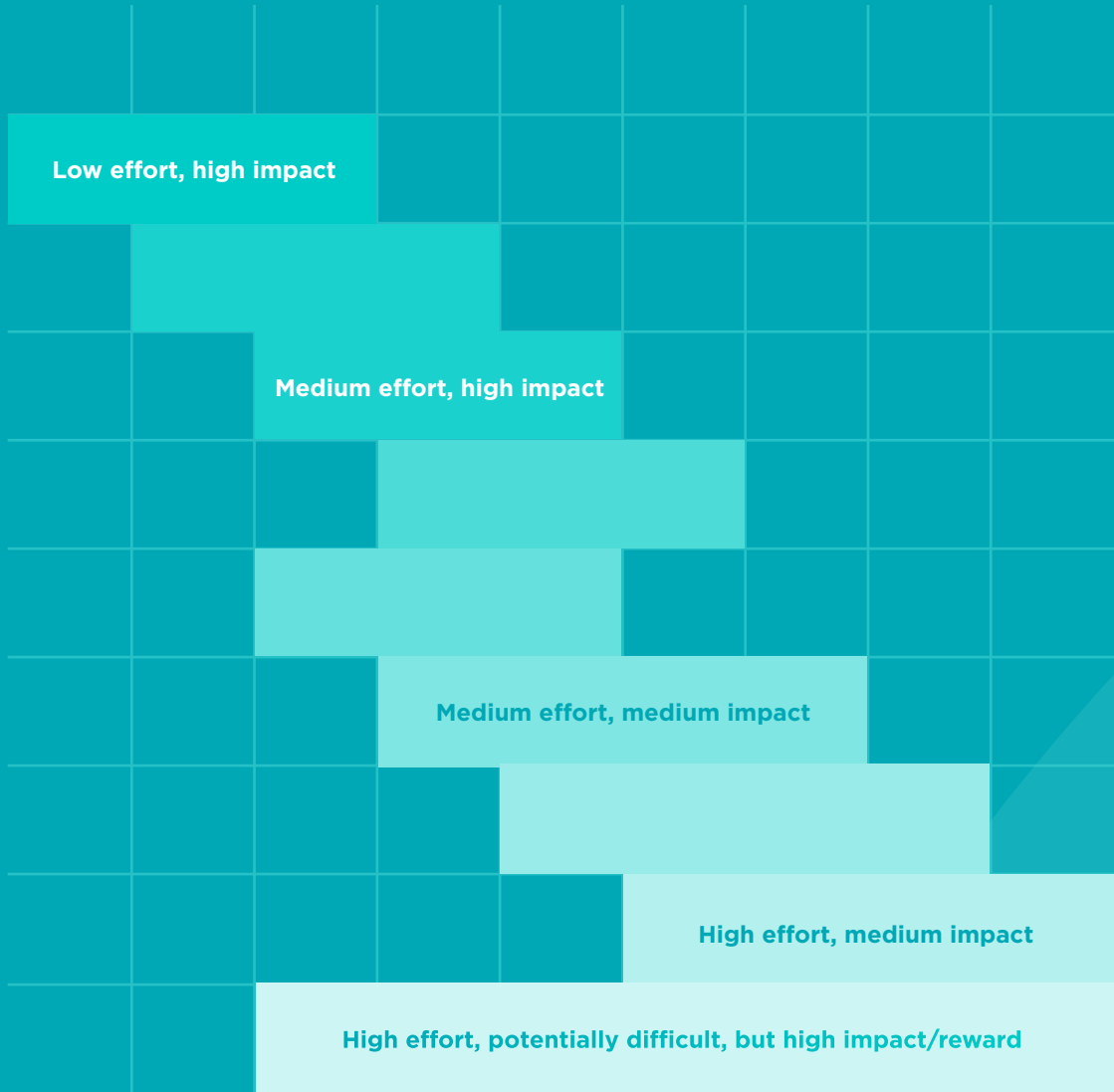
Assess

the level of effort vs. impact of each prospective strategy.

Set Roadmapping Expectations



Creating a Roadmap and Timing



Define roles and responsibilities

It is important to have clearly defined roles and responsibilities set with the team before executing your action plan. All involved parties should be aligned on roadmap assignments as well as deadlines.

Tasks should be delegated to team members based on subject matter expertise. Misalignment of project responsibilities can lead to confusion, misinformation, and ultimately project delays.

Team communication is key especially when agency partners are involved. Keeping all parties informed of updates and changes will help your project run smoothly and efficiently.

We recommend using the RACI method. For these cross-functional teams and initiatives, the RACI method provides a simple framework for delegating roles and responsibilities.



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RACI

R

Responsible

Does the work to complete the task.

A

Accountable

Delegates work and is the last one to review the task or deliverable before it's deemed complete.

C

Consulted

Key stakeholder who should be included in key decisions or activities.

I

Informed

Person(s) kept in the loop as things progress.

STEP 05

Measure and Monitor Progress

The importance of measurement

You must define success and set tangible, measurable goals. If you can't measure it, you won't know how impactful the effort was nor how to improve.

This is an ongoing process of defining targets, measurements, and establishing the necessary reporting and monitoring to ensure success. Your measurable objectives should be reviewed and monitored in timely, planned increments, in reports agreed upon by management.

Considerations for an effective measurement culture include:

- Reporting tools and platforms to use
- Appropriate resource allocation
- Periodical check-ins
- Qualitative feedback from recipients of the reporting/measurements



If your personalization efforts can improve email open rates by 10%, that can drive 2% more site visits and deliver .5% more conversions.

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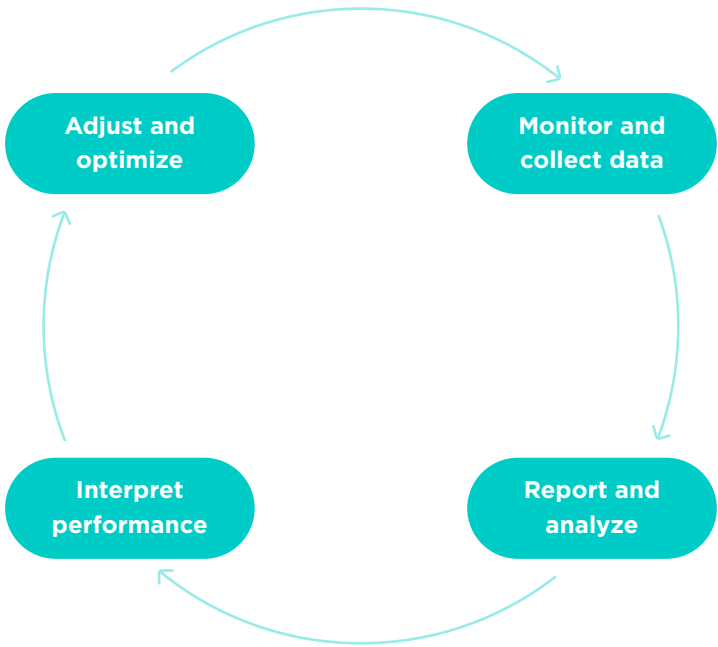
Measurement takes careful planning

CDPs affect many, if not all, of your customer experience channels and touchpoints. Measuring all of these takes careful planning and diligence. Take, for example, the steps it takes to measure the effects of email personalization using CDP insights.

If your personalization efforts can improve email open rates by 10%, that can drive 2% more site visits and deliver .5% more conversions. When you calculate the average price point per conversion and the margin per sale you can understand the impact of the CDP in a given channel. Once you do that across all your channels, you can see the cumulative revenue-generating impact of CDP technology.

Monitoring progress and optimizing

Monitoring and reporting must be a continual process in order to have long-term success and achieve optimal performance. Along with the correct resource allocation and periodic check-ins, adjusting your roadmap and timing will be essential in meeting stakeholder expectations and maintaining their continued support.



Data requirements

Business requirements for Key Performance Indicators (KPIs) must be defined by stakeholders and management prior to starting a reporting initiative. Identify the source for each measurement to clearly report KPIs and determine the data extraction process that will be required. Prior to utilizing the data for reporting, the data quality must be inspected by your subject matter experts to confirm data accuracy.

Below are recommended questions that should be answered during the data requirement discussion:

- What KPIs do you want to measure? Is each KPI clearly defined and are the data elements easily available to calculate the KPI?
- What are the primary data sources for analysis? Does the data need to be aggregated or blended from various sources?
- Do you have access to all of the data required to report on these KPIs? If not, is there a plan in place?
- Is the data in the correct format for reporting, or will data transformations be required?
- Are there data quality checks in place to confirm the accuracy of data used to calculate KPIs?

Common metrics to measure CDP success

01

ROI (Return on investment)

Are your CDP-triggered campaigns delivering more revenue than before? Are you saving money by cutting down on IT requests for integration help? Measuring the monetary impact of revenue growth, retention, and efficiencies helps generate the return on investment.

02

TCO (Total cost of ownership)

You know how much the startup costs are for licensing and implementation, but ongoing costs like customizations and operational costs like training and support need to also be calculated to understand the true cost of ownership.

03

BCR (Benefit — cost ratio)

Does your ROI outweigh the costs?

04

IRR (Internal rate of return)

IRR helps companies figure out when the project will break even. The right use cases to start can shorten the time to break even. With IRR you calculate the actual return provided by the project’s cash flows, then compare that rate of return with your company’s hurdle rate (how much it mandates that investments return).

05

TTV (Time to value)

The speed with which value is realized from a new technology. Long set-up and onboarding times reduce TTV, making the window to break even and become profitable with a new technology smaller.

06

NPV (Net present value)

Another way to figure out the break even point of your CDP project. NPV is calculated as the difference between the present value of cash inflows and the present value of cash outflows over a period of time.

Reporting tools and platforms

In many cases, successful KPI reporting will include the use of extract-transform-load (ETL) processes to combine data sources. Relational databases for efficient query performance and interactive dashboard reporting are important for a successful KPI monitoring program.

Below are a few questions to answer prior to selecting reporting tools:

- What reporting tools are already being used within your organization? Are all departments accessing their reports through a single platform, or will your KPIs need to be displayed across multiple vendors?
- Do your reporting tasks require data blending prior to dashboard creation?
- Do you already have a data warehouse set-up to store current and historical metrics?

ROI tip #1

Make sure you have baseline measurements in place for your Key Performance Indicators to show a before and after view of your CDP's effect. If you don't have baseline measurements, you can use an A/B approach to show the performance differential.



Schedule of measurement

Depending on the KPIs that you are measuring, the schedule of measurement will vary for each experiment or campaign. It is important to have a clearly defined timeline for reporting. For example, if a seasonal campaign is running on your site, the measurements might be collected from October through December. **It is important to check-in on the measurements collected to verify that all data elements are captured accurately and on-time; weekly checks of the results may be useful throughout the experiment or campaign.**

If the reporting is a long-term initiative, for example tracking cart abandonment per month, it might be necessary to collect the data each day and store the monthly aggregate totals in a data warehouse for trended analytics.

In general, it is valuable to know early in the process if the reporting database needs to support real-time, daily, weekly, monthly, or yearly summary metrics. Also, if there is a start and stop date based on the time of year (seasonality) it is helpful to have these details confirmed prior to starting the reporting project.

Qualitative assessment

Meeting with business users to review the progress of the KPI monitoring is important to confirm that the data collection is providing value.

There may be adjustments in the reporting that could be identified if initial sample data is presented in a draft dashboard and reviewed prior to the final dashboard being released to the team.

These iterations will help prevent surprises in the final reporting and help to start discussions across departments about how the reporting will be used to guide business decisions.



It is valuable to know early in the process if the reporting database needs to support real-time, daily, weekly, monthly, or yearly summary metrics.



Putting it all together

When the final reports are published and the KPIs are available, your cross-functional teams must be able to take action on the data. Your team should be able to identify if the objectives of the reporting have been met with the dashboards available; they should also be prepared to make adjustments to future experiments/campaigns based on the results. Reviewing the results with your executives and marketing teams can help guide internal action items and next steps for reporting.

Below are a few questions to answer at this stage in the process:

- Do the qualitative and quantitative outcomes support each other?
- Are the objectives being met with the resulting KPIs?
- Are you maturing according to the marketing and data models?



CHECKLIST

Are you ready to track your CDP’s ROI?

01

The groundwork

- ✓ You have historical data around the performance of your activation channels to compare with post-CDP implementation performance
- ✓ You have dialed-in your attribution models
- ✓ You have done the research before buying and have expected ROI targets

03

Advanced ROI steps

- ✓ You’re tracking the impact of the single view of the customer on your data governance efforts and ability to respond to consumer data privacy requests
- ✓ You’re developing next-step use cases to build on the success of your early use cases
- ✓ You’re extending the use of your CDP insights into other departments, like the customer service call center, and can attribute increases in metrics, like customer satisfaction

02

The next steps

- ✓ You’ve developed focused use cases with clear objectives
- ✓ You’re maximizing your CDP by integrating all of your customer datasets
- ✓ You have identified gaps in the customer experience that need to be addressed and measured
- ✓ You’re measuring the amount of IT and Data hours and requests associated with handling, preparing, and integrating data sources with the CDP to compare to previous technology workflows

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Your team should be able to identify if the **objectives of the reporting have been met with the dashboards available...**



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— spanning web, mobile, offline, and IoT devices— so brands can connect with their customers. Tealium's turnkey integration ecosystem supports over 1,200 client-side and server-side vendors and technologies, empowering brands to create a unified, real-time customer data infrastructure. The Tealium Customer Data Hub encompasses tag management, an API hub, a customer data platform with machine learning, and data management solutions that make customer data more valuable, actionable, and secure. More than 1,000 businesses worldwide trust Tealium to power their customer data strategies.

For more information, visit www.tealium.com.

Omnicom Precision Marketing Group (OPMG) aligns Omnicom's global digital, data, and CRM capabilities to deliver precisely targeted and meaningful customer experiences at scale. Using its universal framework of connected data, connected intelligence, and connected experiences, OPMG provides services that include data-driven product/service design, technology strategy and implementation, CRM / loyalty strategy and activation, econometric and attribution modeling, technical and business consulting and digital experience design and development. At the core of delivering these services is Omni, an advanced technology platform that combines a powerful cultural insights engine with massively scaled data insights from the first-, second- and third-party sources, including several proprietary Omnicom data partnerships.

OPMG

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