The CDP success formula: 5 steps every marketer should follow
Agenda

1. Strategic direction
2. Data foundation
3. Technical limitations
4. Organizational back-up
5. Collection of 1st party data
1. Strategic direction
Focus on your goals

**Strategy**
- Improving the customer experience
- Greater insight of customer data
- Creating 360° customer profiles

**Revenue**
- Increase conversions
- Increase avg. Order value
- Increase profitability

**Loyalty**
- Increase retention
- Increase the engagement
- Create relevant conversations
Outcome:
A strategic direction

Mapping goals and steps to get there

a) **Integrated & Automated CRM**: Sales know exactly which leads to talk to today

b) **Omni-channel personalisation**: Fully scalable personalized 1-1 communications

c) **Attribution**: Marketing initiatives directly correlated to revenue

d) **360 customer view**: Understanding user journeys and acting on them
**Use case:** Use and connect pre-conversion behaviour to profile users before conversion to subscriber in CDP

**Audience name:** Example audience

**Trigger:**
Website visit, account creation, newsletter conversion

**Channels:**
Website, email, some advertising

**Suppression & fallout:**
No interest
Unsubscribe

**Data:**
- **Source 1:** Website Analytics
  - Device ID
  - Cookie ID
  - Event level behaviour
- **Source 2:** PII storage
  - Email
  - Name
- **Source 3:** Omni-channel execution platform
  - Email
  - Segment

**Flow (Actions):**
1. Website visited twice – add unknown visitor to an advertising audience using DeviceID.
2. Advertisement click confirm interest – push profile creation on landing page.
3. Website Login – showcase newsletter permission USP.
4. Upon permission, send personalized newsletters.

**Priority:**
High / **Medium** / Low

**KPIs:**
- Amount of unified profiles
- Account creations
- Marketing Permissions

**Effort:**
High / Medium / **Low** / Undefined

**Stakeholders:**

**Lifecycle stage addressed:**

**Engage lead**

**Create awareness**

**Expand relationship**

**Convert**

**Consumer lifecycle**
Prioritizing use cases

Desirability (customer value)

Feasibility (complexity: tech, legal, org, etc.)

Viability (business value)

Customer Experience

Value

Must

Could

Should

Don’t do

Effort

Feasibility

Viability

Desirability

Customer Experience

Prioritizing use cases

Example of use
2. Data foundation
CDP data loop visualized

**COLLECT**
- Service
- Website analytics
- POS
- App behaviour
- CRM
- Customer service
- ERP
- MA

**MATCH AND JOIN**
- Channel data
- System data
- Unified 360° Profiles

**UTILIZE**
- Real-time activation
  - App push
  - SMS
- Update systems
  - Business intelligence
  - Reporting
  - Customer service
  - Customer service
  - Email

**CDP data loop**
- Collect data from various sources.
- Match and join data to create a unified 360° profile.
- Utilize real-time activation to push updates to relevant channels.
Clean and stringent

Amount of data and data sources

Common ground / data model / high data discipline
3. Technical limitations
Sharing capabilities of prioritized sources?

PRIO 1
- Cookie ID
- Customer ID
- Email
- Device ID
- Twitter handle
- Firstname
- Lastname
- Customer type

Source 1

Source 2

Source 3

Source 4

Source 5

PRIO 2

PRIO 3
4. Organisational back-up
How does this impact organisation?

Key roles

- Product owner
- Proxy product owner
- Domain experts

Work as one team

- Dataware house: Backend
- CDP: Unification + Segmentation
- MA: Content + frontend + Omni-channel execution
- CMS: Frontend
- PIM: Content
- Einstein: Frontend
- BI Tableau

• Product owner
• Proxy product owner
• Domain experts
Activity plan

<table>
<thead>
<tr>
<th>Period</th>
<th>CDP Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKT / Nov 2023</td>
<td>CDP Education, Activate 5 Basic Audiences, Ingestion of Tracking Part 2*</td>
</tr>
<tr>
<td>Dec / Jan 2023-2024</td>
<td>Build Audience/Attributes on New Data, Activate 10 Audiences Across Channels</td>
</tr>
<tr>
<td>Feb / Mar 2024</td>
<td>Utilize AI Models, Utilize Audience in Larger Campaign</td>
</tr>
<tr>
<td>Apr / May 2024</td>
<td>Utilize Attributes as Personalized Content, Ingestion of Tracking Related to Login</td>
</tr>
</tbody>
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- Activities
- Milestones
5. Collection of 1st party data
The shoes you favoured in our survey is now for sale.

I've heard you are now part of a running club. Do you need new running shoes?

The shoes you have been looking at is now for sale.

Maybe you wouldn't have cancelled your run today if you have had new shoes?
"The authors find that, except for monetary incentives and lottery participation, the identified drivers significantly influence consumers' decision to grant permission.
Ensure a connection to the desired use cases

Keep the target group in mind

Be aware of limitations

Think the process through
Key takeaways

- Have clearly defined goals with the CDP
- Make sure you have a solid data foundation
- Be aware of the possible technical limitations
- Involve the right people in your organisation
- Have a strategy of continuously collecting more 1st party data
- Preparation is key - think all scenarios to the end
Thank you for your time

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