# The CDP succes 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

Model by
DAYLEE.

raptor. ✕ knowit EXPERIENCE

# Outcome:
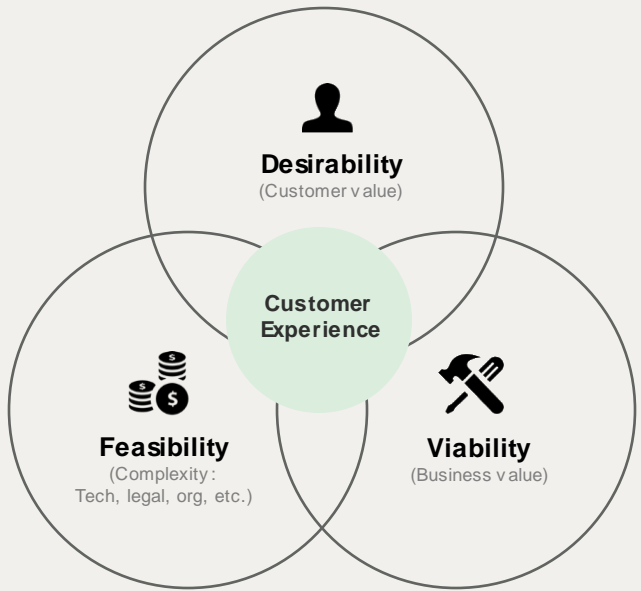# A strategic direction

## 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



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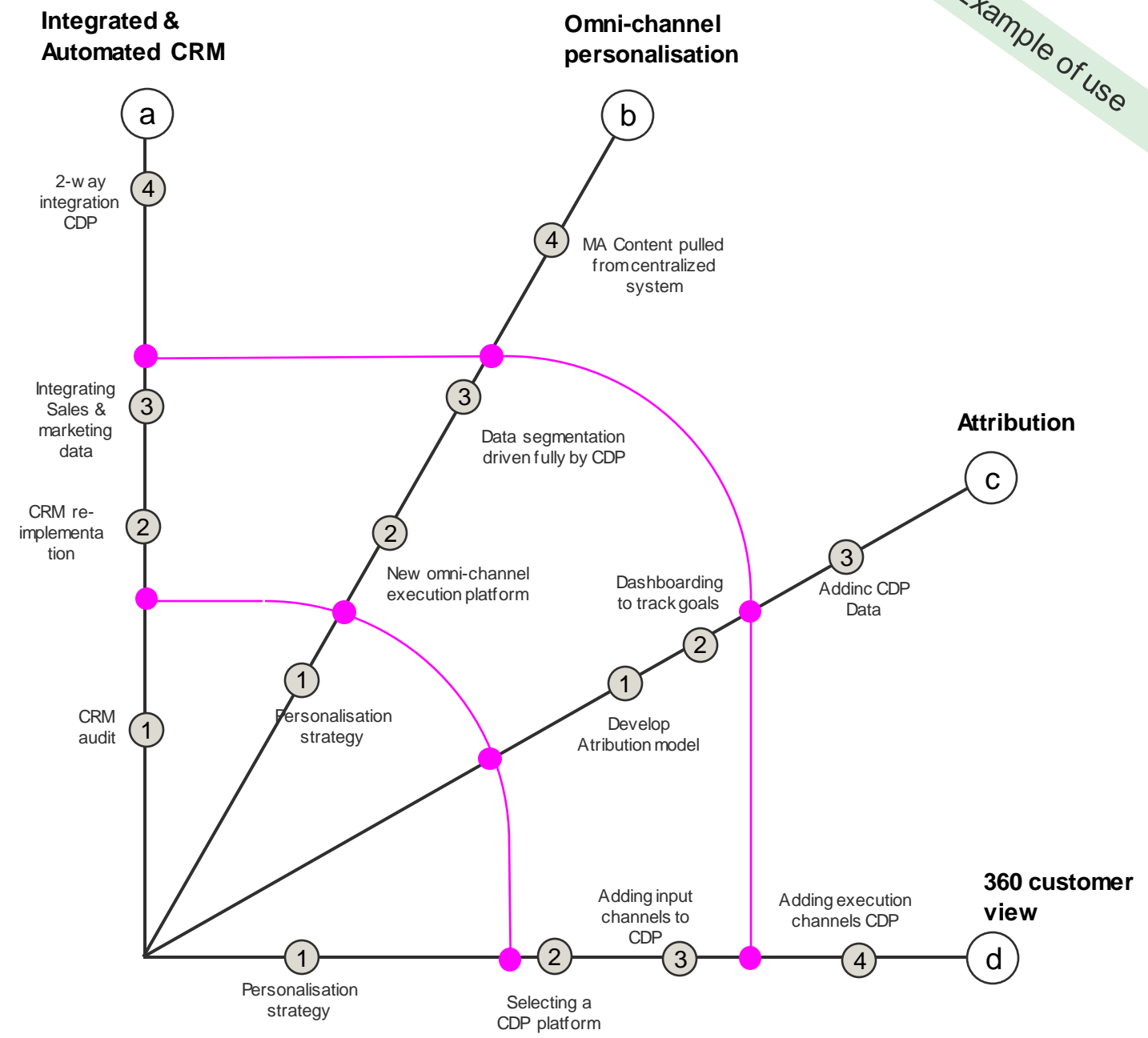
# Use case: Use and connect pre-conversion behaviour to profile users before conversion to subscriber in CDP
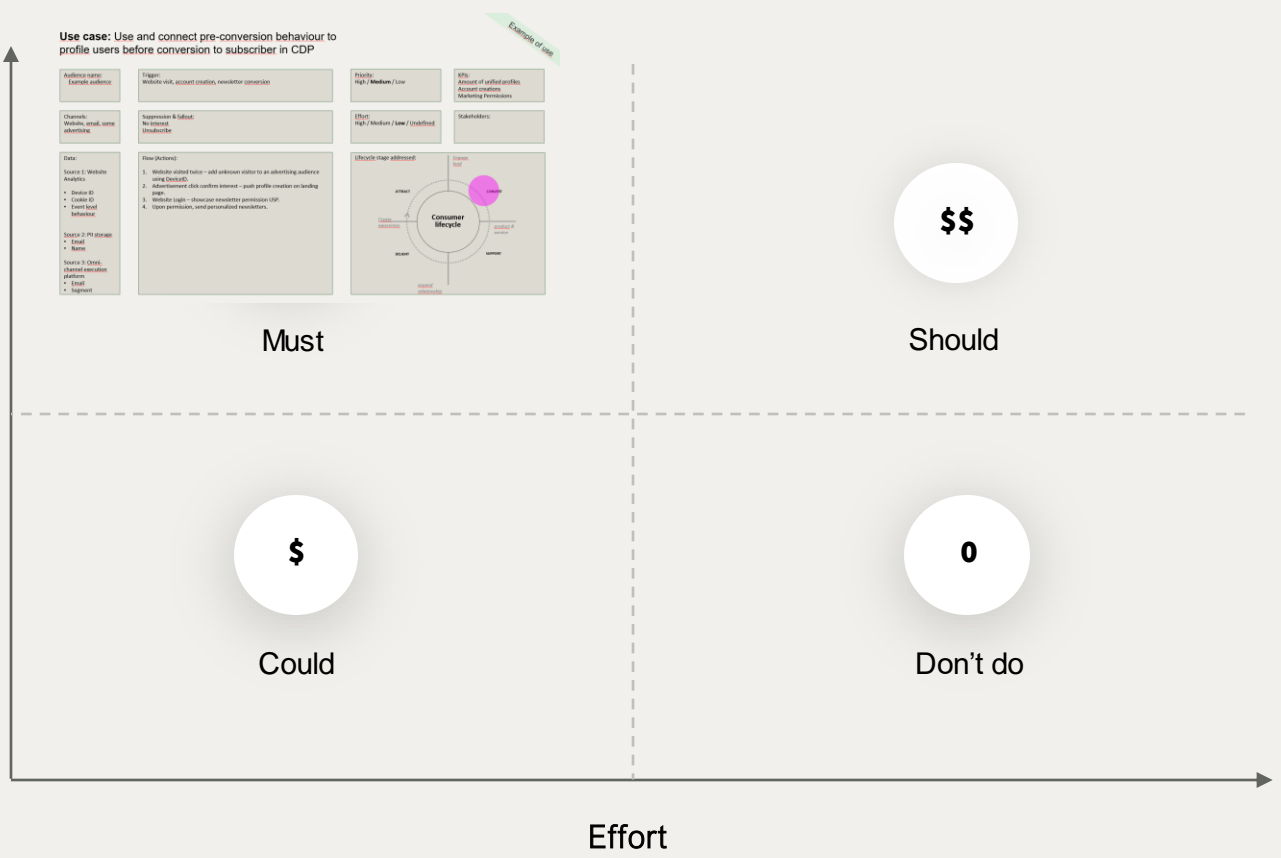
**Audience name:**
Example audience

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

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

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

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

**Suppression & fallout:**
No interest
Unsubscribe

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

**Stakeholders:**

**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.

**Lifecycle stage addressed:**



Engage lead

ATTRACT

CONVERT

Create awareness

Consumer lifecycle

product & service

DELIGHT

SUPPORT

expand relationship

# Prioritizing use cases

# 2. Data foundation

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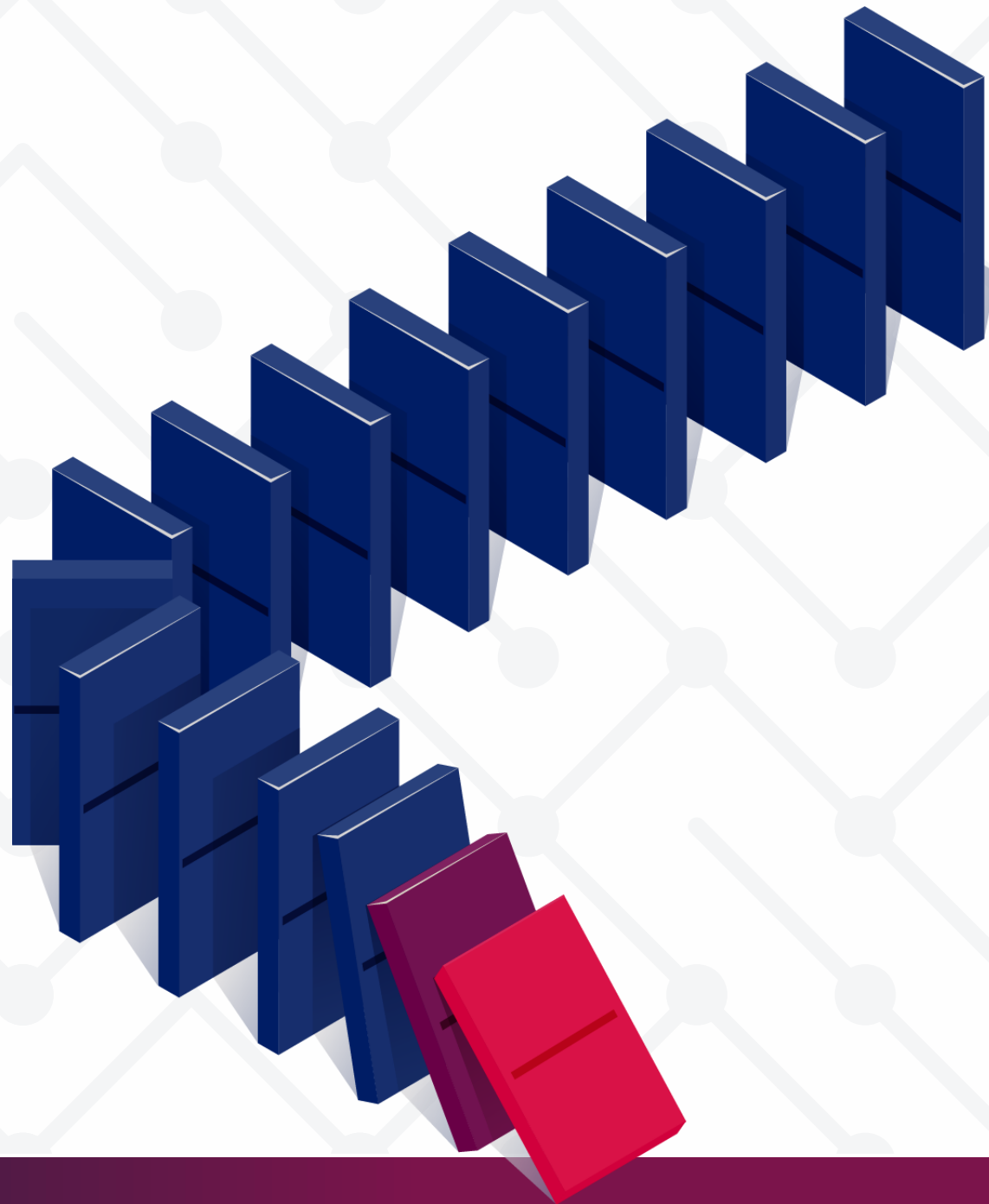
# **CDP** data loop visualized

COLLECT

MATCH AND JOIN

UTILIZE

Service

Website analytics

POS

App behaviour

**Channel data**

**System data**

CRM

ERP

Customer service

MA

**Unified 360◦ Profiles**

**Real-time activation**

App push

SMS

Email

**Update systems**

Business Intelligence

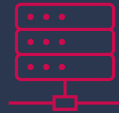Reporting

Customer servicer
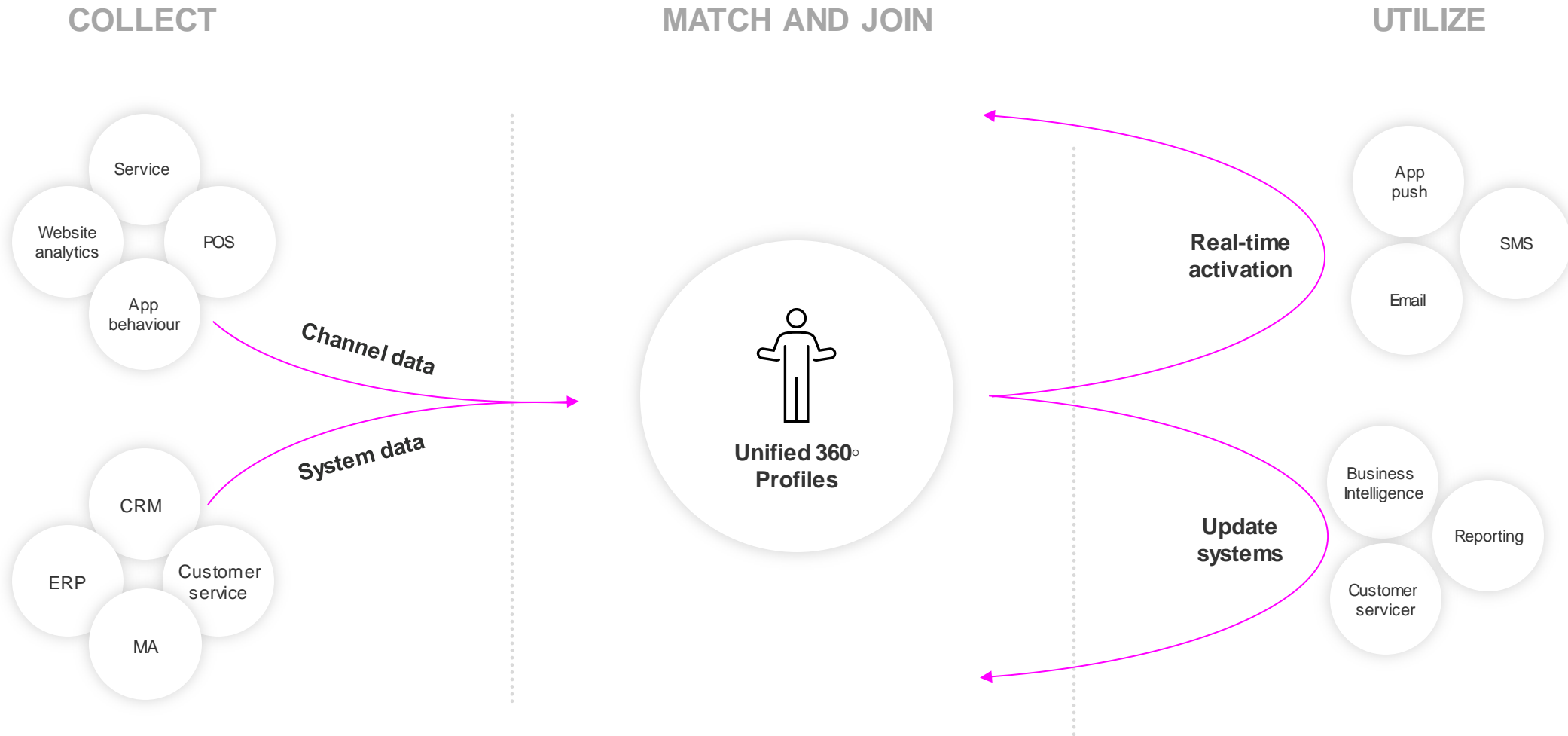
**Clean and stringent**

**Amount of data and data sources**
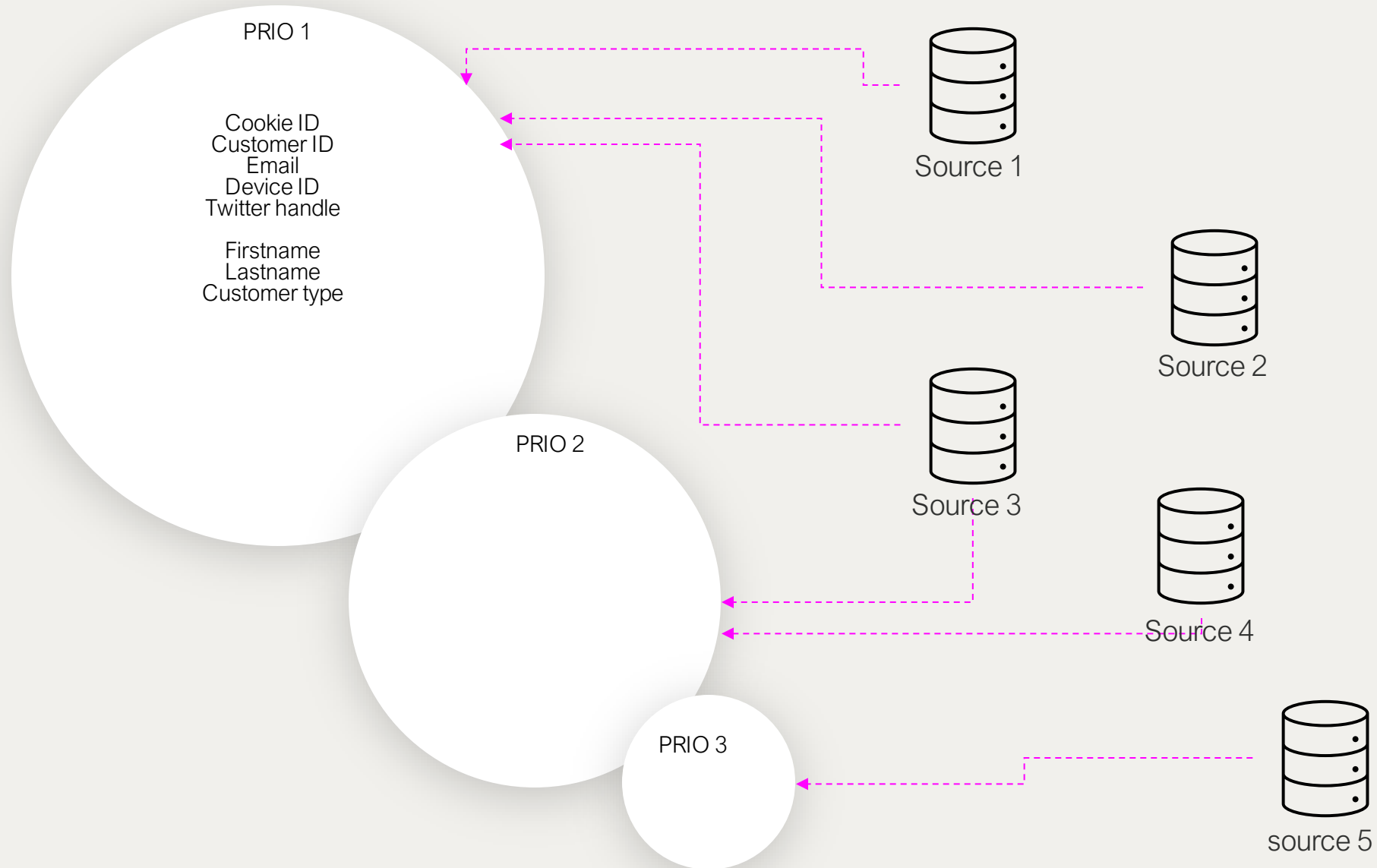
**Common ground / data model / high data discipline**

# 3. Technical limitations

# Sharing capabilites of prioritized sources?

PRIO 1

Cookie ID
Customer ID
Email
Device ID
Twitter handle

Firstname
Lastname
Customer type

PRIO 2

PRIO 3

Source 1

Source 2

Source 3

Source 4

source 5

# 4. Organisational back-up

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# How does this impact organisation?

**Work as one team**

**Key roles**

- Product owner
- Proxy product owner
- Domain experts
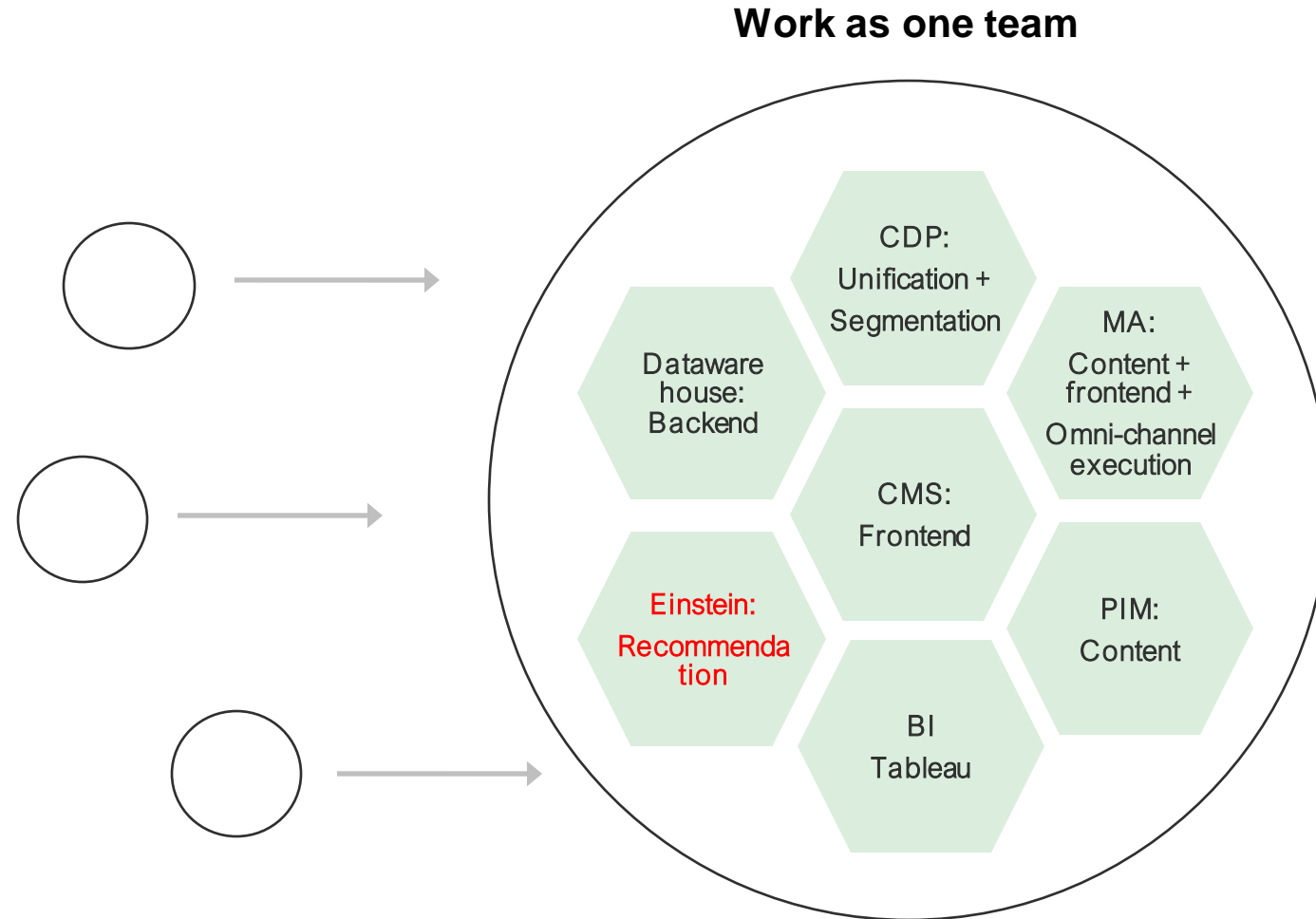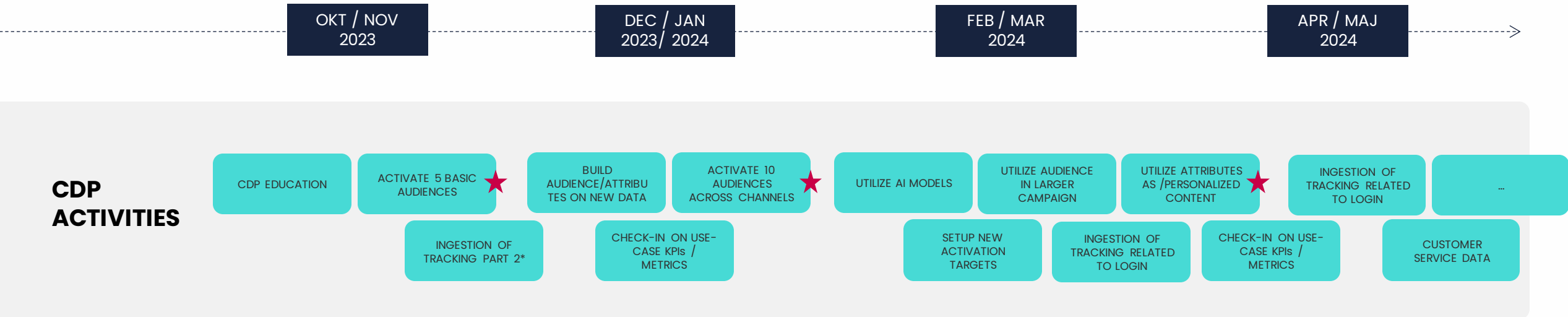


CDP:
Unification +
Segmentation

MA:
Content +
frontend +
Omni-channel
execution

Dataware
house:
Backend

CMS:
Frontend

Einstein:
Recommenda
tion

PIM:
Content

BI
Tableau

# Activity plan



**OKT / NOV 2023**

**DEC / JAN 2023 / 2024**

**FEB / MAR 2024**

**APR / MAJ 2024**

## CDP ACTIVITIES

- CDP EDUCATION
- ACTIVATE 5 BASIC AUDIENCES ★
- INGESTION OF TRACKING PART 2*
- BUILD AUDIENCE/ATTRIBUTES ON NEW DATA
- CHECK-IN ON USE-CASE KPIs / METRICS
- ACTIVATE 10 AUDIENCES ACROSS CHANNELS ★
- UTILIZE AI MODELS
- SETUP NEW ACTIVATION TARGETS
- UTILIZE AUDIENCE IN LARGER CAMPAIGN
- INGESTION OF TRACKING RELATED TO LOGIN
- UTILIZE ATTRIBUTES AS /PERSONALIZED CONTENT ★
- CHECK-IN ON USE-CASE KPIs / METRICS
- INGESTION OF TRACKING RELATED TO LOGIN
- CUSTOMER SERVICE DATA
- ...

■ Activities

★ Milestones

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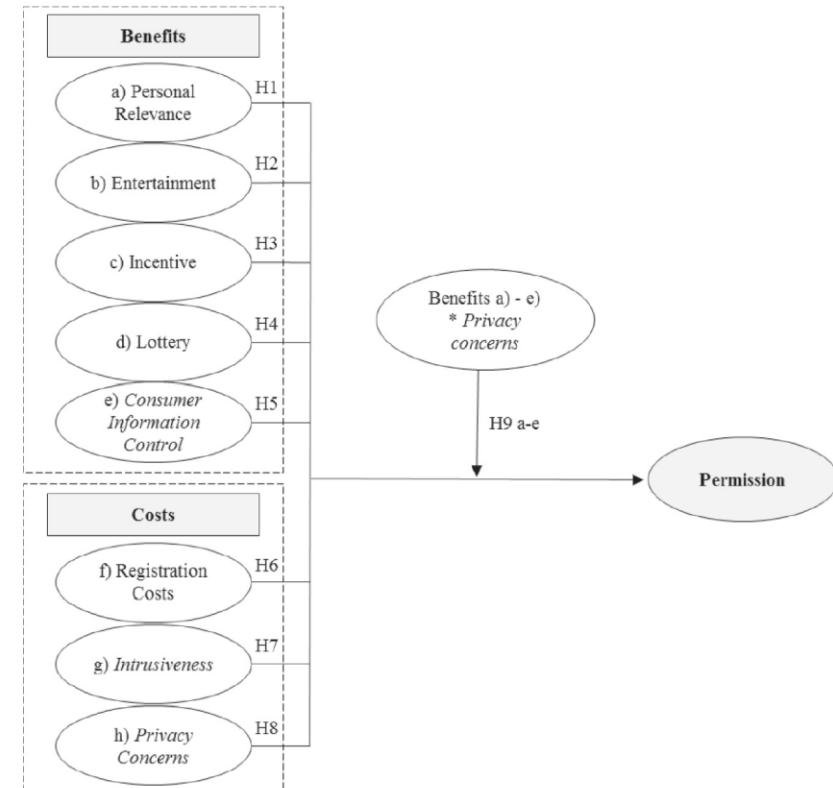# 5. Collection of 1st party data

# Data collection strategy

Manfred Krafft, Christine M. Arden & Peter C. Verhoef:

## Permission Marketing and Privacy Concerns - Why Do Customers (Not) Grant Permissions?

———

"The authors find that, except for monetary incentives and lottery participation, the identified drivers significantly influence consumers' decision to grant permission.



Fig. 1. Hypothesized relationships for the empirical study.

# Key take-aways

- 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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