

Expert Perspective: CDPs, AI, and Modern Data Stack



CUSTOMER
DATA PLATFORM
INSTITUTE





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Co-Founder & CEO



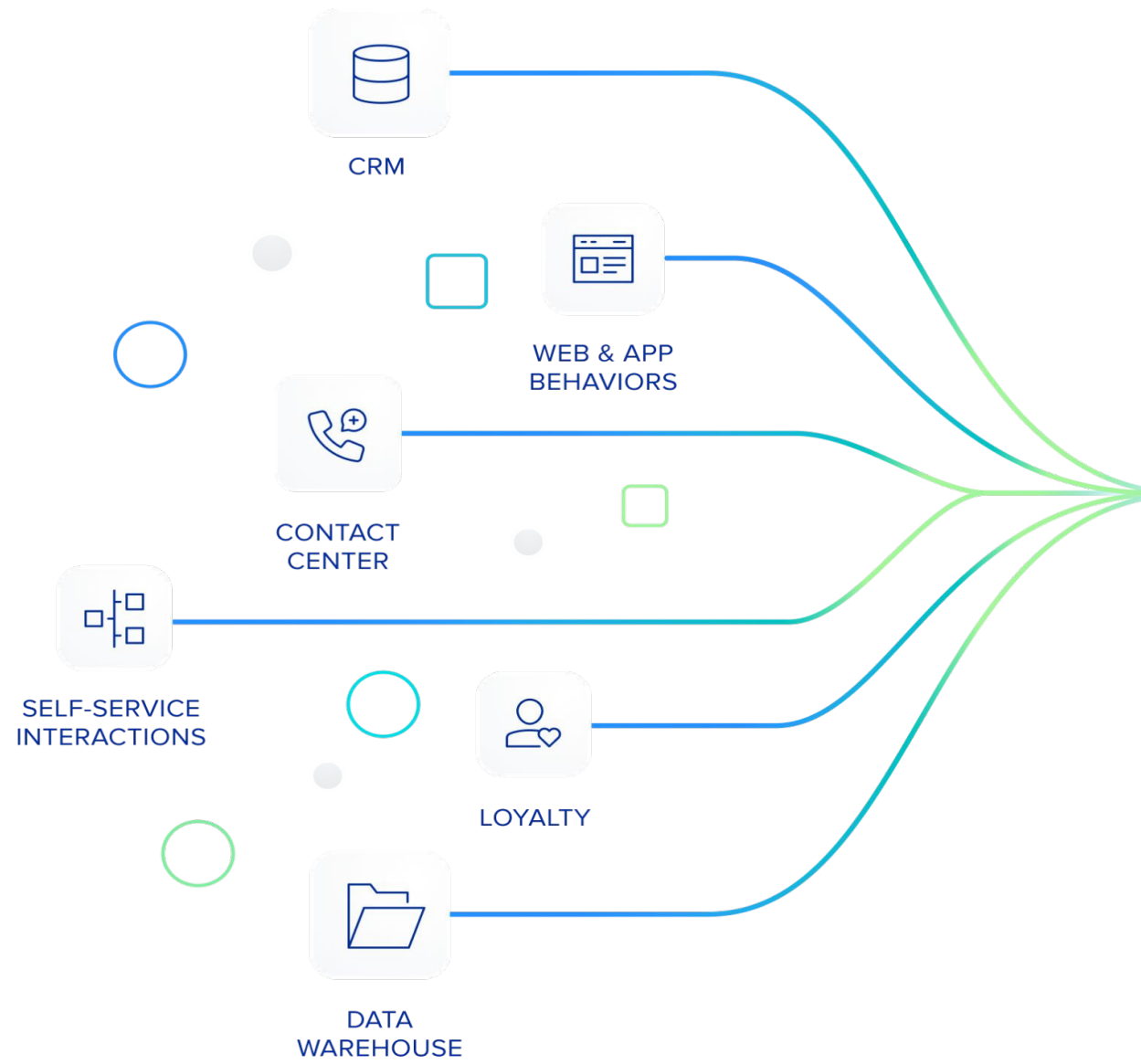
David Raab
Founder



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The Problem: A Unified View of Customers Needs to Be Accessible Everywhere

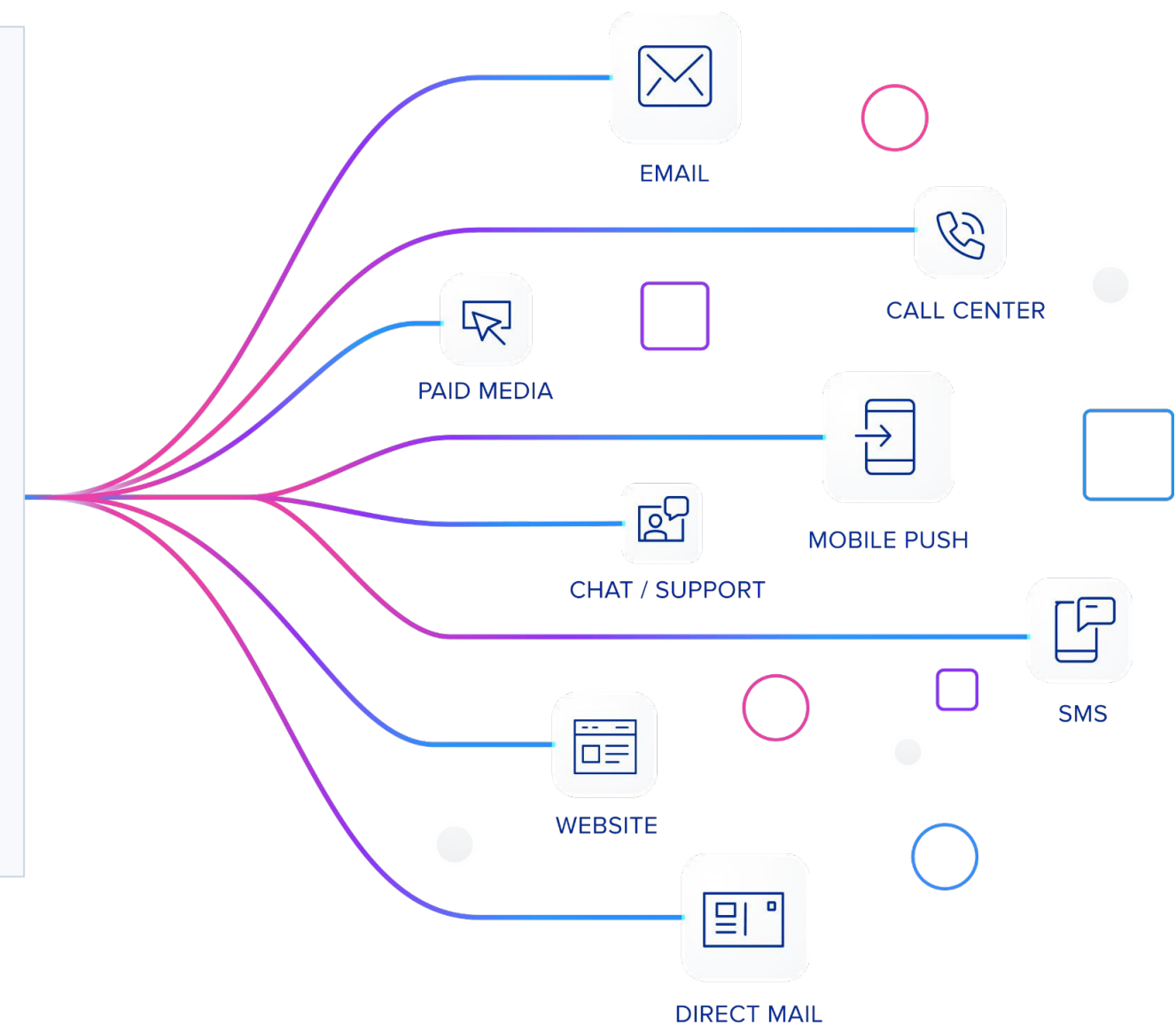
Customer Data Sources



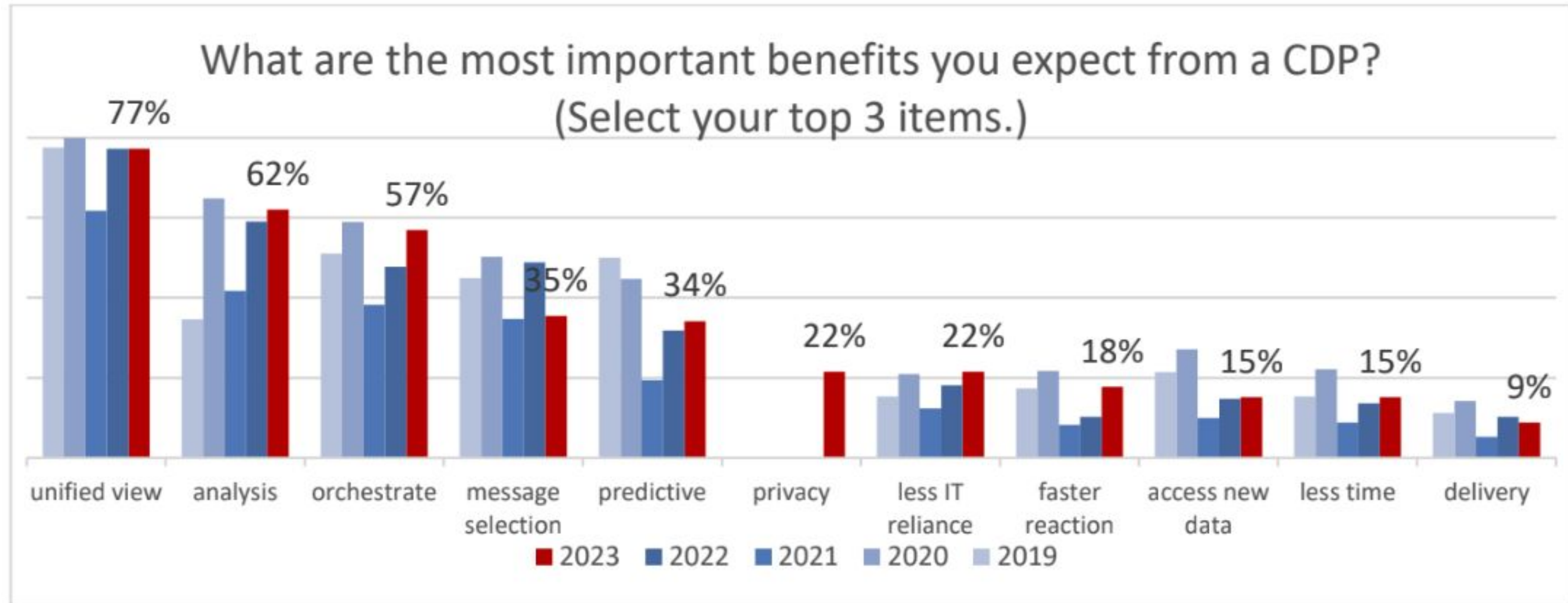
Enter CDPs

“Packaged software that creates a persistent, unified customer database that is accessible to other systems.”

Customer Engagement Channels

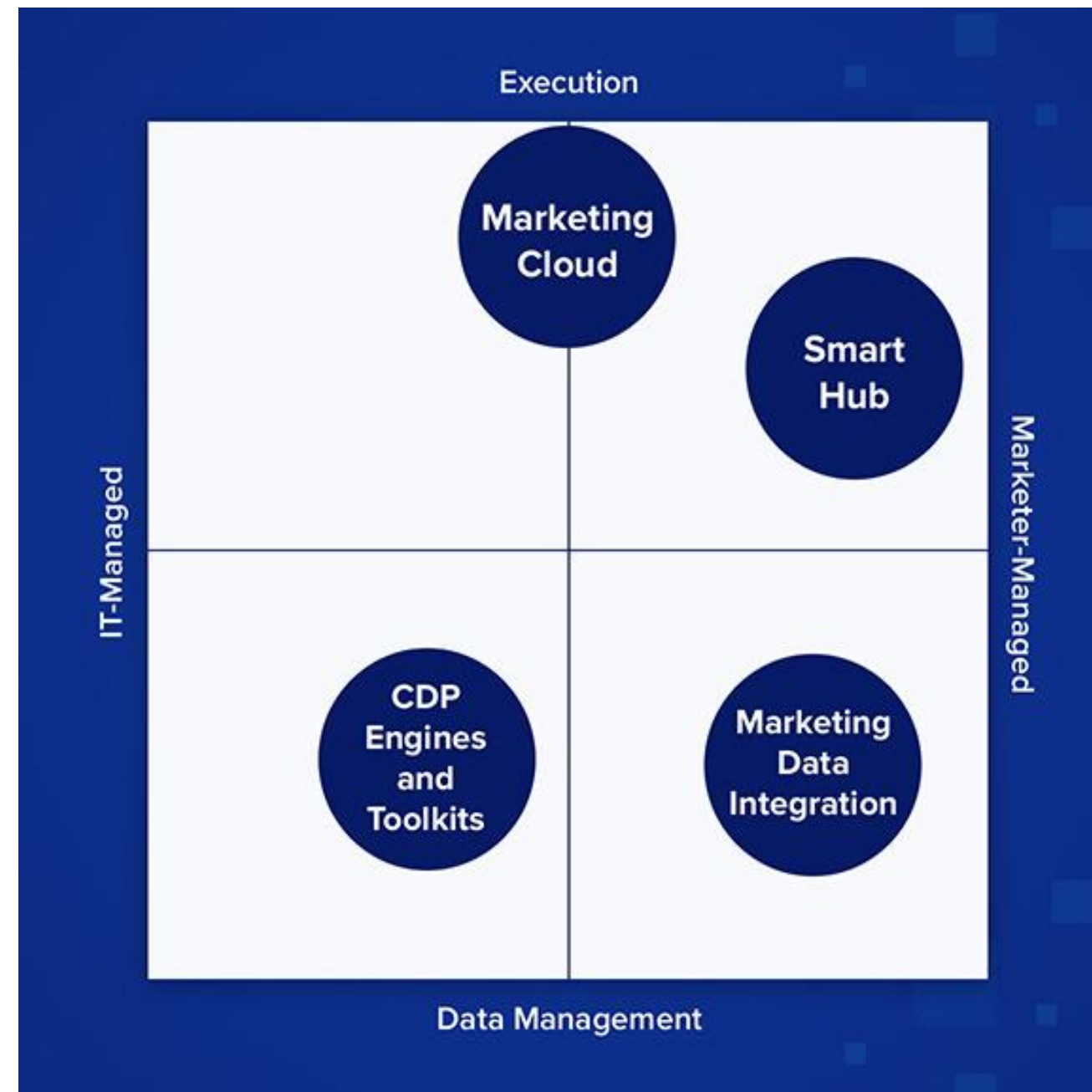


Key Benefits of a Unified View: Analytics, Orchestration & Message Selection



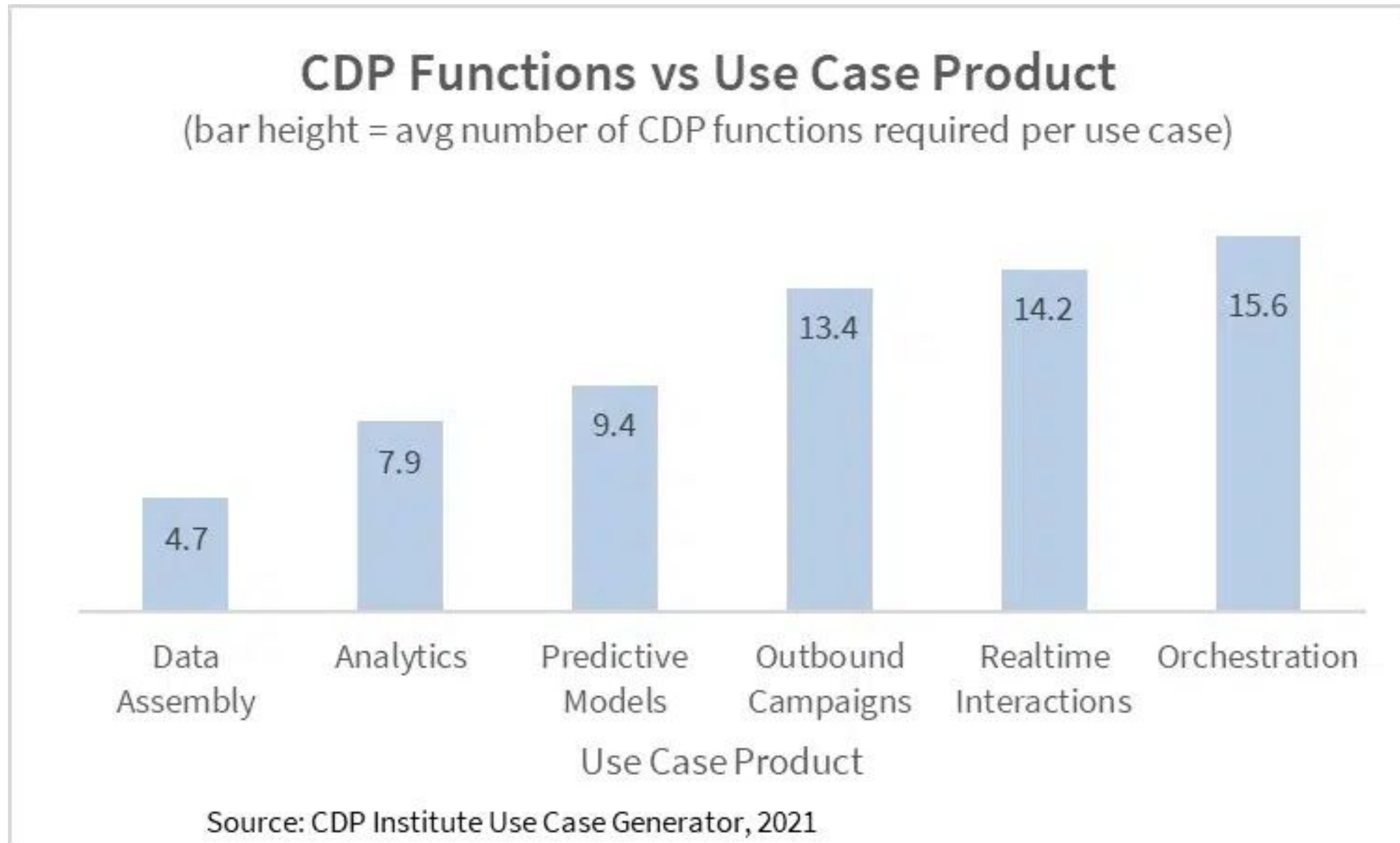
Trend 1: CDPs Going Beyond Data Management, to Intelligent Execution

Gartner



“CDPs optimize the timing and targeting of messages, offers and customer engagement activities, and enable the analysis of individual-level customer behavior over time.”

CDPs May Start in Data Assembly, But the Goal is To Power Real-Time Interactions & Orchestration



Trend 2: CDPs & the “Modern Data Stack” for Analytics

Cloud Data Warehouses Have Become Easy to Spin Up & Scale. This makes them an important data source for CDPs.

1. Cloud based serverless platform
2. Ability to load raw data without transformation and **transform** within the data warehouse (using dbt)



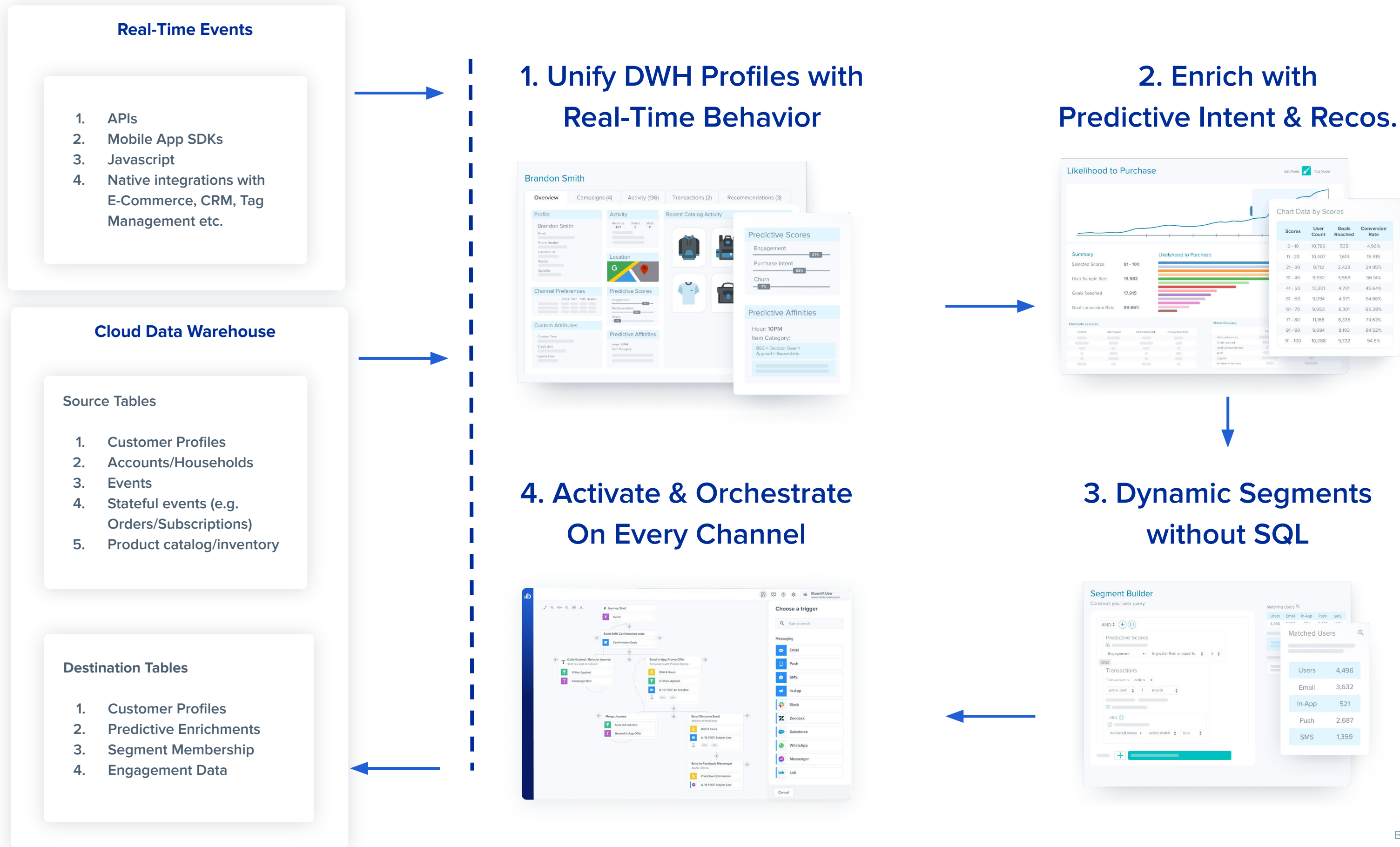
Challenge: Analytical Use Cases Can Be Entirely Batch Mode, But CDP Use Cases Cannot Be

- **The entire modern analytics stack that dbt participates in is built around batch-based processing.** Stitch, Fivetran, Snowflake, BigQuery, Looker, Mode, etc.—they’re all targeting a batch-based use case. This may evolve over time, but that’s the current state of the industry.
- **Most analytics use cases do not need real-time data.** Decisions based on analytics data can often be made on top of data that are up to a day old—for example, a marketing team may review ad performance weekly to decide which channels they will focus on in the upcoming week. Even [Spotify](#) has up to 24 hours delay in their data platform!

CDPs Need to Also Perform Real-Time Computation:

1. CDPs must serve “inbound” use cases in CX & DX, which have to be served in true real-time
2. CDPs must also support near-real-time triggered use cases
3. CDPs must be able to do computations for 1:1 personalization (e.g. dynamic content & orchestration) that are better suited for a compute platform, not a warehouse

Architecting a CDP That Combines DWH + Real-Time



Trend 3: CDPs as Enablers of AI

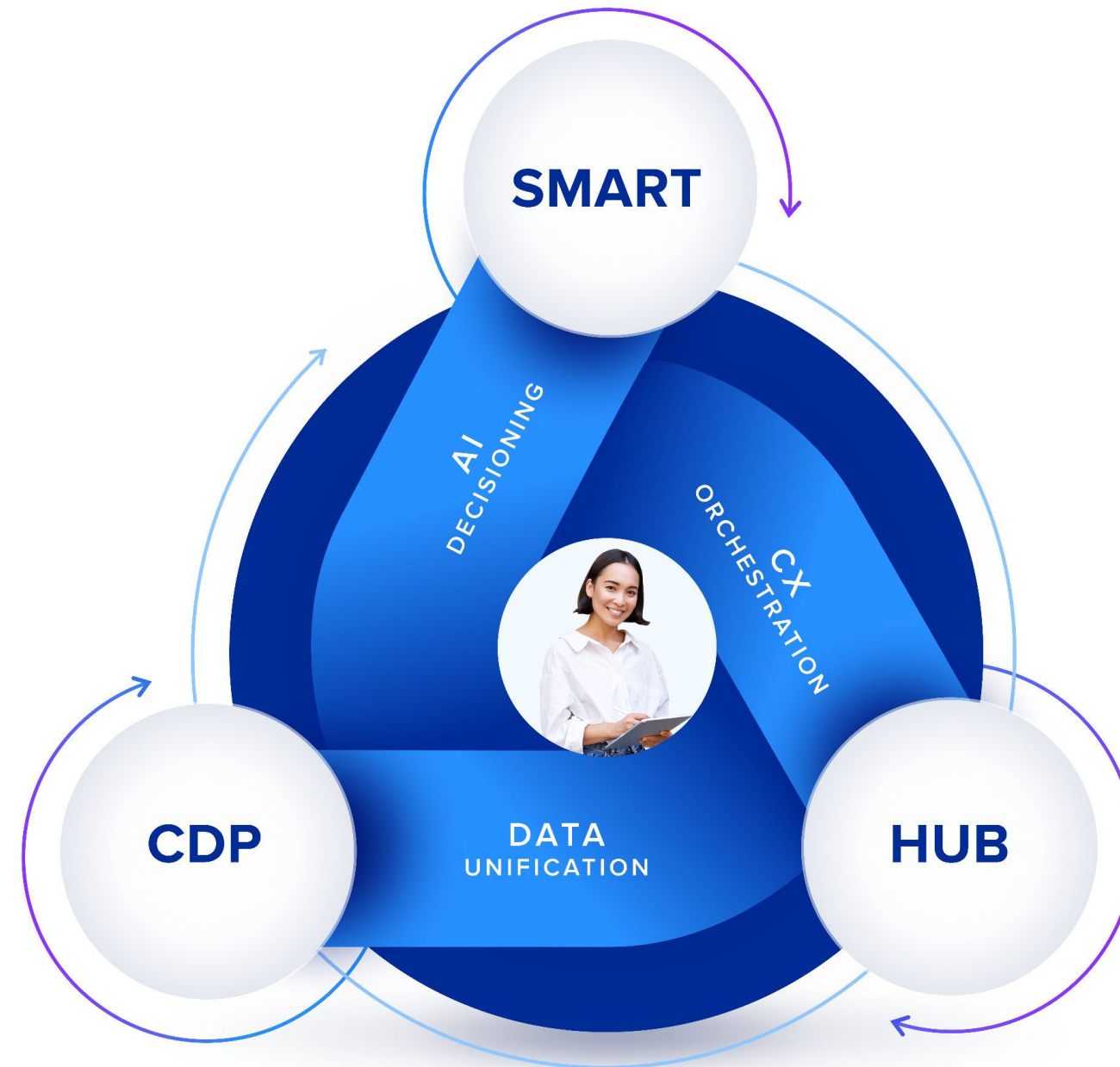
- ✓ **Speed of building “Customer AI” models:** Can the CDP automatically extract features, and build ensemble models from a large library of primitive models?
- ✓ **Productionizing the Model:** Can the CDP update & re-score customers dynamically with new data? Can it make the updated scores/outputs available to 3rd party systems?
- ✓ **Feedback loop & Experimentation:** Can the CDP tie the actions recommended by the model to downstream conversions, and enable dynamic optimization?
- ✓ **Customer AI + Gen AI:** Can the CDP tie “Customer AI” with “Generative AI”, to power novel inbound & outbound experiences?
- ✓ **Auditable AI:** Can the CDP keep an audit trail of AI based interactions with the customers, to ensure trust, and privacy compliance?

Q&A

Blueshift: Powering Customer-Centric Engagement On Every Channel

UNIFY CUSTOMER DATA

- Connect offline & online data
- Easy data modeling: households, transactions, catalog, derived events and more
- Actionable identity



PREDICT & RECOMMEND

- Transparent & customizable AI
- Content, product and offer recommendations
- Automated propensity scoring

ORCHESTRATE & ACTIVATE

- Triggered workflows and journeys
- Audience activation
- Customer insights

Thank you!

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