

CHOOSING THE RIGHT CDP

The Essential 10-Step Checklist

Choosing the ideal Customer Data Platform (CDP) for your needs can be a daunting task. This checklist serves as your comprehensive guide, breaking down 10 key considerations when choosing a CDP. From data unification and activation to dynamic segmentation and AI capabilities, follow these guidelines to discover the CDP that aligns seamlessly with your business goals.



1

Ensure the CDP can seamlessly ingest data from multiple sources and unify your data for a complete view of your customer.



Tech Stack Compatibility & API Integration: Compatible with existing CRMs and marketing tools and easy integration with other systems through powerful APIs.



Unified Customer Profiles: Connects, unifies, and resolves identity, attribute, and event data from multiple touch points, devices, and channels into a single customer view.

2

Confirm the platform's ability to efficiently activate your data for swift and personalized 1:1 customer engagement.



Campaign Orchestration: Delivers seamless engagement across various marketing channels, leveraging your customer data.



Custom Profile Attributes: Automatically collects and adds custom fields, attributes, and behavioral signals to customer profiles for activation.

3

Validate the flexibility of data models and confirm integrations across cloud data warehouses.



Customizable Data Models: Adjusts data models to suit specific business requirements and use cases.



Real-Time Data: Real-time data ingestion and processing, enabling immediate access to updated customer information.



Handling Volumes: Manages increasing volumes of data without compromising performance or functionality.



Seamless Integration with Cloud Data Warehouses: Bi-directional integrations with your Cloud DWH (e.g. Snowflake, Redshift, BigQuery, Databricks).

4 Confirm dynamic profile segmentation and advanced analytics capabilities for in-depth audience insights and precise targeting.

- ☐ **Targeted Segmentation:** Enables technical and non-technical teams to quickly and easily create audience segments.
- ☐ **Real-Time Adaptivity:** Builds precise audiences using real-time customer data including site activity, affinities, transaction history, and more.

5 Check if the CDP supports real-time personalization to enhance customer engagement and tailor customer journeys.

- ☐ **Dynamic Personalization:** Creates real-time personalized experiences based on live customer behavior.
- ☐ **Live User-Driven Customization:** Adapts content or recommendations based on a customers' immediate actions, ensuring dynamic and personalized experiences in real-time.

6 Confirm advanced AI capabilities to easily create and optimize hyper-personalized experiences throughout the customer lifecycle.

- ☐ **Predictive Analytics & Segmentation:** Incorporates AI insights for predictive analytics or behavior analysis, so marketers can identify a customers' likelihood to engage, purchase, churn, and more.
- ☐ **AI-Driven Tools:** Supports AI-driven tools such as custom recommendations, send time optimization, and more.

7 Ensure the availability of robust reporting for actionable customer insights and precise campaign analysis.

- ☐ **Cohort Analysis:** Provides insight into how different customer groups impact your key metrics, independent of campaigns with cohort analysis.
- ☐ **Campaign Metrics:** Monitors campaign performance to measure impact and optimize campaigns.
- ☐ **Custom Reporting:** Easily visualizes complex data with an intuitive interface that enables you to track the metrics and KPIs that matter most to your business.

8 Validate the security measures and compliance standards of the CDP to safeguard your data and ensure adherence to industry regulations.

- ☐ **Regulatory Adherence:** Compliance with data protection regulations that are important to your business (HIPAA, GDPR, SOC2, CCPA, etc.).
- ☐ **Stringent Data Security:** Built-in features for robust data security and privacy management.

9 Check out what others are saying about the CDP to gauge real-world experiences and satisfaction.

- ☐ **User References:** Seek references, case studies, and peer reviews for practical insights into usage and benefits.

10 Sign up for a free trial to assess whether the CDP aligns with the specific needs and goals of your business.

- ☐ **Trial Availability:** Access to free trial or demo version for thorough functionality and compatibility testing.

Conclusion

A CDP is a powerful tool for unlocking valuable insights into customer behavior and driving impactful engagement. It enables personalized campaigns, offers real-time insights, ensures consistency across channels, optimizes ROI, and fosters seamless collaboration and efficiencies. Choosing the right CDP is not just a decision, but an investment in the future of your business.

Ready to kickstart your CDP journey? Sign up for free to begin driving sophisticated, personalized customer engagement and automation in just 15 minutes. [Get Started Now.](#)

