



CERTIFICATION PREPARED FOR

BLUESHIFT

AUDIT COMPLETION AUGUST 14, 2020

CONFIDENTIAL



Audit Report

Confidential Report For: **BLUESHIFT**

Audit Complete Date: 8/14/2020



- ✓ Ingest Data
- ✓ Maintain Data
- ✓ Store Historical Data
- ✓ Unified Customer Profile
- ✓ Share Customer Data

Blueshift's SmartHub CDP meets all core RealCDP certification requirements and supports B2C companies with a cloud-based (AWS) SaaS platform that is smart, robust and easy-to-use (no code). SmartHub CDP is delivered and operates as an interdependent set of capabilities (rather than a suite of modules). The platform design and delivery approach enables Blueshift to provide marketers a tightly integrated user experience powered by AI/ML intelligence. Data integration and data management capabilities include automated data mapping and a NoSQL database for structured and unstructured data. Processing speeds and scalability are excellent, with real-time profile updates available. While the platform can store content for personalized message creation, it also links to external content management systems. Similarly, an entire email can be built within the SmartHub CDP and sent to an ESP for delivery or SmartHub can send just the data to the ESP, where the full email is built and delivered. This "build or link" approach makes Blueshift more flexible than many CDP platforms when integrating with existing marketing engagement stacks.



- ✓ Channels & Connectors
- ✓ 3rd Party Applications
- ✓ Real Time Updates
- ✓ Real Time Customer Profile
- ✓ Data Hygiene
- ✓ End User Training

Blueshift SmartHub CDP includes several key enhanced capabilities on top of core CDP capabilities. This CDP comes with excellent connectivity (hundreds of pre-built connectors) and cross-channel messaging capabilities. SmartHub links directly with many paid media platforms and delivers a superior online ad solution. Tight linkages to other 3rd party data solutions are in place for easy data enhancement processing. Real time processing capabilities are well established and include real time data profile updates and real time personalized customer messaging. Marketing users have a comprehensive customer profile at their fingertips that displays all available customer data for developing campaigns and messaging. Building customer segments is fast and intuitive with 10+ pre-built predictive models available for easy refinement of targeting. Data security and privacy are fully developed. Initial and advanced end-user training is provided with high-quality online documentation also available. As is common with many CDPs, SmartHub has limited native identity resolution capabilities, no probabilistic matching and only basic data hygiene capabilities built into the system.



- ✓ Analytics
- ✓ Personalization
- ✓ Journey Orchestration

Blueshift easily meets all CDP Stack certification requirements and delivers a powerful set of analytics, personalization and journey orchestration solutions that enable marketers to support best practices. The SmartHub CDP provides pre-built reports and dashboards that can be filtered and modified by users with drop-down menus. AI and Machine Learning provides predictive scores for each individual customer and scores also assist with customer lifecycle management and campaign targeting effectiveness. Personalization is robust, with the ability to customize messages at the individual customer level and respond to customer reactions with a follow-up message. Cross-selling is enhanced with a collaborative filtering tool, unique among CDPs. Journey orchestration is outstanding with an easy-to-use visual interface that enables multi-touch, multi-channel journeys.

OTHER

The Predictive Studio provides a "white box" approach to predictive scoring of customer records. The process is totally transparent and provides valuable insights into which data variables are providing the most predictive power in each model score. The reporting/dashboard functionality was built by Blueshift but the platform can share data with any 3rd party BI tool.

SUMMARY

SmartHub CDP is a comprehensive CDP built for marketers with out-of-the-box features designed to accelerate an organization's adoption of customer-centric marketing. This platform has a marketer-centric interface that is best-in-class and integrates well with any existing marketing technology stack. Although it fits the needs of mid-market companies with relatively short implementation requirements it will easily scale up to meet the needs of large enterprise companies.

Blueshift Findings

The CDP Institute audits 14 CDP related capabilities. Below are the high-level findings for CDP, Inc.

Requirements fall into three categories:

- ✓ Meets All Requirements
- ✓ Meets Some Requirements
- ✗ Meets No Requirements

CAPABILITY	TYPE	Findings
✓ Ingest Data	Core CDP	Meets requirements
✓ Maintain Data	Core CDP	Meets requirements
✓ Store Historical Data	Core CDP	Meets requirements
✓ Unified Customer Profile	Core CDP	Meets requirements
✓ Share Customer Data	Core CDP	Meets requirements
✓ Channels & Connectors	CDP Enhancement	Meets requirements
✓ 3rd Party Applications	CDP Enhancement	Meets requirements
✓ Real Time Updates	CDP Enhancement	Meets requirements
✓ Real Time Customer Profile	CDP Enhancement	Meets requirements
✓ Data Hygiene	CDP Enhancement	Postal data and advanced data hygiene requires a third service or software.
✓ End User Training	CDP Enhancement	Meets requirements
✓ Analytics	CDP Stack	Meets requirements
✓ Personalization	CDP Stack	Meets requirements
✓ Journey Orchestration	CDP Stack	Meets requirements

Directory of Audited CDP Capabilities

For a full description of CDP capabilities please see the [RealCDP Audit Guide](#). Below is a brief description of each CDP capability reviewed in the RealCDP Certification Audit. To qualify as a RealCDP a vendor must fully support all Core CDP capabilities.

CAPABILITY	TYPE	DESCRIPTION
Ingest Data	Core CDP	Data ingestion and data capture capabilities for all data types
Maintain Data	Core CDP	Maintain and manage all required customer and demand-side data
Store Historical Data	Core CDP	Store all detailed historical and longitudinal data required by Users
Unified Customer Profile	Core CDP	Create and manage unified customer profiles
Share Customer Data	Core CDP	Distribute and/or syndicate data wherever (and ideally whenever) needed
Channels & Connectors	CDP Enhancement	CDP supported Channels and available Connectors to capture and distribute data
3rd Party Applications	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
Real Time Updates	CDP Enhancement	Real-time update capabilities that capture data (ideally in less than 10 seconds)
Real Time Customer Profile	CDP Enhancement	Real-time customer profile extracts delivered where needed
Data Hygiene	CDP Enhancement	Data scrubbing, filtering, standardizing, formatting, and matching capabilities
End User Training	CDP Enhancement	End User training, workshops, documentation, and educational materials
Analytics	CDP Stack	Analytic solutions to build and enable algorithms, models, reports, and analysis
Personalization	CDP Stack	Program Personalization solutions including tools, technologies, and techniques
Journey Orchestration	CDP Stack	Customer Journey Orchestration solutions for multi-touch, multi-channel marketing