



How to Evaluate Customer Data Platforms

Gartner defines a customer data platform (CDP) as “a marketing system that unifies a company’s customer data from marketing and other channels to analyze customers, enable modeling, and optimize the timing and targeting of communications.” In other words: A CDP pulls all your customer data into one place and helps make it actionable.

What does that look like in practice? When you’re evaluating CDPs, make sure they include these four core features recommended by Gartner:

1

Data collection

- Gathers first party, individual-level data from your customers
- Gathers this data from multiple sources
- Collects a combination of the following information types:
 - Identification (e.g., names, emails)
 - Demographic (e.g., gender, region)
 - Behavioral (e.g., purchase history, previous interactions)

2

Profile Unification

- Consolidates profiles from separate customer devices/records to the right individual
- Removes or consolidates duplicate information (e.g., a single customer with multiple email addresses)
- Aggregates customers into a household or group account, if desired

3

Segmentation

- Creates rule-based customer segments
- Manages customer segmentation
- Leverages predictive analytics to automate and suggest new segments

4

Enable action

- Allows users to create data-driven personalized customer experiences
 - Can send segments and instructions to a separate personalization tool
 - May execute personalization instructions without requiring a separate tool