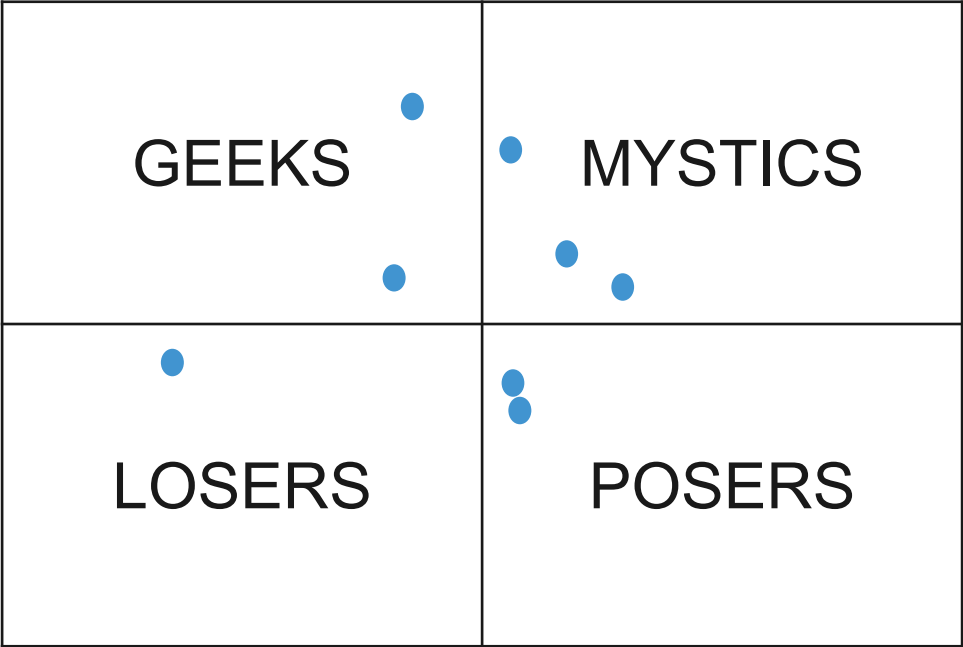


# The Right Way to Select CDP Technology

August 18, 2021

# A Different Kind of Analyst Firm...



“the mystical quadrant”

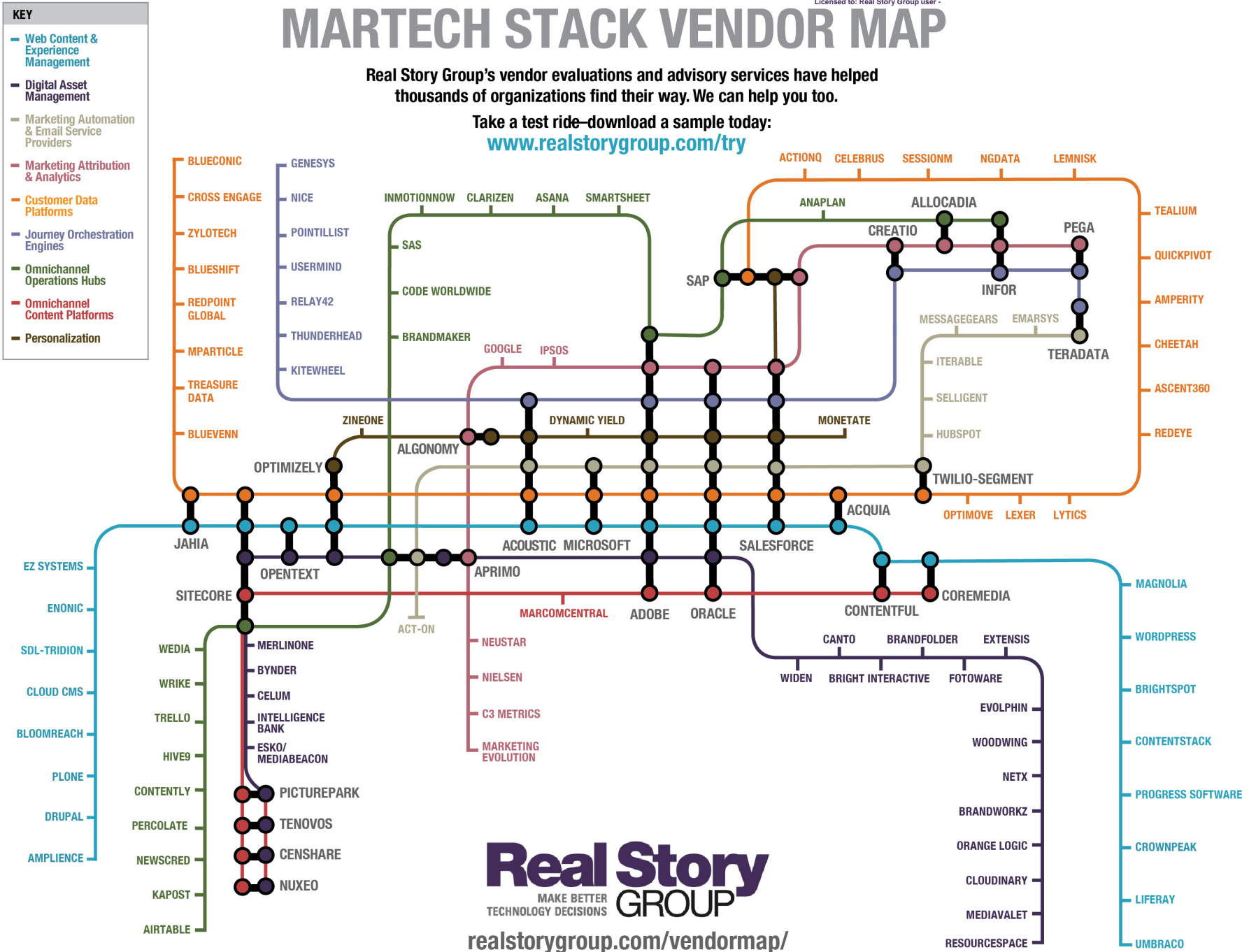
INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	NO	YES
SPEAK AT VENDOR EVENTS?	NO	YES
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	NO	YES
WRITE PAPERS FOR VENDORS?	NO	YES

# MARTECH STACK VENDOR MAP

Real Story Group's vendor evaluations and advisory services have helped thousands of organizations find their way. We can help you too.

Take a test ride—download a sample today:

[www.realstorygroup.com/try](http://www.realstorygroup.com/try)



# Agenda

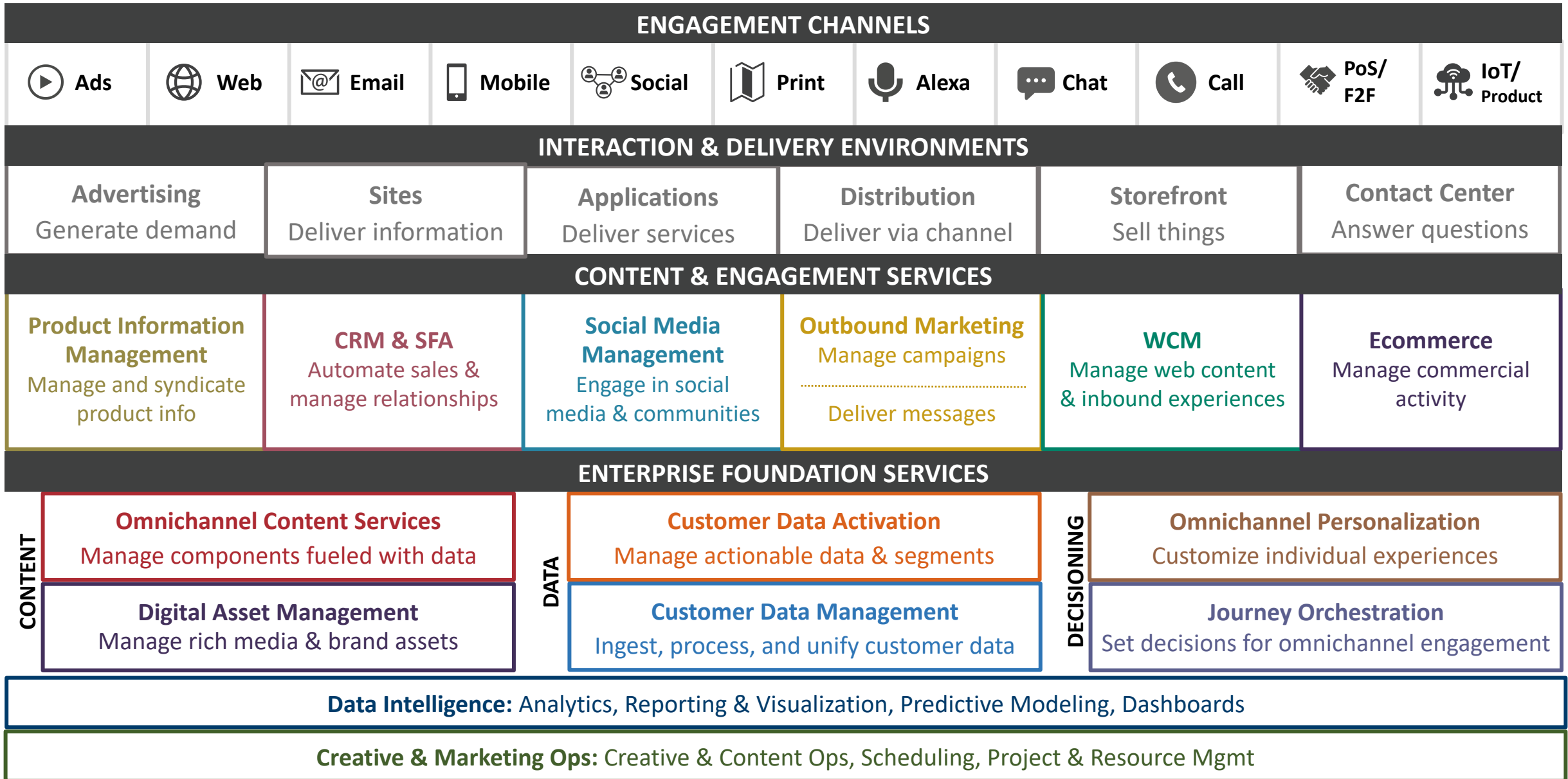
## **Key Architectural Decisions**

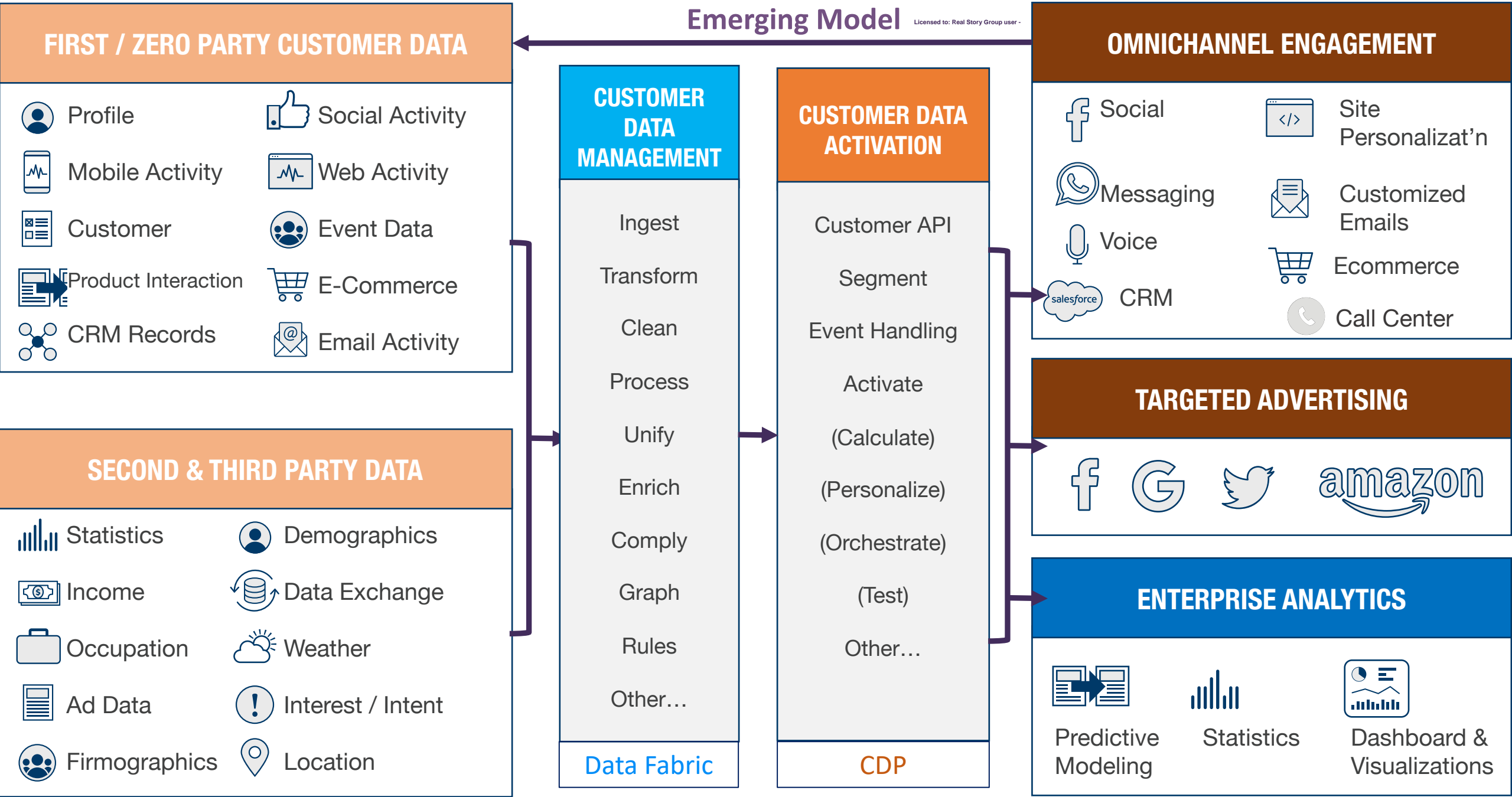
**CDP Marketplace**

**The Right Way to Select a CDP**

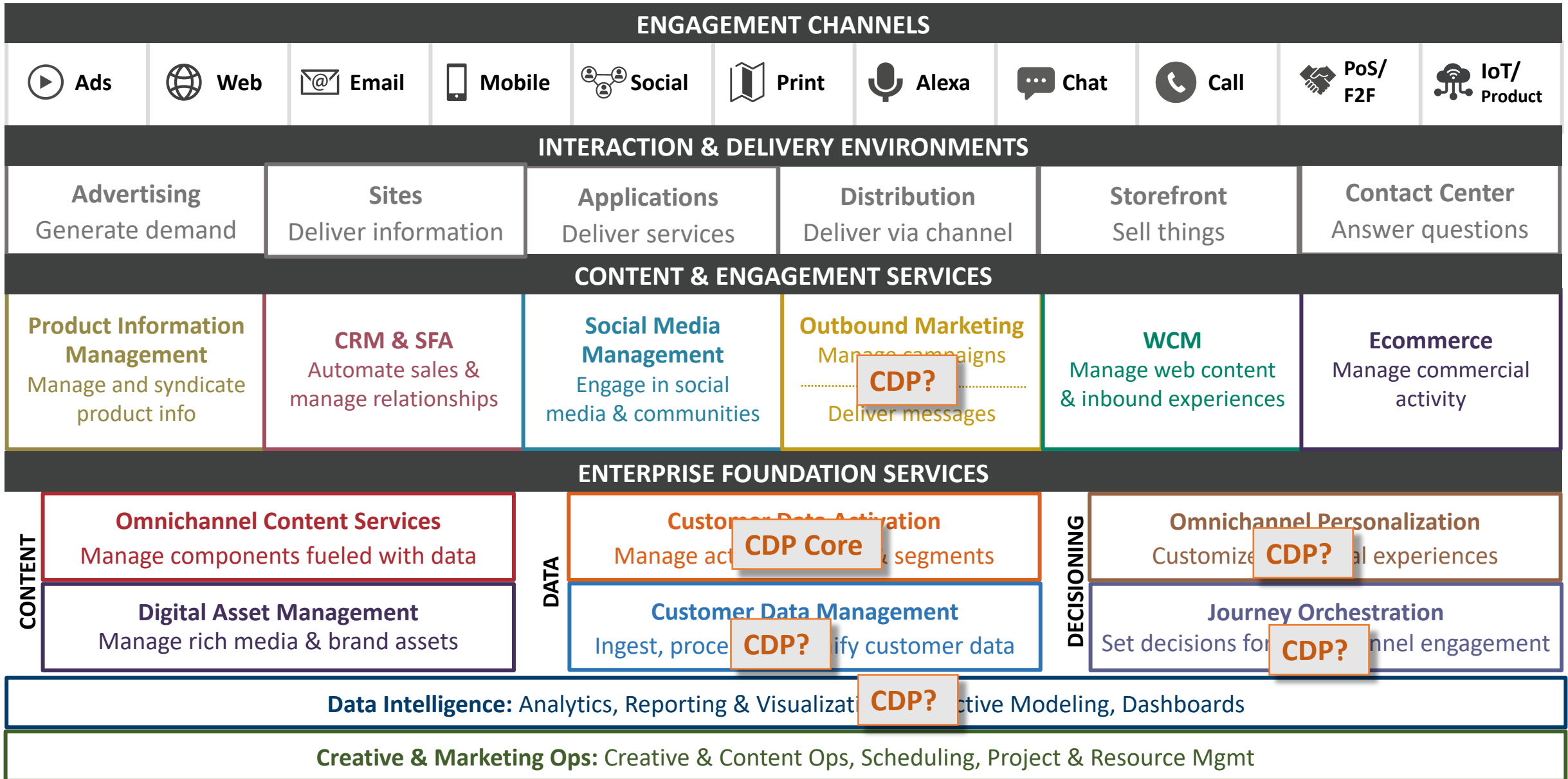
**Key Take-Aways**

# RSG MarTech Services Reference Model





# Key Options for Vertical and Horizontal Scope



# Agenda

## **Key Architectural Decisions**

### **CDP Marketplace**

## **The Right Way to Select a CDP**

## **Key Take-Aways**



# CDP Market: Fragmentation Persists

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## Suite Vendors



**acoustic**

**Acquia**

**ORACLE**

## Pure-Play Platforms



blueconic



lemnisk



RedEye

NG DATA

dun & bradstreet

ACTIONIQ



optimove

QuickPivot

Amperity &

CrossEngage

Segment



Ascent360

celebrus

ALGONOMY

## Suite Vendors



Microsoft



**acoustic**

**Acquia**

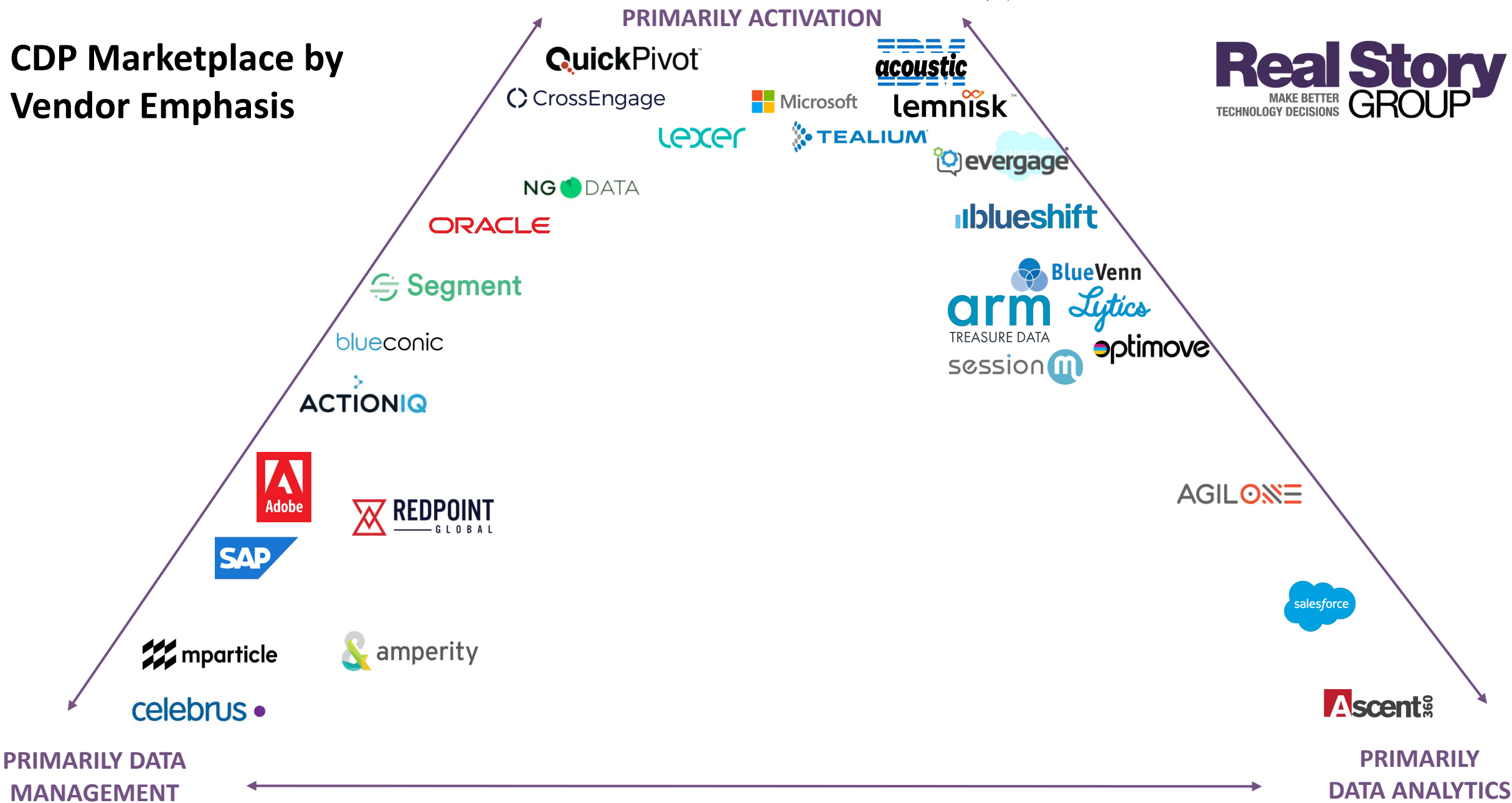
**ORACLE**

## General Observations About These Vendors:

- Brands are well-known but...
- Their solutions are newer and generally thinner
- Tend to be very parochial: focus on aligning data in their own stacks rather than independent layer
- Tend to rely on / bind you to other solutions in their suites
- Tend to be comparatively much pricier

# CDP Marketplace by Vendor Emphasis

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# Agenda

**Key Architectural Decisions**

**CDP Marketplace**

**The Right Way to Select a CDP**

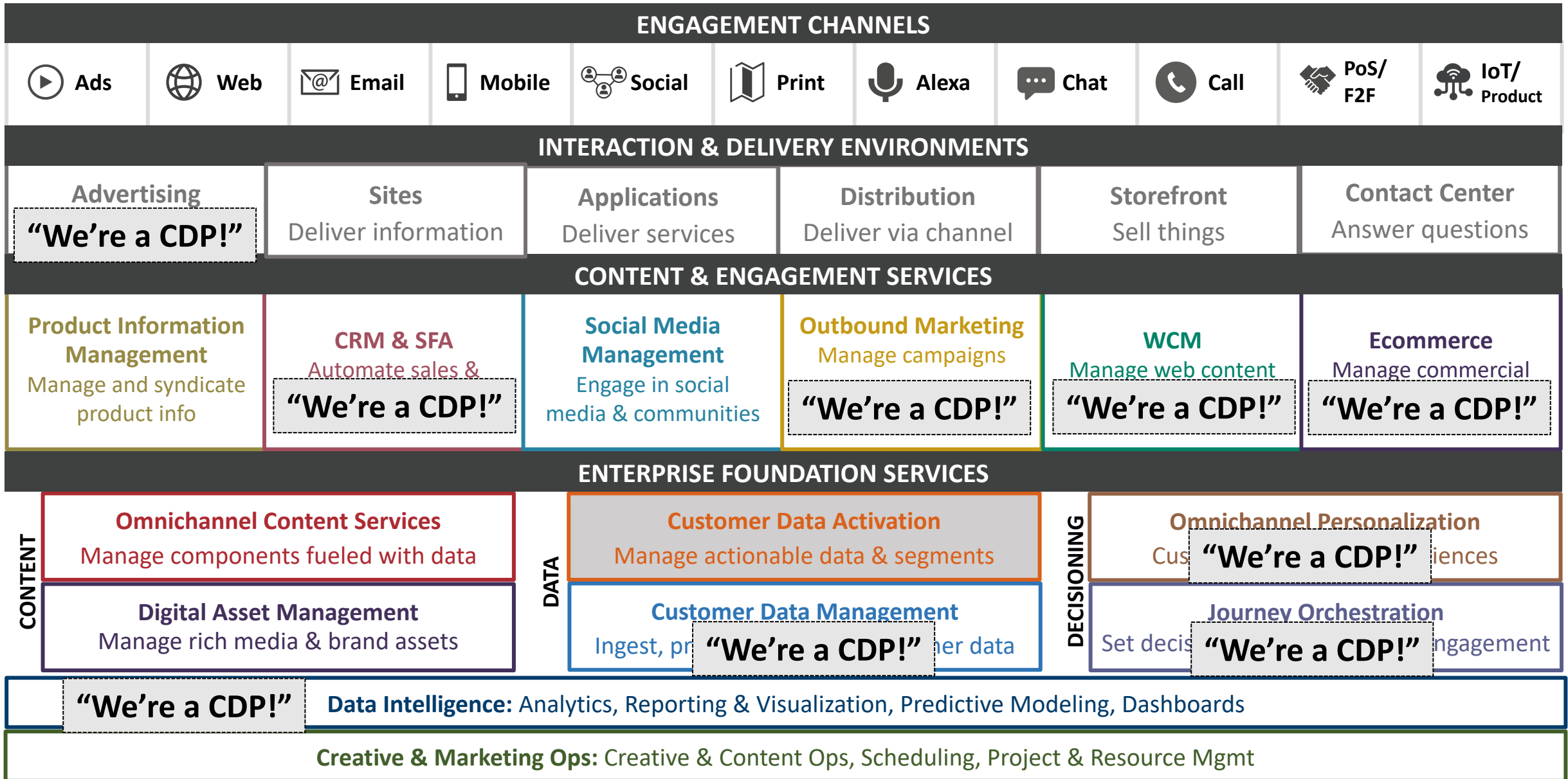
**Key Take-Aways**

# Four Traditional Approaches to Evaluation...and a Bonus





# Caveat: What Other Vendors May Try to Sell....

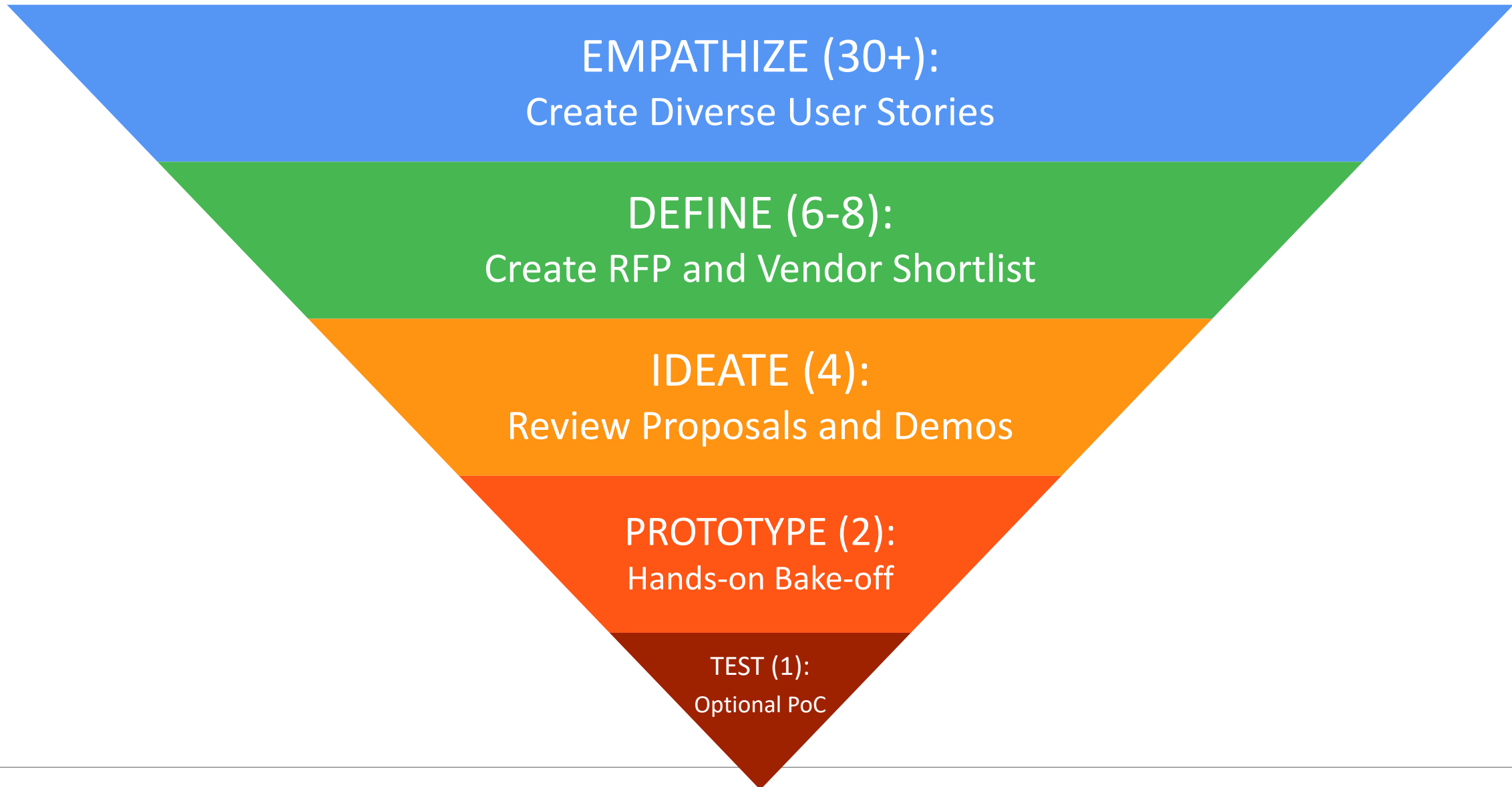


Term of the Day....

**“Design-Thinking”**  
**Business-focused**  
**Team-based**  
**Empirical**  
**Iterative**  
**Adaptive**



## How to Filter...





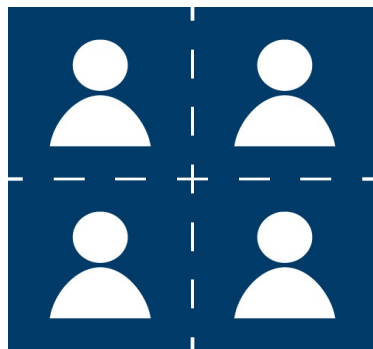
# Ten Potential CDP Business Use Case Categories



Advanced Customer  
Data Management



Predictive Analytics



Outbound Marketing  
Campaign Support



Online Personalization  
& Experience Optimization



Ecommerce Recommendations  
& Optimization



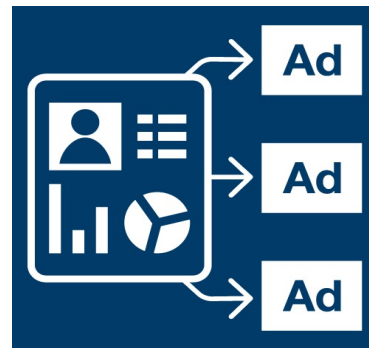
Omnichannel  
& Offline Aggregation



Realtime Behavioral  
Analysis



Household / Channel  
Support



Digital Advertising  
Support



Loyalty & Rewards  
Management

## Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Do you want the CDP platform to **support** or **execute**?

# Generate a “Real” Quadrant

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RealStory

20 Years GROUP

LOGOFF

CDP use cases

RealQuadrant™  
SHORTLIST GENERATOR

Get the right vendor shortlist based on  
Customer Data Platforms

STEP 1:  
Technology Marketplace

STEP 2:  
Criteria

STEP 3:  
Use Scenarios

Weigh the importance of each Scenario (optional)

Scenario	Weight
📌 Outbound Marketing Campaign Support	34%
📌 Omnichannel & Offline Aggregation	33%
📌 Digital Advertising Support	33%
<b>Total Weighting</b>	<b>100%</b>
Must equal 100%	

RealQuadrant

The RealQuadrant chart plots 26 vendors based on their Strategic Consideration Fit (Y-axis, 0-160) and Scenario Fit (X-axis, 0-100). Vendors are labeled as follows:

Vendor	Scenario Fit (X)	Strategic Consideration Fit (Y)
Vendor 26	10	55
Vendor 18	20	40
Vendor 8	25	65
Vendor 16	35	65
Vendor 27	35	55
Vendor 22	35	45
Vendor 3	40	45
Vendor 12	45	55
Vendor 19	45	45
Vendor 12	48	45
Vendor 20	50	50
Vendor 14	50	45
Vendor 25	50	45
Vendor 17	65	65
Vendor 15	65	55
Vendor 2	65	45
Vendor 9	65	40
Vendor 24	75	55

EMPATHIZE:  
Create Diverse User Stories

DEFINE (6-8):  
Create RFP and Vendor Shortlist

IDEATE (4):  
Review Proposals and Demos

PROTOTYPE (2):  
Hands-on Bake-off

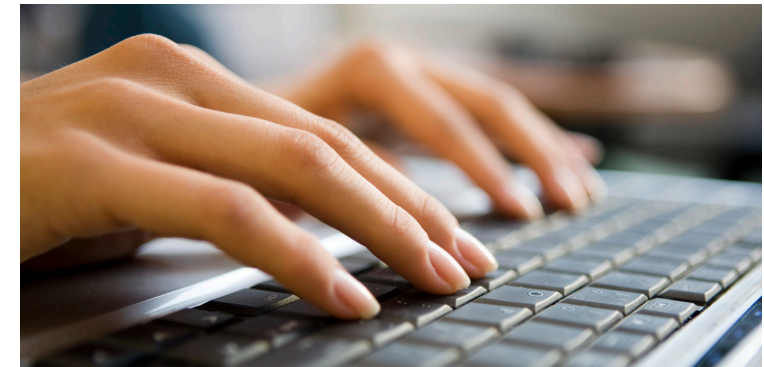
TEST (1):  
Optional PoC

Prototype

DO NOT SKIP!

Conduct competitive proofs-of concept:

- Real scenarios
- Real (“dummy”) data
- Real people
- Real environment



# Agenda

**Key Architectural Decisions**

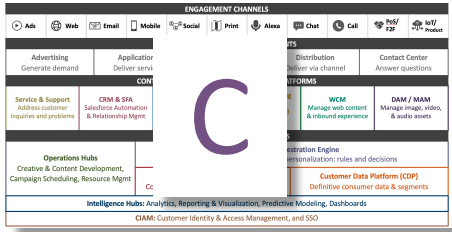
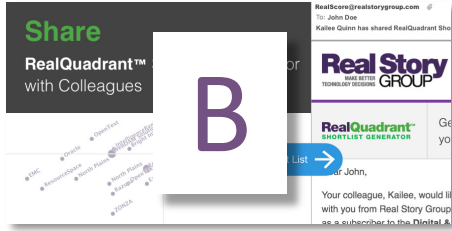
**CDP Marketplace**

**The Right Way to Select a CDP**

**Key Take-Aways**

# Key Take-Aways

1. CDPs are increasingly foundational to a truly omnichannel stack
2. You need to consider proper scope of CDP in your particular stack
3. CDP Marketplace likely to remain fragmented for some time
4. Large vendors starting to play, but continue to lag
5. Use architecture as filter, but **business scenarios** as your prime criteria
6. There are many different scenarios: you'll want to prioritize
7. Employ an agile-oriented selection process featuring adaptive testing
8. Try before you buy, even if that's labor intensive
9. RSG research and advisory will help you make the right decisions

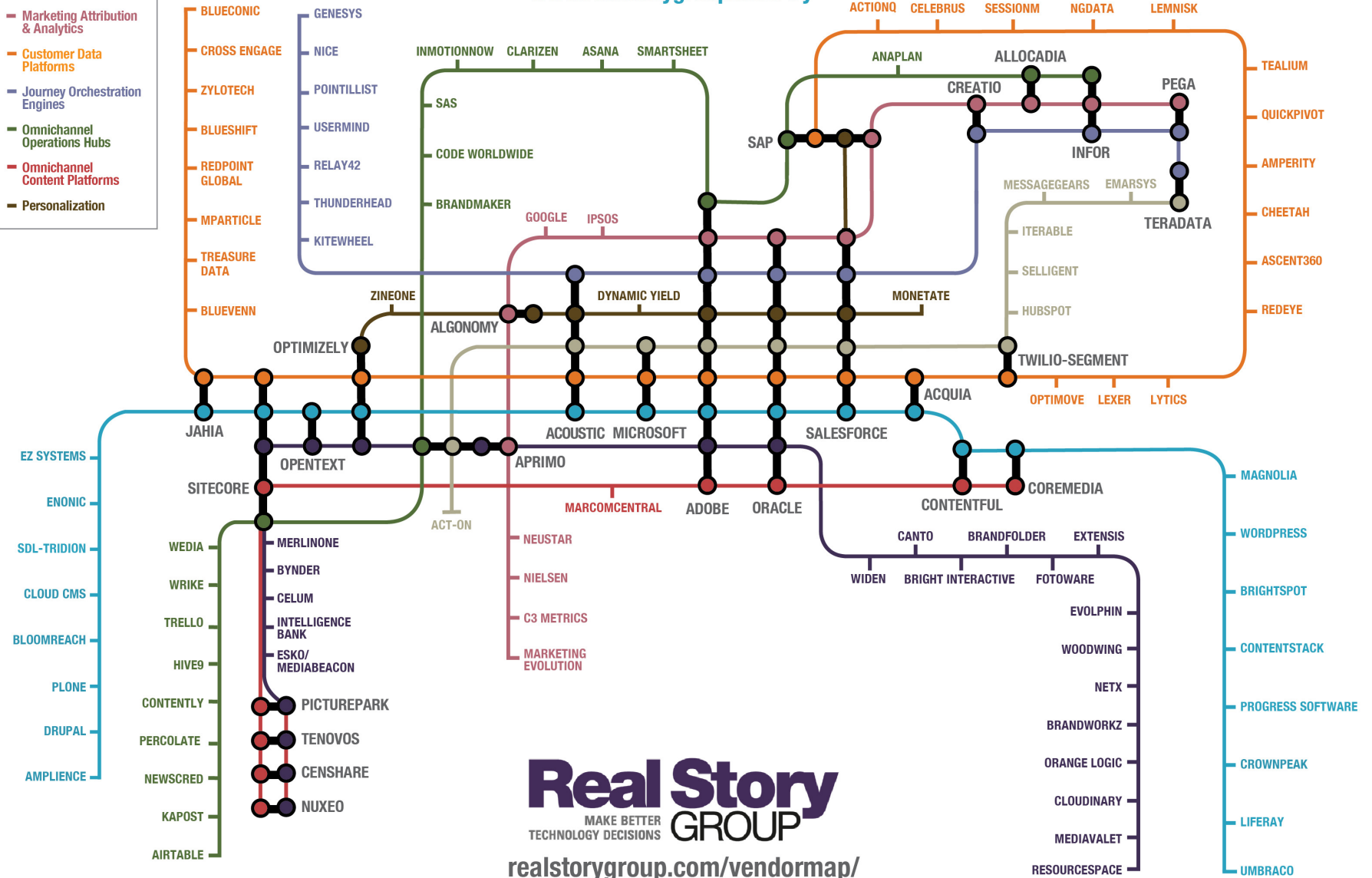


- KEY**
- Web Content & Experience Management
  - Digital Asset Management
  - Marketing Automation & Email Service Providers
  - Marketing Attribution & Analytics
  - Customer Data Platforms
  - Journey Orchestration Engines
  - Omnichannel Operations Hubs
  - Omnichannel Content Platforms
  - Personalization

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# Stay in Touch...

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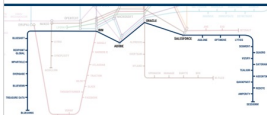
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[linkedin.com/company/realstorygroup/](https://www.linkedin.com/company/realstorygroup/)  
[www.realstorygroup.com/Sample](http://www.realstorygroup.com/Sample)

**Real Story**  
GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



Journey Orchestration  
Engine

**Real Story**  
GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



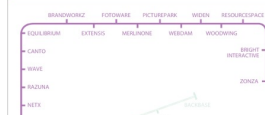
Customer Data Platforms

**Real Story**  
GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



Web Content &  
Experience Management

**Real Story**  
GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



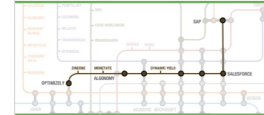
Digital & Marketing  
Asset Management

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MAKE BETTER  
TECHNOLOGY DECISIONS



Email  
&  
Marketing Automation

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GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



Personalization  
Platforms

**Real Story**  
GROUP  
MAKE BETTER  
TECHNOLOGY DECISIONS



Omnichannel Content  
Platforms

**Real Story**  
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Ecommerce Platforms  
Comprehensive Product Evaluations