

# Getting Started with a Customer Data Platform

Explore Successful Use Cases at Every  
Stage of Your Customer Lifecycle



# Proven Examples of How to Utilize Your CDP

A critical element of investing in a CDP is understanding and documenting how you plan to use it. Defining use cases upfront will help your organization align around a goal, process, and outcomes. From getting buy-in from executives early on and helping stage proofs-of-concept with outside teams to dividing up responsibilities and delivering quick ROI, your first use cases will shape the perception of your CDP initiative across the organization. There's no single "correct" first use case; where you begin depends on the

specific business challenges your company is trying to solve. Understanding the expected outcomes and how you'll get there from an early stage is important for a product with as much potential and flexibility as a Customer Data Platform.

On the next page we show a maturity curve and use cases that are common at each of the stages. Again, your organization may look different - but this is a helpful framework to get started if you need help.



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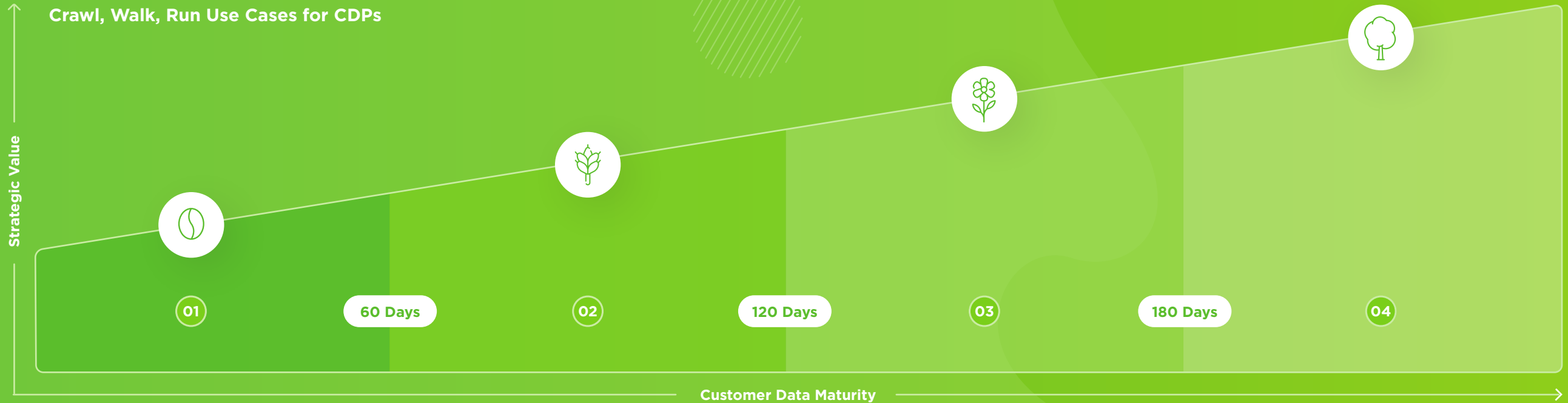
## INSIGHT



### **Epson America's crawl-walk-run approach built upon the shoulders of early successes.**

One of their first use cases revolved around an email campaign to remind customers they're low on ink for their printers. With just a timely reminder—no promotions, even—Epson ran a campaign with 7-8x more conversions than normal. Proving ROI here helped set the foundation for future iterations, like running paid search campaigns around shoppers looking for ink.

Nick Huang, Manager, Business Intelligence & Online Commerce, offered this advice to new CDP users looking to build a successful approach to use cases: "As you think about how you want to start your use cases, start with something super simple. And then build upon that to make it more complex and sophisticated."



**01 ADOPTION**

**Customer journey stage 1**

- Define and integrate data sources
- Data quality specs
- Define core use cases, attributes and audiences
- Define privacy and consent data

**02 GROWTH**

**Customer journey stage 2**

- Automate actions using audiences for core use cases
- Expand data sources
- Add file upload, POS data sources
- Expand email, analytics and other integrations

**03 OPTIMIZATION**

**Complete customer journey**

- Increase customer data supply chain visibility
- Create a more comprehensive view of the customer
- Orchestrate data across the customer lifecycle
- Distribute regulatory compliance through the supply chain
- Anticipate customer behavior and take proactive actions with machine learning

**04 EXPANSION**

**Scale use cases**

- Add more data sources
- Fully automate with business rules
- Expand use of machine learning insights
- Optimize the tech stack
- Focus on future-proofing your customer data

# Adoption and Growth Use Cases

## USE CASE 1

### Standardize and syndicate data

Defining and owning the data is a critical component for many companies, but keeping up those standards can mean lots of manual tasks. With a CDP, teams can manage the standardization and syndication of customer data from a centralized location that reduces the amount of manual processing required from these teams. Standardizing data by tying your channel-specific data sources (web, mobile, etc.) to a unique visitor ID will allow you to confidently implement downstream actions and build more advanced use cases later on.

**The percent of data in organizations that is dark— meaning companies don't know about or use that data.**

# 55%



The State of Dark Data, Splunk, 2019

## Operational Efficiency: Standardize and Syndicate Data

Minimize Time Spent on Repetitive Tasks and Lower Technical Barriers





USE CASE 2

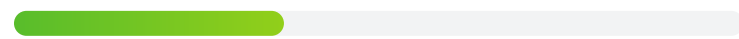
### Single view of the customer

Achieving a single view of the customer may seem like a use case that is only really valuable to marketing, but it's key for data and analytics teams to drive timely actions and derive relevant insights throughout the customer journey. As the upstream source of the single view of the customer for your downstream activation technologies, you're removing much of the manual labor that would be required to update each one individually—and doing so in real time.

In this example, you see eight channels benefitting from the insights of the CDP— four systems are taking actions while the other four systems are being updated with insights. The unified profiles in this example are being combined into groups of customers, known as Audiences, that allow for marketers and data analysts to work more intelligently.

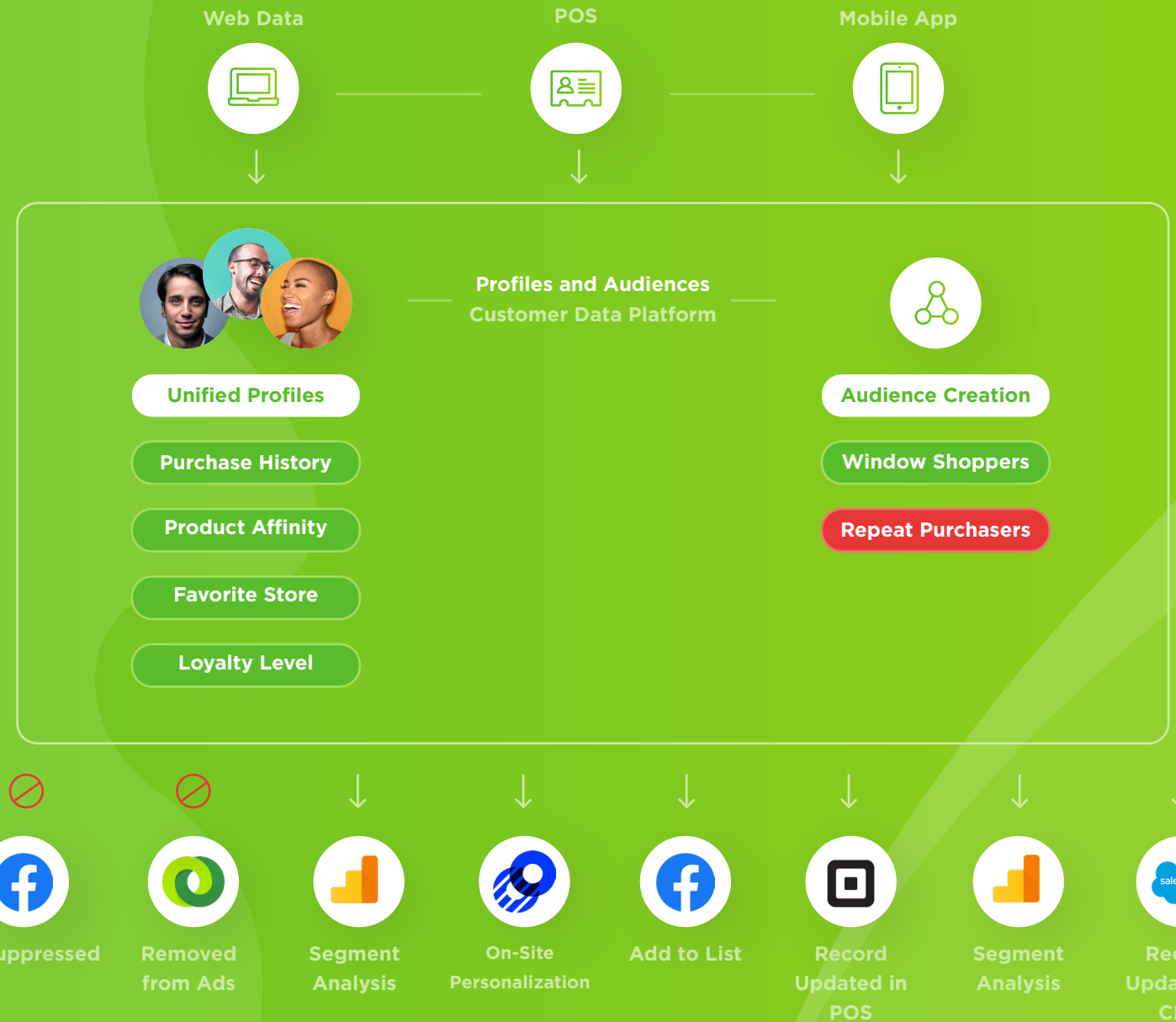
**The percent revenue increase of hospitality experts Barcelo Hotel Group by using customer-data driven insights from a CDP to improve their marketing campaigns.**

**37%**



## Single View of the Customer: Driving Customer Insights

Generate a Single View of the Customer to Drive Action and Analysis



USE CASE 3

Customer acquisition

One of the most powerful ways that marketers use a CDP is for customer acquisition. Specifically, building audience segments using cross-channel data to better target prospects. Customer insights that would normally only exist in one channel—like your mobile data—can now inform other channels to create more personalized ad and content recommendations.

Here we see a slightly more advanced example where the customer profile has data from the website, mobile app and point-of-sale informing the lifetime purchases she's made and insights into her behavior, like what topics she's interested in. In this way, you could trigger an ad tied to past purchases on Facebook, even though Facebook doesn't have data from your point-of-sale system.

For Marketing leaders

Taking control of the customer experience with a CDP presents Marketing leaders with a variety of use cases that will enable

- Personalization at scale to drive engagement and improve conversion
- Drive quality growth across the entire customer journey
- Optimize budget and resources

Two of the broad ways to understand the impact of the CDP on Marketing are through evaluating Customer Acquisition and Audience Suppression use cases.

Customer Acquisition: Cross-Channel Segmentation

Identify and Target New Prospects to Acquire Customers



## USE CASE 4

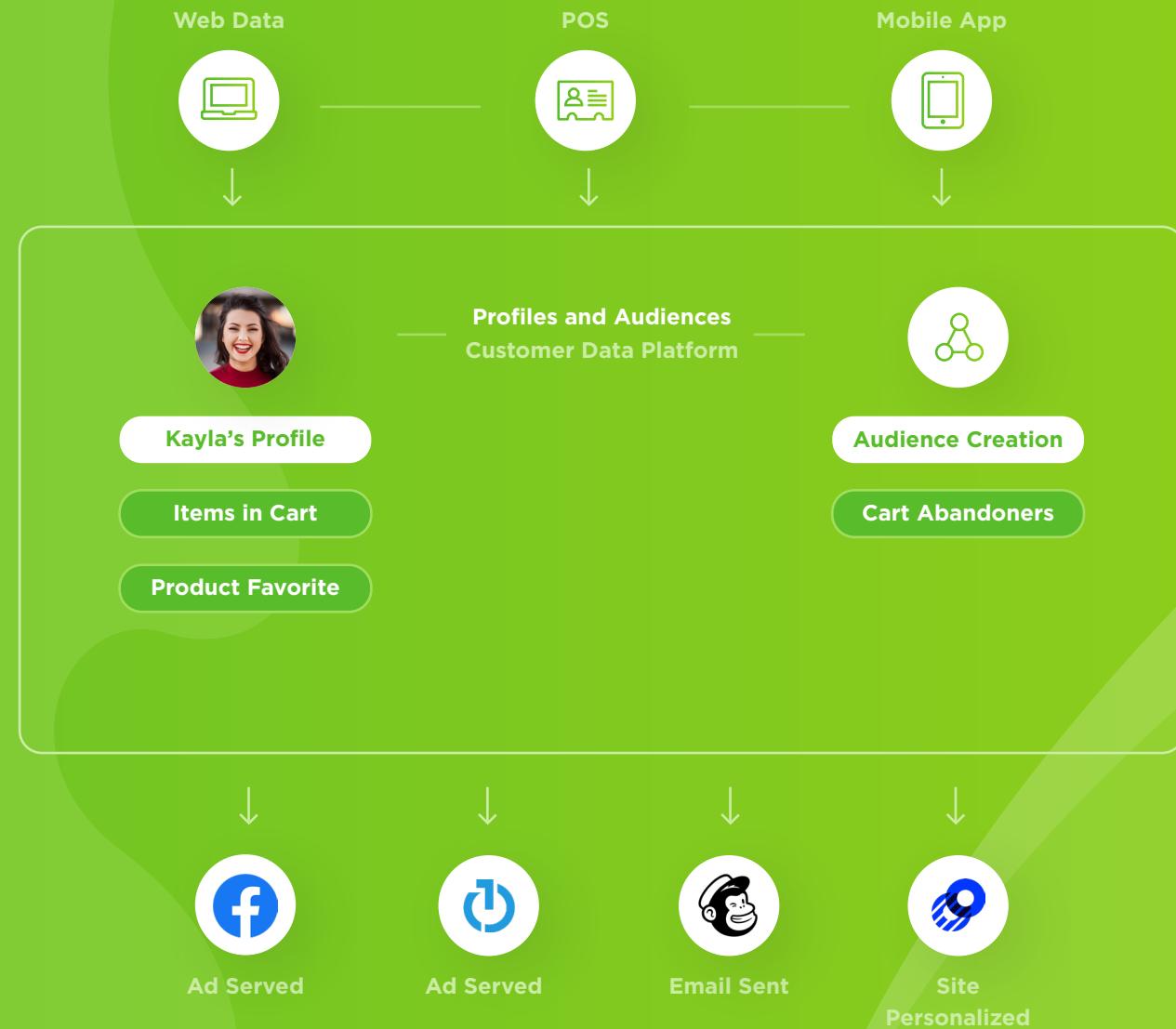
**Cart abandonment campaign**

Abandoned cart campaigns are a great way to put your newly acquired customers with unified customer profiles to work by providing relevant offers to your prospective customers and ultimately generating revenue.

A Customer Data Platform that can ingest data from web, mobile, and point-of-sale (in-store) systems, allowing you to identify customers who have abandoned carts online—and triggering the relevant ads or emails—while also suppressing cart abandoners who later make purchases in-store.

**Cross-Channel Cart Abandonment Campaign**

Identify and Target New Prospects to Acquire Customers



# Optimization Use Cases

## USE CASE 1

### Lookalike audiences

As data from third-party cookies dries up over the next few years, lookalike audiences based on current customer attributes will be a critical way to find new customers. Companies can define the attributes of their best customers and use that data in an advertising channel like Facebook to find new consumers with similar attributes.

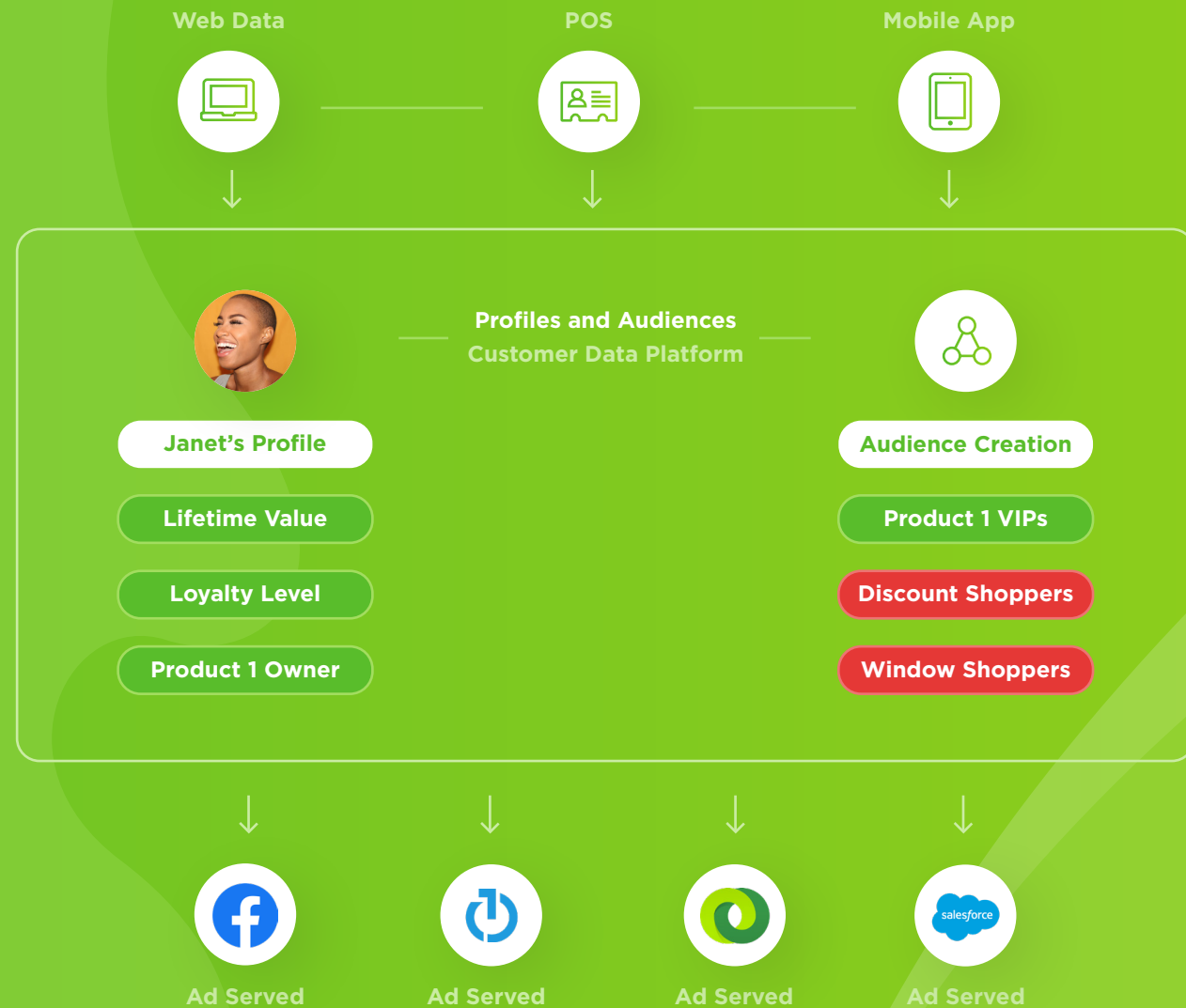
**With ad networks offering less reach in the future, creating lookalike audiences based on customer data will allow you to expand the scale of your acquisition program** without having to rebuild each audience in every channel.



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## Customer Acquisition: Targeting High Value Lookalike Audiences

Identify and Target New Prospects to Acquire Customers





USE CASE 2

### Location-based marketing

By marrying location data with behavioral data in a CDP, companies can automate actions based on more than product interests. When consumers enter a certain geographic location, such as a store or other point of interest, the right offer can be made in the moment to provide the best possible experience.

When your audiences are created and activation endpoints have been integrated with your CDP, location-based actions can be triggered across multiple channels. In this case, we can trigger a push message, email, website personalization and/or an SMS text message to these audiences, triggered by entering or exiting a physical store.

Personalization can reduce customer acquisition costs by up to 50%.

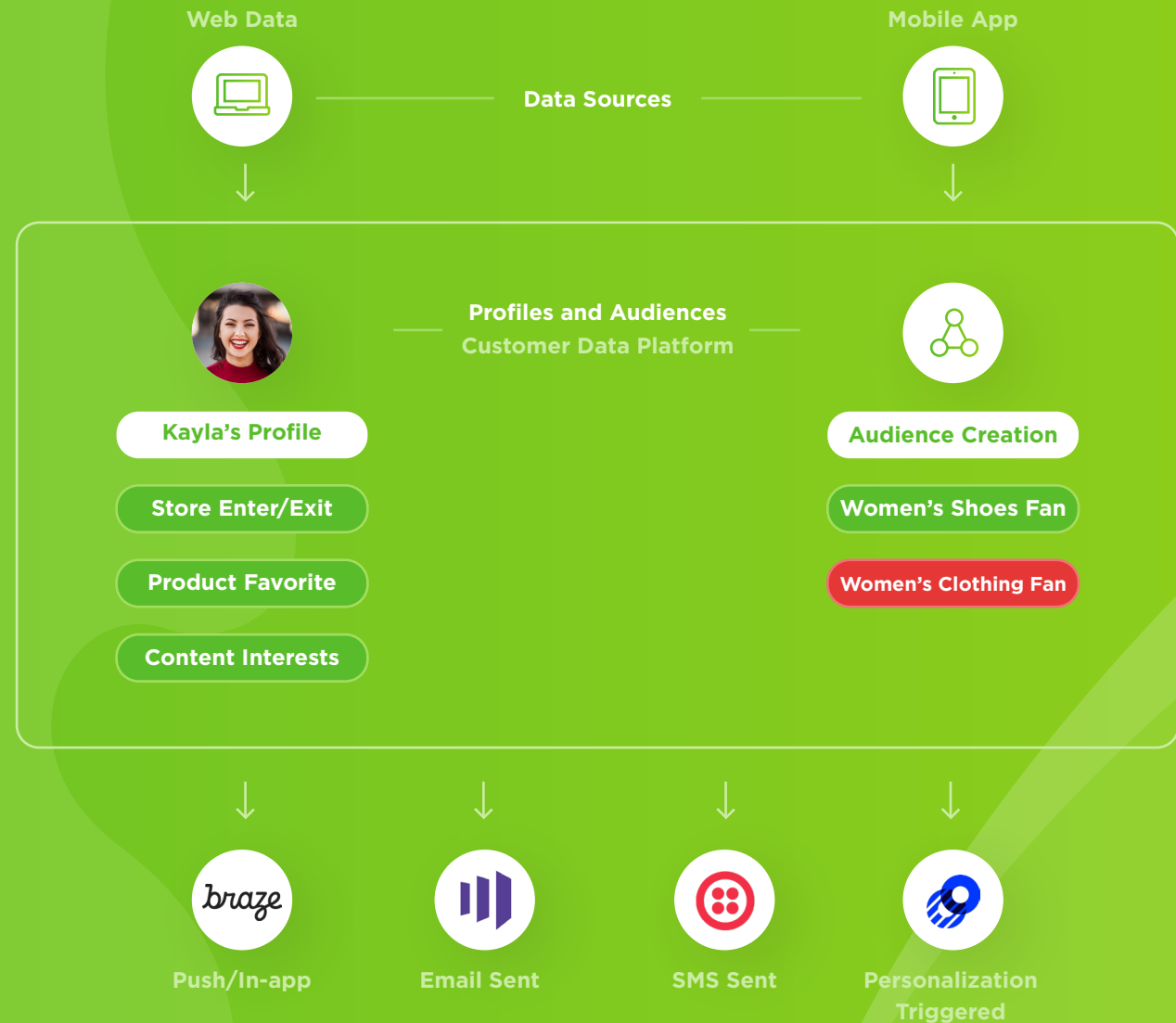
50%



Despite Recognizing the Importance of Personalization, Marketers Are Still Missing the Mark, Adweek, 2018

## Customer Acquisition: Location-Based Marketing

Drive CX and Media Efficiency by Excluding Audiences



USE CASE 3

### Honoring consumer consent in every channel

Whether it's GDPR, CCPA, or another privacy regulation, consumers now have many different ways to opt-in and opt-out of data collection, data usage, and contact methods. CDPs aren't responsible for getting consent from your customers (that's what Consent Management Platforms are for), but consent data can be tied into the customer profile to update preferences and act immediately to remove customers from the audiences and channels they've opted out of.

### For data and analytics leaders

Data scientists can spend up to 90% of their time wrangling data and cleaning it before getting to apply the models that actually derive valuable insights into the customer experience. With a CDP as part of a vendor-neutral customer data supply chain, these teams can access a single source of real-time, trusted data to create consistent and reliable insights.

CDPs help data and analytics teams discover new insights in data that might have otherwise been missed while spending time data wrangling, and activate those insights throughout the tech stack in less time. Greater confidence in the data opens up more paths to advanced data operations like machine learning.



# Expansion Use Cases

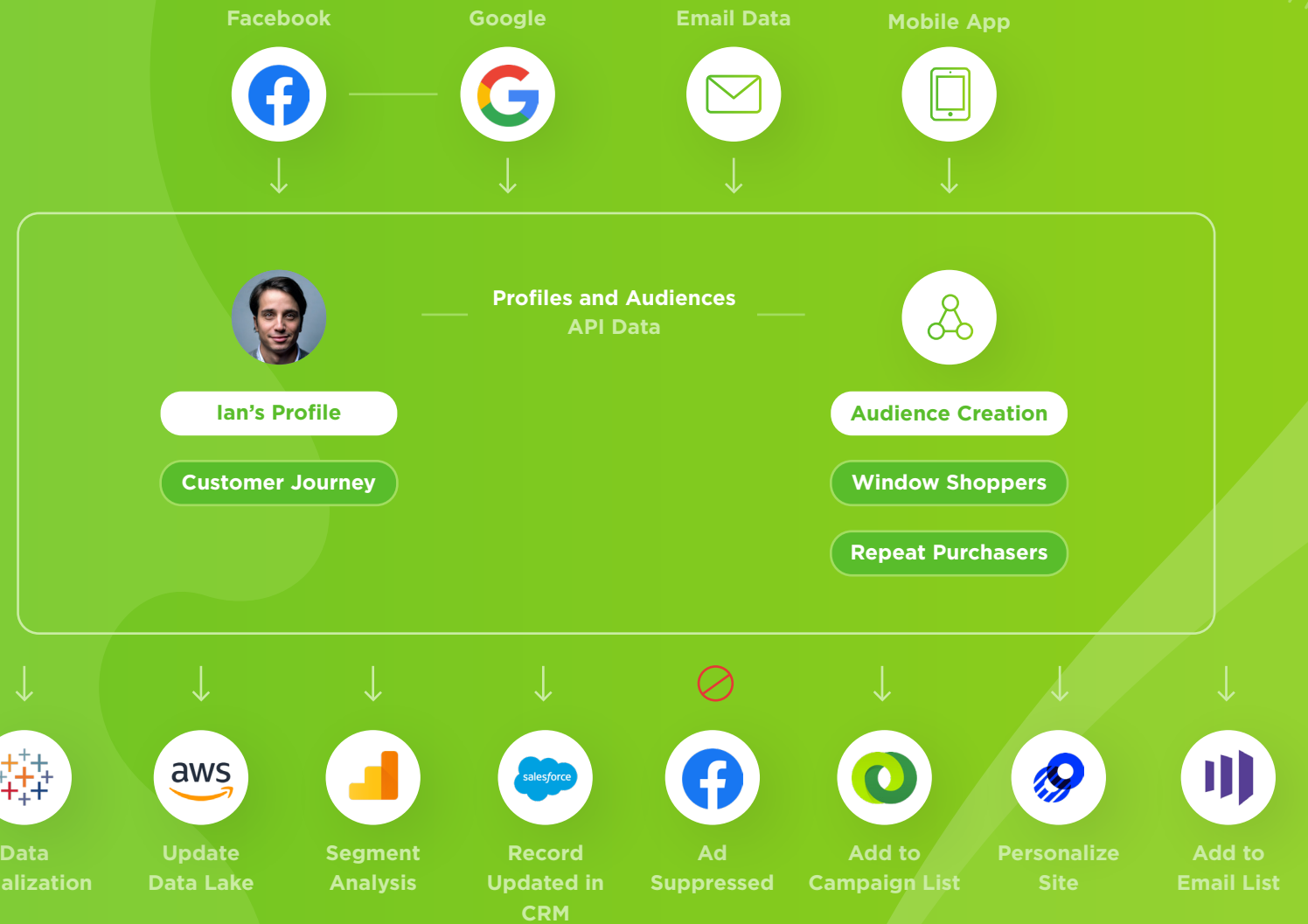
## USE CASE 1

### Customer journey attribution

Understanding the role of your many customer touchpoints in converting consumers is critical for CMOs looking to effectively analyze spend efficacy. With your Customer Data Supply Chain set up to collect all of your touchpoints, a real-time picture of the customer can be used to log the order of touchpoints. Once unified in the customer profile, this data can be sent to your BI tools for analysis and your activation points can be updated to suppress channels that are wasting spend.

## Customer Journey Analytics and Attribution: Driving Customer Insights

Understand the Sequence of Customer Engagement to Fuel Analysis and Drive Better Results



USE CASE 2

### Convert high-value customers with machine learning insights

One of the most challenging parts of Machine Learning initiatives is getting clean, consistent data into these algorithms and gleaning actionable insights out of it.

**Clean, unified customer data from a CDP can be used to fuel your data science team's own algorithms, or it can be layered in natively by a CDP that has ML capabilities (like Tealium AudienceStream™ with Tealium Predict ML™) at the point of the customer profile to create predictive audience segments.**

One simple audience segment is “likelihood to make a purchase,” allowing you to increase conversions with better ad targeting. To do this, Machine Learning provides a score to customer profiles that are used to create Audiences. Combine that with other attributes such as “VIPs,” and you can conserve ad spending by weeding out consumers who are least likely to convert.

**Companies using advanced personalization report a \$20 return for every \$1 spent.**



The Value of Personalization Optimization for Retailers, The Relevancy Group, 2019

## Customer Retention: Convert High Value Customers

Identify and Target the Best Existing Customers to Drive Retention and Higher Lifetime Value





## USE CASE 3

## Managing restricted data

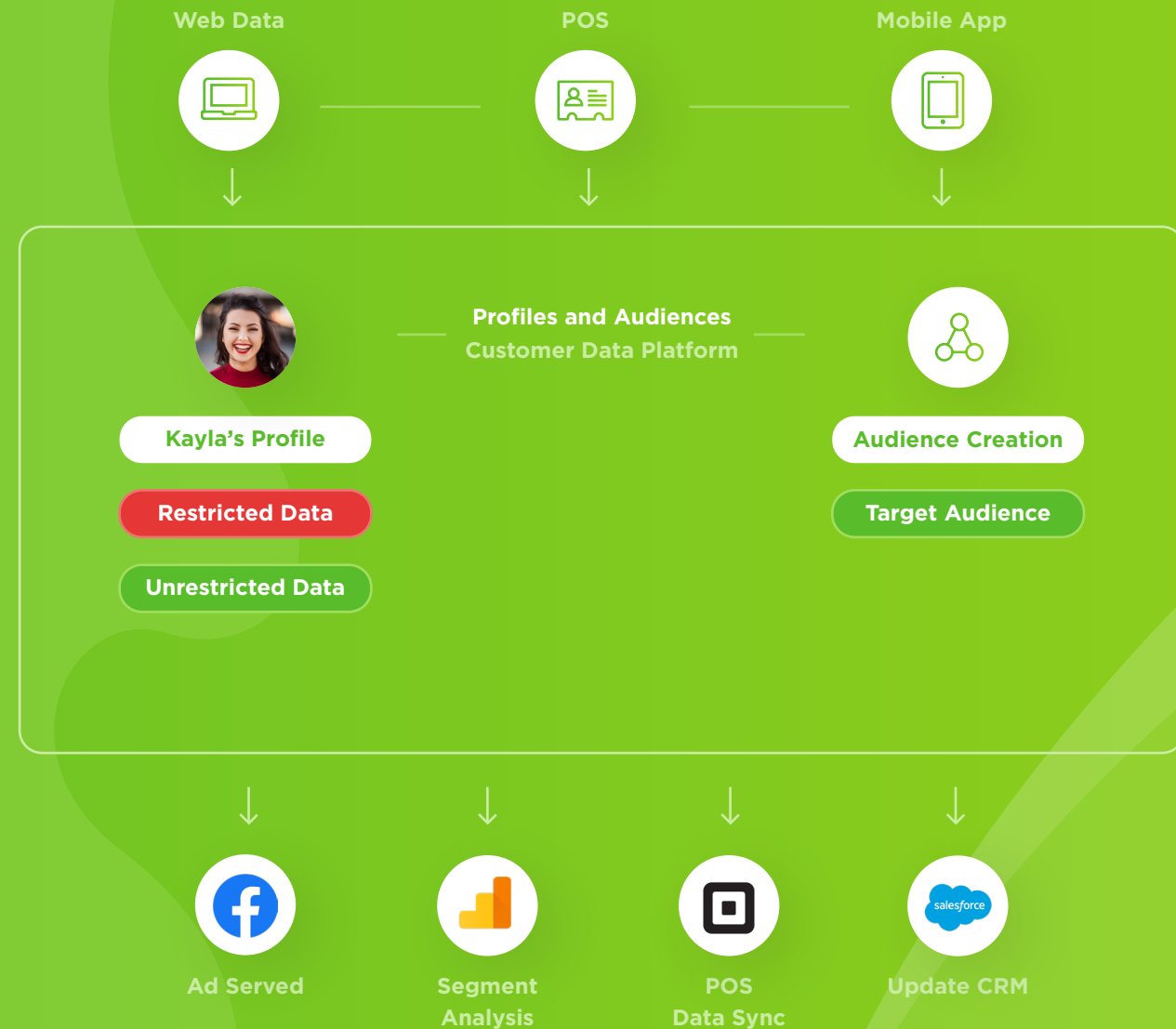
Data governance is critical to any data-driven company culture, and a CDP can play a critical role in keeping restricted data away from activation channels and third-party vendors. As data is being collected, data labels can be used to flag restricted data types (say, for example, a physical address) from being further populated into the customer profile or used in third-party systems. This automated flow gives greater control to data privacy teams and enables governance over the flow of incoming data prior to activation.

## For development and tech leaders

The teams responsible for providing a modern, best-of-breed technology stack for the rest of the company want to ensure it is used to its full potential. On top of that, they want to reduce risk to the organization by constantly improving data security and compliance procedures.

## Data Governance: Restricted Data Controls

Create and Operationalize a Data-Driven Culture



## CDP STORY

## Growing Alongside a CDP: The Utah Jazz

When the NBA's Utah Jazz started with Tealium three years ago, Jared Geurts, VP of Analytics and Digital Development, couldn't use web data from their own site to run advanced analyses. Now, with a Customer Data Platform as the foundation of their Customer Data Supply Chain, Geurts' team can intelligently use customer data from the entire experience to directly improve the fan experience. Over the years, they've scaled up from easy-wins to more advanced use cases, growing to support more teams who can execute campaigns without constant IT requests.



**They could now stitch together fan experience data with third-party platforms like Ticketmaster to gain a complete picture of the fan experience across their eight main channels.**

### Taking control of the data behind the fan experience

Before Tealium, the Jazz were able to run analytics on their web properties, but those insights remained siloed away from other business units.

**By combining a Tag Management System with a Customer Data Platform, the Utah Jazz were able to deploy two use cases that solved fundamental data challenges.**

First of all, they could now use first-party data from their fans' web experiences to influence email marketing and sales outreach.

Furthermore, they could now stitch together fan experience data with third-party platforms like Ticketmaster to gain a complete picture of the fan experience across their eight main channels. These changes allowed them to monitor performance and adjust spend in real time and set the stage for many of their future use cases.



INSIGHT

## Before Tealium

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## Scoring with targeted, audience-based experiences

After bringing their fan experience data in-house with a CDP, Geurts' team, together with the Utah Jazz marketing department and partner advertising agency, looked to expand the reach of it through targeted marketing campaigns. At the time, 30-year season ticket holders received the same messaging as first-time fans. With a wealth of info from surveys, ticket sales, ticket scans, and sales reps, they leveraged their CDP to create new audiences for their campaigns.

When compared side-by-side with non-targeted campaigns, the CDP's insights led to a 50% cost reduction, a 30-140% increase in click-through rates depending on the channel, and increased return on ad spending of 62% in just the first season.

## Scaling up personalization and unexpected benefits

With all of their fan experience data in their CDP delivering actionable audience segments, Geurts' team sought new use cases to extend the value of their CDP. This has included **abandoned cart campaigns, which generate in excess of \$100,000 in revenue each season**; personalizing offers based on historic behavioral data (if a consumer attends games to see the visiting team, they only make offers for those games, for example); and implementing A/B testing based on insights gained from the CDP. **The Jazz even ran simple A/B testing around making ticket recommendations. When visitors read an article with a ticket recommendation on their site, revenue per visitor increased 34% with that one simple change.**

By starting with achievable use cases that set the foundation for later success, the Utah Jazz continue to open up opportunities for improving the fan experience in unexpected ways. With a robust data foundation in place, CX enhancements like upgrading the app experience during the game or revealing cross-sell opportunities across their parent company's multiple venues, are not only realistic but quickly achievable parts of the roadmap.



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**50% cost reduction**  
for CDP-driven campaigns

**30-140% increase**  
in click-through rates depending on the channel

**62% increase**  
in return on ad spend

**34% increase**  
in revenue per visitor

**\$100,000 in revenue**  
for abandoned cart campaigns per season





## We Connect Data So You Can Connect With Your Customers

Tag Management • API Hub • Customer Data Platform and Machine Learning • Data Management

Tealium connects customer data— spanning web, mobile, offline, and IoT devices— so brands can connect with their customers. Tealium’s turnkey integration ecosystem supports over 1,200 client-side and server-side vendors and technologies, empowering brands to create a unified, real-time customer data infrastructure. The Tealium Customer Data Hub encompasses tag management, an API hub, a customer data platform with machine learning, and data management solutions that make customer data more valuable, actionable, and secure. More than 1,000 businesses worldwide trust Tealium to power their customer data strategies.

For more information, visit [www.tealium.com](http://www.tealium.com).

Omnicom Precision Marketing Group (OPMG) aligns Omnicom’s global digital, data, and CRM capabilities to deliver precisely targeted and meaningful customer experiences at scale. Using its universal framework of connected data, connected intelligence, and connected experiences, OPMG provides services that include data-driven product/service design, technology strategy and implementation, CRM / loyalty strategy and activation, econometric and attribution modeling, technical and business consulting and digital experience design and development. At the core of delivering these services is Omni, an advanced technology platform that combines a powerful cultural insights engine with massively scaled data insights from the first-, second- and third-party sources, including several proprietary Omnicom data partnerships.

OPMG



CREDERA

