

Step-by-step CDP Readiness

Best practices for enterprise Customer Data Platform (CDP) preparation

Checklist



As marketers realize the value of creating more personalized customer experiences without a lot of heavy lifting from IT, enterprise CDPs are enjoying tremendous growth.

In our efforts to help leading enterprises realize the benefits of a CDP, Treasure Data has gathered a wealth of best practices that organizations can use to succeed with CDP systems. Review your organization's readiness in these three key areas and check off your progress.

1. Get your strategy ready.

The most successful CDP implementations start with organizational readiness for the new system. Our clients find that Treasure Data is so powerful because it makes data available across departments and teams, and removes the need for multiple systems. A CDP can be instrumental in prompting strategic conversations that unite siloed teams around business objectives. While a CDP shouldn't dictate your organizational structure, we suggest you think strategically about how to best take advantage of a single view of every customer.

Evaluate all the ways a CDP aligns with your organizational strategy.

This will be key to ensuring that your organization enjoys broad value from your CDP, even if you don't implement all aspects of it from day one. A CDP is not just a marketing system; it can help product, design, innovation, and customer support teams improve the overall customer journey. Evaluate how the CDP will impact all critical business goals, and use that message to sell the investment to your executive team.

Decide which CDP use cases are most critical and pick one or two to get started.

Use cases can relate to analytics, advertising, conversion rates, and customer experience. Whether you want to track your products better, launch and optimize campaigns, or identify your next top ten customers through predictive lead scoring, go after your best use case and scale from there. It's important to demonstrate value to your stakeholders and team early, so we recommend starting with just a few high-impact examples to prove the benefits of a CDP immediately.

For example, Shiseido, a multinational personal care company that produces skin care products, hair care products, cosmetics, and fragrances, focused its initial CDP efforts on an online loyalty app. After just one year using the consolidated data for the app, in-store revenue increased by 20%.

Align your use cases to measurable KPIs, so you can track your progress and make real-time adjustments.

The more clearly you can define the desired business outcomes, the more likely you'll see immediate value from your CDP.

2. Get your data ready.

CDPs are great at addressing the most complex aspects of data—velocity, variety, and volume—and creating a cohesive customer picture. Increasingly, organizations are dealing with a larger volume of data, including truly innovative, unstructured data coming from connected, Internet of Things (IoT) devices. The quality of your data is crucial in building valuable, insightful customer profiles.

You likely already have systems across your organization that capture first-party data, including customer profiles, online or offline transactions, website engagement, and more. Identifying all the data sources you want to connect to your CDP is your first step. From there, a CDP should be able to take over the process of importing and keeping that data, so you have easy access to real-time information.

Assess your data, data sources, and the integration capabilities of your existing solutions, including data you can't currently use in your marketing or product development efforts.

You may need to coordinate with IT and other groups across your organization that manage their own systems. You should also evaluate your priorities for cleaning the data in each system.

CDPs can also open up opportunities to use data that has been previously untapped. Survios, a game developer that created the first VR-exclusive game to reach #1 on Steam's Global Top Sellers list and the first VR game to make \$1 million in a single month, wanted to understand how its games were being played. This would involve tracking players' body movements—a capability that the gamemaker didn't have in-house. With Treasure Data CDP, Survios was able to collect IoT body movement data from connected devices that is helping Survios improve player onboarding and increase engagement.

Where appropriate, identify existing second- and third-party data providers that enrich the data you already own.

You may be already using outside data to enrich your own first-party data when you want to provide additional context for activities such as fine-tuning your marketing segmentation. Ensure that you are considering integrating these data sources with Treasure Data.

Coordinate with IT and other systems administrators to get access to your customer data silos for CDP integration.

Develop privacy and security guidelines to ensure that data is used appropriately.

Treasure Data CDP enables the safe transit of data from your various integrated systems, but it's still incumbent on marketing teams to have clear processes and procedures in place to ensure that data is used appropriately. You should consider not only compliance with regulations, like GDPR, but also your internal organizational rules that reflect your company's values and desired customer relationships.

3. Get your people ready.

CDPs are all about breaking down silos, giving more people access to valuable information, and making data easier to use, so it's important to have total transparency when it comes to your CDP solution—as well as awareness and buy-in from the top down. Treasure Data is designed for easy implementation and quick time to value—organizations can swiftly plug in multiple systems to build a single customer profile and put data at marketers' fingertips—but we've seen buy-in issues hamper the normally quick adoption of our CDP. Successful CDP adoption is not only about technology, but also about culture. When your people align behind the intent and results of a CDP project, your organization will embrace the system faster and see results more quickly.

Involve business leaders and key stakeholders in choosing the best CDP solution.

Make sure leaders understand the value of unifying data to provide a 360-degree view of every customer and are willing to champion a data-driven culture powered by your CDP. Marketers are increasingly being asked to not only prove ROI, but also show specific contributions to growth. Understand the KPIs that your company is targeting. For instance, Subaru's marketing team needed to accurately understand the buyer's journey and effectively deliver content and messages to target buyers at the right times. Click-through rate (CTR) was a key metric to understand if their efforts were successful. After implementation of Treasure Data CDP, Subaru saw a more than threefold increase in advertising CTR.

Choose at least one business owner for your CDP, dedicated to managing CDP projects, implementing use cases, and training users.

If you're going to be a data-driven business, you need data-driven people in your organization. While you might not need them right away, you should think about hiring specialists such as data engineers and lead generation managers to assist with your ongoing CDP engagement. For instance, Panasonic built a team of specialized data marketers (Data Marketing Center), charged with using the Treasure Data CDP to provide the right analysis at the right time to 35 internal promotions specialists.

Build a CDP training and awareness plan.

Low adoption, driven by lack of buy-in or understanding, can sink your whole investment in CDP. Beyond your traditional and digital marketing teams, everyone in your organization should know what is possible with a CDP. It's important that leaders prioritize resources for the CDP, and that staff are enabled to leverage a CDP's power to unlock further business understanding.

You may not be able to achieve all of the steps above perfectly. However, understanding each of these considerations can set your CDP initiative up for success. Giving all your operational systems access to real-time customer data—across interaction points, devices, and applications—can lead to breakthrough customer experiences and organizational results, especially if you're ready to roll from day one.



Treasure Data Customer Data Platform (CDP) empowers enterprises by delivering rich insights that drive outstanding customer experiences. Built on a strong data management foundation, our CDP enables brands to securely unify customer data across silos at scale so they can better identify, engage and acquire customers. The highly configurable platform boasts a comprehensive connector network that evolves with your existing technology stack to future-proof all customer data initiatives. Treasure Data has more than 400 customers including Fortune 500 and Global 2000 enterprises, and is a wholly-owned subsidiary of Arm Ltd.

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