

What does a CDP Project look like?

It will vary greatly depending on your endpoints and where the data will be headed once it's combined in the CDP into new forms. But whatever technology you are using, it will typically follow distinct phases as listed below, (assuming that provisioning will be handled by your CDP vendor).



STEP 1

Workshops

Kick off phase to identify all the key stakeholders, data sources/integrations and user roles within your business and what the requirements actually are for the new CDP system you will be assembling.



STEP 2

Data Ingest

The first hands-on phase, intended to setup and configure the data sources, and define the keys. This can be very simple if the vendor supports all your data sources right away, or very difficult if custom integration development is involved, which we always recommend avoiding wherever possible.



STEP 3

Data Mapping

This phase involves identifying the relationships between the different tables, based on the keys you have previously described to the system. Expect there to be a lot of back and forward to the previous phase as additional requirements and dependencies become clear.



STEP 4

Identity Resolution

Once all the data has been defined, mapped and imported, it is time to look at defining your rules to manage and dedupe the data. Remember, it comes from diverse sources, may not all be normalised (one record per customer), and almost certainly includes some crossover, perhaps some of it contradictory. What do you do when two data sources contain the same customer but with different field information – which one should you give preference?



STEP 5

Define Destination Channels


Once you are happy that you have a draft CDP, consuming data from diverse sources, following the defined rules, then it is time to configure connections to recipient/consumer systems, where you will be sending your newly created and synchronised views of the customer.



STEP 6

(Optional) Segmentation Design

Some of the more advanced CDPs actually provide a capability to develop segmentation ready for syndication to the downstream systems, which can be extremely useful if you have multiple destination systems that could consume the same target segments, saving you from unnecessary duplication of effort, and possible inconsistencies of interpretation.



STEP 7

Reporting & Analytics

The final phase is to configure your reporting requirements to provide correct levels of Management and Quality reporting in order to ensure that all stakeholders have a clear, and real-time view of the health and accuracy of the CDP.

To find out more about how a CDP could revolutionise your business, contact Purple Square CX on

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