

**Acquia**  
EXPERIENCE DIGITAL FREEDOM

# ***CUSTOMER DATA PLATFORM (CDP) IMPLEMENTATION GUIDE***

The Fast Track to Measurable Marketing Impact



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# INTRODUCTION

**Marketers know that the best customer experiences today are data-driven. To gain a comprehensive view of what your customers want and need it's essential to pull together the right data from sources across the entire enterprise.**

A customer data platform (CDP) can enable you to do just that. The question is: how can you best plan for a smooth and streamlined CDP implementation project?

If you're considering a customer data platform, it's likely that you're already aware of the value that a 360-degree view of your customers can bring.

It'll enable you to generate rich, actionable insights, drive engagement and, ultimately, make smarter marketing and business decisions.

Like any large-scale software implementation project, getting up and running with a new CDP can be challenging. You'll need to navigate technological transformation as well as process change, and you'll need to bring together internal stakeholders who may not have collaborated before. But the benefits will make it more than worthwhile.

# ***ALIGN TEAMS ON THE PURPOSE OF YOUR CDP***



A CDP is a marketer-controlled system capable of unifying data from a broad array of sources in real time to create a single view of the customer. CDPs also orchestrate data for action across channels, and provide analytical insights that are easy for non-technical people to understand. This is what makes personalized customer experiences possible.

Once you've built a complete, unique picture of each of your customers, you can use the information to:

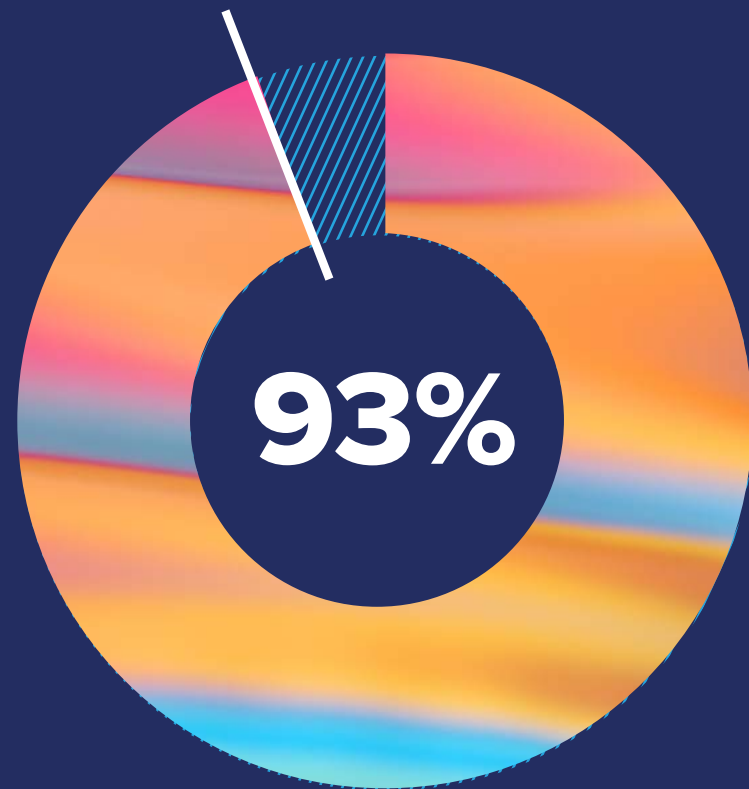
- /// **Deliver relevant and consistent messages across all channels**
- /// **Intelligently predict which promotions and incentives your customers are most likely to respond to**

- /// **Surface previously hidden relationships between online and offline experiences**
- /// **Optimize customer experience through more effective personalization**
- /// **Drive customer retention and loyalty to increase customer lifetime value**

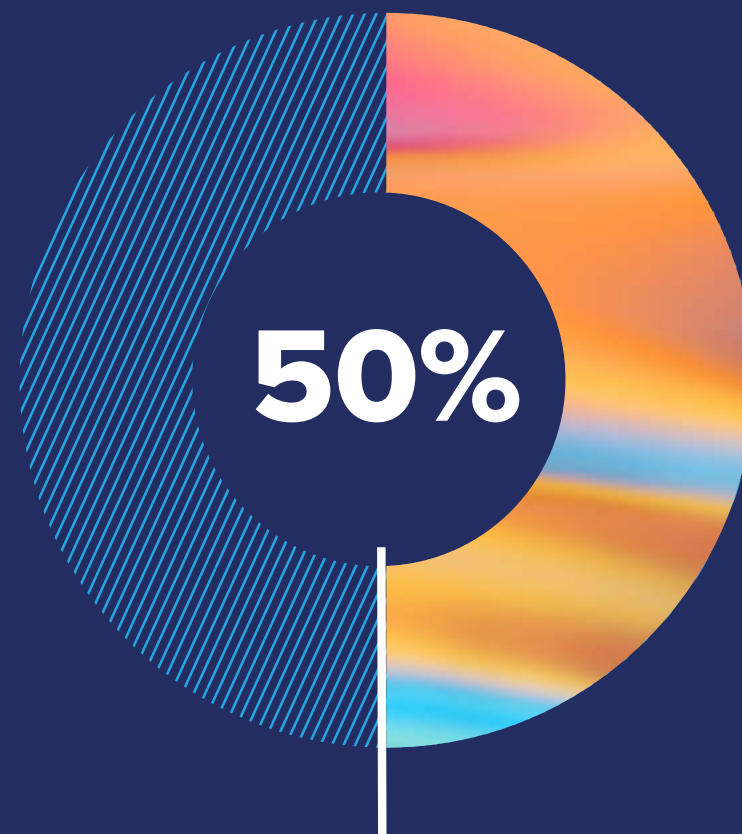
In this e-book, we'll describe the three stages in a CDP implementation project – **strategy, implementation and enablement** – and talk about how companies can get ahead of potential roadblocks to expedite time-to-value. We'll also provide expert tips on planning and managing your CDP implementation.



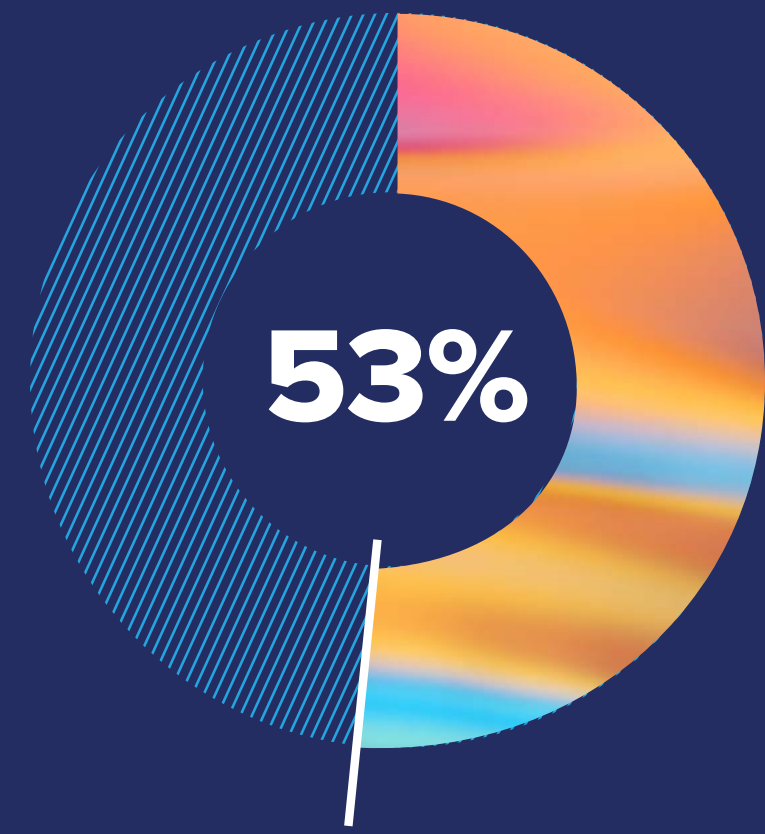
# MARKETERS WHO WANT THEIR BRAND TO SUCCEED ARE TAKING ACTION NOW



of marketers say that gathering first-party data is more important to their organization than it was two years ago.



of global marketers report that their organization has adopted a CDP within the last 18 months.



of marketers now rely on a CDP that leverages machine learning for intelligent analytic insights.

[“Deliver A Modern Digital CX: A Guide for Marketing Innovators, \(Customer Experience Trends Report, Global Edition\),” Acquia, 2021](#)

# ***HOW TO PREPARE FOR YOUR CDP IMPLEMENTATION***

Bringing a CDP into your organization is a significant digital transformation project. It's typical for the implementation process to take between three and nine months, depending on your goals and the state of your data.

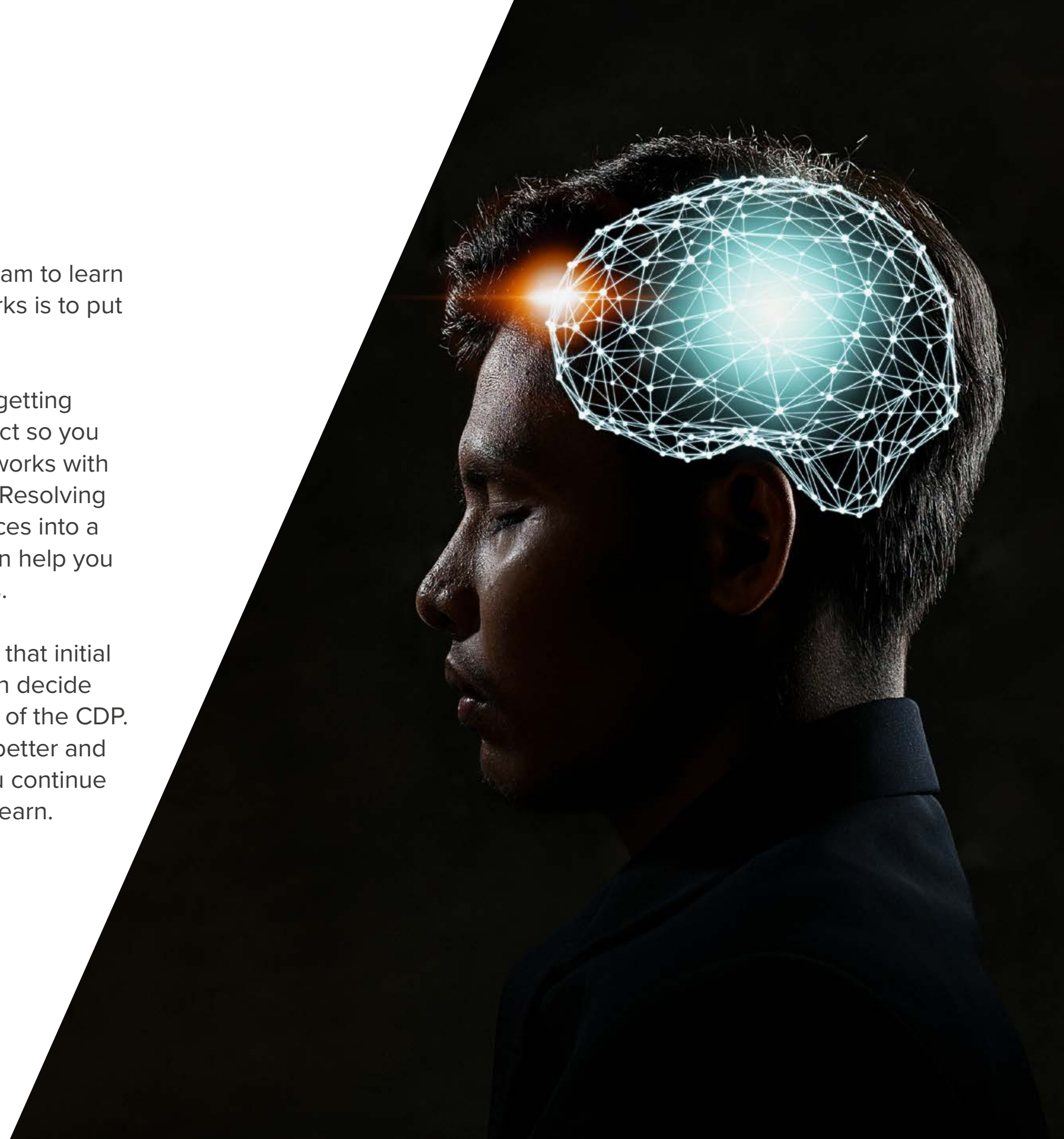
However, you can substantially reduce the amount of time your project takes by conducting a thorough discovery process beforehand. So, as you begin, make sure you understand where your data lives and how you're planning to use it.

**It's a good idea to adopt an agile mindset when embarking upon this project.**

The best way for your team to learn how this technology works is to put their hands on it.

With a CDP, this means getting your data into the product so you can actually see how it works with your digital information. Resolving records from a few sources into a single customer view can help you create better campaigns.

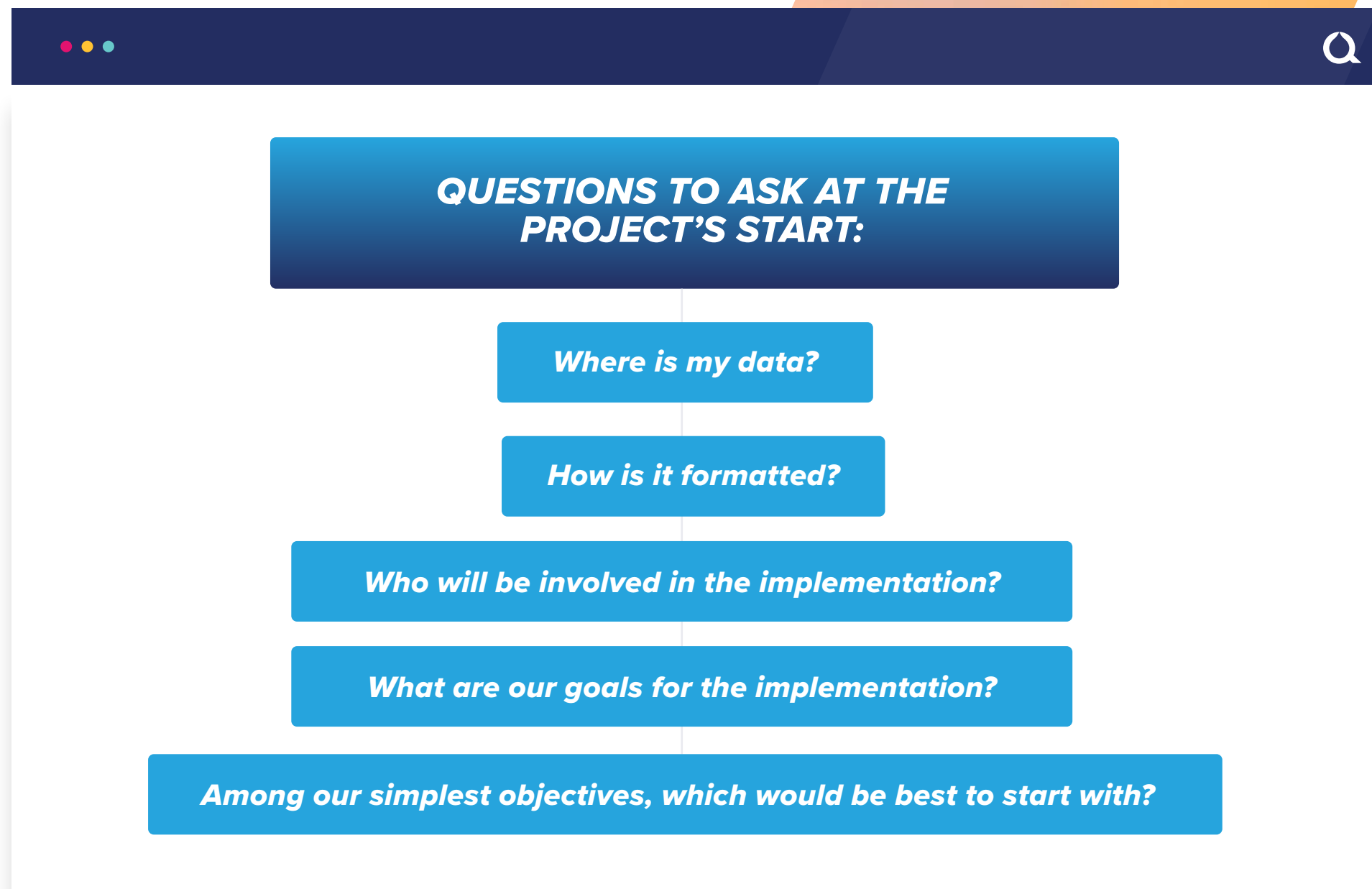
Based on the returns on that initial investment, you can then decide how to expand your use of the CDP. You'll be able to create better and better campaigns as you continue to build upon what you learn.





Unlike other marketing technologies, a CDP is expressly designed to ingest data from across an entire business. This means that even though the IT team won't be the solution's primary user, it still has a role to play in the implementation.

Many organizations adopt **cross-functional teams** to work on CDP implementation projects so that they can combine resources and talent from across the organization. A CDP implementation project serves as an excellent opportunity for IT to collaborate with marketing to deliver better and more customer-centric experiences.



# ***STAGE ONE: STRATEGY***



To achieve your desired outcome from this project, you need to have the right plan in place from the start. With a complete understanding of where your data resides, what your strategic vision is and how your technology roadmap looks, you can begin to see how these things will all fit together.

Most organizations taking on a project of this magnitude are well-advised to work with an experienced service provider who can guide them through the process. So, it's likely you'll want to begin with a well-defined discovery phase together. Your actions here should be guided, first and foremost, by the business goals that drove your choice of this technology.

## **DATA STRATEGY FOR YOUR CDP IMPLEMENTATION**

***Establish key business goals you want to achieve***

***Determine which data sources to bring in first***

***Aim to better understand your existing data***

***Partner with other internal groups to identify any additional data sources***

***Reconcile any data quality and/or consistency issues***

***Ensure that your data is accessible and can easily be extracted from its systems of origin***

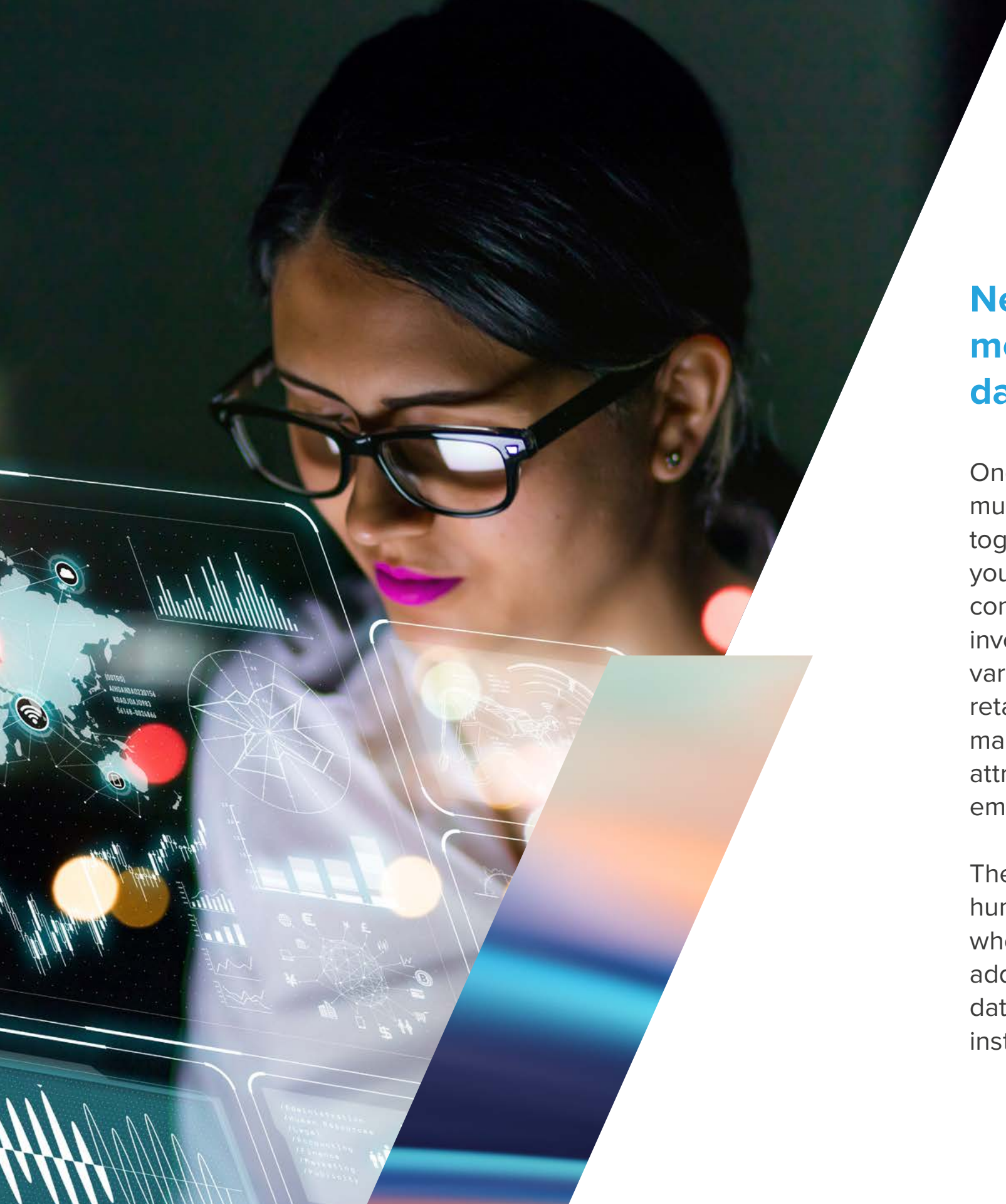
What value will a CDP bring to your organization? Are you looking for better insights into your customers so you can improve how you market to them through more personalized content? Do you want better control over privacy? Are you trying to better time sales and promotions? The answers to these questions can help you shape your plan and determine which data sources to bring in first.

After you've made these choices, you can dig into data discovery. The more familiar you are with your own data, the less time this phase will require.

The first stage in data discovery involves investigating where your most relevant and valuable data lives. This might sound surprising, but often the most valuable data for marketing purposes actually lives outside the marketing technology stack.

For instance, it's common for technology products' user data to reside within those products rather than in a customer relationship management (CRM) tool. This is just one of many upsides to having marketing and IT groups work together on a CDP implementation project. They just might discover data sources that the other team wasn't fully aware of.





**Next you'll want to consider data quality. Among the most important questions to ask near the outset of any data unification project is: What is the state of our data?**

Once you begin bringing data from multiple different source systems together, it's all but inevitable that you'll run into some data quality and consistency issues. Some of these may involve idiosyncrasies inherent to the various source systems themselves: a retail point-of-sale (POS) system may maintain records with different fields and attributes than those in a CRM tool or email marketing software.

There may also be challenges due to human error. A retail store employee who's been incentivized to collect email addresses may have entered dummy data to increase their numbers, for instance.

Systems that don't have APIs that allow for seamless data extraction can also pose challenges.

In any case, making sure that your data is accessible and can easily be extracted from its systems of origin puts you in a better position to begin your implementation. These two factors are what slow down CDP implementation projects the most often.

# ***STAGE TWO: IMPLEMENTATION***



The implementation phase is the central part of the project — it's where the CDP is prepared to begin mining your customer data for real insights. Though you've probably undertaken a data discovery process during the strategy phase, you should be able to start mapping your data in greater depth now.

During the **data mapping process**, the team that knows the data best will work to map its fields into something that's standard across all sources.

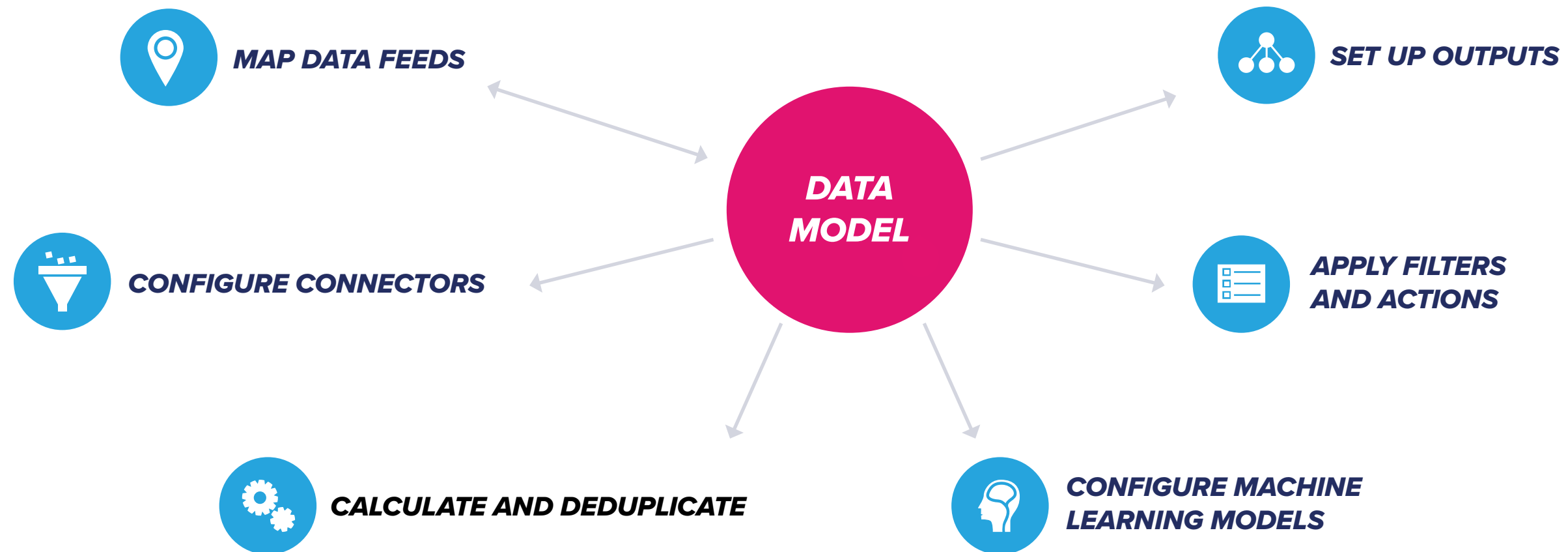
While the data will come from different sources in different ways, not all of it must be mapped or used in the CDP. What's most important is to identify the data columns — for things like total revenue, lifetime transaction value or average transaction value — that will enable you to investigate the hypotheses you're planning to start with, and generate the insights you're seeking.

**PRO TIP:** Look for a CDP that includes standard data models that you can configure to meet your organization's individual needs. If you need to build out your own data model from scratch, implementation will take much longer.



# DATA IMPLEMENTATION

Map source systems into CDP, set up data and business intelligence (BI) transformations, analyze, and configure data model.





Next, begin **configuring connectors**.

This involves writing the rules and logic to apply when multiple different and possibly conflicting sets of data come together. Let's say you have three customer records: one from your website, one from the POS system, and one from your social channels.

All three records have the same last name and address, but one's called "Joseph," one's called "Joe," and one's called "J." Are these all the same person? If so, which first name should you use? What level of fidelity to the original data sets should you maintain?

<b>IDENTITY RESOLUTION IN ACTION</b>		
<b>Record from website</b>	<b>Record from POS system</b>	<b>Record from Facebook</b>
Joseph Smith	Joe Smith	J. Smith
[ ]	3 Main St	[ ]
[ ]	[ ]	Springfield, MA 01020
jsmith@protonmail.com	[ ]	[ ]

<b>Reconciled record</b>
Joseph Smith
3 Main St
Springfield, MA 01020
jsmith@protonmail.com

This process of identity resolution is where the CDP enables you to determine who your customers actually are — and how many of them you have. Of course, data deduplication will need to happen over and over again as users generate new inputs for the system.

Once you've set up your connectors, you're ready to think about reporting. During the **calculate** phase, you'll figure out which standard and custom reports you want your CDP solution to generate for your team. This is where you can begin to get creative. Transparent reporting capabilities will also build your confidence in the solution: if you understand what's happening to your data, it'll be easier for you to trust the insights your CDP gives you.

If you want to take your CDP's capabilities to the next level, you can **configure machine learning models**.

With the right data, machine learning can provide you with exciting, futuristic insights. Machine learning can help you identify:

- ▮ **Predictions.** It can tell you which customers are most likely to buy, which are most likely to pay full price, and which are most likely to churn.
- ▮ **Personas and segments.** It can find the products that are most likely to be bought together or help you find lookalike groups on Facebook or other social platforms.
- ▮ **Personalization.** It can help you determine optimal send times and show you opportunities for upselling, cross-selling or recommending the next best product.

# ***STAGE THREE: ENABLEMENT***





# ***DATA ENABLEMENT***

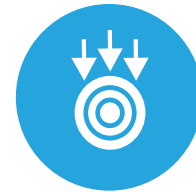
Intelligence, segmentation, cohorts, and summaries for decision-making and campaigns.



***Change management***



***Build reports and dashboards***



***Campaigns***



***Website personalization***



***Outbound marketing and digital advertising***



***Direct mail***



***Content creation***



***Refine and iterate***

## Here's where the rubber meets the road. During the enablement phase, your CDP implementation should begin to deliver real-world value.

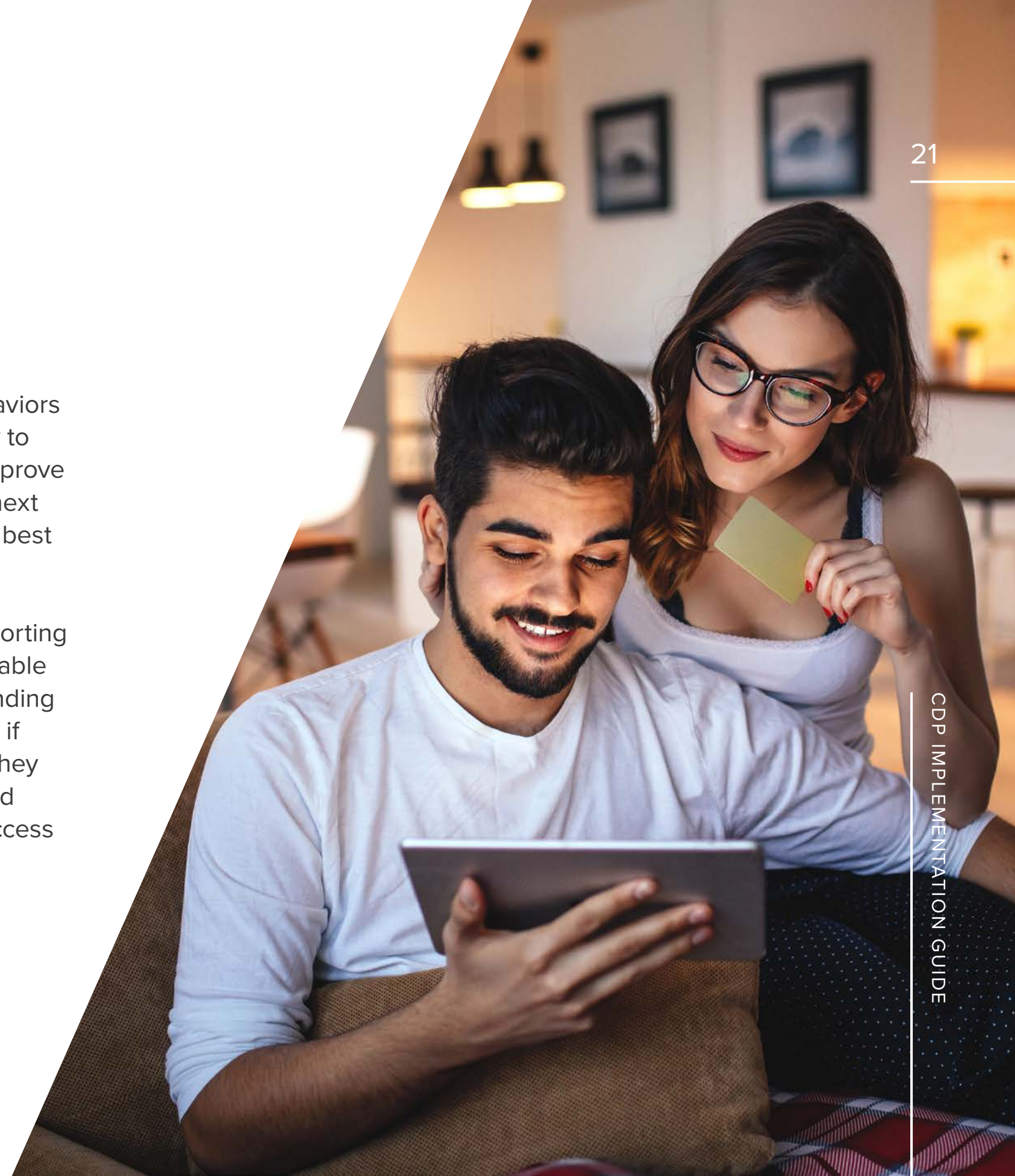
When your CDP goes to production, you'll continue to check the data and validate results, but you'll also be ready to begin testing hypotheses.

If for instance, the CDP makes a prediction that a particular group is likely to churn, and you send them a special offer code, what happens? If you host a special event in-store, will it drive visits to your website at a later date? How well are your multichannel campaigns performing?

Because it's able to recognize patterns in large volumes of data, your CDP will be able to tell you who is more inclined to engage, buy and convert. It'll also be able to identify which product or

category purchases, customer behaviors or seasonal patterns are most likely to occur together. And it'll help you improve personalization by suggesting the next best product, next best action, and best send times for promotional emails.

If your CDP has comprehensive reporting and analytics capabilities, you'll be able to use it to gain a deeper understanding of customer behavior patterns. And if you have data scientists in-house, they should be able to use their preferred business intelligence (BI) tools to access and share data from the CDP.





***EXPERT TIPS ON  
SPEEDING TIME-TO-  
VALUE WITH A CDP***

**/ Start as small as you can and build from there.** There's no question that a CDP is a powerful solution that has the power to drive profitability and business growth. However tempting it may be to maximize its benefits as quickly as you can, adding in every possible data source at the very beginning will increase the project's cost and complexity. Instead, take an iterative approach by starting with the bare minimum that will enable you to demonstrate value, and strive for incrementally better campaigns with incrementally better results.

**/ Think like a scientist.** Leverage the power of the scientific method to create and test hypotheses that will lead to evidence-based insights. Start out by asking yourself what you can prove by using this tool, and what your results can show.

Then, be laser-focused on investigating those hypotheses, which you can build upon in the future.

**/ Don't be afraid to bring in help.** To take just one example, many retailers who had never before marketed direct-to-consumer (DTC) dove into this area headfirst during the pandemic. In order to be successful, though, it's important to have experience. If your CDP reveals new avenues that are worthwhile for you to explore, you don't need to reinvent the wheel. Whether it's with strategy, campaign execution or running the rest of your ecosystem, you'll find many prospective partners with the right expertise and ability to contribute. You don't need to go it alone.

**CASE STUDY**

# HOW J.CREW USED ACQUIA CDP TO RECALIBRATE THEIR TRAJECTORY

**Founded in 1983, J.Crew Group is an internationally recognized omnichannel retailer of women's, men's and children's apparel, shoes, and accessories.**

Leadership wanted the ability to quickly take action on customer insights — both in-store and online — but its previous marketing service provider (MSP) wasn't able to deliver. This prevented J.Crew from being as agile as possible and hindered the company's ability to maximize their customers' lifetime value across brands.

As the company continued to grow and evolve, J.Crew faced several specific challenges with their MSP:

- // Synthesizing customer and transactional data from physical stores and online was a cumbersome process that impacted J.Crew's ability to nimbly execute targeted marketing campaigns.
- // Unactionable and messy data prevented J.Crew from capturing customer shopping insights, accurately calculating customer lifetime value, and delivering hyper-personalized customer experiences.

- // This meant that the most essential data remained siloed, and the customer service team lacked valuable insights into customer's journey, purchase history, and lifetime value.
- // The company couldn't tailor discounts based on actual customer behavior, negatively impacting margins.

J.CREW



After considering numerous solutions, including development of a homegrown solution, J.Crew ultimately chose Acquia CDP. Since standardizing on Acquia CDP, J.Crew has realized many benefits, including:

- Improved data freshness that enables J.Crew to quickly and effectively respond to their customers' behaviors.
- Enhanced data quality, which resolved issues introduced by their MSP, including reduplication issues that led to erroneous customer lifecycle classification, and incorrect marketing action.
- Improved data accessibility that allows all J.Crew analysts query access to all the Acquia processed/deduped/cleaned/connected/daily-refreshed data.

- Empowered data democratization that has made J.Crew's marketing team infinitely agile and self-reliant.

Using customer insights and machine learning models from Acquia CDP has led to measurable performance improvements with J.Crew's marketing campaigns, including one email campaign targeting a cashmere audience segment that resulted in double-digit lifts over the "business-as-usual" audience in average order value (AOV), conversion rates, open rates, and click rates.



***SUMMARY AND TAKEAWAYS***

***A CDP CAN HAVE A  
TRANSFORMATIVE IMPACT  
ON YOUR MARKETING –  
AND YOUR BUSINESS***

It's clear that brands in retail and beyond will need to expand their digital capabilities to succeed in a digital-first world. Organizations need to create experiences that are tailored to every visitor, prospect or customer. Creating these personalized experiences will require an understanding of behavior, customer data – and the ability to activate that data.

One of the most meaningful tools available today for personalized experiences is a customer data platform. But not all CDPs are created equal. Look for a solution that gives you:

- /// A single, unified view of your customers based on all relevant data sources, both online and off

- /// Machine learning and data modeling capabilities that will reveal new and actionable insights about your customers
- /// Robust reporting capabilities
- /// A way to activate and operationalize across all channels
- /// Comprehensive data quality measures, identity resolution, and omnichannel customer data profile enhancement



# UNLOCK AND UNIFY YOUR CUSTOMER DATA THROUGH ACQUIA CDP

To see how Acquia CDP can help your organization generate rich insights that drive engagement – and much more – register for our next demo webinar today.

**REGISTER NOW**



# Acquia

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## **ABOUT ACQUIA**

Acquia empowers the world's most ambitious brands to create digital customer experiences that matter. With open source Drupal at its core, the Acquia Digital Experience Platform (DXP) enables marketers, developers and IT operations teams at thousands of global organizations to rapidly compose and deploy digital products and services that engage customers, enhance conversions and help businesses stand out.

