

# DataEM

DATA Enriched Marketing

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## Periodic Table of Customer Data Platforms

Extract, Unify, Expose Data
  Real Time Interactions
  Predictive / AI

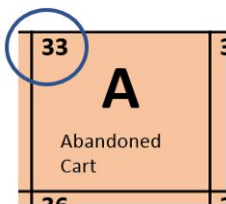
Analyze Data
  Outbound Campaigns
  Omni Channel

1 <b>G</b> Golden Record	2 <b>D</b> Data Quality											41 <b>Ba</b> Behavior Analysis	42 <b>J</b> Journey Analytics
3 <b>Oi</b> Online Instore Combination	4 <b>P</b> Privacy - GDPR Compliance	11 <b>Ch</b> Churn Prediction	12 <b>V</b> Value Prediction	13 <b>Li</b> Loyalty Incentives	22 <b>B</b> Behavior Real Time Profiling	23 <b>C</b> Content In Real Time	32 <b>Sm</b> Social Media Audiences	33 <b>A</b> Abandoned Cart	34 <b>Dy</b> Dynamic Email List Creation	43 <b>Hv</b> High Value Customers	44 <b>Ca</b> Campaign Attribution		
5 <b>Ob</b> Onboarding External IDs	6 <b>Le</b> Lead To Account Match	14 <b>Ps</b> Prospect Selection	15 <b>Bo</b> Best Offer Selection	16 <b>Et</b> Engage Time Optimization	24 <b>Os</b> Real Time Offer Selection	25 <b>Dc</b> Dynamic Cross Sell Upsell	35 <b>Fe</b> Feature Notifications	36 <b>Pm</b> Personalized Messages	37 <b>Re</b> Reactivation Campaigns	45 <b>Bc</b> Best Customer Analysis	46 <b>Us</b> Underserved Segments		
7 <b>Ed</b> Enrichment Data Append	8 <b>Tg</b> Less Tag Mgmt Mapping	17 <b>Lm</b> Lookalike Models	18 <b>Tp</b> Topic Interest Prediction	19 <b>Id</b> Intent Data	26 <b>Ip</b> Individual Profiles	28 <b>Cp</b> Channel Preference	38 <b>Tr</b> Trigger Messages	39 <b>Dm</b> DMP Interactions	47 <b>Kp</b> KPI Reporting	48 <b>Eb</b> Events Based Geomapping	49 <b>Ls</b> Life Stage Assignment		
9 <b>Oc</b> Online CRM Combination	10 <b>Mg</b> Merger Before After Compare	20 <b>Un</b> Unsubscribe Prediction	21 <b>Rp</b> Repurchase Prediction	27 <b>Lb</b> Location Based Personalization	29 <b>Cs</b> Preemptive CS Support	30 <b>Rt</b> Retention Campaigns	31 <b>Cc</b> Cross-Channel Campaigns	40 <b>Pb</b> Previous Buyer Exclusions	50 <b>Sd</b> Segment Discovery	51 <b>Sa</b> Segment Assignment	52 <b>Rs</b> Run Stream Tests		

Use Case definitions and benefits, visit [Bit.ly/CDPUseCases](http://Bit.ly/CDPUseCases)

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The following definitions relate to the each of the elements in the CDP (Customer Data Platform) Periodic Table. Each of the elements in the CDP Periodic Table correspond to a typical use for a CDP. In fact, the CDP elements are actual Use Case briefs citing functionality.



ID	Periodic Symbol and Name	Description	Benefits
33	<b>A</b> Abandon Cart	Send messages to customers who abandon shopping carts and stop sending messages when no longer relevant.	More effective campaigns based on acting more quickly, excluding inappropriate customers, sending more appropriate offers, and removing customers more quickly when appropriate.

The elements in the table are color coded by generalized requirements and each element is numbered, relating to the definition and benefits described below. In each of the section headers, there is a button with a link back to the CDP Periodic Table.

**EXTRACT, UNIFY, EXPOSE DATA**

ID	Periodic Symbol and Name		Description	Benefits
1	<b>G</b>	Golden Record	Identify more accurate available information for each customer attribute and share with other systems.	Most accurate data used for all purposes; customer information is presented consistently across all interactions; changes are quickly disseminated.
2	<b>D</b>	Data Quality	Manage and improve quality of ingested customer data.	More accurate customer profiles improve all downstream applications; helps to improve quality in source systems.
3	<b>Oi</b>	Online Instore Combination	Link online and offline data relating to same customer.	Profiles are more complete; can measure impact of cross channel promotions.
4	<b>P</b>	Privacy - GDPR / Compliance	Use CDP to show personal data to customers, to store consent records, and as connection to source systems.	Faster, cheaper response to customer requests; central repository for consent; easily identify source systems when update is needed.
5	<b>Ob</b>	Onboarding External IDs	Append external identifiers to existing customer records.	New identifiers allow more accurate matching; gain ability to reach consumers in multiple channels.
6	<b>Le</b>	Lead to Account Match	Associate individuals with businesses in B2B data.	More accurate connection of individuals to business; more complete view of aggregated business level data.
7	<b>Ed</b>	Enrichment Data Append	Append external attribute and behavioral data to existing customer records.	Profiles are more accurate, contain new data types, and have fewer missing values. This allows more robust analysis and segmentation.
8	<b>Tg</b>	Less Tag Mgmt. Mapping	Use CDP pixel on Web site to capture user behavior.	Replace one or more Web site tag solutions; get consistent data from multiple Web sites
9	<b>Oc</b>	Online CRM combination	Link online and offline data relating to same customer.	Profiles are more complete; can measure impact of cross channel promotions.
10	<b>Mg</b>	Merger Before After Compare	Link customer profiles from separate systems as before or after merger.	Identify shared customers and create more complete profiles more quickly.

## REAL TIME INTERACTIONS

ID	Periodic Symbol and Name		Description	Benefits
11	<b>Ch</b>	Churn Prediction	Estimate likelihood of customer churn using model based on CDP data.	More accurate models based on more complete, current data.
12	<b>V</b>	Customer Value	Estimate future value of customer using model based on CDP data.	More accurate models based on more complete, current data.
13	<b>Li</b>	Loyalty Incentive	Select loyalty incentive using model based on CDP data.	More accurate models based on more complete, current data.

14	<b>Ps</b>	Prospect Selection	Select best prospects (among existing leads) using model based on CDP data.	More accurate models based on more complete, current data.
15	<b>Bo</b>	Best Offer Selection	Select best offer using model based on CDP data.	More accurate models based on more complete, current data.
16	<b>Et</b>	Engage Time Optimization	Send emails or other outbound messages at optimal time for each customer.	More accurate models based on more complete, current data.
17	<b>Lm</b>	Lookalike Models	Select best prospects (on external lists) using model based on CDP data.	More accurate models based on more complete, current data, including profitability of existing customers.
18	<b>Tp</b>	Topic Interest Prediction	Estimate customer interest in different topics using model based on CDP data.	More accurate models based on more complete, current data.
19	<b>Id</b>	Intent Data	Add intent data from external sources to customer profiles in CDP.	More accurate targeting and alerts by adding intent data to customer profiles in CDP; easily share intent data with all other systems.
20	<b>Un</b>	Unsubscribe Prediction	Estimate likelihood of unsubscription using model based on CDP data.	More accurate models based on more complete, current data.
21	<b>Rp</b>	Repurchase Prediction	Estimate likelihood of repurchase using model based on CDP data.	More accurate models based on more complete, current data.

## OUTBOUND CAMPAIGNS

ID	Periodic Symbol and Name	Description	Benefits	
22	<b>B</b>	Behavior Real Time Profiling	Classify anonymous visitors in real time based on their behaviors.	More effective profiling based on ability to build predictions derived from history of previous visitors, as stored in CDP profiles.
23	<b>C</b>	Content In Real Time	Select content for known customers in real time based on their past data.	More effective content selection based on access to customer history stored in CDP.
24	<b>Os</b>	Real Time Offer Selection	Select offer for known customers in real time based on their past data.	More effective offer selection based on access to customer history stored in CDP.
25	<b>Dc</b>	Dynamic Cross Sell Upsell	Select best product for known customers in real time based on their past data.	More effective product selection based on access to customer history stored in CDP.
26	<b>Ip</b>	Individual Profiles	Present complete customer history to call center or sales agent during interactions.	Complete customer history immediately available to agent.
27	<b>Lb</b>	Location Based Personalization	Select best message in real time based on current customer location and past data.	More effective product selection based on access to customer history stored in CDP.

## REAL TIME INTERACTIONS

ID	Periodic Symbol and Name	Description	Benefits	
28	<b>Cp</b>	Channel Preference	Determine which channels work best for each customer.	Improve response, avoid wasted messages, avoid making customers annoyed.
29	<b>Cs</b>	Preemptive CS Support	Help customers who need assistance before they request it.	Lower support costs, higher customer satisfaction and greater loyalty from superior customer experience.
30	<b>Rt</b>	Retention Campaigns	Send optimal treatments to retain existing customers.	Optimal profitability based on having complete data on individual customers and complete history on past customers for training the system.
31	<b>Cc</b>	Cross Channel Campaigns	Send optimal messages to customers across all channels.	Optimal profitability based on having complete data on individual customers and complete history on past customers for training the system.

## PREDICTIVE / AI

ID	Periodic Symbol and Name	Description	Benefits	
32	<b>Sm</b>	Social Media Audiences	Send audiences to social media ad vendors.	More effective advertising based on audiences built with richer data; better analysis of campaign results to allow future optimization.
33	<b>A</b>	Abandon Cart	Send messages to customers who abandon shopping carts and stop sending messages when no longer relevant.	More effective campaigns based on acting more quickly, excluding inappropriate customers, sending more appropriate offers, and removing customers more quickly when appropriate.
34	<b>Dy</b>	Dynamic Email List Creation	Select customers for email campaign	Easy list creation because all data is in preassembled profile; more accurate selection based on more accurate data.
35	<b>Fe</b>	Feature Notifications	Notify customers of new features that are relevant to them.	Less waste and customer annoyance by sending more relevant messages based on more complete data.
36	<b>Pm</b>	Personalized Messages	Provide customer level data to personalization system.	Select best message for each customer and include personal information within each message.
37	<b>Re</b>	Reactivation Campaigns	Send messages to customers who have stopped doing business or are at risk.	More effective campaigns based on richer data; can identify more customers to contact, select best message, and exclude customers who should not be contacted (because will never renew, will renew anyway, are unprofitable, etc.)
38	<b>Tr</b>	Trigger Messages	Send messages to customers based on specified actions or events.	More effective messages and higher customer satisfaction by sending more relevant messages.
39	<b>Dm</b>	DMP Interactions	Synchronize DMP and CDP data.	More effective advertising based on audiences built with richer data; better

				analysis of campaign results to allow future optimization.
40	<b>Pb</b>	Previous Buyer Exclusions	Remove previous buyers from campaigns for specific products.	Less waste and customer annoyance by sending more relevant messages based on more complete data.

ID	Periodic Symbol and Name	Description	Benefits	
41	<b>Ba</b>	Behavior Analysis	Track customer actions over time.	Understand customer behavior; find problems or opportunities; better predict behaviors.
42	<b>J</b>	Journey Analytics	Identify sequence of interactions associated with different tasks.	Assess impact of current interactions, find problems or opportunities.
43	<b>Hv</b>	High Value Customers	Identify individual customers who have returned high value	Create special programs for high value customers, e.g. special offers, rewards, recognition, referrals, advocacy, etc.
44	<b>Ca</b>	Campaign Attribution	Estimate the change in behavior caused by a marketing program.	Determine value of marketing programs to help guide marketing spend and understand customer behaviors.
45	<b>Bc</b>	Best Customer Profiles	Identify attributes common to best customers.	Identify high potential prospects (to acquire) and leads (on internal lists)
46	<b>Us</b>	Underserved Segments	Find customer segments that could be contacted more often with good results.	Gain additional value from existing customers.
47	<b>Kp</b>	KPI Reporting	Generate reports based on Key Performance Indicators.	Easier to create reports from unified database; can build on standard variables, etc. maintained in CDP.
48	<b>Eb</b>	Events Based Geomapping	Use customer data to select location of field events.	Gain better value from events by basing location on potential customer value rather than simple customer counts.
49	<b>Ls</b>	Life Stage Assignment	Tag customers who belong to previously defined life stages	Easily apply life stage-based treatments to individual customers; run programs triggered by life stage change.
50	<b>Sd</b>	Segment Discovery	Identify sets of customers that can be usefully treated as segments.	Find opportunities to improve results through better targeted customer treatments.
51	<b>Sa</b>	Segment Assignment	Tag customers who belong to previously defined segments.	Easily apply segment-based treatments to individual customers; run programs triggered by segment change.
52	<b>Rs</b>	Run Stream Tests	Compare behaviors of customers in different long running marketing programs	Determine impact of test programs to find best customer treatments.

Use Cases courtesy of the CDP Institute, [www.CDPInstitute.org](http://www.CDPInstitute.org) . The CDP Institute offers a FREE CDP vendor match and RFP generator tool accessible at [www.Bitly.com/CDPInstitute](http://www.Bitly.com/CDPInstitute)