



Customer Data Platforms

A personalisation leap forward





Customer data platforms (CDP) represent a big breakthrough in CX optimisation

If you're a smart marketer in any given industry, you already understand the value of personalisation and CX optimisation. They feed the exceptional buyer experiences you need to win today – to delight audiences and ultimately keep customers coming back for more.

And it's not just marketing anymore: personalising messages, touchpoints and delivery across the entire customer journey builds trust in your brand. It creates moments of delight for customers, and upselling opportunities that customers welcome because they enhance their experience.

The outputs personalising CX are as clear as they are compelling: increased loyalty, reduced churn, higher customer lifetime value, and long-term revenue.

But we're not going to soft-pedal how hard it is to optimise the customer experience. It requires you to amass,

clean, and normalise a mountain of data and activate it in real-time on a 1:1 basis – for hundreds to millions of customers. That requires tight coordination across areas that are functionally related but often practically disparate, like:

- Customer databases
- Call centres
- Brand strategy and campaign execution
- Marketing automation
- Content management
- Real-time interaction management
- Supply chain
- IoT

Once these systems (and the data within them) are integrated, it might be possible to create manual insights, but they won't scale and get activated across each touchpoint. Only AI can support this kind of scale, helping automate analytics, targeting, and interactions.

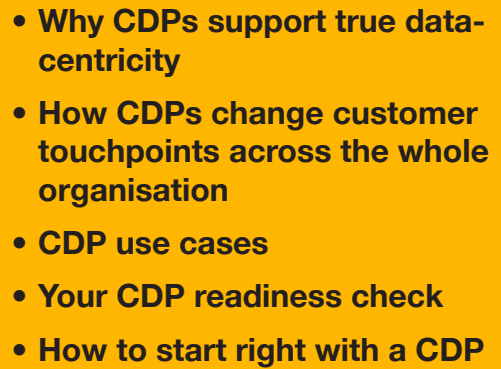


So what's the way forward?

Customer data platforms (CDPs) provide the infrastructure to create a unified view of every customer. This is the missing piece that prevents businesses from realising the promises of personalisation. And once you crack that, you have a foundation to unlock 1:1 experiences and relationships at every touchpoint – not just in marketing, but across sales, service, and your wider operations such as onboarding and support.

Because the truth is personalisation isn't about the move from mass-marketing to individual conversations. It's about creating a unique and valuable experience for every customer, underpinned by a single, comprehensive source of truth.

This article explores how **customer data platforms (CDPs)** can unlock that potential for brands:

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- **Why CDPs support true data-centricity**
 - **How CDPs change customer touchpoints across the whole organisation**
 - **CDP use cases**
 - **Your CDP readiness check**
 - **How to start right with a CDP**

Ready? Let's go.





Keep the promise of data-driven marketing – and extend it to CX


Marketing was the original proving ground for using data to tailor messages and other interactions. Using data to drive marketing decisions – and personalising it to fit specific customer needs – is a big departure from the traditional era, which was about sprinkling on some advertising magic and hoping for results.

Today, marketers have progressed, and they have all the tools they need to make better decisions, market at a 1:1 level, and prove ROI.

At least, in theory.

In truth, most marketing organisations still struggle to amass, centralise, and make sense of their own data – much less integrate data from across the organisation. For instance, think about the insights marketing could gain from how customers use loyalty programs or the conversations they have with the customer service.

That's partly a scale and dispersion issue. Every digital and non-digital experience across the customer lifecycle generates data, and it's spread across a multitude of locations: websites to email campaigns to direct mail responses to point-of-sale information and beyond.



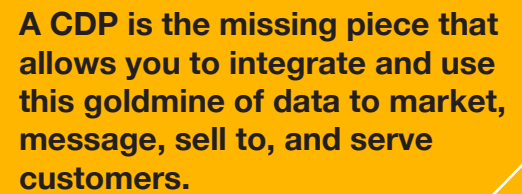
The intent might be a single view of every customer. The reality is rampant siloisation.

Just think about all the ways your business receives signals about customer preferences. Things like:

- Inferred buyer interests from point-of-sale behaviours
- Browsing habits across your site
- Site purchases and cart abandonments
- Content consumption
- Inbound search terms
- Customer service interactions
- Loyalty programs
- Conversations with sales staff

Even these few examples paint a picture of how connected (yet dispersed) this information is. The intersection of any two of those categories could yield valuable insights – but it's very hard to bring them together with the speed and accuracy needed to make decisions that improve the customer experience.

In addition, each customer record can benefit from your knowledge of other customers. Using lookalike customers,

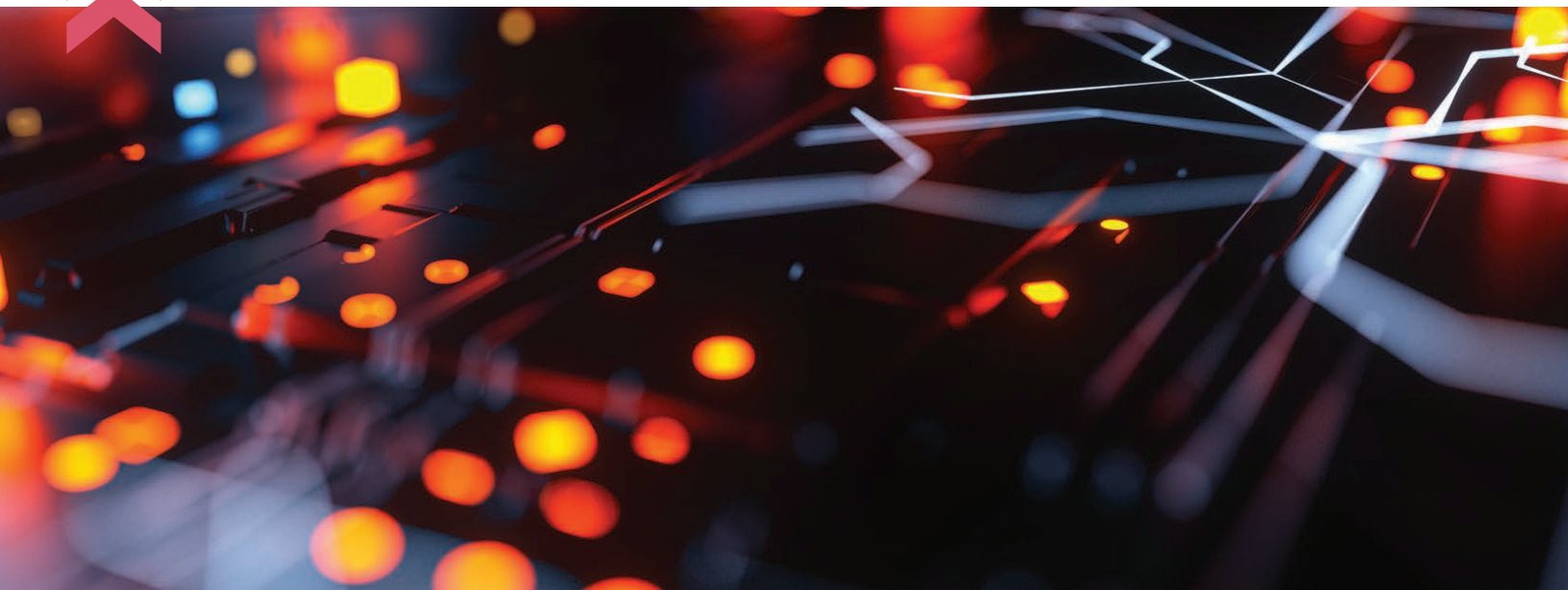


A CDP is the missing piece that allows you to integrate and use this goldmine of data to market, message, sell to, and serve customers.

you can predict whether a new customer is likely to become one of your best customers, or identify customers who might churn and craft win-back messages to help retain them.

You can also segment and interpret target customer bases as a collective to identify trends and likely interests, and then refine customer journeys using this insight.

But what about the broader customer experience? CDPs can support more personalised experiences and use cases across your sales, service, delivery, and analytics operations.





What is a customer data platform?

A customer data platform (CDP) is a single point of reference for the data you have about each customer. It contains comprehensive data points and applies intelligence to connect the dots on that data.

Crucially, a CDP isn't just a receptacle for that raw data. It takes many steps to convert data into action across different customer platforms.

But first it's important to understand the data hygiene needed. It's not just a matter of unifying customer data across

dispersed sources, but **cleaning, verifying, organising, optimising, and securing** it across different applications. Standard customer management systems don't do that.

To leverage AI in service of personalised customer experiences everywhere, you need an intelligent customer data platform that can aggregate data from numerous sources and process it to standardise quality **without** losing the essential context that makes it valuable at the individual level.

Here's how a CDP can help with that:



Customer resolution

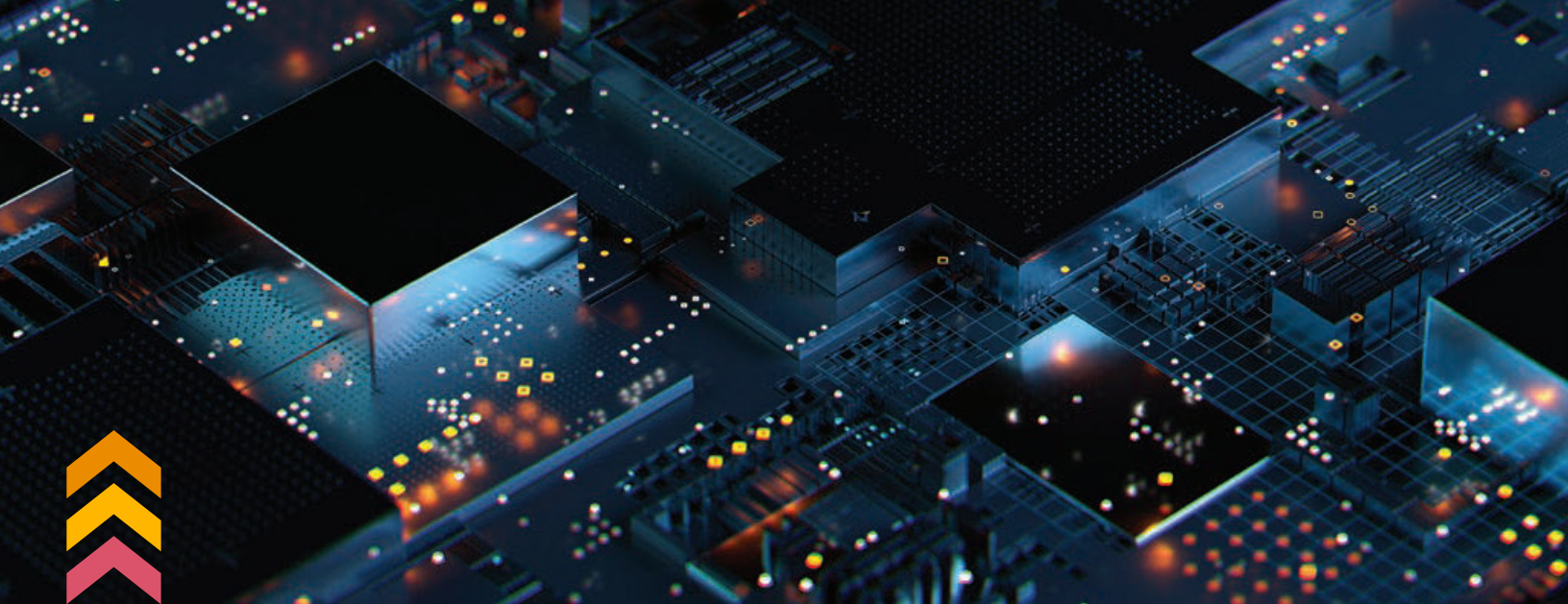
Getting an accurate view of a customer isn't always easy. They're interacting with you via multiple channels, often with small variations in their names and other data. And that data isn't just in your CRM: it's also coming from your martech, customer service software, and ecommerce engines. These typically aren't designed to share customer data with each other.

Identity management

For the best view of a customer, you need to reconcile identities about known customers (like email and mobile numbers) with what we know about customers before they share their data, such as anonymous cookies and mobile device IDs. This helps you associate a customer interaction that started with an email campaign and continued on your website.

Data activation

Real-time personalised experiences are impossible to deliver when your data takes hours or weeks to update. A CDP integrates with each platform (like email send engines, demand-side platforms and content management systems) to allow real-time updating. A true enterprise solution should encompass both insight – what your data means – and link to your systems of engagement for activation across channels.



Benefits summary: Why you may need a CDP

A CDP has benefits beyond being able to personalise every interaction:



Build a trust-based first-party data asset

Track consent preferences and stay compliant with privacy laws, while still capturing the data buyers volunteer and signals you gather in other ways.



Supercharge your analytics

Make better decisions by understanding your customers at every moment. Determine next best actions with AI-powered insights and analytics.



Create a single source of truth

Ingest and unify data from multiple sources, using AI to reconcile customer identities and create a more complete picture of each customer.



Adapt to the cookieless future

Engage audiences using unified first-party data from across the full customer relationship to make every moment connected and personalised for greater resonance and ROI.



Go beyond marketing

Make every engagement personalised and contextual. Give your marketing, sales, and services a human feel at every touchpoint.

Customer data platform use cases

Activation

The activation use cases are vast and encompass everything in your organisation that touches a customer – from acquisition to onboarding, upselling, and service. This is where a CDP shines. It lets you gain intelligence from robust customer profiles and use that insight across every touchpoint in your ecosystem, allowing you to interact with customers in a more consistent and compelling manner.

Some use cases include:

- Finding customer data look-alikes to make predictions about behaviour
- Improving performance marketing with more granular and more accurate data
- Powering your 1to1 marketing automation
- Providing higher-quality customer service, e.g., routing your best customers to more experienced service agents
- Optimising customer journeys
- Linking to and enhancing other functions like loyalty and commerce

Personalisation

You can personalise each interaction. As an example, a customer who browses a product on your website but leaves may just need a little push to commit to a purchase. With a CDP, you can tie everything you've learned about that customer and send a relevant offer via their preferred channel e.g. an and email or push notification.

Ad suppression

Ever buy something online only to see hundreds of ads for it over the next

month? That isn't a great use of your marketing budget. If you have a customer profile that unifies customer purchase data with your marketing system, you can suppress and cap ads once customers have purchased, saving your budget for the right customers. With a CDP, you can also ensure that where a customer has had an issue resolved with a service agent, that advertising is suppressed to them for a period of time so as not to antagonise them. This means you won't be spending all your money on diminishing returns.

Insights

You can get more insight when you tie website interaction data, such as a customer viewing a product or offering multiple times, with their purchase history from your ecommerce system. You can also use this to great effect when tying ecommerce data with in-store purchases and print coupon usage, as well as using it to combine aggregated analytics that identify big trends (like people bouncing out of a designed journey or converting at a high rate) with individual insights to create customer-centric insights.

Compliance

Stay compliant in the wake of ever-tighter privacy laws. Retain your high level of personalisation despite the death of the advertising cookie and ensure you've got a single view of consent and customer preferences to enforce your privacy policies.



Is your organisation ready for a CDP?

A CDP is a powerful tool but it's also an investment that may not be right for every organisation.

Assessing your CDP need

Companies that need to create a truly personal, targeted experience for customers likely need a CDP to unify data from every source, reconcile discrepancies and do it all in real time. It's simply the richest and most accurate view you can get of customers.

Many businesses default to buying a CDP solution but don't know how to get full value out of it. It's also important to understand with every tool that uses data: it's only as good as the data you put in. It's important to know what you want to get out of a CDP – and if your organisation is ready for it – before you invest in one.

Readiness self-check

- Do you know what you want to do with your data?
- Has your organisation committed to breaking down data silos between or even within teams?
- Do you need a more complete picture of your customers?
 - Are you struggling with duplicate records and partial profiles?
 - Has more manual marketing and targeting let you down in the past
 - Do you have use cases also in your sales and customer service?
- Are you capturing as much first-party data as possible?
- Do you have the right skills in house or the right partner to help you obtain, model, and prepare data?
- Are you equipped to use CDP insights effectively?

- Do you have a team in place with the know-how to set up personalised campaigns and experiences for customers?

Do you know which CDP solution to choose?

While all CDP solutions will have the same default capabilities, they're not all built alike. You need to consider not just the CDP solution itself but also whether it fits your existing ecosystem and what infrastructure it's built on. Important aspects to consider:

- AI and ML capabilities
- Ability to easily link with other systems
- Future-proof development practices
- Real-time syncing
- Whether it requires specialised skill sets to operate
- Whether it can activate data across all channels your customers use

Evaluating whether your team can operate your CDP

Some CDPs on the market are configured for highly technical users while some are designed with a citizen end user in mind. In the latter case, it's important to look for products with a highly declarative (modular) user interface and a user experience that helps your business personas accomplish their goals.

It's important to remember that if you have to write code to customise the platform, you might end up with a CDP only your engineering team can operate. Using a CDP with an intuitive, no-code interface opens it up to your marketers and your wider organisation.



Start right with your CDP

A customer data platform is an incredibly powerful tool, opening up extraordinary insight on an individual customer level - and the ability to act on it at scale.

Salesforce Genie is a hyperscale real-time data platform that powers the entire Salesforce Customer 360. With Genie, companies can turn data into customer magic, delivering seamless, highly personalised experiences across sales, service, marketing, and commerce that continuously adapt to changing customer information and needs in real time.

Salesforce's Customer Data Platform, powered by Salesforce Genie, allows marketers to connect real-time data across Salesforce and external data, create smarter segments, up to 30x faster, and engage customers with the right message at the right time across channels, using real-time data and insights.

But, like many high-investment technologies, it's easy to go wrong with any CDP. Taking it on without understanding how to use it is like buying a Ferrari but having it sit idle in your garage because no one at your house knows how to drive it.

PwC does know how to drive it (and teach your team to take over the wheel).

Transformation is much more than just implementing technology, so we take a business integrator approach and support you from strategy to execution. It means looking for early business cases, choosing the right technology vendors, crafting a strong data strategy, designing and implementing the solution.

But none of that matters if your team doesn't take advantage of the CDP capabilities once it's up and running. We build user adoption into the execution, and structure the operating model around continuous innovation and human centricity.

Some businesses may feel they are not ready to take on this endeavour and prefer a managed services approach, where we partner closely and manage the day-to-day operations to ensure customers get quick value and build their competence before we turn over the keys.

As a trusted Salesforce collaborator and multiple innovation award winner, we're ready to take you all the way from strategy to execution. We help you to turn your customer data into real-time customer magic.

Pondering what to do next? Take the next step with Salesforce and PwC. Get in touch.

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