

CDP Vendor Comparison

About this Document

Customer Data Platform systems vary greatly in the features they provide. This document helps buyers to identify systems whose features match their needs. It does this by showing which vendors provide features that support specific use cases. We assume buyers have identified their use cases in advance.

This report does not rank systems. More features isn't better. Unnecessary features add cost and complexity without creating value. If you use this report to rank systems, assign one point for each Yes on a feature you need and subtract one point for each Yes on features you don't need.

The definitions of each item are presented in the section following the table. "Yes" answers mean only that the system meets the minimum requirement in that definition. **This may not be adequate for a particular buyer's needs.** Buyers will need to explore the details of individual systems to find out.

The table is divided into two major sections.

- **Shared CDP Features** lists features present in all CDP systems. This section is included to provide a context and to help distinguish CDPs from other types of systems that buyers may be considering.
- **Distinguishing Features** lists features present in some CDPs that support specific use cases. This group is divided into Data Management, Analytics, and Engagement features. The expectation is the readers of this document will understand which of these features relate to their needs.

About the Data

Data in the table is based on information provided by each vendor. The CDP Institute has reviewed vendor answers, compared them with its own information about each system, and made adjustments as needed to ensure that answers are accurate and consistent. In future versions of this document, vendor headings may be linked to individual documents created by each vendor that provide additional explanations of the Yes/No table entries. These documents will not be reviewed for accuracy by the CDP Institute. The CDP Institute accepts no liability for information in this or related documents.

About the Vendors

Vendors listed in this and related documents are Sponsors of the CDP Institute.

About the CDP Institute

The Customer Data Platform Institute provides vendor-neutral information about issues, methods, and technologies for creating unified, persistent customer databases. Activities include publishing of educational materials, news about industry developments, creation of best practice guides, a directory of industry vendors, and consulting on related issues. For more information, visit www.cdpinstitute.org.



CDP Vendor Comparison

	AgilOne	Alterian	Amperity	Ascent360	BlueConic	Blueshift	BlueVenn	Celebrus	CrossEngage	Evergage	Fospha	Lattice Engines	Lemnisik	Lexar	Lytics	mParticle	NGData	Optimove	PearlTracks	PRDCT	Quaero	QuickPivot	RedEye	RedPoint	Segment	SessionM	Tealium	Treasure Data	ZyloTech	
Shared CDP Features																														
Retain original detail	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Persistent data	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Individual detail	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Vendor-neutral access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Manage PII	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Distinguishing Features																														
Data Management																														
Base Features																														
API/query access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Real-time access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Persistent ID	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Deterministic match	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Probabilistic match	Y	Y	Y	Y	N	N	N	N	Y	N	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	N	Y	N	N	N	N	N	N	Y
On-premises option	N	Y	N	N	N	N	Y	Y	N	N	Y	N	Y	N	N	Y	N	N	N	Y	N	N	Y	Y	Y	Y	Y	N	N	Y
Un/Semi-Structured																														
JSON load	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
Schema-free data store	Y	N	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	N	N	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
Web Site																														
Javascript tag	Y	Y	N	Y	Y	Y	Y	N	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
Cookie management	Y	Y	N	N	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y
Mobile Apps																														
SDK load	Y	N	N	N	Y	Y	N	Y	N	N	Y	Y	Y	Y	Y	N	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
Digital Ads																														
Audience API	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Cookie synch	N	Y	N	N	Y	Y	N	Y	Y	Y	N	Y	N	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	N	N	Y	Y	Y	
Offline																														
Postal address hygiene	Y	Y	Y	Y	N	N	Y	N	N	N	N	Y	N	N	Y	Y	N	N	Y	N	Y	Y	Y	Y	Y	N	Y	N	Y	Y
Name/address match	Y	Y	Y	Y	N	N	Y	N	N	N	N	Y	N	N	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	Y
Business to Business																														
Account-level data	Y	Y	N	N	N	N	Y	N	Y	Y	Y	N	N	Y	N	Y	Y	N	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	
Lead-to-account match	Y	Y	N	N	N	N	Y	N	N	Y	N	Y	N	Y	Y	N	Y	Y	N	Y	Y	Y	Y	N	Y	N	N	N	N	Y
Analytics																														
Segmentation	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Automated predictive	Y	Y	N	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	Y	Y	N	Y	N	Y	Y	
Engagement																														
Content selection	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	N	Y	N	Y	Y	N	N	Y	Y	Y	Y	Y	N	Y	Y	N	Y	
Multi-step campaigns	N	Y	N	N	N	Y	Y	N	Y	N	N	Y	N	Y	N	N	Y	N	N	N	Y	Y	Y	Y	N	N	N	N	N	N
Real-time interactions	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	N	Y	N	Y	Y	N	N	N	N	N	Y	Y	N	Y	Y	N	Y	Y

See following page for definitions. Revised 10.31.18

CDP Vendor Comparison

Definitions	
Shared CDP Features	
Every CDP can do all of these. Non-CDPs may or may not.	
Retain original detail	The system stores data with all the detail provided when it was loaded. This means all details associated with purchase transactions, promotion history, Web browsing logs, changes to personal data, etc. Inputs might be physically reformatted when they're loaded into the CDP but can be reconstructed if needed.
Persistent data	The system retains the input data as long as the customer chooses. (This is implied by the previous item but is listed separately to simplify comparison with non-CDP systems.)
Individual detail	The system can access all detailed data associated with each person. (This is also implied by the first item but is a critical difference from systems that only store and access segment tags on customer records.)
Vendor-neutral access	All stored data can be exposed to any external system, not only components of the vendor's own suite. Exposing particular items might require some set-up and access is not necessarily a real time query.
Manage PII	The system manages Personally Identifiable Information (PII) such as name, address, email, and phone number. PII is subject to privacy and security regulations that vary based on data type, location, permissions, and other factors.
Distinguishing Features	
A CDP doesn't have to do any of these. Many do some and some do many. These are divided into three subclasses: data management, analytics, and customer engagement.	
Data Management	
These are features that gather, assemble, and expose the CDP data.	
Base Features. These apply to all types of data.	
API/query access	External systems can access CDP data via an API or standard query language such as SQL. It's just barely acceptable for a CDP to not offer this function and instead provide access through data extracts. But API or query access is much preferred and usually available. API or query access often requires some intermediate configuration, reformatting, or indexing to expose items within the CDP's primary data store. Those are important details that buyers must explore separately.
Real-time access	External systems can access CDP data for a single customer in real time through an API call. Users may need to specify in advance which data elements will be available through the API.
Persistent ID	The system assigns each person an internal identifier and maintains it over time despite changes or multiple versions of other identifiers, such as email address or phone number. This allows the CDP to maintain individual history over time, even when source systems might discard old identifiers. CDPs that use a persistent ID applied outside of the system do not meet this requirement.
Deterministic match	The system can store multiple identifiers known to belong to the same person and link them to a shared ID (usually the persistent ID). This enables the system to connect identifiers indirectly: for example, if an email linked to an account is opened on a particular device, subsequent activity on that device can also be linked to the account.
Probabilistic match	The system can apply statistical methods and rules to associate multiple identifiers that appear to relate to the same person, even though no deterministic match is available. While many CDPs rely on third party services for this sort of matching, this item refers only to matching done by the CDP itself.
On-premises option	The system can be deployed within a company's own data center or on company-managed servers. Nearly all CDPs are sold as a service that runs on vendor-controlled server or a public server such as Amazon Web Services. In those cases, on-premises is usually an alternative offered for firms that prefer it.
Unstructured and Semi-Structured Data	
This refers to loading data from unstructured or semi-structured sources such as Web logs, social media comments, voice, video, or images. These are typically managed with "big data" technologies such as Hadoop. Nearly all CDPs use some version of this technology but it's only essential if clients have unstructured or semi-structured sources and/or very high data volumes. Some CDPs handle very high data volumes in structured databases such as Amazon Redshift.	
JSON load	The system can accept and store data through JSON feeds without the user specifying in advance the specific attributes that will be included. Additional configuration may later be required to access this data. There are some alternatives to JSON that offer similar capabilities.

CDP Vendor Comparison

Schema-free data store	The system uses a data store that does not require advance specification of the elements to be stored. Examples include Hadoop, Cassanda, MongoDB, and Neo4J.
Web Site	
This refers to interactions with the company's own Web site, whether on a desktop computer or mobile device.	
Javascript tag	The system provides a Javascript tag that can be loaded into the client's Web site and used to capture data about customer behaviors. Some CDP vendors provide full tag management systems but this is not a requirement for this item. This item does require that data captured by the Javascript tag can be associated with a customer record in the CDP database. This is usually done with a Web tracking cookie but sometimes through other methods.
Cookie management	The system can deploy and maintain Web browser cookies associated with the client's own Web site. The cookies can be linked to customer records in the CDP database.
Mobile Apps	
This refers to interactions with mobile apps created by the company.	
SDK load	The system offers a Software Development Kit (SDK) that can load data from a mobile app into the CDP database. It must be able to associate the data with individual customers in the CDP database. This is usually done through an app ID. Other SDK features such as message delivery are not a requirement for this item.
Digital Ads	
This refers to interactions through digital advertising networks, including Web site display ads, social media, video, mobile, and other formats.	
Audience API	The system has an API that can send customer lists from the CDP to systems that will use them as advertising audiences. The receiving systems might be Data Management Platforms, Demand Side Platforms, advertising exchanges, social media publishers, or others. Ability to receive information back from the advertising systems is not a requirement for this item.
Cookie synch	The CDP can match its own cookie IDs with third party cookie IDs to allow the marketer to enrich profiles with external data or reach users through advertising networks.
Offline	
This refers to interactions managed through offline sources such as direct mail and retail stores, where the customer's primary identifier is name and postal address.	
Postal address hygiene	The system can clean, standardize, verify, and otherwise work with postal addresses. This processing is reduces inconsistencies and makes matching more effective. Systems meet this requirement so long as the address processing is built into system process flows, even if they rely on third party software. Systems that send records to external systems in a batch process do not meet this requirement.
Name/address match	The system can find matches between different postal name/address records despite variations in spelling, missing data elements, and similar differences. As with postal processing, systems can meet this requirement with third party matching software so long as the software is embedded in their processing flows.
Business to Business	
This refers to companies that sell to other businesses rather than to consumers.	
Account-level data	The system can maintain separate customer records for accounts (i.e., businesses) and for individuals within those accounts. This means account information is stored and updated separately from individual information. It also means that selections, campaigns, reports, analyses, and other system activities can combine data from both levels.
Lead-to-account match	The system can determine which individuals should be associated with which account records, using information such as company name, address, email domain, and telephone number. This excludes processing done by sending batch files to external vendors.
Analytics	
These are applications that use the CDP data but don't extend to selecting messages, which is the province of customer engagement.	
Segmentation	The system lets non-technical users define customer segments and automatically send segment member information to external systems on a user-defined schedule. Ideally, all data would be available to use in the segment definitions and to include in the extract files. In practice, some configuration may be needed to expose particular elements. Systems meet this requirement regardless of whether segments are defined manually or discovered by automated processes such as

CDP Vendor Comparison

	cluster analysis.
Automated predictive	The system can generate, deploy, and refresh predictive models without involvement of a technical user such as a data scientist or statistician. This usually employs some form of machine learning. There are many different types of automated predictive; systems meet this requirement if they have any of them.
Engagement	This refers to applications that select messages for individual customers. It does not include content delivery, which is typically handled outside of the CDP.
Content selection	The system can select appropriate marketing or editorial content for individual customers in the current situation, based on the data it stores about them, other information, and user instructions. The instructions may employ fixed rules, predictive models, or a combination. Selections may be made as part of a batch process.
Multi-step campaigns	The system provides a user interface to set up a single campaign including a series of marketing messages for individual customers over time, based on data and user instructions. The message sequence is defined in advance but may change or be terminated depending on customer behaviors as the sequence is executed. Systems do not qualify for this item if they lack an interface for multi-step campaigns, even if users can direct customers from one single-step campaign to another.
Real-time interactions	The system can select appropriate marketing or editorial content for individual customers during a real-time interaction. This requires accepting input about the customer from a customer-facing system, finding that customer's data within the CDP, selecting appropriate content, and sending the results back to the customer-facing system for delivery. The results might include the actual message or instructions that enable the customer-facing system to generate the message.