

# **How to Get Started with a *Customer Data Platform***

*A practical step-by-step guide*

# So, you're considering getting started with a Customer Data Platform (CDP). And for good reason!

A CDP is one of the best investments you can make as a brand if you want to get closer to your customers and deliver the relevant experiences they expect.

In fact, according to Gartner, **63% of marketers say they still struggle to deliver personalized experiences at scale**, and CDPs are designed to solve exactly that problem. By adding a CDP to your tech stack, you're already a step ahead of the competition.

**By bringing data from different sources into one place and activating it intelligently, a CDP can help you:**

- ▶ Create more relevant, personalized, and timely communication across channels.
- ▶ Understand how your customers behave, and how to reach them more effectively.
- ▶ Stop wasting energy (and marketing spend) where it doesn't serve you.

**But** (and there's always a but), **the technology alone isn't enough.**

A CDP only works as well as the plan behind it.

The most successful CDP implementations don't start by ingesting every data source under the sun and plugging play. They start with a handful of clear, realistic use cases, a clean data foundation, and the right people to implement your strategy.

**This guide is made to get you started.**

To make sure you get off to a good start, this guide outlines the **5 phases** of every successful CDP implementation – from defining the first use cases to scaling gradually. Let's begin.

# 1. Define your first use cases

Before diving into data integrations or tech setups, begin by choosing a few clear use cases. These should be relatively simple and based on data you already have available or can easily obtain, and then they will guide everything that follows.

Every use case starts with a strategic goal you want to achieve:

- ▶ Improve campaign performance
- ▶ Reach new demographics
- ▶ Boost lead conversion

These goals then help you define your audience(s), and the data sets you need:

1

**Goal:** Improve brand campaign performance.

**Audience:** People interested in a particular brand or category.

**Data set:** Tracking/behavioral data like page visits and purchase behaviors.

2

**Goal:** Reach a new demographic.

**Audience:** People of a particular gender, age, or within a certain location (e.g. capital or rural).

**Data set:** CRM data.

3

**Goal:** Turn website leads into customers

**Audience:** People who engage with specific content or campaigns on your site.

**Data set:** Content-based data like page visits or content downloads.

Once you've defined your use cases, select the primary activation channels (e.g. e-mail, social media, or website personalization) where you want to bring these scenarios to life.

**Start small.** Activation channels can always be expanded later, so focus on the ones that are most important right now.

## 2. Map and validate your data sources

With your use cases in place, identify the data sources you need to power them. Ask yourself:

- ▶ What data do I actually need to power my chosen use cases?
- ▶ Where does the right data live?
- ▶ Do I **trust** this data?

### Potential sources:

 E-mail marketing systems

 Gamification/data collection platforms

 Website tracking

 CRM system

 Mobile app

 Content management systems

 Point-of-sale (POS) systems

 Loyalty and rewards programs

... and many other sources

At this stage, it's crucial to get an overview of how data flows between systems. Even if you're starting small, this work is never wasted as it sets you up to scale smoothly later.

### Did you know?

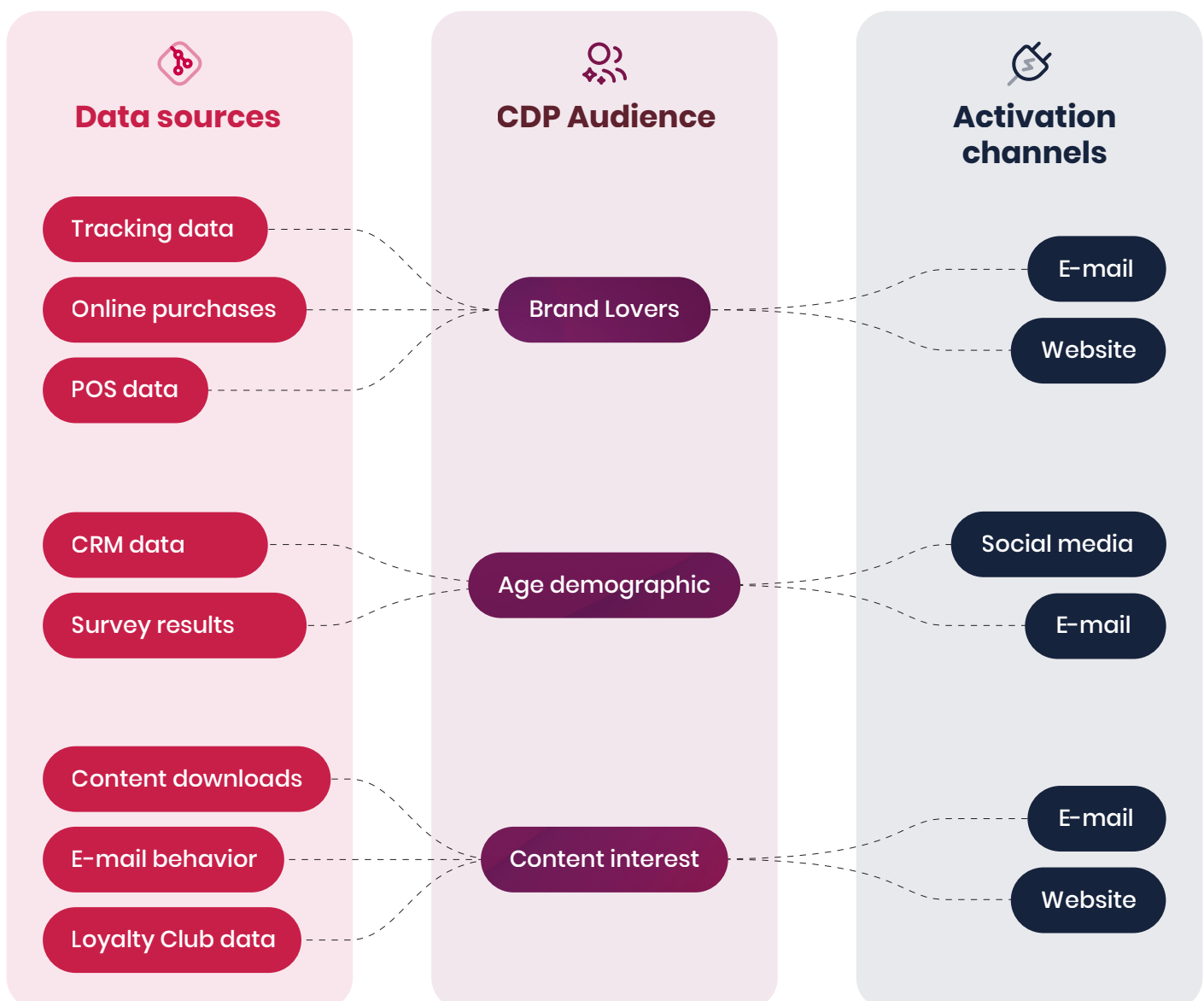
One of the most common misconceptions about a CDP is that it functions as data management systems. It does not. A CDP (like Raptor) will clean and streamline data on its way in, making customer data ready for activation in any channel. But the CDP is never better than the data that is ingested. If you aren't sure your data is sound, we always recommend starting fresh rather than onboarding poor data.

## Typical obstacles to watch for:

- Unclear or inconsistent data structures
- Outdated data sources
- Uncertainty about data ownership

At the end of the day, your brand is responsible for the data you collect, how you activate it, and whether or not your practices live up to GDPR requirements. That's why mapping customer data is one of the most important exercises you'll have to do as part of setting up a CDP.

The good news is that once your datasets are validated and ready to ingest, you'll have a much smoother journey going forward – and you can automate data-based activities with peace of mind.



### 3. Involve the right people

For a CDP project to succeed, you need to make sure you have the right people onboard to make it happen.

A common mistake we see companies make is treating the CDP like a marketing side project. It's not. A CDP touches data, tech, processes, and strategy. So, it's all about collecting the right people around the table, which, in turn, will make the whole project run easier at every stage.

#### **Here are the roles you most likely will need to fill:**



#### **End users**

These are typically your marketing specialists, CRM managers, e-commerce managers, or campaign owners. They know your business objectives, channels, and customer journeys, and they'll need to be involved at every step of the CDP process.

#### **Product owner**

This person keeps the full overview of the CDP project, coordinating between the CDP vendor (Raptor), the implementation partner, and all relevant internal stakeholders. It's a lasting role, central to every stage of the project – from implementation to ongoing use and optimization.







## Tech stakeholders

These usually sit in IT, data engineering, or digital development teams. They make sure that the right data sources are connected, structured, and maintained over time. These roles are important during the early phases of the project but will be less involved as the project takes off.

## Management / C-level

A CDP project requires time, budget, and coordination across teams. Having buy-in from leadership ensures that the CDP becomes a part of the long-term strategy across the organization.



## Implementation partner

We recommend using an implementation partner to handle the implementation or support you through the process. An agency has a broad view of the whole organization and can focus on ensuring that strategic goals relate to daily operations.

Early in the project, it's worth mapping out exactly who does what. It doesn't have to be complicated – just a shared understanding of where responsibilities lie. Once all roles are defined, it's time to create a project plan.

## 4. Project plan and activation

Once your use cases and data sources are defined, it's finally time to activate.

And here, we recommend setting up a project plan for you to follow along the way.

**But don't worry** – You will be guided through every step of the way, and you'll be attending workshops carrying you through the most important milestones. This is also where we'll map any potential challenges in your setup, so you won't get stuck.

**Here you see a rough example of a typical project plan:**





## 5. Scale gradually

Once the first use cases are live and running, you can start to think about what new use cases you would like to implement.

We recommend adopting **a use case mindset**, where you keep a constant backlog of ideas that can be prioritized based on current strategic goals.

Some audiences will be always-on while others will run in a limited period to support campaigns, local focuses or short-term goals.

Maybe you would like to target better **look-a-like audiences**, or maybe you want to retarget people who purchased during **last year's sales season**? The choice is yours, and options are only limited by the data you have available.

Here are some of the use cases we recommend at later stages:

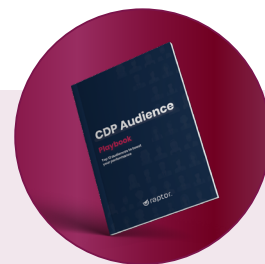
- ▶ Start using the **Customer Lifetime Value model** to find and target users based on loyalty, value, and churn risk.
- ▶ Get creative with **Calculated Attributes**, where you can create your own attributes on which to build audiences.
- ▶ Dive into the **Single Customer View** to discover the actual behavioral patterns of your customers. Who knows, maybe there's a way to reach them you haven't thought of before?

The important thing is to scale gradually, building your existing use cases at a solid pace.



Learn all about what a CDP is in our CDP Guide.

Open



Curious about Customer Lifetime Value? See the full CLV Guide and all the best use cases.

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# That's it! Time to get started?

This has been a quick introduction to how to kick off a Customer Data Platform (CDP) project.

While it can feel like a big undertaking, hopefully you're now seeing that it doesn't have to be overwhelming.

With a bit of preparation, clear priorities, and the right people involved, you can build a strong foundation that sets your business up for more personalized and data-driven experiences.

## A short recap

- ▶ Start with a few realistic use cases.
- ▶ Build on data you trust.
- ▶ Involve the right people early.
- ▶ Create a project plan.
- ▶ Scale step by step.

## Curious what a CDP project plan could look like for your business?

**Book a demo and let us walk you through how a project like this could look like for your business.**

[Book a demo](#)