



# Four Steps to Choosing a Customer Data Platform for Your Business

A Marketer's Guide by

**BitBang**



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# Why a Guide to CDPs Is Essential

Customer Data Platforms (CDPs) are powerful tools that aggregate, analyze, and activate the diverse data a company collects about its customers.

This data, often sourced from multiple channels, can be complex to consolidate.

However, a CDP simplifies this process, enabling marketers to manage uniform audience segments and coordinate timely, personalized communications across the most effective channels, all without the need for programming skills or technical expertise.

The CDP market, however, is far from homogeneous, and finding the right platform for your business can be a daunting task.

This guide provides a structured approach to selecting a CDP, outlining four key aspects that should guide a successful evaluation process.



Strategic Objective



People



Use Cases



Tech Vendor Selection

# Understanding the Needs of Marketers and the CDP Market in 2025

The term “Customer Data Platform” was first introduced in 2013 by David Raab, founder of the CDP Institute.

He recognized a specific need among marketers: a unified hub to manage customer data from various sources.

Since then, the CDP market has seen substantial growth.

Today, numerous vendors offer “packaged CDPs”, the “Composable CDP” concept has emerged, and larger corporations have opted to develop typical CDP functionalities using the technological stack they already own.

In today’s landscape, marketers must navigate a world characterized by increasing awareness of privacy among consumers and legislators, and decreasing cookie reliability.

In this context, managing first-party data and other customer information has become paramount.

Every company must determine its strategy concerning customer-centricity -or even customer obsession.

CDPs offer a solution to the challenge of managing customer data and orchestrating activities across channels.

They streamline marketing efforts and ensure consistency, even from the customer’s perspective.

This is why CDPs are gaining traction among business roles beyond marketing, including IT, sales, and customer service.

## Consumer Expectations Rise, Brands Respond

The growing interest in CDPs coincides with rising consumer expectations regarding the customer experience provided by their chosen brands.

Brands are responding to these expectations by launching initiatives on multiple fronts - personalization, omnichannel engagement, real-time interactions - and setting diverse goals, including conversion, loyalty, customer satisfaction, customer lifetime value, and more.

## Find the Customer Data Platform for your Use Cases

CDPs can significantly influence these priorities with a fresh and effective approach.

However, the solution must be carefully selected and implemented, considering the unique characteristics of the benefiting company.

# A Guide to Selecting a CDP

BitBang has supported clients across various industries in selecting and adopting a CDP, and collaborates with vendors offering diverse solutions. BitBang also manages the CDP Institute Italy Chapter.

This guide to selecting a Customer Data Platform is designed to provide a starting point for CMOs and other company stakeholders who wish to unify the management and activation of customer data.

We recommend evaluating four key aspects to identify a CDP that aligns with the company's needs, delivers value quickly, and continues to enhance this value over time:



# 1

## Strategic Objectives



# 2

## People



# 3

## Use Cases



# 4

## Tech Vendor Selection

# 1

# Strategic Objectives



Choosing a Customer Data Platform for your company begins with clearly outlining the strategic objectives the technology should address.

While market and technology trends evolve rapidly, a CDP project is not merely tactical.

The CDP will be integrated into the company's technological stack and daily operations, influencing timelines, methods, and opportunities.

Therefore, the introduction of a CDP is a strategic corporate initiative.

When choosing a CDP, consider long-term goals that align with your business model, measurable KPIs, and the architectural feasibility within your existing MarTech setup.

AI capabilities should not be overlooked, as they can significantly enhance the performance of your most critical use cases.

## Different Businesses, Different Objectives: Two Examples

### Retail Example

A retail player currently focused on enhancing its CRM dynamics will place a high value on delivering a **multichannel customer experience**.

This approach includes offline interactions, and requires a Marketing Technology stack capable of executing intricate single-channel and cross-channel use cases.

This strategy is particularly relevant for digital marketers aiming to create a **seamless customer journey** across various touchpoints.

### E-Commerce Example

An e-commerce retail business that has seen substantial growth in the post-pandemic era will prioritize customer retention. This involves creating a highly **digital customer experience designed to cultivate loyalty**.

# 2 People



People are crucial to the success or failure of any business transformation project, and the selection of a CDP is no exception.

While CDPs are often centered around marketing, they are a highly interdisciplinary platform with a wide range of implementations.

Sophisticated CDP solutions involve not only the marketing team but also data engineers, infrastructure architects, privacy experts, CRM teams, customer satisfaction specialists, analytics and insights professionals, retail and sales managers, agencies, and external partners.

Active participation from all individuals impacted by this new technology is crucial

from the beginning of the selection process.

This ensures that the chosen Customer Data Platform aligns with their skills, expectations, and team size.

An advanced CDP may go underutilized if technical teams lack sufficient resources.

On the other hand, a basic functionality CDP might not meet the needs of companies where multiple teams are involved in extracting value from customer data.

In both scenarios, adoption rates could decline, leading to a suboptimal return on investment.

## Project Leadership

The importance of project leadership cannot be overstated.

In highly digital businesses, the marketing function is likely to be the hub for customer data activation initiatives.

However, in more complex scenarios, multiple teams need to better understand customers and harness the potential of the CDP.

Project leadership should take this into account, ensuring a **holistic approach to customer data management that aligns with the company's strategic vision.**

# 3 Use Cases



Use cases are the blueprint for a company's Customer Data Platform initiative, outlining what the new technology should achieve and the value it should bring to the business. Before embarking on the selection process, it is essential to identify clear target use cases for three key reasons:

- 1. Return on Investment (ROI):** Every technological investment today must be justified with measurable outcomes. From the moment the new CDP goes live, understanding how to measure its effectiveness is crucial.
- 2. Engaging People and Teams:** Defining use cases is a critical step in involving individuals and teams. It provides an opportunity to articulate expected benefits, the roadmap, and operational priorities.
- 3. Alignment with Business Needs:** Use cases ensure that the CDP selection aligns closely with the business's specific requirements.

By defining and prioritizing their own use cases, companies can navigate the wide array of existing technological solutions. This minimizes the risk of being distracted by innovative or interesting features that may not necessarily be useful for the company's specific context.

## How Use Cases Guide CDP Selection: Two Examples

### Retail Example

A retailer tracking customers and sales across multiple sales channels, legacy systems, and diverse regions, will prioritize use cases related to **data normalization** and **identity reconciliation**.

Many CDP solutions available today offer great **flexibility** in ingesting data from various sources, defining normalization workflows, and creating customer identities based on fully **customized criteria**.

### E-Commerce Example

For a fully online business, cross-channel customer identity reconciliation will be a low or non-existent priority.

The most valuable use cases for a digital business are likely to be linked to **real-time data evaluation** for store **personalization or retargeting** through media or email.

**Businesses set extremely personalized objectives: for this reason, there is no one-size-fits-all solution.**

# 4 Tech Vendor Selection



The actual software selection phase is the moment when all the insights gathered in earlier stages are validated.

The Request for Proposal (RFP) should incorporate all the business elements that have emerged, such as strategic objectives, teams involved, and relevant use cases, into the scoring system.

To select the Customer Data Platform that best meets your company's needs, BitBang uses a structured evaluation framework. This framework helps assess how well each platform aligns with the priorities previously defined.

Key Evaluation Areas Include:

- Architectural Compatibility with Existing Stack
- Omnichannel Capabilities for Managing Complex Customer Journeys
- Real-Time Execution and Data Distribution Speed
- Integration with Campaign Orchestration Tools and Other Touchpoints

## Different Needs, Different Feature Prioritization: Two Examples

### Retail Example

An omnichannel retailer, which caters to customers through various touchpoints, will likely prefer platforms that excel in **profile orchestration** and campaign results **reconciliation**.

### E-Commerce Example

An e-commerce business, primarily focused on online operations, will look for a CDP that emphasizes **real-time data management** and offers seamless integration with digital and social media advertising channels.



Involving a specialized customer data partner like BitBang early in the process puts the company in stronger position to:



Address typical customer data management focal points from the outset.



Benefit from certified, dedicated teams across every customer data phase - from data collection and data management to personalized customer journeys and data activation.



Explore advanced applications of Data Science and Artificial Intelligence, such as dynamic segmentation and predictive models.

# BitBang

BitBang has a variety of Customer Data Platforms within its **partnership ecosystem** and supports brands across different industries on their customer-centric journeys.

This makes BitBang an **ideal partner** for **guiding your company's CDP evaluations**, as it brings **practical experience** and a **deep understanding** of the marketing and customer analytics needs expressed by today's most advanced and data-driven companies.



# Take Aways



## Strategic Objectives

### A CDP Project Must Be

- Strategic
- Aligned
- Integrated
- AI-Enabled



## People

### Foster

- Interdisciplinarity
- Active Participation
- Adoption

### Avoid

- Insufficient Functionalities
- Underutilization



## Use Cases

### While Designing Use Cases

- Consider Return on Investment (ROI)
- Engage People and Teams
- Align with Business Needs



## Tech Vendor Selection

### Technical Features to Consider

- Architectural Compatibility
- Real-Time Execution
- Omnichannel Capabilities
- Integration

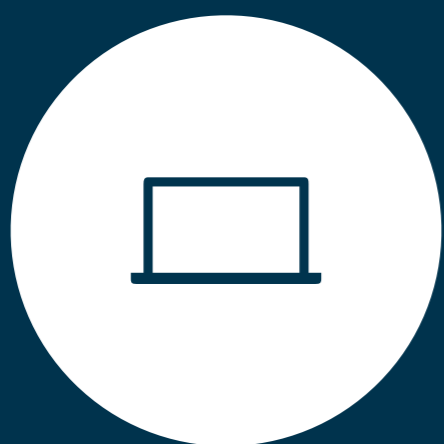
# BitBang

empowering data-driven decisions



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