



The 4-Step Guide to **CDP Success**





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Introduction

A difficult journey


Too often, managing a customer data platform (CDP) project feels like a treacherous mountain expedition.

You've got a motley cast of stakeholders as your only guides. Together, you traverse paths of conflicting business objectives that can lead nowhere. Few such journeys reach the summit in time with the crew intact – if you get there at all.

Segment's solution architects have transformed such treks into a straight path to project success. They've carried out thousands of implementations leaving stakeholders satisfied long after the last milestone by condensing the process into four simple steps.

The path to success

In this guide, we've plotted out the details of this path so you can ensure your Segment CDP project is a success, too.



Whatever your vision, at the end of every successful CDP project awaits streams of valuable data. Standards get you there. **Page 10**



Chapter 02

Step 1: Planning and championing your CDP project





Before starting implementation of your Segment CDP project, start by taking these three actions to understand what success looks like:

1. Envision the project outcome.
2. Map out the requirements.
3. Create focus with the CDP Value Generation model.

1. Envision the project outcome

CDP projects often start with people underestimating the work required to capture insightful and reliable data. Instead, they set off without a plan, expecting to piece together answers for their stakeholders afterward.

With such an approach, you might miss essential steps in the process and end up with dots you can't connect.

Form a clear picture of what you want to achieve. Ask why you will collect customer data and what the project will have accomplished when it's delivered.

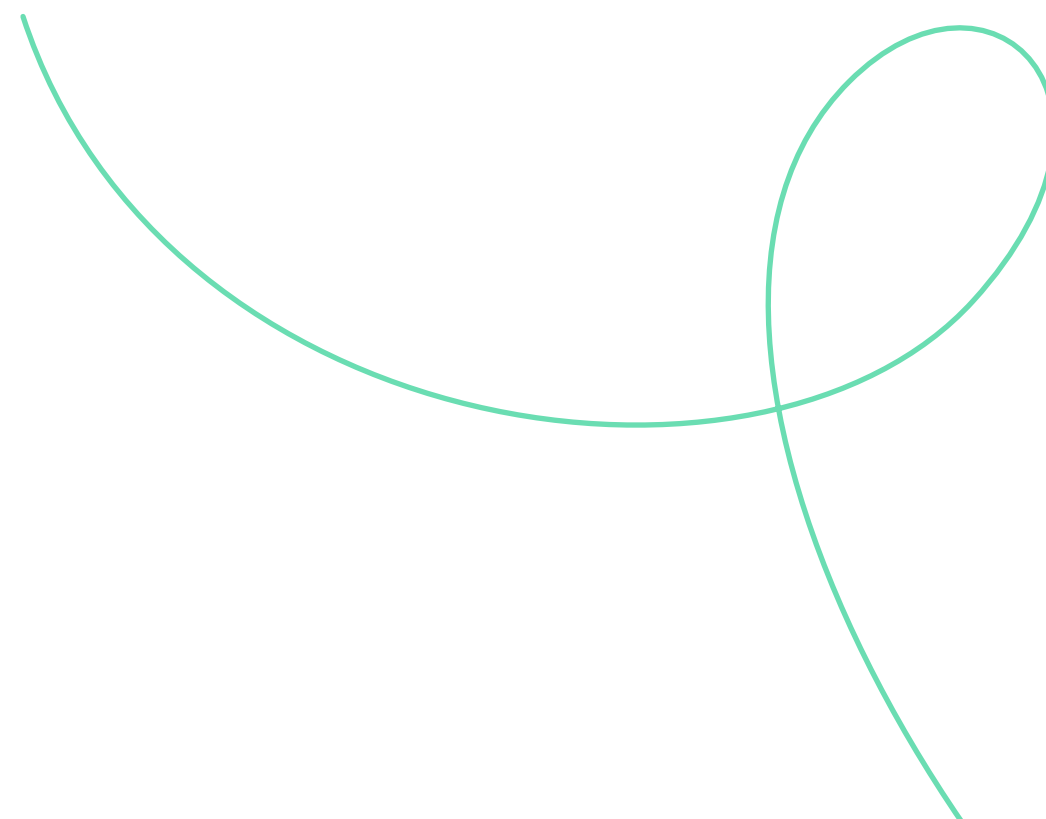
Abbas Haider Ali, VP of Customer Success and Value Engineering at Segment, encourages you to ask yourself: "What is the headline going to be when this thing is done?" This "working backwards" approach **comes from Amazon**, where product managers start new projects by writing the final press release instead of specs. The press

release becomes a guiding light and keeps everyone focused on customer benefits throughout the project.

Don't just do this exercise in your head. Write down how you imagine the press release by answering questions like:

- What's the headline?
- What bullet points sum up the project?
- Which numbers are included?
- What factors made the project a success?

Send this imaginary press release to other teams, stakeholders, and partners. A shared vision aligns everyone's efforts, a must-have for success.





2. Map out the requirements

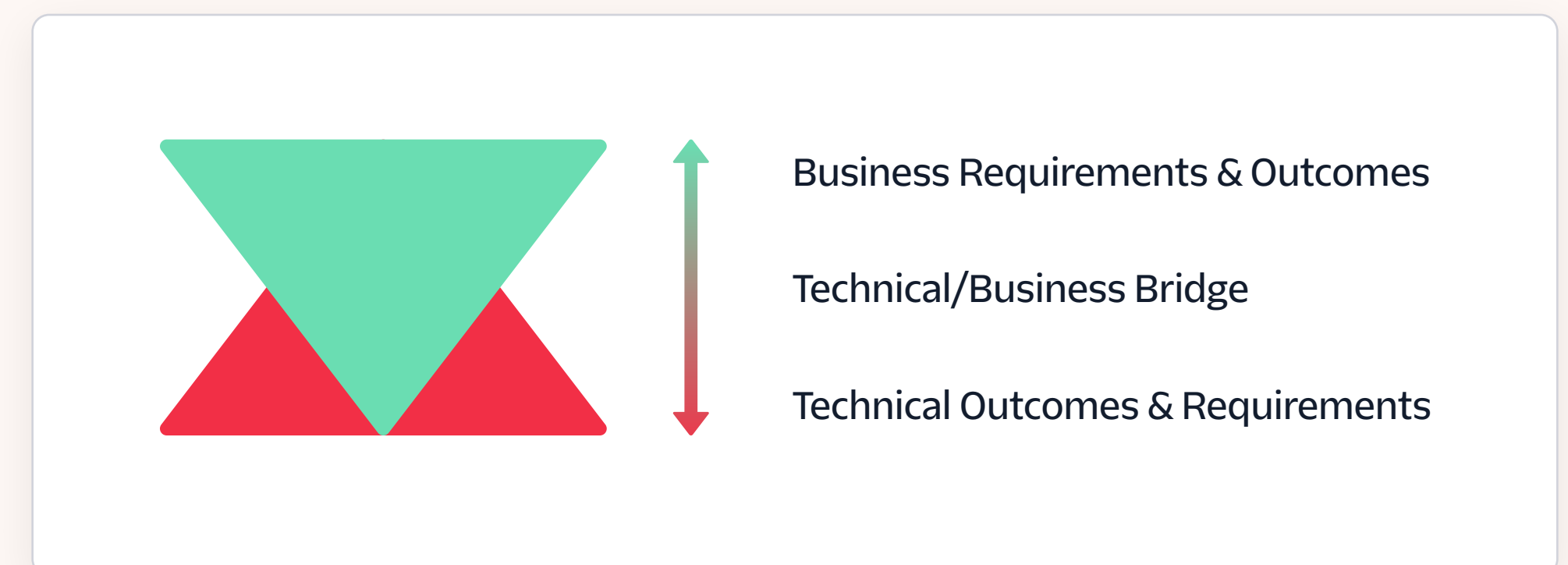
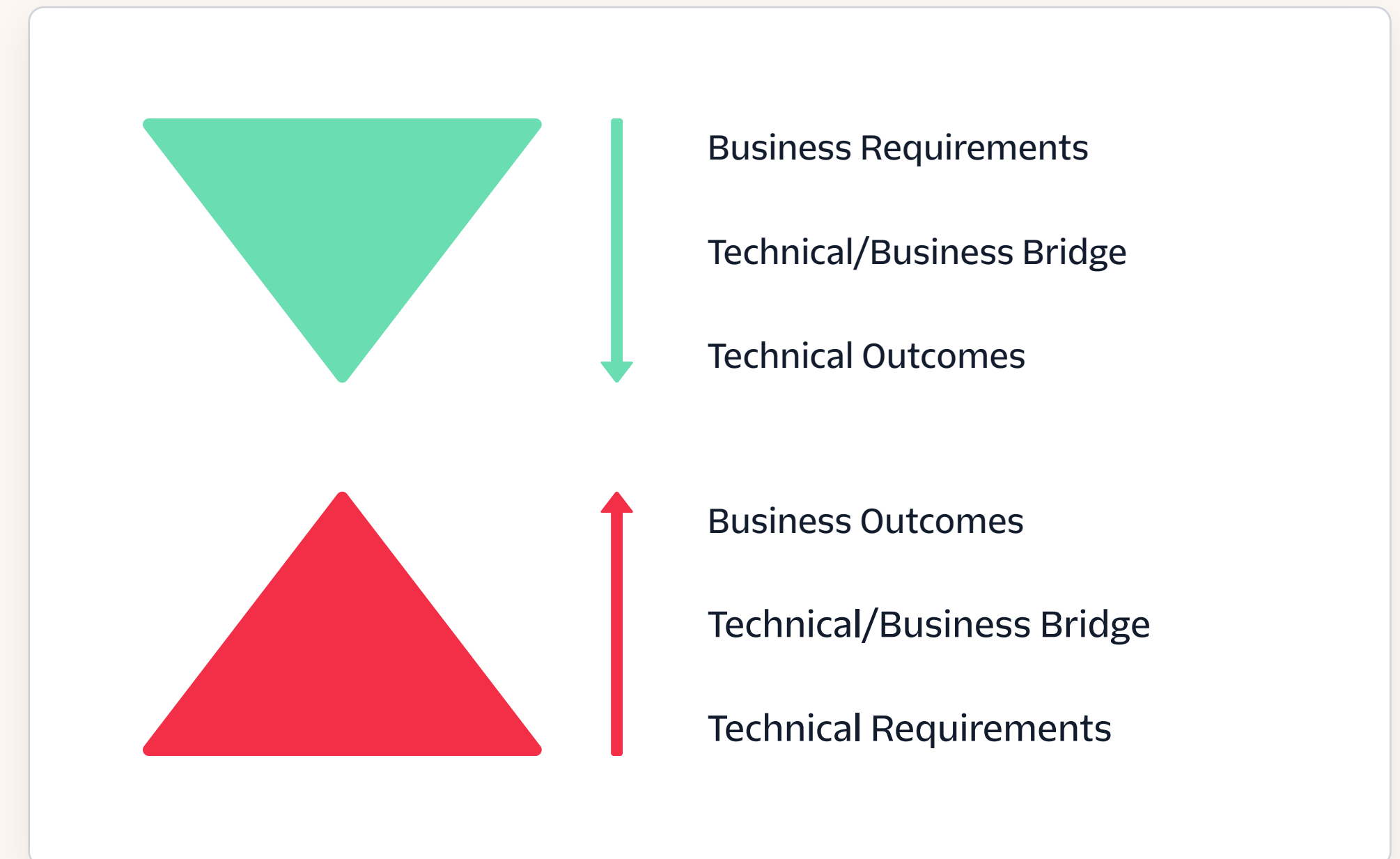
To detail your path to success, outline your CDP project's existing business and technical requirements. You can do this from either direction, starting from the technical or business side.

An example of a technical requirement informing a CDP project would be creating unified customer profiles for every touchpoint. Another might be enforcing data schema standards across the organization. Even though you can start from technical requirements, these eventually contribute to concrete business goals.

On the other hand, you can also start your project from business requirements. In 90% of cases, your CDP project is designed to accomplish one or more of these four goals:

- Make money.
- Save money.
- Mitigate risk.
- Further your mission.

Whether you start from a business or technical point of view, it's important to note that a CDP project needs input from **both directions**. Imbalance in either direction is a primary cause of misalignment and has the potential to sink your project before you're out of the gate.



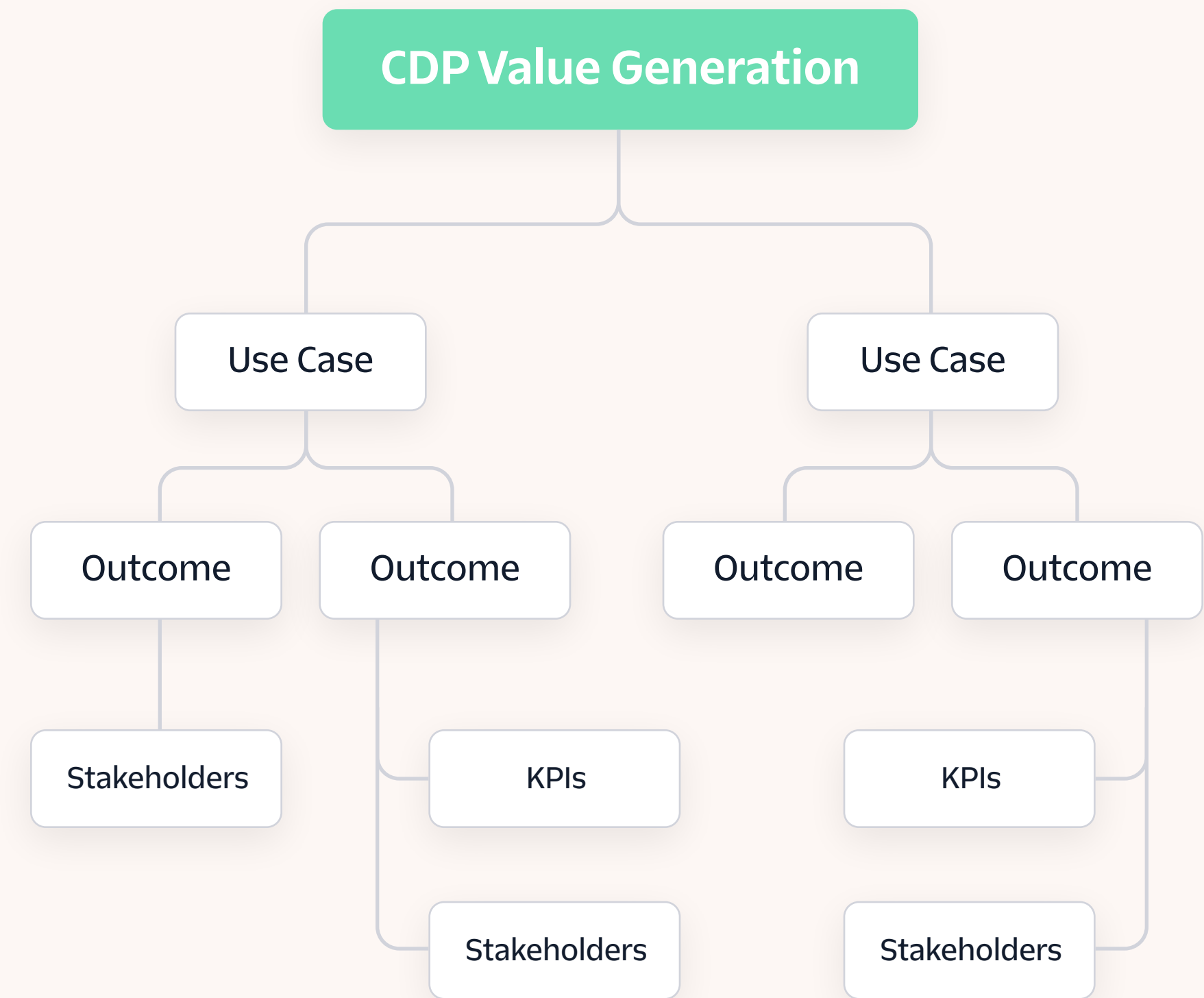


3. Create focus with the CDP Value Generation model

So, you have a clear vision – your “press release” – and a list of requirements. Put these pieces together in more detail using the CDP Value Generation model.

The framework brings together use cases, outcomes, stakeholders, and measurements (KPIs) in one overview:

- **Use cases:** What are you trying to do and for whom?
- **Outcomes:** What’s the desired outcome of each use case?
- **Stakeholders:** Who has an interest in that outcome?
- **KPIs:** Which metric validates if you’ve achieved your outcome? (Optional, as not everything is quantifiable.)





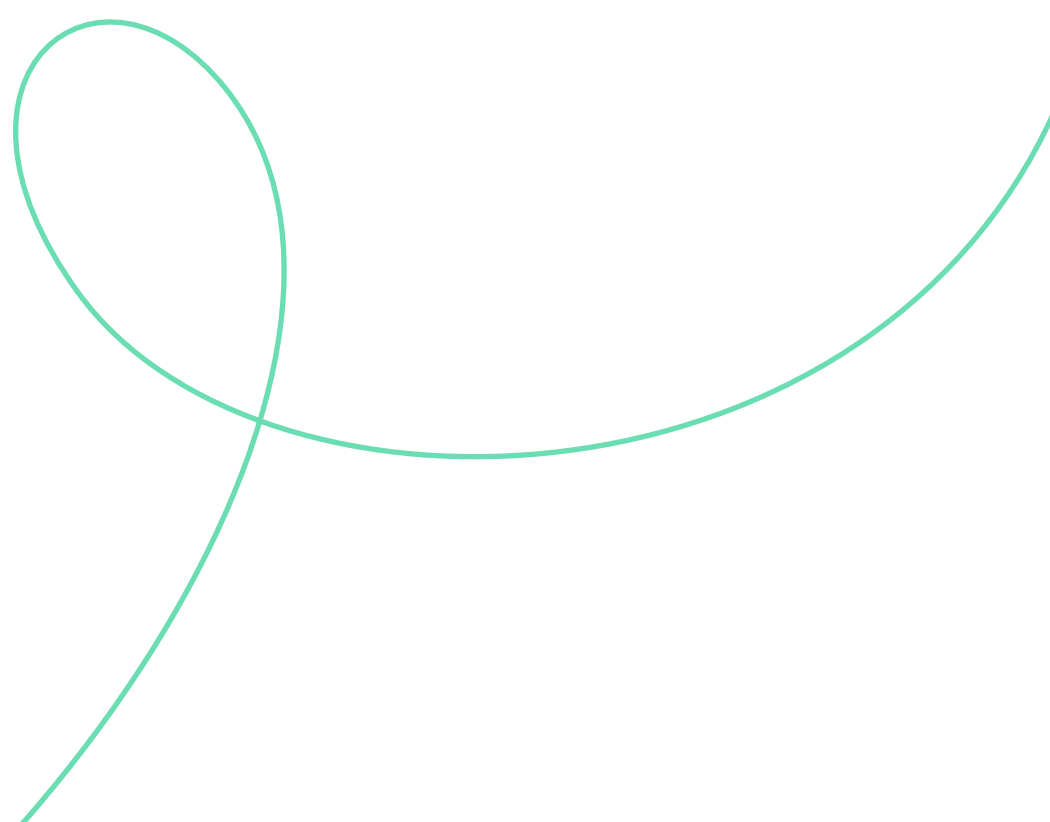
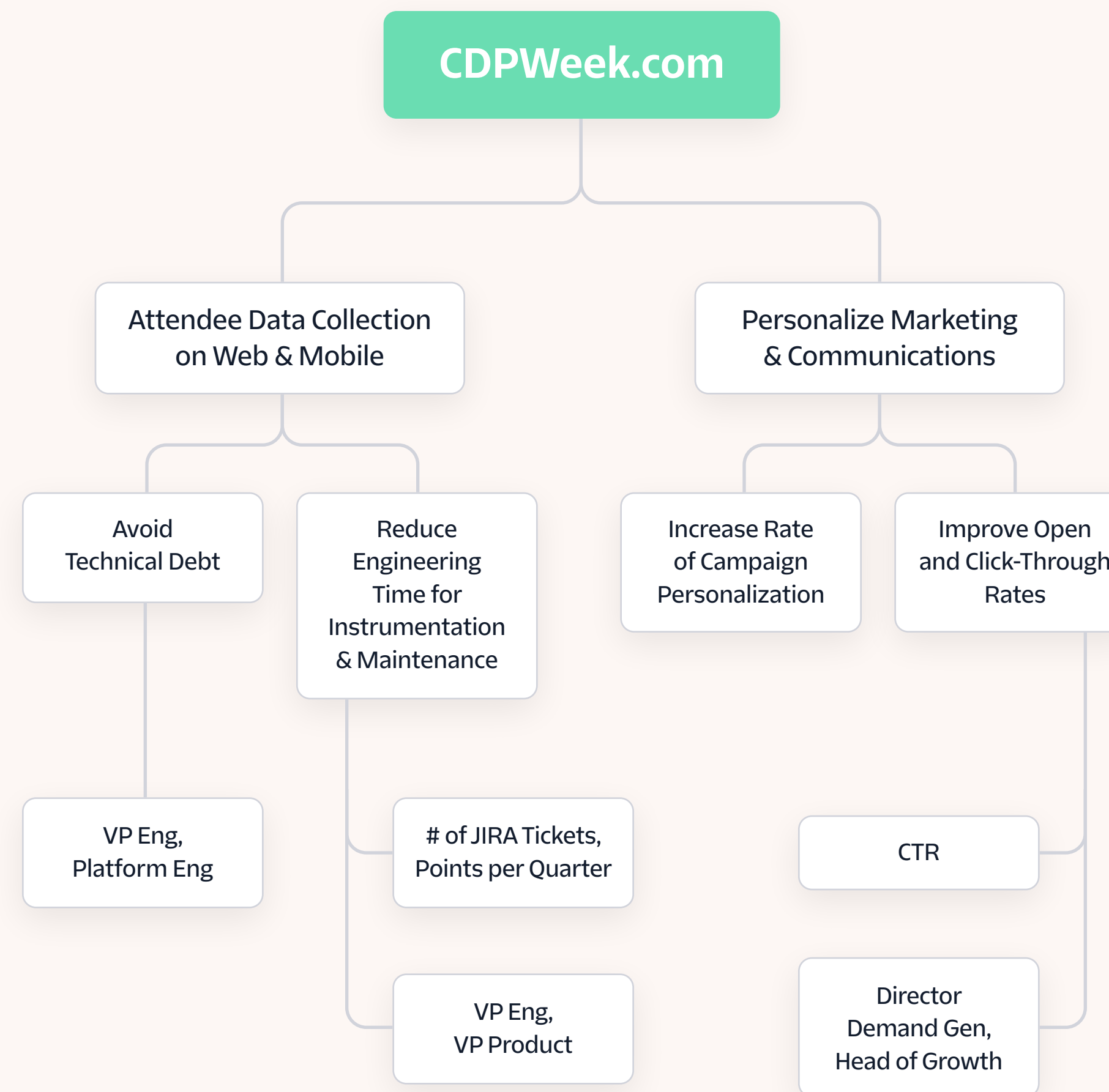
On the right side of the page is a sample model in action, used to plan Segment's data collection from the website for our annual event, **CDP Week**.

The first use case is a **business requirement** to personalize marketing and communications around the event. It has two outcomes, one of which is to "Improve open and click-through rates." Stakeholders are the Director of Demand Generation and Head of Growth with CTR as the primary KPI.

The second use case is a **technical requirement** to collect data on attendees' mobile devices and the web. One of its outcomes is to "Reduce engineering time on instrumentation and maintenance," the other is to "Avoid technical debt."

Both outcomes have VPs of Engineering and Product as stakeholders, and we measure the first one through the number of JIRA tickets.

The CDP Value Generation model gives you a map of your project outcomes that you can share with stakeholders. It helps everyone stay focused throughout the project, getting you to time to value quickly.





Chapter 03

Step 2: Build the right team to gather the right data





Whatever your vision, at the end of every successful CDP project awaits streams of valuable data. Standards get you there.

Seth Familian, principal of advisory services at Segment, puts it this way: “Behind every piece of good data is a great person who adopted a great standard.”

Setting standards requires a team with the right people. So before you move to implementation, you need to do the following:

- Set your data standards.
- Recruit people to uphold your standards.
- Decide and align on ownership.

Set your data standards

Setting standards is straightforward. All data attributes need to be consistent – in capitalization, spacing, and data type – across platforms, business units, and geography.

all data attributes...

Event Names
Prop/Trait Names
Prop/Trait Values

are consistent in...

Capitalization
Spacing
Data Type

across...

Platforms
Business Units
Geography





Standards result in useful data that:

- Reduces time spent on tedious extracting, transforming, and loading (ETL) to clean up bad data.
- Enables understandable reports, trusted from the bottom to the top of the org chart.
- Facilitates accurate automation and audience building for your marketing and product teams.
- Delivers a higher ROI on advertising spend with every audience you build.

Maintaining standards is the real challenge, which is why you need the right people.

Recruit people to uphold your standards

Adopt a standard for every event and property you track, and the outcome is good data. To successfully deliver your Segment CDP project, you need stakeholders who do this across your organization and help evolve the standards as your CDP matures.

Pulling this off requires an orchestration of people far beyond the engineering department. You need to have decision-makers on board who can champion the project at the executive level, provide access to crucial information, and unlock approval at the right milestones.





These are the essential roles for a CDP project:

- **Project Champion:** The executive sponsor, owns project escalations.
- **Business Owner:** Articulates business goals, KPIs, and use cases.
- **Technical Owner:** Understands the current technical architecture at your organization and allocates technical resources like engineers and data scientists.
- **Marketing Owner:** Defines campaign requirements and owns the downstream activation tools where you use customer data.

The number of people involved can change for every project, but the roles do not. The Project Champion might also be the Business Owner at a smaller company, whereas they're two different people at a larger one.

One common mistake at smaller startups is to ignore the marketing role while everyone is busy with technical implementation. Avoid this mistake by covering every role at the start of your project, even if several people on a small team will wear multiple hats.

Depending on your organization's size and the CDP project's scope, there can be many more roles reporting to the core ones we just covered. As Seth Familian likes to say, "It takes a village to standardize a CDP!"

Who's required to set CDP standards?



Project Champion

Exec Project Sponser who owns project escalations



Business Owner

Articulates business goals. KPIs and use cases to be realized



Technical Owner

Understands the current architecture and allocates technical resources



Marketing Owner

Defines campaign requirements and owns downstream activation tools



The roles reporting to a Business Owner could include:

- **Product managers:** Help unify all the event measurement standards so you can look at the same funnel metrics across products.
- **Business intelligence managers:** Create dashboards for your CDP's business goals and KPIs identified earlier.

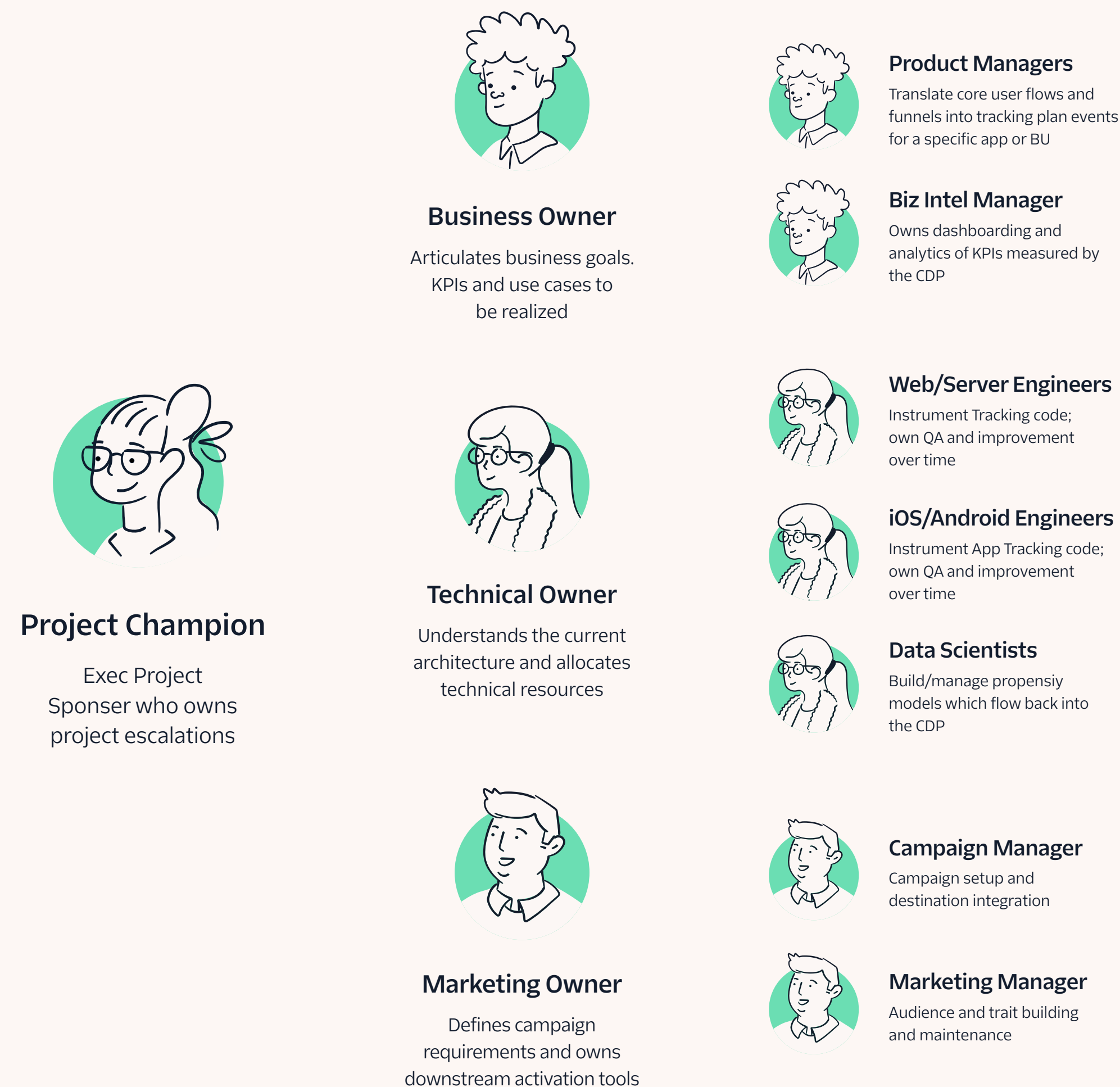
The roles reporting to a Technical Owner include:

- **Engineers (web, server, mobile):** Implement Segment tracks and identify calls (page and group) within various properties, like apps and the web.
- **Data Scientists:** Help the Technical Owner understand how to optimize the data on the backend.

The roles reporting to a Marketing Owner include:

- **Campaign Manager:** Sets up activation tools and manages destination migration. Also ensures events get delivered correctly and engagement activities run end to end.
- **Marketing Manager:** Builds audiences and traits in Segment for the Campaign Manager – essentially sets the standard for whom to target.

It takes a village to standardize a CDP!



Decide and align on ownership

You can choose from two ownership models for your data standard:

1. **Wrangler:** One taskmaster owns the standard across the entire CDP project.
2. **Champions:** You distribute ownership by cultivating product managers and engineers who adopt the standard and proliferate it throughout their teams.

Let your organization's culture inform what works best for you. If top-down decision-making is common, a wrangler might work best. If teams work more autonomously in a transparent environment, the champions model is suitable.

Before moving to implementation, make sure everyone understands which ownership model you've chosen and their roles and responsibilities.





Chapter 04

Step 3: Use a robust delivery process





From working through thousands of CDP implementations, Segment has developed a step-by-step methodology for delivering Segment CDP projects:

- 1. Readiness
- 2. Discovery
- 3. Planning
- 4. Implementation
- 5. Review
- 6. Ongoing

With these steps, you'll be ready to hit your desired outcomes and create widespread adoption of the CDP across your organization.

1. Readiness

Prepare your project using the elements we discussed in the previous chapters – envisioning your project outcome, setting standards, and bringing the right people on board.

This is also the time to plan and establish timelines for your project together with your stakeholders.

Activities

- Envision project outcome
- Set data standards
- Recruit your team
- Plan timelines.

Customer Onboarding Methodology



2. Discovery

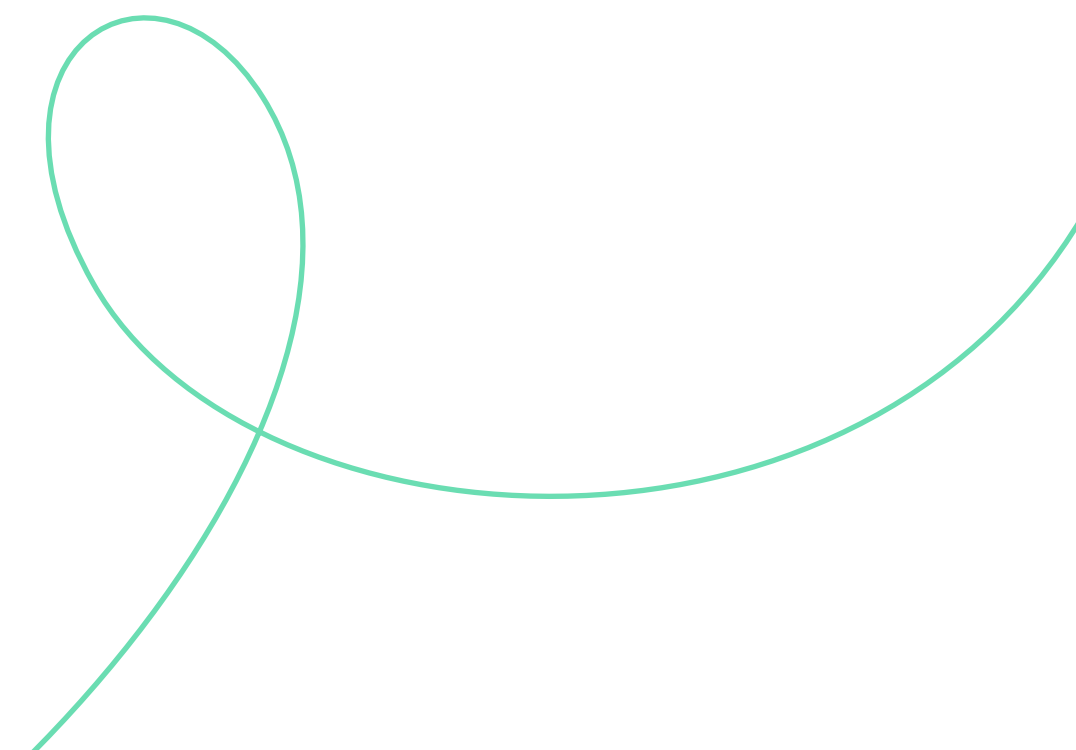
Define what the end-to-end solution will look like. You connect the goals and use cases from Readiness to the activities necessary to deliver the data. Make sure this includes an inventory of where data will come from and where it needs to go.

Say you have a business goal to acquire new users on a mobile app. You want to acquire these users via paid ads on social media and Google, and then engage and activate those new users using a tool like Braze. On top of that, you want to assess drop-off patterns to improve the user experience with Amplitude.

This is the level of detail you need during Discovery to design and map data flows for all the different tools you're connecting to Segment. You'll end up with a clear overview of data sources and destinations for the project.

Activities

- Define end-to-end design
- Data flows and mapping



3. Planning

Now, work on the specifics of the CDP implementation with:

- Tracking plans
- Prioritization decisions
- Migration planning

You use the tracking plan to connect all elements from previous phases—business outcomes, use cases, data flow diagrams—to specific data points. It’s your implementation’s backbone as you’ll soon hand over this plan to your engineers to start their work.

You also need to think about **prioritization** during planning, with questions like:

- Which platform or tool is most important for our business outcomes?
- Is there a particular tool that can quickly deliver value if we get the data in there first?

By asking these questions before implementation starts, you’ll know which tasks to work on first to deliver quick wins and accelerate time to value.

Finally, complete **migration planning**. Identify data points you’re already collecting with existing implementations, which you’re now going to reroute to Segment.

You might also have existing data sitting in systems that you want to backfill into Segment. Understand what that data looks like, how it exists in your systems today, and how you’re going to bring that into your new CDP.

Activities

- Build and prioritize tracking plans
- Prioritization decisions
- Migration and backfill planning



If you’re new to the world of tracking plans, here’s a quick primer:

“A **tracking plan** is a document or spreadsheet used across an organization to standardize how it tracks data. Often serving as both a project management tool and a reference document, a tracking plan aligns multiple teams around one strategy for customer data collection.

Essentially, a tracking plan consists of a list of events (i.e., user actions) accompanied by a description for each event.”



4. Implementation

Showtime! The engineers receive your plans from the previous phase and get to work. They'll set up downstream tools, and data starts flowing through them.

If a migration is involved, this is when you'll port over that data. You'll also be doing the backfill and see Segment welcoming its first data from your CDP project.

Activities

- Implement event tracking
- Connect downstream tools
- Migration and backfill

5. Review

Check the end-to-end implementation, and validate if everything is working. Your Segment workspace has first-class tooling available to support your quality assurance (QA) activities in this phase.

You'll cut over from your original setup to your new CDP implementation now.

Activities

- Validation (end-to-end)
- QA of tracked events
- Cut-over and go live

6. Ongoing

Note, there are some ongoing responsibilities – maintenance, iterating, and long-term planning – to ensure long-term success with a CDP.

This brings us nicely to our last chapter.





Chapter 05

Step 4: Grow to CDP maturity





To avoid your success plateauing, we use a four-level framework called “The Path to CDP Maturity:”

- **Level 0:** Your data is fragmented, slow, and untrustworthy.
- **Level 1:** You collect data reliably, understand it, and act on it in basic ways.
- **Level 2:** Data drives your KPIs and growth strategy.
- **Level 3:** You lead your category with data-driven UX.

Understand your CDP maturity level and prioritize actions that get you to the top.

Segment Professional Services (SPS) has established best practices for each level. You can follow these on your own or use our experts to accelerate your journey to the peak of maturity.

Level 0: Your data is fragmented, slow, and untrustworthy

The bottom of the CDP maturity mountain. You’re here because you don’t have a CDP, or you can’t use the data you do have.

Follow these signposts to start your trek to level one:

- **Bring your vision.** Make sure to pack your CDP Value Generation model with use cases, outcomes, stakeholders, and KPIs discussed in chapter one. Same for your tracking plans: don’t leave home without them.
- **Set standards with a single team first.** Beginning with one team lets you figure out what works before replicating the same set of events and implementation practices to more business units.

The Path to CDP Maturity





- **Plan with the future in mind.** Think about the teams that might end up being part of your CDP later on, and plan for that now. If you have complex user identifiers, don't set that one team's ID as your canonical identifier for everyone. Instead, name your external IDs explicitly, and leave room for that identifier in the future.
- **Don't track everything.** Everything you track creates overhead in event definitions, your data warehouse, and other tools where you need to weed through all those events. Use your business KPIs to determine the most valuable events and track those first. **AARRR (Pirate Metrics)** can also come in handy here. Using this framework, tie every tracking event back to a step in the funnel. If something doesn't tie back, then don't track it at this stage.

Segment Professional Services (SPS) offers **Jumpstarts**—fast and furious engagements in which we get you to level one in three to five weeks instead of the six or more months it might take you otherwise.

Jumpstarts begin with intensive strategic planning: Stakeholders typically need to commit 30 hours in the first week alone. The next step is implementation enablement and QA guidance around topics like connections, identity resolution, audience building, and activation for personas.

You'll learn about topics like the Segment API, what to measure, and new coding QA around our best practices. You'll end up leveraging Segment data and downstream tools through a basic campaign and one or two simple activations.





Level 1: You collect data reliably, understand it, and act on it in basic ways.

You have a solid CDP foundation, but your data still holds lots of untapped possibilities. To activate them, you need to climb to level two. Here's what that journey looks like.

- **Revisit and refine your data architecture.** If you haven't done so previously, sketch out your data architecture. Then, step back, look at what you've created inside Segment, and ask: "Could I make things a little bit more efficient? Are there opportunities to streamline things?" Your workspace might have gotten messy, or rogue events may have shown up. These are the kinds of things you want to fix. Review your architecture every six months, or, if you're growing fast, quarterly.
- **Remove low-value events.** In most CDPs, it's rare to run into a high-volume, high-value event. Segment experts often find one or two events accounting for 80-90% of a customer's API volume, with no business value to show for it. Usually, the offender is machine-generated, or the person closest to a measurement can't give a sound motive for its tracking. "It just sort of ended up in there." Or, "Some team over there ended up measuring it, and it's just in here." Get rid of such events and good things happen. Your data warehouse costs drop, you don't hit API or throughput thresholds, and the value you extract from your overall Segment workspace increases.

- **Deepen your data leverage.** More events, data, and identity calls end up downstream as you ascend to maturity—exposing new opportunities for utilizing your existing tools' features. For example, as a content company, you could start using propensity scores. Once people scroll more than halfway down an article page, you can take every tag associated with that page and connect those tags to a user's behavioral profile. A video company could do the same if customers watch a clip past the 30-second mark.
- **Close the email loop.** A lot of direct website traffic in Google Analytics comes from untracked email clicks. Often, this is because the user opened the link on a different browser or device. Close this loop using the query string API. It lets you pass AJS_UID, AJS_AID, the user ID, or the anonymous ID into the URL of any page with analytics Javascript in the header.

At this level, Segment Professional Services offers an **advisory audit and technical health check**. We develop a clear picture of your data flows that show what's working and what's not. We also look at your architecture for potential efficiency gains. These activities result in a plan of prioritized next steps for making fast and lasting improvements.





Level 2: Data drives your KPIs and growth strategy

The peak comes into view as you close in on complete alignment with the framework from the first chapter—you're comprehensive in your approach to planning and working toward that end goal of data driving your KPIs and growth strategy.

Here are the final signposts pointing to the top.

- **Start automating your documentation and processes.** Take your protocol schemas and auto-generated markdown to drive custom documentation hosted on GitHub, with changes automatically synced.
- **Continue to educate all your teams.** You can't rely on only your CDP project's implementation phase to train yourself and your team. Continue to refresh yourself on best practices and think about methods you're not yet leveraging with Segment. Spread what you learn throughout the organization on a regular cadence. The resources at the end of this chapter are an ideal place to start.
- **Leverage machine learning and AI models.** Many automated features are available to enrich your data. **Segment eCommerce spec events**, like "order

completed," let you measure recency, frequency, and monetary (RFM) values for your customers, as well as next-product-to-buy models. You can build these directly on top of your data warehouse and pipe them back into Segment in the form of SQL traits.

- **Cultivate champions or your wrangler.** If you haven't done so, you need to start cultivating those project champions or the wrangler we talked about in the second chapter. Ensure that they have the tools they need to manage change as it inevitably happens in your workspace.

At this level, SPS offers **Resident Architects** custom scoped to your needs based on an annual commitment. This service comes with three pieces:

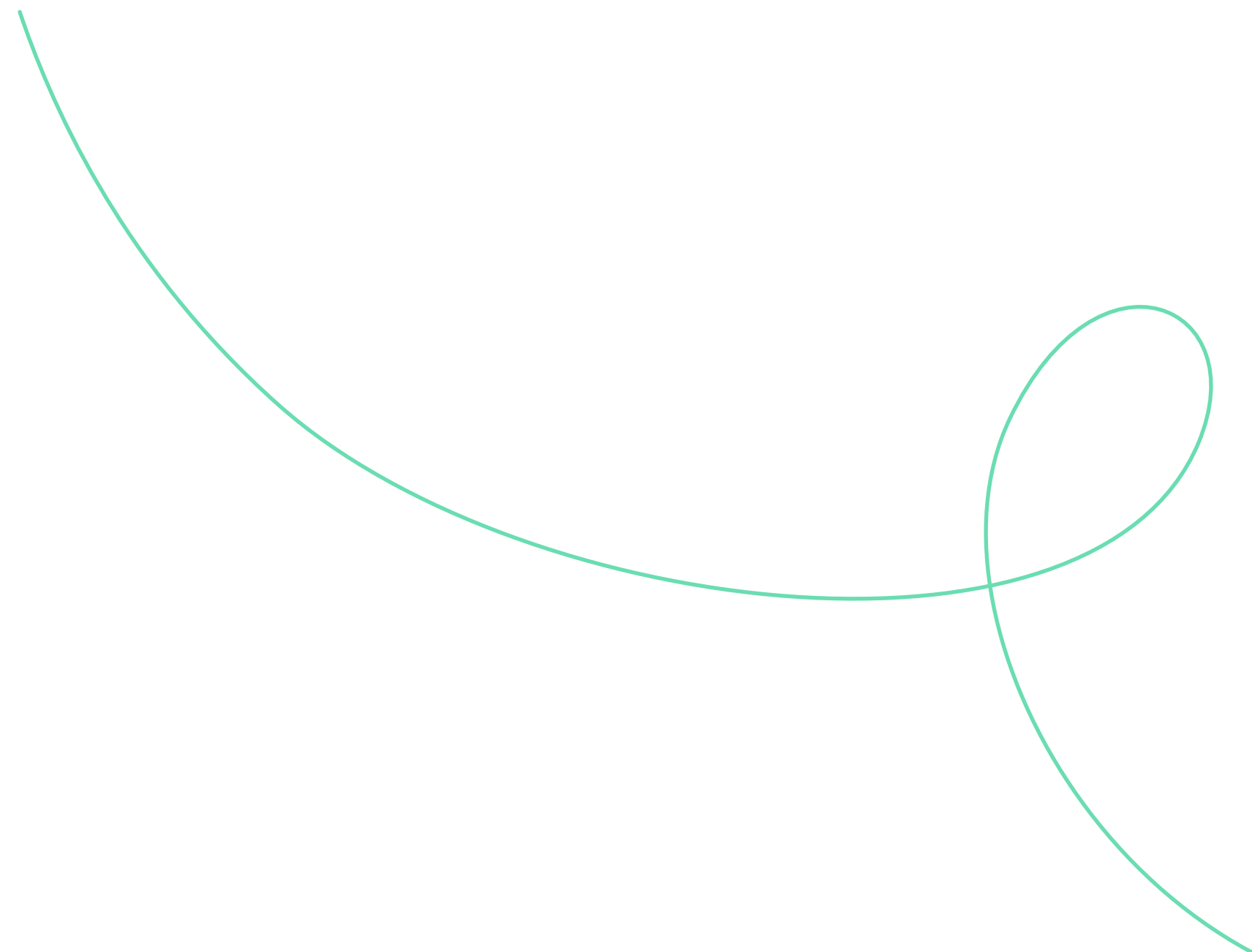
1. Ongoing team enablement teaches your teams about best practices around topics like the pixel API or the query string API for personas and audience-building.
2. Strategic guidance where we work with you on data strategy around specific aspects of Segment.
3. Dedicated contacts on our customer support and engineering teams.



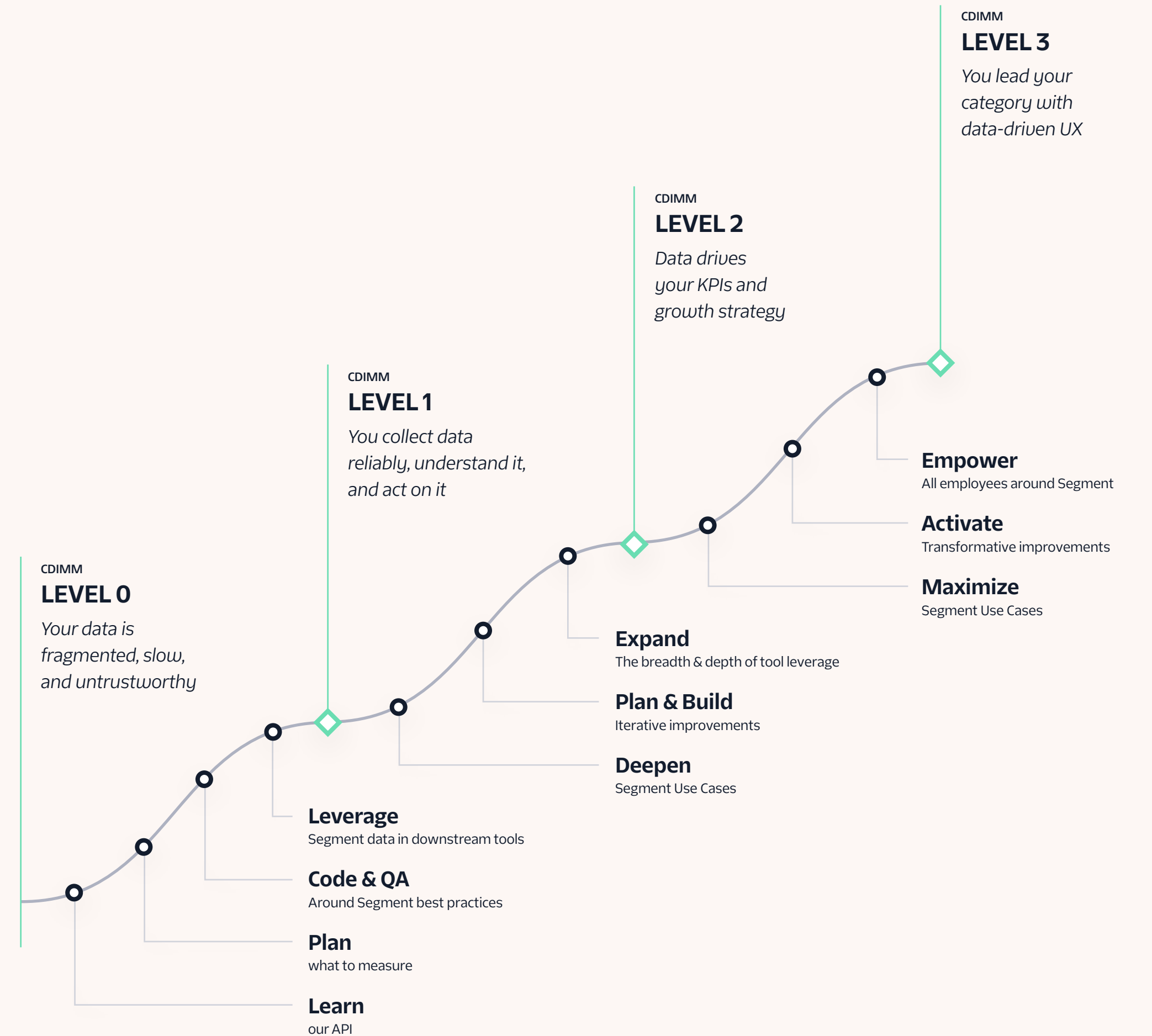


Level 3: You lead your category with data-driven UX

This is it, the top of CDP maturity. Everyone in the organization can articulate the value of customer data for their role, and transformative improvements happen across the organization because you're making the most of Segment's features.



The Path to CDP Maturity

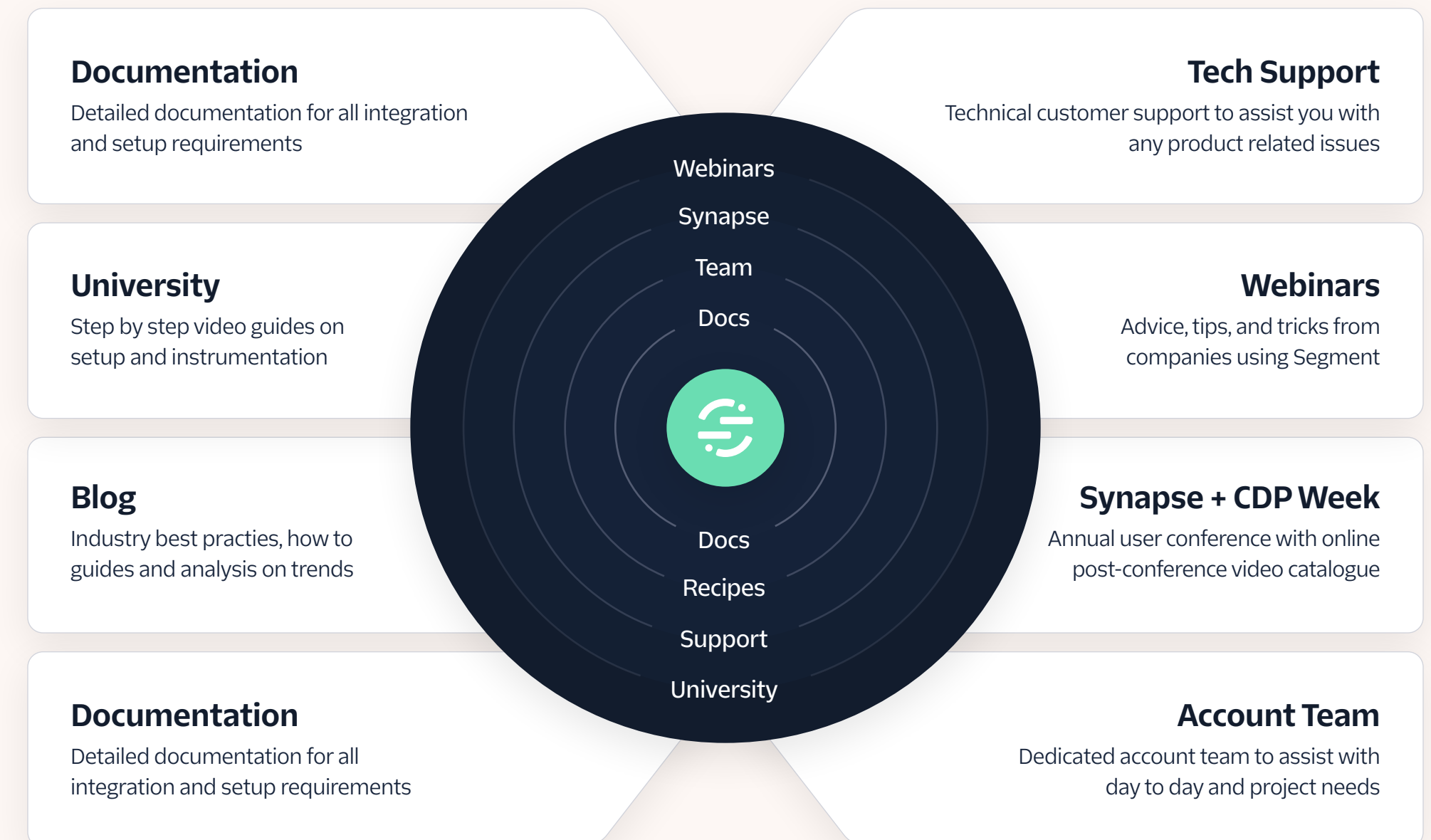




Resources for your climb

To support you on your journey to peak CDP maturity, Segment offers free resources for self-starting.

- **Online CDP maturity check:** A **small online quiz** to evaluate your current data strategy. You'll immediately receive actionable recommendations on how to improve.
- **Documentation:** Detailed documentation for all integration and setup requirements.
- **Segment University:** Step-by-step video guides on setup and instrumentation.
- **Blog:** Industry best practices, how-to guides, and analysis on trends.
- **Recipes:** Proven methodologies for executing complex use cases.
- **Tech Support:** Technical customer support to assist you with any product-related issues.
- **Webinars:** Advice, tips, and tricks from companies using Segment.
- **Synapse + CDP week:** Annual user conference with online post-conference video catalog.
- **Account team:** Dedicated Account Team to assist with day-to-day account and project needs.





Chapter 06

Benefits of your CDP project's success





With your first CDP project journey completed, you'll see many benefits as you follow the path to CDP maturity, including:

- **Reduced time to business results:** Our approach prioritizes your most important objectives, reducing time to value that **shows in your bottom line**.
- **Democratized customer and product insights:** Your CDP unifies your customer journey across all channels and platforms into a single view accessible for the entire organization.
- **Increased value from all your tools:** With a correct CDP implementation, your tools receive more data, unlocking new functionalities and value.
- **Scalable, trusted foundation for expansion:** Your CDP shifts focus from third to first-party data sources, reducing compliance risks and increasing customer trust. You'll also have an infrastructure that's ready for quick and flexible expansion.

Ultimately, a CDP exists to deliver value to your customers and business. Follow our process, and you'll achieve CDP project success fast and reliably. Plus, you'll set yourself up for continuous gains by working towards CDP maturity.





Today's leading companies trust Twilio's Customer Engagement Platform (CEP) to build direct, personalized relationships with their customers everywhere in the world. Twilio enables companies to use their communications and data to add intelligence and security to every step of the customer journey, from sales to marketing to growth, customer service and many more engagement use cases in a flexible, programmatic way. Across 180 countries, millions of developers and hundreds of thousands of businesses use Twilio to create magical experiences for their customers.

For more information about Twilio (NYSE: TWLO), visit: www.twilio.com.

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