

Perfecting Customer Data: The CDP Playbook for Marketing Teams



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Introduction

Personalize the customer journey experience using data you trust

Marketing teams have more channels, more data, and more tools in their tech stack than ever before. But for most marketers, this abundance can cause more problems than solutions.

Stitching the customer journey together into one view, and making sure the same data is being used across your tech stack, is a massive task. Having a single view of the customer is table stakes for any modern marketer, and it's only possible with a customer data platform (CDP).

CDPs make it simple to connect all marketing touchpoints – both online and offline – to understand how marketing efforts impact bottom-line revenue. This understanding can provide insights into which audiences perform best, what messaging strategies are resonating, and, ultimately, how to allocate your marketing dollars to make the most impact.

“Only 11% of businesses have the right data infrastructure to provide a consistent experience across channels.”

FORRESTER®

What is a customer data platform?

A customer data platform is a tool to help you bring reliable customer data to every other tool and team in your organization. CDPs help you with:

Data collection

Bringing together data from your website, app, and other business applications.

Data governance

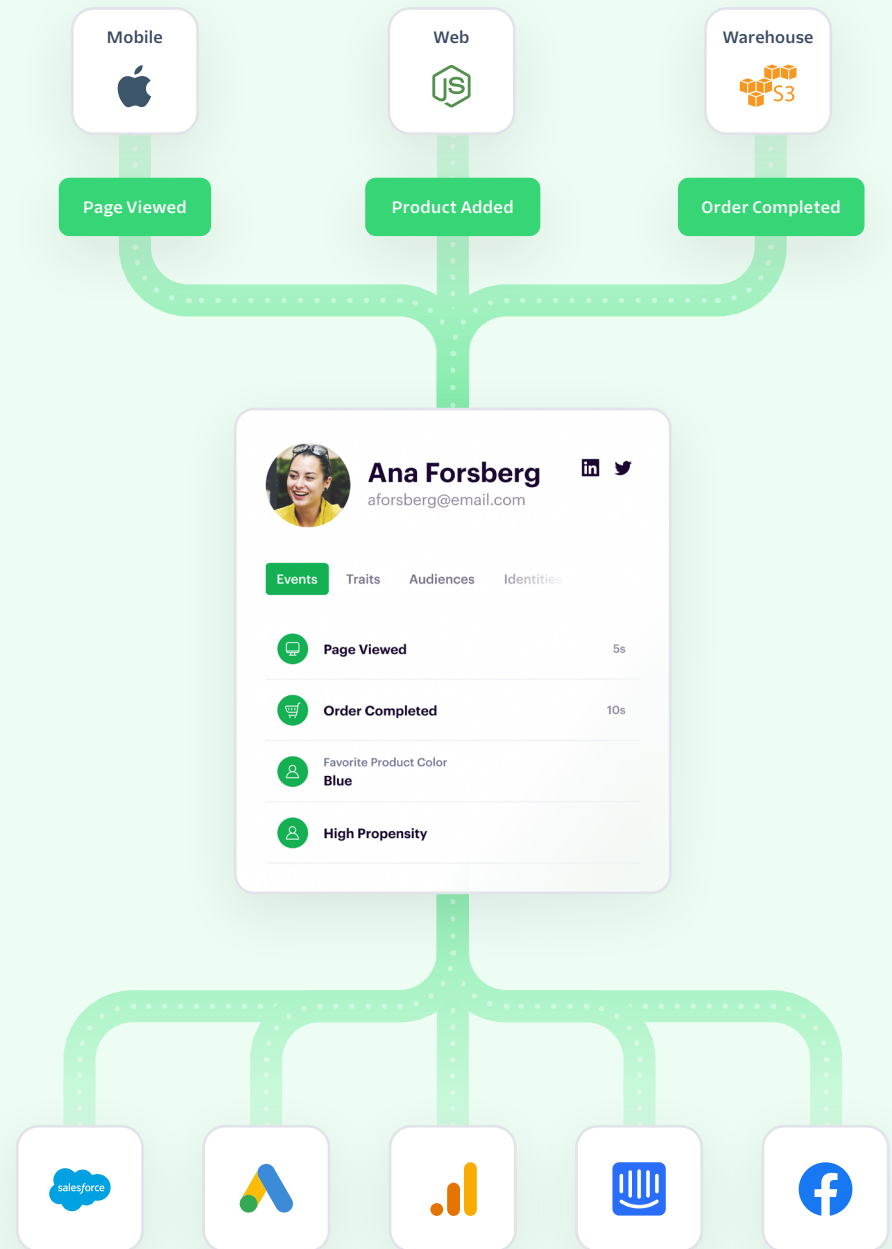
Standardizing your data to ensure accuracy, reliability, and privacy compliance.

Data synthesis

Combining all of your customer data to create and enrich unified profiles.

Data activation

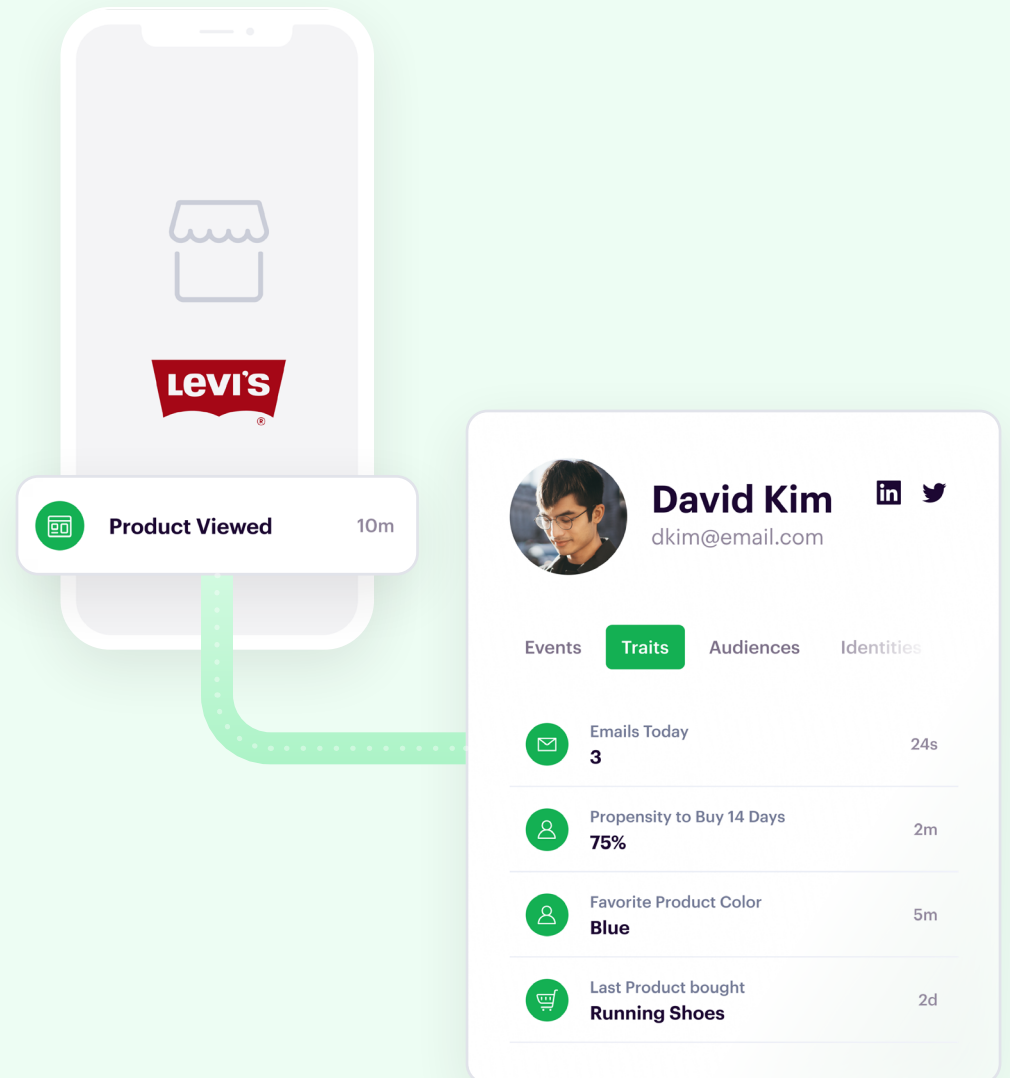
Connecting customer profiles to your growth and analytics tool stack to improve the customer experience.



Why your marketing team needs a CDP

CDPs make it easier to connect all of your digital experiences – from advertising campaigns to websites to email marketing. This connected user journey helps marketing teams understand customer behavior, build better-performing advertising audiences, and concretely showcase the marketing team’s impact.

Marketers can gain a complete view of each customer by unifying customer touchpoints across all platforms and channels. Target the right customer with the right message at the right time. And build audiences and create real-time campaigns without relying on other teams. Discover what [Segment for Marketing](#) can do for your business.



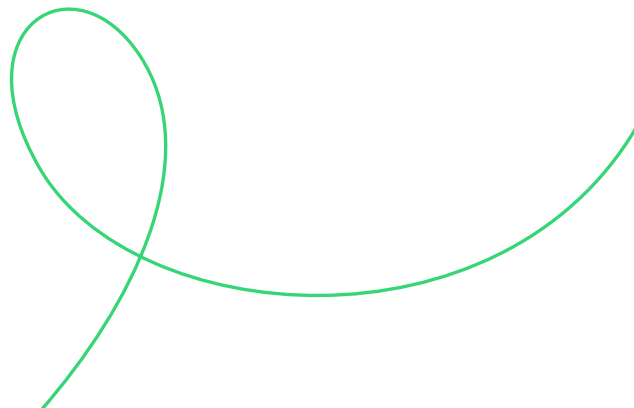
Use AI to turn every customer interaction into a unique customer experience

Segment's CDP enables businesses to gain a deeper understanding of their customers with trusted data built on relationships. Segment makes it easier than ever to understand, predict, generate, and engage each individual customer in real time and at scale for better personalization.

Marketing teams are better able to understand the nuances and complexities of every customer's relationship to your brand, their household, account teams, and the world around them with enriched and extended golden profiles, which join Segment's profile data with existing object data from your warehouse to create a single view of the customer.

Put accessible and actionable AI at marketer's fingertips

Marketers today need to not only understand past customer behavior, but also be able to anticipate and act on customers' future wants and needs. Traditionally, marketers have had to rely on data science teams to model forward-looking data trends, requiring time and resources that some companies don't have.



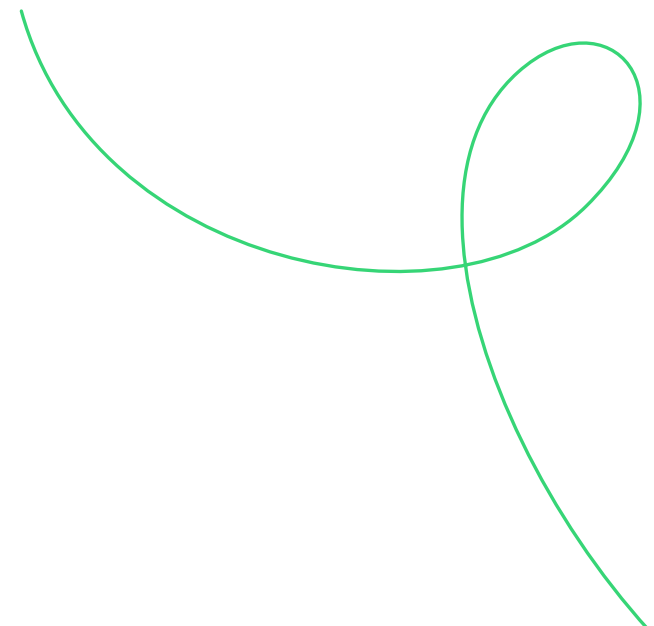
*“As marketers, the holy grail is to reach your customers and prospects in a way that is meaningful, relevant, and additive to them. **CustomerAI Predictions has equipped Box’s marketing team with the ability to forecast customer behavior to a degree that was simply unavailable to us before.***

We’ve been able to explore segmenting our audience based on predictive traits like who is most likely to join us at in-person events or who is more likely to purchase, and this allows us to meet those people where they are in their customer journey. Tools like Predictions put marketers at the center of this new era of AI which is transforming how companies engage and retain their customers.”

Chris Koehler
CMO, Box

With CustomerAI Predictions, Segment gives marketers out-of-the-box predictive AI models, empowering you to predict customer lifetime value (LTV) or likelihood to purchase, churn, or perform any event tracked in Segment, without needing to tap technical teams. Once created, marketers can quickly and easily use these AI Predictions to launch precisely targeted campaigns, trigger timely customer journeys, and personalize experiences.

By putting the power of AI in marketers hands and removing the data science bottleneck in organizations, Predictions saves teams time, optimizes campaign performance, improves customer retention, and unlocks new revenue opportunities.



Engage predictive audiences

CustomerAI Predictions also includes [Predictive Audiences](#), which provides marketers with pre-built suggested audiences leveraging Segment's out-of-the-box Prediction models. These Predictive Audiences are built to inspire new campaign ideas for marketers and help you quickly create predictive AI audiences in just a few clicks.

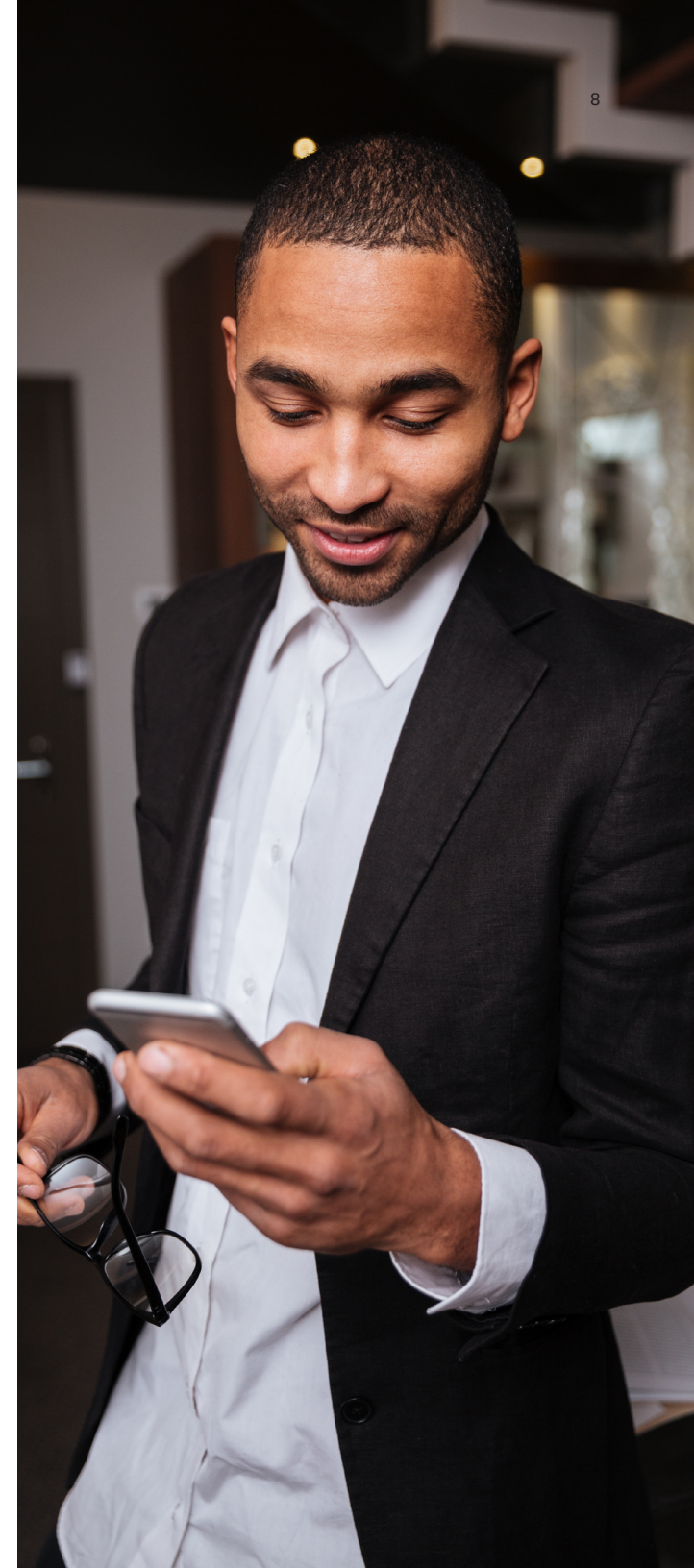
Predictive Audiences include the following audiences pre-built with your organization's unique customer data set in Segment:

- **Ready to buy** audiences of customers who are most likely to purchase
- **Long shots** audiences of customers who have previously interacted with your brand but aren't currently engaged
- **High LTV** audiences of customers with high predictive lifetime value
- **Potential VIPs** audiences containing recently active customers with high predictive lifetime value as well as a high likelihood to purchase
- **Dormant** audiences of inactive customers who are unlikely to purchase

Create, activate, and iterate faster for better results

Marketing teams are able to build the most engaging campaigns in minutes with customer-aware generative AI that automates who to target, how to build the journey, and what messages will resonate best with real-time insights for better results.

Learn more about how Segment makes it easier than ever to understand, predict, generate, and engage each individual customer in real time and at scale by exploring [Segment AI](#).



Optimizing customer experiences with a CDP

Marketing teams rely on CDPs to understand the customer journey and easily create audiences and user segments to personalize marketing initiatives.

CDPs improve marketing attribution, customer lifetime value, customer acquisition costs, return on ad spend, ROI of the marketing and growth stack, and more.



Marketing and growth teams with a CDP benefit from:

- ✓ Access to a complete view of the customer and customer journey
- ✓ An ability to easily create and use audience segments
- ✓ Optimized customer experiences
- ✓ Deep understanding of marketing attribution and CAC per channel
- ✓ Strong LTV, CAC, ROAS, and ROI due to personalized and targeted marketing

Marketing and growth teams without a CDP struggle with:

- ✗ An incomplete view of the customer
- ✗ Blockers creating and using audience segments
- ✗ Generic customer experiences
- ✗ Limited understanding of marketing attribution and effectiveness
- ✗ Poor LTV, CAC, ROAS, and ROI, due to generic or poorly targeted marketing

What Segment can do for you

Understand the full user journey

Combine data from all of your marketing tools to produce a single, comprehensive view of each customer.

Build your own predictive real-time audiences

Build audiences based on accurate, real-time data without relying on other teams. Then, send those real-time audiences downstream to every tool in your tech stack.

Power marketing attribution

Use clean, accurate, and unified customer data to understand your best acquisition channels and reliably measure your impact.

Get your data AI-ready

Segment makes it easier than ever to understand, predict, generate, and engage each individual customer in real time and at scale.

“Segment allows us to be a lot more precise with how we dynamically suppress or target users in ad campaigns based on actual product uses.”



Sam Coren

Senior Demand Generation Manager, DigitalOcean



Customer use cases: optimize campaigns and lifetime value

BONOBOS

USE CASE

Optimize campaigns and lifetime value.

INDUSTRY

Retail

HEADQUARTERS

USA

CHALLENGE

Bonobos wanted to drive offline sales and have shoppers experience the brand in person by visiting its brick-and-mortar locations. Bonobos ran Facebook ads to encourage shoppers to make in-person appointments, but it was difficult for the team to attribute the ads and understand how online spend influences offline behavior.

SOLUTION

Bonobos engaged Segment to gain a deeper understanding of marketing attribution and campaign effectiveness. Bonobos can now identify whether purchases are made online or during an in-store visit, and attribute how many purchases are the result of Facebook ad campaigns.

RESULTS

Segment arms Bonobos with a better understanding of marketing effectiveness to optimize ads and drive more users to its stores. Segment's Facebook integration and Facebook ads resulted in a 3x increase in offline and online purchases, and a 2x increase in website purchase return on ad spend.

[Read the full customer story](#)

“As our business grows, it has become increasingly important to understand how online spend influences offline behavior, which Facebook and Segment have made possible.”



Micky Onvural

Co-President, Bonobos



USE CASE

Optimize campaigns and lifetime value.

INDUSTRY

Healthcare

HEADQUARTERS

USA

CHALLENGE

Allergan faced increasing competition for its flagship product Botox. Botox needed to build relationships with customers directly and transition to a direct-to-consumer marketing model.

SOLUTION

Allergan implemented Segment to build the customer data infrastructure and marketing stack it needed to transition from a doctor-centric marketing strategy to engaging customers and prospects directly. Segment captures, centralizes, and unifies Allergan’s customer data to personalize marketing and communications.

RESULTS

Allergan empowers marketers to build more effective, customer-centric campaigns with Segment – a tool that doesn’t require SQL and that teams enjoy using. Segment helped Allergan improve engagement with prospects in the market for Botox, increase new loyalty members by 1 million, and attribute \$250M in new revenue to direct-to-consumer campaigns and personalization.

[Read the full customer story](#)

“Since we turned our attention to consumers, we have over 1 million more loyalty users and we’ve generated about \$250 million in provider revenue. That’s all attributed to the personalization that Segment made available to us.”



Tory Brady

Executive Director, Product, Engineering & Data,
Allergan Data Labs



USE CASE

Optimize campaigns and lifetime value.

INDUSTRY

Financial Services

HEADQUARTERS

USA

CHALLENGE

The Motley Fool was using a data platform that couldn't distinguish between prospects and existing paying members at scale. As a result, some premium members were being included in customer acquisition campaigns which made ad spend less efficient.

SOLUTION

The Motley Fool implemented Twilio Segment to create a complete and real-time view of the customer and easily personalize the customer journey.

RESULTS

By switching to Segment, The Motley Fool was able to more accurately target paid ad campaigns to decrease cost per acquisition, increase retention and lifetime value with personalized experiences, and improve operational efficiencies.

[Read the full customer story](#)

“Segment is much more of a self-service platform. Whereas before we were limited in how we could message or target prospects and members, we can now build and activate audiences almost immediately.”



Nate Wallingsford

Head of US Marketing Operations and Optimization, The Motley Fool



USE CASE

Optimize campaigns and lifetime value.

INDUSTRY

Travel

HEADQUARTERS

USA

CHALLENGE

Vacasa was looking for new and innovative ways to engage with its customers, while at the same time optimizing marketing spend for its campaigns.

SOLUTION

Vacasa turned to Twilio Segment and SendGrid to develop an intelligent customer engagement strategy that encompassed personalized messaging across email and SMS channels.

RESULTS

Personalizing marketing campaigns using data streaming through Twilio Segment increased engagement rates and resulted in a 3x increase in guest bookings from email campaigns.

[Read the full customer story](#)

“We don’t want our guests to remember a family vacation for that one thing that went wrong. We want to help guests make great memories, so our platform solves any need that might arise either before, during, or after their trip – making sure they have a smooth booking experience.”



G Scott Stukey

Director of Marketing Analytics, Vacasa

SHIFT

USE CASE

Optimize campaigns and lifetime value.

INDUSTRY

Consumer Products

HEADQUARTERS

USA

CHALLENGE

Shift struggled to effectively engage customers due to data silos, non-integrated systems, and manual processes. Shift needed to improve email personalization to strengthen long-term customer engagement and grow its business.

SOLUTION

Shift implemented Segment to unify and centralize data and better engage customers. Using Segment and Iterable, Shift replaced generic emails with personalized subject lines and content.

RESULTS

Shift's personalized email marketing strategy increased email open rates by 50% and delivers a seamless customer journey that fuels customer engagement and growth.

[Read the full customer story](#)

“For us, what’s most important about Segment are the integrations. Now we’re able to move beyond just basic emails to individualized journeys based on custom events.”



Eva Wei

Growth and Analytics Lead, Shift

About Twilio Segment

Twilio Segment is the leading CDP with more than 450 pre-built integrations to different data sources and destinations. Our platform provides thousands of marketing teams with the data foundation they need to put their customers at the heart of every decision.

Using Segment, marketing teams can collect, unify, and activate their customer data in any system where it's needed to better understand their customers and create seamless, compelling experiences in real time. Over 25,000 companies, including Intuit, FOX, Instacart, and Levi's use Segment to make real-time decisions, accelerate growth, and deliver world-class customer experiences.

Together Twilio and Segment can engage consumers across every digital channel, from SMS to voice to email and more, allowing businesses to tap into the full power of all their customer data, with access for marketing, engineering, product, sales, customer service and data teams.

Schedule a demo to learn how to get the most out of your customer data with Twilio Segment.



Recommended reading



The Definitive Guide to Customer Data Platforms

Learn what a customer data platform is and how it can help your team in this in-depth overview of the customer data platform industry to date.

[Download the guide >](#)



7 Ways to Use AI to Superpower Your Marketing Strategy

Read how AI-driven marketing can revolutionize customer interactions, paving the way for smarter and more efficient customer engagement.

[Download the guide >](#)



Real-Time Data, Real Cost-Savings

Learn how real-time, personalized communications can help marketing teams build relationships that resonate and keep customers coming back.

[Download the guide >](#)



Thanks for reading



If you would like to learn more about what Twilio can do for your business,
please [contact the Segment sales team](#).