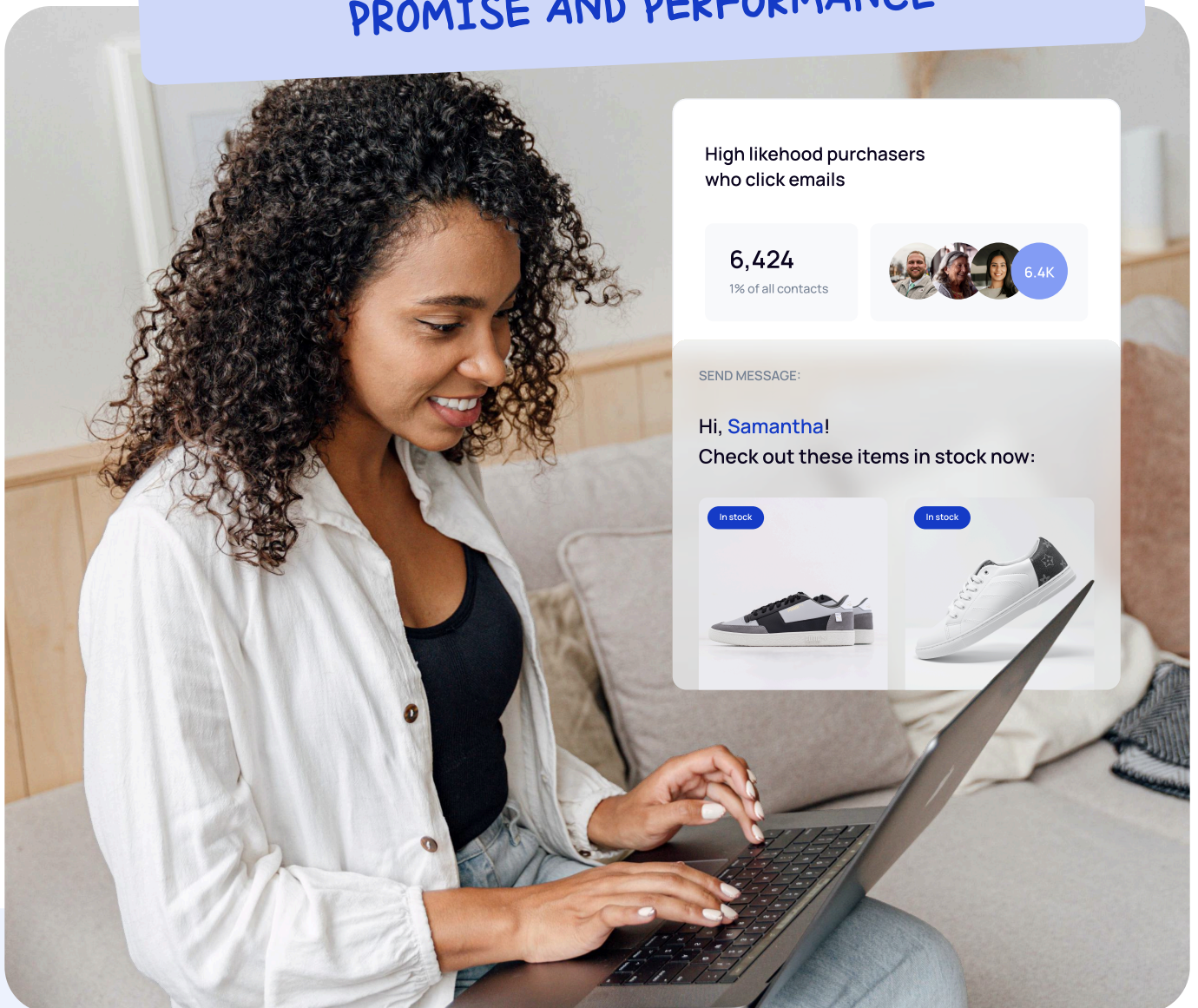


# CDP Buyer's Guide: 2025 Edition

BRIDGING THE GAP BETWEEN MARKETING  
PROMISE AND PERFORMANCE



# What to expect from this guide

This buyer's guide isn't just another CDP sales pitch — far from it. We'll dive deep into CDP capabilities, use cases, and how they fit into the modern marketing stack. But we're taking a critical step back to look at the complete picture of what truly drives successful customer marketing.

CDPs promised to revolutionize marketing with unified customer data and seamless personalization. But despite significant investments, most companies still can't deliver genuinely personal customer experiences.

Instead of solving problems, traditional CDPs created new ones: data silos, technical complexity, and mounting costs when implemented without the right foundation.

This complete CDP Buyer's Guide gives you insight into what actually works. You'll learn:

- Why CDPs need proper support to deliver ROI
- How to build the right mix of strategy, people, and tech to deliver 1:1 marketing
- How to evaluate and choose the right tech partners to deliver customer lifetime value

Whether you're evaluating your first CDP, looking to maximize your existing martech investments or have a CDP that isn't quite working out the way you intended, we want to help you build the proper foundation to deliver lasting results.

While a CDP can be a powerful tool, it's just one part of a larger transformation that requires careful planning and organizational capabilities.

**Our approach challenges the traditional reliance on a single platform and focuses on blending strategy, people, and technology to drive truly impactful customer marketing.**

Let's talk about how to get it right.

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Remember when CDPs seemed like the answer to all our customer data dreams? A single platform that would finally let us deliver those perfectly personalized experiences to every customer, every time.

But here we are in 2025, and most companies still struggle to create truly personal customer experiences despite significant investments in CDP technology. The hard truth?

**A CDP alone isn't enough.**

When CDPs were created, they offered a huge promise to the market and to marketers. If all your customer data is in one place, you can create more successful marketing campaigns and programs. Today, almost 12 years after the CDP category was first named, the need to drive successful campaigns and programs is more important than ever.

The data lays out a clear case. Companies that [master 1:1 personalization drive 40% more revenue than their peers](#). And the stakes keep getting higher — [75% of American consumers now say they're more likely to be loyal to brands that understand them on a personal level](#).

## So why have traditional CDPs fallen short?

Instead of focusing on better marketing, they've created fragmented data systems, complex implementations, and rising costs that rarely justify the investment. For most organizations, CDPs have become another data silo rather than the unified solution it was promised to be.

### 01. Customer data is still scattered

Sure, most CDPs claim to create unified customer profiles. However, for many companies, customer data is created and stored in various systems across marketing, sales, and customer service. [Sometimes, in an attempt to centralize that data, it goes to a data warehouse](#). Yet, the reality is that so many systems still need to access customer data that adding a legacy CDP often just creates another data silo.

### 02. Customer marketing is more complex than anyone anticipated

What started as a marketing initiative to improve results quickly became an IT investment project requiring specialized skills and significant resources.

Many CDPs like Salesforce, Adobe, Segment, and Hightouch require you to be equipped with the right technical resources, martech stack, and integration capabilities to ensure you get the most out of your new tech. This doesn't mean a platform that requires technical resources is necessarily bad; it just means there's often a significant impact on your resources.

For example, the hidden costs can pile up, thanks to service fees from implementation, maintenance, training, and constant updates.

And that is just on the technical side. Most organizations still don't have the internal resources to connect their marketing strategy to their data strategy, leaving many use cases the CDP was meant to support off the table and disconnected from the company's strategic vision.

### 03. Integration challenges

The average enterprise uses over 12 martech tools. Getting your tools to play nicely together requires help maintaining deep, bidirectional integrations with this ever-growing ecosystem, which can lead to data latency and synchronization issues. Understanding what data needs to go where and when is beyond most connectors' ability and requires expertise to untangle the martech web.

### 04. Higher costs that don't justify ROI

Beyond platform fees, organizations face substantial costs in implementing their martech stack, such as:

- Implementation and integration services
- Ongoing maintenance and updates
- Training and headcount requirements
- Data storage and processing fees
- Strategic services

But there's a revolution coming — a radically better way to deliver personalized customer experiences. And it starts with rethinking everything we know about customer data platforms.



# The promise of modern customer marketing

Now that we've painted the grim reality of traditional CDPs, let's look at what's truly possible when modern marketing is done right. When your business, customer data, and technology align, enterprise marketing transforms from scattered campaigns to revenue-driving, personalized customer experiences. Here's what becomes possible.



1

## Real-time personalization that drives growth

What if you could instantly recognize anonymous or high-value customers browsing your site, automatically tailor their customer journey based on their purchase history, and seamlessly coordinate messages across email, mobile, and ads? Modern CDPs make this possible by building Customer 360s and connecting customer signals to immediate action.



3

## Experiments that scale automatically

Your marketing workflows should empower marketers to experiment and optimize your brand's messaging. With the right strategy, you can test different messages, offers, and journeys across segments to see what resonates best. Then, your martech stack helps you scale winning customer experiences across channels



2

## Predictive insights that unlock revenue

Rather than reacting to past behavior, you can anticipate customer needs – ranging from identifying customers who are likely to churn so you can intervene early or spot cross-sell opportunities before your customers know they need them.



4

## Marketing that drives customer lifetime value

Track complete customer journeys, measure campaign impact across channels, and prove how personalization directly increases retention and lifetime value. In a world of shrinking marketing budgets and rising customer expectations, this alignment delivers what matters: measurable ROI and stronger customer relationships.

# The path forward to 1:1 customer marketing



Driving LTV = Personalized customer marketing = A fundamental shift in 2025

Personalized customer marketing in 2025 and beyond [requires a fundamental shift in approach](#). Rather than seeking a silver bullet solution, marketing teams must build their modern customer marketing program on three interconnected pillars: strategy, people and processes, and technology.

Here's what we mean.



## The strategy to achieve personalized customer marketing

The first step to success with a CDP is to build your customer marketing and data strategy. Often, organizations see a gap in their existing marketing strategy that isn't delivering the desired business results.

Marketers feel the symptoms of a poor strategy: customers are harder to find or understand, existing customers are buying less – and you don't often know why – and you can't answer the questions your team is getting about how to fix it.

But what comes next is the biggest mistake brands make: shiny object syndrome. Often, companies start shopping for technology to solve this problem without understanding the right business goals and the customer data needed to support those goals.

When all you have is a hammer, everything looks like a nail. Instead, approach 2025 by:

1. Defining your [business goals and what it will take to hit those objectives](#)
2. Aligning your customer data plans to those objectives by examining [what data is needed, what exists today, and most importantly, what is missing](#)
3. Using this information as a foundation to inform and [update your campaign strategies](#), use cases, and to determine what customer experiences you need to invest in to drive the desired outcome

While many organizations have pieces of this work in place, align as a team before approaching vendors. If you're not aligned, [consider finding a vendor \(like Simon Data!\) to help establish this foundation](#) before implementation begins.

## The core business objectives

Modern marketing boils down to three simple but essential strategy areas:



### Drive attention

Reaching the right prospect at the right time with a message that resonates



### Convert attention into revenue

Turning interest into action with [personalized messaging across all channels](#)



### Retain and grow customer lifetime value

Building relationships with customers to [increase purchase frequency, drive higher order values, and create brand advocates](#)



In reality, it's impossible to work on all three areas simultaneously. Most often, a brand knows which area to focus on based on its current business needs and goals, which goes a long way toward helping frame and focus its strategy.

## The objectives define the data foundation

The [data foundation](#) you will build needs to map directly to your core business objectives.

You should track engagement metrics across channels, capture interaction history and channel preferences, and monitor content performance and response rates to drive attention.

To convert attention to revenue, unify customer profiles across touchpoints, track purchase intent signals, and connect marketing activities to conversions.

If you're [focused on growing CLTV](#), measure purchase frequency and order value, monitor loyalty program engagement, and track customer service interactions while continuously optimizing your marketing campaigns.

If you lack data in any of these areas or have blindspots that could prevent you from turning your customer data into revenue, [many AI options are available](#) to help you unlock insights.

## Trust, accuracy, and compliance in customer data

### Trust in data

Before we talk about understanding customer data, let's talk about trusting it. Teams must work from a single source of truth (SSoT) — such as a Cloud Data Platform like Snowflake. For marketers, this means trusting data to drive decisions and fuel creative strategies. Here's why it's important to ensure you have compliant, safe, and accurate data.

#### **Reason 1: Meet customer expectations**

Customers now expect brands to understand their history and preferences. A CDP connects individual interactions into meaningful patterns, revealing the full customer journey in ways fragmented data systems cannot.



### Reason 2: Revenue impact and personalization at scale

Without real-time data coordination, marketing teams risk targeting converted customers with misaligned messages. Unified customer data enables accurate campaign measurement and efficient budget allocation while powering personalized interactions. Understanding customer context through data helps deliver relevant experiences that build lasting relationships.

### Reason 3: Privacy & compliance

Siloed data increases compliance risk. Your CDP must stay current with GDPR, CCPA, and SOC-2 requirements, update customer preferences across all channels instantly, manage consent and privacy settings automatically, and enable innovation while maintaining compliance.

A composable CDP handles these requirements behind the scenes so marketers can focus on creating value from their customer data.

While establishing trust in your customer data and ensuring compliance are critical first steps, they're just the beginning of your personalization journey. You need the proper organizational foundation to transform this trusted data into meaningful customer experiences.

Let's dig into the essential resources, team structures, and processes that will help you deliver exceptional personalized marketing at scale.

## The resources you need to deliver exceptional customer marketing

Delivering a personalized marketing experience at scale isn't a one-and-done process — you need the right mix of people, processes, and measurement frameworks, plus [the ability to experiment and evolve](#).

In our experience, three essential elements support exceptional customer marketing:



### Team structure and capabilities

The right mix of talent and expertise to execute 1:1 marketing



### How teams work together

The processes and workflows that enable streamlined execution



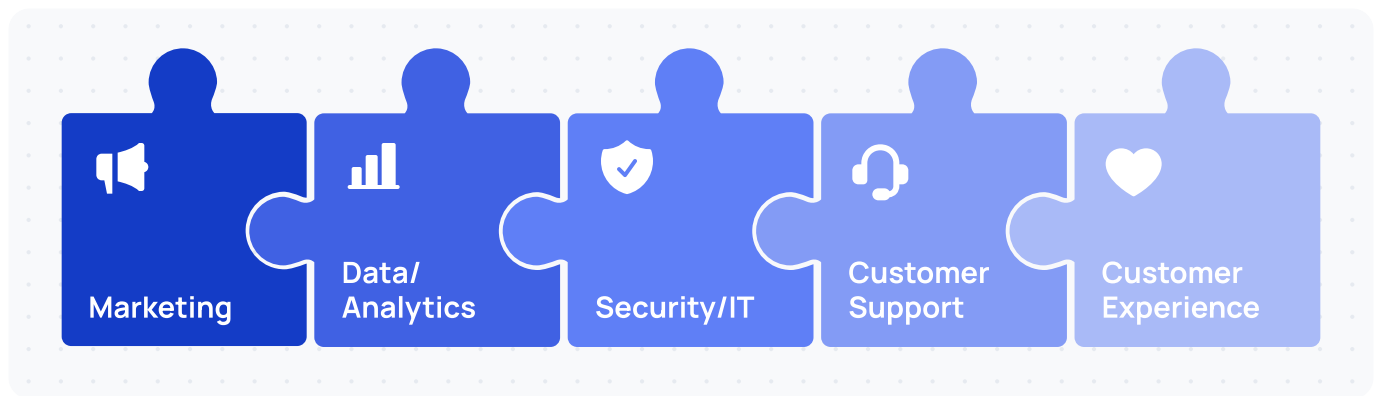
### Successful measurement

The metrics that demonstrate impact and guide learning and improvement

## The right marketing team structure and capabilities

Creating memorable customer experiences starts with building a great team. Beyond technology, you need marketing leaders who [understand customer journeys](#) and data, [campaign managers who can create personalized experiences](#), and analysts who [optimize marketing performance](#).

### The core team partnerships needed for CDP success



- ✓ **Marketing:** Drives strategy and execution of personalized campaigns
- ✓ **Data/Analytics:** Ensures data quality and builds predictive models
- ✓ **Security/IT:** Provides technical implementation, integration support, and compliance oversight
- ✓ **Customer Support:** Offers frontline insights about customer needs
- ✓ **Customer Experience:** Designs and optimizes end-to-end customer journeys while ensuring consistent brand interactions across all touchpoints

Not all teams have to look or operate the same, but you should be able to identify teams involved in the process and any resource gaps where you might need additional support. This can come from in-house experts, contractors, or by leveraging service experts like Simon when you have expertise and resource gaps.

### How cross-functional teams should work together

Once your team is in place, you need efficient processes to execute customer marketing at scale. Strong operational models ensure your CDP investment translates into actual results.

While models will differ for each business based on where they operate, how they are structured, and even what vertical they are in, some common elements span businesses and serve as a starting point for your planning.

Operational requirements for CDP success:

- Clear data governance policies and ownership
- Agile campaign workflows for rapid testing and iteration
- Defined collaboration processes between marketing and technical teams with SLAs and SOPs in place
- Documentation of key processes and best practices
- Honesty without retribution about where current roadblocks or barriers exist so they can be improved

### Cross-team collaboration

The most successful organizations break down silos between teams by establishing:



#### Daily operations

Regular syncs between marketing and data teams, shared project management tools, and clear roles for campaign execution help maintain momentum.



#### Communication channels

Create direct lines of communication between teams for strategic planning and urgent troubleshooting. Quick response times are critical for maintaining personalization at scale.



#### Review cycles

Schedule regular campaign performance reviews, data quality, and process efficiency. These check-ins help identify bottlenecks and opportunities for improvement.

Even the best CDP will only drive results when it has strong operational processes behind it. Focus on building workflows that empower teams to move quickly while maintaining quality. Your CDP should make these workflows and processes more manageable, often empowering teams to do more work in less time than previously, even when adding additional syncs and meetings.

## Measuring marketing success at scale

You can't manage [what you don't measure](#). Before investing in any technology, set clear metrics you plan to influence that support your business goals.

## 01. Business impact

Track metrics that impact the bottom line: customer lifetime value, retention rates, and revenue per customer. These directly show the ROI of your personalization efforts.

## 02. Marketing performance

Monitor campaign performance through [customer acquisition costs](#), channel-specific ROI, [cross-channel engagement rates](#), customer behavior, and conversion rates. You should also analyze segmentation effectiveness.

## 03. Customer experience

Measure the quality of your personalization efforts with Net Promoter Score (NPS), customer satisfaction, channel preference adoption, engagement rates, and response rate metrics. These indicators ensure you're delivering experiences that resonate with customers.

Your martech stack — and, specifically, your CDP — investment should make measuring, improving, and experimenting with these metrics easier.

Delivering [a memorable customer experience](#) requires three essential elements: skilled teams who understand both marketing and data, metrics that demonstrate impact, and smooth workflows that enable rapid execution.

# The technology marketers need to personalize the customer experience

To deliver personalized customer marketing, marketers need three core technologies: a cloud data warehouse to store and update real-time customer data, a CDP to unify and activate customer data, and a martech stack to deliver segmented, personalized marketing to your customers. Let's discuss.

## A customer data platform (CDP) to activate customer data

Because this is a CDP buyer's guide, we must spend time on the technology and [its top use cases](#). If you're unfamiliar, a CDP is software that [unifies customer data from every channel into actionable profiles](#). Unlike other martech tools, it serves as the bridge between your marketing systems, your enterprise data, and other repositories like a [data warehouse](#).

A CDP must:

- Ingest customer and non-customer data from multiple sources
- Not force you into a fixed data model that limits your ability to ingest data
- Create unified customer profiles based on your specific business requirements
- [Enable dynamic segmentation](#) using a combination of attributes and behavioral signals
- Integrate with existing systems and allow you to change systems in the future



A key value is empowering marketers to directly access and activate customer data without relying on engineering teams. This removes the technical bottleneck that typically slows down personalization and campaign execution.

When connected to your existing data sources, a CDP transforms raw, real-time customer data into revenue-driving insights that marketing teams can act on immediately.

At a basic level, all modern CDPs must offer these core competencies:

### 1. Data management

A CDP must ingest data from all sources — [digital, offline, zero-, first-, and third-party](#) — while handling real-time streams and batch processing. When combined with a cloud data platform, it should validate and clean data automatically, scaling seamlessly as your data volume grows.

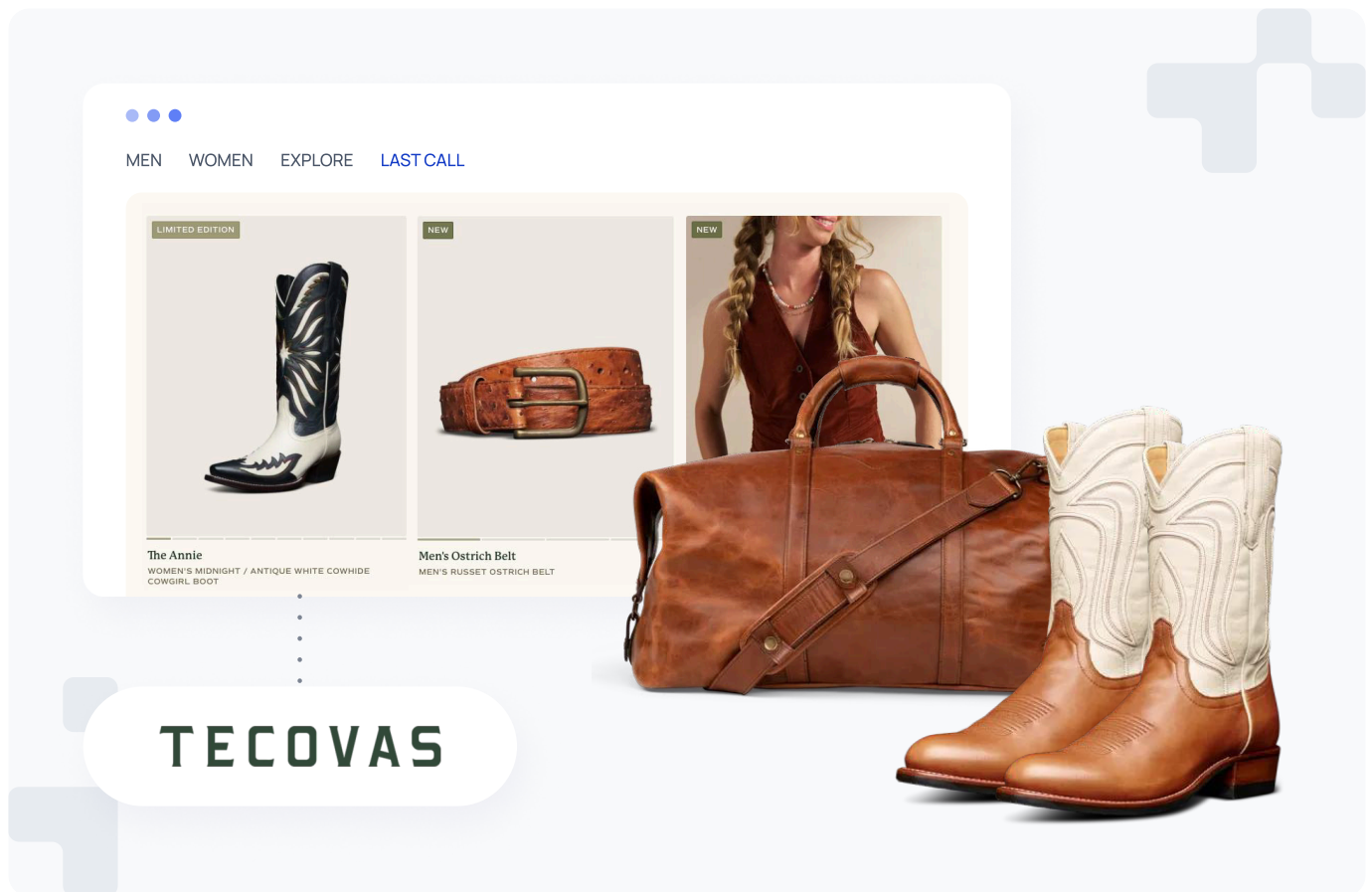
### 2. Profile unification

A CDP must match identities across channels and devices, resolving duplicates into a [Customer360](#). These profiles should update in real-time as new data flows in to maintain an accurate picture of each customer's journey. Some CDPs just focus on matching and cleaning records, but for true personalization, you need a CDP that offers [identity resolution](#) and can:

1. Link customer identities across channels, devices, and browsers in real time
2. Connect anonymous to known user behavior
3. Handle complex identity relationships
4. Enrich profiles automatically
5. Connect identity data directly to campaign activation

**Remember:** ROI-driven campaigns require access to accurate customer identities to create personalized experiences.

## Tecovas: Converting anonymous shoppers into revenue



Western retailer Tecovas couldn't identify website visitors unless they were logged in. This limited their ability to reengage anonymous shoppers who abandoned their cart, resulting in missed revenue opportunities. After implementing Simon Data's Identity+ solution, they identified and reengaged anonymous shoppers at scale, driving a **370% increase in abandoned cart revenue** and **expanding audience reach by 83%**.

"We already had these campaigns running. With Identity+, it's really what we've captured from an additional volume perspective that's been the most impressive."



Megan Edwards

Senior Manager of CRM at Tecovas



### 3. Segmentation and activation

Marketers should be able to build and test segments without SQL knowledge, using predictive modeling and AI to identify valuable audiences. These segments should activate instantly and seamlessly across your marketing channels to turn insights into action.

### 4. Enterprise-level integration

The CDP must connect smoothly with your existing tech stack, maintaining bi-directional data flows and supporting real-time API calls. It should adapt to your custom data models rather than forcing you to change your architecture. While there is no way to know future data needs, you should be able to add and remove data sources easily and safely without a fixed data schema in the CDP.

### 5. Service & support beyond technology

Look for a CDP partner who understands your marketing goals and provides implementation expertise and ongoing strategic guidance. They should demonstrate a clear ROI methodology and maintain robust data security practices. Moreover, they should be able to support you beyond the initial implementation.

Services should support you throughout the contract lifecycle based on your needs and goals. If a vendor's services are done after a speedy implementation, consider how you plan to manage the platform and new and ongoing initiatives.

#### Need help turning customer data into marketing revenue?

Many brands have customer data but need more time and resources to turn it into action. Simon Data's [Lifecycle Services](#) combines powerful AI with expert resources and guidance to:

- ✓ Connect strategy to campaigns
- ✓ Accelerate campaign execution
- ✓ Implement advanced targeting & personalization
- ✓ Drive measurable results

### Questions to ask your CDP vendor

Selecting the right CDP requires asking pointed questions that reveal true business value. Ask vendors if their CDP can:

- Enable marketers to build and launch campaigns without engineering or technical support?
- Deliver a Customer360 that automatically updates across channels?
- Enable instant campaign adjustments based on customer behavior?
- Support rapid testing of audience segments and campaign strategies while encouraging marketing experimentation?
- Identify and capture revenue opportunities that would otherwise be missed?
- Show you something about your customers that you previously didn't know?
- Demonstrate measurable improvements in customer retention and lifetime value from other clients?

A CDP should enable you to understand and relate to your customers, enabling you to build personalized customer relationships at scale quickly. It should also allow you to create offers and opportunities that align with your customer's preferences, even [predicting what they might need or want in the future](#).

Ultimately, your CDP should help create personal experiences that make your customers feel emotionally connected to your brand with a "They really do know me!" feeling.

A great CDP empowers marketers to experiment with their data, try on different assumptions, and play around with how tweaks to a customer segment could change the outcomes.

**Remember: the real test of a CDP isn't just its feature list – it's how quickly marketers can turn customer insights into revenue-driving campaigns.**



## Cloud Data Warehouses or Cloud Data Platforms

Cloud data warehouses (CDWs) are cloud-based databases that store valuable data from nearly every part of the business, including first-party customer data. The adoption of CDWs continues to accelerate and most organizations have some form of CDW today. While they are excellent repositories of enterprise data, including customer data, they have some drawbacks.

CDWs were primarily constructed as a business intelligence tool, and access to the data is often limited to IT, engineering, or other technical gatekeepers. Think of your CDW as your dad's garage. It's entirely chock full of valuable stuff, and a total mess – rendering it impossible for anyone who's not him to find anything quickly.

While CDWs store massive amounts of customer data, they must be built for marketers to use directly. This is where CDPs come in to bridge the gap by connecting directly to your CDW to:

- Give marketers easy access to safe, accurate customer data
- Keep your CDW as your single source of truth
- Activate data without creating copies
- Update customer profiles in real time

The key is choosing a CDP that works with your data architecture, not against it. When your CDP and CDW work together correctly, every team, from marketing to customer service, can instantly access and act on customer insights while maintaining compliance and security for dealing with sensitive data like Personally Identifiable Information (PII).

Simon Data was recently cited as a “game-changer” in Snowflake’s recent [Modern Marketing Data Stack Report](#). The report cited Simon’s Connected Customer Data Platform for its ability to tap directly into the data cloud to help enterprises craft tailored customer experiences. Simon’s customers, including brands like 1-800-Flowers, WeWork, and Vimeo, are achieving personalization at scale.



## The CDP “alternatives”

Today’s marketing demands highly personalized experiences across all channels. While legacy tools each solve specific problems, they fail to deliver true end-to-end personalization. Here’s how CDPs compare to existing solutions.



### Data Management Platform (DMP)

#### *How they differ from CDPs*

[A DMP can play a role in centralizing and organizing customer data to make it usable](#). However, they have a narrower focus on anonymized third-party data specifically for managing paid digital advertising and marketing platforms. CDPs focus on first-party data that can use personally identifiable

information (PII) for marketing functions. While many marketing cloud vendors still offer some variation of a DMP, some are being sunsetted and discontinued.

### ***How they work with CDPs***

CDPs deliver on all the promises DMPs made. CDPs can push audiences with customer PII (name, email, phone, etc.) to DMPs to pass to demand-side partners (e.g., advertisers). If customers click on downstream advertisements, a CDP will ingest that data for further segmentation and analysis.



## **Customer Relationship Management tools (CRM)**



### ***How they differ***

CRM tools were designed for sales and services to track direct customer interactions (e.g., purchases and customer service communications). While CRM tools have their strengths, they generally work only with limited data and lag in automation capabilities. This can create the need for marketers to do manual work, which is disconnected from other campaign activities.

### ***How they work together***

CDPs can push audiences to CRM tools for downstream management. CDPs can also ingest data from CRM tools to support audience segmentation and personalization.



## **Multi-Channel Marketing Hubs (MMH)**



### ***How they differ***

Multichannel Marketing Hubs (MMH) are often ESPs (email service providers) with added functionality. However, these systems specialize in managing and deploying marketing campaigns to end channels, like email, social media, or SMS. MMHs can't match a CDP's ability to unify data across the marketing tech stack. Legacy MMHs typically rely on batched FTP-based data integration. In contrast, newer MMHs rely solely on an event-based data model, which doesn't support complex manual aggregations of customer properties with all new events/attributes.

### *How they work together*

CDPs can push audiences to MMHs to trigger downstream messages. CDPs can also ingest data from MMH tools to support audience segmentation and personalization. A CDP can replace data and campaign orchestration that an MMH owns in many situations. However, a CDP still relies on end channels to push messages.



## Reverse Extract Transform Load (Reverse ETL)

### *How they differ*

[A reverse ETL tool](#) aims to take data from your data warehouse and send it back to business intelligence, marketing, sales, and operations tools. This process then makes customer data actionable. At first glance, Reverse ETL is the perfect solution for completing your data stack. You have a warehouse that stores data and now a solution that moves data back and forth to your tools.

However, Reverse ETL does not provide an interface to activate data into personalized, cross-channel customer experiences. This gap is where a CDP comes into play, presenting an opportunity for Reverse ETL and CDP to complement each other.

### *How they work together*

Reverse ETL and CDPs may have overlapping functionality but can complement one another.

While many CDPs have built reverse ETL functionality into their data management system, the best go further. Orchestration CDPs activate data through identity management and cross-channel orchestration in marketer-friendly workflows. Today, modern CDPs include AI-enhanced workflows to drive even better data-driven insights, learning from your marketers what workflows are needed and optimizing them.



## Data Warehouses

### *How they differ*

Data warehouses act as a centralized repository for storing all your structured and unstructured data at scale. If you are not a trained data-handler, data repositories are scary, complicated places.



### *How they work together*

CDPs can share all customer data with a client's data repository.

## What value will a CDP bring to your business?

You can expect the following outcomes from your CDP:

- Increased operational efficiency for the business
- Increased revenue
- Improved customer lifetime value
- Reduced media spend
- Streamlined technology costs

Let's drill into each of these.



### Increased operational efficiency

CDPs break down the wall between marketing and engineering. Marketers gain direct access to customer data through intuitive interfaces, enabling rapid campaign deployment without technical bottlenecks. This frees data teams to focus on strategic initiatives like advanced analytics and attribution modeling. Customers have told us they would have to hire more staff if they no longer had their CDP.

### Revenue growth

By democratizing data access across teams, CDPs enable faster, more targeted campaign development. Deep customer insights drive personalization, boosting loyalty, retention, and lifetime value. Marketing teams can quickly identify and act on opportunities to increase purchase frequency and order values.

### Improved customer lifetime value (CLTV)

A CDP enables true 1:1 personalization by unifying customer data to deliver tailored experiences based on individual preferences, behaviors, and purchase history. This [drives significant CLTV improvements through higher repeat purchase rates, increased average order values, stronger brand loyalty, and reduced churn.](#)

Leading brands using CDPs for advanced personalization see a significant increase in customer lifetime values by creating truly personal experiences.



## Reduced media spend

With media accounting for a third of marketing costs, CDP automation delivers significant savings. Real-time suppression lists prevent wasted ad spend on converted customers, and smarter audience targeting [improves return on ad spend \(ROAS\) across owned and paid channels](#).

## Streamlined technology costs

Modern CDPs reduce overall martech costs by eliminating redundant tools and streamlining workflows. A composable CDP approach lets you start with core capabilities and add functionality as needed, optimizing spend while maintaining flexibility for growth.

Choose a CDP with usage-based pricing that aligns with your business outcomes for maximum impact. This ensures you only pay for your needed capabilities while maintaining room to scale.

# How to evaluate and select the right CDP

With dozens of vendors claiming to be CDPs, choosing the right platform for your business can be overwhelming. Each has different strengths, capabilities, features, and ideal use cases — making [direct comparisons challenging](#).

### Need help comparing Simon Data against other CDPs?

Visit our comparison pages for the most up-to-date features, capabilities, and analysis of key differentiators.

 Simon vs  hightouch

 Simon vs  twilio segment

 Simon vs  salesforce

Beyond feature checklists, selecting the right CDP requires a strategic evaluation process focused on your specific needs. Focus your evaluation on the following:

## Use cases

This should be the starting point for all evaluation decisions. How do you plan to use the CDP to support your goals, and more importantly, how are you doing those today? If there are things you can't do today, but know you need to, document them as well.

Be realistic about your organization's ability to execute the use cases because that will give you a more realistic picture of what you need the vendor to support and where possible gaps may exist.

### Data management

CDPs should excel at data ingestion, access, and profile unification. The platform should seamlessly collect and standardize data from all sources into a unified customer profile. Be specific about the types of data you have today.

While it's important to plan for the future, don't evaluate based on all the potential future possibilities or you risk getting bogged down in details that won't impact the project.

### Analytics and intelligence

Look for platforms that accelerate decision-making through sophisticated segmentation, experimentation, predictive modeling, and AI. Ensure non-technical users can build segments and analyze data independently.

Identify the insights you cannot access today through tools like BI. Often, organizations find that they have many necessary BI tools but can't provide the analyst with the right data to surface the right details.

### Omnichannel orchestration

Your CDP should provide a single interface for understanding and activating customer data. Through native CDW integration, it should enable consistent messaging across channels without overwhelming your customers.

### Privacy, security, and compliance

As privacy regulations evolve and third-party data access decreases, choose a CDP vendor committed to maintaining compliance with GDPR, SOC 2, and CCPA standards. Consider how they handle data retention and consumer privacy rights.

It is also important to note that if your CDP vendor maintains data inside their own data store instead of working directly with a Cloud Data Warehouse, you'll have additional security risks involving data residency and data in transit.

### Marketer empowerment

Your platform should offer a no-code interface that lets marketers create and deploy campaigns without technical support to remain competitive and deliver the personalization customers expect.

There is no universal standard for functionality when evaluating CDPs. Remember to create precise requirements based on your needs and ensure vendors demonstrate how they'll meet them.

## Choose your winning CDP

Your journey to implementing the right CDP requires a clear strategy and strong alignment across your organization. While multiple teams will be involved, marketing should own and drive this process – they're the ones who will use the CDP to deliver results.

## ✓ Step 1: Build your CDP evaluation buying team

[Marketing leadership should spearhead the evaluation process](#), particularly teams responsible for campaign execution and measurement. However, selecting the right CDP requires diverse perspectives. Essential stakeholders include:

### Data engineering

For data infrastructure and integration requirements

### IT

For system architecture and implementation planning

### Security/Compliance

To ensure data privacy and regulatory compliance

### Legal

For vendor contracts and data usage agreements

### Analytics

To validate reporting capabilities and data accuracy

### Procurement

To manage vendor evaluation and negotiations

## ✓ Step 2: Surface pain points

Have each stakeholder identify their key challenges with data usability. Common issues include:

### Common challenges for marketers

- We don't know how to turn data into outcomes
- We don't have a single view of our customers
- We don't know who our customers are
- We can't create segments quickly
- We can't effectively experiment across channels

### Common challenges for technical teams

- We struggle with focusing on our department's initiatives because other functions rely on ad hoc or ongoing support
- Our data infrastructure can't handle analytical and operational workloads
- We struggle to test our analytical or data science models
- If we are to prioritize high-leverage internal projects, we must reduce integration pain and level of effort

## ✓ Step 3: Find common ground

Identify where these challenges intersect. Marketing's revenue-driving use cases often stem from technical infrastructure limitations, while IT's challenges directly impact marketing's execution ability. Understanding these connections helps build a stronger business case for a marketing-owned CDP that addresses both technical and business needs.

## ✓ Step 4: Prepare for a data audit

Before engaging with CDP vendors, conduct an internal assessment of your customer data landscape. This preparation will help you identify gaps and ensure you choose a CDP that aligns with your data maturity and marketing goals while enabling you to scale.

Key areas to evaluate:

- Data sources
- Identity resolution
- Integration status/capabilities
- Data quality
- Data governance
- Data access

### Need help evaluating CDPs?

We've created an [RFP template](#) to make it easier for you.

## Unlock your CDP's full potential

In addition to marketer empowerment (i.e., happiness!), better and swifter campaigns, improved operational efficiency, and less dependence on data engineering, life with a great CDP will drive these important processes.

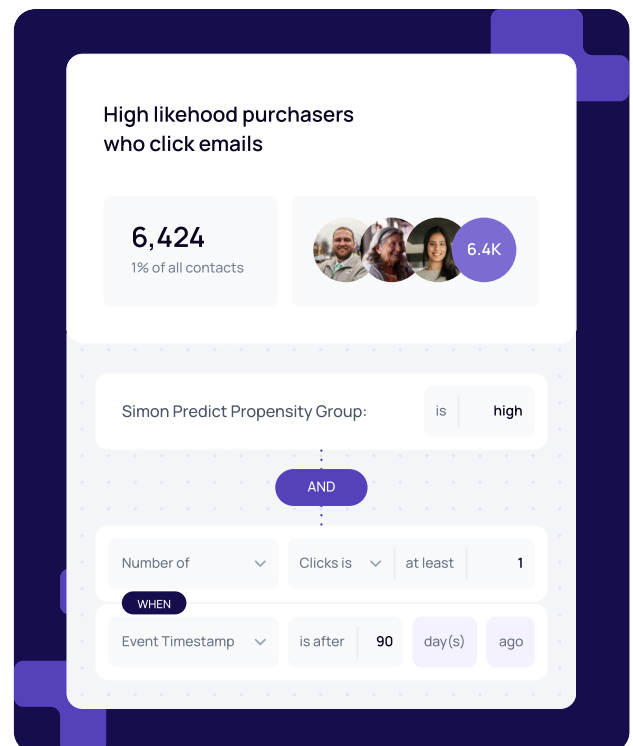
### Building segments faster than you can think

Think of all the tests you could run if segmentation weren't slow and inconvenient. Such testable segments might include:

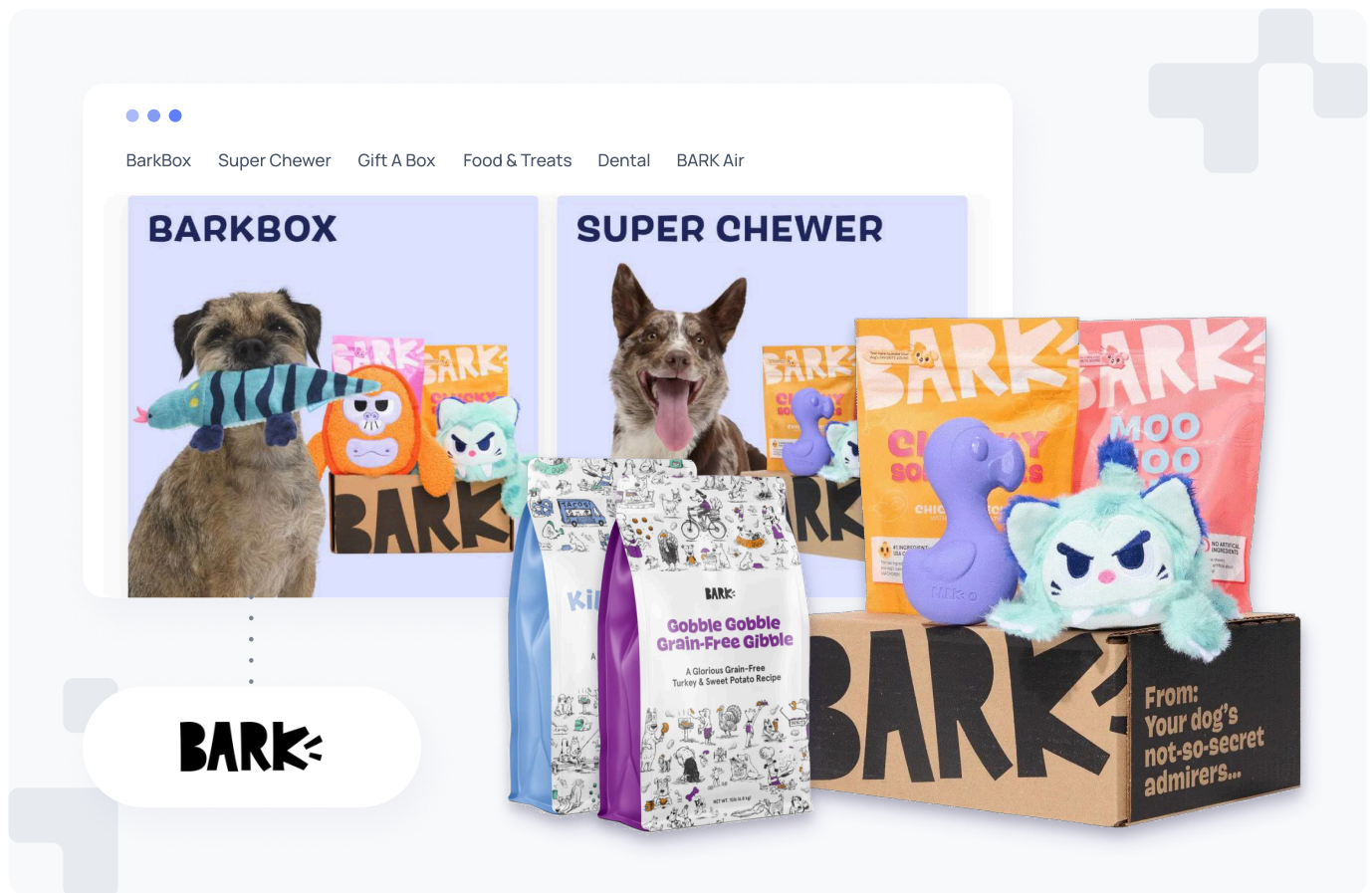
- Customers who purchased yesterday then called customer service with a complaint
- Customers who bought two weeks ago and have browsed an adjacent product category in the past hour
- Customers who purchased one month ago and also opened an email or a push promo since that purchase

Who will convert most quickly? Who converts most reliably? These tests could inform your follow-up cadence and significantly impact revenue, loyalty, and LTV.

[Segmenting your customers](#) should be intuitive with a CDP. Suppose you have an idea for testing cohorts or segments against each other. With a CDP, this can be executed quickly and without committing to marketing spend. To learn more about self-service segmenting, [check out our guide](#).



## BARK: Transforming pet marketing with hyper-personalized segmentation



BARK struggled with manual data processes until implementing Simon Data's CDP. Now they create hyper-personalized campaigns for millions of dog owners based on pet-specific data like allergies, age, and size. The results? **Add-to-Box revenue grew from \$1.1M to \$40.8M, while saving 2.5 hours per campaign.**

"Simon makes testing, learning, segmenting, and customizing so much easier. Now we can click, click, click and get a custom email out."



Kristen Elmer

Sr. Director of eCommerce Sales at BARK



Adding AI to the CDP has unlocked multiple additional use cases that can help marketers move faster and remove data blindspots in a manner that wasn't possible before. But it takes more than just adding a simple AI Co-pilot that allows you to chat with your CDP.

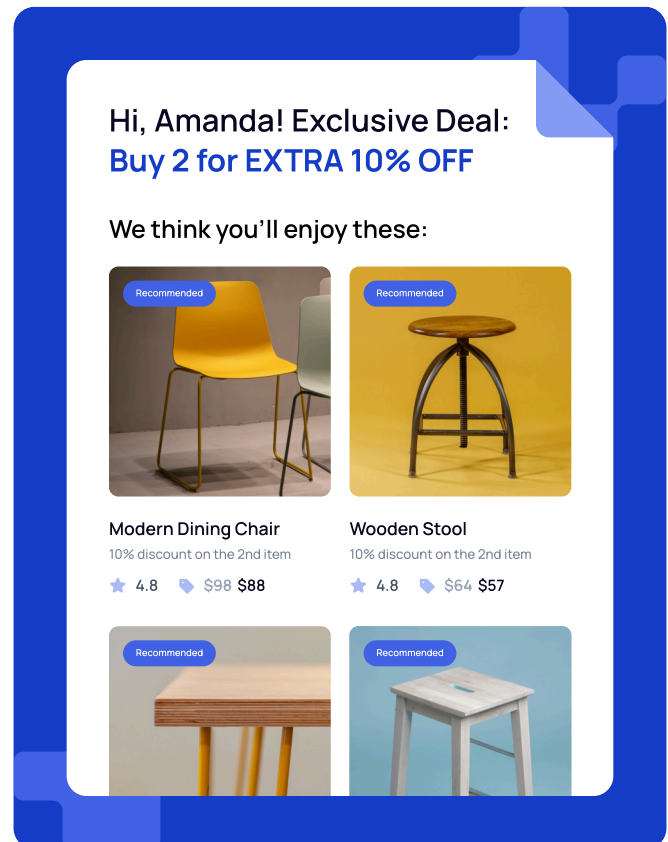
AI should be able to securely and safely use customer data to examine combinations and infer new insights at a speed humans just can't do. And most importantly, all of this should be optimized for revenue and customer lifetime value.

## More granular and dynamic personalization

With a CDP, you can get much more granular and personal than the fanciest rules-based ESP settings. Dynamic personalization without a unified view of the customer is limited to data fragments, so you often can't get more creative than MM/DD/YYYY triggers «Automated Happy Birthday Discount Email #1.»

With a CDP, you can automate endless parameters by unifying your data and integrating it with BI and analytics tools. For example, you can send a fantastic new sweatpants email to everyone who just bought slippers. Or, you can target 18 to 35-year-olds in your customers' upper 20% LTV cohort by sending them a secret invite to your pre-opening sale.

Combined with AI available in some CDPs like Simon Data, you can even send emails to customers who recently purchased a dress that's often reviewed highly for a wedding with a pair of shoes that are good for dancing. It's that easy.



## A single, unified, and real-time view of your customers

For the customer, a lack of orchestrated messaging results in over-messaging, inconsistency, fatigue, or promotions for things a customer has already purchased. Orchestrating from one place, at the customer level, where the unified data from all channels can be updated in real-time, gives the right information to the right person at the right time.

## Marketing experimentation

In-channel experimentation has been used forever, but that doesn't mean all CDPs offer orchestration that can power [cross-channel experimentation](#).



Imagine you have a significant promotional event and need to determine the right mix of email, in-app messaging, ad targeting, and SMS couponing to drive the most interest. How would you do this without a single platform allowing for cross-channel experimentation? You would have to manage holdout groups and control for execution.

Also, you should ensure no unintended overlap between test groups. You need consistency across segments. Then, you would export those segments into end channels, deploy, and gather and interpret results.

With a CDP powering cross-channel experimentation, you can manage end-channel execution from a single platform. You build segment parameters. Statistically significant groups are partitioned off into email-only, SMS-only, email & SMS, and holdout, with results and reporting rolling into that single platform.

Additionally, insight gathered from the tests feeds into your customer profiles. The test results should impact how you will communicate with customers going forward.

## The easiest path to growing customer lifetime value

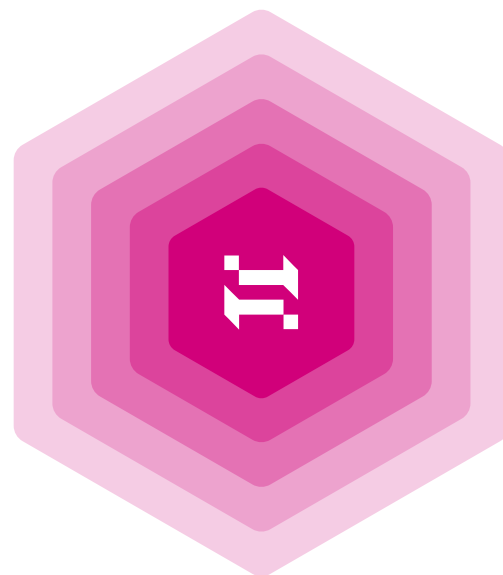
Thank you for reading our CDP buyer's guide. We hope it's given you a clear view of how the right CDP can transform your marketing operations and drive business growth. Now, let's talk about what makes Simon Data uniquely positioned to help you succeed.

### How Simon Data is different

Simon Data is more than a CDP. We give marketers the data, technology, and expert resources they need to stop guessing and start delivering what customers want.

Our comprehensive approach to driving customer lifetime value sets us apart — we act as a proven partner who's transformed customer marketing for leading brands. Unlike traditional CDPs that leave you to figure it out alone, we're with you every step, from strategic planning to campaign execution to measuring ROI.

Our hands-on approach ensures you implement the right solution while building a sustainable, revenue-driving customer marketing program focused on results, not technology.



### Brands that trust Simon Data

ASOS

TRAVEL+  
LEISURE

MATTRESSFIRM

wework

BARK

RESY

SPANX

1800  
flowers.com

EQUINOX



Thinx

CATCH CO

AWAY

Lulus

TECOVAS

HARMAN  
AUTOMOTIVE

## What we offer



### **We go beyond standard CDP capabilities**

We tackle the complete marketing personalization challenge by helping you:

- **Unblock your customer data and make it instantly actionable**
- **Simplify complex marketing workflows into intuitive processes**
- **Put creativity and experimentation back into enterprise marketing**
- **Drive customer lifetime value – guaranteed**



### **We offer a complete set of resources under one roof**

We support our clients through every stage of their customer marketing journey – from strategy to implementation to supporting or building your campaigns with data-driven campaign insights and specialized expertise. We're sort of like an agency with customer data in its DNA.



### **We maximize the value of your customer data from day one**

We focus on business outcomes that deliver the customer marketing program you need. We help you:

- **Connect all your data from your cloud data warehouse and anywhere else your customer data lives**
- **See a complete, actionable view of your customers directly in our CDP**
- **Establish the foundation for sophisticated personalization that drives results**



### **We empower you with advanced data capabilities and AI**

Our connected composable architecture allows marketing organizations to have access to more data. When combined with advanced AI capabilities in our platform, you gain deeper insights into customers and their behaviors to deliver better, more personalized marketing campaigns and build a true competitive advantage.

From faster access to insights to uncovering details about your customers through advanced AI offerings, Simon Data's CDP makes your customer data even more valuable.

## Our lifecycle services approach

Every organization has unique needs, so we tailor our partnership to match your goals. Our team assembles the right combination of:

- Technology to drive your specific use cases
- Strategic resources to guide your personalization journey
- Expert support to ensure your success

Whether you're beginning your customer data journey or ready to optimize existing campaigns, we bring the proven strategy, expertise, and tools to maximize your customer lifetime value from day one.

[Take a virtual tour of our platform](#) or [book a demo today!](#)

## Additional resources to maximize your CDP investment

### How to buy the right CDP for your org

[Supercharge your marketing ROI with a Snowflake-connected CDP](#)

[Convince your boss: The marketer's guide for championing a CDP](#)

[The right RFP template to improve your CDP buying process](#)

[Comparing the best CDPs for Snowflake](#)

[Enterprise CDPs: A comparative guide to unlocking customer data value](#)

## Power personalized marketing with your CDP

[How to \(actually\) achieve 1:1 marketing personalization in 2025](#)

[How 3 leading brands use a composable CDP to deliver personalized customer experiences](#)

[The top 10 CDP use cases to drive marketing growth](#)

[Whodunnit? A guide to activating identity resolution in your CDP](#)

[Building Customer360s with your CDP](#)

[Strategies to increase customer purchase frequency and lifetime value using a CDP](#)

[The top 6 ways CDPs unleash marketing innovation and experimentation](#)

[The winning strategy for AI-driven marketing with Simon Data and Snowflake](#)

## Why marketers choose Simon Data

[Hyper-personalization unleashed: Behind BARK's AOV success](#)

[Beyond the CDP: How Simon Data is revolutionizing customer marketing in 2025](#)

[About Simon Data's CDP](#)

[Simon Data for customer marketing teams](#)

[How brands create 1:1 customer experiences with Simon](#)

[Turn customer data into revenue with Simon Data's campaign services](#)

[Unlock 100x more value from your customer data with Simon](#)

[Create seamless audiences with Simon's new The Trade Desk integration](#)