

The Organization *of the* Future

A BLUEPRINT FOR
STRUCTURING YOUR OPTIMAL
CUSTOMER DATA TEAM

+ SAMPLE ORG CHARTS!



The Organization of the Future

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Customer Data and Customer Data Platforms (CDPs) are the Future

Why are Customer Data and CDPs the Future?

In 1993, Don Peppers and Martha Rogers wrote the book, *The One to One Future*, which predicted the impact technology would have on marketing and how building one-to-one customer relationships would be essential for customer loyalty and increasing customer lifetime value.

For many years, organizations have strived to deliver highly personalized and relevant experiences in hopes of creating happier customers. While it makes a lot of sense in theory, operationally, it has been hard to execute – especially at scale. Technology, processes, and talent are all real factors that have made the dream of executing one-to-one experiences a real challenge.

Over the last few years, strides have been made in marketing automation, personalization, and leveraging customer data. Notably, the recent pandemic kick-started digital transformation especially in traditional industries like financial services and healthcare.

Today, buyers enjoy the convenience and safety that digital options provide. For example, many consumers now prefer to bank online or use a mobile app, versus visiting a brick and mortar location. Digital telehealth options are also making it easier for patients to see doctors virtually. Restaurant diners

enjoy and at times prefer contactless menus out of convenience – after all, the QR code has been called the greatest comeback of the entire pandemic. Retail shoppers expect hyper-personalized discounts and offers based on their specific interests and locations. The common thread across all industries is consumers want highly personalized experiences that are timely, relevant, and trusted.

So what is available now that wasn't years ago when Peppers and Rogers first highlighted the value of being hyper-personalized? The answer lies in customer data. With access to multiple types and sources of customer data – and technology like Customer Data Platforms (CDPs) – organizations can make the one-to-one vision more of a reality.

Companies across the globe are looking for ways to collect, organize, enrich, and activate customer data effectively so they can deliver great customer experiences at scale and, in turn, produce amazing business outcomes. CDPs help achieve this.

What are other factors that make customer data and CDPs important?

5 Reasons Why Customer Data and CDPs Are Critical Now

There are 5 reasons customer data is now at the core of every business and companies have to figure out how to activate this critical asset right away, if you haven't already. If you have, there is always room for continued optimization to your data governance and ongoing strategy!



1. Increased online activity requires real-time agility and richer knowledge of your buyers

In 2019, U.S. e-commerce growth was nearly 15%. 2020, of course, was a different story, with retailers registering [record-breaking 31.8% growth in online sales](#). The COVID-19 pandemic drove significant change in buyer behaviors in mere months. Industry upswings and downturns have begun to level out, with 2021 growth coming in again at nearly 15%, the same as pre-pandemic levels. But the fact that growth even continued on top of 2020 levels indicates the long-term effects on consumer behavior will likely encourage even greater adoption

of digital channels due to newfound conveniences and changing buyer preferences.

With increasing online activity replacing traditional in-store, face-to-face experiences, brands will need to discover a way to engage with the right customers at the right time with the right offer and channel. To achieve this in real-time and at scale, organizations will require a Customer Data Platform. A CDP will enable companies to collect, unify, and activate their data to create amazing customer experiences at scale.



2. Data privacy regulations are expanding, so understanding what types of data your company uses and how it's collected is critical

The EU's General Data Protection Regulation (GDPR) kicked off the trend of privacy regulations aimed squarely at the way companies collect consumer data. With the promise of steep fines and changes to the definition of privacy as a right, companies have been working ever since to change how they handle customer data.

Other countries and many US states have followed suit, most notably California's Consumer Privacy Act (CCPA), which was the first state in the US to

provide consumers the right to know and delete the information companies collect on them as individuals as well as the right to sue for data misuse.

As more global privacy regulations are enacted, organizations will be challenged with managing varying regional requirements. In order to remain compliant, organizations will require the ability to properly segment and manage data permissions throughout the customer lifecycle – which can be enabled by a CDP.



3. Third-party cookies are slowly being eaten up, driving organizations to look towards evaluating first-party data strategies

Google announced they're phasing out third-party cookies in their popular web browser Chrome in the next two years. The loss of third-party cookie data will have significant impacts from reduced insights on Return on Ad Spend (ROAS), resulting in reductions in marketing budgets and ultimately

revenue. Knowing this, companies are turning towards adopting a first-party data strategy powered by a CDP. This will enable organizations to collect customer data directly from the buyer and create more trusted and relevant customer experiences.



4. The new CX standard – consumers demand relevant experiences

Today's consumers expect and demand experiences that are highly personalized to them. From our [2022 State of the CDP Report](#), two of the top three priorities respondents said became more important this past year were creating more personalized communication with customers and presenting an improved unified customer experience across channels. With so many companies competing for limited consumer attention on social media, digital, and email, delivering relevant

messages or offers to the right person at the right time is how companies will stand out.

Yet, executing personalized strategies can be tricky if customer data is incomplete or outdated and, more importantly, you do not have a CDP to help you to collect, enrich, and activate your data in real-time. A CDP will enable you to personalize at scale, creating experiences your customers crave.



5. Machine learning can drive significant impact, but is highly dependent on data quality

Machine Learning (ML) is changing the way many people work, especially data-driven marketers, analytics teams, and data scientists. ML can help anticipate churn, identify a segment that is most likely to buy, or even help recommend a preventative action to a patient.

Yet, according to research from Dimensional Research and Aiegeion, many ML projects are struggling to get off the ground. 80% of companies engaged in ML projects have reported them as stalled, while 96% of the projects have "run into

problems with data quality, data labeling required to train AI, and building model confidence." Companies developing their own ML algorithms are finding it difficult to get clean data into the models.

That's where the benefits of a CDP come into play.

For ML projects focused on using customer data, a CDP can help ensure data is clean and correlated, providing assurance that the AI is being trained with consistent sets of data from model to model.



Want to learn more about proven customer data use cases? Then check out [The Joy of Data Recipes for Success](#)

Why Technology Is Not the Only Consideration

The purpose of CDPs is to enable organizations to connect all sources of customer data to then create the best possible customer experiences. But it's not merely a marketing tool – CDPs enable an entire organization to glean better insights into their products, target market segments, what's working, what needs improvement, and how better to connect with and engage their customers for long-term success. CDPs help break down cross-departmental silos and streamline manual operations to improve bandwidth for innovation.

Yet, we all know technology is only one leg of the stool. Purchasing the technology is the first step in a transformative journey. It's also critical to ensure your organization has the right processes and people to drive positive business outcomes. Otherwise, the technology is just another shelfware tool gathering “digital dust” in the corner.

Your People – Whether finding internal employees to staff for a CDP team (the ideal solution) or hiring externally (also an option), it's critical to find not only the right skill sets but the right mindsets, as well. Curious people with a knack for technology, strategy and data analytics are who you'll want to find to helm your CDP. There will be the day-to-day users of the CDP (e.g. technical marketers). There will also be key stakeholders like marketing executives that may need insights from the CDP, but are not logging in regularly. It is important to identify early who will need access daily, versus who will want insights.

This eBook provides ten sample organizational chart structures to define which roles and for which responsibilities you will need to coordinate.

Your Processes – Identifying the types of data your organization collects, where it is housed, integrating it across your organization, and analyzing it across departments will come into play with successfully implementing your CDP. It is helpful to create a steering committee or core team that meets regularly to [define and prioritize use cases and business outcomes](#). It is important to note that you should start with a set of high value use cases that can drive strong business outcomes. No need to boil the ocean, start small and get some wins on the board!

This eBook highlights some proven examples on how to structure internal teams (including ideas around talent) and tips for updating internal processes to ensure your organization will drive the maximum value out of a CDP. To do this, we interviewed a wide range of global organizations from different industries and sizes to provide a variety of options. Let's dive in and explore what's possible!

Successfully Preparing for Bringing a Customer Data Platform Into Your Organization

Maximizing your investment in customer data management and a CDP requires a thoughtful approach to team and organizational structure. Customer data is a team sport and in order to ensure your company is collecting and using data efficiently (and in a compliant manner) it requires collaboration across departments often including Marketing, IT, Data, and Customer Success to name a few. It is helpful if cross departmental teams clearly document roles and responsibilities. Does a team need to access a CDP daily or just be involved occasionally? Being clear about objectives and 'swim lanes' early helps ensure projects have the right buy-in and defined outcomes.

There are three high-level considerations when getting started with a CDP:

- 1. Agree on the top business outcomes** that the company is trying to achieve with a CDP (for e.g.: Improve retention in segment 'x' by 15%, or marketing needs to reduce advertising spend on segment 'y' by 25%). Defining the business goal(s) will also help the core team narrow in on which use cases to prioritize. It is important not to boil the ocean. Instead, understand where the company can achieve the most value and start there. It can also be helpful to develop a roadmap to ensure stakeholders have a sense of priorities and timing. Setting expectations is key.
- 2. Identify what customer data exists and where it resides** within the organization. It is important to know what types of data are currently collected and where it is stored. If different groups are involved (e.g. Marketing, IT, Digital), bring them together so you can get a complete picture of the data sources and any possible issues.
- 3. Design a core team** that owns customer data and the use cases. This team should be cross-functional in nature and own the roadmap, timelines, resources, goals, and measurement. Being clear on roles and responsibilities within the core team is essential to prevent confusion or duplicative efforts and processes.

“The customer experience is company centric and every team (in the organization) is involved. Our UX and Product teams are trying to find the simplest and most BI way to lead a person to financing. Those choices and decisions we make are based on data. So the Data team comes in and shares that data and the pain points where we can do better. We have data scientists building models, implementing AI to make our products smarter and move the business forward. And no one would find us if not for our website. Our Marketing team comes on the acquisition side. Our Engineering team is involved in the main business experience of the user. And Sales and Customer Service, people will like working with our customer success team if these teams have all those data insights.”

– Senior Data Analyst,
Financial Technology Firm



Kicking Off a CDP Project – Checklist

- Know why you are starting – define your top business goal(s) for using a CDP
- Understand and map out where key data sources are within the organization and identify owners
- Define your data governance and data strategy across all departments
- Identify key technology used in the tech stack (e.g. what are you using for email, mobile, etc.)
- Take a baseline measurement of data to track current state – so later the team can show the improvements
- Define a working core team that will own use cases and report out on success

The core team should:

- Identify your top use case – one to three maximum to get started
- Select the team members who will be responsible for executing each use case
- Schedule weekly stand ups with key stakeholders
- Use a communication platform for ongoing discussions by use case
- Use a project management tool organized by use case
- Present findings through executive and company wide presentations to communicate successes beyond the main stakeholders for greater buy-in and understanding across the company
- Make sure to track short-term wins and then show progress against longer term goals

“The first step to successfully implementing a CDP is to find that use case to be the first problem you’re trying to solve, be it better data layers, getting rid of cookies, or better personalization with AudienceStream.”

– Head of Marketing Operations, Global Pharmaceutical Company

Carefully Assessing Your Current Operating Processes and Procedures



1 – Data Collection Processes and Procedures

- Do you have explicit, organization-wide guidelines in place for the collection and use of customer data?
- Is your customer data integrated internally with your tech stack?
- How are you analyzing your data?
- Do you have a compliant data collection process? It is a good idea to involve your Data Privacy or Legal team to ensure the right steps are taken around upholding privacy preferences.



2 – Organizational Communication and Collaboration Processes

- How do you currently communicate across departments?
- What collaboration tools do you use across departments that can be leveraged?
- What tools do different departments use independently that can be integrated for better communication?



3 – Internal Staff Resources and Budget

- Do you have a dedicated Marketing Operations and Customer Operations team?
- Do you have an established Data or Analytics team?
- Do you have a complex tech stack that needs to be carefully integrated?
- Which department has the budget to allocate to a CDP?



4 – Goals, Outcomes, and Communicating Success

- Have you defined clear goals and outcomes?
- Have you reviewed these with senior leaders to ensure there is buy-in?
- Were you clear on timelines and when milestones will be met?

The above is not an exhaustive list but rather a good place to start to ensure teams are better aligned, resulting in the success of your CDP initiatives.

Choosing the Team Structure that Best Fits Your Organization Now

Depending on your industry, company size, and objectives, there are different ways to structure your team. In putting this piece together, we spoke to a wide range of global companies across several industries and have highlighted our findings below.

The right structure for your organization will depend on four things:

1. **Size of your team** and expertise that currently exist within your organization
2. **MarTech stack sophistication** and types of data integrations that exist
3. **Customer data ownership** (e.g. who owns customer data in your organization?)
4. **Business goal owner / budget owner** (e.g. who owns the budget and is responsible for the business outcome?)

Wherever you place CDP ownership, remember customer data is a team sport and it is important to involve cross-departmental teams early and often.

“It is easier to collaborate and drive CDP projects together when we have common quantifiable goals amongst teams. We then measure the use case performance, which leads us to form the next CDP use case.”

– Senior Marketing Manager,
Financial Services Firm, APJ

“The CDP allows for suppression use cases, but suppressing in one channel could subsequently lead to fewer impressions in another channel. If the suppression use case benefits the company, that needs to be reflected in other channels so that the two teams aren’t operating on competing performance measurements.”

– Robin Geier, Senior Consultant
Value Engineering, Tealium

10 Ways to Structure Your Teams for a Customer Data Platform

1 The New Org: The Data Center of Excellence and The Customer Data (CDOPs) Team

Level – Aspirational!

Team is centralized (separate from the business units they serve), the goal is to drive access and scale around customer data.

Description

The Data Center of Excellence (DCoE) is a centralized department that specializes in the strategy, design, staffing, and delivery of a Service(s) that the organization requires at scale. It is run by Customer Data Operations, or CDOPs. This team acts as a utility, offering outputs that are audited, fiscally accountable, and mapped to direct value (revenue, cost avoidance, productivity gains) for every Business Unit/IT Unit that benefits from its establishment. It is agnostic of geographic locations or business units.

Goals

The goal of the CDOPs team is to achieve scale and consistency by concentrating talent and resources. The team helps streamline access to unified customer data to increase the speed at which cross-departmental teams can act. They are responsible for defining and answering critical, company wide questions. For example, how to create a data layer that standardizes naming conventions and governance, how to integrate the data infrastructure, how to maintain data security and compliance, and then design a solution and delivery model that helps build out use cases for the data across the entire organization.

CDOPs Responsibilities Include:

- Data Strategies, Thought Leadership
- Best Practices, Methodology, Process
- R&D, Innovation, Recommendations
- Support, Education, Enablement
- Driven by KPIs, Reporting

The people who make up the Data Center of Excellence will have skills that come from many departments including Marketing, Data, IT, Product, etc. They will champion the CDP across the organization and focus on the successful activation of identified use cases.

The Data Center of Excellence will restructure your organization by introducing a new team that collaborates across multiple departments for the purpose of ingesting, organizing, and activating customer data in all ways possible.

“CX leaders democratize data and use it as a foundation for decision-making across business units. (These) leaders are 1.8 times as likely to state that their employees have direct access to role-relevant CX information — highlighting the need to truly democratize CX feedback.”

– Medallia’s [Uncovering the Secrets Behind a Successful Customer Experience Program Report](#)

Team Roles

Chief Data Officer – Strategizes the use cases across the organization and acts as the single voice linking the back office investment and the front office revenue

CDP Demand Management Leads – Dedicated to each brand or department within the organization to determine what data is needed to create each use case

Data Architecture Director – Establishes the overall data design

CDP Architect – Sets up and operates the platform integrations and maintains customer profiles and audiences

Project Manager – Coordinates resources, manages deliverables, maintains timelines

CDP Analyst – Organizes audiences and runs predictions

Data Source Engineer – Manages data sources including web, mobile, CRM, etc.

CDP Tech – Sets up and manages the platform

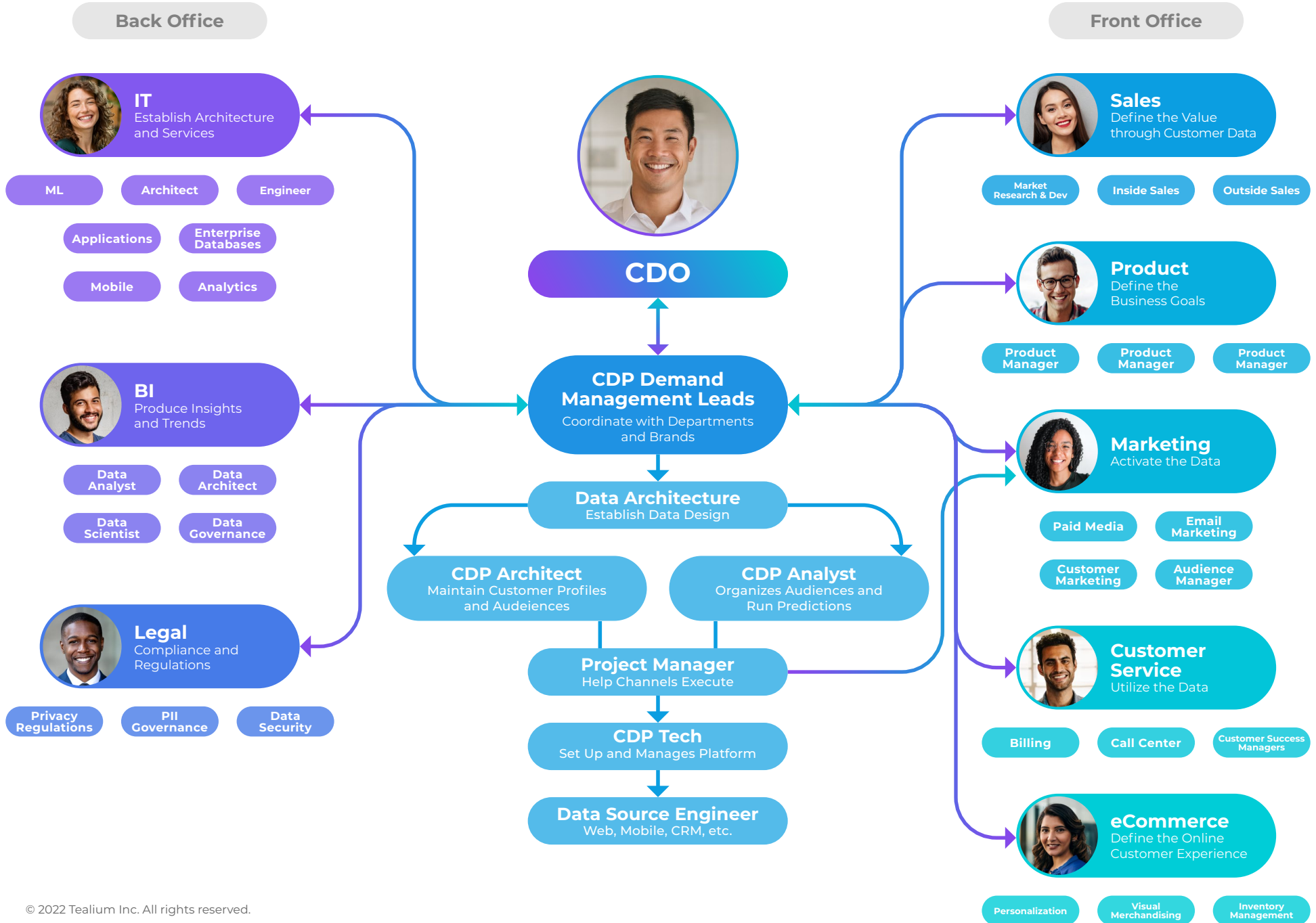
“Managing the complex mix of technology, customer data and personnel required for ethical accountability demands a multidisciplinary team or workgroup to ensure all appropriate stakeholders are involved. That means participation is needed by all business units that generate and utilize data, or are directly affected by the company’s customer data use.”

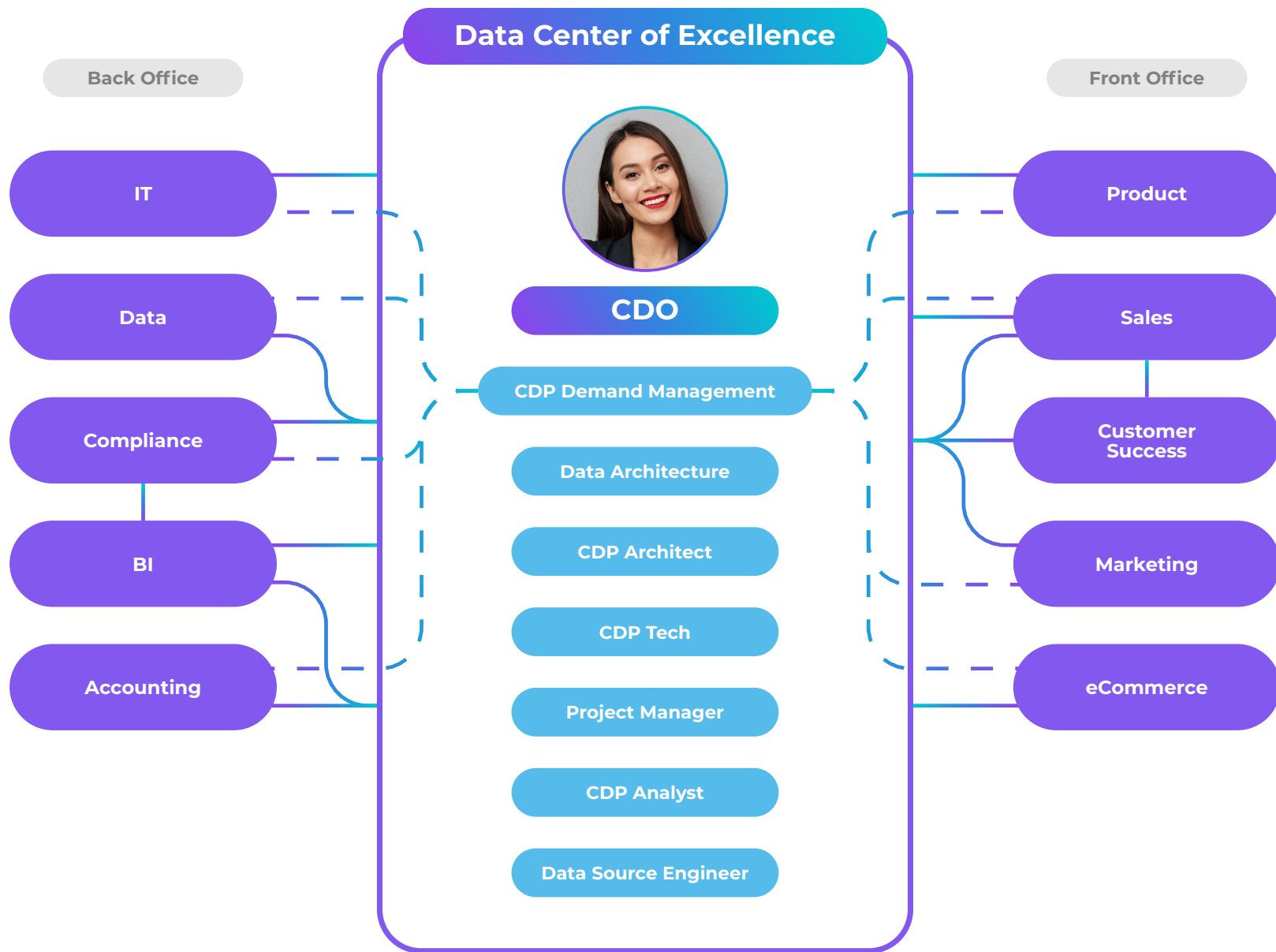
– Gartner®, “How Successful Digital Marketing Teams Approach Customer Data Management”, Rachel Smith, 14 February 2022.

“When structuring your CDP team, it’s really less about who owns the CDP – **you will have to get over the land grab mentality and consider how the CDP best fits the organization. At our company we created a new team that could speak to both IT and Marketing.**”

– Director of eCommerce Analytics, Global Retail Organization

Data Center of Excellence





Data → Decisions → Delivery

In speaking with a variety of organizations, we also observed another way in which CDOPs play a role. Some companies structure their teams and processes that follow a data → decisions → activation model. In this model, a member of the CDOPs team resides in each category.



Data

This group is responsible for the management of the CDP. They will work the most closely with the platform:

- Chief Data Officer
- Data Analyst
- Data Architect
- Data Scientist
- Chief Technology Officer
- Machine Learning Engineer
- CDP Architect
- Compliance Officer
- CRM Manager
- Web Developer



Decisions

This group strategizes the insights being derived from the data in the CDP. They have moderate involvement with the platform, but are not building anything:

- Chief Marketing Officer
- Product Directors
- Marketing Directors
- CDP Demand Management Leads
- Audience Manager



Delivery

This group activates the automated data integrations in their various channels / platforms. They have low involvement with the platform directly:

- Project Manager
- Marketing Channel Managers
- Call Center Operators / Customer Service
- Sales
- eCommerce
- Mobile

What company is the best fit for this team structure?

This team structure is ideal for companies that want wide-scale adoption of customer data and are interested in standardizing best practices, while retaining agility. Keep in mind this is a shared service across multiple departments.

In our research, we also found some companies used alternative names for CDOPs Teams: Lead Nurture Team, Personalization Team, The Platform Team, Tagging and Taxonomy, and eCommerce Analytics Team to name a few.

2 Data Led CDP Team

Level – Advanced

(designated Data Team indicates more evolved data processes)

This team is run by a data focused group including data analysts, data architects, data engineers, and data scientists, who are highly technical. The goal is to ensure a strong data strategy is in place to enable business outcomes.

Description

Many organizations choose their Data department to run the customer data platform, because the team is already responsible for company data, data governance, and data analysis. One of the biggest risks to watch out for with this team structure is being too siloed from the actual activation of the data being managed within the CDP. Marketing partners requesting audiences for customer experiences can be too disconnected from the actual operations of the platform to understand how to effectively communicate their requests to the Data Team.

“You need the data source owners to own the CDP because they know what the data is called. But you also need a stakeholder for every source. This can not be a one person administrator.”

– Ted Sfikas, RVP of Solutions Consulting, Americas, Tealium

“Our team had some growing pains, often needing more information from marketing than they knew how to communicate. For example, defining specifically what ‘first 30 days’ means so that the audience can be accurately created.”

– Director of eCommerce Analytics, Online Retail Organization

Goals

A goal this team thinks about a lot is the ability to remain flexible. If the business brings in new data sources or tools, a data first team is ready. They value the importance of establishing a unified approach to data that empowers cross-organizational collection, access, and activation of the company’s most powerful, comprehensive data set.

Team Roles

Data Analysts – They work on the data foundation, audience building, and connector setup. They will develop and apply robust and transparent methods for data cleaning and modeling within the CDP.

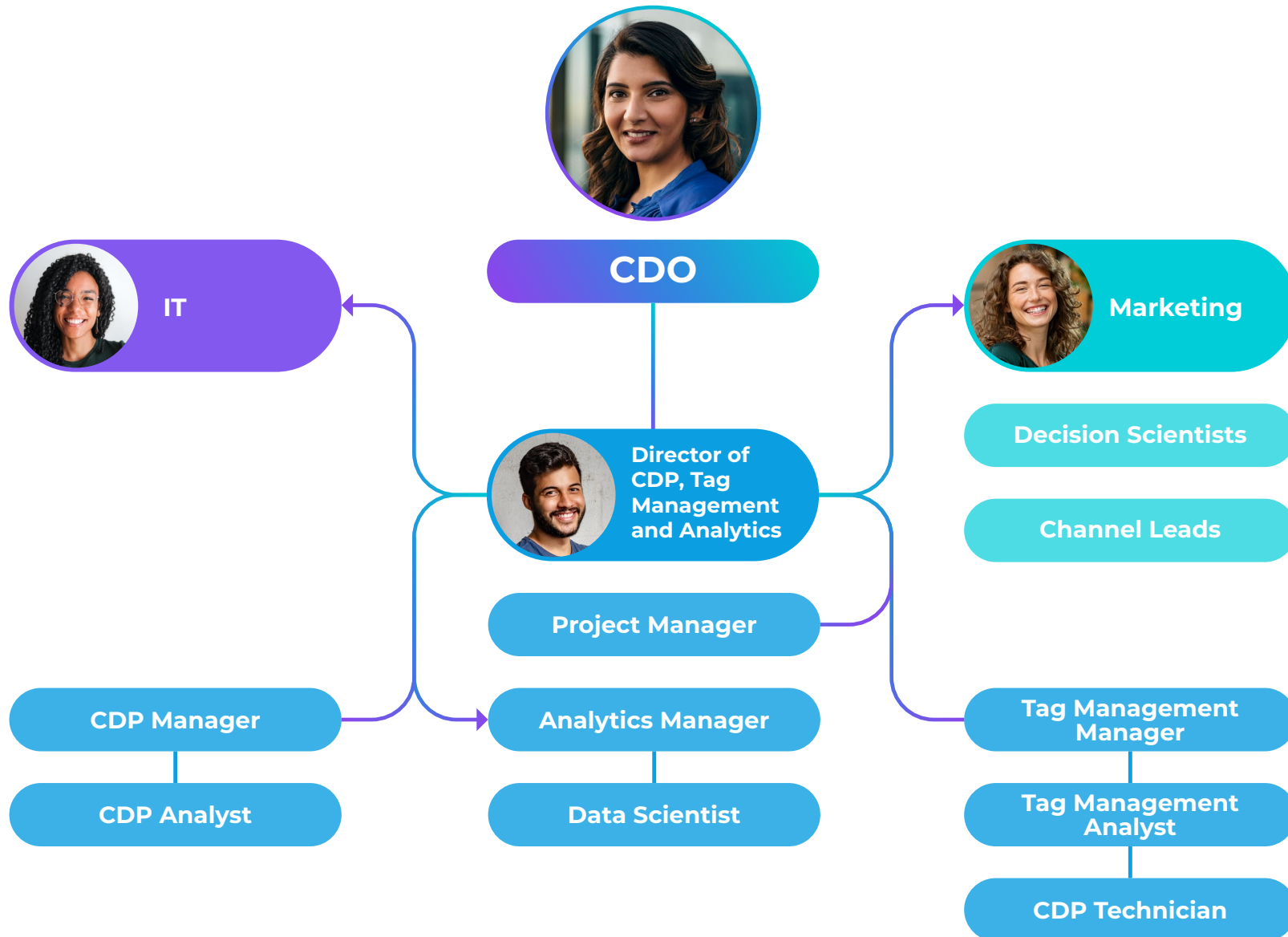
Data Engineering – They manage the ingestion of the data and provide clean, usable data to the business in accordance with company governance requirements, as well as measure the data and provide insights to product management for decisioning.

Data Architects – They focus on the data infrastructure of the organization and design blueprints for data management systems and machine learning, while ensuring data security and compliance with regulations.

Data Scientists – They analyze CDP performance, monitor incoming data source, the channels and platforms where data should go once it’s processed through the CDP, and how to present the data to other business units.

What company is the best fit for this team structure?

If your organization has an established data department, you should consider centering your Customer Data Team in this space. One of the biggest benefits of having your Customer Data Platform aligned with your Data Team is the close tie it creates between the data users. It results in them all speaking the same language back and forth between all data platforms. Also, having a thoughtful data strategy foundation in place helps drive thoughtful business decisions – it is like getting the plumbing right in your house before building a kitchen!



Customer Showcase – Online Retail Organization

The Challenge

Needed to have JavaScript tags off the site, like a pixel for cart abandonment, and move them server side to improve performance.

The Solution

Onboarded Tealium, but it quickly became apparent the management of the system required a dedicated team.

The Results

Built a team structure that created a close tie between the data users enabling them to speak the same language. The majority of data in the CDP is collected in real-time on the website, but some of their customer data comes in overnight, and Tealium's automatic imports ensure customers are going into the right audiences. They also have modeling teams and scores that aren't directly integrated into the CDP that can now be automatically imported, which helps with audience creation, as well.

“Once people in the company could see the capabilities and possibilities of the CDP, everyone wanted it and there became a bit of a land grab, Marketing wanted to own it, Technology wanted to own it, but we kept Data Analytics as the driver to help identify what we wanted to do with the CDP strategically, through analytics and based on the different performances of the audiences.”

– Director of eCommerce Analytics, Online Retail Organization





3 Marketing Led CDP Team

Level – Advanced, Developing, or Intermediate

(the most likely team to lead the CDP)

Team is led by marketing with a strong customer experience lens. This group thinks about use cases and how they can drive the best outcomes for their target audience.

Description

The Marketing department is often the team leading the charge to onboard a CDP, because they are the team that will utilize the audiences, segments, single view of the customers, and other use cases for increased ROI, better targeting, etc. Digital marketing leaders recognize the significance of data quality and how it can impact their ability to inform decisions and strategy. Given marketing is the department putting good data to use, it makes sense the responsibility for the CDP would reside in this department. It's the most common place for the CDP to live within today's organizations.

Goals

Marketers care deeply about the customer experience – it drives the department. They have business goals and the budget that lead the efforts to maximize customer data. Because they are often the team measured on the outcomes, they will be highly motivated to ensure the CDP is leveraged effectively. That being said, not all marketing teams have technical marketers or data analysts. If your CDP sits within your Marketing department, it's critical to make a concerted effort to prevent the CDP from becoming siloed in Marketing. At a minimum, Marketing should work closely with the Data Team, because they own the data, but they should also align with IT, Sales, Customer Service, Product, and all other key stakeholders.

Team Roles

Marketing Managers – They develop detailed use cases, including data requirements, audience definition, as well as execution and engagement strategy. They also report on Return on Ad Spend (ROAS) and campaign efficiency.

Marketing Analytics – They manage all marketing analytics platforms and take a backward-facing view to see how the business is performing. They communicate to marketing managers how the campaigns are performing, the data they are collecting, metrics to optimize for, audiences to target, and define the customer journey stages.

Marketing Operations (MOPs) Team – They own the contract for the CDP, handle the tag management and data intake across platforms, create the audiences, and integrate second and third-party vendors into the CDP.

What company is the best fit for this team structure?

A Marketing led CDP team is great for a company that has a strong Marketing team that cares about customer experience and has clear use cases. Marketing is often the team measured on CDP outcomes, so it can be a very natural fit.

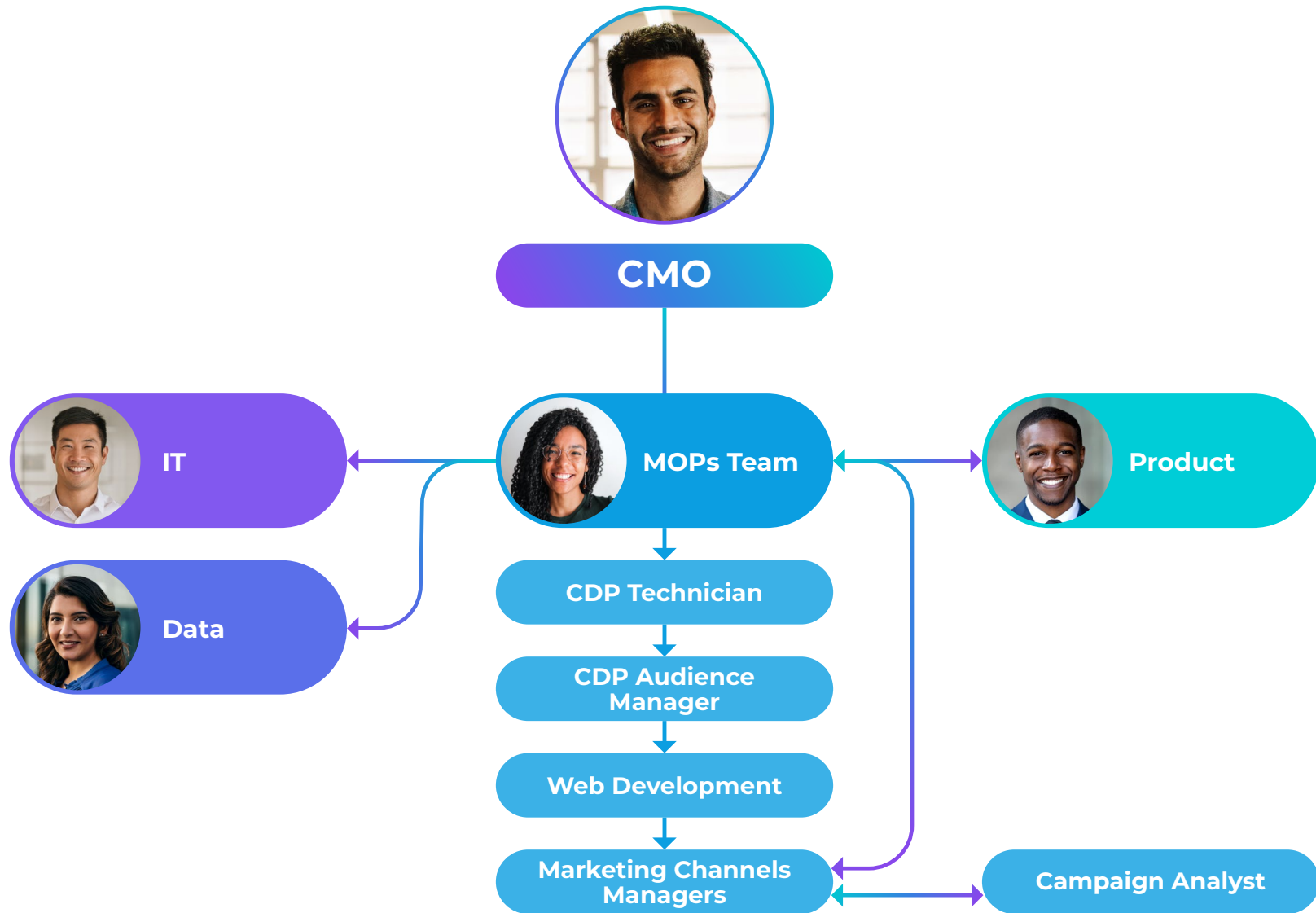


“Marketing is the number one use case for CDPs. Marketing is the natural consequence of good data governance. The CDP is a tool that allows for better marketing because they can trust the data to activate powerful campaigns.”

– Ted Sfikas, RVP of Solutions Consulting, Americas, Tealium

“A lot of times, especially in a large organization, channel managers can be islands. (Marketing Operations) MOPs has the opportunity to be the bridge between teams and break down internal silos, not just on how data is used in the marketing organization but how to break down communication barriers between all departments.”

– Robert Anderson, Customer Success Architect, Tealium



Customer Showcase – Global Pharmaceutical Company

The Challenge

Needed strategies to help drive growth and simplify their operating model across almost 100 brands at a global scale.

The Solution

Onboarded Tealium to improve return on ad spend (ROAS) and create more timely and personalized experiences for healthcare professionals (HCP) and patients. Created a team of data-driven marketers to manage the platform.

The Results

Achieved a 14% lift in open rate, 38% drop in bounce rate on website, and 143% increase in on-site engagement.

“Before a CDP, we had various agencies managing our digital properties differently, including coding things differently, leading to inconsistencies across our analytics and data flow. As we embarked on tackling our next generation engagement and personalizing our messaging within each target audience, the lack of a CDP came into the picture and the technology became not just a tool, but a part of enabling our vision.”

– Head of Marketing Operations, Global Pharmaceutical Company



4 IT Led CDP Team

Level – Developing

(no designated Data team)

Team is led by IT. They think about how to efficiently manage and run technology platforms to be cost effective, trusted, and secure.

Description

Companies may choose to let IT own the CDP because IT is typically responsible for Artificial Intelligence (AI) and Machine Learning (ML) efforts. IT also manages the organization's tech stack and, given the integration requirements and capabilities of the CDP, will have to manage the CDPs alignment with the rest of the architecture. If an organization doesn't have a defined Data Team, those positions will fall in the IT department, further securing this natural alignment.

Goals

IT lead teams often prioritize security and efficiency across all technical platforms. When done well, this can result in cost savings and risk mitigation across the business.

Team Roles

Machine Learning Engineer – They automate predictive models by researching, building, and designing AI systems, including within the CDP.

Full Stack Engineer / Developer – They own large components and systems within the tech stack, and lead the coordination and communication of CDP implementation across teams.

Backend Engineer / Developer – They are responsible for the backend development of designing, building, and maintaining the server-side of web applications.

Data Center Engineer – They install, upgrade, troubleshoot, and maintain physical infrastructure that resides within the data lake, including the CDP.

What company is the best fit for this team structure?

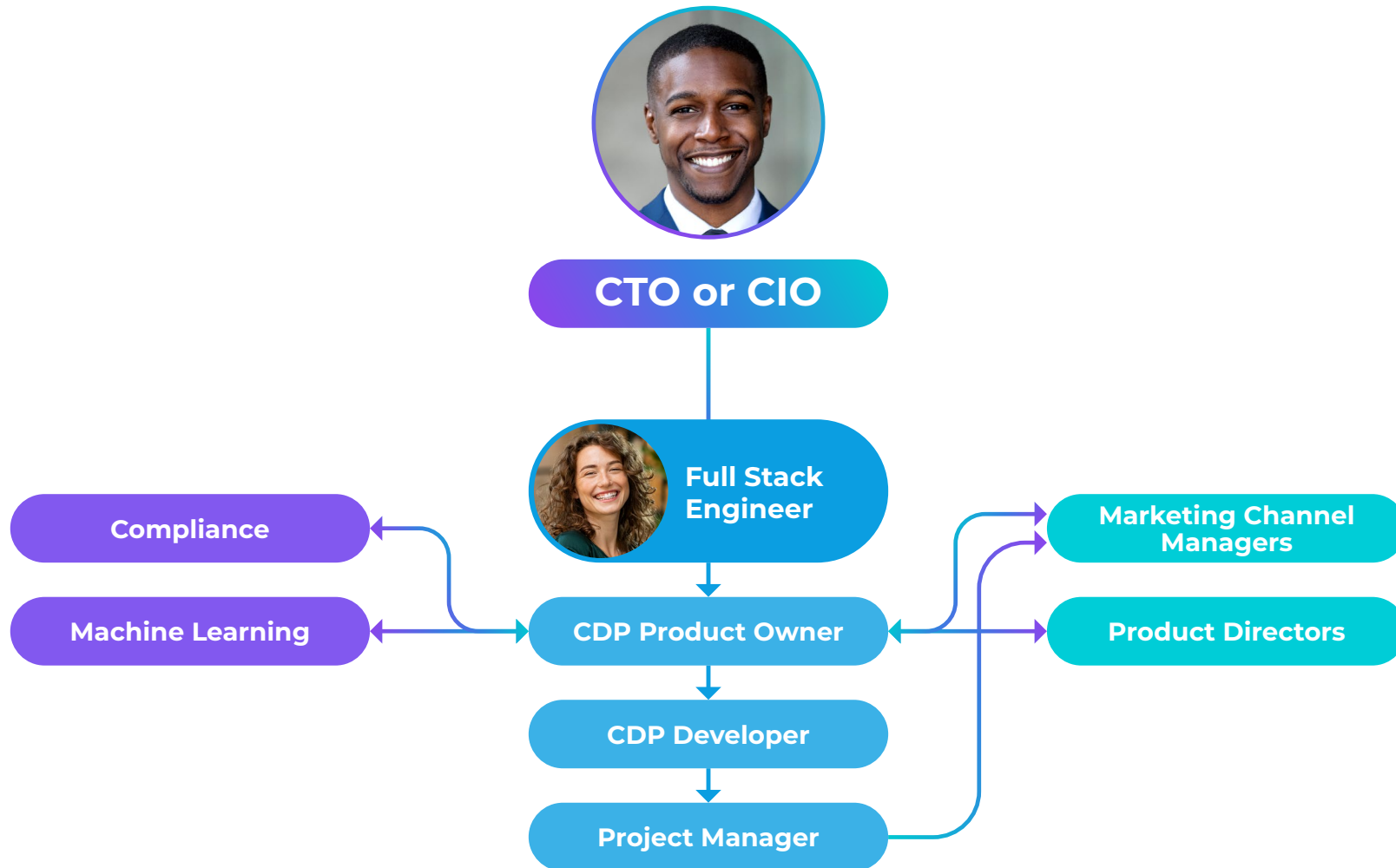
Organizations with complicated tech stacks should consider putting their customer data team in the IT Department to ensure proper alignment across the stack. Also, companies that value thoughtful technology stacks and have a sizable number of integrations may want to consider this model. Organizations that choose to let IT lead the CDP Team need to ensure they aren't isolating Marketing from AI and ML efforts as it will disconnect their initiatives from the customer experience.

“Sometimes the CDP is a technology led initiative, with tech teams working on building out data lakes or AI initiatives that lead the organization.”

– Jay Calavas, Chief Innovation Officer, Tealium

“IT is taking more control of the CDP because CDPs are a subset of digital transformation, and the cloud and sophistication of data being collected require heavy technical skills that marketing doesn't have. Previously, IT didn't have the resources that the CDP provides and would just put a tag on a website. Now, with the CDP, it's more technical, sophisticated, and complex, so companies running a CDP need a more technical staff.”

– Travis Giffin, Principal Customer Success Architect, Tealium



Customer Showcase – International Retail Company

The Challenge

With a growing portfolio of eCommerce solutions, they needed to understand more about their customers' behavior.

The Solution

Started with TealiumIQ and expanded with EventStream and AudienceStream. They created a Tealium CDP team to manage the platform that is responsible for the vision, stakeholder management, maximizing business value, and interfacing with the business teams to gather and understand business requirements. The team also has technical people, developers, and architects to run the CDP.

The Results

By standardizing the use of Tealium for integrations, APIs, and middleware to merge all the data for the CDP, they have been able to use this pattern across different countries and eCommerce products.

“I can already see the benefits of standardization because, when it comes to another country rollout, we can follow the same integration pattern from a previous country, which we already know how to do within Tealium, and can be very quick in adding an additional country into the CDP. It shortens time from two months to two weeks and we have these synergies there and economies of scale.”

– Senior CDP Project Manager, International Retail Company



5 Product Led CDP Team

Level – Advanced or Developing

(they're familiar with utilizing data intelligence for business advancement)

Team is led by the product focused groups. They focus on data types that provide better product experiences and want to drive business outcomes through data.

Description

Organizations that are product led may favor this organizational structure for their CDOPs team. Specifically, if Product drives the business while other teams like Marketing and IT are in support roles, this model could be effective.

Goals

This team leverages customer data to inform 'all things product.' Product Management is driving the business with Marketing and Analytics supporting business outcomes. Product defines the business goals and the overall strategy for how they should be achieved. They need access to customer data to quickly inform things like product enhancements or feature adjustments. Also, it helps Product teams quickly understand key segments using the product(s).

“How are organizations showing and measuring success? It comes down to the individual products the company sells. Companies focus on creating use cases for the CDP, but it's really dependent on how the CDP can support the business. Product can align use cases to the overall business strategy.”

– Danny Moschke, Lead Customer Success Consultant, EMEA, Tealium

Team Roles

Head of Product – Defines the product strategy and how it can contribute to the company goals.

Product Directors – Develops high-level use cases together with the marketing channels that support the product strategy.

CDP Demand Management Lead – Coordinates with the product managers and the other departments.

CDP Architect – Sets up and operates the platform integrations and maintains customer profiles and audiences.

CDP Analyst – Organizes audiences and runs predictions.

CDP Tech – Sets up and manages the platform.

What company is the best fit for this team structure?

Organizations with complex product portfolios or innovative and evolving solutions should consider putting CDP ownership in the Product department. This will allow use cases to align directly to overall business growth goals that can be trickled down to the other supporting departments.

One consideration to Product owning the CDP is they sometimes do not have the technical expertise to run the platform, nor do they have the marketing or data expertise to organize and activate the data. They will have to create a new team that has these skills or align directly with all of these departments in order to operate and manage the CDP. But when it comes to identifying use cases, which is ultimately the make or break of CDP success, this team will have a clear vision for what is needed at the highest level.

“There are three direct team members in the company who use the CDP, and we work under the Product Organization. The Marketing Team is our customer.”

– Head of Growth – Marketing Technology & Ad Ops, Real Estate Technology Company



Customer Showcase – Real Estate Technology Company

The Challenge

Didn't know how to use their data or where it was coming from.

The Solution

Looked for T-shaped skill sets to operate the CDP, people who have worked across marketing and technology. With this approach, they found people who were specialized in multiple disciplines and were willing to try something new.

The Results

They now understand what's in their data layer, how to set up tracking, and how to adopt new features. By knowing how to deploy data and where its coming from, they can also more easily onboard new platforms. The Marketing team can come to them with new vendors that they are able to quickly integrate with their CDP.

“When managing integrations with the CDP, we work with Marketing to connect new vendors. They provide the documentation and we work with the stakeholder in Marketing to understand what the vendor does and then work with our front end engineers to add new attributes if need be.”

– Head of Growth - Marketing Technology & Ad Ops, Real Estate Technology Company



Additional Organizational Structures

Based on company size, agency involvement, and more regulated industry types

Size of the Organization

The size of your organization is also a factor to consider when evaluating how to best structure your CDP team. Companies have different approaches to how data is collected, handled, and activated so it is smart not to operate in isolation. Involve cross-functional teams early so there is buy-in and alignment. One thing we hear often is that CDP implementations are much more successful when the right folks are involved early and often.

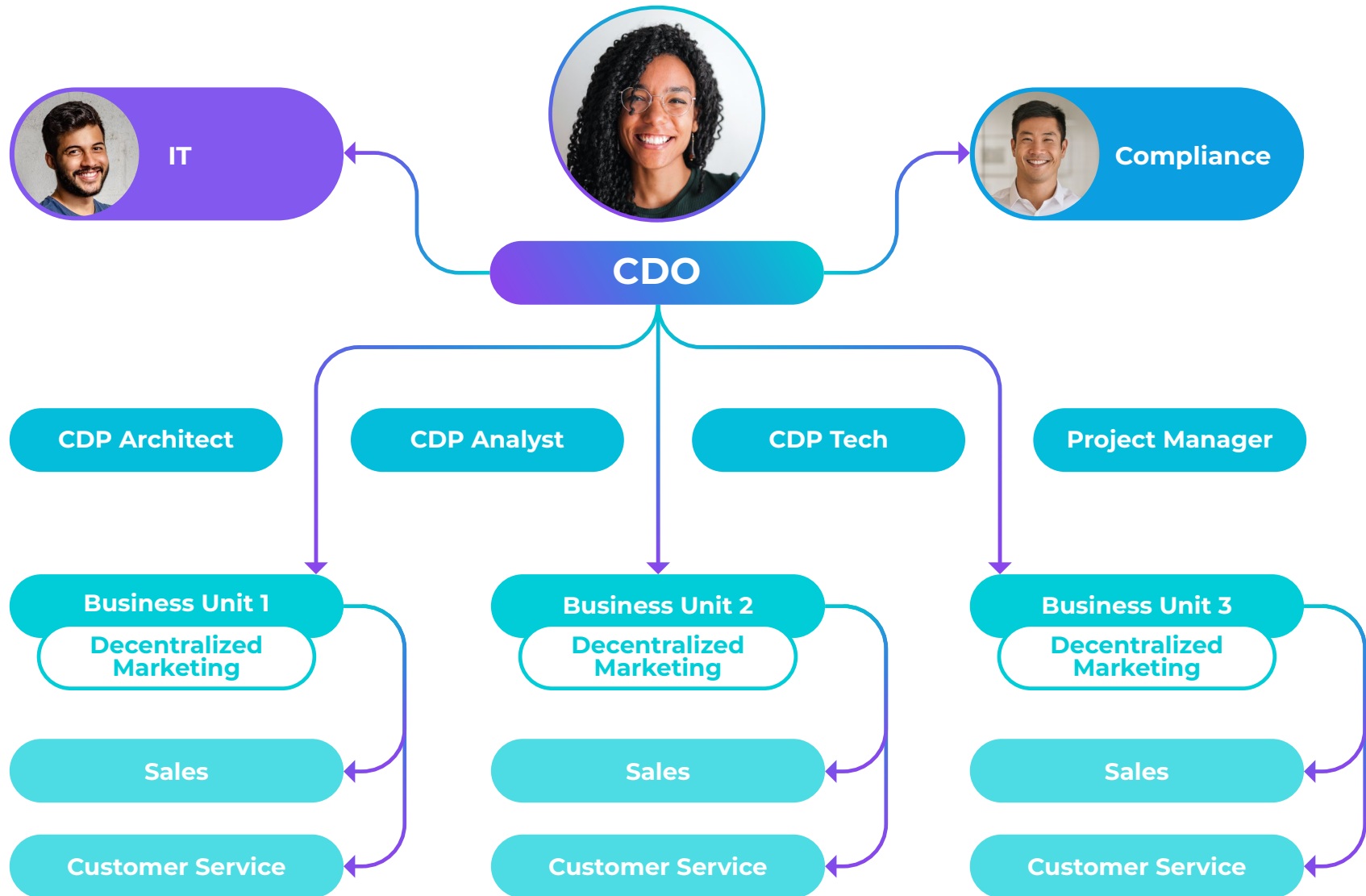
6 CDP Team at a Large Enterprise Organization

Large enterprise organizations have unique requirements when implementing any type of new technology. It is important to include IT and Legal teams to ensure the right internal processes are followed. Also, with many global privacy laws, it is helpful to get input on how data may need to be addressed differently depending on the region. A good best practice is to have a CDP team that includes stakeholders from different groups to ensure alignment and proactive communication. It is also helpful to start in a particular group with a defined use case. Achieve a small and measurable success before rolling out the CDP more broadly. Developing a roadmap with a timeline is also a proven best practice.

As mentioned earlier, we discovered many large enterprises put their CDP in the Marketing or Data departments, but these organizations should consider adopting the Data Center of Excellence model to create a solid foundation required for success at this scale.

“Make sure to have a scalable, agile framework. Come together with key stakeholders every 6 weeks to showcase your successes and what you’ve learned.”

– Senior CDP Project Manager, International Retail Company



7 CDP Team at a Mid-Size Organization

Small and medium-sized companies may have constraints when it comes to the human resources available to work on a technology implementation. But that is OK! The benefit is that these teams can often be more agile. Many of the same considerations apply as in larger enterprises. It is smart to develop a CDP team that includes a representative from cross-functional teams (e.g. IT, Marketing, and Data) as it helps ensure there is alignment and consistency with communication. Also, involve Legal teams to get input on respective data privacy regulations.

From our interviews, we also observed mid-size organizations had their CDP reside in the Marketing department more often than other sized organizations in order to streamline ownership with activation. But ultimately, mid-sized organizations should model after the Data Center of Excellence. This means having a team of more than one to two people, focus on establishing sophisticated data governance processes and work to educate the rest of the organization about the overall value and opportunities available through the CDP.

“The CDP didn’t impact our organizational structure since it has been managed by existing team members. However, these one to two employees in the Marketing team are now dedicated to managing and running the CDP projects, as the outcomes we are achieving with the CDP are becoming substantial. Eventually we will need more than one or two people to manage the CDP.”

– Senior Marketing Manager, Financial Services Firm, APJ





8 Agency Supported CDP Team

+
9

Agencies that specialize in CDP implementation (including integrations, etc.) can provide tremendous support especially during the outset of onboarding a CDP. They have the incredible benefit of working with many companies on implementations and they can advise on the best use cases and how to avoid common pitfalls. They can help companies identify how to measure success, bridge the communication gap between departments, and upskill current staff. If talent and support are a challenge for your organization, agencies and partners are great options.

“We have worked with a few consultants from the tagging side to supplement work on occasion because it’s very hard to find tagging experts. We also have a marketing agency we work with to enact our consultants’ strategic recommendations through the CDP.”

– Director of eCommerce Analytics, Online Retail Organization

Companies of all sizes should consider utilizing agency and consultant support at the beginning, even for the most sophisticated, data-driven organizations. However, it’s important for organizations utilizing agency support not to rely too heavily on this critical partnership.

“The agency should be used to upskill employees. Companies cannot rely on the agency too much, because that’s just creating a new silo. They need to use the agency as a way to increase internal skill sets”

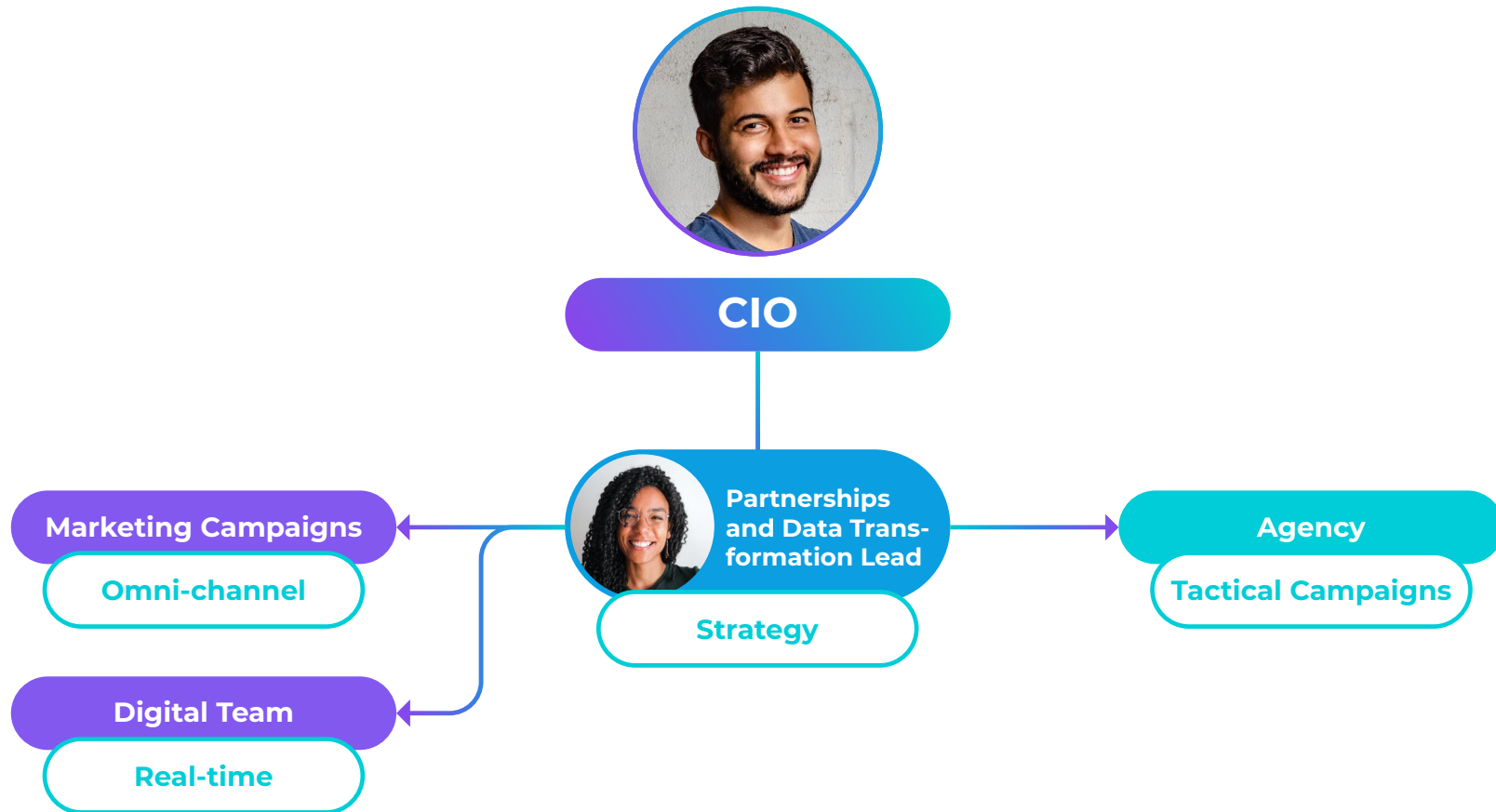
– Robin Geier, Senior Consultant Value Engineering, Tealium

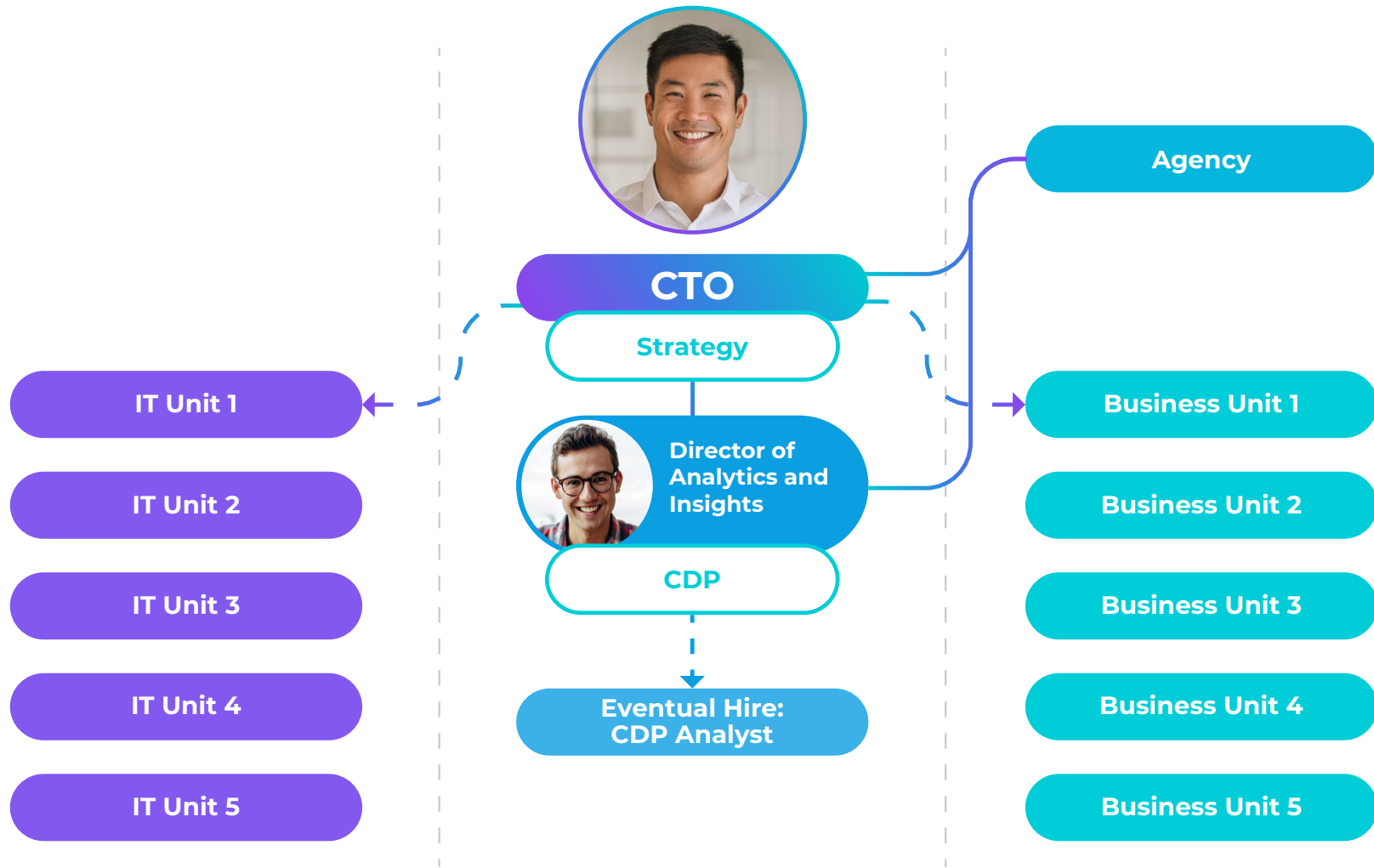
“[Our agency partner] has bought us time until we figure out what we need to hire for ourselves. The resources you need today won’t be the resources you need in three months, and [our agency partner] helps get over that hurdle. Then we will invest in our long term data program.”

– Sports and Entertainment Media Company, CTO

“With a CDP, because you’re leading with data and have consolidated all the first, second and third-party data into one pool, the historical siloed marketing activities don’t happen. We transformed the teams just for data. The CDP would be used by the marketing campaign team across all channels. The CDP would be ‘always on’ with the digital teams, and our agency partnerships manage the CDP for tactical campaigns and special events.”

– Partnerships and Data Transformation Lead, Railway Transportation Company, EMEA





10 CDP Team in Highly Regulated Industries

Companies in highly regulated industries such as healthcare and financial services have an added layer of complexity when organizing their CDP teams due to the types of data they work with and regulations. Data governance and privacy compliance teams need to be included at a very early stage for every use case, and then in an ongoing and regular cadence, to ensure proper compliance with global laws and standards. While it can seem daunting, highly regulated industries are also seeing some of the most significant benefits from implementing CDPs.

Organizations in highly regulated industries should have the Data department manage their CDP and customer data team to ensure proper and compliant use of the data. IT is another option for ownership, as is Marketing, because these departments also have incentive for maintaining compliance. Ultimately, if your organization faces large global privacy requirements, you'll need to make sure there is tight coordination with your Legal department.

“The virtual visits concept has taken digital experiences further. A new change of mindset is needed now that healthcare orgs have to transition to delivering those offline experiences online and being HIPAA compliant.”

– VP Analytics & Data Strategy, Healthcare Agency

“Data sources, data connections and data security are all top of mind for any healthcare organization, both on the patient and stakeholder end as well as the caregivers themselves. So Tealium is great to connect the dots between different martech systems to do personalized communications.”

– Senior Solutions Architect, Healthcare and Pharmaceuticals Consultant

A financial services CMO who participated in [a global economic impact study conducted by Forrester Consulting](#) on behalf of Tealium shared, “We don’t know what the future will bring, and we need to be flexible to adapt to different situations that could happen in the future. Tealium is flexible and agile — it’s 100% cloud and 100% secure.” With Tealium, customers emphasized more ownership of customer data and more control over their tech stack.

“One of the aspects of data governance compliance is knowing what data is being processed, where the data is being processed and who has access to the data. Having good data governance plays a critical role in achieving privacy compliance. We need to be in compliance with data governance to achieve ‘privacy compliance’. Because a CDP allows an organization to consolidate data, in general terms, into one place and report and control the data, a CDP helps organizations achieve compliance.”

– DJ Landreneau, Director of Data Privacy Strategy, Tealium

A CDP can help highly-regulated organizations ensure all customer data is secured in a compliant-ready private cloud environment. This requires the Compliance and Legal team to be actively involved in the management of the CDP to ensure all the proper steps have been taken to maintain compliance. Data privacy practitioners also want a view of their customer data across every channel to more easily comply with emerging privacy regulations. By creating a single source of trusted customer data, a CDP can help ensure privacy preferences are collected, met, and honored throughout all channels. Marketers can then operate with confidence that their campaigns will not put the organization or their customers at risk.

“Machine Learning and BI teams have to get involved to understand workflows between the CDP and Data Lakes to make sure they are meeting regional compliance issues. The CDP should not be their new data lake, but should work in harmony with those other systems.”

– Jay Calavas, Chief Innovation Officer, Tealium

“Finance companies have a lot of regulations and so they are risk averse and want to lean into consent. We have created a lot of structures around GDPR. Coming into the U.S. there are all these other regulations and so we need a consent forward approach to privacy.”

– Global Head of Marketing Analytics, Global Technology Services Company

“We have a large focus on keeping customer data secure, getting their consent, and being a trusted partner to whom they can give that data. The key to getting their data is building trust and building a value exchange. It’s on us to make sure the value exchange is clear and that we deliver on all the ways we can use data to give them a better experience and help them get approved for funding.”

– Senior Data Analyst, Financial Technology Firm



Finding Success

How to Get Started Building Your Team and Tips for Finding Talent

While it may be ideal to hire or transfer employees with CDP experience to your team, that may not always be possible. When you are building out your team (regardless of the structure you select) you should really seek out candidates who have experience with data, can work cross-departmentally, and have good communication skills.

Regardless of whether you're hiring internally or externally, there are three key characteristics of a successful CDOPs team member (someone using the CDP daily):

1. A knack and appreciation for data and analytics
2. Technical aptitude to effectively communicate what use cases the tech team needs to build out
3. Strategic visualization to understand and identify use cases and the bigger picture

“There will be people who get really excited about the CDP and that is the signal a company should look for when hiring, because those people will drive it. If someone doesn't have the mindset to go the extra mile they aren't right for this time. They have to be able to see the different opportunities the CDP unveils, beyond just their own channel.”

– Robin Geier, Senior Consultant Value Engineering, Tealium

“[When I was hired] I knew that I wouldn't be so much involved in developing the [CDP] system, but what intrigued me was building the vision around it, getting the most out of the data, and making things possible that haven't been possible before.”

– Senior CDP Project Manager, International Retail Company



Identifying Candidates Internally When You Plan to Upskill

- Already understand the business and could potentially have a shorter learning curve
- Understand data or have done reporting
- Have experience implementing and using software
- Have passion and curiosity
- Possess strong communication skills



Hiring Externally (and Likely Upskilling)

- Look for people with MOPs, CRM, or data analysis experience
- Ask how they would approach a software implementation and or examples of other data related projects
- Have a plan for training them immediately, using training offered directly by the CDP. It is ideal to have your own training or certification for best practices
- Post in communities [like Tealium's](#) to obtain advice from peers on where they've found ideal candidates for CDP roles



New Titles and Roles You May Encounter

Some New Titles Arriving on the Scene

- Marketing Technology Analyst
- Digital Architect
- Marketing Architect
- Marketing Data Engineer
- Data Supply Chain Specialist
- Strategic Audience Manager
- Customer Journey Architect
- CDP Audience Manager
- CDP Technical Lead

“Sign them up for the training that Tealium offers if they’re identified as the CDP ‘expert’ for the company.”

– Senior Data Analyst, Financial Technology Firm

“The evolution of teams within organizations implementing a CDP has involved looking at the capabilities of current employees and creating roles around the desired CDP outcomes. It has resulted in new titles we have never heard of before.”

– Eugene Coleman, Vice President of Strategic Services, Tealium

Creating Successful Communication and Shared Incentives

Opening new pathways of communication across your organization is one of the most important components of successful CDP implementation. The CDP, as we've outlined, requires a new team dynamic that aligns with every department's goals and objectives, KPIs, and ability to impact future growth of the business as a whole.

"I use a sandwich approach to communication. I work with the people in the trenches, like IT, who will be hands on, doing the tagging, preparing for the end of cookies, and seeing the value of the CDP directly. I then work with people at the top to communicate value with internal business leaders. The understanding and buy-in from both sides then trickles into the middle."

– Global Product Manager, Global Pharmaceutical Company

New communication techniques must involve:

1. Establishing buy-in and creating champions in each department
2. Identifying and prioritizing use cases to ensure everyone is aligned and success will be measured
3. Defining clear roles and responsibilities ensures clear 'swim lanes' which will reduce duplicative processes and team frustration
4. Determining a cadence for communicating to stakeholders on success, progress, and the roadmap

Popular Communication Tools

- Slack for interdepartmental communication – you can create specific project channels
- Jira for the day-to-day task and project management
- Dragonboat for product management
- Confluence as a team workspace where knowledge and collaboration meet
- Zoom for virtual meetings

"One major reason to publicize success is to get other departments to come on board and use the CDP. They have to collect the success metrics to show these teams how it benefits their own interests."

– David Raab, Founder and CEO of the CDP Institute

"We hold "curiosity sessions" where we bring in people from outside the company - like people from Tealium - to educate the company on the CDP and get buy-in across departments."

– Head of Marketing Operations, Global Pharmaceutical Company

Building Use Cases Across Departments

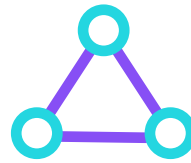
One key take-away during the interview process for this eBook was the importance of selecting the right use cases. The use cases you choose could determine the success of your CDP implementation – so you need to make the right decisions out of the gate.

Three Steps for Selecting the Right Use Cases



1. Start with one to three initial use cases and build from there

- Don't try to boil the ocean with too many use cases at the onset. Instead, define one or two that are simple but can make an impact on the business
- Engage your CDP customer success managers, agencies, and consultants for insights and support
- You can also check out Tealium's eBook, [Joy of Data](#), which highlights many successful customer use cases



2. Identify use cases across departments to get the most ROI out of your CDP

- Use communication strategies to avoid becoming siloed in one department
- Aim for the Data Center of Excellence department structure as it makes identifying and implementing use cases easier and more effective



3. Take a baseline to measure the success of your use cases

- Identify measurement metrics and set up proper tracking at the beginning to ensure you can quantify your success
- Hold regular meetings and report on campaign performance to all stakeholders

“Align the top three specific use cases that bring value to the business and make sure the results are quantifiable and the measurement methodology is agreed upon upfront.”

– Senior Marketing Manager, Financial Services Firm

The Importance of CDP Champions

CDP Champions are the superstars who will lead the charge within the organization, build out the new channels of communication, get cross-departmental buy-in, and ramp up the excitement as the team dives into this new era of technological opportunity. Due to the importance of a CDP Champion, we recommend organizations have more than one CDP Champion as their departure can result in information and knowledge losses.

First item on the agenda: If you are the champion, go find another champion to join you!

“We are seeing champions typically come from Analytics or Marketing, like paid media or CRM operators.”

– Danny Moschke, Lead Customer Success Consultant, EMEA, Tealium

If you lose your only champion, look for either a person internally who is involved with your CDP implementation or has a significant stake in the use cases. As mentioned, when a champion leaves, you may also lose foundational knowledge, therefore it is important to document key processes and best practices so other team members can step in upon their departure.

Also, communities ([like Tealium's](#)) can help your CDP team get answers to questions and quick guides to set up your Tealium software as you build this internal expertise.

Plan for Your Future Evolution

“The pilots have shown success. We’re still waiting on some of the cooler things we plan to do later – like greater personalization and an interactive studio. But we wanted something in place that is scalable for us to operationalize Tealium to empower our teams to use the CDP however they need to.”

– Global Product Manager, Global Pharmaceutical Company



Embrace the Future of Customer Data and CDPs

Remember years ago when marketing automation entered the scene? Many people disregarded their value, only to have these platforms revolutionize the way companies engage their target audiences. It was the beginning of personalization and communication at scale. Organizations who were early adopters created significant advantages over their competitors as this technology took its hold.

The same is now happening with Customer Data Platforms. The need for a CDP is growing at exponential speed due to consumer demands for amazing, trusted experiences, third-party cookie loss, and expanding global data privacy regulations, among other reasons. CDPs will become a critical platform in any organization's Martech stack. Of course, CDPs alone are not enough. You need the right people, processes, use cases, and teams in place to make your CDP deployment a success. If you build the right team to support your CDP implementation, you will be taking the most important first step to a successful CDP future.

“Don't be afraid to lean in.”

**– Head of Marketing Operations,
Global Pharmaceutical Company**

“We are really excited about the things we're going to do in the next two to three years with Tealium, but even more excited for the next five to seven years. Tealium is the foundation for how our company will evolve and will be what we use to power experiences in the Metaverse and Web 3.0. We have our three year personalization goals, but really it's much bigger than that.”

**– Global Product Manager, Global
Pharmaceutical Company**

Looking for more information on how to kick your CDP into warp speed?

Download one of our industry specific CDP Starter Kits! Everything you need to successfully plan, evaluate, and implement your CDP.

[The CDP Starter Kit for Financial Services](#)

[The CDP Starter Kit for Retail](#)

[The CDP Starter Kit for Healthcare](#)

*Don't see your industry?
No problem! Download our [CDP Starter Kit for everyone!](#)*

[The CDP Starter Kit for Travel & Hospitality](#)

[The CDP Starter Kit for Sports & Entertainment](#)

In these kits, you will discover:

- **A checklist of considerations** as you look to launch a CDP
- 6 tips for buying a CDP, including **Getting Buy-in and Aligning your Organization**
- **3 use cases** to get you started
- How Tealium customers achieved amazing results through their customer data

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Tealium connects customer data across web, mobile, offline, and IoT so businesses can better connect with their customers. Tealium's turnkey integration ecosystem supports more than 1,300 built-in connections, empowering brands to create a complete, real-time customer data infrastructure. Tealium's solutions include a customer data platform with machine learning, tag management, an API hub and data management solutions that make customer data more valuable, actionable, privacy-compliant and secure. More than 850 leading businesses throughout the world trust Tealium to power their customer data strategies.

For more information, visit

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