

# Actionable Insights:

## The CDP Playbook for Data Teams



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# Introduction

## Prioritize strategy and analysis over implementation and enforcement

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*“If the median Fortune 1000 business increased the usability of its data by just 10%, it would translate to an increase in \$2.01 billion in total revenue every year.”*



In this era of digital transformation, businesses are producing more data than ever before. But without proactive processes and infrastructure in place, your data will degrade into chaos.

With so many disparate systems managing many sources, definitions, and metrics, data teams are spending too much time cleaning and maintaining the data across the organization, and less time on the valuable insights that drive revenue.

For any data team struggling with hard-to-trust data, a customer data platform (CDP) is invaluable. A CDP acts as a single source of truth for all first-party customer data to flow through. It collects, cleans, and organizes all customer data and sends it exactly where it needs to go.

Good customer data drives growth, and CDPs are essential to activating on good customer data. The platform enables data-driven decision making, faster innovation, customer-centric thinking, and personalized customer experiences. The world's most innovative companies use CDPs to empower data teams – and every team in their organization – with reliable customer data.

# What is a customer data platform?

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

## Data collection

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

## Data governance

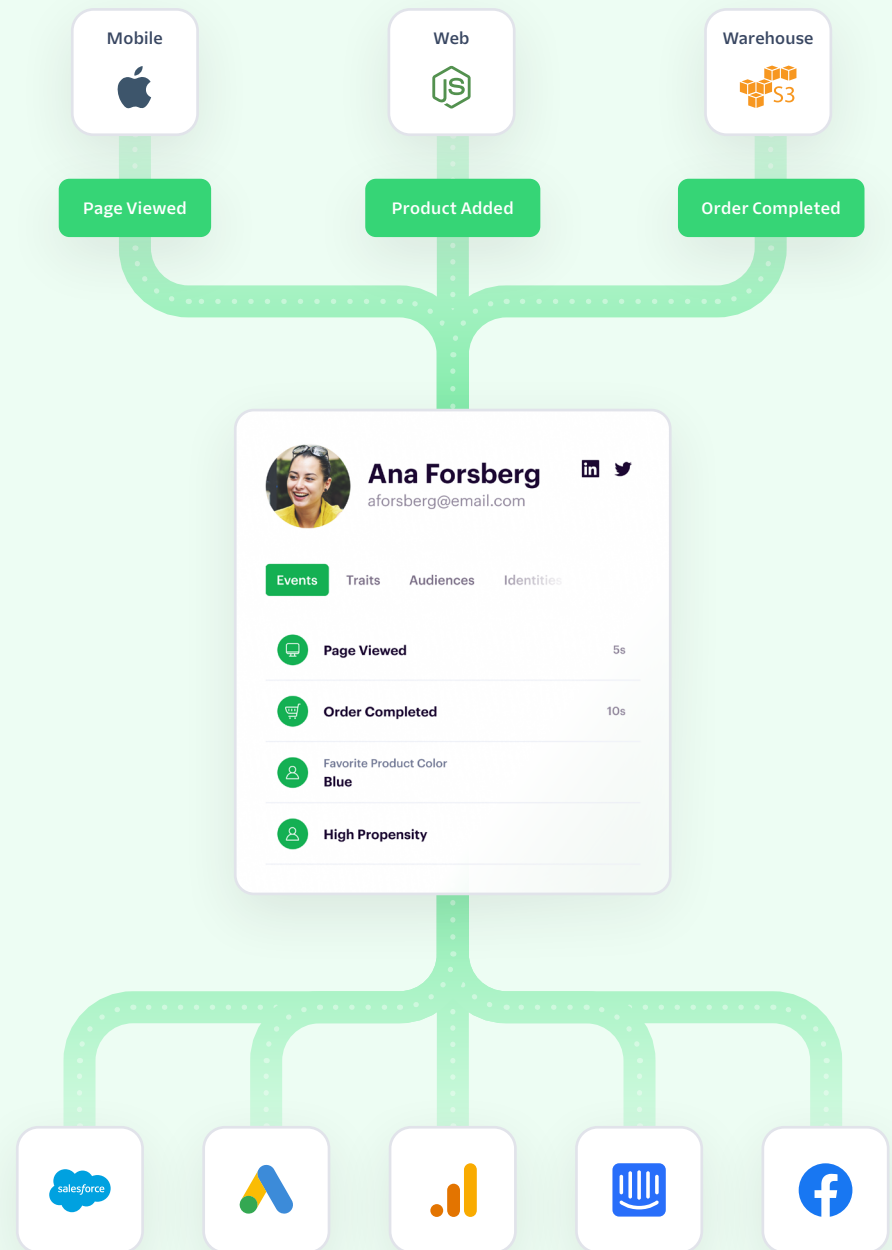
Standardizing your data to ensure accuracy, reliability, and privacy compliance.

## Data synthesis

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

## Data activation

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



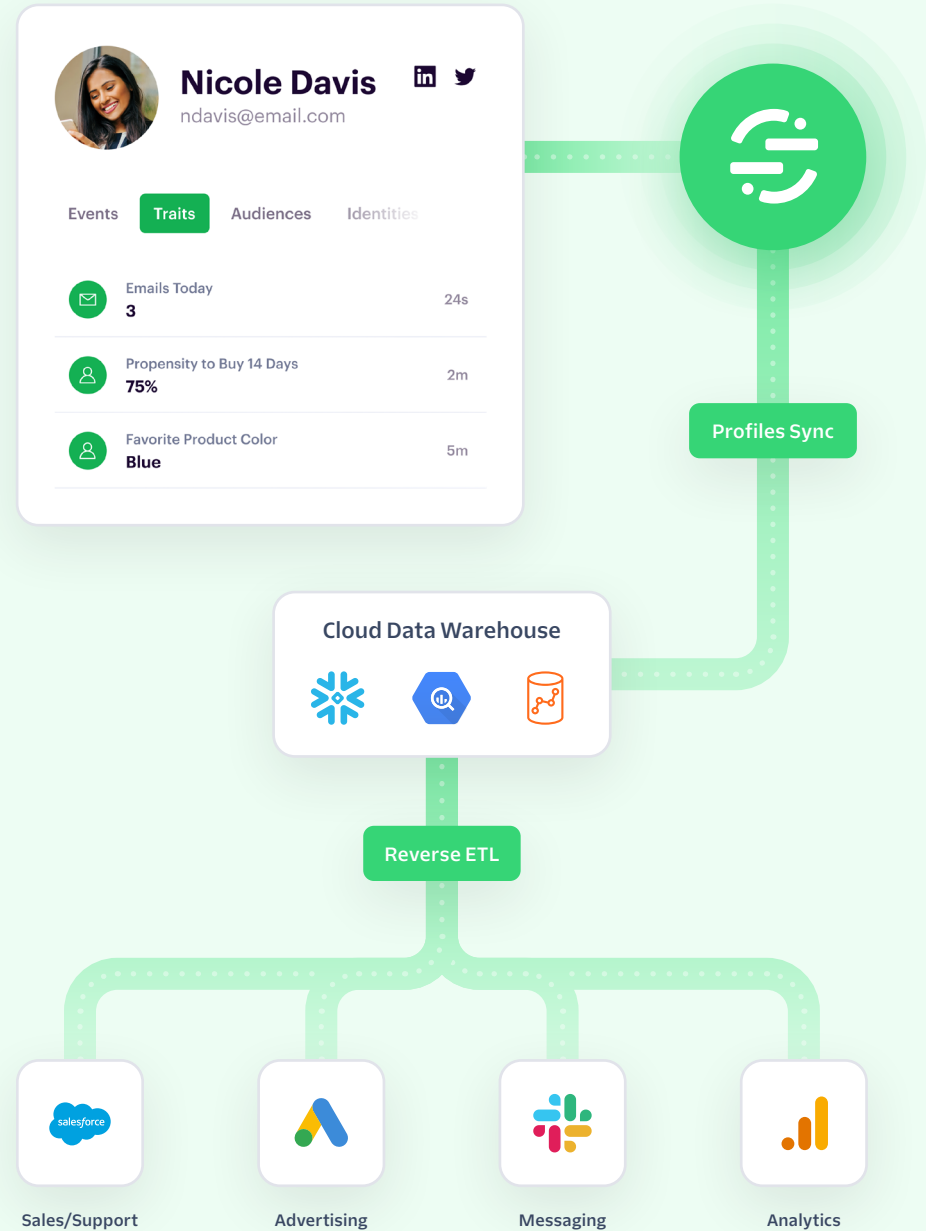


# Why your data team needs a CDP

CDPs make it easier for data teams to collect, manage, and use customer data. This single source of truth streamlines workflows, ensures accuracy, and empowers all other teams in the organization to better utilize customer data.

Data teams can unlock advanced analytics with [Profiles Sync](#), which merges the complete activity history of each customer across web, mobile, and other digital touchpoints into a single, identity-resolved profile. This automatically provides you with complete, trusted, and consistent customer profiles in your data warehouse.

With access to real-time profile data in your warehouse, teams can build data models and machine learning models that can be used in campaigns to lower customer acquisition costs, increase lifetime value, and inspire engagement.



# AI and the role of quality data

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Data quality is one of the most fundamental factors in the success of any AI initiative. The quality of your data has a direct impact on the outcomes of your AI models. If your data is incomplete, inconsistent, or inaccurate, your AI model will produce unreliable results. High-quality data, on the other hand, leads to accurate and effective AI solutions.

Data quality is not a single characteristic but a combination of several critical aspects, including:

- Accuracy, or whether the data correctly represents reality.
- Completeness, or whether any crucial data is missing.
- Consistency, or whether the data aligns across different systems.
- Timeliness, or whether the data is up to date.

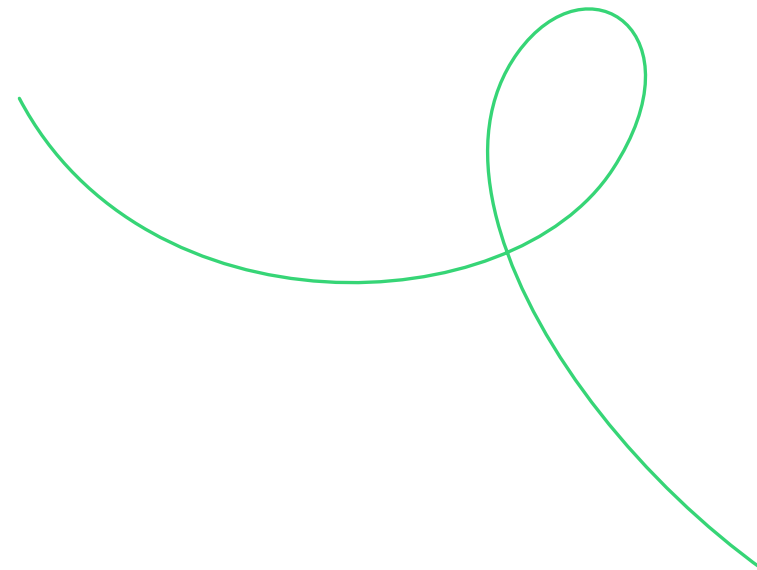
## Deepen your understanding of each customer with contextualized customer data

Linked Profiles enables data teams to map a Data Graph that brings together the power of the Segment real-time customer data platform with the complete set of business records stored in data warehouses and lakes – promoting a deeper understanding of each customer and their relationship and interactions with your business.



Investing in data quality should be a priority for every organization embarking on an AI journey. This can involve adopting data quality management tools, establishing data governance policies, and fostering a data-driven culture that values and understands the importance of high-quality data. By prioritizing data quality, organizations can lay a solid foundation for successful AI initiatives.

**Learn more by exploring [Segment AI](#).**



# Establishing a complete trusted customer data source

Data teams use CDPs to unlock holistic customer journey analytics and accurate attribution reporting. The platform also automates data governance, enables advanced analytics, and fuels data-driven growth initiatives.



## Analytics teams **with** a CDP benefit from:

- ✓ Unified, consistent data
- ✓ Complete view of the end to end customer journey
- ✓ Trustworthy, consistent, standardized data, tracking, and reporting
- ✓ Advanced analytics and data science
- ✓ Automatic data governance
- ✓ Data-driven culture

## Analytics teams **without** a CDP struggle with:

- ✗ Siloed, fragmented data
- ✗ Incomplete understanding of the end to end customer journey
- ✗ Inaccurate, inconsistent, untrustworthy data, measurement, and reporting
- ✗ Manual data governance



# What Segment can do for you

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## Standardize data collection

As the central connector for all of your customer data, a CDP can enforce data protocols and align teams around a single data dictionary.

## Ensure data quality

By diagnosing data-quality issues with actionable reports and alerts, a CDP ensures that your data is accurate in all of the tools you use.

## Connect to leading cloud data warehouses

Sync Segment profiles to your cloud data warehouse of choice within minutes. And dive deep into product data with row-level data access in SQL, with every click and interaction neatly organized in database tables.

## Get your data AI-ready

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

*“With Segment, we’ve increased the general trust across the company now that the data is centralized and accessible.”*



Colin Furlong

Business Intelligence Analyst, Typeform

## Typeform

# **Customer use cases:** unlocking advanced data insights

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**USE CASE**

Unlock advanced, trustworthy insights.

**INDUSTRY**

Consumer Products

**HEADQUARTERS**

USA

**CHALLENGE**

Fender needed to create a single view of the customer to better understand their journey. Fender also needed to improve marketing efficiency by sharing data across teams, and increase activation for their Fender Play® app while moving subscribers from free to paid accounts.

**SOLUTION**

Fender turned to Twilio Segment to create a single source of truth by unifying customer data. Fender's marketing and product teams now query events and traits with Segment's self-service audience builder and create cohorts of users for more target messaging. API access to user profiles enables real-time personalization across Fender's website and mobile apps.

**RESULTS**

Since implementing Twilio Segment, Fender optimized its checkout process which increased the conversion rate on its e-commerce site by 3%. Fender also saw a 29% reduction in the customer churn rate for its Fender Play paid app, and a 5% increase in active paying users.

**[Read the full customer story](#)**

*“By checking naming violations in Segment Protocols against our tracking plan, a member of the team can be proactive about fixing data quality issues when someone has a critical event where they need to track conversions or trigger a marketing campaign.”*



**Claire Armstrong**

Director of Digital Product Management, Fender

# Typeform

## USE CASE

Unlock advanced, trustworthy insights.

## INDUSTRY

B2B Tech

## HEADQUARTERS

Spain

## CHALLENGE

Typeform's rapid rate of growth outpaced its ability to enforce data standards across teams. Typeform needed a partner to help quickly unify the organization around a single data tracking methodology.

## SOLUTION

Typeform implemented Segment to standardize data and enforce its overall data governance strategy. Segment Protocols automatically alerts Typeform of any data discrepancies and prevents those discrepancies from being sent to downstream tools.

## RESULTS

By hosting their Tracking Plan in Segment, analysts and marketers now have the context they need to use data effectively. Segment Protocols established a source of trusted data for Typeform and allowed teams to make smarter business decisions.

[Read the full customer story](#)

*“Until we started standardizing our data, people didn’t realize how messy it had become. With Protocols, we can be confident that data quality issues don’t happen anymore.”*



**Colin Furlong**

Business Intelligence Analyst, Typeform



# SPOT HERO

## USE CASE

Unlock advanced, trustworthy insights.

## INDUSTRY

B2B Tech

## HEADQUARTERS

Spain

## CHALLENGE

SpotHero struggled to share and combine data across various analytics tools being used by different teams. This resulted in a fragmented picture of the user journey.

## SOLUTION

SpotHero implemented Segment to establish a single source of truth for its user data and success metrics. Segment powers data inside SpotHero's stack, like Looker, Mixpanel, Google Analytics, Optimizely, and other tools. SpotHero uses Segment and Looker together to unlock user insights across the entire organization.

## RESULTS

SpotHero aligned teams on data definitions and standardized, centralized data with Segment. The powerful combination of Segment and Looker enabled SpotHero to increase conversions by uncovering insights into user purchase behavior.

## [Read the full customer story](#)

*“Instead of updating event tracking separately for destinations like Google Analytics or Mixpanel, Segment enabled us to do it in one place. This allowed us to really fine-tune our data definitions and make sure that there was alignment across all teams.”*



**Kate Owens**

Senior Business Intelligence Manager, SpotHero

# ENDEAVOR

## USE CASE

Unlock advanced, trustworthy insights.

## INDUSTRY

Entertainment, Media, and Broadcasting

## HEADQUARTERS

USA

## CHALLENGE

Endeavor's data science and engineering teams needed to integrate customer data from dozens of sources and adhere to global privacy regulations, while also limiting access to individuals based on their role within an organization.

## SOLUTION

Endeavor turned to Twilio Segment to centralize its data collection, scale its data infrastructure, and share information throughout the company ecosystem. With visibility into customer behaviors, teams use analytics and other downstream tools to generate marketing campaigns.

## RESULTS

Endeavor used the customizable and personalizable platform to build, enrich, and activate dozens of Audiences for omnichannel campaigns. Endeavor also used Segment's Identity Resolution feature to compile data across devices and channels and merge it into complete user- or account-level profiles.

## [Read the full customer story](#)

*"From an efficiency perspective Twilio Segment is a great tool because all the data looks the same. All the schema is the same so it's easy for folks to work across dozens of websites, properties and events at the same time. That brings scalability because of the way it's structured."*



**Ilya Galperin**

Staff Data Engineer, Endeavor

**USE CASE**

Unlock advanced, trustworthy insights.

**INDUSTRY**

Education

**HEADQUARTERS**

USA

**CHALLENGE**

Several different edX teams wanted to access metrics for product, marketing, and business analytics, but integrating each tool would have been cumbersome and difficult to maintain.

**SOLUTION**

edX integrated Segment to unify its customer data and easily integrate and turn on third-party analytics and marketing tools.

**RESULTS**

Segment makes it easy for edX to access consistent data, add new business intelligence events, clean up event flows, add or change existing integrations, better understand its funnel, and answer critical business questions.

**[Read the full customer story](#)**

*“Segment provides an easy-to-use on/off switch to manage our analytics services. We don’t need to deploy code or touch configuration files whenever we want to change something, which saves us a lot of time.”*



**Olga Stroilova, Ph.D.**

Analytics and Research, edX

# About Twilio Segment

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Twilio Segment is the leading CDP with more than 450 pre-built integrations to different data sources and destinations. Our platform provides companies with the data foundation that they need to put their customers at the heart of every decision. Using Segment, companies can collect, unify, and route their customer data into any system where it's needed to better understand their customers and create seamless, compelling experiences in real time.

By automating all of the backend customer data operations, Twilio Segment puts companies in a position to get the most out of their first-party data and retain customers at a higher rate.

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

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





# Recommended reading

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## The Definitive Guide to Customer Data Platforms

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

[Download the guide >](#)



## Customer Data Maturity

Whether just getting started, or looking to uplevel your existing CDP capabilities, this step-by-step guide will help you make the most of your customer data platform.

[Download the book >](#)



## Real-Time Data, Real Cost-Savings

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

[Download the guide >](#)



## Thanks for reading



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