

Unlock Personalized Customer Experience with Actable

Challenge

Actable partnered with a leading media company to assess and recommend an enterprise-wide Customer Data Platform (CDP), with Customer 360 view. The customer lacked a unified view of their customers and identity resolution, which inhibited the ability to deliver personalized experiences across their subscription, ad sales, and events businesses. Siloed technology and customer data also had downstream impact on operational workflows that hindered the ability to scale.

Solution

Actable introduced its use case-driven framework to assess current capabilities core to delivering use cases across business units. Actable led discovery with 20+ stakeholders and curated workshops across the organization to address business objectives, use cases, and data and technology gaps. Discovery sessions informed a maturity assessment across 12 capabilities spanning data management, orchestration, and experience delivery (i.e. Paid Media, Email, Site) to reveal where the customer sat among industry standards.

Actable then developed a target state architecture that contemplated Customer 360 and CDP and recommended a CDP vendor shortlist, aligned to target state. Actable leveraged its CDP vendor evaluation framework, inclusive of RFP project plan, RFP template and scorecard, to drive the vendor evaluation process for 3 recommended vendors. To ensure CDP vendors addressed key platform capability needs, Actable wrote 128 functional platform requirements, driven by use cases.

Results

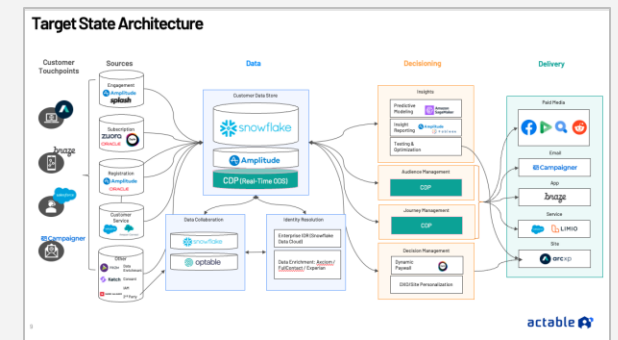
- Actable stewarded the selection process by presenting a scoring evaluation readout, with key considerations for the customer's selection.
- The customer successfully selected a CDP vendor suitable for the business and use case needs.
- Actable developed a migration and deprecation plan for incumbent solutions with overlapping capabilities to CDP
- Actable developed a recommendation on Customer 360 development as a parallel path to CDP implementation and adoption.
- Actable partnered with the customer to identify and document use case requirements to prepare for CDP implementation of the selected vendor.

Summary View: Data

RATINGS KEY

- Mature - competitive with industry standard
- Emerging - advanced capabilities generating results
- Developing - foundational elements in place
- Underdeveloped - non-competitive, basics missing
- Not developed - capability does not exist

Capability	Rating	Current-State Summary	Key Gaps and Implications
Identity Resolution	●	Home-grown process with SAP, Liffing, and Snowflake that does not consolidate users. Identity graph is created and stored in Snowflake	Not able to access identity graph of customers in real-time, only can be used by members who have access to Snowflake and can use SQL
Data Integration	●	Multiple tools are being used to integrate data across channels. The data collected is rich but the consumption of this data and processing it across all of these tools are challenging	The process is manual to maintain and change data integration. A migration to Snowflake will be heavy, but is in progress
Data Activation	●	The process to deliver customer data is manual/patch for audiences generated from ACD and CDP. High-touch steps provide automation and pre-built connectors for Paid Social/Programmatic	No data sources fully connected to outbound tools, not able to have audiences made directly in the marketing tool. Missing capabilities around triggering and automating. Also, not able to activate in a timely manner for data collected in real-time
Data Collaboration	●	Currently using the Data Clean Room (usable for their Ad Sales Teams (Alliance Partners) and are discussing more options with partners to expand capabilities.	Newly launched product will need firm requirements around data collection needs and marketing/ad use cases.
Data Collection	●	Outside of the App, there is already a large quantity of data collected across several systems. Requests for new data to be collected are accommodated	There's a lot of work required to manage the Snowflake environment - time and resources to maintain and support.
Customer Data Store	●	Existing Customer Data Store is created manually in a systems (Liffing, Dynamics, Snowflake, CDP). Only users who can use SQL can access this data or submit JIRA requests	There is not a single system of record for unified customer data.
Consent Management	●	Email opt-in lists are followed, as well as presenting and asking consent from users through the registration/subscription flow	Missing more granular permissions across each channel (preferences, etc.). Without a consent management platform, requests are supported manually



RFP Vendor Evaluation Scorecard

Evaluation Criteria		Score		Result	
0 - Non-comprehensive	1 - Basic functionality / capability	2 - Competitive functionality / capability	3 - Exceptional functionality / capability	Must Have	Weight 100%
				Important	Weight 50%
				Nice to Have	Weight 25%
		Pass - Score at least a 1	Fail - Score 0		

	Score Total	% Passed	Score Total	% Passed	Score Total	% Passed
Weighted Score	157.75	-	143	-	162	-
Aggregate Score (max score of 384)	258	94%	238	97%	267	96%
Must Have	69	97%	60	100%	70	100%
Important	166	95%	154	98%	172	98%
Nice to Have	23	80%	24	87%	25	80%

CDP Criteria	Score Total	Result	Score Total	Result	Score Total	Result
Must Have (max 93)	69	97%	60	100%	70	100%
Data Access / Ingestions						
APIs	2	Pass	1	Pass	2	Pass
Delta vs. Full	3	Pass	2	Pass	1	Pass
Import/Export Monitoring	3	Pass	1	Pass	3	Pass
Data Model						
External "deep data" access	2	Pass	2	Pass	2	Pass
Profile & Identity						
Known vs. anonymous identities	2	Pass	3	Pass	3	Pass
Persistent identifiers	3	Pass	2	Pass	3	Pass
Stitching (general)	3	Pass	2	Pass	3	Pass
Anonymous to known	3	Pass	2	Pass	3	Pass
Online-to-offline ID resolution	3	Pass	2	Pass	3	Pass
Device-based identity management	2	Pass	2	Pass	2	Pass
Derived Variables	3	Pass	2	Pass	3	Pass