CDP Vendor Comparison

About this Document

Customer Data Platform systems vary greatly in the features they provide. This document helps buyers to identify systems whose features match their needs. It does this by showing which vendors provide features that support specific use cases. We assume buyers have identified their use cases in advance.

This report does not rank systems. More features are not better. Unnecessary features add cost and complexity without creating value. If you use this report to rank systems, assign one point for each Yes on a feature you need and subtract one point for each Yes on features you don't need.

The definitions of each item are presented in the section following the table. "Yes" answers mean only that the system meets the minimum requirement in that definition. **This may not be adequate for a particular buyer's needs**. Buyers will need to explore the details of individual systems to find out.

The table is divided into two major sections.

- **Shared CDP Features** lists features present in all CDP systems. This section is included to provide a context and to help distinguish CDPs from other types of systems that buyers may be considering.

- **Distinguishing Features** lists features present in some CDPs that support specific use cases. Features relate to data management, identity management, specific channels, analytics, and engagement. The expectation is the readers of this document will understand which of these features relate to their needs.

About the Data

Data in the table is based on information provided by each vendor. The CDP Institute has reviewed vendor answers, compared them with its own information about each system, and made some adjustments to improve accuracy and consistency. But readers are still urged to validate information directly as part of their vendor evaluation process. The CDP Institute accepts no liability for information in this or related documents.

About the Vendors

Vendors listed in this and related documents are Sponsors of the CDP Institute.

About the CDP Institute

The Customer Data Platform Institute provides vendor-neutral information about issues, methods, and technologies for creating unified, persistent customer databases. Activities include publishing of educational materials, news about industry developments, creation of best practice guides, a directory of industry vendors, and consulting on related issues. For more information, visit www.cdpinstitute.org.

CUSTOMER DATA PLATFORM INSTITUTE

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	Action IQ	Acqia AgilOne	Amm TreasureData	Ascent360	BlueConic	Blueshift	BlueVenn	Bridg	Cheetah Digital	Commanders Act	Cross Engage	CustoCentrix	D&B Lattice Engines	Evergage	FirstHive	Informatica	Leadspace	Lexer	Lytics	Mastercard SessionM	Mediarithmics	mPartide	Netcore Smartech	NGDATA	Nominow	Optimove	QuickPivot	RedPoint	Scale	Segment	Simon Data	Tealium	Teavaro	White Rabbit	Zylotech
Shared CDP Features																																			
Accept All Sources	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Retain All Detail	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Persistent Data	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Unified Profiles	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Manage PII	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
External Access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Segment Extracts	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Distinguishing Features																																			
Data Management																																			
Schema-Free Data Load	Y	Y	Y	N	Y	Y	N	Y	Y	N	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y
Real-Time Data Load	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Client-Built Data Load	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y
End-User Data Load	Y	N	Y	N	Y	Y	Y	N	Y	Y	N	N	Y	Y	Y	N	N	N	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	N	Y	N	Y	Y	Y
Real Time Access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
On-Premises Deployment	N	N	N	N	N	N	N	Y	N	N	N	N	Y	N	N	Y	Y	N	N	N	N	N	N	N	Y	N	N	N	Y	Y	N	N	Y	N	N
Identity Management																																			
Persistent ID	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y
Deterministic Match	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Probabilistic Match	Y	Y	Y	N	Y	Y	N	Y	Y	N	N	N	N	Y	N	Y	Y	Y	Y	Y	N	N	Y	Y	N	N	N	Y	N	N	N	N	N	N	Y
Web Site																																			
Web Site Tag	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	Y	Y	Y	N	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Cookie Management	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	Y	Y	Y	N	N	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Mobile Apps																																			
Ingestion SDK	N	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	Y	Y	N	Y
Offline																																			
Postal Address Hygiene	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	Y	Y	N	N	N	N	Y
Name/Address Match	Y	Y	Y	Y	Y	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	N	N	Y	Y	Y
Business to Business																																			
Account-level Data	Y	Y	Y	N	Y	N	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y
Lead-to-Account Match	Y	Y	Y	N	Y	N	Y	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	N	N	Y	N	Y	Y
Analytics																																			
End-User Segmentation	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Manual Predictive	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	Y	Y	N	Y	N	N	Y	Y	Y	N	N	N	Y	N	N	N
Automated Predictive	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	Y	N	Y	N	N	N	Y	N	N	Y	N	Y
Campaigns																																			
Dynamic Content	Y	N	N	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	Y	N	Y	N	Y	Y	N	Y	Y	Y	N	Y	N	N
Real Time Messages	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	N	Y	N	Y	N	Y
Multi-Step Campaigns	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	N	N	Y	N	Y
Multi-Channel Campaigns	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	N	N	Y	N	Y
Cross-Campaign Arbitration	Y	N	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	N	Y	N	Y	N	Y	Y	Y	Y	N	Y	Y	Y	N	N	N	N	N	N	N	N	N

See following pages for definitions. Revised 04.29.2020

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Definitions	
Shared CDP Features	These features are required to be considered a Customer Data Platform. They are included to help readers asses systems not in this report.
Accept All Sources	System can ingest data from all sources (online and offline) and formats (structured, semi-structured, unstructured)
Retain All Detail	System can store any input data without losing details. This means all details associated with purchase transactions, promotion history, Web browsing logs, changes to personal data, etc. Inputs might be physically reformatted when they're loaded into the CDP but can be reconstructed if needed.
Persistent Data	System can retain all ingested data for as long as users specify (subject to regulatory constraints)
Unified Profiles	System can create unified customer profiles including all ingested detail related to the same individual (subject to regulatory constraints)
Manage PII	System manages Personally Identifiable Information (PII) such as name, address, email, and phone number in ways that comply with privacy and security regulations in the regions where it is deployed. This does not necessarily include consent management or certification against industry standards.
External Access	System gives other systems access to any data in the unified customer profiles via API connections, Webhooks or queries. Vendor assistance may be required to set up connections or to expose specific items. Results may not be available in real time.
Segment Extracts	System can select customer segments and send extracts with specified data elements to other systems. Selection rules and extracts can include any data in the unified customer profiles. Vendor assistance may be required to expose specific items and extract may not be available in real time.
Distinguishing Features	
Data Management	These features relate to gathering, preparing, and sharing CDP data.
Schema-Free Data Load	System can store any input data without data elements being specified in advance. Users may need to classify the elements after they are stored in order to access them.
Real-Time Data Load	System can load new data, update the unified customer profiles, and present the results in real time, defined as under 30 seconds from start to finish. This requirement does not include real time access to the data by other systems.
Client-Built Data Load	System lets client technical staff add new data sources without assistance from the vendor
End-User Data Load	System interface lets non-technical users add new data sources without technical assistance or writing code.
Real Time Access	System gives other systems real time access to a single customer's profile via an API call, Webhook, or query. Vendor assistance may be required to set up connections or to expose specific items. Access may require advance preparation such as reformatting data, copying it to a different data store, or building an index.
On-Premises Deployment	System can be deployed within a company's own data center or on company-managed servers.
Identity Management	These features relate to identifying which data belongs to which customer.
Persistent ID	System links personal identifiers such as email address or phone number to a permanent master ID that remains unchanged over time regardless of changes in other identifiers. Customer profiles can be accessed by any identifier linked to the master ID. CDPs that use a master ID applied outside the system do not meet this requirement.
Deterministic Match	System can link personal identifiers to an individual's master ID using 'deterministic' matches, such as email and phone number on same account, or same device used to read email and visit a Web site.
Probabilistic Match	System can link personal identifiers to an individual's master ID using 'probabilistic' matches based on behaviors, such as two devices being used in the same time and place.
Web Site	These features relate to interactions with the company's own Web site, whether on a computer or mobile device.

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Web Site Tag	System provides a Web site tag that can be loaded into the client's Web site and used to capture data about customer behaviors. The data must be associated with an individual identifier, although this may be anonymous (e.g. browser cookie, device ID).
Cookie Management	System can deploy and maintain Web browser cookies on the client's own Web site and link the cookies to customer records in the CDP database.
Mobile Apps	These features relate to interactions with applications running on mobile devices.
Ingestion SDK	System provides a Software Development Kit (SDK) that can load data from a mobile app into the CDP data store.
Offline	These features relate to interactions with offline data sources, such as direct mail and retail stores, where the primary identifier is name and postal address.
Postal Address Hygiene	System can clean, standardize, verify, and store corrected postal addresses
Name/Address Match	System can find matches between different name/address records despite variations in spelling, missing data elements, etc. All matching records are linked to the same master ID.
Business to Business	These features relate to companies that sell primary to other companies rather than consumers.
Account-level Data	System can maintain separate profiles for accounts (i.e., businesses) and for individuals within those accounts. Data for each account is stored only once, not copied onto the individual-level profiles. Selections, analytics, campaigns, and other system functions can combine data from both levels.
Lead-to-Account Match	System can associate individuals with businesses, using information such as company name, address, email domain, and telephone number. It can also create hierarchies among business records, such as parent/subsidiary or headquarters/branch relationships.
Analytics	These features relate to analyzing customer data.
End-User Segmentation	System interface lets non-technical users define segment extracts and automatically send these to other systems on a user-defined schedule. Selection rules and extracts can include any data in the unified customer profiles. Vendor assistance may be required to expose specific items and extracts may not be available in real time.
Manual Predictive	System provides tools for a data scientist or statistician to generate, deploy, and refresh custom predictive models. Connectors to external modeling systems such as SAS or R do not meet this requirement.
Automated Predictive	System lets business users generate, deploy, and refresh custom predictive models without involvement of a data scientist or statistican. Connectors to external systems do not meet this requirement.
Engagement	These features relate to creating and selecting messages for customers. Delivery is usually done by an external system.
Dynamic Content	System can generate ready-to-deliver content using templates that select different items (text, images, offers, etc.) for different individuals based on fixed rules, predictive models, or both. Content may be sent to other systems for delivery.
Real Time Messages	System gives other systems real time message recommendations for a single customer via an API call, Webhook, or query. Messages may be product recommendations, sales offers, editorial content, marketing materials, etc. Recommendations are based on customer profiles in the CDP and may access data stored outside the CDP. They may draw on rules, predictive models, or both.
Multi-Step Campaigns	System can run campaigns with sequence of messages sent over time. The messages may differ based on customer behavior during campaign. Messages may be sent to other systems for delivery. Single-message campaigns do not meet this requirement, even if the system can direct customers from one campaign to another.
Multi-Channel Campaigns	System can run campaigns that include messages across multiple channels in the same campaign. Messages may be sent to other systems for delivery.
Cross-Campaign Arbitration	System can identify when the same customer is eligible for several campaigns and select the best message across all campaigns to deliver during one interaction, either batch or real time.