Request for Proposal: Customer Data Platform (CDP)

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- Reasons for seeking CDP solution

- Primary goals for CDP implementation

2. Technical Requirements

Data Integration and Collection

- Ability to ingest data from various sources with support for structured and unstructured formats

- Real-time processing capabilities to ensure timely updates

Data Storage and Management

- Indefinite storage of customer data while adhering to privacy regulations

- Centralized database architecture for easy access to customer information

Identity Resolution

- Cross-channel identity matching to create a holistic view of customers

Security and Compliance

- Strong encryption protocols for data protection

- Compliance with industry regulations (GDPR, CCPA) including role-based access controls

Scalability and Performance

- Ability to scale with increasing data volumes without performance degradation

- High availability to ensure uptime of the platform

Integration Capabilities

- Robust APIs for seamless integration with existing martech stacks

- Pre-built connectors for popular third-party applications

Analytics and Reporting

- Features for analyzing customer behavior and campaign performance

- Customizable dashboards for displaying relevant metrics

AI and Machine Learning Capabilities

- Implementation of predictive analytics to forecast customer behavior

- Automated insights generation based on data analysis

User Experience

- Intuitive user interface that allows marketers to navigate the platform easily

- Availability of training resources to help users maximize platform capabilities

Data Quality Management
- Tools for identifying duplicates, inconsistencies, and errors in datasets

- Automated processes for maintaining data accuracy over time

3. Functional Requirements

3.1 Data Collection and Integration

Tip: Focus on comprehensive data ingestion capabilities that can handle diverse data sources and formats. The solution should demonstrate proven ability to collect, normalize, and process data in real-time while maintaining data quality and governance standards.

Requirement	Sub-Requirement	Y/N	Notes
Data Collection & Integration	Multiple source data collection (online and offline)		
	First-party data support		
	Second-party data support		
	Third-party data support		
	Real-time data ingestion capabilities		
	Structured data handling		
	Unstructured data handling		

3.2 Unified Customer Profiles

Tip: The unified customer profile capability is the cornerstone of any CDP. Ensure the solution can maintain persistent, regularly updated customer profiles that combine data from all sources while resolving identity conflicts effectively.

Requirement	Sub-Requirement	Y/N	Notes

Unified Customer Profiles	Single, comprehensive customer view creation		
	Identity resolution across channels		
	Identity resolution across devices		
	Real-time profile updates		

3.3 Data Persistence and Storage

Tip: Evaluate the solution's data storage capabilities not just in terms of volume, but also in terms of data retention policies, access speed, and compliance with privacy regulations.

Requirement	Sub-Requirement	Y/N	Notes
Data Persistence & Storage	Indefinite storage of ingested customer data		
	Privacy constraint management		
	Full detail retention of ingested data		

3.4 Segmentation and Audience Management

Tip: Look for flexible segmentation capabilities that can handle both simple and complex audience definitions, with the ability to update segments in real-time as customer data changes.

Requirement	Sub-Requirement	Y/N	Notes
Segmentation & Audience Management	Advanced segmentation capabilities		
	Dynamic segment creation		
	Dynamic segment management		
	Real-time audience updates		

3.5 Data Activation and Distribution

Tip: Consider how effectively the CDP can distribute audience data to your marketing execution systems. The key is not just connectivity, but also the speed and reliability of data synchronization.

Requirement	Sub-Requirement	Y/N	Notes
Data Activation & Distribution	Unified customer data sharing with systems		
	Real-time data activation across marketing channels		
	Marketing execution platform integration		

3.6 Analytics and Insights

Tip: Evaluate both out-of-the-box analytics capabilities and the flexibility to perform custom analyses. Consider how actionable the insights are and how easily they can be shared across teams.

Requirement	Sub-Requirement	Y/N	Notes
Analytics & Insights	Built-in customer behavior analysis		
	Predictive modeling capabilities		
	Machine learning features		
	Customizable dashboards		
	Customizable reporting tools		

3.7 Privacy and Compliance Management

Tip: Ensure the solution provides comprehensive privacy controls that can adapt to evolving regulations while maintaining efficient data governance. The system should demonstrate robust consent management that can handle complex privacy scenarios across different jurisdictions.

Requirement	Sub-Requirement	Y/N	Notes
Privacy & Compliance Management	GDPR compliance tools		

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