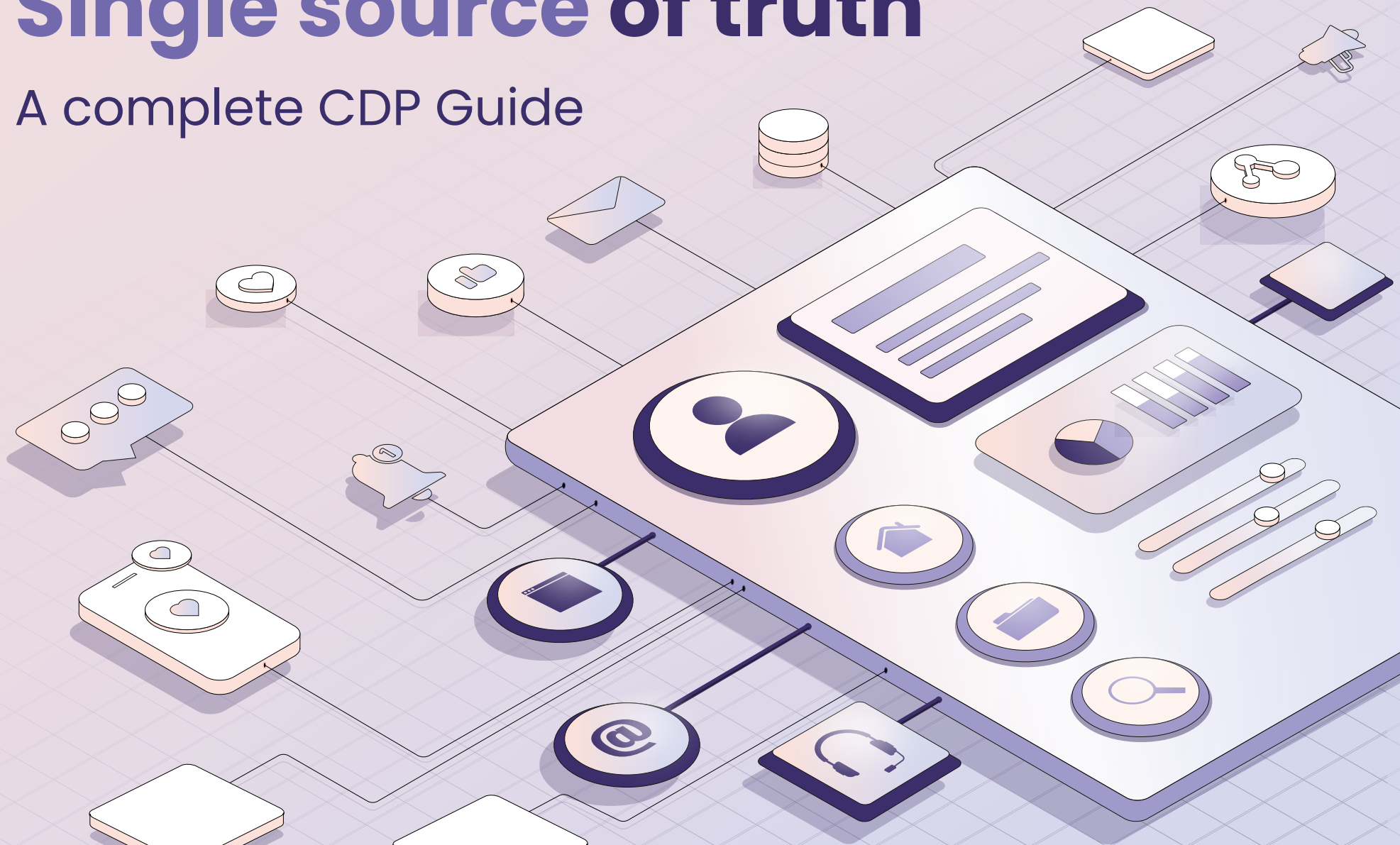


# Single source of truth

## A complete CDP Guide



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# Single Source of Truth

Data is not the new oil; Oil was the new data.

**Confused?**

**Our world revolves around data. Always has. Always will.** Early humans discovered the value of data long before they discovered oil.

Animal tracks, cave paintings, pyramids, etched figurines, and weather patterns were all forms of data early humans used for creation, survival, and livelihood.

Today, about 328.77 million terabytes of data are created every day, and 120 zettabytes of data will be generated this year. This sheer volume of data powers businesses, even whole economies.

Marketers worked with little or no data on gut alone for the longest time. Shortly after, they moved to famously (or rather infamously) using third-party data from cookies to show you ads you are likely to click on.

However, cookies are fading into oblivion as we collectively drift towards a cookieless world – a future that's a blessing in disguise.

# Need for CDP

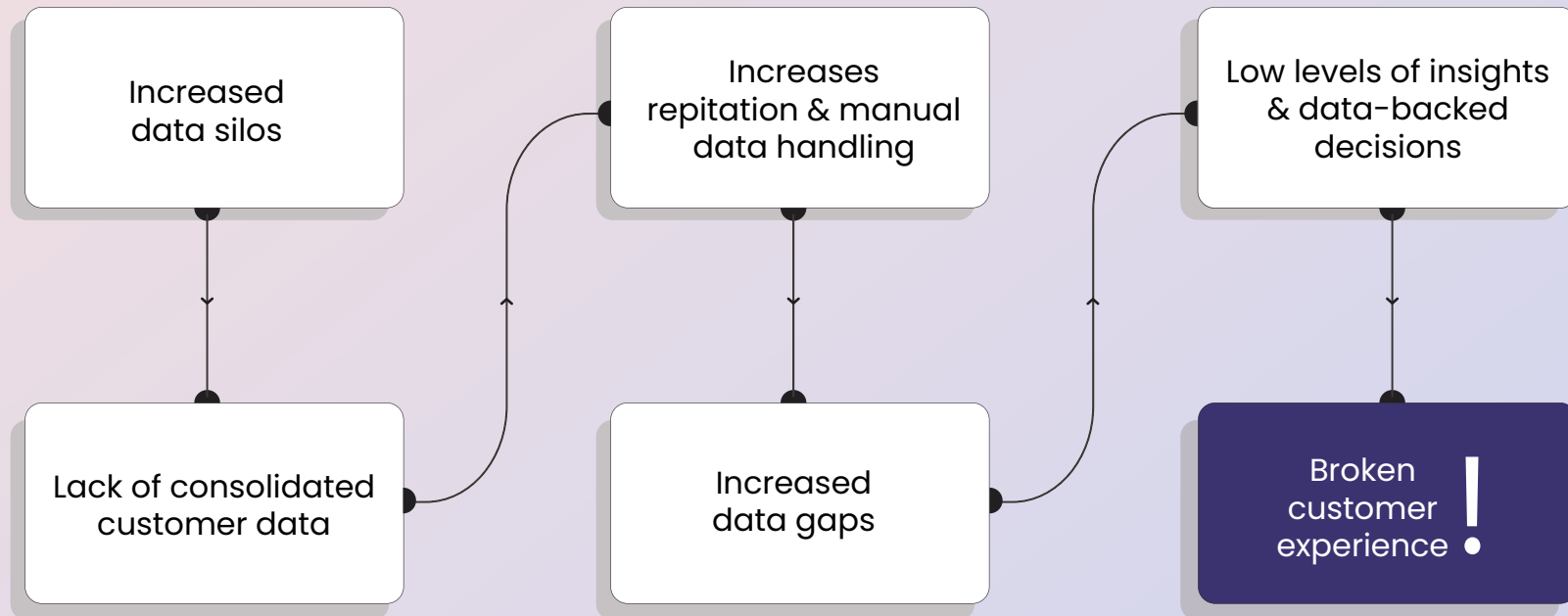
**To join the cookieless revolution**, businesses have been investing heavily in first-party data because it's authentic, company-specific, and invaluable.

First-party data delves into the minds of your users and shows you what they like or dislike, how they are likely to behave, and what they are likely to buy.

Money is being pumped into setting up data infrastructures that can support the collection of first-party data.

However, these hefty investments turn out to be stopgap solutions because those data systems, more often than not, fail to communicate with each other and operate in silos; they don't make good on the promised outcome.

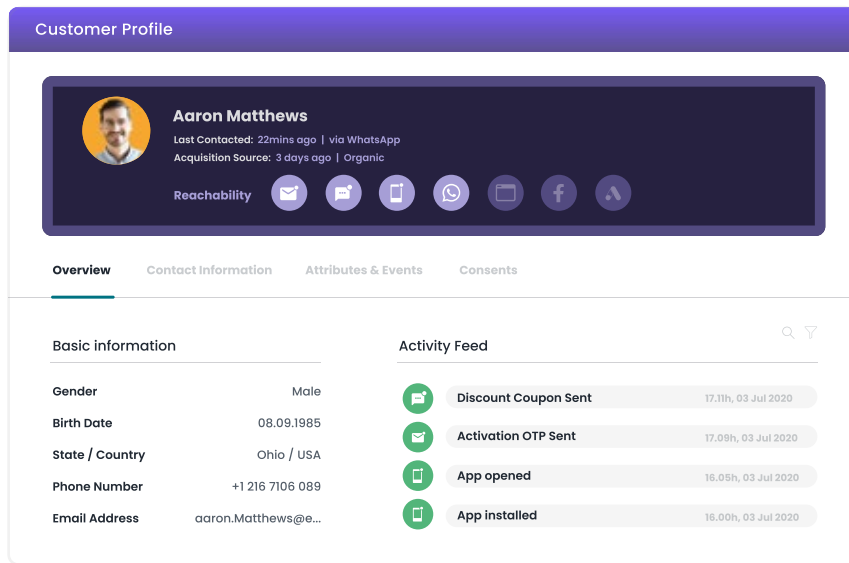
When these data systems fail to interoperate, they fragment the system. Fragmentation causes gaping holes and widens data gaps leading to a fractured customer experience.



## **This is where Customer Data Platforms (CDPs) prove to be a saving grace.**

In this guide, we walk you through the ins and outs of a Customer Data Platform (CDP), spotlight pressing real-world use cases & case studies, and outline the step-by-step process to pick the right CDP for you.

# The ABC of CDP



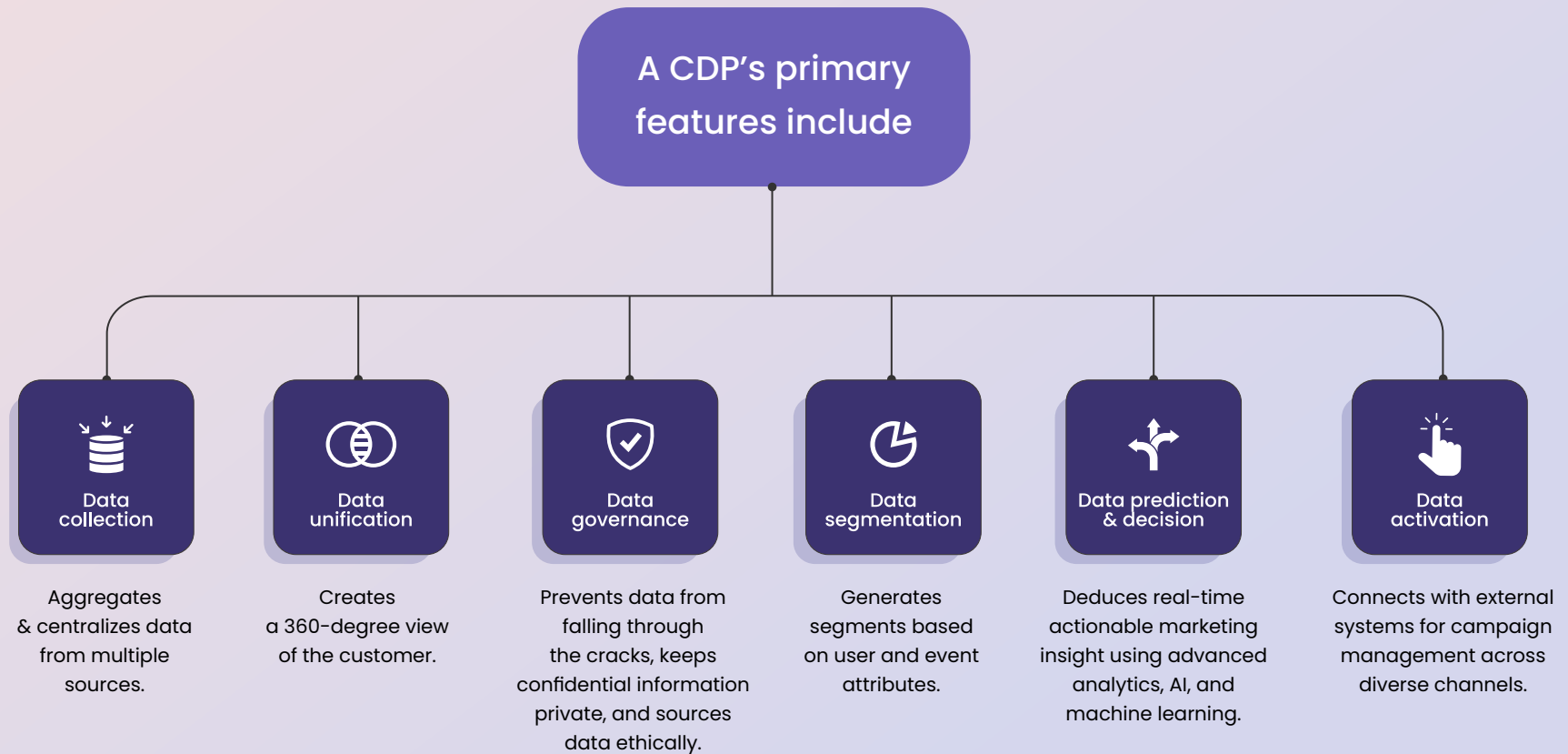
A Customer Data Platform (CDP) is a packaged software that aggregates and unifies customer data from various sources to provide a 360-degree view of a user.

This singular view of a user, powered by first-party data, shows every decision-making parameter, such as user attributes, website behavior, personal tastes and preferences, geographical location, channel reachability, and psychological tendencies, among others, on a glanceable dashboard – **a single source of truth.**

If you're wondering how it differs from a Customer Relationship Management (CRM) or a Data Management Platform (DMP), CRMs were built for salespeople to record call notes and present digestible information for customer-facing interactions, whereas DMPs were built to pursue third-party data (like cookies).

CDPs can be thought of as an evolved CRM that performs the functions of a DMP but for structured, semi-structured, and unstructured first-party data. **A CDP does this and more.**

# Features of a CDP



## Some of the more nuanced features of a CDP are



### Consent & preference management

Collects and sync end-user choices about how their data is handled across marketing systems.



### Testing and self-optimization

Enables A/B & multivariate tests to improve the customer experience automatically based on successful campaigns.



### Data management

Provides better control over customer data governance and integrates identity resolution.



### Data science work benching

Allows importing and managing machine learning within the CDP using R or Python.



### Recommendation engine

Builds a channel-agnostic recommendation engine for personalized suggestions, even outside of marketing.



### Account-level aggregations

Supports account-based marketing by aggregating contacts associated with specific enterprises.



### CX channels and systems

Collects and shares customer data with customer service, sales, and engagement tools.



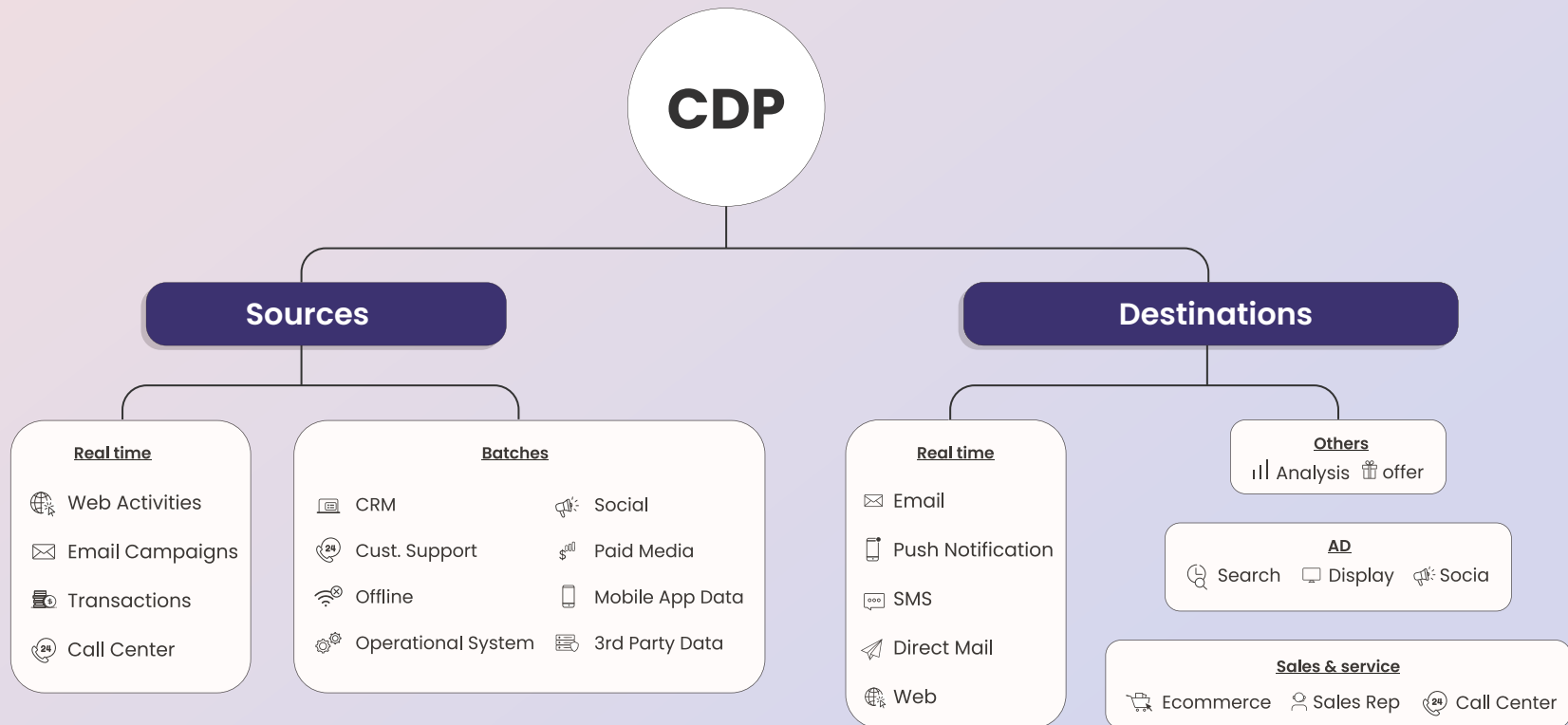
### Identity graphs & data clean rooms

Tracks web visits through partnerships for advertising measurement and activation purposes.

**It's worth noting that a CDP serves as a data democratization tool, not just for marketing but for other functions like customer service, sales, analytics, and product development.**



# The Customer Data Platform



To understand how CDP works, we must understand **how data travels through different systems.**

# Journey of data in a CDP

**The journey begins when a user performs an action.**

This user data enters a CDP from diverse sources like a website, an app, CRM, a data warehouse, Instagram, Facebook, or Google, to name a few. Note that a CDP can be integrated with one or more sources.

Next, the CDP parses the said data to create a 360° view of a customer profile replete with sufficient information to make informed decisions.

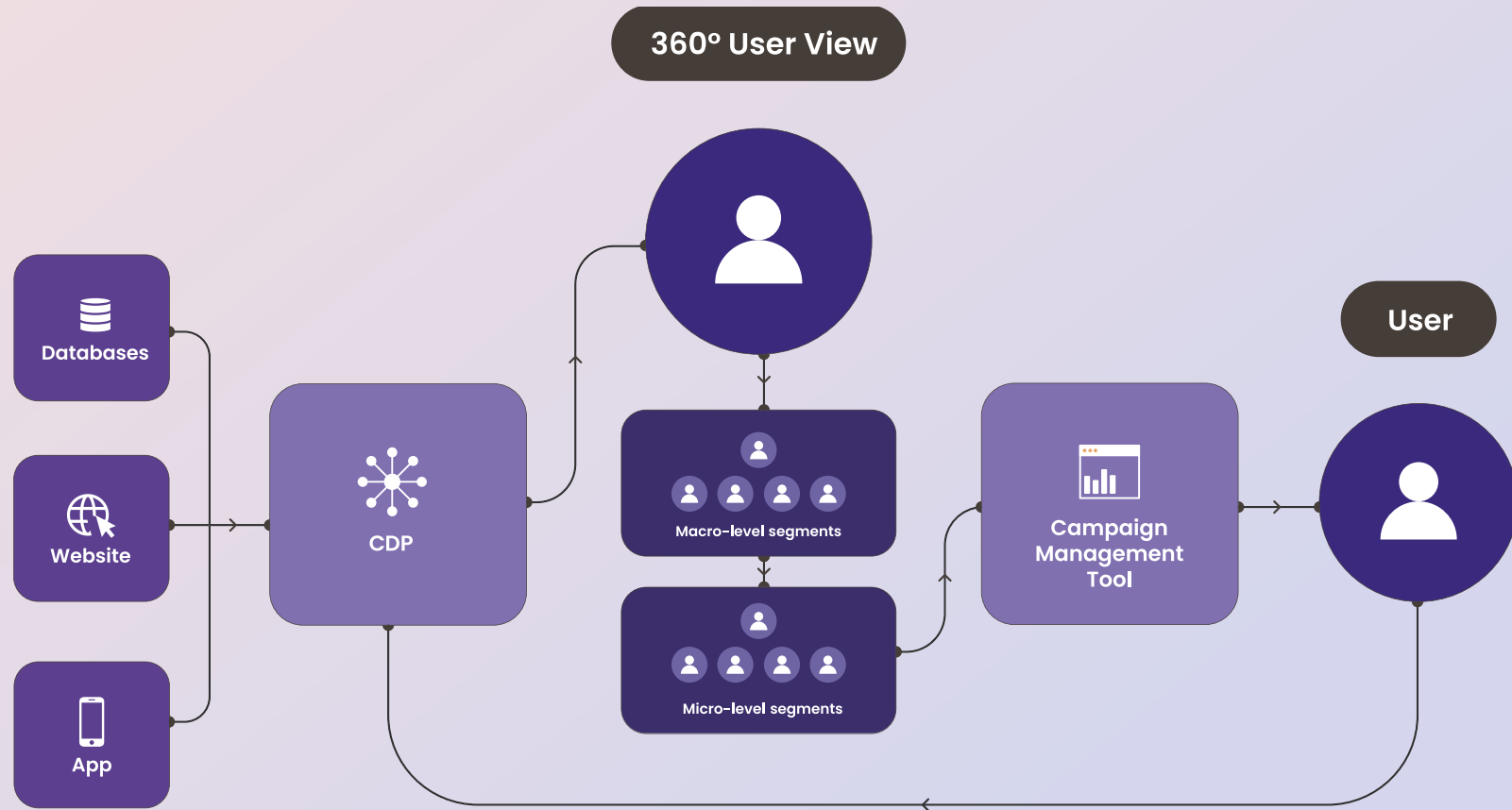
Upon creating numerous profiles of different

customers with varying tastes and preferences, it aids in grouping identical profiles into macro-level segments.

These macro-level segments are further broken down by a segmentation engine into micro-level segments, which are then fed to a campaign management tool for running campaigns across one or many marketing channels.

The data tracked from campaign performances is passed back to the CDP to update the customer profiles, thus forming a virtuous loop.

# Journey of data in a CDP



# The Data-Information-Knowledge-Wisdom Framework

As data journeys through CDP and its linked systems, it takes various forms. **Data turns to information. Information becomes knowledge, and knowledge imparts wisdom.**

This model is called the **Data-Information-Knowledge-Wisdom (DIKW) framework**. Let's demonstrate the data's journey with the help of this framework.

## **Data**

In this stage, inputs are raw and unprocessed. We don't know what these details mean unless they're processed. User attributes and user actions are recorded from several data sources and touchpoints to be passed on for further refinement.

## **i** **Information**

When raw data is converted into a usable format, it becomes information. In this stage, a CDP dissects the raw data, processes it, and gives it meaning. A CDP studies the above data, consolidates it, and presents a 360-degree customer profile.

## **Knowledge**

While information is refined data, knowledge is useful information. After creating a singular view of the user, the CDP takes other users who behave similarly and groups them into a macro-level segment using a segmentation engine. Once the CDP generates segments, it passes the said segments to a campaign management tool to run campaigns across different channels.

## **Wisdom**

When knowledge is applied, the resultant findings become wisdom. The macro-level segments created by the campaign management tool are chopped into finer micro-level segments. A micro-segment takes into account the behavior of the user along with the ability to make predictions powered by Artificial Intelligence and Machine Learning.

# Example

## Data



### User attributes:

Name: **Dev** Age: **31** Gender: **Male**  
Device: **iPhone 14 Pro** Operating System: **iOS 16**  
Location: **New York**



### User Actions tracked

#### Data source: Website

- ✔ Product - Quantity Selected (1 maroon t-shirt)
- ✔ Product - Added to Cart (1 maroon t-shirt)
- ✔ Product - Viewed (2 matching pants)



### Data Source

#### Instagram

- ✔ Product Viewed (2 pants via retargeting)

## Information

Dev, a 31-year-old male user from New York, visited a brand's website and added a maroon t-shirt to the cart using his iPhone 14 Pro. He also visited the brand's Instagram handle and checked out two matching pants.



## Knowledge



Dev, a 31-year-old male from New York who uses an iPhone 14 Pro running on iOS 16, added a maroon t-shirt to the cart and was shown 2 matching pants on Instagram.

Run an omnichannel campaign on user segment across reachable channels that he has opted in for - push notifications.



## Wisdom



Based on his tastes and purchase/behavioral pattern, he is more likely to buy those 2 pants and a pair of sneakers on the website.

Target them with a push notification.

# Data Prediction & Decision

**Customer Data Platforms** (CDPs) operate within the boundaries of their programmed rules, strictly adhering to the instructions provided. The potential for actions beyond programmed logic necessitates sentient decision-making capabilities. **Artificial Intelligence** (AI), **Machine Learning** (ML), **Reinforcement Learning** (RL), & **Deep Learning** (DL) have significant roles to play in this context.

AI/ML/RL/DL equip CDPs to manage vast data volumes, extract insights, build intelligent segments, automate workflows & make sentient predictions but on the back of robust quantifiable data. CDPs leverage these technologies to not only swiftly make informed predictions based on user attributes & past behaviors but also automate tasks with exceptional precision.

An example is post-campaign assessment, where the CDP automates marketing campaigns by analyzing customer responses & optimizing messaging strategies & channel preferences for each customer segment through AI-driven methods (more on this later). But you may ask, why go through all this trouble as an end consumer? Because a CDP is likely to have an impact on you too. It is all around us.



# What is CDP to a consumer?

As a consumer, you probably encounter CDP or a lack thereof in everyday life.

## Here are a few scenarios made possible by a CDP.



Ordering a product on an app and picking it up at the retail outlet because the two touchpoints are talking to each other.



Have you had to explain your situation to customer support every time you called them? This happens due to the lack of unified information about your case history.



Streaming applications can absorb your streaming behavior to provide tailored movie/tv show recommendations.



Finance planning apps can analyze your spending habits, saving goals, investment preferences, and businesses by sourcing data from multiple touchpoints to offer sound financial advice.

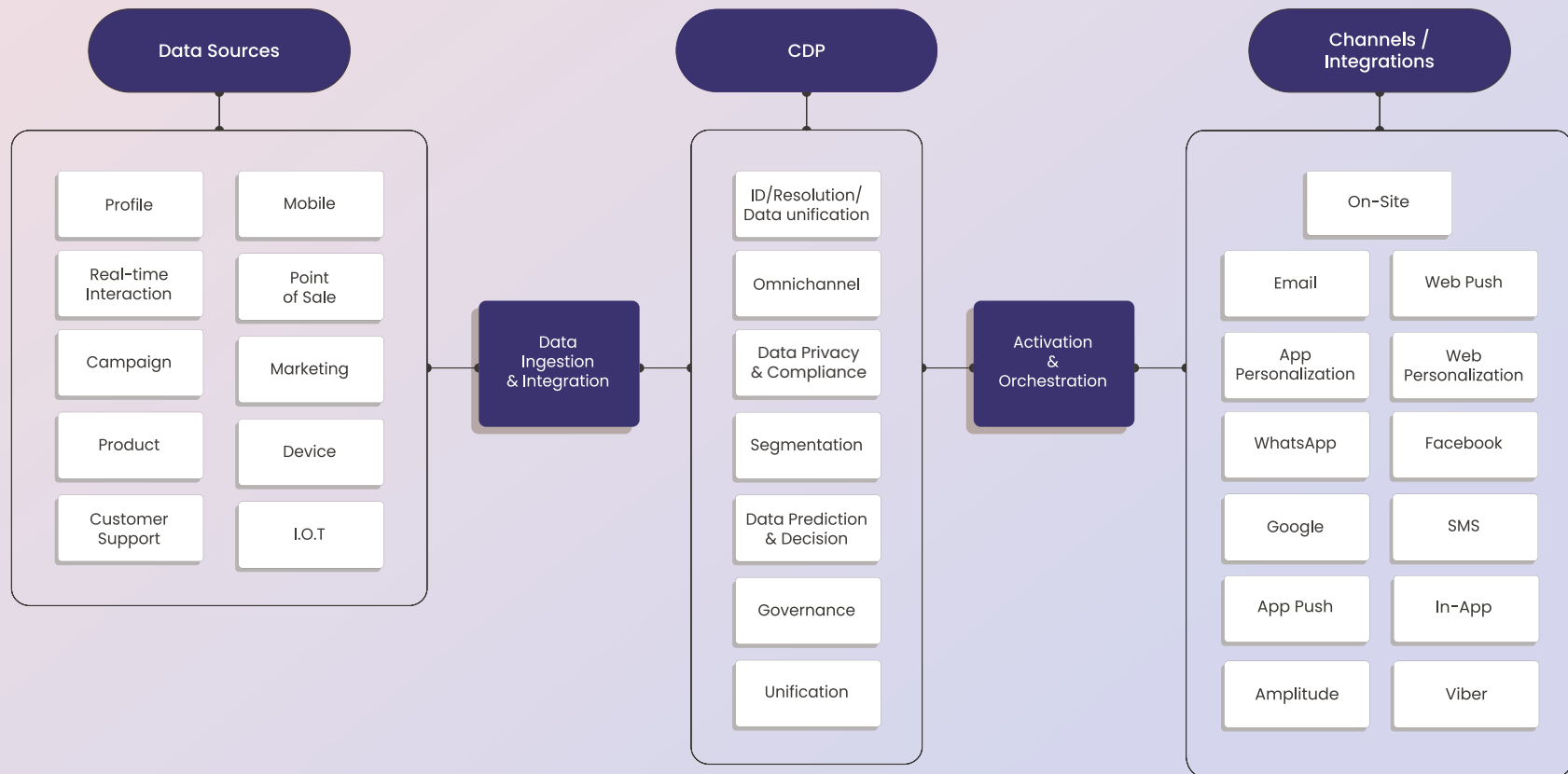


Food ordering apps can not only learn your food-ordering habits and preferences to curate your favorite restaurants, but when you're on the road, the app prompts you if you're around any of those favorite restaurants. That's the CDP in action.

# Moving parts of a CDP

A Customer Data Platform democratizes data by ingesting, integrating, managing, and delivering user data to other technology systems to personalize the Customer Experience (CX).

# How does a CDP Work?



# Let's outline each process in greater detail

## Sources

A CDP ingests data from source systems, processes it, and disseminates it to destination systems. Some of these data sources could be:

### Websites

Collecting data from customer interactions, such as page views and clicks.

### Social Media Sites

Gathering data from social media platforms, including user engagement and interactions.

### Call Centre / Customer Service Teams / Feedback Teams

Capturing customer data from call center interactions, IVRs, customer support tickets, and feedback channels.

### Third-Party Sites

Recording data from external websites or platforms through partnerships or integrations.

## **Offline Sources (Spreadsheets)**

Incorporating data from offline sources, such as manually maintained spreadsheets, logbooks, or analog sources.

## **Content Management Systems (CMS)**

Gathering data from CMS platforms, including content engagement metrics and user-generated content interactions.

## **Web Analytics Tools**

Capturing data from web analytics platforms like Google Analytics to track website traffic and user behavior.

## **API Systems**

Integrating CDP with various third-party Application Programming Interfaces (APIs) to source data from external systems or services.

## **Internet of Things (IoT) Devices**

Collecting data from IoT devices, such as smart appliances or wearables, to gain insights into customer behavior.

### **Marketing Automation Platforms**

Gathering data from marketing automation platforms, including campaign & channel-level data, lead scoring, and generation.

### **Community Platforms**

Aggregating data from customer community platforms, such as forum discussions and community engagements.

### **Servers/Databases (Physical, Cloud, Hybrid)**

Accessing data directly from servers or databases, whether they are physical, cloud-based, or hybrid environments.

### **Data Warehouses**

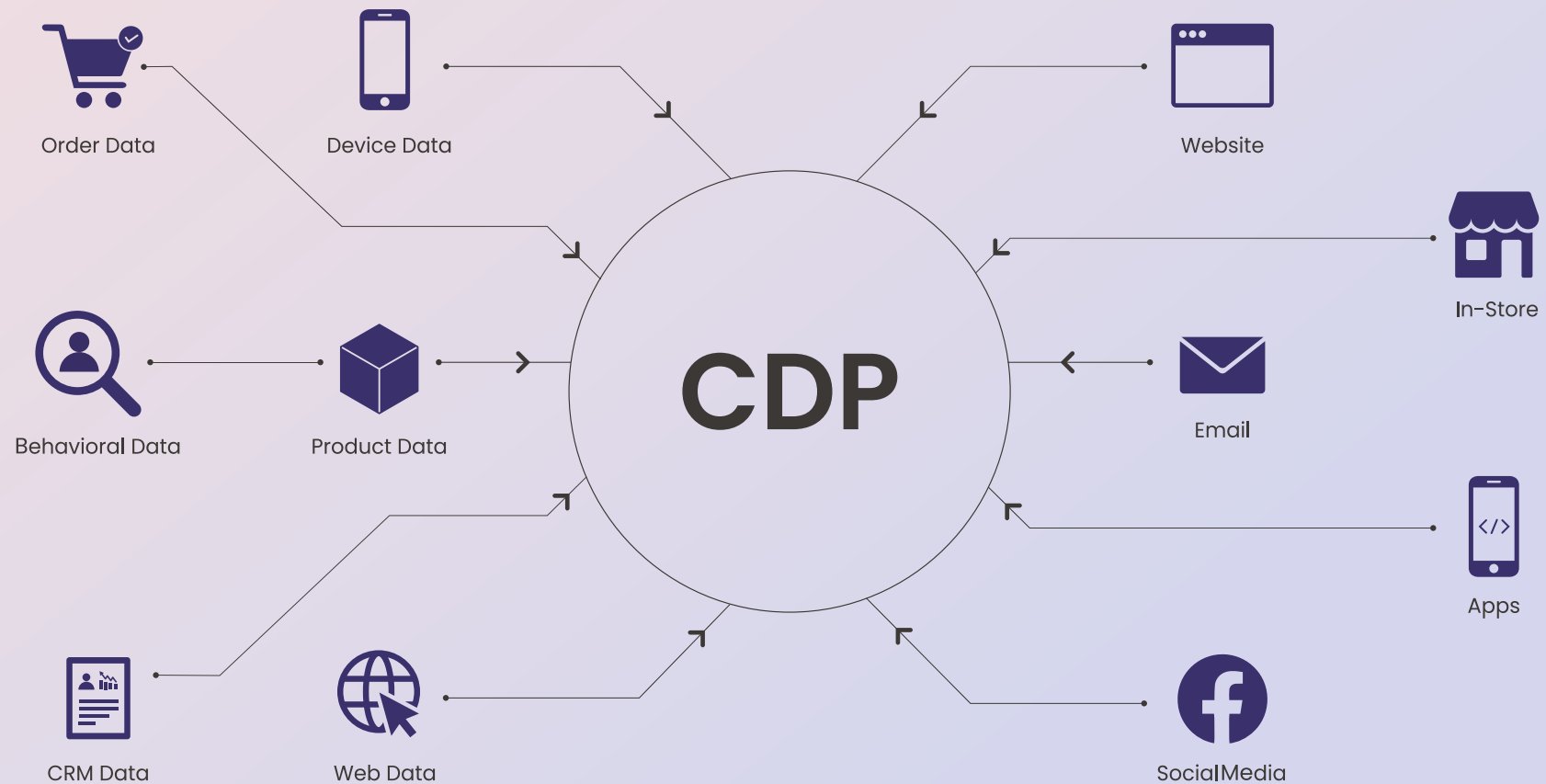
Extracting payloads from data warehouses where user data is stored, typically for analysis and reporting.

### **Point of Sale (POS) Systems**

Collecting data from point of sale systems used in retail or other industries to capture transactional data.

**These various source systems contribute to the comprehensive customer data collection and unification capabilities of a CDP.**

# Fragmentation





[79%](#) of organizations use more than 100 data sources, and [30%](#) use more than 1,000 sources.

Unfortunately, a majority of such sources are single-purpose platforms that work in isolation and are unable to access large pools of information from other systems. This isolation causes fragmentation or [death by tools](#).

About [90%](#) of companies struggle with data fragmentation, and of that, nearly [50%](#) believe it is going to deteriorate. Rising data volumes and point solutions have made it painstaking for organizations to protect or locate – let alone manage or exploit – their most important digital asset. Ignoring this problem can have negative business implications. The writings on the wall are as clear as day.

Fortunately, a CDP is designed to pull data from such siloed systems and integrate them. This lets it tie together information related to the same user from multiple sources – through integration.

# Integration

There are integration tools that can pull data from fragmented systems to a CDP and push them out to your MarTech stack.

To demonstrate the inner workings of a CDP integration, let's examine **WebEngage's lightweight CDP**.

For dynamic real-time uploads, WebEngage's CDP integrates with third-party connectors and APIs like **Google Tag Manager, REST API, Mixpanel, Amplitude, and Segment**.

Connectors are used for out-of-the-box integration, whereas APIs are used for custom integrations.

For static uploads, WebEngage also supports CSV files.

A CDP is expected to offer time-saving integrations that smoothly transfer data between source systems, marketing systems, and CDP using connectors and APIs to solve problems on data hygiene and data syndication for the customer. For those unfamiliar with data syndication:

**Data syndication is the process of optimizing the manual workflow of data, standardizing data formats to make them readable by the CDP, mapping them to requirements and delivering solutions to desired channels and marketplaces.**

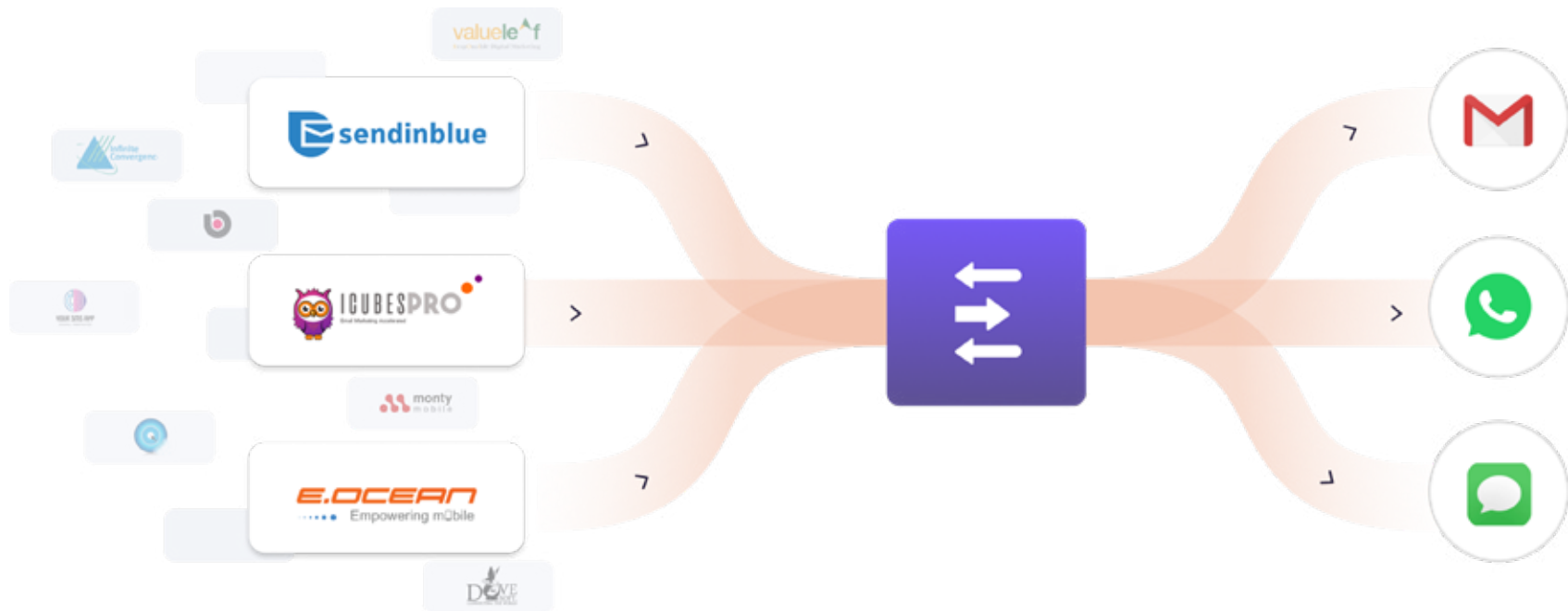
**After a CDP has been integrated with data sources, it collects information from them.**

### **AI Pro-Tip**

AI/ML has the capability to analyze input data, categorize its elements, and align them to be compatible with a CDP data model. It can make nuanced assessments and even autonomously create connectors for seamless data loading, overcoming a historical hurdle in plugging new data into a CDP.



# Collection



After integrating data sources, the next step is to collect data from the said sources.

Again, connectors and APIs not only help with integration but also with the collection of individual-level data from disparate systems. This includes gathering data, storing them in a centralized repository, sorting them out to give structure, and analyzing data to prepare for data unification.

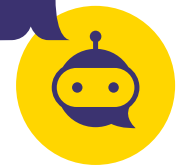
To be able to unify the collected data, its format must be consistent throughout, but that's not the case. In collecting data, a CDP ingests data from a plethora of sources in unreadable formats, giving rise to a need to standardize the data formats to make them readable and usable.

This is typically taken care of by the CDP, but in rare cases, the responsibility

is assumed by the gatekeeper of the data source that is being integrated with the CDP. The gatekeeper deploys Extract Transform Load (ETL), a process defined by a set of business rules to move data from numerous sources to a single repository called a Data Warehouse. Collecting data is vital, but how that data is collected is of paramount importance.

### AI Pro-Tip

Information is often collected in semi-structured or unstructured formats. AI can structure this data to extract specific elements such as names or dates, going beyond simple keyword searches to comprehend context and infer relationships. This contextual comprehension improves accuracy and offers more thorough insights for tasks requiring structured information.



# Governance

## Data governance deals with:

- Sourcing data ethically,
- Safeguarding user's privacy and security, and
- Identifying right data from wrong data.

### **1** Sourcing data ethically

Consumers, regulators, and policymakers alike have a growing interest in how brands use user data. Consumer interest in ownership and governance of their personal data is on the rise, and so is the need for regulators and policymakers to safeguard confidential user information.

A personalization survey showed that [76%](#) of respondents admitted to being careful about controlling how brands collect and use their personal information.

In addition, regulatory bodies are invested in how marketers use their data, as evidenced by the General Data Protection Regulation ([GDPR](#)) in Europe the Digital Personal Data Protection ([DPDP](#)) Act in India, and California Consumer Privacy Act ([CCPA](#)) in the United States. [Digital Personal Data Protection Act 2023](#). Compliance protocols like Service Organization Control Type 2 ([SOC2](#)) are already being enforced across organizations.

Increasing scrutiny and consumer friction raise the question of whether a 360-degree view of the customer is even a business necessity.

## **2 Safeguarding users' privacy and security ethically**

According to a study, [80%](#) of organizations are likely to abandon unified customer profiles because they don't adhere to data privacy regulations, rely on obsolete data collection methods, and obliterate customer trust.

Privacy is arguably the most relevant topic of the 21st century. Users know they have a right to privacy and are, therefore, indignant at being the object of privacy violations by brands. Thanks to educational reforms, the average user cares about the Personal Identifiable Information (PII) they share in the public domain, how it's collected, and what it's being used for.

Brands, on the other hand, have managed to adapt to the sweeping changes. Before collecting sensitive data, they are required secure the user's consent. The privacy revolution dispelled third-party cookies and propelled everybody into a cookieless world.

## **Here's an example of exercising data governance with WebEngage.**

When brands integrate with WebEngage's platform, they pass on sensitive user data. For full disclosure, WebEngage gives its brands the choice to either mask the PII (with encryption) of the users or share the PII without any masking. If the brand encrypts the PII, then campaign management platforms like WebEngage can still run campaigns successfully without accessing the encrypted information. There is enough wiggle room for brands to authorize and control access to confidential information using WebEngage's platform.

### **AI Pro-Tip**

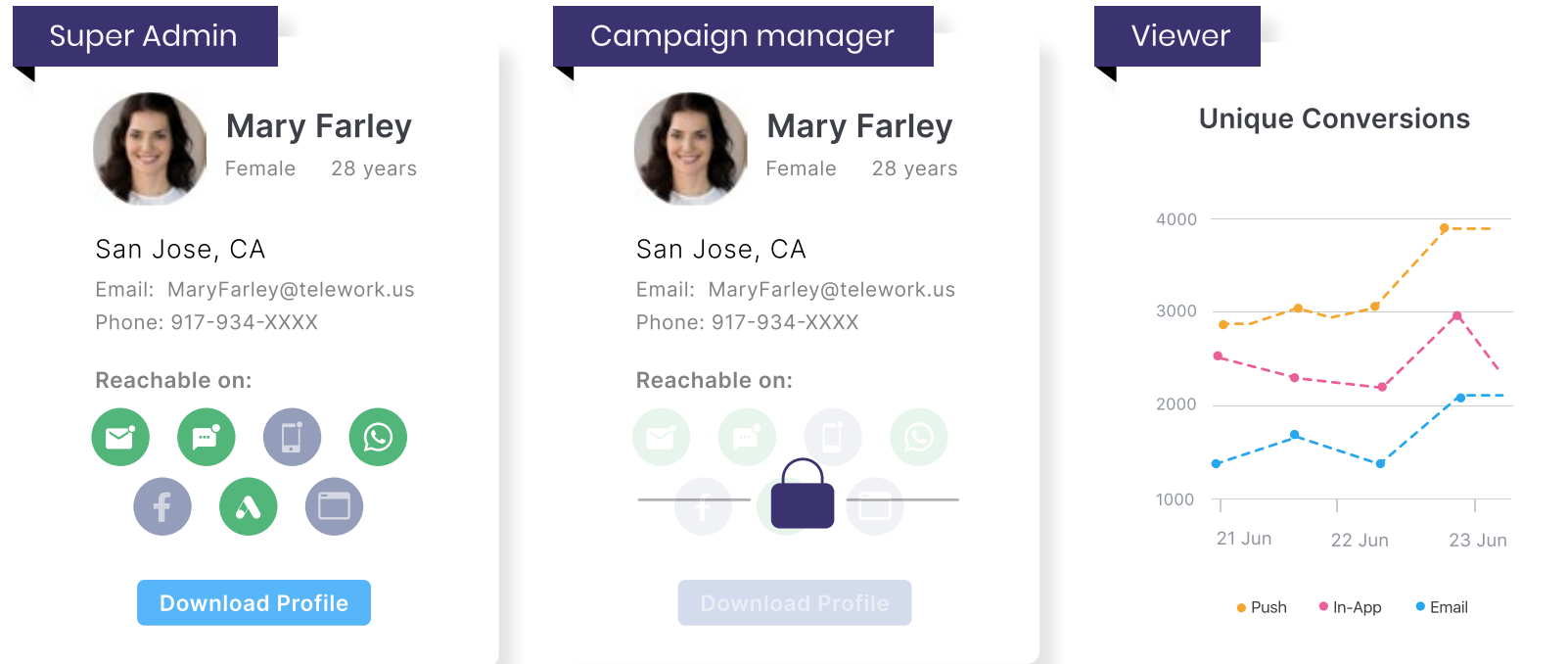
In data privacy, a crucial job is recognizing and labeling regulated data. It's tough to keep track of changes because new regulated data might join existing sources without warning. Also, when rules change, monitoring new data types or updating existing data can be tricky. AI can ease the manual workload for these jobs. In the future, AI might watch over data used to follow privacy rules, which currently needs manual effort or complex rule-based systems.







Give your customers the privacy they rightfully need and ensure data confidentiality with role-based access control and real-time alerts.



**A CDP must manage the availability, usability, and credibility of Personal Identifiable Information (PII).**

### 3 Identifying right data from wrong data

Brands can end up with the wrong data due to three critical factors:

#### ✓ **Erroneous data**

One of the more common causes of poor data quality. Transpires when the data transfer lacks standardization or as a result of stakeholders manually passing values into the destination systems. Both scenarios increase the chances of errors. Can be solved with automation.

#### ✓ **Inconsistent data**

Can pass data in different formats to the CDP (as discussed earlier in Collection). It is imperative to standardize data formats where disparate systems are involved to ensure you don't lose out on critical information.

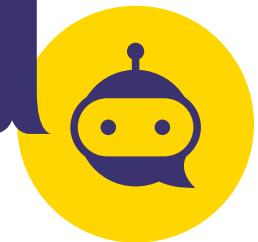
#### ✓ **Invalid data**

Define what constitutes important data for your business. Set quantifiable parameters and only collect data that contribute to your brand's success. Possessing invalid data can not only increase wastage but also lead to inaccurate results, therefore, undesirable outcomes.

Data governance processes are a big must for organizations of all shapes, sizes, and forms. It's a safety net to ensure brands don't go on a wild goose chase but are instead chasing their north star metrics.

### AI Pro-Tip

AI can read input data, detect issues in data quality and suggest or implement corrections. For optimal output, the AI would require access to reference data like valid product names or street addresses. Its capacity to independently track and link to these sources, often with limited human help, eliminates bottlenecks in the data management pipeline. Additionally, AI can refresh the reference sources with new data from feeds.



# Outlined below are the standard regulations a CDP must comply with



## SSO Login

IDP integration. SSO login to govern your password and user management policies



## Data Encryption

TLS protocols with SHA256 algorithms to handle data communications



## Data Access

Role based access control and maker-checker principles available



## Data Hashing

User contact information can be hashed. PII data can be masked



## Audit Log

All actions taken by an admin, across the dashboard are logged for auditing



## Infrastructure Security

Hardened and patched regularly Access is restricted with auditing enabled



## GDPR Compliance

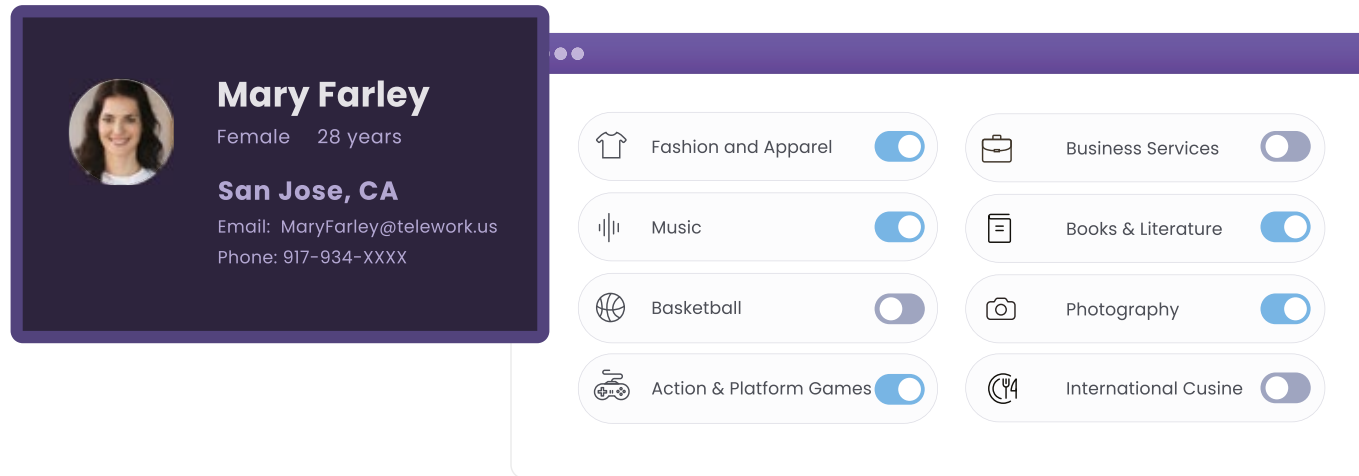
WebEngage is GDPR complaint and takes necessary steps to ensure customer privacy

## ISO

### ISO Certification

WebEngage is ISO 27001:2013 certified ensuring highest data security standards

# Unification



You've successfully collected data of varying formats from fragmented sources using third-party integrations.

Now it's time to unify the aggregated data for creating 360-degree user profiles, user segments, and marketing campaigns.

Before we learn about unification, imagine this scenario.

## Example

You paid your power bill on your banking app. The amount was debited from your account, and the app acknowledges the successful payment. On the due date, you get a text message from the power company which says, “Your electricity bill of ₹5000 is due on Oct 6th. Kindly ignore if paid.” Despite having paid the bill, why do you reckon the power company sent you a reminder?

Because the data from the two sources, i.e., the banking app and the power company, did not synchronize to update the status of the user’s payment profile. When the responsible data sources unify, the user experience elevates. Now that we have a grasp of what unification does, let’s have a look at how unification works.

To create a unified user profile, the profile needs to have a single user ID. Let’s see how that is possible.

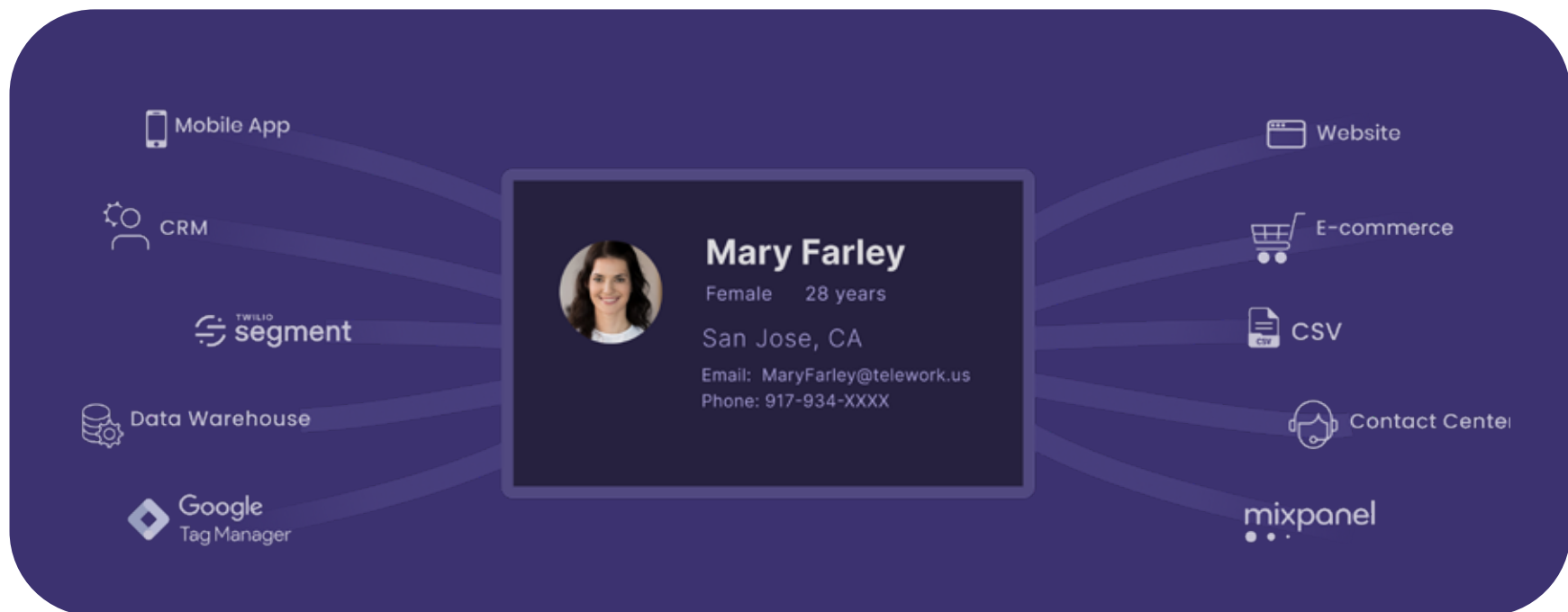
User data unification heavily relies on identity resolution, which involves accurately linking various data points to a single individual and assigning each profile a permanent user ID.

Handling this extensive task manually would be nearly impossible. Just envision the daunting challenge of evaluating thousands of touchpoints, with real-time data continuously

streaming in and needing to be accurately matched to the appropriate user ID. Thankfully, the power of AI and machine learning allows us to automate this process almost entirely.

Bear in mind that in unifying user data, there is a high risk of data duplication, meaning you can end up with excessive copies of the original data without your knowledge. How do you identify duplicates?

By defining some rules for matching identical sets of data.





## CDPs use two types of matching to create permanent, persistent user IDs:

**Deterministic matching** aims to consolidate user records by searching for specific identifiers like email addresses, phone numbers, and usernames. This method offers a high level of confidence that the gathered data points truly correspond to the same customer.

**Probabilistic matching** employs artificial intelligence to make matches based on statistical probabilities that two identities belong to the same user. It utilizes various identifiers such as IP addresses, device types, operating systems, or browser types. While this type of matching is less definitive compared to deterministic matching, it serves as a valuable tool to extend the reach or compensate for limited first-party data.

This process is called data deduplication. After identifying duplicates using these methods, the duplicates are merged into a single customer profile to create a singular user ID. Using permanent user IDs, you can recognize your users as individuals, not just disjointed data points.

### AI Pro-Tip

Data requires constant standardization, like ensuring dates are represented in the same formats. It might also need conversion to formats tailored for specific systems, such as turning relational tables into flat files for analysis. In the past, these changes were guided by manually coded rules, which often faltered in unforeseen situations. AI can perform these conversions through learned patterns instead of fixed rules, reducing effort compared to rule creation and enabling AI to address novel scenarios.



# Segmentation

Segmentation is the process of breaking down your user base or market into small groups to understand them better and create marketing strategies to engage with them and drive conversions.

But it's also a lot more than that.

A CDP is equipped with an interface that enables the marketer to create and manage segments. Basic offerings support rule-based segment creation. Advanced segmentation features may include automated segment discovery, predictive analytics, propensity models, and the ability to import and deploy custom models built in external advanced analytics or data science environments.

CDPs using AI/ML-powered clustering and classification algorithms, can analyze customer data to identify distinct segments based on behavior, preferences, and attributes.

How successful your segmentation strategies are depends on how you chose to create user segments and what they do after. Let's dig deeper into this with the types of segmentation and its use cases:

# Traditional methods of segmentation:

## **Static segments**

Static Lists are the perfect solution for executing one-off campaigns for a small group of users. The term static refers to the fact that once created, the user pool remains stagnant and is not updated to factor in your users' changing preferences, traits, and latest platform/channel interactions.

### **Use Case**

These are ideal for running one-off campaigns where your end goal is to invoke immediate action like user activation, conversion, registration, or convey a personalized message.

## **Dynamic/live segments**

Dynamic/Live Segments are the perfect solution to understanding your users over a long period of time and simultaneously delivering contextually personalized experiences across your platforms and channels. All your user data is tracked in real time for your app and website. This enables dynamic profiling where users roll in and out of a Live Segment as and when their current preferences, status, and actions match or don't match the rules of segmentation specified by you.

### **Use Case**

- Get reachability insights on a user level to engage your segments efficiently.
- Track the growth trends of a segment over time.
- See the list of all known and unknown users that belong within a segment.

# Newer methods of segmentation:

## Predictive segments

Going beyond the traditional segmentation method, predictive segmentation is a technique that allows you to create segments based on the user's propensity for a defined action, such as the likelihood of purchase.

Like creating lookalike audiences, predictive segments leverage machine learning to create a list of users with a 'likeliness to' perform a certain action, such as likely to purchase or churn, and will then create 3 lists – most likely, moderately likely, and least likely – for the selected business goal.

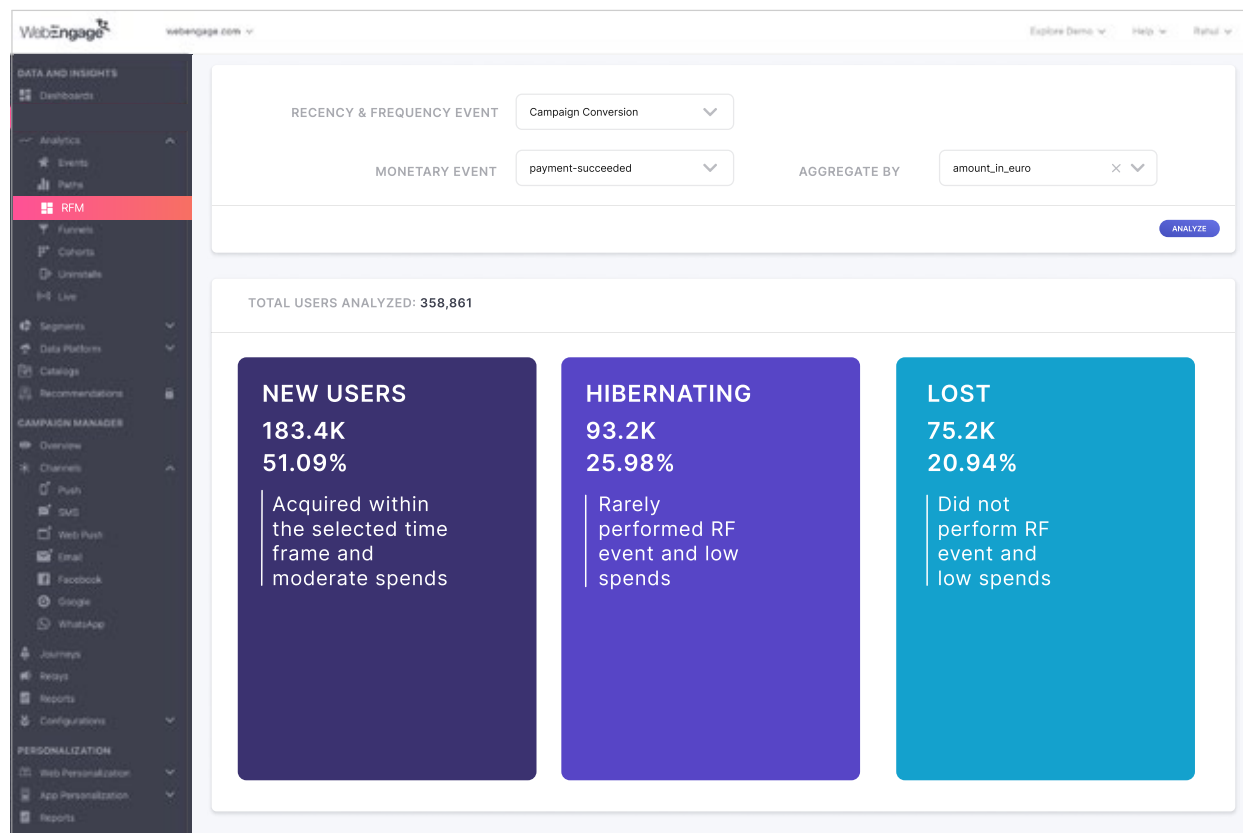
### Use Case

- Customer churn prediction
- User sentiment analysis
- Fraud detection

Segments			
SEGMENT NAME	USERS	CAMPAIGNS	JOURNEYS
Hotel booking - most likely	2.8K	12	2
Hotel booking - moderately likely	8.5K	5	9
Hotel booking - least likely	15.7K	15	5

## RFM

An RFM (Recency, Frequency, and Monetary) Analysis provides one of the most reliable indicators of how long your existing user base will continue transacting with your business. It's a well-loved technique based on a scientific scoring model that groups people as per their transaction history – how recently, how often, and the worth of how much they bought.



## Use Case

Let's say that you have created a segment of users, who've asked to be notified when a product is back in stock, who have an RFM score of above 100, for an E-Commerce site.

Your CDP will constantly track and update the set of users within this segment in real-time, depending on their RFM score.

So, if the RFM score of any of the users included in this segment falls below 100, or if they opt out to be notified, then they will be excluded from the segment and vice versa.

## Object Oriented Customer Segments (OOCs)

A CDP is also capable of processing custom frameworks like this one. The OOCs framework was developed as a solution to address some gaping holes in the traditional segmentation frameworks.

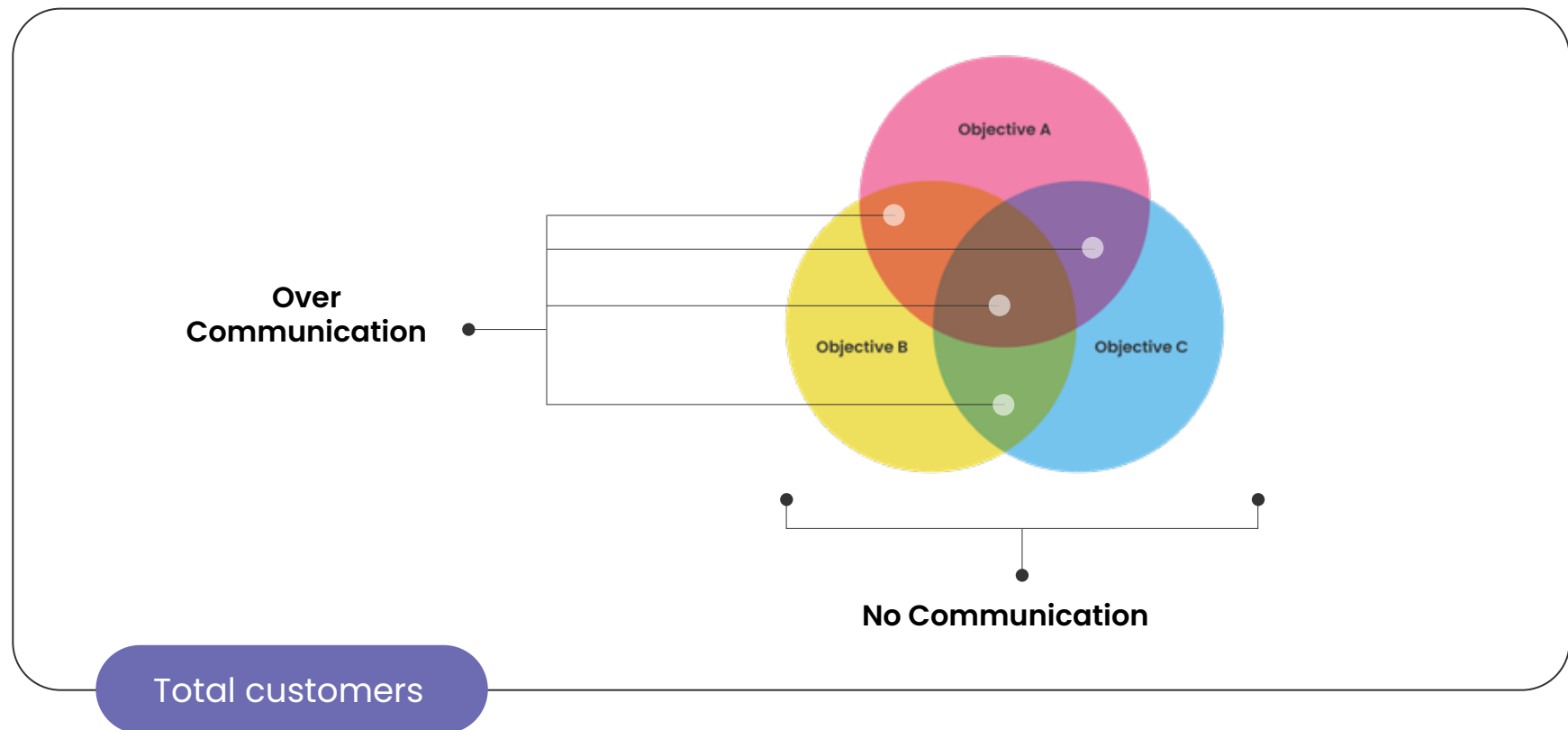
OOCs was created because a majority of the segmentation frameworks are aimed at specific target groups created to achieve your marketing objectives.

However, as you can tell from the Venn Diagram on the next page, the overlapping areas of objectives A, B, and C consist of customers that are being deluged with messages meant for other specific groups.

On the other end of the spectrum, there are customers outside the Venn Diagram who are being neglected and receive no messages whatsoever.

OOCs does away with some of these run-of-the-mill models and introduces newer variables that are industry agnostic, aligned with business objectives, measurable, relevant, actionable, rule-based, and easy to deploy.

OOCs was designed so brands could chase their north-star metrics without any spillage or spam. To learn about this segmentation framework in detail, watch the [masterclass](#).



## **Retargeting**

### **Google Retargeting**

Google Ads allow you to connect with new customers and retarget existing customers to grow your business. By integrating WebEngage with your Google Ad Account, you will be able to target ads to the users who have already visited your website. Campaigns can be one-time or recurring.

### **Facebook Retargeting**

This is a great way to leverage user data and behavioral data to create highly defined audiences for Facebook & Instagram campaigns. Doing so also enables you to create highly targeted look a like audiences that can amplify your visibility to users with matching interests, locations, and gender.

Segment exports can be one-time or recurring.

### **Here are some bonus reads to maximize your segmentation:**

1. [Maximize CTRs in D2C Marketing: 7 Essential Audience Segmentation Techniques](#)
2. [12 Proven Customer Segmentation Techniques to Improve Your Marketing Efforts](#)
3. [Customer Segmentation: 8 Best Ways to Segment Your Customers](#)
4. [Behavioral Segmentation: A Targeted Approach To Modern Marketing](#)
5. [Generational Marketing: Is It The Next Big Marketing Hack?](#)
6. [5 Compelling Use Cases: How Predictive Segmentation Elevates On-Demand Video Platforms](#)



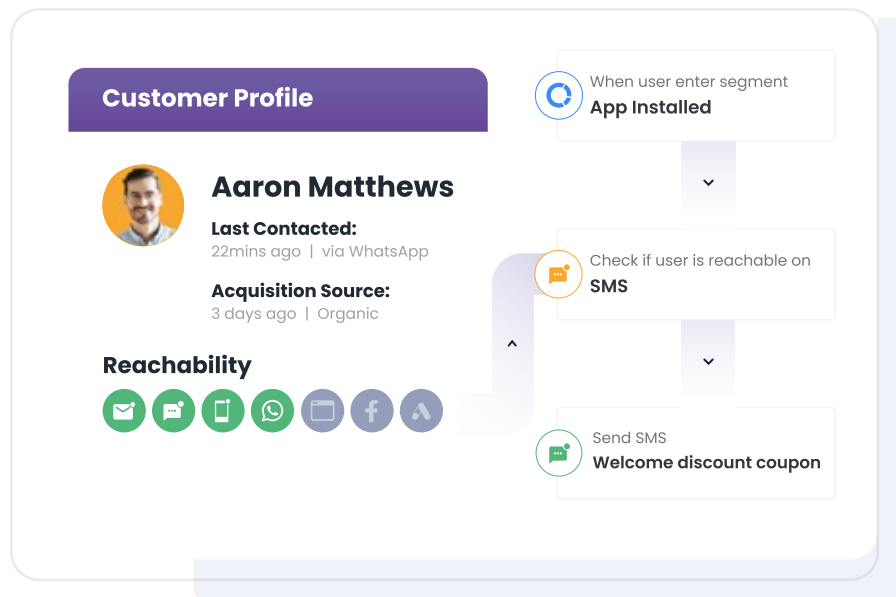


# Activation & Orchestration

Now that we've explored the ins and outs of a fully functional CDP, it's time to talk about activation. A CDP not only enables you to execute multiple use cases across departments but also allows you to orchestrate them. Take a look at ways to activate your data.



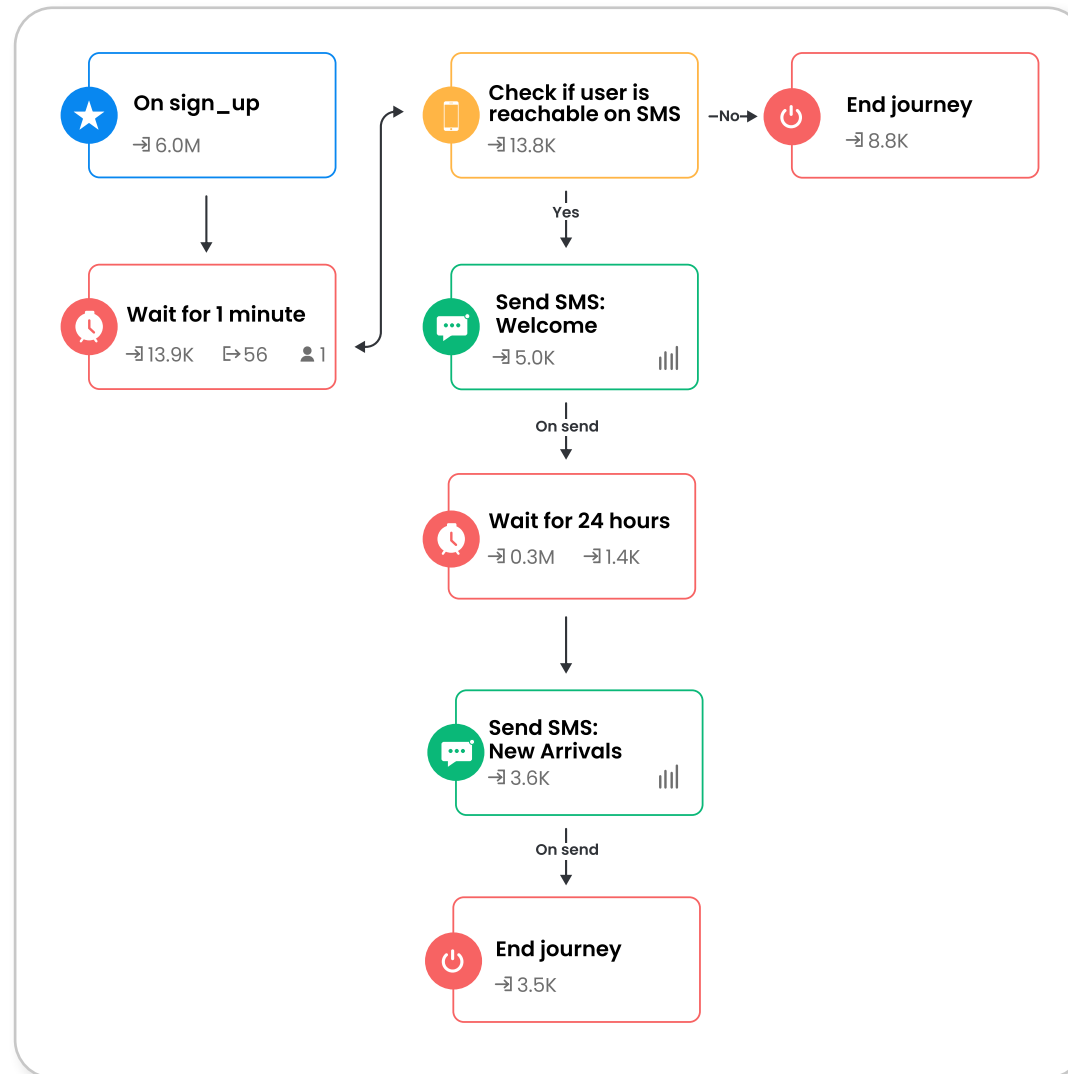
## Campaign Management & Marketing Automation



A CDP ingests data and feeds it to a campaign management tool and a marketing automation platform (sometimes they're the same) for campaign creation and user engagement.

**Let's look at some of the ways  
you can execute and automate  
your campaigns with the help  
of WebEngage's features:**

# 1 Orchestrating User Journeys with the Journey Designer



The journey designer is a drag-n-drop storyboarding interface to program user journeys as well as campaigns across multiple channels and touchpoints. When a CDP integrates with a campaign management platform, the segments become available for targeting users across channels.

AI can analyze CDP data to find opportunities for improvement, such as journeys that are not performing well, segments that haven't received promotions or content that isn't yielding the expected amount of value. This is a particular area of progress in recent years, as AI has gotten better at understanding business goals and presenting information in usable formats such as narrative text.

## AI Pro-Tip 1: Journey Identification

AI can examine CDP data to pinpoint improvement opportunities. These could involve identifying underperforming journeys, segments not exposed to promotions, or content producing less value than anticipated. This domain has seen significant advancements as AI makes strides in comprehending business objectives and delivering information in practical formats, like narrative text.

## AI Pro-Tip 2: Journey Development

AI technology has the capacity to monitor ongoing customer journeys and highlight crucial stages where intervention could have an impact. Moreover, it can utilize these discoveries to create novel journeys with multi-step campaigns and dynamic interaction sequences. These might incorporate protocols that direct customers to distinct stages depending on their actions and profile characteristics. Subsequently, the system can oversee performance and refine the journey structure as time progresses.



## 2 Best Channel & Send-Time Optimization (STO)

Identify the right channel and the right time to engage your audience.

**Take the guesswork out of campaign performance with Send Intelligently and Best Channel**

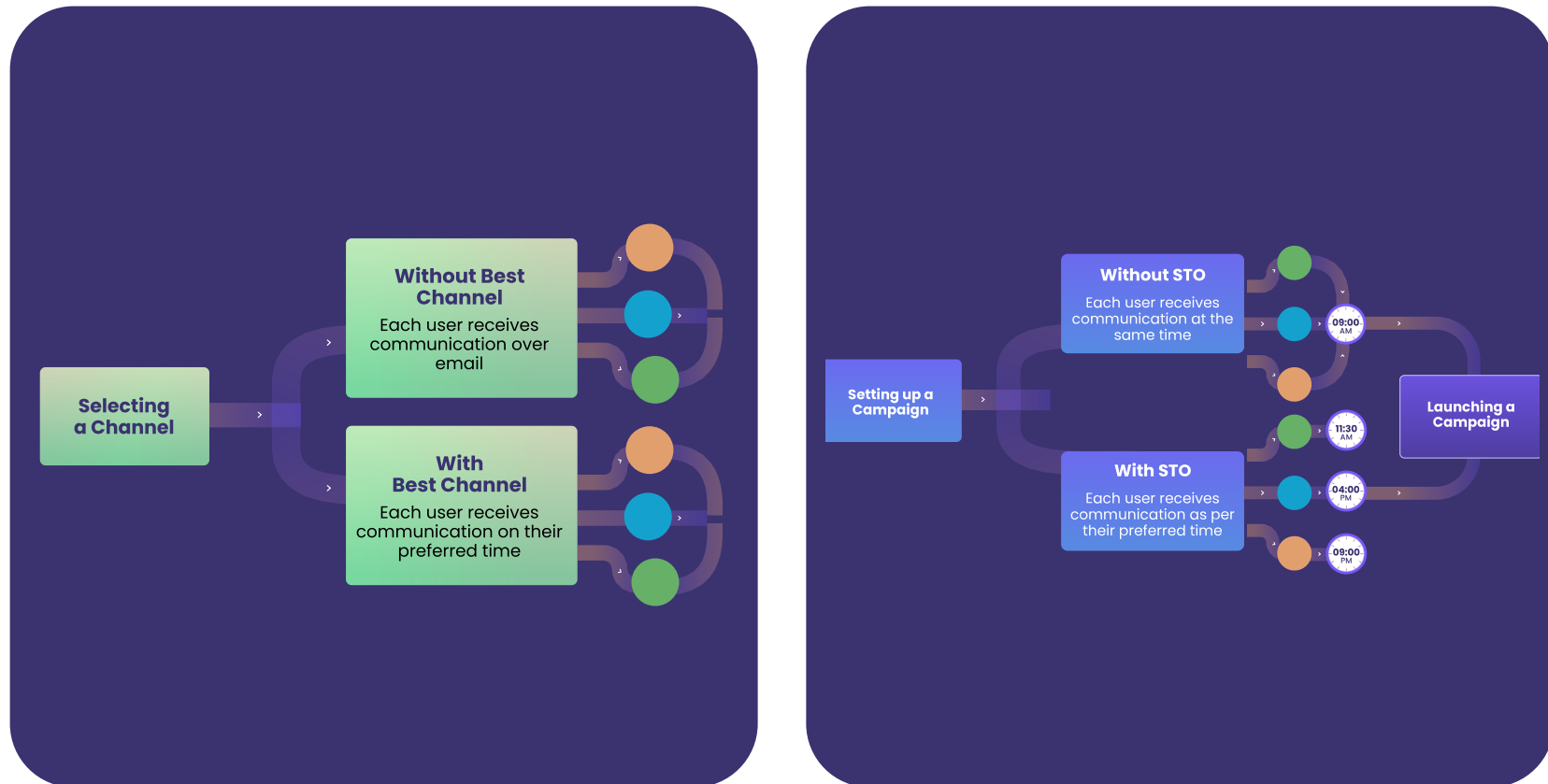
Harness the power of AI and ML to analyze user data and identify patterns that indicate users' activities in the future!

- Reach out to users on channels they prefer with **WebEngage's Best Channel** and drive effective user engagement for marketing campaigns.
- With **Send Intelligently** feature, narrow this approach to a 1:1 level, optimizing campaign send-time for each user.

The diagram shows a central white box with the text "FLASH SALE!!!" and several horizontal lines below it. Four circular icons, each containing a person's profile picture and a timestamp, are connected to the central box by dashed lines. The icons are: a woman at 12:20, a woman at 15:43, a man at 11:10, and a man at 18:30. Each icon is surrounded by various communication channel icons (e.g., smartphone, email, chat bubble, laptop). The background is dark blue with a subtle pattern of small white dots.

WebEngage  
#RETENTIONSIMPLIFIED

# How it works

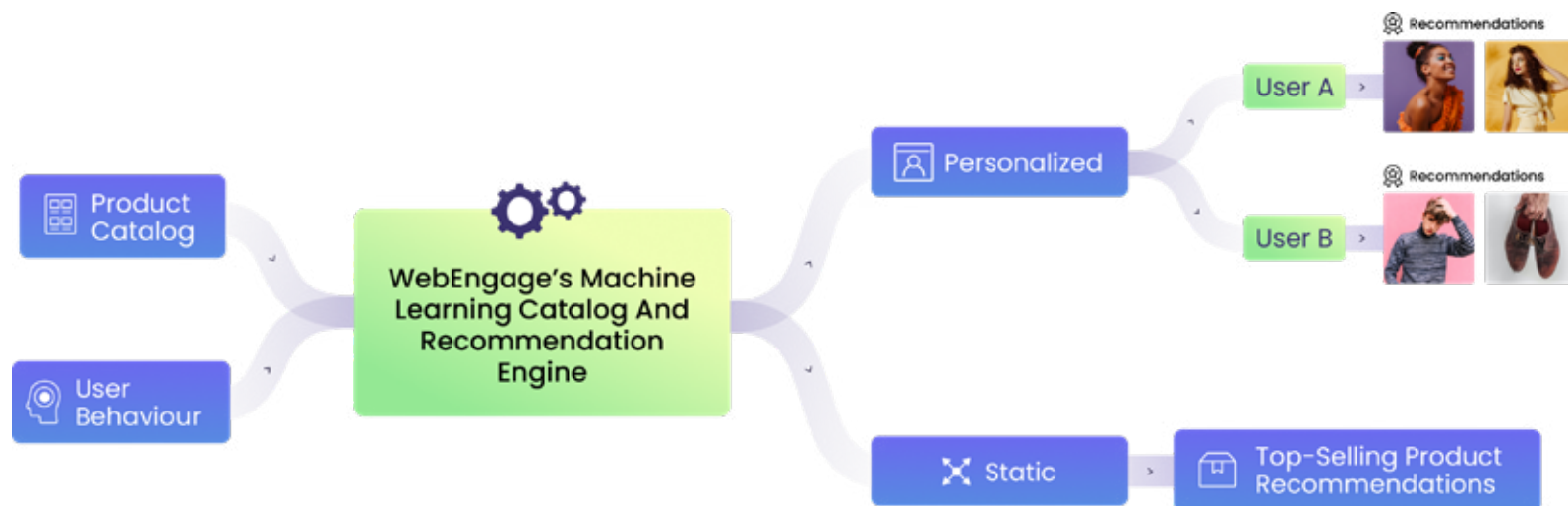


To know the best send-times for industries and geographies around the world, read our [benchmarking report on customer engagement trends](#).

### 3 Catalog and Recommendation Engine

Use Catalogs to keep all your product info in one place and leverage that info to send communications only to the user. An example would be fetching the latest discounted price for a product from a Catalog instead of the old retail price.

Use the recommendation engine to hyper-personalize your messaging with recommendations based on your users' actions. For example, if a user purchases shorts, you can use our recommendation engine to suggest other products that the user might be interested in purchasing.



## 4 Post Activation: Use Custom Alerts to Track Events

What happens after you execute your campaigns? You have to monitor their performance to optimize your strategy. WebEngage's Custom Alerts notifies you when there's something worth knowing.

### Proactive Data Monitoring With Custom Alerts

Custom alert enables you to receive notifications in cases of deviations, positive and negative, for specified events. It acts as a watchdog to help you proactively monitor and take appropriate action ahead of time.



Set up alerts for custom and system events



Get notified hourly, daily, weekly, or monthly



Measure both highs and lows



## TL;DR

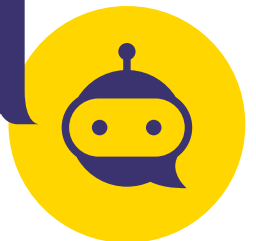
Having a marketing automation platform to complement your CDP can work wonders for your business. You finally have a firm grasp of how to activate your data, but to understand when and where to employ these activation methods, have a look at potential applications across industries.

**In one of our conversations with David Raab, the father of CDP, he revealed that around 75% of CDPs have activation functionality, while 17% only build and share profiles. The remaining 8% build profiles and have analytical capabilities like predictive modeling but no activation. Additionally, there is a trend of industry-specific CDPs for sectors such as finance, hospitality, and telecommunications.**

Most of the platforms in the CDP market will also provide activation and campaign management components, although it is difficult to define the exact criteria for what constitutes a CDP.

### AI Pro-Tip

Executing sophisticated attribution methodologies, such as multi-touch, incremental value estimates, and marketing mix analysis, can be done by AI/ML. This task involves processing massive quantities of data from a combination of internal and external sources and linking marketing communications to customer actions.



# Many Industries, One CDP.

As industries continue to evolve, the need for bigger, better, more advanced use cases arises, not just to outperform competitors but also to deliver hyper-personalized communications to users, enable real-time analytics to get insightful results, and revolutionize the way they engage with customers and drive exceptional results.

# Marketing use cases

Here are a few Marketing use cases made possible by WebEngage's lightweight CDP:



## **Real-Time Fraud Detection and Prevention**

Integrating CDP with fraud detection systems lets BFSI companies codify the intelligence required to improve their fraud detection and prevention capabilities. By leveraging real-time customer data, including transaction history, behavioral patterns, and device information, CDPs can help BFSI customers take important proactive calls on suspicious activities, anomalies, and fraudulent behavior; calls to mitigate threats and protect users' financial assets using real-time alerts, transaction blocking, or step-up authentication.



### **Intelligent Student Pathways with Predictive Learning Analytics**

A CDP, powered by predictive analytics, allows EdTech platforms to create intelligent student pathways. Using machine learning algorithms and advanced data analysis, the CDP can predict student learning outcomes, identify knowledge gaps, and recommend targeted learning resources. The platform can also provide personalized intervention strategies for struggling students, such as additional practice modules or one-on-one tutorials. This advanced use case optimizes student progress, fosters individualized learning, and drives better educational outcomes.



## **E-Commerce & D2C**

### **Hyper-Personalized Product Recommendations with Propensity Scores**

CDPs let e-Commerce and D2C brands implement advanced recommendation systems based on customer propensity scores. By utilizing machine learning algorithms and customer data, the CDP can generate propensity scores to predict individual preferences and purchase intent. This allows brands to deliver hyper-personalized product recommendations, targeted upselling or cross-selling, and tailored promotions, resulting in maximized customer engagement and revenue generation.



# Travel & Hospitality

## **Predictive Upselling and Cross-Selling with Dynamic Pricing**

Travel & hospitality companies can take advantage of the integration between CDPs, dynamic pricing engines and predictive analytics models to upsell and cross-sell. By analyzing customer data like past bookings, preferences, and browsing behavior, the CDP can generate propensity scores to predict potential upgrades or additional services that align with each customer's preferences. This puts businesses in a position to offer personalized and timely upsell or cross-sell recommendations, boosting revenue and enhancing customer experiences.



# Media & Entertainment

## **Dynamic Content Personalization with AI-Driven Segmentation**

A CDP, with AI-driven segmentation, lets media and entertainment companies deliver dynamic and highly personalized content experiences. By studying user behavior, preferences, and engagement patterns through machine learning algorithms, the CDP can personalize real-time content across various channels and platforms. This includes personalized articles, video recommendations, targeted ads, and customized content experiences, leading to increased user satisfaction and engagement.



# Gaming

## Dynamic In-Game Personalization with Real-Time Player Insights

A CDP, with real-time player insights, allows gaming companies to deliver dynamic in-game personalization. By integrating with real-time analytics platforms, the CDP can capture and analyze player data such as gameplay behavior, preferences, and social interactions. It can use the said data to gamify the platform by enticing players with in-game purchases for leveling up. These use cases let gaming companies dynamically personalize game elements like difficulty levels, item drops, quest lines, and in-game events, based on individual player profiles. By adapting the game experience to each player's preferences, engagement and player satisfaction can be significantly enhanced.

# Going beyond marketing use cases

CDP is fantastic for marketing, but its applications encompass other functions too. Let's have a look at some of the non-marketing use cases of a CDP

### Sales teams



Uncover cross-selling and upselling opportunities by analyzing customer data, leading to increased revenue and customer satisfaction.

### Customer Success/ Support teams



Deliver proactive and personalized support by leveraging a comprehensive view of customer data for improved retention and loyalty.

### Product teams



Utilize CDP insights to prioritize product enhancements and tailor marketing messaging to drive adoption and customer satisfaction.

### Analytics teams



Tap into a centralized and enriched CDP dataset for advanced segmentation, predictive modeling, and optimizing marketing strategies.

### Data & IT teams



Exercise data governance and integration to maintain data quality and security across the organization with CDP implementation.

### Business Development teams



Identify new market opportunities and develop targeted outreach strategies by leveraging customer data insights from CDPs.

### HR teams



Enhance employee experience by utilizing CDP data to personalize training, career development, and gamify employee engagement.

### Partnership teams



Leverage customer overlap and shared target audience data from CDPs to identify strategic partnerships and collaborations.

### Finance teams



Optimize pricing models, revenue forecasting, and subscription management by analyzing customer and financial data from CDPs.

# Impact Stories™

**A curated collection of relevant case studies on the impact of CDP on brands.**



How WebEngage revolutionized **customer identity resolution** in just 8 weeks.

## **About**

Kapiva, a prominent brand in the health and wellness industry, has carved a niche for itself by offering high-quality and authentic Ayurvedic products. With a mission to bring the goodness of Ayurveda to modern lifestyles, Kapiva has gained a loyal customer base that values the brand's commitment to natural and holistic well-being.



## **Problem Statement & Challenges:**

Problem Statement: Data silos and incomplete ICP hindering marketing automation efforts. Kapiva faced a significant challenge in implementing marketing automation due to data silos and an incomplete Ideal Customer Profile. The presence of data silos created barriers



fragmented view of their target audience. This lack of comprehensive customer profiles hindered Kapiva's ability to leverage the full potential of marketing automation strategies.

To address this issue, they sought a solution that would unify their customer data and enable the implementation of personalized and targeted marketing campaigns, driving enhanced customer engagement and business growth. The company needed a solution to consolidate its data and provide a holistic view of its customers.

### **Their primary challenges in succeeding were as follows:**

- ✔ Giving their dashboards and user journeys a fresh start by having holistic user data profiles without duplication or errors.
- ✔ Not losing data during migration since there is constant activity happening on both dashboards.
- ✔ Not losing a single day of activity due to migration since campaigns were to continue, and events were to be tracked simultaneously while the migration happened simultaneously.

### **? How It Was Done:**

To address Kapiva's challenges, WebEngage took a systematic approach to resolve customer identity issues by migrating fresh, clean data to another dashboard without losing out on any data or continuous customer engagement.

Throughout the migration process, WebEngage's dedicated Customer Success Manager (CSM) played a pivotal role. They meticulously prepared strategic plans, defined timeframes, and vetted every step to mitigate the risk of repeating any erroneous actions.

**The CSM team ensured that there was no data loss during the migration process, guaranteeing a seamless transition for Kapiva.**

Learn more about how exactly [Kapiva managed to consolidate its data seamlessly](#).

### AI Pro-Tip

Identity resolution involves comparing personal identifiers to establish connections between them and ensure they refer to the same user. This task of data deduplication, more intricate than data transformations, has historically relied on rule-based approaches. AI can be educated to supplant these with adaptable and frequently more precise alternatives.



# Shaw Academy boosts its revenue by 25%

Shaw Academy has been able to drive significant results by having a unified view of every student and sending timely, hyper-personalized communication based on the student's preferences.

"WebEngage has been crucial in revolutionizing our entire online user experience. The platform has helped us deliver a highly-personalized experience to our students consistently. The Customer Support and Customer Success teams at WebEngage are supportive like no other teams I have encountered."



**Scott Newton**  
CCO, Shaw Academy



## Use case

Contextually engaging with students at scale, with action-based, timely, and hyper-personalized communication.

## Results:

**100%** Increase In Lesson Attendance  
Through All Channels Combined

**10%** Increase In Lesson Attendance  
Through WhatsApp Campaigns

[Read Shaw Academy's complete Impact Story on our website.](#)

# Farmer's Fresh Zone saw a 40% increase in purchase orders within 6 months

WebEngage's Customer Data Platform and Retention Operating System aided Farmers Fresh Zone to create multiple journeys and campaigns to achieve these goals.

"WebEngage has played a crucial role in our business growth – especially app reinstalls & cart abandonment journeys. Its full-stack automation program is helping us deliver contextual communication & experiences to our consumers – which leads to a constant increase in the number of orders & revenue. With accurate user data & automated communication, we can engage our users in real-time."



**Pradeep PS**

Founder & CEO,  
Farmers Fresh Zone



INDUSTRY  
**Foodtech**

## Use case

- ✓ Increasing conversions and tracking app
- ✓ Tracking users across the funnel, from installing the app to placing the order

## Results:

**40%** Increase in Purchase Orders

**25%** Increase In Revenue

**7%** Rise In The App Reinstallation Rate

**17%** Recovery In Abandoned Carts

[Read Farmer's Fresh Zone complete Impact Story on our website.](#)

# ABP Weddings increased its revenue by 20%

ABP Weddings adopted WebEngage for real-time targeting, CDP, running automated omnichannel engagements and journeys to reactivate users.

“The brand was in search of a retention operating system that would not only help them with real-time targeting but also facilitate a host of activities like analyzing customer data using CDP, running omnichannel engagement, and reactivating users all under one platform.”



**Arindam Baral**

Head - Product & Technology,  
ABP Weddings



INDUSTRY

**Miscellaneous**

## Use case

Omnichannel user campaigns for engagement and reactivation

## Results:

**20%** Boost In Revenue Within 6 Months

**1.5x** Increase In Profile Validation & Photo Uploads

**1.3x** Boost In Reactivation of Dormant Users

**1.2x** Rise In Interested Profiles by the Prospects

[Read ABP Weddings' complete Impact Story on our website.](#)

# BharatAgri sees a 2X boost in Daily Active Users

The team at BharatAgri adopted the WebEngage Retention Operating System to offer personalized agricultural advisory services to farmers at scale.

“WebEngage’s CDP helps BharatAgri get a unified view of each farmer, including the touchpoints and the actions (events) that a farmer has performed on the BharatAgri app. This also helps in instantly identifying the farmers’ preferred channels of engagement and delivering contextual communication.”



**Siddharth Dialani**

Co-founder



## Use case

Contextual farmer engagement at scale

## Results:

**19.89%** conversions through campaigns sent in Marathi

**15.56%** conversions through campaigns sent in Hindi

**2X** increase in Daily Active Users (DAUs)

**10X** MoM increase in revenue

[Read BharatAgri's complete Impact Story on our website.](#)

# Best Practices

To avoid jumping the gun, take note of a few key considerations before deploying a CDP. Be crystal clear about what you want from a CDP, how to get it, and what to expect as you get it. Knowing when to not opt for a CDP is as important as knowing when to opt for one.

# Key questions to ask before choosing a CDP

1

## **Do I have ample individual-level data?**

If the answer is no, the cost of acquiring more first-party data would weaken the business case for a CDP. A neighboring solution based on aggregate data may be preferable, so build use cases to aid in vendor selection.

2

## **Is the CDP the ideal solution to solve my problem?**

Not all marketers need a CDP. In fact, at least 10 technology categories have features that overlap with those of a CDP. Many advertisers assume CDPs will replace a digital advertising Data Management Platform supporting paid media use cases, which is a risky assumption worthy of scrutiny.

3

## **What are the business outcomes and success metrics?**

Be sure you have identified the size of the opportunity for the value created by the delivery of use cases facilitated by the proposed CDP solution. Ensure your business case has a clear plan for measuring success.

4

## **How will we govern and protect customer data?**

Many CDPs have native support for consent and preference management. Assess the requirements for privacy compliance and data governance that apply to your enterprise and how the CDP will support these initiatives.



## 5 Who will own and manage our CDP?

Consider who will manage the CDP and how this will change the workflow and processes of your team. For IT-managed CDP options, consider a CDP engine/toolkit or a data integration CDP. For marketer-managed options, a smart hub or marketing cloud CDP may help overcome individual channel silos. Plan for inclusive training and evangelism to rally marketing teams around a CDP so that the business can get value from it.

## 6 How can you align to your integrated suite or best-of-breed martech strategy?

Consider who will manage the CDP and how this will change the workflow and processes of your team. For IT-managed CDP options, consider a CDP engine/toolkit or a data integration CDP. For marketer-managed options, a smart hub or marketing cloud CDP may help overcome individual channel silos. Plan for inclusive training and evangelism to rally marketing teams around a CDP so that the business can get value from it.

## 7 What data will go into our CDP?

Can you get access to essential data like marketing response history or previous purchases to really make customer modeling worthwhile? Are there teams beyond marketing that will want access to the unified customer profile that the CDP creates?

### Parting thought:

While cost is important, it should not be the sole determining factor when choosing a tool, as the most expensive tool may not necessarily be the most effective.

# How to choose the right CDP?

There are a few ground rules to bear in mind before you settle on a CDP. There are several CDPs in the market with varying features. Choosing one can feel as overwhelming as picking what to eat at a new restaurant except you can end up with more than just a bad stomach if you make the wrong decision.

The right CDP can boost the effectiveness of your marketing campaigns, sales outreach, customer service, and data operations. CDPs also aid IT and data teams in establishing data governance and compliance with consent management for Personal Identifiable Information (PII).

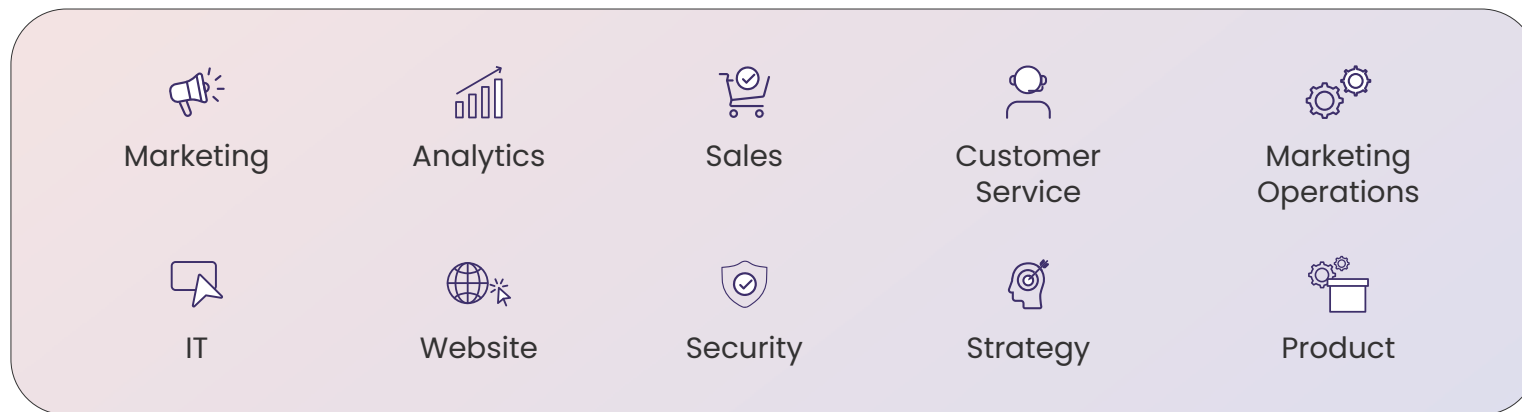
Choosing the right CDP lays the groundwork for your organization's customer data landscape, impacting both short-term and long-term ROI. Avoid rushing into the decision and selecting an unsuitable or non-scalable CDP to mitigate complex technology replacements. Take the time to assess vendors' industry experience and ensure their platform can deliver real business value now and in the future.

A CDP is part of your MarTech stack, so you want to future-proof your investment by making sure you ask the right questions about vendor capabilities during the vetting process. Doing your due diligence upfront will ensure you maximize the value of your organization's CDP investment over time.

## Here's what you need to know before selecting a CDP.

### Set up a team of CDP stakeholders

Having the right people at the table is critical, so you will need a cross-functional team with an airtight strategy. **Involve teams that oversee data collection in your organization like**



Consider involving a **legal representative** in the planning process for heavily regulated industries like financial services, life sciences, and healthcare to address potential legal issues.

Identify and include **internal champions** to work with the CDP vendor, providing industry expertise and guiding CDP adoption post-implementation.

If required, hire **external consultants**, such as MarTech experts or services agencies, to complement internal skills and support the digital transformation process based on your staffing and resource needs.

## **Know your company's digital maturity**

Digital maturity is a company's capacity to leverage technology trends for a competitive advantage. When charting a digital transformation roadmap, assessing the current digital maturity level helps determine the way forward.

Digital maturity encompasses factors like company size, age, existing legacy technology, processes, and internal resources to adopt and optimize new technologies effectively.

In this process, defining the appropriate CDP use cases is crucial to achieve quick wins and long-term value during the journey.

## **Create your CDP use case roadmap**

Identify your primary CDP use cases and align them with stakeholders' needs. Ensuring value delivery across the organization will ease compliance efforts. Start with a few simple use cases to avoid overwhelm. Determine if you seek personalized customer experiences for increased loyalty or prioritize data privacy management.

Explore market and customer-centric use cases to target new markets, pilot products, and enrich customer experiences. Emphasizing growth opportunities facilitates business model evolution and moves away from legacy practices, paving the way for future investments in quality improvements, automation, and operational benefits.

## **Gather CDP RFP requirements**

By defining your key CDP use cases and assessing your company's data maturity, you can create an informed CDP roadmap that guides your vendor selection process.

The Chief Information Officer (CIO) or the Chief Data Officer (CDO) ought to lead the review, considering business opportunities, integration needs, compliance, and technology capabilities of CDP vendors. The CIO evaluates scalability, security, and flexibility, identifying self-service possibilities and aligning solutions with data governance policies. While focusing on immediate use cases, also ensure the selected vendor can adapt to your future needs with flexibility and scalability. To learn more about evaluating your CDP vendors, read this [CDP RFP Guide](#).

## Prepare evaluation framework

Starting with use cases and requirements is key, but it may not reveal the intangible qualities a vendor offers. Look into the CDP vendor's client base, execution track record, and history. Consider involving consultants or industry analysts to assess your goals and recommend suitable vendors.

During CDP demos, ensure a well-defined framework is in place to maximize the value of the meetings. Request vendors to address your key use cases and challenges your organization may encounter. Evaluate how the vendor approaches problem-solving and if their strategies align with your needs.

### Pro Tips:

- ✓ Building a vendor evaluation matrix goes a long way.
- ✓ Collect RFP responses before scheduling demos. This allows you to eliminate unqualified vendors early, streamlining the demo process for greater efficiency.

## Have a process for collecting stakeholder feedback

During the evaluation process, prioritize communication and collaboration. Keep the feedback mechanism front and center. Conduct follow-up meetings to gather feedback from key stakeholders and maintain well-organized notes to facilitate effective vendor follow-ups. Consider creating a scorecard for your team to rate vendors against your scoring criteria, simplifying the evaluation process.

Our friends at the [CDP institute](https://www.cdpinstitute.com) have a repository of resources that hold answers to any questions on CDP. We recommend visiting their website for a more microscopic view.

# Our users love us!

## MARKETERS

Around the World ❤️ Us



# #1

in Usability Index for  
Marketing Automation.

Source: G2 Report

# #1

in the Marketing Automation  
category in India

Source: G2 Best India Sellers

# Closing Thoughts

CDP's industry revenue is estimated to hit \$2.3 billion in 2023. The cookieless revolution is underway, and you have a chance to reign supreme in a world that runs on data. A CDP to orchestrate the flow of information, knowledge, and wisdom will prove to be a game changer in such a fertile market.

This all-in-one guide was prepared to equip you with everything you would need to consider implementing a customer data platform.

Regardless of your organization size, shape, or form, CDP's holistic nature makes it an ideal solution to champion issues around:

- Data integration and management
- Unified customer profiles
- Identify high-value segments
- Safeguards data privacy
- Hyper-personalized campaigns
- AI/ML-powered analytics
- Marketing automation
- Campaign Management
- Identity resolution

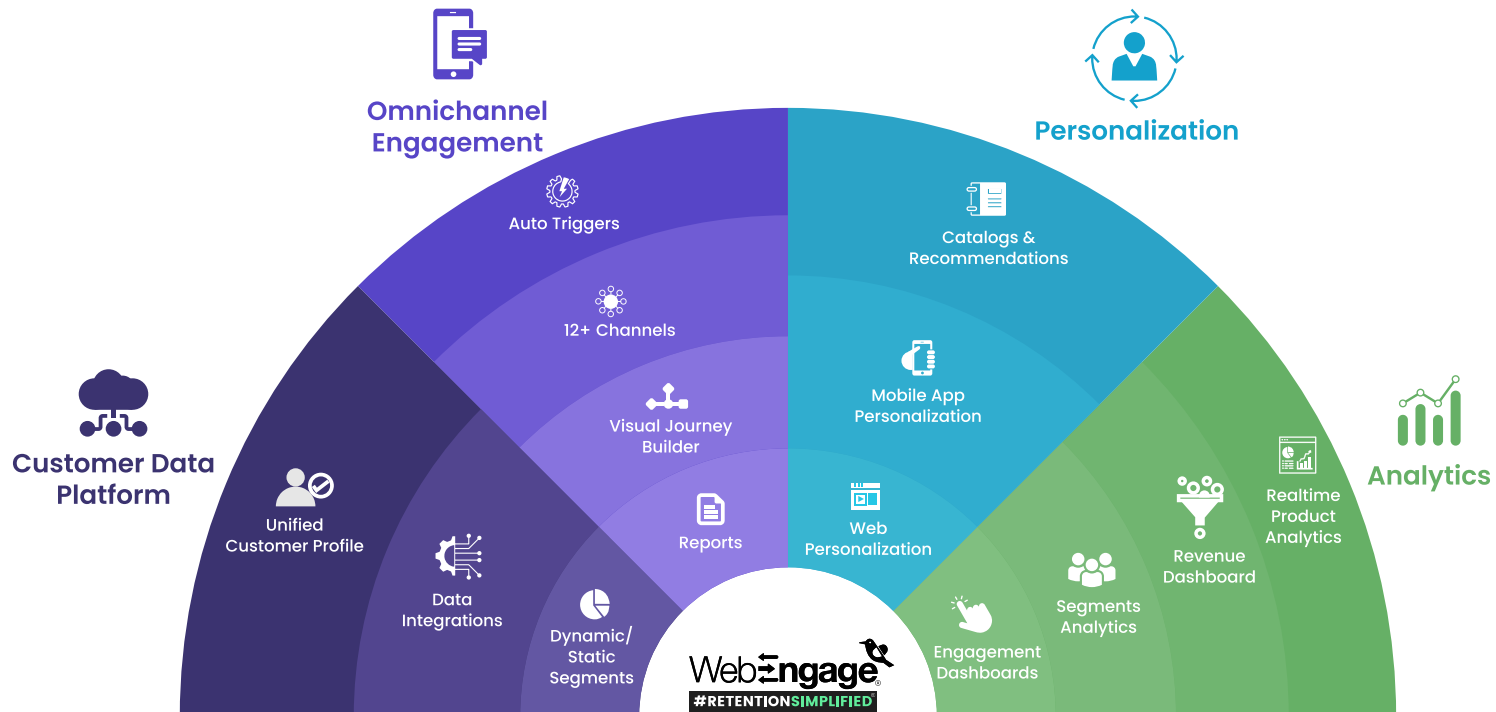
WebEngage's lightweight CDP along with its marketing automation and campaign management suite addresses each of the above concerns with an easy-to-use dashboard. It allows for the creation of a robust data culture within your organization; one that isn't bogged down by siloes and prevents data from falling through the cracks. Its best-in-class engines paint a 360-degree picture of your customers without compromising on data privacy and compliance laws.

Don't be in the dark anymore. See the light. See with CDP. [Book a demo](#) now.



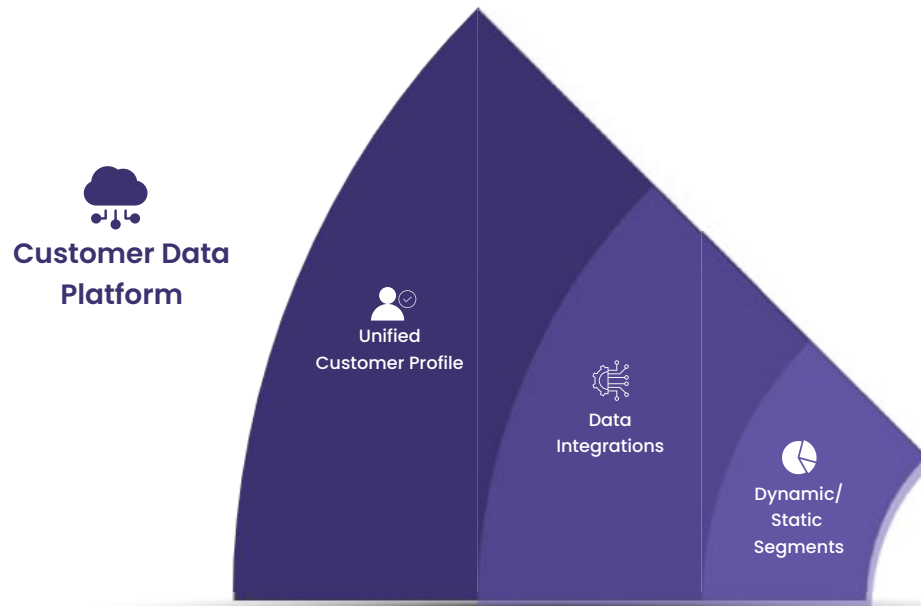
# Introducing WebEngage

The most powerful self-serve marketing automation suite to help you convert, engage, and retain more users.



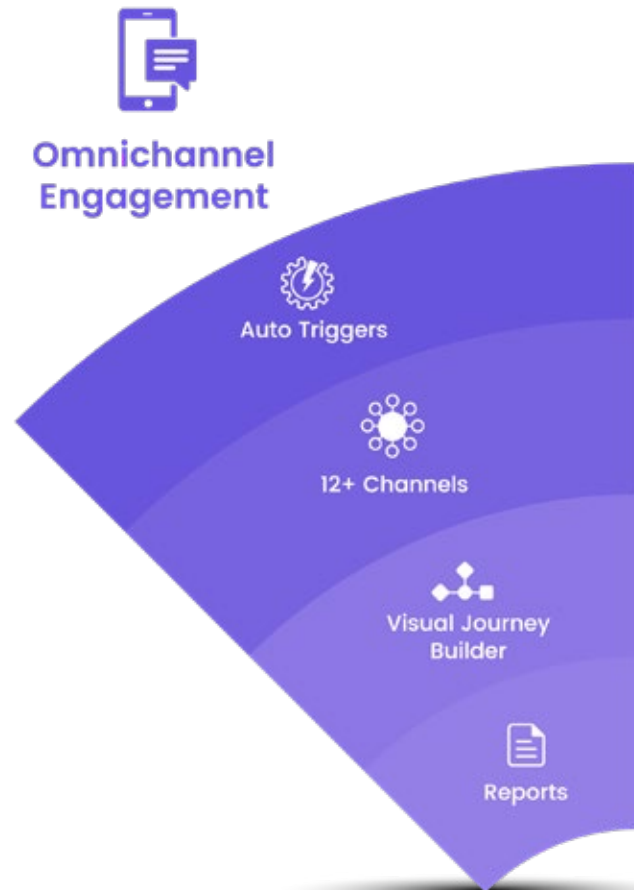
# Unified data, and its advantages

The most powerful self-serve marketing automation suite to help you convert, engage, and retain more users.



- Dynamic segments using real-time personal and behavioural customer data
- Customer Data Systems to kill Data Silos

# Omnichannel Engagement



## Communication Channels:

### Visual Journey Builder


 Journeys

 Relays

### Other Configs

 DND


 Throttling

 Frequency capping  
Schedule reports

### Auto Triggers


 Occurrence of Event

 Enter/Exit/Is In Segment

 Change in User Attribute

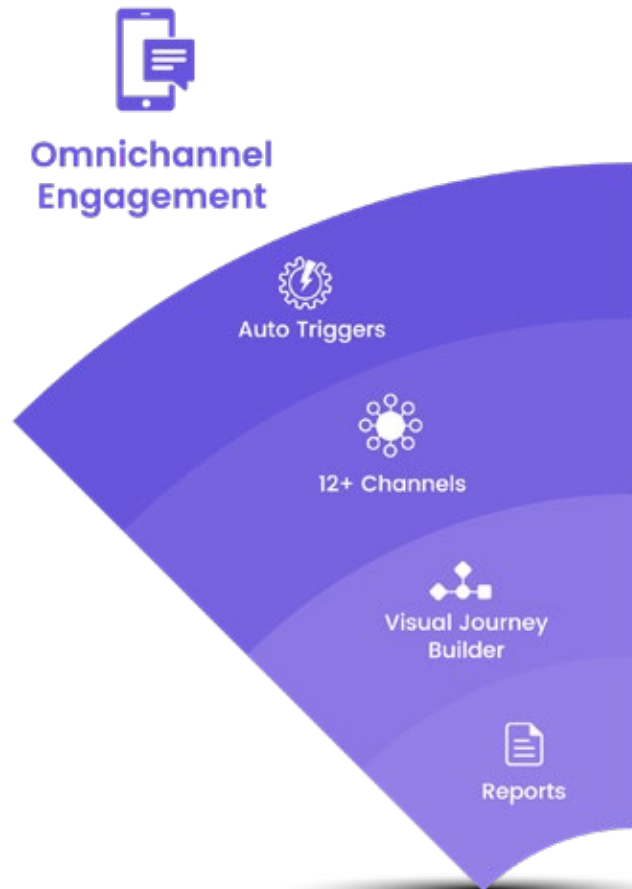
 CSV For Specific Users

 Enter/Exit/Geo-fence

 Occurrence of Business Events

WebEngage Journeys help track each customer behaviour and trigger messages on the preferred channel, at the right time.

# ... Across 12+ Communication Channels



## Communication Channels

### Mobile

- Mobile Web Push
- Whatsapp
- SMS
- Mobile Push
- In App Overlays
- In App in-line Personalization

### Web

- Browser Push
- Web Overlays
- Web in-line Personalization

### Email

- Email

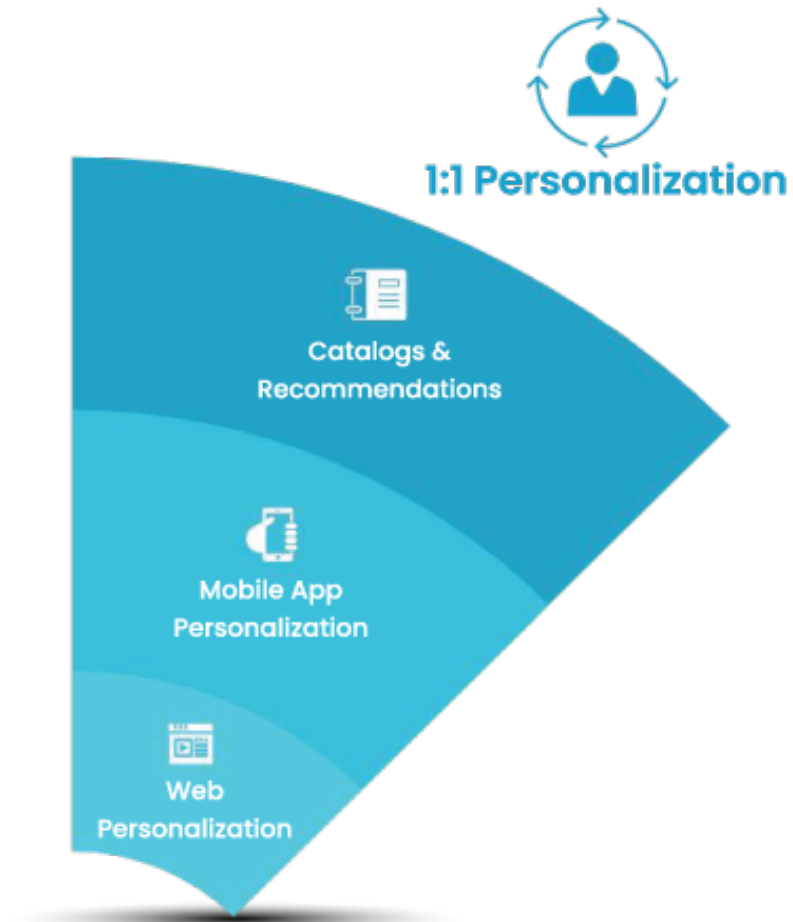
### Digital Ads Platform

- Google Custom Audience
- Facebook Custom Audience

12+ communications channels that help you engage your users for better conversions and in turn, retention

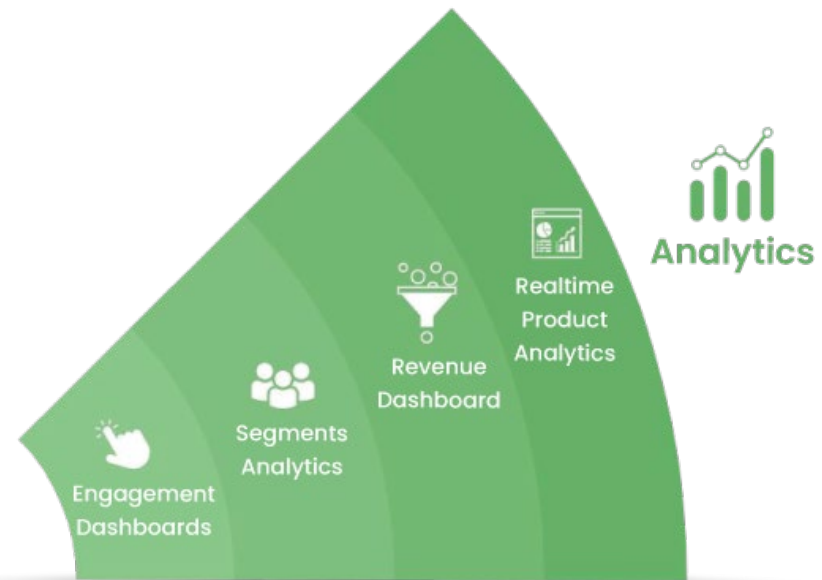
# 1:1 Personalization at Scale

- Deliver contextual, relevant and personalized experiences for better conversions
- No-code personalization
- CMS agnostic, works with: Shopify, Magento, Wordpress, or your own stack
- Works for Web, iOS and Android Apps

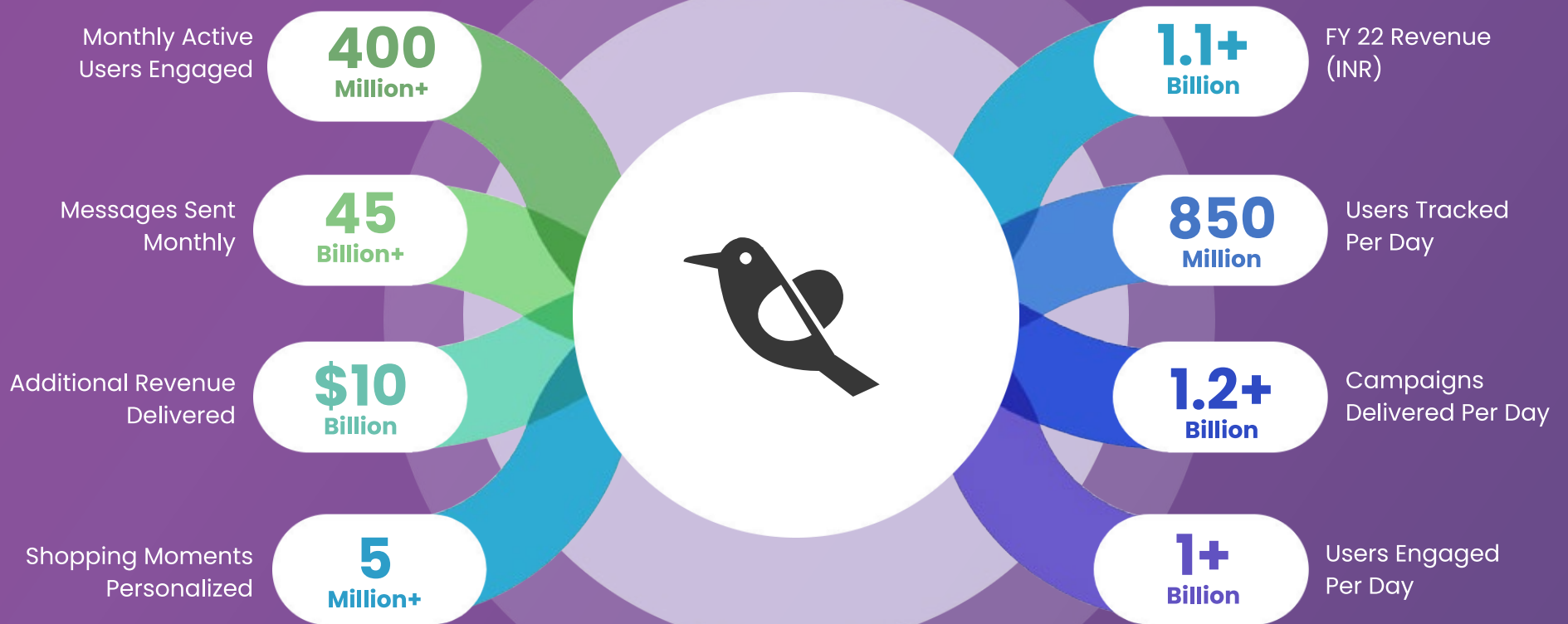


# Deep Insights on Customers, Events and Engagement

- Realtime Product Analytics- Cohesive view of customer activities across your Web & App properties
- Revenue Dashboard- Complete attribution of Conversions and Bottom-line contribution
- Segments Analytics- Segment Performance across campaigns
- Engagement Dashboards- Channels and Journeys effectiveness across campaigns



# WebEngage In Numbers



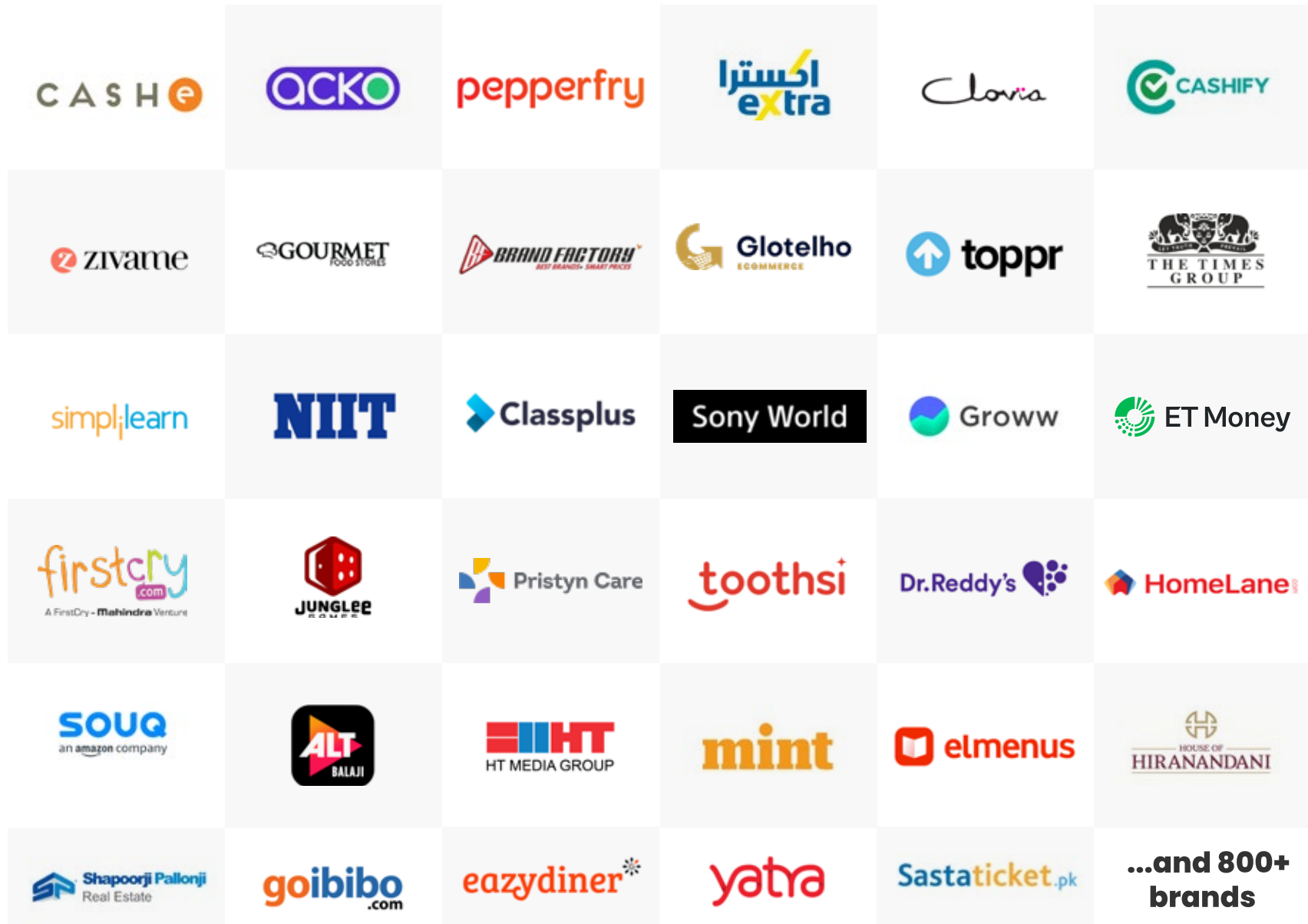
#RetentionSimplified

# Simplifying Customer Retention At Scale

1.4 Billion Messages  
Sent Everyday







# We're More Than Just Your Business Partners

## Edtech

With WebEngage, we saw a significant uplift in open rates, click through rates, and overall conversions, directly translating into more revenue.

### Narendra Agrawal

Co-Founder  
Testbook



## BFSI

WebEngage's retargeting campaigns are very effective, resulting in 17% of our transactions. We witness a higher ROI than other digital channels.

### Shaunaq Marathe

Manager - Campaign Strategy  
& Analytics  
Bajaj Finserv



## Travel & Hospitality

The WebEngage Customer Success team has worked tirelessly to solve our problems. We have enjoyed this kind of close collaboration with WebEngage.

### Vikalp Sahni

Co-Founder and CTO  
Goibibo



## D2C

By choosing WebEngage as our growth partner, we've adopted a retention-first approach that shall help us scale our business faster than before. The kind of support we get from WebEngage is unmatched.

### **Dhruv Madhok**

Co-Founder  
Arata



## E-Commerce

By using WebEngage, we've been able to reduce manual intervention in campaign execution, save costs and achieve 359% uplift in our overall revenue via the WebEngage campaigns.

### **Amit Sethi**

Co-founder & CTO  
Cashify



## Media & Entertainment

Real-time messages via WebEngage have proven to increase key KPIs to as high as 75%. Hand holding the user has resulted in retained customers

### **Manav Sethi**

Chief Marketing Officer  
ALTBalaji



## Contributors



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Founder, CDP Institute

## About WebEngage

WebEngage is a full-stack customer engagement and retention platform that helps consumer businesses increase their customer lifetime value. Get a unified view of your customers with a robust customer data platform, engage them across 12+ channels with automation workflows, and hyper-personalize their experiences with a state-of-the-art personalization engine, all backed by a solid analytics framework.

With a mission to humanize the world's website & apps, we now power over 1.4 Billion messages sent everyday for our customers across 50+ countries, and 20+ industries.

**Have questions? Want to know more?**



**Request a Demo**



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