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Learn More Free (up to 1,000 monthly visitors); \$120 per month (up to 10,000 monthly visitors) Yes, including predictive recommendations Yes, via a number of channels and triggers Not disclosed, must contact for pricing Yes, including predictive recommendations Yes including omnichannel customer journeys Yes, Marketing Automation \$2,988 (with annual contract) Yes, single 360 customer view A customer data from various channels and sources, such as CRM systems, marketing automations tools, e-commerce platforms, social media and email channels, websites and more. The platform collects data from these sources and creates a unified customer profile that can be accessed and used to analyze customer behavior, sales and customer data include, behavioral, demographic and transactional. This data is collected and used to analyze customer behavior, helping to gain insights on what the customer is doing and what the customer needs, allowing for a more personalized and targeted experience. Customer data and need a centralized platform to manage it effectively. There are several benefits that businesses can gain from using a customer data platform (CDP), including the following: Centralized customer data: A CDP allows businesses to consolidate customer data from various sources into a single, unified view. This makes it easier for businesses to understand their customers and deliver a more personalized experience. Solid CDPs have the ability to easily integrate with your existing data and work seamlessly with other systems you already use. Improved customer insights: A CDP provides businesses with a deeper understanding of their customers by analyzing their behavior, preferences and demographics. This information can be used to create targeted marketing campaigns and improve customer engagement. Some CDPs have advanced built-in AI capabilities allowing for more predictive recommendations and intelligent insights. Better customers based on various criteria, such as purchase history, behavior and demographics. This allows businesses to deliver more relevant messages and personalized offers to their customers. Streamlined marketing operations: A CDP can automate many marketing tasks, such as data cleansing, segmentation and campaign management. This can save businesses time, money and resources, allowing them to focus on other aspects of their operations. Improved return on investment (ROI) By delivering more targeted and personalized marketing campaigns, businesses can increase their ROI and revenue growth by tracking real-time insights and advanced analytics. Using a CDP can enhance your marketing agility by identifying opportunities based on preferences, location and other relevant factors. Secure customer data: By ensuring sensitive data is kept secure, you can establish customer confidence and trust by adhering to current and future privacy regulations and industry benchmarks, such as General Data Protection Regulation (GDPR), Health Insurance Portability and Accountability Act (HIPAA) and FedRAMP Overall, a customer data platform can greatly help businesses to gain a better understanding of their customers, improve customer engagement and drive revenue growth. Choosing the best customer data platform for your business can feel like an overwhelming task, especially with an array of options on the market. Here are some guidelines to help you make the right choice. Determine Your Budget Many CDPs do not list prices publicly. You must visit their website and follow their instructions to request a custom quote. As you do, remember that not all features are included in the core plans. Some are only available as add-ons. So, make a prioritized list of the features and tools you need and be sure to ask what add-ons are available to complete your list and their added cost. Determine What Tools and Integrate a unique list of tools and platforms, this means that some of the platforms, data sources and tools you need to integrate with your CDP and be sure to give that list to the CDP provider to ensure your integration needs will be met. Map Out Business goals with your customer data. They will then ensure that those goals can be met with the software they offer you. To prepare, preliminarily bring together all of your key stakeholders who are likely to use your CDP and make a list of their goals, then prioritize them from critical to nice-to-have. Also consider best practices, such as how your data should be protected by your chosen CDP. Formalize Your Selection Once you have a few CDP providers that align with your business needs, it's time to formalize your selection. Look for customer reviews to help narrow down the best provider for you. Then, to confirm your decision, reach out and schedule a meeting to start a conversation between your chosen CDP provider and your key stakeholders. Essential CDP Features Here are some essential features to consider when choosing a good CDP platform: Data integration: A good CDP platform: Data integrate with various data sources such as CRM, social media, email marketing platforms and other third-party systems. This feature allows you to consolidate customer data from different sources and create a unified customer profile. Data cleansing and unification: A CDP should have features that help clean and unify customer data. This feature ensures that the data you collect is accurate, complete and consistent. Segmentation and personalization: Look for a CDP that provides segmentation and personalization: A consistent. marketing campaigns based on customer behavior, preferences and demographics. These strategies also help to re-engage clients and hold on to top-paying customers. Real-time data processing: A good CDP should be able to process data in real time. This feature allows you to respond to customer behavior quickly and provide a personalized experience. An AI-infused CDP platform will also use predictive analysis to make future predictions. Analytics and reporting: Look for a CDP that provides analytics and reporting: Look for a CDP that provides analytics and reporting capabilities. Choose a CDP that supports multiple channels such as email, social media, mobile and web. This feature allows you to create a seamless customer experience across different channels. Security and compliance: A good CDP should have up-to-date security and compliance features to protect customer data and comply with data privacy regulations such as GDPR and California Consumer Privacy Act (CCPA). Integrations A well-designed CDP platform should seamlessly integrate with a company's larger tech stack, making it an ideal choice for businesses that want to incorporate top-notch solutions into their data management platform. This allows for easy swapping of apps as needed. Let's take a look at some of the most important integrations when it comes to data platform. Prebuilt integrations: Out-of-the-box integrations will handle the bulk of the work when it comes to data integrations and delivery. Before choosing a CDP, check the prebuilt integration should cover most of the apps in your data stack. Integration capabilities: Consider the vendor's integration capabilities when selecting a CDP. Look for a vendor that offers an extensive, full range of integration categories including web, mobile and IoT as well as destination categories such as analytics, advertising and storage. In-house integration experts: Look for a CDP platform that not only has a strong set of out-of-the-box integration set of out-of-the-box integration set of support. These integrations but a quality integration set of support. These integrations but a quality integration set of support. CDPs will limit you to the applications and systems provided by the vendor. Opting for an ecosystem-neutral CDP enables you to use industry-leading solutions for each job. Product documentation: Check for the vendor's prebuilt integration documentation. How easy and user-friendly are the integrations? How long will it take to achieve each integration? Are there any product limitations based on the plans? These are some important questions to ask when considering a CDP platform. Other Important considering a CDP platform. Other Important to recognize that although a customer data platform has its advantages, it also requires a long-term commitment as it becomes deeply integrated into your digital ecosystem. It's crucial that customers, especially those with limited knowledge or technical expertise, understand what they are committing to and how to derive value from it. Let's take a look at some important questions stakeholders should ask vendors before signing on: Vendor stability: Has the product been a good partner in doing business and can it evolve with the challenges and needs of the clients? It's important to choose a vendor that is built to grow and meet your industry-specific needs. Flexibility: Does it have an array of prebuilt integrations? Look for a CDP that can adapt and integrate with multiple data types as well as all your existing data sources. Take a look at your marketing, sales and operational sources and see which data ingestion platforms it offers as existing integrations (for example, Adobe, AdRoll, Google Analytics and Salesforce). Support: How is the onboarding experience? What is the level and support offered by the CDP provider? Understand the value of the CDP and evaluate the steps it takes to prepare implementation, documentation and help when needed. By taking these additional factors into consideration, you can confidently choose a CDP that can provide long-term value to your businesses and support your growth and success. The cost of a customer data platform can vary depending on several factors, such as the size of your business, the number of profiles that need to be managed, the level of complexity of your data and the features and functionality you require. Some CDPs charge based on the number of customer profiles or records, while others charge based on the number of data or data processing. Some CDPs also offer free plans—this is ideal for organizations just getting started but free plans usually have a limited number of visitors and records per month. Many also offer a free trial allowing you to test the platform before committing to a paid plan. Entry-level pricing can range from \$120 a month to \$1,500 per month to \$1,500 per month to \$1,500 per month. provider and the features and services needed. Platforms that target mid-market to large companies often have higher price structures due to license costs, a more experienced sales team and dedicated customer success managers. There are many variables to consider when it comes to cost: The size of your contact database The number of events and sources collected from the site The number of users (per-user pricing is very common) The level of support included in the plan Basic functionality and add-ons The budget for your CDP It's also important to note, the cost of a CDP should be viewed as an investment in your business. It's also essential to factor in the potential return on investment (ROI) that you could achieve by using the platforms (CDPs) based upon five criteria: pricing, general features, additional features, additional features, and expert score. Here is a closer look at each of these criteria and how they were used to create this best-of list. Pricing When evaluating customer data platforms (CDPs), pricing is an essential factor to consider. As part of the evaluation process, pricing was scored based on the availability of a free trial, free version and public transparency of pricing. This factor accounted for 10% of the total weighted score. General Features We evaluated CDPs based on general features so that businesses could choose a platform that meets specific needs and requirements. These features included the ability to create a single unified view of each customer and compatibility with multiple devices. General features accounted for 30% of the total score. Additional features, the evaluation process of customer data platforms also includes additional features. These features have the ability to improve marketing efforts and drive revenue growth. Additional features we took into consideration included the ability to track and analyze key marketing metrics, predictive modeling, personalized product recommendations, campaign/timeline management and ROI tracking. These additional features accounted for 20% of the total score. Ratings and reviews A high number of ratings and reviews A high number of ratings and reviews indicate that the platform has been widely used and tested by a large number of businesses. We determined the scoring based on the number of reviews as well as platforms with an average rating of 3.5 or higher. This factor accounted for 10% of the total score. Expert Score We also evaluated the platform based on specific criteria such as any additional standout features or unique capabilities, the value of money, how it compares to competitors, how widely used it is within the industry and how user-friendly and intuitive the platform is. Our expert scoring a counted for 30% of the total score. A customer data platform is across all brand touchpoints. This data is then made available to marketing teams to be used for the creation of highly targeted ad and marketing campaigns. Examples of customer data from multiple sources to create one source of truth in the form of customer profiles. Both CDPs and CRMs collect data on customers to create single and complete customer profiles. However, while a CDP uses behavioral and interactional customer groups across channels, a CRM's data is used by sales teams to track and manage customer-facing interactions, such as customer support tickets and upsells. After you have selected the best customer data platform for your business, it is essential to identify which teams in your organization will be responsible for the setup process. These teams must include the CDP implementation in their product management road map and test the data to ensure its accuracy and effectiveness. In most cases, marketing teams will not have the necessary expertise to set up a CDP independently. Therefore, it is recommended to work with a marketing operations team. If available, tech or data teams should take on the responsibility of the setup process. According to an IBM report, 83% of companies suffer from data inaccuracy. That means the majority of data-driven companies are relying on dirty data to make smarter decisions. By paying close attention to data quality and ensuring they use clean data, companies can make smarter decisions. the first place is that data collection can get confusing very quickly. Companies often have multiple departments collecting many different data points on individual data . That can lead to each department collecting the same data point as another department, collecting data in the wrong ways, or collecting more data points than they need. The end result is too much useless data, which often leads to data security issues and confusion about what your company is doing with the data it's collecting. A good customer data management strategy can help you avoid confusing data like this. You'll get a lot more functionally out of your data if you have set guidelines for customer data management is and the principles behind it. What is customer data management is and the principles behind it. customers and ultimately increase conversions and retention. Customer data, and the security measures involved with storing and accessing this data. When talking about customer data management, we're usually referring to first-party data, meaning data collected by your company and used by your company. This can be anything from data about what visitors have purchased. Any software that stores customer data is involved in management, which is where it gets difficult and messy You might have three different tools used by three different departments all collecting the same customer information in slightly different ways. Organizing all of that data in a way that makes it useful for your entire company is the ultimate goal of customer data management. 6 principles for improving your customer data management When it comes to customer data management, there are six principles that you need to follow to make sure that your data works for you. Principle 1: Have a data governance will help you identify what data you will collect and how it will be collected. Data governance will also keep all employees on the same page about your plan for customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts: Alignment: This step standardizes customer data governance strategy will have three parts at a standardizes customer data governance strategy will have there parts at a standardizes c ensures that any changes to data collection will go through the proper channels so that all collected in the correct way. The end result of your data governance strategy will be a tracking plan, or data dictionary, that clearly explains every piece of data that you're collecting, who is using it, what it's being used for, and who owns it. Typeform is one company that benefited from implementing a data governance strategy. Prior to doing this, they didn't even realize how messy their data to use in analytics team tried to put their data to use in analytics team tried to put their data was. When someone on the marketing or analytics team tried to put their data was. which data was accurate and which data wasn't. Typeform also found that they had multiple events for different data points but with the same event name. That made it impossible to figure out why that data was being collected in the first place. Once they implemented a data governance strategy, they were able to clear up all of this confusion. Typeform now has standardized data that could be put to good use. Principle 2: Focus only on critical data You need to make sure you're only collecting data leads to your customer database that's actually useful to your customer data be put to good use. to you collecting data that makes your customers uncomfortable. Audit every piece of data you collect and ask yourself these questions: Who needs this data? If we didn't collect it, could we still operate in the same way? If you don't know the answers to those questions, that doesn't mean toss that data point out. Ask around. Maybe there's a reason for it. For example, let's say you're collecting data about the company revenue of your website visitors. Seems like that could be a good data point, right? But, when you ask the four questions we mentioned above, you find out that the data doesn't address any business needs, no one is using it, and not collecting it won't change a thing. In that case, get rid of it. Collecting unnecessary data can land your company in hot water. That recently happened to a publicly traded company is service. The FTC filed a complaint against the company, and as a result, they were faced with negative press and forced to reverse their decision. Principle 3: Avoid data silos Da governance or data orchestration strategy (and the fact that there are thousands of data analytics tools and data sources). Customer support, product, and dev teams all working with different tools, resources, and datasets is a recipe for confusion. For growing startups, every decision counts — especially those driven by customer data. As businesses strive to grow in competitive markets, the ability to understand customer data management for startups, as we explore its transformative potential to grow your small or medium business (SMB). What we'll cover: Customer data management (CDM) is the strategic process of collecting, storing, and leveraging customer information to fuel growth and enhance customer setter, tailor your customers better, tailor your products and services to their needs, and ultimately create lasting relationships that fuel your success. By harnessing the insights within your customer relationship management (CRM) system, you can identify trends, and innovate faster than your competitors. In fact, 92% of marketing teams use CRM tools to unify data and create unique customer profiles, highlighting its importance for startups. Beyond growth, CDM helps with customer satisfaction. By understanding customer preferences, pain points, and behaviors, you can deliver personalized experiences. This boosts loyalty and attracts new customers through positive reviews and referrals. With a solid customer data management platform in place, you're building a foundation for long-term success. Start with AI Basics For startups navigating a competitive market, customer data management in CRM business is more than an operational necessity — it's a strategic advantage. CDM enables you to create personalized experiences and behaviors. This understanding allows them to tailor offerings to individual needs, optimize marketing messages and foster customers value their experience with a company as much as its products, emphasizing the importance of personalized interactions. By leveraging customer data management software, you can build a loyal customer base that not only returns but also advocates for the brand. Startups often face limited resources, making data-driven decisions critical. With a CRM for SMB solution, you can: Segment customer bases accurately by analyzing detailed demographic and behavioral data to create precise groupings based on customer needs and preferences. Target marketing campaigns effectively by leveraging insights from customer data to craft tailored messages that resonate with each segment, improving engagement and conversion rates. channels, allowing you to focus time and budget where they deliver the greatest impact. By using customer relationship management data to inform your strategies, you can maximize your marketing and sales efforts, ensuring that every dollar spent yields the highest possible return. This is particularly crucial in the early stages when every resource counts. Customer data refers to information collected about customers, offering insights to inform strategy and improve customer experiences. It includes: Demographic data: Website visits, purchase history, and interactions. Transactional data: Purchase details, returns, and payment methods. CDM transforms raw information into actionable insights that can directly impact your business decisions. For example, analyzing transactional data helps you identify popular products, optimize inventory, and reduce waste. At the same time, examining behavioral data pinpoints effective marketing channels, enabling you to allocate resources for better campaign ROI and stronger customer engagement. With effective customer data management software, you can harness these insights to personalize marketing efforts with tailored messages and offers, enhance customer satisfaction by addressing specific needs and pain points, and fuel innovation by uncovering emerging trends and opportunities within your customer base. While essential, managing customer data presents unique challenges for startups like yours: Data silos and fragmented information: Integrating data collected from various sources (like social, email or marketing campaigns) into a unified system can be overwhelming, hindering comprehensive insights. SMB sales teams use an average of 10 channels to sell to customers, which can result in fragmented data, making it difficult to gain a holistic view of customer behavior and preferences. Inadequate data security measures: Data breaches are a constant threat. You must prioritize security measures like encryption and access controls to maintain trust and comply with regulations. A single data breach can damage your reputation and lead to legal and financial consequences. Limited resources and budget constraints: You may lack the budget for advanced customer data management software or skilled personnel to analyze data effectively. This limits your ability to leverage insights. Without the right tools and expertise, you might struggle to extract meaningful information from your data, hindering growth. Difficulty in integrating data from multiple sources: Using multiple tools for data collection leads to varying formats and structures. Merging this data accurately requires technical expertise and advanced tools. Investing in scalable solutions that handle data integration seamlessly is essential. To overcome the challenges of customer data management, focus on the following components: With artificial intelligence powered tools, you can pull from all touchpoints — customer interactions, purchases, or support queries — ensuring real-time, accurate updates. These tools centralize the data securely, ensuring it's always accessible without manual updates. Artificial intelligence (AI) is used to clean and aintain this data, reducing errors and ensuring it's reliable for every business decision. AI unifies data from multiple sources — such as CRM systems, external databases, and communication channels — into one centralized platform, ensuring consistency across your business. Salesforce's Data Cloud, for instance, connects and integrates data from various touchpoints, providing a single, reliable view of each customer and their journey. AI-powered analytics tools within Starter Suite automatically transform raw data into actionable insights. Using machine learning algorithms, these tools identify patterns and trends that help guide decisions in marketing, sales, and product development. Advanced reporting capabilities ensure you receive real-time, relevant insights, helping you receive real-time, relevant data is protected. Automated compliance audits are carried out using tools like Data Cloud, which monitor data privacy regulations and identify risks. Agentforce also helps enforce guardrails by ensuring all AI-driven actions comply with company policies and data protection rules, escalating to human intervention only when necessary. Get started with CRM and see results from day one with Starter Suite — the all-in-one suite with the marketing, sales, service, and commerce tools you need to succeed. Starter Suite, the AI-powered CRM for small businesses, gives you a comprehensive solution to efficiently manage your customer data and streamline your operations. Powered by AI, the platform provides you with a unified view of customer interactions, making it easy to capture and store all your customer relationships. Starter Suite automates and strengthen your customer relationships. tasks and helps you make data-driven decisions faster, all while saving you time and effort. With all of your customer data in one centralized place, it ensures a consistent and accessible record of interactions across various channels — email, phone, social media, and live chat. This allows you to segment customers based on criteria such as demographics and behavior, facilitating targeted marketing campaigns and tailored communications. By having all customer data in one place, you can make more informed decisions and provide a seamless customer churn to identifying sales trends, Salesforce AI enhances decision-making by offering actionable data. Dashboards and reports provide a clear view of key metrics, including sales performance and marketing effectiveness, helping you make informed business decisions. sales efforts. Automation features streamline workflows, reducing manual effort and improving efficiency. Tasks such as lead scoring, assignment, and follow-ups are automated, minimizing errors and ensuring accuracy. This allows you to focus on growth while maintaining consistent, high-quality customer service. By automating routine tasks, you can focus on more strategic initiatives. Agentforce extends customer service capabilities, providing omnichannel support through knowledge bases and portals, while also equipping agents with the tools needed to efficiently resolve customer issues. This combination drives improved customer satisfaction and productivity. By providing multiple channels for customer support, you can ensure that customer data management in any CRM requires a strategic approach. Here are some best practices to consider: Define clear goals and objectives: Clearly define what you want to achieve with your customer data, whether it's improving customer satisfaction, increasing sales, or enhancing marketing effectiveness. Choose the right tools: Opt for scalable platforms like Starter Suite that can grow with your business. The right tools will help you collect, store, and analyze customer data efficiently, ensuring that you can make data-driven decisions at every stage of your startup's growth. Train your teams understand the importance of CDM and how to use tools effectively. Provide training and resources to help your teams understand the importance of CDM and how to use tools effectively. and update processes: Stay agile by refining your approach based on results. Regularly review your CDM processes and make adjustments as needed. Tips for maintaining high-quality and secure this: To ensure accuracy, it's important to regularly update and verify your customer data. Clean data forms the foundation for informed decision-making and personalized experiences. To achieve this, implement automated processes that routinely validate and clean your data. information. By setting up these processes, you'll keep your data reliable, helping you make better decisions and provide a more tailored experience for your customers. Use encryption to secure sensitive information and implement access controls to ensure that only authorized personnel can access the data. This helps prevent data breaches and maintains customer trust. Ensure only authorized personnel have access to customer data. Regularly audit data access and ensures that your data remains secure. Adhere to standards like the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). Ensure that your data management practices comply with relevant regulations to avoid legal issues and maintain customer trust. Regularly review and update your compliance practices to stay current with changing regulations. Customer data management is a cornerstone of startup success. By investing in the right tools and strategies, you can fuel growth, enhance customer satisfaction, and secure your competitive edge. Start your journey with the Starter Suite today. Al supported the writers and editors of this article.