



Deciphering Data Platforms in a Nutshell

Retail Systems
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DATITUDE
DATA DRIVEN RETAILING

WHY THIS GUIDE?

Data solutions are like big data itself: vast varied & evolving at speed!

There's been a prolific rise in data platforms and tools, all helping to unlock the power of an organisation's data!

Customer data platforms (**CDP**), email service providers (**ESP**), marketing automation platforms (**MAP**), digital experience platforms (**DXP**), customer relationship management (**CRM**), data management platforms (**DMP**), product information management systems (**PIM**), data warehouses, data lakes, data integration platforms.....

We could go on, but you get the point – data solutions are like big data itself; vast, varied and evolving at speed.

There's a wealth of solutions to manage all your customer, marketing, product, and trading data and business intelligence (BI) needs, and platforms originally designed to serve a single purpose are increasingly morphing into wider solutions. For example, you can find a DXP or ESP that also offers a CDP. Similarly, some CDPs have evolved into the digital marketing space with ESP or marketing automation built-in.

If you're looking for a solution to serve your BI and analytics requirements, being able to differentiate between different platforms and tools will make a significant difference to how well you can access, use, and gain insights from your data, and avoid costly mistakes. After all, many organisations still struggle to integrate and unify their vast data volumes and realise its full potential.

To help you cut through the jargon and decipher the key differences, we've produced this guide to the most common BI, customer data, and martech platforms and tools, including our top tips on what to consider when looking for a data solution.



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DATITUDE'S QUICK GUIDE TO COMMON DATA PLATFORMS & TOOLS

Platform / Tool	What is it?	Who uses it (primarily)?	What's it used for?	Datitude's solution	Data types & retention periods
Customer Data Platform (CDP)	<p>Packaged software that creates a persistent, unified customer database that is accessible to other systems.</p> <p>Creates a comprehensive view of each customer by capturing data from multiple systems, linking information related to the same customer, & storing the information to track behaviour over time.</p>	Marketers	<p>Gaining a 360° view of customers to better understand & engage with. Building profiles, segmentation analysis, & better targeting of audience segments including "lookalikes".</p> <p>Enabling structured data to be made available to marketing automation platforms, DXPs, & other martech, including AdTech, for marketing communications & campaign delivery.</p>		<p>Structured & unstructured behavioural & transactional data from multiple sources (on & offline).</p> <p>Indefinite data retention.</p>
Email Services Provider (ESP) / Marketing Automation Platform (MAP)	Hosts a range of email, and / or cross channel, marketing services to streamline efforts & automate campaign management.	Marketers	<p>ESP – email marketing to customers & prospects.</p> <p>MAP – multi-channel journey & marketing campaign management from one platform.</p> <ul style="list-style-type: none"> • Create, build, & maintain subscriber lists • Create & send email campaigns including dynamic content • Campaign reporting & analytics • List segmentation • Forms & landing pages, A/B testing • Social media & mobile message management. 	 Marketing campaign analytics	<p>Structured data, predominantly work with owned data sources.</p> <p>Long term data retention.</p>
Digital Experience Platform (DXP)	An integrated set of core technologies for engaging different audiences across multiple digital platforms.	Marketers & Digital Teams	<p>Leveraging customer data in digital marketing channels & across touchpoints to improve the CX & enhance personalised experiences.</p> <ul style="list-style-type: none"> • Content management & media storage • Website, portal, & digital application development • Connecting customer data across digital channels to build profile (where integrated with a CDP) • Content performance & user experience analytics. 	 Connecting customer data across digital channels	<p>Structured and unstructured interactional and transactional data from multiple sources (digital channels).</p> <p>Long term data retention.</p>
Customer Relationship Management (CRM)	Maintains and manages customer (and prospect) interactions by storing customer-specific data. Organises unstructured data from multiple sources & touchpoints.	Customer Services, Sales & Marketers	<p>Managing interactions with customers & prospects across multiple channels & touchpoints, including recording preferences & activity, to help build customer relationships & streamline processes.</p> <p>Used extensively in B2B.</p>		<p>Predominantly unstructured, 1st party data from in-house sources.</p> <p>Long term, historical data retention.</p>

DATITUDE'S QUICK GUIDE TO COMMON DATA PLATFORMS & TOOLS

Platform / Tool	What is it?	Who uses it (primarily)?	What's it used for?	Datitude's solution	Data types & retention periods
Data Management Platform (DMP)	Gathers, organises, & stores audience & advertising campaign data from in-house systems (CRM, CDP, email, web) & third parties (data partners & co-operatives) for advertising purposes.	Publishers, Marketing Agencies & Marketers	Segmenting & categorising anonymous data to analyse & build detailed customer profiles to inform digital acquisition strategies – target segments, optimize ad spend & increase revenue. Collecting information on ad performance to analyse effectiveness & improve future spend.		Cookies, IP addresses and device IDs. Limited details stored for a limited, short, period.
Data Pipelines & Data Integration Platform	Pipelines enable data from multiple sources to be collected, sorted, mapped, & transformed into a single unified view. Data integration platforms enable the development, testing, running, & updating of multiple data pipelines.	IT Teams & Data Analysts	Consolidating, preparing, & centralising data from any source, into a data warehouse ready for analysis.	✓	Structured and unstructured data from multiple sources. A permanent database is not maintained.
Data Warehouse	A type of data management system designed to enable & support BI activities, especially analytics. By definition it's structured; containing data where the relationships & meanings have been considered & designed in advance for a specific purpose & are enforced at the point of storage. It puts the responsibility for making sense of the data onto the data warehouse designer rather than the person querying the data.	IT Teams & Data Analysts	Combining multiple data sources into a relational database to perform complex queries, compile reports, analyse data & generate BI from large amounts of historical data.	✓	Structured organisational data from multiple sources – financial, trading, customer, stock, sales. Long term data retention.
Data Lake	A data lake is the whole universe of your data; the idea is you go fishing in it & land some valuable insights. By definition, it is unstructured; storing both structured & unstructured data in its rawest form, for which the purpose is not yet defined. The responsibility for layering meaning & comparability onto it is left to the person or tool doing the querying.	Data Scientists	Low-cost storage for unformatted, unstructured data from multiple sources intended to be used for some purpose in the future. Primarily used by data scientists and highly skilled analytics experts, as requires specialist tools & skills to understand & translate the data, including machine learning.	✓	Any, and all, data, which is held indefinitely.
BI & Analytics Tools	A type of software application designed to retrieve, analyse, transform & report data, including visualisation, to produce effective & actionable business intelligence. The applications generally read data that has previously been stored in a data warehouse.	All business users	Querying & manipulating data from a single interface to derive analytics, visualisations, reports, & dashboards.	✓	Structured data from a data warehouse. Typically short to medium term data retention to keep performance high.

CUSTOMER DATA PLATFORMS (CDPS)

Are they all the same?

In a word, no! As CDPs have evolved, so has the functionality. Equally, many email service providers and marketing automation platforms have integrated CDPs into their offerings. Digital Experience Platforms have also come along, blurring lines further. The [CDP Institute](#) has categorised 4 types of CDPs:

Data CDPs

- gather customer data from source systems, link data to customer identities, and store the results in a database available to external systems.

Analytics CDPs

- provide data assembly plus analytical applications including customer segmentation. They may extend to machine learning, predictive modelling, revenue attribution, and journey mapping, and often automate the distribution of data to other systems.

Campaign CDPs

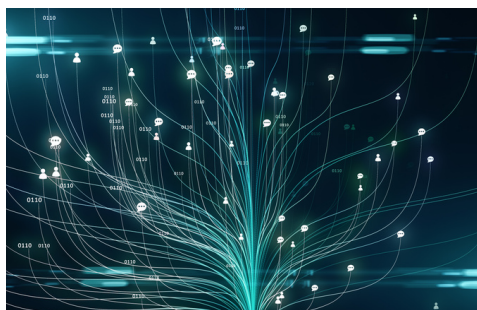
- provide the above, plus customer treatments (such as personalized messages, outbound marketing campaigns, real-time interactions, or product or content recommendations). What distinguishes them from the customer segmentation in an Analytics CDP is they can specify different treatments for different individuals within a segment and orchestrate different experiences across channels.

This is the level of **customer data functionality** Datitude offers within its Customer and Retail Data Platform.

Delivery CDPs

- provide all of the above, plus message delivery. Delivery may be through email, website, mobile apps, CRM, advertising, or several of these. Platforms in this category often started as delivery systems (ESPs), subsequently adding CDP functionality.

If you're thinking "isn't this the same as a Digital Experience Platform or Marketing Automation Platform?", you're not alone!



How do they differ from marketing automation & digital experience platforms?

In some instances, it may be just a name – the difference being the terminology used to categorise a platform's core functionality.

We call Datitude's platform a customer and retail data platform. It's a complete BI and customer data solution in one managed solution. So it's much more than a customer data platform and whilst you can leverage the data analytics for campaign planning and measuring marketing effectiveness, its core purpose is broader than marketing automation and digital experience platforms.



CHOOSING THE RIGHT DATA SOLUTION

Top tips

We could write a book on the different types of platforms and data solutions, including data architecture and strategy, but we think you'd get far more value from our top tips on what to consider if you're looking for a data solution.



Buyer beware!

Not all platforms and tools are created equal and there are diverse approaches to technology, integrations, functionality, and services. We can't stress enough there can be quite significant differences in platforms and tools, even within the same type of platform, as well as overlaps across categories, so do your research.



A little data is a dangerous thing – democratise it!

Before you start looking at solutions, we'd highly recommend talking to representatives from across the business (Tech, Digital, Ecommerce, Marketing, Trading & Operations, Product, Merchandising, Customer Services, Finance, Legal) to scope out what you want from a solution.

This is because unified data is immensely valuable in any business. It enables a data commonwealth; the value of which is far greater than the sum of the parts.

Your tech stack is the engine to power, and connect, all your data so a disciplined approach pays dividends. Multiple, disparate systems, point solutions, and data stores in your tech stack aren't the most cost-effective or efficient. It creates complexity if you want to unify data (customer, sales, stock) and provide a consistent, trusted, single view that's accessible to the whole organisation. Getting the most from your investment with a solution that meets the needs of the wider organisation now, and in the future, is common business sense.

Here are some pointers to consider as a starting point for initial research and discussions.



As-is situation

- What platforms and tools are currently in place and what are they used for?
- How is data currently integrated, processed, maintained, accessed, and analysed?
- What are the data sources, volumes, and types, and where is data stored?
- Why are you looking for a new solution – what are your pain points?

To-be requirements

- What do you want to do with your data and how may your needs change in the future?
- What workflows need to be supported and automated?
- Who will the users be, what are their personas (who, what, why, numbers, skillsets, access requirements, speed of data), and specific use cases?
- What will success look like?

Other considerations

- Open-source vs proprietary systems, cloud vs on-premise, batch orientated vs real-time stream processing, buy vs build
- Ease of integrations (out-of-box API or custom builds) and implementation, ability to scale
- Timescales, budget, terms of business, service delivery requirements.

CHOOSING THE RIGHT DATA SOLUTION

Top tips continued



Make sure it's the dog wagging the tail!

There's lots of amazing tech in the data solutions marketplace. We know as we've researched and adopted many in the data integration, data warehouse, data lake, and BI software space!

It's easy to be blown away by marketing messages, even so, it's like buying a new car – a shiny front-end can be impressive but it's what's under the bonnet that differentiates performance. Check the engine can power, connect and transform all your data for your needs and the mechanics know what they're doing and can service your needs.

Can Datitude help you?

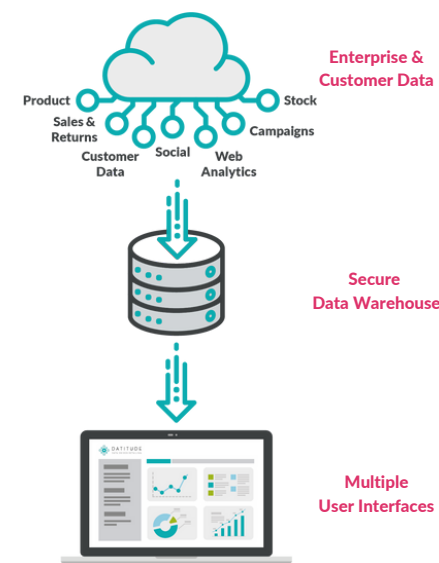
Ultimately your choice of solution will depend on numerous factors including your business size, budget, resources, current set-up, essential requirements, and most importantly, the use cases you want to solve. There's a wealth of solutions in the market and you're sure to find one that meets your needs.

If you'd value some expert input along the way, we'll happily give you our honest, and straightforward, view on all things data, including what might be the right solution for your needs and budget, recognising our platform may not be it.

Equally, if you just want to talk through the pros and cons of PowerBI vs Tableau, cloud vs on-premise data storage, data warehouse vs data lake, we'll happily chat. We'll even buy the coffee!

If you're looking for a complete solution to integrate your trading and customer data from multiple sources and transform it into a single unified view, with dynamic reports, dashboards, and rich analytics built-in and automated as standard, plus a choice of front ends, ask for a demo of our platform.

It's a hybrid solution; combining data lake and data warehouse, systems integration, and business intelligence in a single managed solution. We process raw data into standardised, highly validated, and user-friendly data models, making standardised reports, insights, and extracts fast, reliable, and repeatable... AND... we keep all the raw data too so it can be queried directly by the data scientists among you to gain new insights... which can then be standardised for end-users into the data warehouse. It's what we call data with attitude!



WHAT PEOPLE SAY ABOUT DATITUDE

The key to **unlocking** our growth potential.

Gives us a **true customer perspective**.

Many say they understand retail which is a bit superficial – you have designed a **whole solution around a true understanding of retail**.

After years of searching, you really are **the most complete solution in the marketplace**.

Our **daily go-to** for all performance reporting & customer insights, helping to shape business decisions.

Everyone else we spoke to can either do data integration, or reporting, **not both**.

A key factor is **you can front end your solution with BI tools** (like Tableau, PowerBI, etc) **AND also use Excel** which nails it given the skills and preferences of our user-base.

HOW TO GET IN TOUCH

If you're ready to take the lead in driving customer value and profitable growth using the most complete data solution in the marketplace, we'd love to talk!



Email: hello@datitude.co.uk
Call: 020 3003 5000
Web: datitude.co.uk/contact
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