

Customer Data Platform

A customer data platform is a type of packaged software which creates a persistent, unified customer database that is accessible to other systems.

Example - Lemnisk, Tealium, Evergage, Blueshift, Lytics, etc

Marketing Automation Systems

Marketing automation refers to software platforms and technologies designed for marketing departments and organizations to more effectively market on multiple channels online and automate repetitive tasks.

Example: Marketo, Hubspot, Salesforce, Userfox, etc.

Here are a few points of difference between MAS and CDP to help financial marketers understand why a Customer Data Platform scores over a Marketing Automation System.

DATA MANAGEMENT	MAS	CDP
Organize data from different sources	✓	/
Aggregate and unify customer data from different sources	×	~
Create a single user view	×	✓
DATA SHARING	MAS	CDP
Drive core automation features	✓	✓
Integrated data sources	×	✓
Real time data sharing with connected systems	×	✓
DERIVING ACTIONABLE INSIGHTS	MAS	CDP
Drive campaigns based on the data that is fed to it.	✓	✓
Derive insights to fuel and craft the right marketing campaign for a customer	×	✓
Campaign Management	×	✓
Personalized marketing	✓	✓
Control all aspects of the campaign from a strategic standpoint	✓	✓
Manage multiple platforms and channels from one central location	✓	✓
Personalized communication at user level	×	✓
Real- time personalization	×	✓
Cross-channel personalization based on users' online behavior	×	✓

