



CDP LOOKBOOK

PRIVACY-COMPLIANT MARKETING

**HOW ZEOTAP CDP CAN HELP YOU
MANAGE AND ACTIVATE YOUR CUSTOMER
DATA IN A PRIVACY-COMPLIANT WORLD**



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INTRODUCTION: THE REALITY OF MARKETING IN A PRIVACY-FIRST WORLD

In recent years, the data privacy landscape has experienced an incredible shift, with consumers demanding more control over their personal data, and their concerns codified through laws like GDPR in Europe. To comply, businesses are now required to shore up their consent practices and protect their customers' personal data, or face hefty fines and damage to brand reputation (and by extension, revenue).

To make matters even more challenging, there's a ticking clock on third-party data with [the upcoming deprecation of third-party cookies](#). This means that marketers are under pressure to rely more on their first-party data to continue to deliver accurate, effective marketing.

This creates something of a Catch 22 - on the one hand, marketers are under pressure to gather and use more customer data. On the other, doing so involves navigating choppy waters of risk. This is where a privacy-first Customer Data Platform like Zeotap CDP becomes a necessity, and in this guide you'll see some of the key ways in which it helps you drive marketing success in the age of data privacy.

THE CORE PRINCIPLE: A SINGLE CONSENT VIEW

When it comes to data privacy, the marketer's key problem is a cross-channel one. In our digitalised space, consumers can consent to different kinds of communication, at different times and across different channels and on different devices.

For example, a customer could give consent for email marketing while making their first purchase online, but could then retract that permission whilst signing up for a loyalty scheme. In the meantime, they could give consent to marketing cookies whilst browsing the website, but later withdraw it.

To make matters worse, all this data is typically organised by different internal departments and in different systems – for example, customer service, finance and marketing. These individual collections of data grow into separate silos that become fragmented and may use different taxonomies. By failing to marry this information together, a clear and actionable view of a customer becomes impossible.

These siloed views of customer data are problematic enough - but from a data privacy perspective, they're potentially disastrous.

For example, that customer who withdraws consent for email marketing whilst signing up for a loyalty card (having previously consented), may continue receiving unwanted emails if their consent preferences are stuck within the loyalty system and fail to be relayed to the email service provider.

And with your customers, one wrong move in consent orchestration will cause them to walk away: when asked in a recent survey what they would do if they were contacted via a channel where they did not provide consent, [57% of them agreed that they would cut ties with that company altogether.](#)

THE CORE PRINCIPLE: A SINGLE CONSENT VIEW

This is where a special kind of CDP comes in. You've heard of the 'single customer view' - the holistic profile of a customer's data unified from all sources - but now it's time to add a 'single consent view' to that. This is where consent preferences are unified, mastered, and stored as part of the profile, ready to be relayed to integrated tools for execution and activation:



This works by unifying IDs from online and offline sources, including consent and marketing preferences, making data available in a marketer-friendly platform for easy segmentation and activation.

The reality here is harsh - without a single consent view, as a marketer you'll never be sure that you're acting according to your customer's most recent and most accurate preferences - and as such, you can never be sure that you're working in accordance with the law.

Put simply, without a single consent view your hands are tied - the mountains of quality data you've invested in gathering and storing may as well disappear, for all you can do with them. To take action, **the single consent view needs to be at the foundation of your activity.**

It's worth noting that not every CDP can deliver a single consent view; the majority of Customer Data Platforms were born in (and are therefore built for) North America, where data privacy constraints are looser than what's experienced in Europe. Zeotap CDP was forged in the fire of probably the strictest data protection environment in the world: Germany. As such, it's designed with data privacy at its core - including a single consent view.

Next, we explore four key ways that this can empower your marketing efforts.

USE CASE 1

INCREASE RETENTION AND CUSTOMER VALUE



THE CHALLENGE



Effective upselling and retention efforts have the advantage of (in theory) plenty of individual-level customer data behind them in order to drive personalised, well-timed Next Best Action (NBA) or Next Best Offer (NBO) efforts.

However, in order to do that, that data not only needs to be unified but also made actionable through the unification of consent.

THE SOLUTION



1. Zeotap CDP creates a single customer profile that incorporates consent and marketing preferences, configuring them to your communication channels.
2. Using Zeotap CDP's Predictive Audiences functionality, create machine-learned segments based on RFM (Recency-Frequency-Monetary) or Customer Lifetime Value in order to identify your best audiences for potential upsell or retention campaigns.
3. Activate these audiences directly using over 100 integrations; pre-set rules will ensure that you're unable to target any customers who haven't given the right consent for your chosen channel.

THE RESULT



5.5%

**UPSELL LIFT
FOR A LEADING EU
INSURANCE COMPANY.**

12%

**INCREASE IN
RETENTION RATE FOR
A TOP GERMAN BANK.**

USE CASE 2

CUT CAMPAIGN DELIVERY TIME



THE CHALLENGE



For marketers, moving fast can be the difference between success and failure. Unfortunately, one of the key reasons for slowing down delivery time on a campaign is making sure that it's up to code when it comes to data privacy.

Data Protection Officers (DPOs) are usually the gatekeepers here - but they juggle business-wide requests and can easily become a bottleneck to a marketer who needs to go live.

THE SOLUTION



1. Zeotap CDP creates a single customer profile that incorporates consent and marketing preferences, configuring them to your communication channels.
2. Using Consent Orchestration within Zeotap CDP, the DPO can then easily create universal rules for how data can (and can't) be activated according to consent and user preferences.
3. With these 'guardrails' in place in a 'one and done' approach, the marketer can then create and activate campaigns rapidly without the need for DPO checks each time.

THE RESULT



**REDUCED TIME TO
UNIFIED CONSENT BY UP TO** **100%**

USE CASE 3

MEET REQUESTS FOR
DATA DISCLOSURE AND DELETION



THE CHALLENGE



The California Consumer Protection Act (CCPA) and the European Union's General Data Protection Regulation (GDPR) are just two data privacy laws that require businesses to provide a comprehensive collection of all data they have on a user upon request. Furthermore, under various data privacy rules, consumers are entitled to request deletion of all the data held on them by a business.

The problem comes when this data sits in silos, making it more difficult to know where your customer data is and to access it in a timely manner. Gartner data shows that for a Data Protection Officer (DPO) to manually process a Data Subject Access Request (DSAR), it costs a business around \$1,400 per request due to the time and effort spent on a manual process.

THE SOLUTION



Zeotap CDP can be invaluable in this scenario as it helps to destroy data silos. The unified view of a customer can be used like a map to help you identify data flowing into the CDP from both upstream systems (like a CRM or order management platform), and downstream systems (such as email or SMS providers).

The CDP leaves the source and upstream systems untouched, and won't erase anything - it leaves the responsibility for this with you. However, it allows you to much more quickly identify and access the source systems where customer data must be erased, instead of needing to resolve disparate fragments of data stored in different systems, saving hours of expensive time and effort.

THE RESULT



TIME SAVED FOR BOTH MARKETING, CUSTOMER SERVICE AND DATA PROTECTION TEAMS.

USE CASE 4

IMPROVE YOUR OPT-IN RATES



THE CHALLENGE



Being able to secure consent for marketing is a make-or-break issue for today's marketer - but one where most elements of the marketing stack can only provide tactical solutions (such as adding checkboxes or pop-ups).

What marketers really need is to understand where their efforts at gaining consent are working, and where they're not - a framework not unlike Conversion Rate Optimisation, but for consent. With this analysis in hand, they're empowered to make the right changes to increase opt-in rates and therefore boost all marketing efforts.

THE SOLUTION



Consent Analytics, a feature of Zeotap CDP, identifies trends in your customer consent and marketing preferences data to drive more informed decisions on opt-in rate initiatives. It delivers real-time analysis of customer opt-in rates by source, via a simple user interface, presented in easy-to-understand charts and graphs.

With this analysis in hand, you can optimise your marketing initiatives to deliver higher opt-in rates, directly supporting your key marketing goals.

THE RESULT



**FULL VISIBILITY ON CUSTOMER OPT-IN RATES ACROSS
YOUR DIFFERENT CHANNELS.**

EXPLORE **ZEOTAP CDP**

Zeotap's Customer Data Platform helps ensure your organisation remains compliant with constantly evolving consumer data regulations , whilst delivering an omnichannel experience capable of bolstering brand loyalty and providing personalised customer experiences.

To find out more about how **Zeotap CDP** can support your key challenges, get in touch for a no-obligation consultation.

www.zeotap.com.

WITHOUT ZEOTAP	WITH ZEOTAP
<ul style="list-style-type: none">➔ Heavy manual work for data teams to stitch IDs together and filter for consent➔ Risk of targeting the wrong customer unless the consent strings of all IDs are unified	<ul style="list-style-type: none">➔ Reduced time to unified consent by almost 100%➔ Exclusion and inclusion rules can be pre-set

ZEOTAP

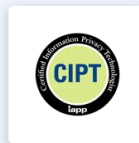
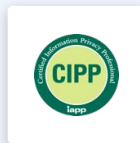
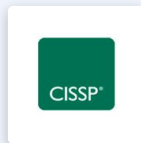
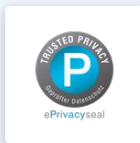
THE NEXT GENERATION CUSTOMER DATA PLATFORM

Zeotap creates unity between data and privacy to power personal and trusted customer experiences. At its heart is **Zeotap CDP**, the next-generation Customer Data Platform that empowers marketing and data teams to collect, unify, segment and activate customer data while putting privacy and compliance front-and-centre. Complemented by **Zeotap Fuel**, a data asset designed to deliver quality without compromising on data privacy, Zeotap also offers **ID+**, a universal marketing ID. Recognised by **Gartner** as a "Cool Vendor" and G2 Crowd as a **CDP Momentum Leader**, Zeotap works with market-leading brands including **P&G**, **Audi** and **Virgin Media**. For more information visit www.zeotap.com.



PRIVACY AND SECURITY IS IN OUR DNA

Designed in Germany for the stricter compliance standards of operating in Europe



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