

# CDP Institute

## Use Case Generator



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V1.0

# Use Case Generator - Introduction

The CDP Institute Use Case Generator is an online system that collects information about your use case and transforms it into a standard use case format. Data is collected through a series of online forms. After the forms are submitted, the system automatically creates the formatted use case and emails it to you as a Word doc. After you have completed the process, you can return later to change your answers or add more information.

This process begins with **General Descriptive Information**, which you should already know before starting. It then asks you to describe which tasks (the General Purpose) that are required for your use case, starting with **Data Assembly**, **Data Analysis**, **Predictive Modeling**, **Outbound Campaigns**, **Real-Time Interactions** and ending with **Orchestration**.

Nearly all use cases will require data assembly unless you already have a CDP in place. Many will require more than one of the other functions, such as predictive models as input to real time personalization. You can also indicate other and don't know as you need.

**This final page of this document contains the link to the Use Case Generator forms.**

# Use Case Generator - General Descriptive Information

The general description of your use case start with the Name, Problem, Benefits and Solution.

Section	Description
Name	Name: Start by giving your use case a name, e.g. "Personalized Subscription Offers".
Problem	Problem: Describe the situation and problem to be solved e.g. "Current subscription offers are not personalized to the individual, and we are missing opportunity to improve subscription conversion and resulting revenue"
Benefits	Benefits: Describe benefits of this use case e.g. "Higher subscription revenue, driven by ability to better understand and personalize communication to our prospects and subscribers"
Solution	Solution: Describe how this use case solve the problem e.g. "Develop predictive models to select best subscription offer per person and deploy these across inbound and outbound channels"


# Use Case Generator - General Descriptive Information

The general description continues with the Goals, Industry, Systems or Channels Used, and the Required Data.

Section	Form has <b>Radio Buttons</b> <input type="radio"/> and <b>Checkboxes</b> [ X ] for these questions
Goals	<u>What are the goals of your use case?</u> For example, Awareness, Acquisition - Conversion, Customer Value, Retention, Expense Reduction, Other.
Industry	<u>Which industry does your use case apply to?</u> For example, Retail, Media/Publishing, Financial Services/Insurance, etc. and Other.
Systems or Channels Used	<u>How would each of these systems or channels be used in this use case,</u> (Provide Data or Receive Data)? For example, Web site / Web CMS, Email / Marketing Automation, DMP / Web Display Ads, Social Media Ads, CRM (Sales, Service, Call Center), etc. and Other.
Required Data	<u>What data types will be required for the use case?</u> For example, Personal identifiers: name, email, postal address, telephone, etc., Web behavior, Transactions/purchases, Customer service interaction, Marketing messages sent and responses, etc. and Other.

# Use Case Generator - General Purpose

Which of the following most closely describes your use case? (select one)

Section	Form has a <b>Radio Button</b>  for this question
Unified Data – Data Assembly	Unified Data: A unified customer data set that will be used for multiple purposes. Example use cases: Data Quality, Golden Record, Lead to Account Match, Data Enhancement, Privacy Compliance, Combine Online and Offline Purchase Data.
Data Analysis	Data Analysis: completed data analysis project. Example use cases: Customer Journey Mapping, Lifetime Value Analysis, Segment Discovery, Find High Value Customers, Identify Channel Preference, Measure Campaign Effectiveness, KPI Reporting.
Predictive Model	Predictive Model: Scores or recommendations from a predictive model. Example use cases: Customer Value Prediction, Topic Interest Prediction, Churn Prediction, Best Offer Selection, Product Recommendation, Prospect Selection, Engage Time Optimization, Channel Preference Identification.
Outbound Campaigns	Outbound Campaigns: Audience for an outbound marketing campaign. Example use cases: Email List Creation, DMP Integration, Social Media Audiences, Abandoned Cart Campaigns, Trigger Messages, Exclude Previous Buyers, Personalized Message Selection.
Real-time Interaction	Real-time Interaction: Messages during a real-time customer interaction. Example use cases: Real-Time Behavioral Profiling, Real-Time Offer Selection, Real-Time Content Recommendations, Cross Sell/Upsell Recommendations, Real-Time Location-Based Personalization, Call Center Agent Access to Unified Customer Data.
Orchestration	Orchestration: Instructions to orchestrate messages across channels. Example use cases: Cross-Channel Message Orchestration, Retention Campaigns.

# Use Case Generator - General Purpose

Typical flow of general purpose dependencies. Data analysis requires unified data, predictive model requires unified data plus data analysis; outbound campaigns require unified data, data analysis, and predictive models;, and so on.

## Typical Dependencies

		Use Case Type					
		Unified Data	Data Analysis	Predictive Model	Outbound Campaigns	Real-Time Interaction	Orchestration
Required Functions	Unified Data	●	↓	↓	↓	↓	↓
	Data Analysis		●	↓	↓	↓	↓
	Predictive Model			●	↓	↓	↓
	Outbound Campaigns				●	↓	↓
	Real-Time Interaction					●	↓
	Orchestration						●

# Use Case Generator – Task Details

For **each** of the general purposes ((Unified Data, Data Analysis, Predictive Model, Outbound Campaigns, Real-time Interaction, Orchestration), three sections of **task details** are collected. These sections are summarized below, with examples.

Task Section	Form has a <b>Checkboxes [ X ]</b> for these questions
Functions	The <b>functions</b> include tasks that need to be done for the use case to be completed. For example, unified data might require data ingestion cleaning and resolved identities. Data analysis might require marketing attribution or lifetime value analysis.
Involved	The <b>involved</b> includes the task of defining who or what groups of people need to be involved. For example, that might include Marketing technology, Marketing operations, Marketing management, Corporate IT, Legal/compliance/privacy, Data science/analytics, Sales team, Service team, or Other groups.
KPIs	The <b>KPIs</b> (Key Performance Indicators) are the metrics and measures need to monitor the performance of the use case. Examples might include, Labor time and elapsed time to complete each project, Number of projects completed, Number of campaigns deployed Number of customers in deployed campaigns, Campaign performance (response rate, revenue, profit contribution, lifetime value impact, lift vs control), User satisfaction with project results.

# Use Case Generator – CDP Features

The final section of the Use Case Generator ask if any of the primary CDP features are required for the use case. As with the other sections, there are [Checkboxes \[ X \]](#) for these questions.

Web Site Tag	Persistent ID	Manual Predictive
Cookie Management	Postal Address Hygiene	Automated Predictive
Ingestion API	Name/Address Match	Real-Time Access
Ingestion SDK (mobile app)	Probabilistic Match	Real-Time Messages
Client-Built Data Load	Golden Record	Multi-Step Campaigns
End-User Data Load	Account-level Data	Cross-Campaign Arbitration
Schema-Free Data Load	Lead-to-Account Match	Multi-Channel Campaigns
Real-Time Data Load	Direct Access	Dynamic Content



# Use Case Generator – Ideas for Use Cases

The CDP Periodic Table can give you ideas for use cases, as color coded by General Purpose. A more complete description of the table may be found at <https://www.dataem.com/cdp-periodic-table> and the definitions of the use case elements may be found at <https://www.dataem.com/element-definitions> .

1 <b>G</b> Golden Record	2 <b>D</b> Data Quality	<div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div style="text-align: center;"> <span style="background-color: #ffffcc; border: 1px solid black; padding: 2px;"> </span> Extract, Unify, Expose Data         </div> <div style="text-align: center;"> <span style="background-color: #ccccff; border: 1px solid black; padding: 2px;"> </span> Real Time Interactions         </div> <div style="text-align: center;"> <span style="background-color: #ffcc99; border: 1px solid black; padding: 2px;"> </span> Predictive / AI         </div> </div> <div style="display: flex; justify-content: space-around; align-items: flex-start; margin-top: 5px;"> <div style="text-align: center;"> <span style="background-color: #ffccff; border: 1px solid black; padding: 2px;"> </span> Analyze Data         </div> <div style="text-align: center;"> <span style="background-color: #ccffcc; border: 1px solid black; padding: 2px;"> </span> Outbound Campaigns         </div> <div style="text-align: center;"> <span style="background-color: #ccffff; border: 1px solid black; padding: 2px;"> </span> Omni Channel         </div> </div>										41 <b>Ba</b> Behavior Analysis	42 <b>J</b> Journey Analytics
3 <b>Oi</b> Online Instore Combination	4 <b>P</b> Privacy - GDPR Compliance	11 <b>Ch</b> Churn Prediction	12 <b>V</b> Value Prediction	13 <b>Li</b> Loyalty Incentives	22 <b>B</b> Behavior Real Time Profiling	23 <b>C</b> Content In Real Time	32 <b>Sm</b> Social Media Audiences	33 <b>A</b> Abandoned Cart	34 <b>Dy</b> Dynamic Email List Creation	43 <b>Hv</b> High Value Customers	44 <b>Ca</b> Campaign Attribution		
5 <b>Ob</b> Onboarding External IDs	6 <b>Le</b> Lead To Account Match	14 <b>Ps</b> Prospect Selection	15 <b>Bo</b> Best Offer Selection	16 <b>Et</b> Engage Time Optimization	24 <b>Os</b> Real Time Offer Selection	25 <b>Dc</b> Dynamic Cross Sell Upsell	35 <b>Fe</b> Feature Notifications	36 <b>Pm</b> Personalized Messages	37 <b>Re</b> Reactivation Campaigns	45 <b>Bc</b> Best Customer Analysis	46 <b>Us</b> Underserved Segments		
7 <b>Ed</b> Enrichment Data Append	8 <b>Tg</b> Less Tag Mgmt Mapping	17 <b>Lm</b> Lookalike Models	18 <b>Tp</b> Topic Interest Prediction	19 <b>Id</b> Intent Data	26 <b>Ip</b> Individual Profiles	28 <b>Cp</b> Channel Preference	38 <b>Tr</b> Trigger Messages	39 <b>Dm</b> DMP Interactions	47 <b>Kp</b> KPI Reporting	48 <b>Eb</b> Events Based Geomapping	49 <b>Ls</b> Life Stage Assignment		
9 <b>Oc</b> Online CRM Combination	10 <b>Mg</b> Merger Before After Compare	20 <b>Un</b> Unsubscribe Prediction	21 <b>Rp</b> Repurchase Prediction	27 <b>Lb</b> Location Based Personalization	29 <b>Cs</b> Preemptive CS Support	30 <b>Rt</b> Retention Campaigns	31 <b>Cc</b> Cross-Channel Campaigns	40 <b>Pb</b> Previous Buyer Exclusions	50 <b>Sd</b> Segment Discovery	51 <b>Sa</b> Segment Assignment	52 <b>Rs</b> Run Stream Tests		

# Use Case Generator – Where is it?

The Use Case Generator is hosted on Google Forms and is accessible from the link below.

<https://bit.ly/UseCaseGenerator>

*Note: The link above is Case Sensitive*

Once you have completed your entry, you will receive an email with your use case attached.

You will also receive a notice that, “Your responses have been recorded and a Use Case is being generated for you. Save the link below to return and make modifications.” If you return to make modification and would like a revised output of your use case, you need to notify us at BrentJDreyer@DataEM.com.