



CERTIFICATION PREPARED FOR

ActionIQ

2024 UPDATE March 31, 2024
AUDIT COMPLETION May 22, 2022

CONFIDENTIAL



HEREBY GRANTS THIS

RealCDP CERTIFICATE 2024

PRESENTED TO

ActionIQ

Entitled to be known as a RealCDP™ and authorized to display the RealCDP™ badge for successfully completing a comprehensive evaluation and providing satisfactory proof that meets all qualifications set forth by the Customer Data Platform Institute.

In Witness Thereof, this Thirty-First day of March 2024.

A handwritten signature in black ink, appearing to read 'David M Raab', written over a horizontal line.

DAVID RAAB
President, CDP Institute



A handwritten signature in black ink, appearing to read 'Vernon Tirey', written over a horizontal line.

VERNON TIREY
RealCDP Auditor



Confidential Report For: **ActionIQ**

Audit Complete Date: **5/22/2022**



- ✓ **Ingest Data**
- ✓ **Maintain Data**
- ✓ **Store Historical Data**
- ✓ **Unified Customer Profile**
- ✓ **Privacy**
- ✓ **Share Customer Data**
- ✓ **Real Time Data Updates**

ActionIQ CDP meets all core RealCDP certification requirements. ActionIQ supports both B2C and B2B enterprises across a variety of industries with a SaaS platform hosted in AWS. Data can be ingested from any source in any format and is loaded into S3 buckets prior to data transformation, cleaning, and matching. An extensive library of pre-built connectors provide smooth data transfer to and from leading martech and data management systems. The InfiniteCompute capability ensures that full data detail history is retained (no limits) and scales dynamically to ensure best-in-class processing times. Unified customer profiles are created using AI-driven deterministic and probabilistic matching (PersonMatch ID resolution). Data models are custom-built and include derived/calculated variables created by ActionIQ. The ActionIQ tag helps build anonymous profiles in combination with Neustar and LiveRamp data to enhance targeting for online advertising. The platform has robust privacy management, is GDPR and CCPA compliant, and it integrates with 3rd party tools like OneTrust for consent management. Real time updates are enabled and synced with customer-facing external systems for maximum messaging relevance.



- ✓ **Channels Supported**
- ✓ **Data Sources Supported**
- ✓ **3rd Party Applications**
- ✓ **Real Time Processing**
- ✓ **Data Hygiene**
- ✓ **End User Training**

ActionIQ CDP meets all enhanced RealCDP requirements. All channels are supported for both data ingestion and data distribution with approximately 400 pre-built connectors. Data can be imported from any source in any format. ActionIQ's PersonMatch module is AI-driven and builds robust customer profiles that are enhanced with the inclusion of 3rd party ID graphs and other data enhancement sources. These profiles are then seamlessly shared with external martech customer engagement systems to deliver highly-targeted messages; this can be done in near real time. Real time processing is strong with InfiniteCompute's dynamic scaling to process large data volumes at very high speeds. Data hygiene is top-notch and includes postal processing in addition to other 3rd party data (if desired). Customized user training is provided for IT, analytic, marketing ops, and CX teams and is augmented with workshops and weekly conference calls. An online training portal with videos is also provided and ActionIQ's customer service team is available for additional support.



- ✓ **Analytics & Reporting**
- ✓ **Model Building & Scoring**
- ✓ **Personalization**
- ✓ **Journey Orchestration**

ActionIQ CDP meets all CDP Stack requirements. Users can easily explore their data to see sample rows and values and get test counts on audiences. Dashboards are included that can be configured by marketing users for further insights. More powerful reporting is accomplished via tight connections to leading BI tools such as Domo, Looker, Tableau, etc. Modeling capabilities are flexible; externally-built model algorithms can be integrated into the platform or models can be built inside the platform by ActionIQ. Scores created by external systems can be imported into the platform. Personalization capabilities are stronger than most CDPs as users have access to full historical detail data when using the boolean drag-and-drop audience builder. Audience building is intuitive and iterative. Once created, audiences can be delivered to external advertising or customer engagement systems with a single click or can be brought into a more complex treatment in the multi-step, multi-channel journey orchestration tool, which includes testing splits, time delays and triggers.

OTHER

ActionIQ's Pipelines and HybridCompute are two new 2022 capabilities that will provide clients and partners more streamlined control over data management processes. Pipelines provides direct data process configuration access for clients and partners which will ease reliance on ActionIQ teams. HybridCompute provides the ability to access data directly within existing data stores without having to move data in or out, saving steps and time.

SUMMARY

ActionIQ CDP is a RealCDP and excels at integrating customer data into a powerful unified customer profile that can be leveraged across hundreds of martech applications. Industry analysts give ActionIQ top ratings for their system architecture. Clients with large data volumes and complex business/data environments benefit from ActionIQ's tight focus on data speed and quality. ActionIQ's hands-on approach to implementation assures shorter time-frames and higher success rates than many CDPs and clients benefit from strong training offerings and a solid customer support team.



ActionIQ Findings

The CDP Institute audits 17 CDP related capabilities. Below are the high-level findings for ActionIQ.

Requirements fall into three categories:

- ✓ Meets All Requirements
- ✓ Meets Some Requirements
- ✗ Meets No Requirements

CAPABILITY	TYPE	Findings
✓ Ingest Data	Core CDP	Meets all requirements
✓ Maintain Data	Core CDP	Meets all requirements
✓ Store Historical Data	Core CDP	Meets all requirements
✓ Unified Customer Profile	Core CDP	Meets all requirements
✓ Privacy	Core CDP	Meets all requirements
✓ Share Customer Data	Core CDP	Meets all requirements
✓ Real Time Updates	Core CDP	Meets all requirements
✓ Channels	CDP Enhancement	Meets all requirements
✓ Data Sources Supported	CDP Enhancement	Meets all requirements
✓ 3rd Party Applications	CDP Enhancement	Meets all requirements
✓ Real Time Processing	CDP Enhancement	Meets all requirements
✓ Data Hygiene	CDP Enhancement	Meets all requirements
✓ End User Training	CDP Enhancement	Meets all requirements
✓ Analytics & Reporting	CDP Stack	Meets all requirements
✓ Model Building & Scoring	CDP Stack	Meets all requirements
✓ Personalization	CDP Stack	Meets all requirements
✓ Journey Orchestration	CDP Stack	Meets all requirements

Directory of Audited CDP Capabilities

For a full description of CDP capabilities please see the [RealCDP Audit Guide](#). Below is a brief description of each CDP capability reviewed in the RealCDP Certification Audit. To qualify as a RealCDP a vendor must fully support all Core CDP capabilities.

CAPABILITY	TYPE	DESCRIPTION
Ingest Data	Core CDP	Data ingestion and data capture capabilities for all data types
Maintain Data	Core CDP	Maintain and manage all required customer and demand-side data
Store Historical Data	Core CDP	Store all detailed historical and longitudinal data required by Users
Unified Customer Profile	Core CDP	Create and manage unified customer profiles
Privacy	Core CDP	Manage personal identifiers, consent & privacy management, privacy enforcement
Share Customer Data	Core CDP	Distribute and/or syndicate data wherever (and ideally whenever) needed
Real Time Updates	Core CDP	Capture, update, share, and decision data in real time
Channels	CDP Enhancement	CDP supported Channels and available Connectors to capture and distribute data
Data Sources Supported	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
3rd Party Applications	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
Real Time Processing	CDP Enhancement	Enhanced Real-time processing update capabilities (ideally in sub-second speed)
Data Hygiene	CDP Enhancement	Data scrubbing, filtering, standardizing, formatting, and matching capabilities
End User Training	CDP Enhancement	End User training, workshops, documentation, and educational materials
Analytics & Reporting	CDP Stack	Report building and sharing for data, program performance and customer analytics
Model Building & Scoring	CDP Stack	Model development and data scoring in support of targeting and decisioning
Personalization	CDP Stack	Customer Personalization solutions including tools, technologies, and techniques
Journey Orchestration	CDP Stack	Customer Journey Orchestration solutions for multi-touch, multi-channel marketing