RealCDP

CERTIFICATION PREPARED FOR

Twilio Segment

2024 UPDATE March 31, 2024
AUDIT COMPLETION June 10, 2022

CDP

CUSTOMER DATA PLATFORM

INSTITUTE

HEREBY GRANTS THIS

RealCDP CERTIFICATE 2024

PRESENTED TO

TWILIO SEGMENT

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.

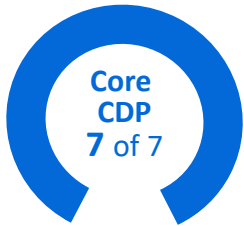In Witness Thereof, this Thirty-First day of March 2024.

David M Raab

DAVID RAAB
President, CDP Institute

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Vernon Tirey

VERNON TIREY
RealCDP Auditor

RealCDP Audit Report

Core CDP 7 of 7

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

Segment meets all RealCDP certification criteria with the Segment Customer Data Platform (CDP) that supports B2C, B2B, and B2B2C companies. This easy-to-use no-code platform is delivered as a SaaS solution running on AWS S3 and allows data-driven marketers to capture, enhance, store, and deliver first, second, and third-party customer data efficiently and effectively. Segment successfully delivers on the four key CDP platform benefit claims: 1) Connect – integrating data source and destination platforms, SaaS with true IaaS, and Coding with No-Code options; 2) Govern – users have lots of control over data at the attribute level and worldwide data privacy requirements are made easy to manage; 3) Synthesize – data is kept clean, aggregated, and accessible; 4) Activate – the data will support real time actions, cross-channel events, and advanced analysis and decisioning.

CDP Enhanced 6 of 6

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

On an enterprise level, Segment's out-of-the-box (OOTB) enhanced CDP capabilities allow Marketers, Sales, Customer Service, Compliance Officers, Data Scientists, and Tech Teams to easily manage core CDP requirements and focus on the details that come with data hygiene, data governance, data monitoring and enforcement, and building and applying derivative data sets. With over 50 pre-built source data connectors to capture data and over 350 connectors to data destinations supporting demand-generation applications, data integration is made easy. Segment took it a step further with SQL Traits, a feature in the Personas module that allows users to capture almost any data attribute found anywhere in the enterprise in real time to support analysis, decisioning, personalization, messaging, and process management, thus minimizing the impact on IT and data scientist to access and store data. The Privacy module makes Segment a powerful tool kit for the compliance manager with easy inventory, classification, monitoring, and management of all data attributes. Segment University and a rich library of How-To guides, documentation, and drop in scripts makes Segment easy to use for the technology team and the business users alike.

CDP Stack 3 of 4

- ✔ **Analytics & Reporting**
- ✘ **Model Building & Scoring**
- ✔ **Personalization**
- ✔ **Journey Orchestration**

Twilio is continuing to aggressively build out Segment CDP Stack capabilities and recently added a customer journey orchestration solution but remains focused on providing easy customer personalization and data rule building capabilities in support of applications that drive analytics, customer journey orchestration, and personalized sales and marketing programs. Personalization is defined in Segment's Personas module and data process rules for each event destination are defined and managed in the Protocols module. Simple reporting in support of data management, personas, and journey orchestration is available but the strength of this platform is easy integration with best practices BI and modeling application.

OTHER

The approach Segment takes to customer data begins and ends with personalization. Segment starts with three levels of personalization based on: 1) data source and inherited data attributes, 2) customer behavior and interactions, and 3) machine learning algorithms that predict customer propensities. Supported by an Identities Graph, the Personas & Protocols tool kits make creating customer segments and target audiences for any activation application fast, easy, and straight forward.

SUMMARY

Segment is a RealCDP with an easy-to-use CDP platform that appeals to a broad audience and is widely adopted. Both startups and large corporations alike benefit from a rich set of integration tools including 350 OOTB connectors. Both business users and tech users alike can appreciate the easy-to-understand directions and documentation and the no-code and easy customization coding options. The rule building and data management capabilities turbo charge any company's efforts to personalize messages, processes, and services. Segment delivers best practices CDP data capabilities.

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Twilio Segment Findings

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

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	Supports vendor integration, does not include model building tools or prebuilt models
✔ Personalization	CDP Stack	Meets all requirements
✔ Journey Orchestration	CDP Stack	Meets all requirements

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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

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