

CERTIFICATION PREPARED FOR

**Zeotap**

2024 UPDATE March 31, 2024  
AUDIT COMPLETION July 3, 2023

CONFIDENTIAL



HEREBY GRANTS THIS

# RealCDP CERTIFICATE 2024

PRESENTED TO

**ZEOTAP**

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.

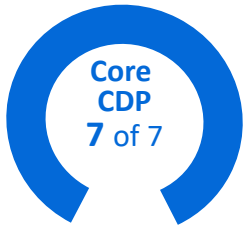
A handwritten signature in black ink that reads 'David M Raab'.

**DAVID RAAB**  
President, CDP Institute



A handwritten signature in black ink that reads 'Vernon Tirey'.

**VERNON TIREY**  
RealCDP Auditor



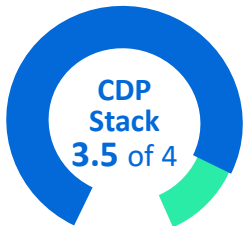
- ✓ Ingest Data
- ✓ Maintain Data
- ✓ Store Historical Data
- ✓ Unified Customer Profile
- ✓ Privacy
- ✓ Share Customer Data
- ✓ Real Time Data Updates

**Zeotap CDP meets all core RealCDP certification requirements.** This SaaS platform hosted in Google Cloud supports B2C companies in a variety of industries. All types of data (except for unstructured) can be ingested in both real time and batch modes using a variety of data transfer techniques. Website tag and cookie management are provided for data capture, but clients can also use their own tag manager if preferred. Fully detailed data is stored in Google Big Query in a client-specific data model; history is maintained for 1-5 years, depending on client need. Unified customer profiles are created using deterministic matching and end users can directly control the prioritization of various IDs in the matching process; anonymous-to-known stitching is standard. Fully detailed, customized profiles can be viewed in the Customer 360 module, including deleted profiles. Profiles can be enhanced with the Calculate Attributes module. Data security and privacy capabilities are robust with many certifications and full GDPR compliance. Consent rules are managed in the Connect module (audience creation and distribution). Data can be shared to any external platform in either batch or real time.



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

**Zeotap CDP meets or exceeds all enhanced RealCDP requirements except for Data Hygiene.** The platform can connect to any channel and Zeotap has over 100 pre-built connectors to facilitate this process. The platform enables all customer messaging channels (email, SMS, apps, display ads, social media, etc.) and operational channels (eCommerce, customer service, CRM, etc.), allowing clients to use pre-existing channel partners to deliver personalized messages while the Zeotap platform enables data unification, targeting and segmentation. Most data sources are supported, many with pre-built, bi-directional connectors. Real time processing for listening, ID resolution, profile updates and sharing supports best practices and can be directly managed and monitored by marketing end-users. Data hygiene includes rules-based data quality and cleansing but postal processing and 3rd party data enhancement are not native. End user training is fully comprehensive and includes, post-implementation training, workshops, bootcamps, online videos/documentation and weekly conference calls.



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

**Zeotap CDP meets all CDP stack requirements except for Analytics & Reporting.** Zeotap comes with built-in dashboards for monitoring data flows and customer metrics, which can be filtered and edited for additional insights. A more robust reporting module leveraging Sisense is in development. Alternatively, clients can easily connect their preferred BI tool to the Google Big Query warehouse. Model building and scoring is native for customer recency, frequency and monetary value (RFM) and customer lifetime value (CLV) and easy to use for non-expert users; models for propensity and churn are in development. Model scores are updated in real time and scores developed externally can be easily imported by end users. Personalization is solid as end users have access to all data via the Connect module, which provides an easy-to-use audience builder featuring boolean logic, drop-down selection and nested query-building for development of highly targeted campaigns. In-message personalization occurs within the marketing channel applications but is fueled by data and insights provided by Zeotap. Journey orchestration is enabled in Symphony, a drag-and-drop journey builder that leverages the audiences created in the Connect module to create multi-touch, multi-channel journeys.

## OTHER

**Zeotap’s interactive RFM modeling capability enables end users to create RFM scores at a segment level.** While most offerings are limited to calculating RFM for all customers at once, Zeotap end users can create RFM insights at a segment (or sub-segment) level, providing highly valuable insights and stronger marketing strategy development.

## SUMMARY

**Zeotap CDP is a RealCDP with particular strengths in real time processing, ID resolution, privacy/consent management and segmentation.** EMEA enterprise marketing teams with a desire to have direct control over data ingestion/integration and targeting/segmentation while maintaining current market channel partnerships will find an excellent fit here. Ease of use and reasonable pricing provide a strong time to value promise for clients.



# Zeotap Findings

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

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	CDP supports some but does not include full ETL and data hygiene functionality
✓ End User Training	CDP Enhancement	Meets all requirements
⚡ Analytics & Reporting	CDP Stack	CDP delivers dashboards and simple reporting but does not include a full BI solution
✓ 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
<b>Ingest Data</b>	Core CDP	Data ingestion and data capture capabilities for all data types
<b>Maintain Data</b>	Core CDP	Maintain and manage all required customer and demand-side data
<b>Store Historical Data</b>	Core CDP	Store all detailed historical and longitudinal data required by Users
<b>Unified Customer Profile</b>	Core CDP	Create and manage unified customer profiles
<b>Privacy</b>	Core CDP	Manage personal identifiers, consent & privacy management, privacy enforcement
<b>Share Customer Data</b>	Core CDP	Distribute and/or syndicate data wherever (and ideally whenever) needed
<b>Real Time Updates</b>	Core CDP	Capture, update, share, and decision data in real time
<b>Channels</b>	CDP Enhancement	CDP supported Channels and available Connectors to capture and distribute data
<b>Data Sources Supported</b>	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
<b>3rd Party Applications</b>	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
<b>Real Time Processing</b>	CDP Enhancement	Enhanced Real-time processing update capabilities (ideally in sub-second speed)
<b>Data Hygiene</b>	CDP Enhancement	Data scrubbing, filtering, standardizing, formatting, and matching capabilities
<b>End User Training</b>	CDP Enhancement	End User training, workshops, documentation, and educational materials
<b>Analytics &amp; Reporting</b>	CDP Stack	Report building and sharing for data, program performance and customer analytics
<b>Model Building &amp; Scoring</b>	CDP Stack	Model development and data scoring in support of targeting and decisioning
<b>Personalization</b>	CDP Stack	Customer Personalization solutions including tools, technologies, and techniques
<b>Journey Orchestration</b>	CDP Stack	Customer Journey Orchestration solutions for multi-touch, multi-channel marketing