

The CDP vs DMP vs CRM Fit Worksheet

Three systems, three jobs, constantly confused. This helps you name the problem you actually have and invest in the right order.

The three, side by side

Two questions separate them: what data, and whose identity. Read across before you decide.

	CRM	CDP	DMP
Core job	Manage known relationships	Unify all customer data	Target ad audiences
Data	Known people	Known and anonymous	Mostly anonymous
Identity	Named individuals	Individual profiles	Segments / groups
Whose	Your customers	Your customers	Everyone, incl. strangers
Used by	People (sales, support)	Systems (marketing)	Advertising teams

Which problem do you actually have?

Score how strongly each describes your situation. The highest score points at the system to consider first.

Relationship problem (CRM)

We need to track known people and our interactions with them, and today it is a mess.

1	2	3	4	5
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Data-unification problem (CDP)

Our customer data is scattered across systems and we cannot see a whole person.

1	2	3	4	5
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Advertising-reach problem (DMP)

We run large-scale paid advertising and need broad audiences beyond our own customers.

1	2	3	4	5
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Honest note on the DMP. It was built on third-party cookies and cross-site tracking, and that ground is eroding under browser and privacy changes. Momentum has moved to first-party data, which is CDP territory. For most businesses the real choice is CRM versus CDP, with the DMP a distant, shrinking third.

State the problem in plain words

If you cannot say it without naming a product category, fix that before buying anything.

The problem we are actually trying to solve

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Sequence, do not stockpile

The order that works: CRM first, because managing known relationships is near-universal. CDP when data fragmentation genuinely hurts, not before. DMP only if large-scale advertising is central to how you grow and you understand its fading foundations. Buying all three because they appeared on one slide is how you get expensive overlapping systems nobody uses.