

The CDP Readiness Worksheet

Most CDP projects fail for the same reason: the platform arrives before anyone decided what it was for. Twenty minutes here will tell you whether you are ready, and what to fix if you are not.

Step 1. What can you not currently answer?

Be specific. 'A single customer view' is a wish. 'Which customers browsed this category last month and did not buy' is a requirement. If you cannot fill in two, you are not ready.

Question 1

Question 2

Question 3

Step 2. Score your readiness

Data is fragmented

Customer information sits in several systems and nobody can join it up today.

1

2

3

4

5

Enough volume and variety

We have the customer numbers and channel mix to make unification worth it.

1

2

3

4

5

Identification moments

We have logins, email clicks, or other moments that tie anonymous activity to a person.

1

2

3

4

5

Clear ownership

Someone will own data quality, someone will own segments, and we have technical resource.

1

2

3

4

5

Activation planned

We know the two or three campaigns or experiences we would run first.

1

2

3

4

5

Reading your score: 20 or above, a CDP is likely worth it. 13 to 19, fix the weakest area before buying, usually ownership or activation. Below 13, a well-run CRM will serve you better for a fraction of the cost.

Step 3. Inventory your customer data

System	What it knows	Identifier

Step 4. Name your first activations

Unified profiles are worth exactly what you do with them.

Activation 1

—

Activation 2

—

Step 5. Questions for the vendor

Ask	Their answer
How does identity matching work, deterministic or probabilistic?	
What happens when two profiles are merged in error? Can we unmerge?	
What do you do with anonymous visitors before they identify?	
How does consent travel with the profile across channels?	
Which integrations are maintained connectors, not just an API?	

One warning. A CDP consolidates data quality, it does not fix it. If three systems hold conflicting details, you will end up with one profile that is confidently wrong. Clean the sources first.