

The CDP Selection Worksheet

Most CDP decisions go wrong on readiness and fit, not on which platform is best. This is how to buy without the regret.

Step 1. Should you buy at all?

The most valuable page here. If this says 'not yet', it may have just saved you a large, regrettable purchase.

Genuinely scattered data

Customer data is split across several systems that do not talk, not just two.

1	2	3	4	5
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Concrete waiting uses

We can name specific things we would do with unified profiles, beyond 'have them'.

1	2	3	4	5
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Capacity to act

We have the people and volume to actually use unified data once it exists.

1	2	3	4	5
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Right problem

This is a data-unification problem, not a CRM, DMP, or simple integration problem.

1	2	3	4	5
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Reading it: All four strong, you are ready to shortlist. Any weak, fix that first. The best CDP decision is sometimes 'not yet': fix foundations, name use cases, build capacity, then buy. Buying first rarely creates the readiness.

Step 2. Define the job before the shortlist

A vague brief guarantees a poor match. Write these down before you look at a single vendor.

The concrete outcomes unified data will let us achieve

Not 'unify our data'. The specific things it enables.

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Our actual data sources, and how each connects

Every system holding customer data that needs joining up.

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Who will use it, and how

Feeding automated systems, or marketers working directly? This shapes 'good'.

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Step 3. Test each platform on what actually differs

CDPs look interchangeable in a demo. Score each shortlisted platform on these, against YOUR data, not a clean demo set.

What actually differs	Platform A	Platform B
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Connects to OUR specific systems		
Identity resolution on OUR messy data		
Built for our kind of user		
Real-time vs batch (matched to our uses)		
How our data gets back OUT		

The regret mistakes to avoid: buying before readiness, choosing on features not fit, underestimating the integration work, ignoring who will use it, and skipping the exit question. None are about bad platforms. They are about good platforms chosen badly, which is the usual way CDP money gets wasted.