

# Webinar: The Future of CDPs

February 25, 2026

# A Different Kind of Firm...

- Martech Advisory and Consulting
- Deep understanding of the MarTech space
- An exclusive Council of top MarTech leaders across many verticals

Ask about RSG Membership and explore a seat on private Council

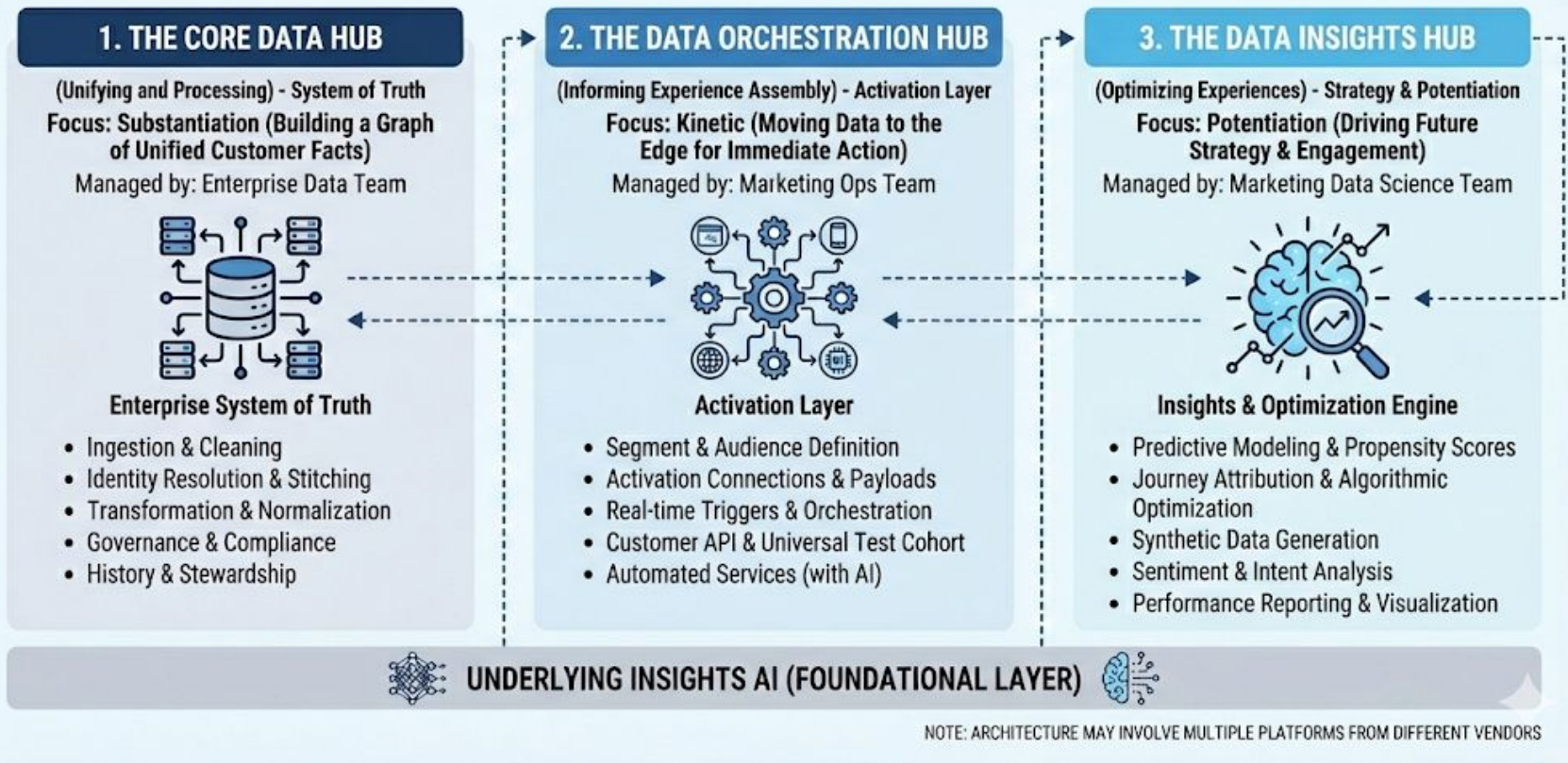
GEEKS	MYSTICS
LOSERS	POSERS

“the mystical quadrant”

INDEPENDENCE FACTORS	REAL STORY GROUP	OTHER FIRMS
CONSULT TO VENDORS?	<b>NO</b>	<b>YES</b>
SPEAK AT VENDOR EVENTS?	<b>NO</b>	<b>YES</b>
ACCEPT EXPENSES & HOSPITALITY FROM VENDORS?	<b>NO</b>	<b>YES</b>
WRITE PAPERS FOR VENDORS?	<b>NO</b>	<b>YES</b>

# Background: Essentials of Customer Data Mgmt

## LOGICAL CUSTOMER DATA ECOSYSTEM: THREE INTEGRATED HUBS



- Historically no uniform definition of "CDP"
- Marketers need three core services
- In a large enterprise they will be run by distinct teams, working closely together
- It's still early days for 2) - Data Orchestration Hub
- Insights AI has a role to play across this spectrum, but mostly 1 & 3. Decisioning AI for Orchestration
- Squishy CDP vendor marketplace has tried to solve all three, but will (mostly!) revert to mean on #2

# CDPs: From Dispersion to Clarity in Six Shifts

01



Packaged CDPs:  
From Database to Decisioning

02



Total Costs:  
Architecture-Driven

03



Composability:  
Hinges on Operating Model

04



AI:  
More at the Foundation Layer

05



Platform Ownership:  
Becomes Federated

06



Technology Selection:  
Capabilities over Categories!

# About You... (Enterprise only)

Which best describes your firm's current CDP situation?

- A** Have licensed a CDP and actively using it
- B** Have licensed but struggling with adoption
- C** Currently evaluating or selecting
- D** Chose not to license a CDP
- E** N/A – I work for a vendor/integrator/consultancy

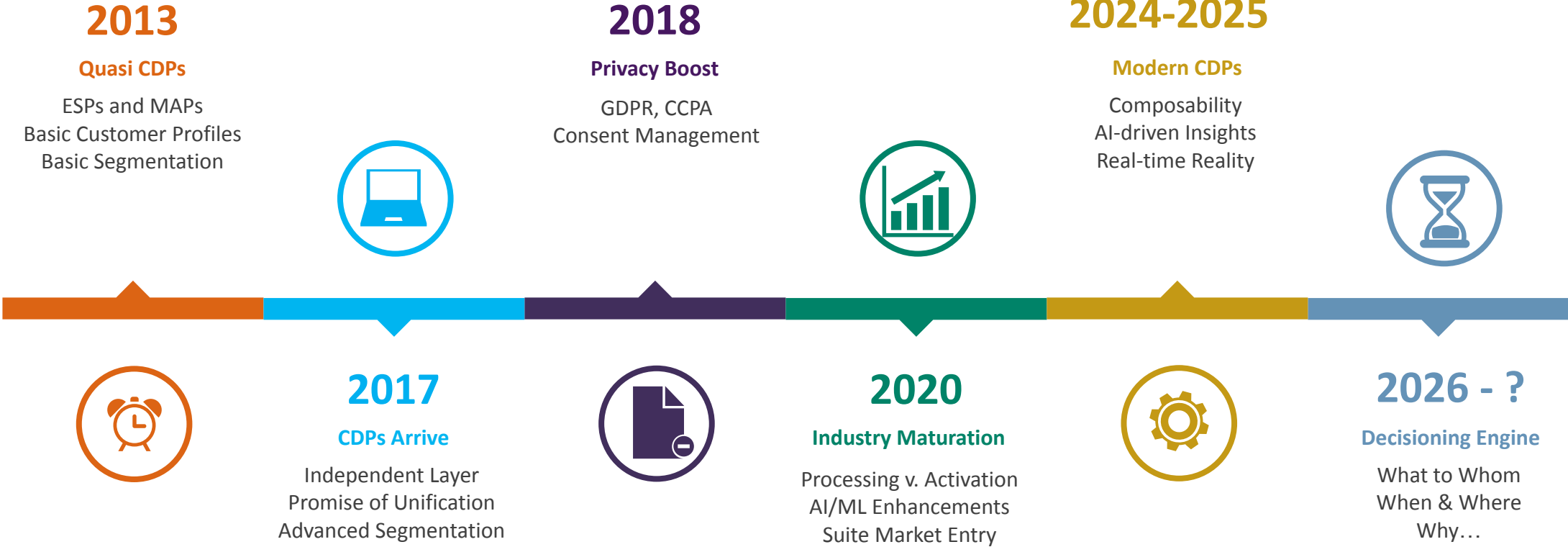


# Theme 1

Packaged CDPs: From Database to Decisioning

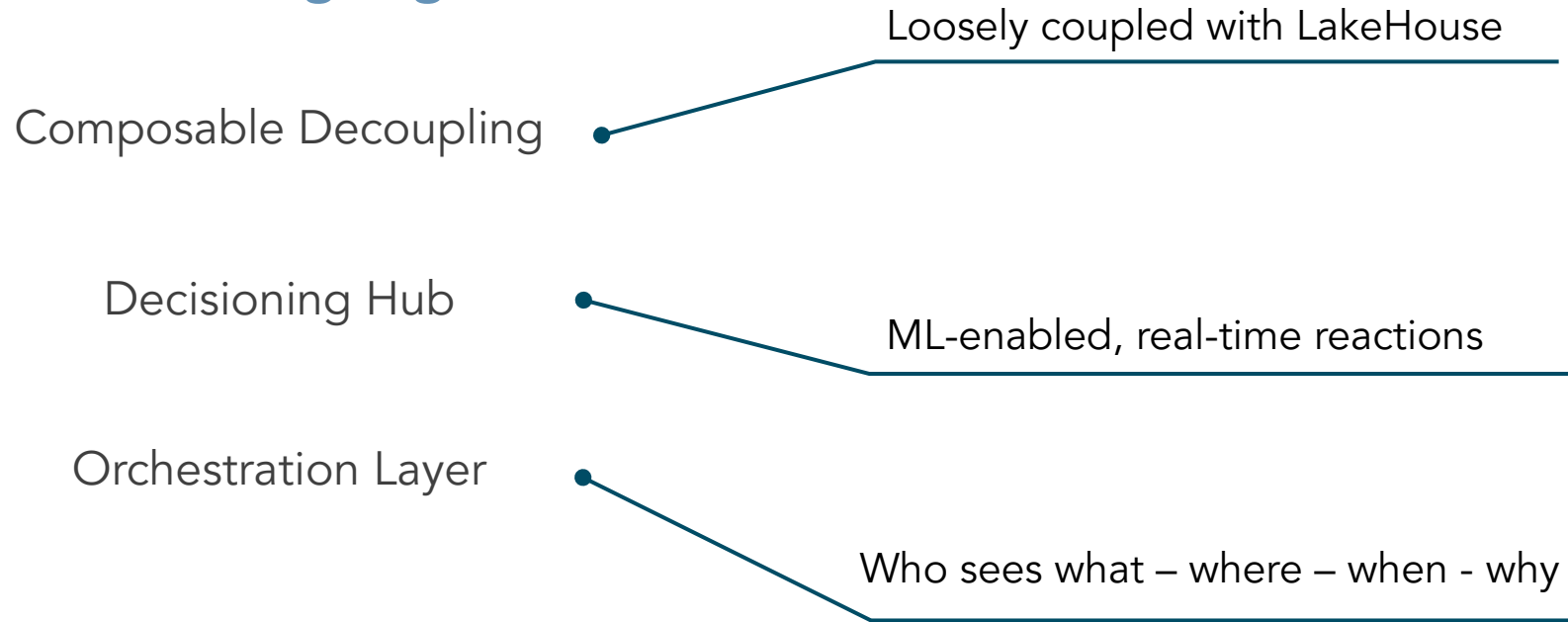


# Past & Future of CDPs



# Overview: Where CDPs Are Going

## 2026 - ? Decisioning Engine





# Theme 2

Total Costs: Architecture-Driven



# Architecture Drives Total Costs



## Optimize Total Cost

Do not optimize for license price alone; optimize for total operating cost



## Cost Drivers

Compute, activation volume, and real-time workloads are primary cost drivers



## Warehouse Designs

Warehouse-centric designs can shift cost upstream rather than remove it



## Model by Scenario

Model cost by scenario: batch, triggered, and real-time separately

RSG has found that hidden costs lie behind many “V1” CDP failures to prove ROI



# Theme 3

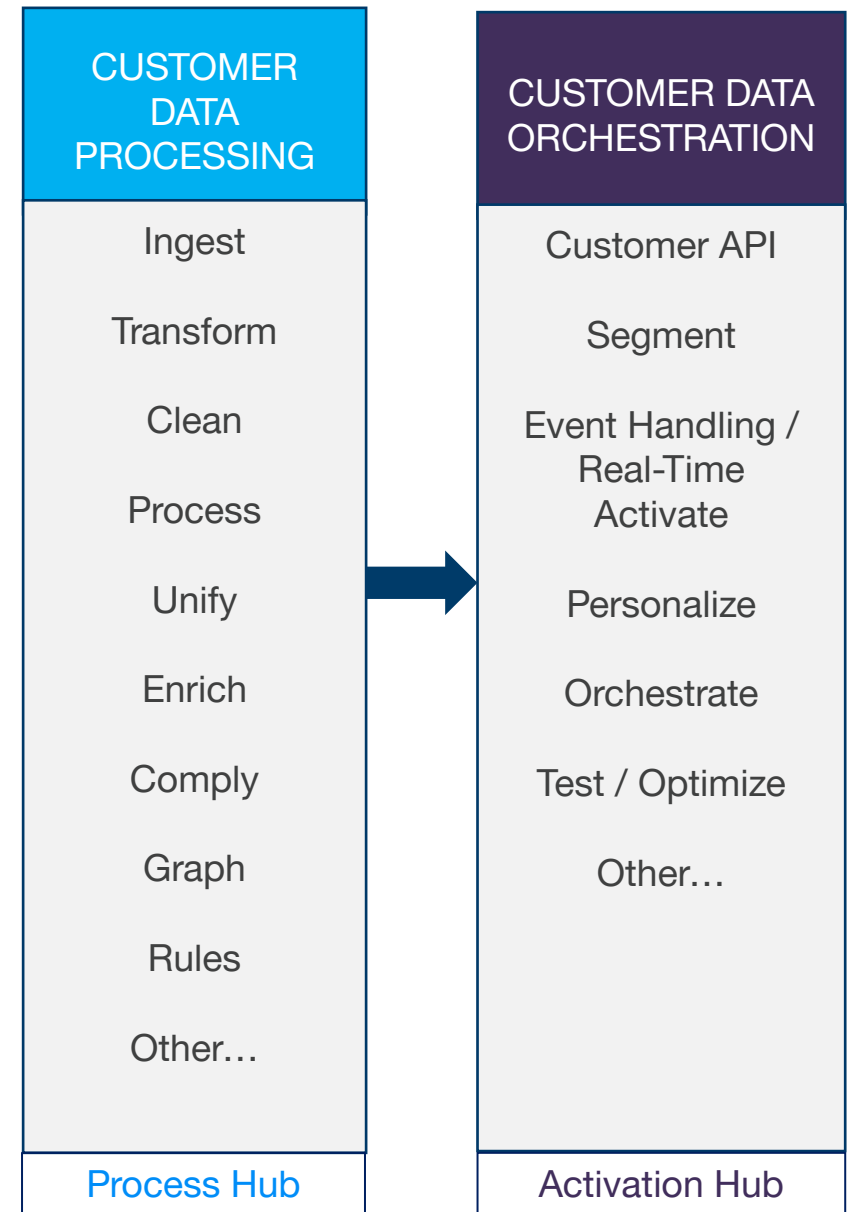
Composability: Hinges on Operating Model



# The Composability Evolution



Nearly all CDPs are composable now...



# A Composable Customer Data Foundation

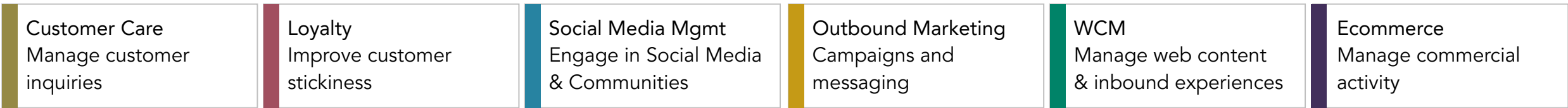
## ENGAGEMENT CHANNELS



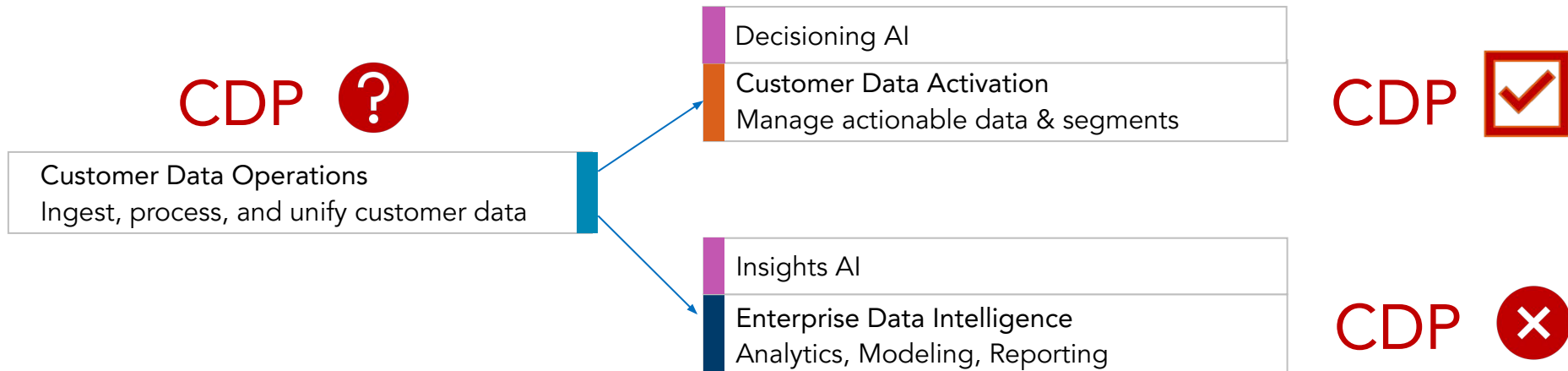
## INTERACTION & DELIVERY ENVIRONMENTS



## ENGAGEMENT SERVICES



## DATA FOUNDATION SERVICES: THREE LOGICAL HUBS





# Theme 4

AI: More at the Foundation Layer

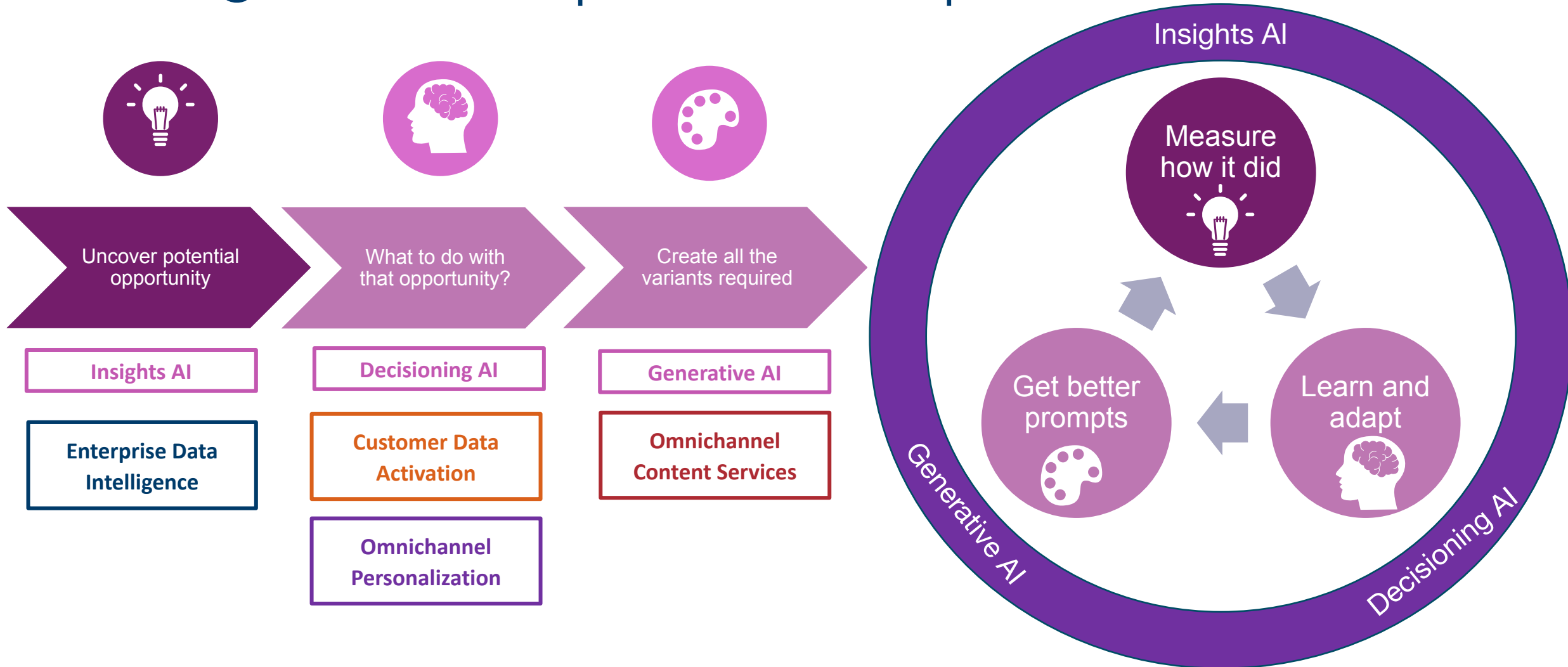


# Where AI Plugs Into the Customer Data Pipeline



- *InsightsAI should reside at core data layer with superset of customer columns*
- *However: AI is valuable at the decisioning layer, not just the data layer*

# Closing the AI Loop at an Enterprise Level

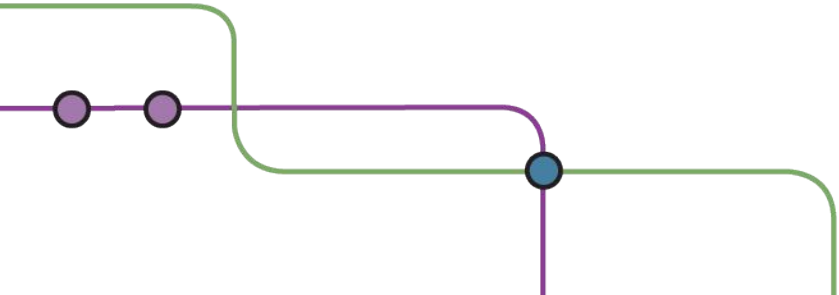


**Beware:** Hallucinations / Content Quality / IPR



# Theme 5

Platform Ownership: Becomes Federated



# From Ownership Anti-Patterns to Federated 2.0

## Common Anti-Patterns

"IT and/or Data owns everything"

Strong governance, but no one activates the data

"Marketing owns everything"

Fast activation, but governance and data quality suffer

"Nobody owns it"

CDP purchased but orphaned across teams

## Federated 2.0

*Shared Accountability with Clear Swim Lanes*

- Each functional team owns what they operate day-to-day
- A cross-functional governance board sets policies and arbitrates conflicts
- Shared KPIs tie data quality to activation outcomes
- Data mesh principles applied: domain ownership with federated governance

# Ownership Becomes Federated



## Data Ops

*Enterprise IT & Data Teams*

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Own ingestion, identity, quality, and governance



## Activation Ops

*Marketing & CX Ops*

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Own audiences, orchestration, and channel execution



## Decisioning

*Marketing, Product & Analytics*

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Shared ownership across teams for decisions



## Governance

*Joint Forum*

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Sets policy, prioritization, and success metrics

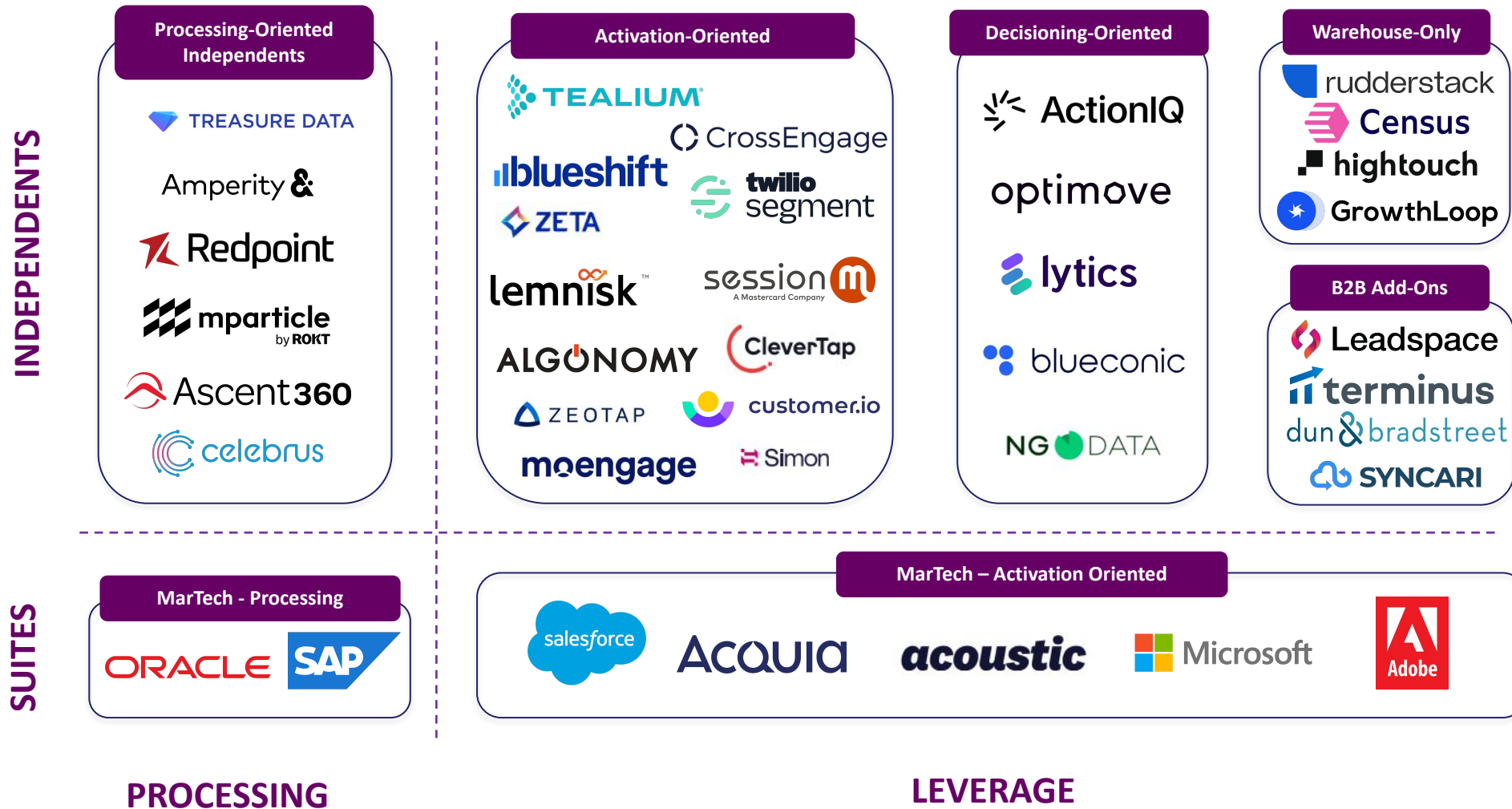


# Theme 6

Technology Selection: Capabilities over Categories



# (Messy) CDP Marketplace, Circa 2026



# Marketplace Outlook: 2026 and Beyond

1

## Suite Vendors Absorb More, But Remain Coupled....

Large suites will continue adding activation capabilities to CDPs, but favor own engagement environments



2

## Independents Specialize Deeper

Surviving independents will double down on decisioning, composability, and/or vertical niches



3

## Warehouse-Native Players May Disrupt

Data cloud vendors (Snowflake, Databricks) could offer CDP-like activation layers natively



4

## Continued Fragmentation

Expect few major M&A moves — lots of scope for smart enterprise decisions



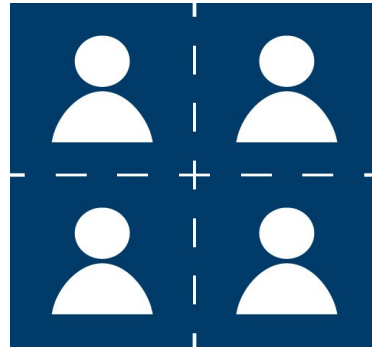
# Ten Potential CDP Business Use Case Categories



Advanced Customer Data Management



Predictive Analytics



Outbound Marketing Campaign Support



Online Personalization & Experience Optimization



Ecommerce Recommendations & Optimization



Omnichannel & Offline Aggregation



Realtime Behavioral Analysis



Household / Channel Support



Digital Advertising Support



Loyalty & Rewards Management

## Key Considerations:

- Not all CDP vendors support all use cases, or support them evenly
- Do you want the CDP platform to **support** or **execute**?

# Key Take-aways

1

Packaged CDPs are evolving from data stores to decisioning platforms

Assumes you have your data house in order...

2

Stop debating the category; focus on capabilities

The answer depends on your operating model

3

Composability is a spectrum — match your operating model

Beware techie solutions to business problems

4

Federated ownership works with clear governance

Cross-functional accountability with shared KPIs

5

Optimize for total operating cost, not license price

Model costs by scenario: batch, triggered, real-time

6

AI matters most at analysis and decisioning layers

Strong Insights AI on full data set is table stakes

7

Marketplace stays fragmented — room for smart choices

Vendor landscape rewards informed selection

# Thank you

Stay in touch!

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Questions?

