

ORACLE

The Complete Guide to
Customer Data Platforms

7 Essential Features That Drive Customer Success



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Introduction

In the previous chapter of *The Complete Guide to Customer Data Platforms*, we explored how businesses face the challenge of managing customer data that's spread across countless touchpoints—whether it's from websites, social media, or in-store visits—and how customer data platforms (CDPs) have emerged as the ultimate solution to unify this scattered data. We explored why CDPs are game-changers that can turn fragmented data into actionable insights to fuel personalized customer experiences.

Now, let's take it a step further. What really makes a CDP effective? Think of it like buying a car—you wouldn't pick one without making sure it has the right engine, safety features, and technology to meet your needs. Choosing a CDP works the same way. It's the features under the hood that determine whether a CDP can actually deliver on its promise.

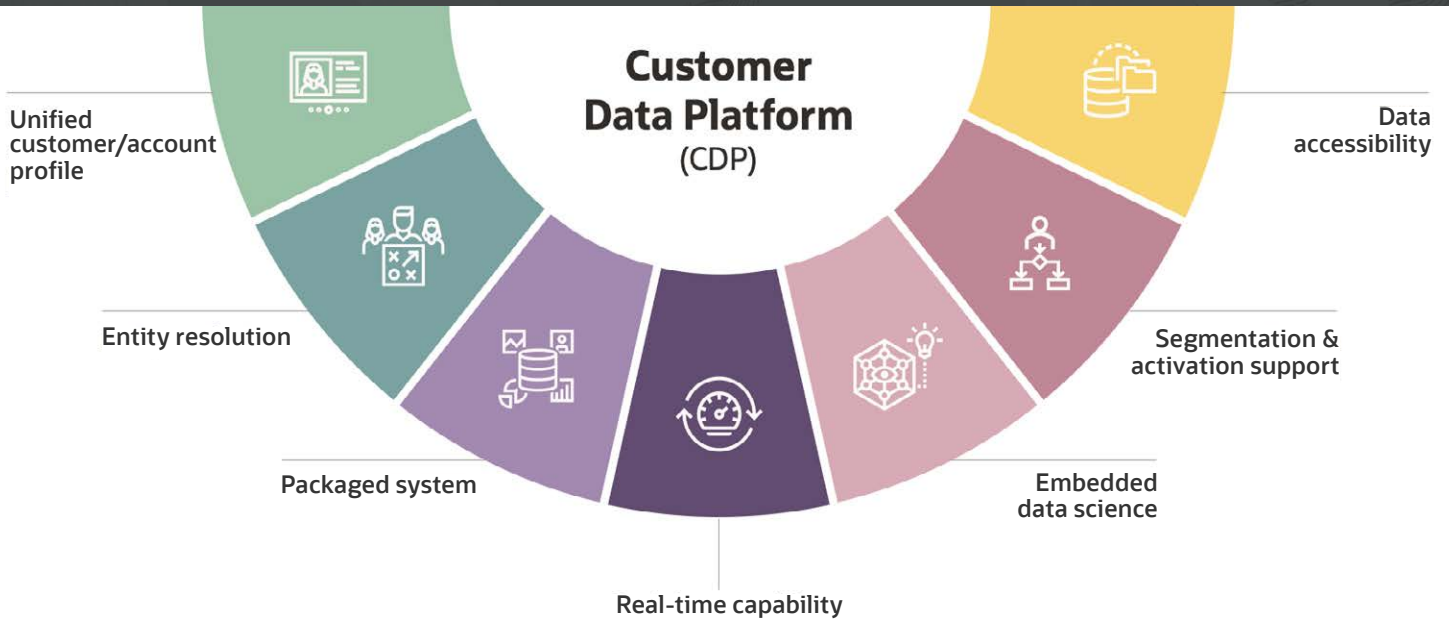
This chapter zooms in on these essential features. We'll cover capabilities such as unifying customer data and resolving identities to using AI for predictions and real-time decision-making. These aren't just technical specs—they're the tools that help businesses like yours build deeper connections with customers, create seamless experiences, and see real results.

So, whether you're just starting to consider how you could use a CDP or refining your approach, this chapter is your guide to what truly matters when evaluating a CDP. Let's break down these key characteristics and see how they set the stage for lasting success.



The essential features of a CDP

Let's review the essential features of a CDP.



1. Unified customer and account information

A CDP creates a comprehensive view of each customer and account by bringing together data from CRM systems; marketing, sales, service, and loyalty platforms; and back-office applications, among other sources.

For B2C businesses, this data unification results in a better understanding of their customers, which enables more personalized interactions, greater marketing effectiveness, and increased customer loyalty. For B2B companies, CDPs that can manage individual accounts and account hierarchies are especially valuable due to the complexity of B2B buying group dynamics. Having greater visibility into these account structures allows marketing and sales teams to identify key decision-makers and influencers and target them more effectively.

In addition, the unified view that CDPs provide makes it easier for sales team to monitor account health and identify opportunities to cross-sell or upsell, thereby deepening relationships and increasing customer value.



2. Entity resolution

Entity resolution (or ID resolution) is the process of identifying and merging duplicate customer records into one unified profile.

A CDP can link customer data from different systems, such as email addresses, names, or phone numbers to a single identity for more accurate targeting and analytics.

For B2B companies, this process is more complex, as it involves resolving data at both the individual and the account level. Different departments or branches of a company might be listed under varying details. A CDP's advanced algorithms merge these fragmented records into a cohesive view of the entire organization and its key decision-makers.

Example

A B2B financial services firm targeting a healthcare organization must grapple with fragmented data from departments such as billing, procurement, and IT, all managed by different stakeholders. A CDP with entity resolution consolidates these data points into a single profile, enabling the financial services marketing team to deliver personalized content while the sales team can gain a clear view of all interactions. This alignment fosters tailored engagement, increasing the chances of building strong relationships and closing



3. A packaged system

One of the defining features of a CDP is that it's a packaged software. Unlike data warehouses or data lakes, which are custom-built by IT teams, a packaged CDP is ready-made and typically managed by business users—often CX teams. This makes it a lot easier to implement, use, and adapt as a business evolves.

A packaged CDP is built to handle essential tasks such as collecting customer data, resolving identities, segmenting audiences, and activating insights across channels—all within one system. Because it's prebuilt, you can get up and running much faster than if you were building a custom solution from scratch. Plus, you won't need to rely entirely on your IT team—vendors and agencies often provide most of the technical support, so your marketing team can take charge without bottlenecks.



Why choose a packaged CDP?

Faster implementation

A packaged CDP can be quickly integrated into your current workflows, saving time and resources.

Adaptability

Packaged software can be easily adjusted as new requirements emerge, helping ensure that the system remains relevant as your business needs evolve.

Empowered business users

While IT supports the initial setup, most of the heavy lifting and maintenance for a packaged CDP is handled by vendors or agencies, freeing your internal team to focus on other priorities.

Reduced complexity

Packaged solutions provide an efficient way to manage your customer data without the technical headaches that come with custom-built systems.

Scalability

With a packaged CDP, your organization can get started quickly and scale your customer data management operations as needed without extensive technical overhead.

By choosing a packaged CDP, your company can avoid the long timelines and resource strain of custom solutions. Instead, you can focus on unlocking the value of your customer data quickly and effectively. After all, it's not just about technology—it's about enabling teams to work smarter and move faster to deliver exceptional customer experiences.





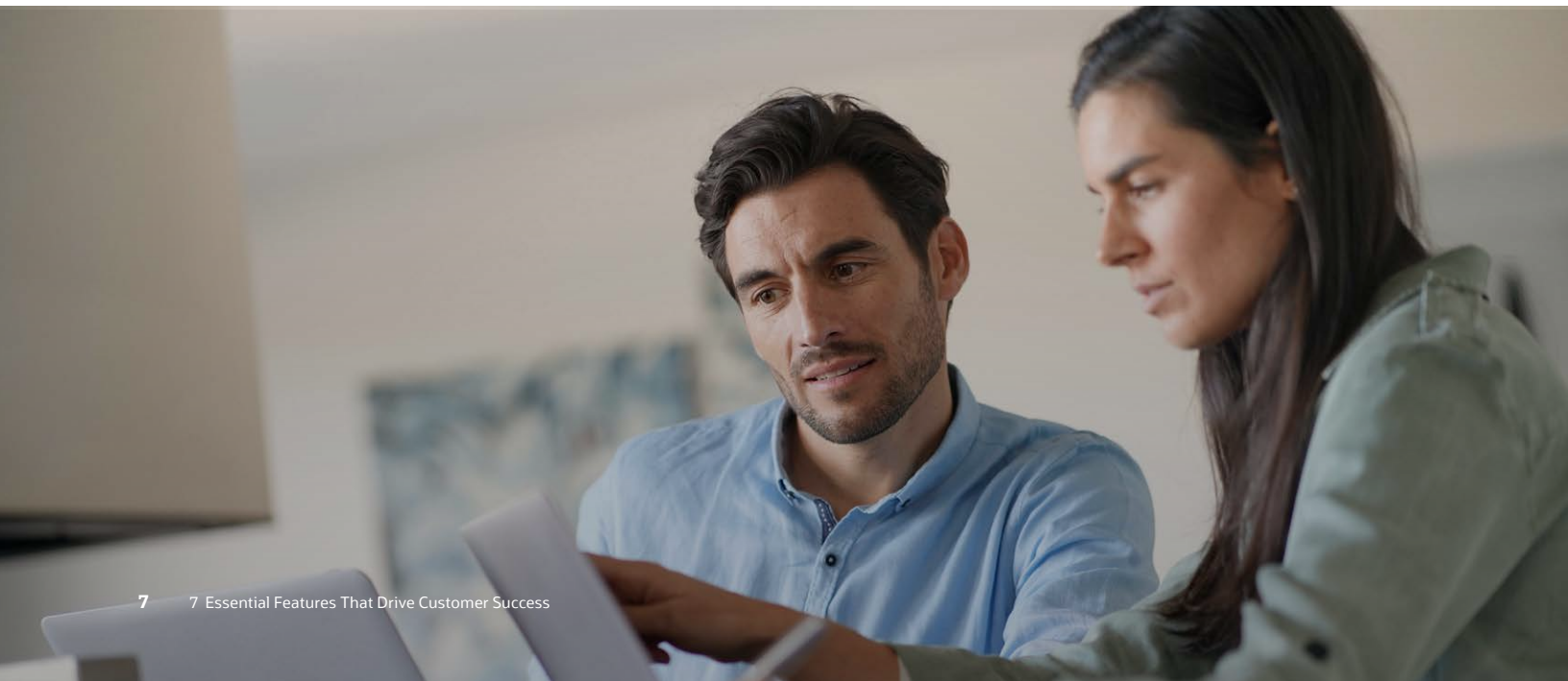
4. Real-time capability

Customers today expect immediate and relevant interactions. This is why real-time capability has become an essential feature for any effective CDP. The ability to process data in real time allows businesses to respond instantly to customer actions, whether by capturing their interest, addressing a concern, or seizing a sales opportunity. Without this capability, businesses risk missing out on crucial engagement moments, leaving potential revenue on the table.

For instance, imagine trying to engage a customer after they've left your website—delaying even a few hours could mean the difference between securing a sale or losing them to a competitor. A CDP with real-time functionality helps ensure that you're always in step with your customers' needs and behaviors, delivering the right message at the right moment.

Example

A retail chain uses a CDP to capture real-time browsing activity on its ecommerce site. When a customer views a product but doesn't make a purchase, the CDP immediately triggers an automated email with a personalized offer or product recommendation, dramatically increasing the likelihood of conversion. This instant response not only keeps the customer engaged, but also reinforces the brand's perceived attentiveness and responsiveness, leading to higher sales and better customer loyalty.





5. Embedded data science

Embedded AI is no longer a luxury—it's a critical requirement. Unlike products that offer AI as an add-on, CDPs with embedded AI seamlessly integrate machine learning and predictive modeling into the platform. This built-in capability eliminates the complexity of external integrations, speeds up insights, and helps teams act on data in real-time without relying on additional tools. Embedded AI empowers businesses to stay agile, uncover actionable trends, and deliver hyper-personalized experiences with precision.

Example

A travel company leverages its CDP's embedded data science to predict the likelihood of customers booking a trip during specific seasons. Using these insights, the marketing team creates targeted campaigns with destination-specific offers, increasing both engagement and revenue while optimizing ad spend.

Check out our wide range of integrations: [Oracle Unity CDP Integrations](#)



6. Segmentation and activation support

Segmentation and activation are where a CDP's true potential comes through. By dividing customers into highly specific groups based on behaviors, demographics, or preferences, businesses can deliver personalized, relevant experiences at scale. Activation helps ensure these segments are engaged across the right channels—email, ads, social media, and beyond.

Example

An automotive company uses its CDP to create segments for potential EV buyers and luxury car enthusiasts. These groups are then targeted with tailored messages—such as a test drive invitation for EVs or exclusive offers on luxury models—delivered via email and social media. This precise targeting not only boosts conversions but also builds stronger brand loyalty.





7. Data accessibility

What makes a CDP truly impactful is its ability to make unified data accessible across the entire organization. A CDP doesn't just store data; it makes comprehensive customer insights readily accessible to various systems, such as marketing platforms, sales tools, and customer support applications. This allows different teams to tap into the same up-to-date insights, enabling real-time actions such as highly personalized campaigns, targeted sales outreach, or enhanced customer service. By bridging the gap between data and action, a CDP can help ensure that every customer interaction is informed, consistent, and highly relevant, driving a more cohesive and effective strategy across all departments.

Example

A software company integrates its CDP with sales, marketing automation, email, social media, and paid advertising channels. The CDP activates unified customer data, allowing the marketing team to launch personalized email campaigns and targeted ads based on recent sales interactions. At the same time, the sales team receives real-time alerts to prioritize leads who have engaged with these campaigns. This seamless data activation across multiple channels can improve collaboration, increase engagement, and boost lead conversion rates, demonstrating the true power of a CDP.

[Read more: Q&A: How Oracle drives more revenue from its B2B customer data](#)



Introducing Oracle Unity CDP

Oracle Fusion Cloud Unity Customer Data Platform, built from the ground up on Oracle Cloud Infrastructure (OCI), unifies data across your enterprise to provide a single, real-time view of your customers or accounts. With Oracle Unity CDP, your organization can seamlessly orchestrate data across all channels, enabling personalized, consistent customer experiences; predictive insights; and increased customer loyalty.



By offering a centralized repository of customer data and metrics, Oracle Unity CDP can align your sales and marketing teams to facilitate precise targeting, cross-selling, and upselling. With real-time insights, Oracle Unity CDP can empower your organization to make data-driven decisions, optimizing every interaction and accelerating revenue growth.

Moreover, Oracle Unity CDP simplifies complex sales processes, breaking down data silos and fostering cross-department collaboration. Its AI-driven analytics, combined with the power and security of OCI, position your organization to lead with innovation and efficiency so you can stay ahead in the market.

Why Oracle Unity CDP?

Highly adaptable

Oracle Unity CDP is designed to scale and adapt to the evolving needs of your business. Whether you're a small company just starting with data management or a large enterprise with complex data requirements, Oracle Unity can grow with you.

Data privacy-centric

With increasing concerns about data privacy, Oracle Unity CDP is built in line with the highest standards of security when it comes to your customer data. It helps businesses comply with global data privacy regulations including the GDPR and CCPA, protecting consumer data rights and building trust with customers.

Insight-driven

Oracle Unity CDP goes beyond data collection by turning data into actionable insights. Leveraging advanced analytics and AI, the platform can help your business understand customer behavior, predict future actions, and make smarter decisions.

Bolstered by a trusted partnership

Backed by Oracle's extensive experience and support, Oracle Unity CDP offers a reliable and robust solution for businesses of all sizes. With Oracle, you're not just getting a tool—you're gaining a partner committed to your long-term success.

AI-enabled

Oracle Unity CDP comes equipped with AI-driven features that automate processes and provide predictive analytics to help your businesses anticipate customer needs and behaviors to drive more proactive and personalized interactions.

Unified across front- and back-office applications

Oracle Unity CDP seamlessly integrates with both front-office applications such as marketing and sales tools, and back-office applications such as inventory management or customer support systems. This facilitates a consistent flow of information across the entire organization.

[Learn more about Oracle Unity CDP](#)

[Read about our out-of-the-box AI/ ML models](#)



Dive deeper into the world of CDPs

We can help you harness the full potential of your customer data by unlocking new levels of customer engagement to fuel your growth.

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