leadspace

Data Unification Platform Checklist

What makes a data unification platform right for your business?

It all comes down to the features it offers. Let's take a look at the top 10 things that should be in your customer data platform.

1. Data/Source-agnostic: You need a platform that'll sync data from any internal (and external) data source.

2. Automation: Will the platform automatically gather data from multiple sources? Will it sync and activate automatically? If it does, it becomes exponentially more useful to your teams.

3. Persona scoring: Having a tool that develops customer profiles at the persona level can be highly valuable for both your marketing and sales teams.

4. Look-alike scoring: Take your data to the next level with predictive models. Know which accounts are best to target based on your top accounts.

☐ **5. Machine learning:** It's better to have a platform that learns as you go so your teams can trust and devote less time to babysitting. Better yet, a platform with machine learning capabilities can make connections that would be difficult for humans to spot at first glance.

☐ **6. Intent scoring:** Put buying signal data to use to find out which leads are actively researching and in-market for your solutions. This way, your salespeople can home in on the targets that are ready to buy.

☐ **7. Channel-agnostic:** You'll need to be able to activate and operationalize your organized data and intelligence across channels for consistent, integrated efforts.

☐ **8. Data cleaning:** Make sure your data is always valid by eliminating outdated information and filling in missing data.

☐ **9. Predictive scoring:** Use parameters and metrics you find essential to track down the best leads and accounts to target (based on your best accounts). Then segment and prioritize them for your sales and marketing teams.

☐ **10. Enterprise-class:** Security, up-time, admin tools, and access are all critical when it comes to business data.

When it comes time to make a final purchasing decision, be sure the CDP you choose does more than unify data. You need actionable insights your teams can use to meet (and exceed) goals.

Want to learn more before you decide? Watch the webinar: CDP: Is it Really Your Single Source of Truth for Sales and Marketing?