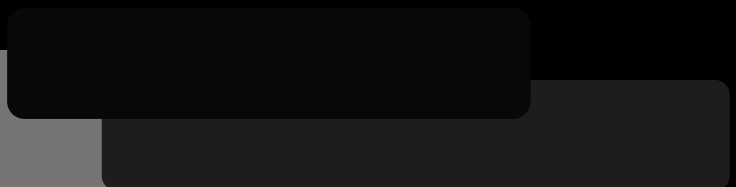


An aqfer White Paper

# SI-READY AND FUTURE-PROOF

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# Customization and Configuration at Scale: A Data Solution for Systems Integrators (SIs) and Managed Service Providers (MSPs)

At this point in our business evolution, no one questions the value of data.

The volumes can be daunting, the complexity is a nightmare, the threat of a breach is ever-present and ensuring compliance is always a challenge, but the value it brings? Priceless, especially when data is done right. But there's the rub. The doing has proven to be as challenging as it can be lucrative for brands, publishers, and technology providers alike.

No one is more aware of this than the CMOs and CDOs (Chief Digital Officers) being tasked with leading transformation initiatives. Despite ever growing budgets and task lists, they continue to report dissatisfaction with their companies' data efforts to date, concern about whether they have the right structures in place, and uncertainty over the tools needed to do the job right. (eMarketer, 2018)

Given that dynamic, CMOs are understandably turning to their Managed Service Providers (MSPs) and System Integrators (SIs) for help. Surprisingly, especially in light of the scope of these lucrative transformation projects, many SIs and MSPs have been reluctant to take up the challenge, however.

If marketing data can open the CMO suite to SIs and MSPs, why aren't more of them jumping into the space?

Understanding why, and why this may all soon change in a big way is the subject of this piece.

## Background

The Data Lake, wherein data is stored in its original format and requirements are defined only after queries come in, is the intellectual successor to the Data Warehouse which accepted only highly structured data. Data Lakes arose in response to the growing need to capture the wide variety of *unstructured* signals users throw off while interacting with brands: ad impressions, web analytics, social mentions, and much, much more.

Their flexibility fueled creativity among developers and offered promise to marketers and non-marketers alike, while creating a perfect opportunity for channel specialists—SIs, MSPs, and others—to play an invaluable role in helping clients find and implement the right solutions.

SIs and MSPs are well positioned to deliver these types of services; they are increasingly partnering (if not merging outright) with data firms, digital agencies and other constituencies to deliver the next generation of digital services. Most have deep existing relationships with CIOs, CTOs, and IT organizations, which they can capitalize upon to engage with CMOs. And managing change, stitching together diverse strands, and deploying repeatable solutions is sort of what SIs and MSPs *do*, right?

And yet... many have not. When asked why, SIs cite several concerns:

Some complain that data lakes are “not there yet,” noting their relative immaturity in areas that are table stakes for conventional databases: enterprise features like ETL, rollback, and recovery.

Others are more enthusiastic but have been unable to design cost-effective data lake projects for their clients. Customizing schemas and configurations for each client's enterprise ecosystem and unwinding deliberate incompatibilities between competing platforms (e.g. Salesforce and Adobe) is expensive, thankless, and time consuming.

Having learned their lessons from the move towards agile and nimble enterprise codebases, still other SIs worry that the extensive customization needed for data lakes will (ironically enough) actually create *more* technical debt for their clients, limiting IT agility in the future.

Finally, for some, it's a case of "once bitten, twice shy." Having tested the waters with clients on Customer Data Platforms (CDPs), a related but much less comprehensive technology that "overpromised and underdelivered" (Forrester Research, 2018), some SIs are holding off until they are sure a solution can truly address all their customers' needs.

**In other words, in this technology-intensive arena, what's missing from faster adoption may be ... the right technology!**

SIs already have their hands full identifying and implementing the right tools, getting deeply immersed in Customer Experience (CX) strategies, methods and goals, and working with clients to determine how the technology can create competitive advantage. Before they jump into marketing data projects with both feet, they're going to need the technology marketplace to deliver the tools they need to offer clients powerful but seamless customization, repeatability, and enterprise caliber reliability.

**This is why the *marketing data platform* is so massively promising!**

Poised to finally give SIs and MSPs what they need is the *Marketing Data Platform or MDP for short*, a new category of data software that brings together the best features of traditional data lakes and CDPs, then evolves beyond both. To understand how it works, let's start by getting a sense of how it differs from both CDPs and traditional Data Lakes.

**Marketing Data Platform (MDP) vs CDP: What's the difference?**

Most enterprises now want data-driven solutions tailored specifically to meet distinct business needs. In a Marketing Data Platform, the data is archived in source form (as permitted under governance guidelines and compliance mandates) and then **refined and harmonized** for consumption by business applications—a big difference.

If every user in the chain has to do the work needed to collate, reinterpret and re-curate the data, then the data lake is just an archive. However, managing the data in such a way as to ensure that it can be consumed in an agile fashion offers a critical competitive advantage.

To some, this might sound a bit like a CDP...and they would have a point. After all, a CDP also features a unified database that can be accessed by other systems.

But most solutions categorized as CDPs don't provide detailed data—rather, they collect what's been pre-processed by vendor reporting systems. They collate data from multiple sources, clean it, merge related points and create a unified customer profile building on structured data.

**This doesn't go far enough to meet the needs of today's marketers.**

# What Are CDPs And Traditional Data Lakes Both Missing?

	Customer Data Platform	Traditional Data Lake	Marketing Data Platform
Fully agnostic and customizable vendor, data and tech platform	○		●
Cost effective storage of large volumes of data for indefinite periods		●	●
Integration of non-PII and PII data while enforcing compliance with privacy regulations in region			●
Access to 360 degree view of customer	○		●
Unlimited ability to capture structured and unstructured data		●	●
Integration and harmonization of event and customer data, including detail and MDM			●
Ability to extract audiences for use by activation applications	○		●
Agile, adaptable schemas and access to source data (a/k/a horizontal data lake)		●	●
Digital data collection, identification and communication (a/k/a "tag management")	○		●
Easy integration of analytics tools, as well as AI/ML technologies		●	●
Full customer journey from top to the bottom of the marketing funnel			●
Customer rather than channel or device centric analytics	○		●
Curation and preparation of data for easy consumption by analytics and activation applications			●
Wide set of Real-Time APIs for data collection and consumption by adtech and martech solutions	○		●

# The Marketing Data Platform

## A perfect option for today's marketers

The Marketing Data Platform is technology designed specifically to enable companies to own all data across all devices, applications and channels. It's infrastructure that helps companies collate, integrate, manage, analyze and optimize data, the greatest asset of the digital era. It functions at the intersection of multiple factors that are vital to this crucial discipline: enhanced personalization leveraging individual characteristics, constant innovation through digital devices and apps, rapid growth in adtech and martech tools, evolving compliance mandates governing data usage, increasingly varied forms of content, and particularly advanced analytics. (And even that's only a partial list.)

A marketing data platform is uniquely suited to benefit an environment in which even a bulging pipeline may not generate a revenue spike.

An optimal marketing data platform tracks the entire customer journey from the top and throughout the buyer's funnel, measures the efficacy of ongoing channels and programs, identifies the prospects engaging most effectively with marketing programs, features an ability to adapt to market changes and business opportunities, and builds a constructive relationship with the sales department. It combines data diversity with accuracy to drive actionable intelligence, customer relationships, accountability, compliance and performance.

That's the promise of digital marketing, and the reality of a marketing data platform. This hybrid approach combines the best aspects of the traditional data lake concept with functional curation of all appropriate data. In the new world of marketing, where a single new data point can transform entire campaigns, that's a perfect cocktail.

## The Marketing Data Platform: Data Lake + CDP + Much More!

### Traditional Data Lake

- Unlimited data capture
- Adaptable Schemas
- Economical Data Storage
- Easy Integration of AI/ML/Analytics

### Customer Data Platform (CDP)

- Real-Time API
- Tag Management
- 360 View of Customer
- Audiences for Activation
- API for data consumption

### Marketing Data Platform (MDP)

- Full customer journey
- Integration of PII and Non-PII
- Customer privacy compliance
- Integration of event, customer, and detail data
- Curation and preparation for analytics consumption

### Customer Data Platforms

### Traditional Data Lake

# C&C For Your Clients

## Customization and Configurability to suit the customer

Analyst firm Gartner reported in 2018 that the vast majority of data lakes will inevitably become obsolete. Reason: They'll be overrun with data assets that turn out to be a liability because they offer no discernible business value, consume significant resources and may fall out of compliance.

This is why the channel factor is so vital. SIs, MSPs and agencies with a diverse clientele are on the front lines—they've absorbed the best practices for each vertical, know the quirks and benefits of data lakes and CDPs, and understand the particular needs of every corporate customer. Best of all, these specialists have the skills and resources needed to customize and configure each solution to suit each implementation.

But that's a problem: Few available data lake solutions—and no marketing data platform offerings at all—have that flexibility. To the contrary, new entrants are designing their data solutions to tighten the grip of marketing cloud suites on brands, rather than provide them with truly agnostic flexible platforms they can customize to suit their current and future needs.

Even when there's a collection of services and APIs specifically to support customer-driven marketing activities, current technologies don't allow the necessary customization and configuration without heavy involvement from the platform vendor.

### Rinse, wash, repeat...

Consider the need for repeatability and customization in software development and maintenance. In this environment, every revision made at the source—for example, to enhance compliance with new mandates overseas (GDPR) or in a particular state (CCPA, with other states coming)—must also be made individually in every node. Having a template eases the process, but manually updating each node is time-consuming and error-prone. With typical business volumes—say, 60 integrations for 20-30 customers—the complexity is considerable.

What's needed here is a version of the 'SIMD' advantage: Single Instruction, Multiple Data, ensuring that one revision in any authorized source can be instantly delivered to every target. It means revising the API to drive instant distribution—and to bring the greatest value, a marketing data platform must have this level of adaptability and configurability.

## Next, there's support and operations.

This is not an area that attracts much attention. . .except when there's a problem. And those problems do happen: One company recently suffered a day-long outage because of an issue with Amazon Web Services that only lasted a few minutes.

The economics of this process are staggering. Imagine an SI supporting 20 data lakes, each with 10 connections and 200 channels. Even with 99.9% availability, there's an average failure three times per month per channel—and with typical costs per engineer, that's \$1,000 per month per channel. That's over \$200,000 in support costs to deal with these problems only (while service credits and unanticipated problems can mount quickly too). This is why SIs know that managing resources for support is vital.

An adaptable, customizable and multi-tenant or scalable infrastructure —the ability to manage from one place—drives down the cost per connection, dramatically improves economies of scale and enables a new level of agility that can greatly benefit the business model. There's never a need to reinvent the wheel.

## And finally, there's security.

The threat of a breach is ever-present, but SI specialists also know that every IT executive must thread the needle between compliance and productivity—protect the data but keep the operation running. The ideal marketing data platform solution strikes the perfect fine balance by restricting access to the data—in essence, keeping it siloed in a multi-tenant process environment—while ensuring that authorized tools can diagnose and remediate problems.

Perhaps best of all, the service provider deploying the marketing data platform doesn't have access to the data, which means it's not a sub processor. So, it doesn't need the approval at every level mandated by current regulations.

That's a big benefit, and will become even bigger as other regulations emerge.



# Integrating the Integrators

## **This is the true promise of an SI-ready marketing data platform: It can change the entire data-driven marketing dynamic.**

A true data-centric marketing architecture brings with it a strong level of agility. It gives channel providers the foundation to customize and configure the implementation, and allows them to react to dynamic business requirements and environments without having to go through an extensive development cycle. The marketing data platform must be accessible to software integrators who want to manage procedures directly within that environment, just as their customers can modify particular routines.

There are other benefits too. The new agility helps SIs lower the level of risk inherent in many projects. Well-architected capabilities for customization and configuration reduce the prospect of unforeseen impact from market shifts. They lead to the creation of a robust system that can handle change and evolution.

So how does this play out—and what are the direct benefits to the SIs and their customers?

Configurability covers a wider range of behaviors and capabilities, and channel players need the ability to widen or otherwise modify those within the system.

For instance, this could involve renaming and reorganizing fields and attributes within the data lake schema, or specifying tolerances for unexpected data from partners.

It could be a fundamental marketing approach, such as a configuration choice that enables clients to select the primary lenses by which they will analyze customer data: user id, cookie or device id, household id, account, hashed email, zip+4 or some other data subject key. This straightforward option offers a significant advantage—and the ability to perform this type of necessary adjustment without vendor involvement is critical to agile deployment

Customization refers to the ability to extend existing capabilities beyond preset boundaries in a way that is still robust, and doesn't affect the overall system flow and behavior. Imagine seamlessly encoding data with the Base32 notation—a significant benefit, for example, in a call center environment where data quality can hinge on accurately distinguishing between different letters and numbers. In a broader sense, it gives SIs the freedom to not only customize standard features via different APIs and tools, but also extend capabilities with each company's business logic or code.

Consider onboarding: When these schemas can be directly updated by integrators, it speeds up an otherwise tedious process. Similarly, client-modified schemas can be repurposed as templates to enable the efficient management of ETL (Extract, Transform, Load) procedures.

These are major advances in a discipline that is fundamentally dynamic. No technology can anticipate every market shift or opportunity; true extensibility with each company's own business logic or custom code (and without constant vendor help) offers a new degree of operating freedom. It's innovation that enables greater innovation.

Tech advances often mix small steps and giant leaps—but they must solve current challenges while offering new capabilities.

A **Marketing Data Platform** that meets business needs and offers control to SIs fits that high standard very nicely.

# System Integrators: The Competitive Advantage

A note from Marc Sabatini, CRO, aqfer



## We know how hard it is for Systems Integrators.

We know the time, cost, skills and effort needed to manage data effectively—get it to offer true business intelligence, ensure compliance, cut costs and generate value. We know how hard it is to even get started.

We designed the aqfer SI-Ready Marketing Data Platform to make all of that work easier. And it's better, and faster, and cheaper.

Here's how: The aqfer SI-Ready Marketing Data Platform offers the opportunity to implement a full-featured marketing data platform environment in just two days.

Typically, this process takes most do-it-yourself System Integrators four to six weeks—time that could be used more productively in other areas. This is a new kind of DIY implementation, because the framework already in our SaaS environment can be fully provisioned and functioning in very little time.

This is not a one-size-fits-all solution: We know each client is different, and every implementation requires customization. The aqfer dashboard comes with an unprecedented ability to adapt the framework to suit different companies, without any involvement from us. This is not minor tweaking—it's true customization designed to meet the particular business needs and opportunities of enterprises of different sizes, in different verticals, and operating in different regions.

Moving forward, the system design produces quantifiably greater cross-efficiencies and can dramatically affect the acceptable cost of managing a marketing data infrastructure. Marketing is not a standalone function—true benefits come from synergy with other disciplines, and the aqfer solution offers a high level of multi-platform operability.

Here's another tangible advantage: The framework is extensible at every layer, granting access to authorized users at any point in the system. Many organizations have data that remains siloed and untouched; the aqfer offering makes it significantly easier for all data to be managed and used appropriately.

## There's more, but here's the technological foundation.

The aqfer SI-Ready Marketing Data Platform uses a serverless cloud processing environment, and comes configured with the enterprise-level capacity needed to host the high-volume data sets some adtech vendors use to build the reports they make accessible to other CDPs through reporting Interfaces and APIs—combined with 1st-party data generated through the advertising exhaust of digital campaigns.

In sum, the aqfer SI-Ready Marketing Data Platform is designed specifically to help SIs speed, scale and better monetize every marketing data framework.

Give it a look.

# CDP, DCMA...and the Marketing data platform

A note from Daniel Jaye, CEO, aqfer



It was late 2015, and I was helping Raymie Stata and Altiscale better understand how companies were leveraging big data to solve common challenges in digital advertising and marketing. As I whiteboarded solution provider profiles in the digital ecosystem (for perhaps the N-hundredth time in 20 years), it struck me that the complexity and angst mostly came from the proliferation of a marketer's data across disparate vendors. . .and that most of these vendors were seeking to justify their own interest in that data.

## Call it a Eureka moment.

That's when Raymie and I conceived of what we call the Data Centric Marketing Architecture (DCMA). This is the idea that with the right set of services and APIs, we could invert the ecosystem and put marketers and their data together, where they belong, at the center of their strategy. This allows them to better leverage data, pursue new strategies with agility, increase efficiency and reduce vendor costs, all while maintaining control in the face of increasing regulation.

Our reference point was simple: the smart phone. This is a device that stays in the customer's control, has a rich set of APIs to support many different services, and allows valuable apps to be quickly built using a few lines of code that leverage platform APIs. Another reference point was a fundamental organizing principle of Big Data, which is to "bring compute to the data." We extended that to "bring apps to the data," which flips the notion of sending my data out to third parties and, let's face it, unknown parties.

We set out to identify and build the essential services and APIs for the foundation of a DCMA, and that's what we call the Marketing Data Platform. It's a scalable and inexpensive way to gather, harmonize and make accessible—to business analytics and activation users—all detailed data of customers and their interactions.

By the time we sold Altiscale to SAP in 2017, we were already passionate about fixing the insanity of the distributed ad/mar-tech industry—and having a more transformative impact on all types of businesses. As we set about constituting the cloud-neutral components of our Marketing Data Platform platform from the services and APIs we had started building as enhancements to the Altiscale solution, the CDP (Customer Data Platform) phenomenon had emerged. We recognized the synergy between core tenets of the CDPs and our approach, and saw how the Marketing Data Platform was the foundation of this vision.

Unlike other companies in the Data Integration as a Service space, the marketing automation suite market, and the enterprise web site tag management arena—who all jumped on the CDP bandwagon—we had built a true platform, with customizability, repeatability, data governance, and real application neutrality embedded in a white label offering.

Industry analysts consistently told us four things:

- We hadn't just relabeled an existing offering that happened to house customer data—we were the closest thing to a true CDP
- This is the only solution that is truly neutral and represents an open platform rather than a proprietary suite
- This is the only solution looking at the entire customer lifecycle, from upper funnel to off-boarding
- This is the only solution that is truly customizable, repeatable, scalable and low-cost.

**That's the Marketing Data Platform. It's custom-made for the current business environment and the perfect platform for the future.**

# Start Making Sense The Marketing Data Platform (MDP)

A note from Raymie Stata, Co-founder, aqfer



I've always looked for new ways to make sense of data. I know it's out there, it's growing in size and complexity, and it has the potential to be more useful than it is. So let's make sense of it

That's why, soon after graduating, I got involved with Altavista, one of the first Internet search engines. A few years later I founded my own company, Stata Laboratories, which built the Bloomba search-based e-mail client and the SAProxy anti-spam filter (pro tip: reducing spam is a great way to make sense of data). I went to Yahoo! after it bought my company, and while there I helped developed a composition model for cloud-hosted serving applications (and won a patent for it). I also got involved in Apache Hadoop, a collection of open-source software utilities that offers a framework for the distributed storage and processing of Big Data. A little later I founded Altiscale, which provided Apache Hadoop-as-a-service, or "big data in the cloud."

Looking back can be fun, but to me it's not particularly interesting. And what's ahead in this journey is the marketing data platform.

In this market, at this time, this is how we make sense of data. Wonder why even a happy sales pipeline leaves the bottom line kind of sad? A data lake is what it is; a marketing data platform makes sense of the data—and the business overall—by tracking the customer journey, making it easy to judge the viability of existing programs, and featuring the agility needed to capitalize on trends and opportunities.

It balances sales with marketing, data integrity with data volume, and performance with compliance.

In an environment  
overrun with data  
complexity and  
unrealized potential,  
the Marketing Data  
Platform makes  
perfect sense.

# Get in Touch

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