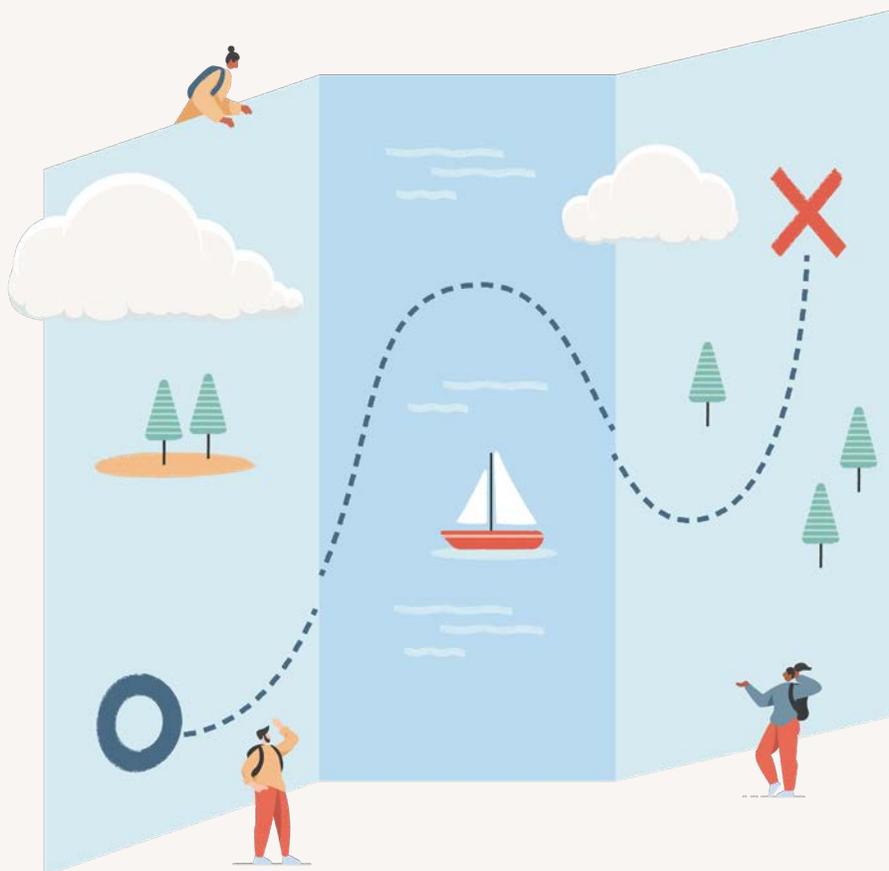


Marketing Analytics Platform Powered by OPMG

The Shared Path to Value for Chief Marketing Officers and Chief Data Officers



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Introducing MAP

While increased spending on analytics has become ubiquitous with modern digital marketing and data management, most companies are still struggling with the sheer size and variety of possible data inputs.

The combination of evolving customer experience (CX), expectations, and a massively changing technology environment demands true transformation.

So how do leaders transform and start getting the promised value from their data and analytics?

Credera and [RAPP](#) teamed up to address this issue. The OPMG-powered Marketing Analytics Platform, or MAP, is a solution for taking companies from data collection to valuable insights. MAPs enable organizations to drive customer engagement, conversion, and lifetime value by building best-of-breed data pipelines that generate and activate real-time customer insights. With a MAP, organizations accelerate the integration, unification, and analysis of their first- and third-party customer data.

A MAP is beneficial in all business functions seeking to aggregate, synthesize, analyze, and take action on their data. This solution allows marketers to begin delivering the

right content through the right channels at the right time to their customers and gives the ability to own the integration, unification, and analysis of their customers' data. The solution also enables data and IT leaders to accelerate data adoption and start using the data housed in their data lakes.

Our intent with this four-part whitepaper is to demystify the complexity around setting up a robust Marketing Analytics Platform and provide a way for companies to not only own their data but also democratize it in a way that allows the business to drive meaningful, insight-based change.

1. In **part one**, we introduce four steps to harness the value of customer data through building a single customer view.
2. In **part two**, we share how [modern cloud-based MAPs enable marketers](#) to accelerate value to deliver differentiated precision marketing.
3. In **part three**, we discuss [incorporating a decisioning engine](#) with the MAP.
4. In **part four**, we share two practical steps for getting started with a MAP.



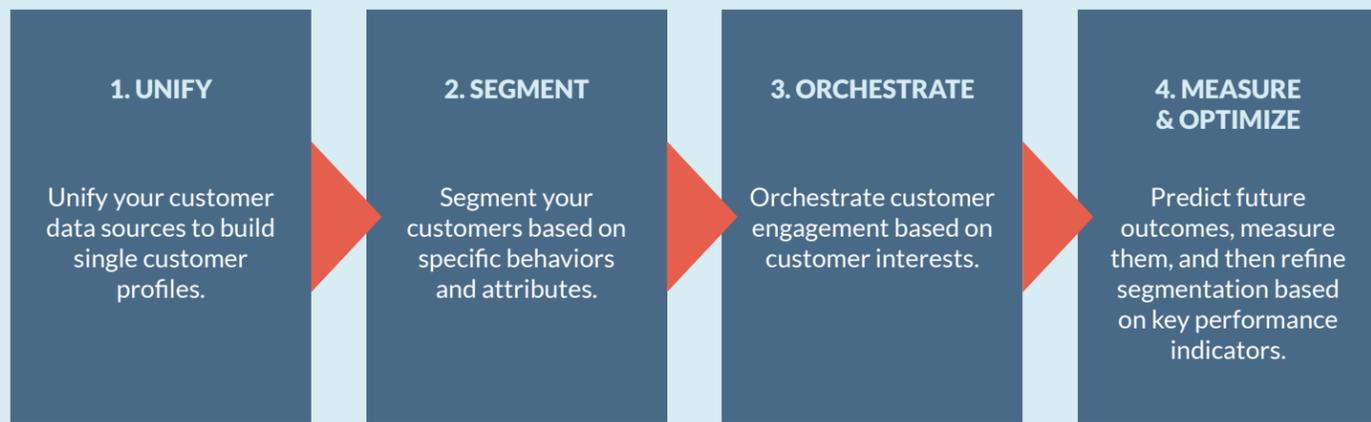


Figure 1: Steps to Creating a Single Customer View

Part 1: Create a Single Customer View

Personalization has become a driving force in the ever-evolving ecommerce ecosystem, with [80% of consumers](#) saying they are more likely to purchase when brands offer personalized experiences. Yet 48% of chief marketing officers believe their customer experience is not good enough, according to a [Marketing Week study](#). While the omnichannel nature of modern customer journeys makes personalizing customer journeys harder than ever, it is critical when 32% of customers say they would stop doing business with a brand they love after only one bad experience, according to a [2018 study](#).

With today's avalanche of omnichannel customer data, garnering actionable insights from fragmented customer experiences can paint only part of the picture, and possibly the wrong one entirely. Assembling a comprehensive, accurate picture requires breaking down data silos and creating a unified single view of the customer.

A single customer view provides marketers with data they can trust, future-proofing their customer data based on robust data quality, real-time insights, and simplified integrations. This allows brands to harness customer data to better understand customer behaviors, identify their

preferences, and provide personalized experiences at every step of their journey.

Creating a single customer view can feel like a daunting task, but can be simplified into a four-part process (see Figure 1).

Step 1: Unify Your Customer Data Sources

Whether you intend it or not, your customers are likely interacting with your brand through more than one, if not all, of the following channels: website, mobile app, social media, advertisements, and physical stores. In fact, a [Harvard Business Review study](#) found that 73% of customers use an omnichannel experience.

To further complicate things, your customers may access these channels through a mobile device, desktop browser, or your point-of-sale (POS) system. Oftentimes, data is housed separately in each of these areas. The first step in building a single view of the customer is unifying these disparate data sources at each step of the customer journey.

A [customer data platform](#) (CDP) is purpose built to serve as a centralized source of persistent data. But loading customer data into a CDP is only half



of the battle, as the data must be standardized and transformed before being integrated. As an example, Tealium provides the ability to not only ingest data from any channel, but also to stitch these data sources into a single view and enable true real-time segmentation and activation.

If the goal is to build a single customer profile for Mary Smith, you need to stitch together the interaction data from your mobile app (mary_smith35), your website (Mary.Smith), and your POS (MS10032044) to create a unique, singular profile. Only once you have data you can trust can you begin to garner insights from the full picture.

By breaking down data silos, you can enable profiles to be built in real time from omnichannel touchpoints. This enables deeper insights and personalized experiences at every step of the customer journey.

Step 2: Micro-Segment Your Customers

After stitching your customer data into a single customer view, you can begin to segment your customers based on specific behaviors and attributes. Unified customer data allows for more accurate, trustworthy, and valuable segmentation which sets the stage for customers to be engaged in ways that are most relevant to them.

This is more than just slotting your customers into preset demographics. By looking at the full customer experience, you can identify new micro-segments based on actual customer behavior and engagement. So instead of noting that Mary Smith is a woman with a recent purchase, you can understand she is a frequent mobile app user who primarily purchases on the website.

There are levels of maturity for segmentation. The segments described above were based on backward-looking models. Mature segmentation, on the other hand, leverages machine learning scoring

models to break segments into micro-segments and derive insights from existing customer attributes to predict future customer behavior (see Figure 2).

Using this approach, you can assign anonymous visitors to an existing customer micro-segment based on their observed behaviors. Once you have placed them in that segment you can provide them with personalized journeys and content. For instance, if someone with a similar profile to Mary Smith enters the website directly from the mobile app, you can predict that they are likely in a "buying" stage journey rather than an "awareness" stage journey based on Mary Smith's conversion tendencies.

Step 3: Orchestrate Customer Experiences With Your MarTech Stack

The real power of a single view of a customer comes in the third step, which is the ability to alter customer engagement based on customer interests. Where traditional marketing applies a one-size-fits-all approach to customer

communication, a unified customer profile enables an adaptable approach so each customer can be presented with the best content in the optimal channel at the opportune time.

This is accomplished with a [next best action approach](#), which activates customer data in your [customer data platform](#) (CDP) through pre-built integrations with the rest of your MarTech ecosystem. First, CDP products like Tealium provide the pre-built integrations that accelerate your time to value and allow for activation in real time. Then the next best action approach applies predictive and prescriptive machine learning algorithms to identify the optimal channel to deliver the optimal message at the optimal time. Think of it as putting your best foot forward with every customer interaction.

Take Mary Smith for instance: Based on her unified customer profile and segment, you know she prefers to browse on the mobile app and purchase on the website. So when a new product launches, your decision engine would trigger a next best action to send her a push notification

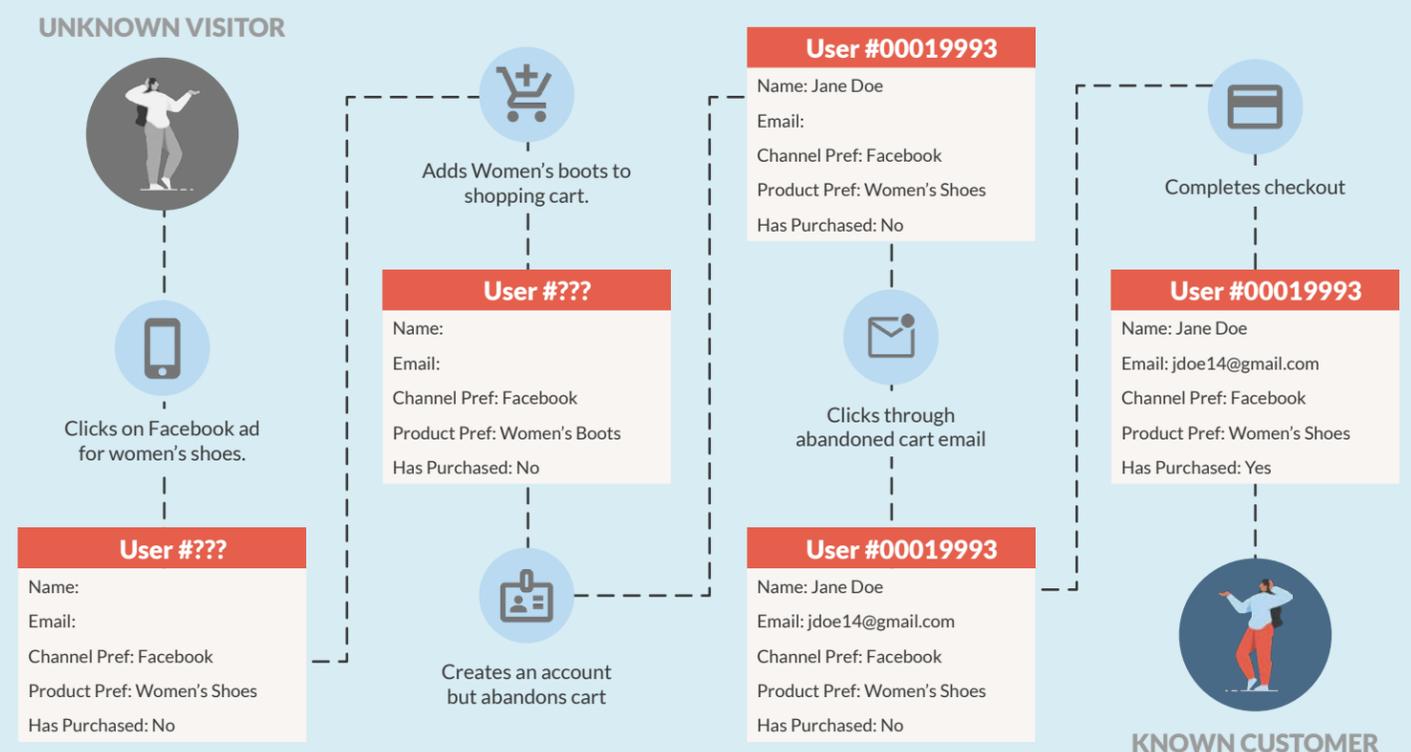


Figure 2: Unified Customer Data

for the product in the mobile app and present her with a discount code to encourage conversion when she enters the website.

Step 4: Measure & Optimize Your Personalization Performance

But orchestration is not the end of the process—the journey for providing unique, personalized customer experiences never truly ends. It is an iterative process focused on predicting future outcomes, measuring them, and then refining segmentation and next best action algorithms to align better to key performance indicators (KPIs).

Amazon Web Services (AWS) can be used to build the robust analytics required for this iterative optimization. Using a CDP such as Tealium to micro-segment your customer data, AWS native services allow you to ingest, model, transform,

and analyze aggregated first- and third-party data. Amazon clean rooms then provide a collaborative environment to blend Amazon customer data with client first-party data that can be activated via Amazon Advertising.

Circling back to Mary Smith, we may measure her conversion rate after entering the website is higher after browsing shoes in the mobile app instead of clothing. We can then optimize her offer by adjusting the discount amount for clothing to incentivize the purchase.

By putting in place a data-driven feedback loop, you can enable the technologies and processes surrounding your single customer view strategy to not only better meet your customer's current needs but also be nimble and adapt to their changing preferences.

Part 2: Utilize a Marketing Analytics Platform

Next, we're outlining how modern cloud data platforms, specifically our Marketing Analytics Platform (MAP), enable marketers to accelerate these four steps and deliver differentiated precision marketing.

To better understand why the MAP may be the key to accelerating your customer-data maturity and enabling precision marketing, we need to examine the evolving data landscape.

Historically, organizations have relied on three types of customer data to drive insights: first-party data, second-party data, and third-party data.

- First-party data is owned data collected directly through an organization's website,

email campaign interactions, customer service calls, product experiences, or other owned interactions.

- Second-party data is another organization's first-party data, collected and shared directly by a partner or supplier.
- Third-party data is aggregated data such as web-browsing history, demographic information, and credit information often collected via third-party cookies or agencies.





The Value of First-Party Data Is Exploding

In today's advertising landscape, the ability to capture and leverage unique first-party data is essential for differentiating customer experiences with precision marketing. Unique first-party data offers organizations the opportunity to unlock unique insights. Organizations can leverage a rich and accessible collection of first-party data to segment customers and deliver experiences based on their brand story and an understanding of each customer's lifelong journey.

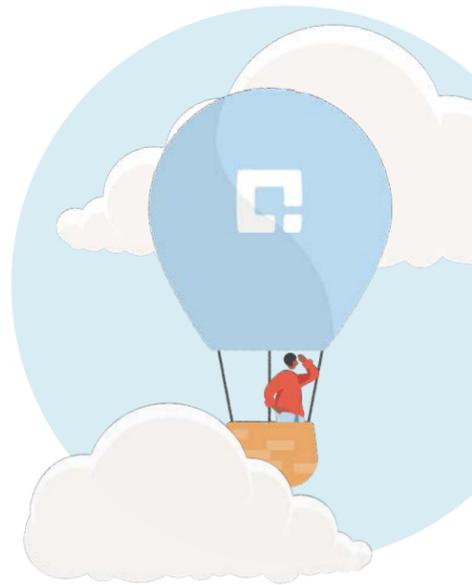
While organizations have traditionally relied on second- and third-party data to build customer segments and marketing campaigns, its availability is rapidly declining. Recently, consumer digital privacy concerns have fueled restrictions on capturing and sharing third-party data: 96% of Apple iOS consumers opt out of ad tracking, Google replaced third-party cookies with [Federated Learning of Cohorts \(FLoC\)](#) technology, and [General Data Protection Regulation \(GDPR\)](#) and [California Consumer Privacy Act \(CCPA\)](#) regulations restricted the sharing of second-party customer data across organizations.

Access to external (i.e. second- and third-party) data is shrinking, so it is essential for organizations to collect first-party data about potential customers in order to deliver more meaningful customer experiences.

Unify First-Party Data in the MAP

Because first-party data is (by definition) unique, commercially-available CDPs are not designed to store and model all types of first-party data collected today. Instead, marketing organizations should extend CDPs with modern cloud engineering to create a marketing data platform and unlock differentiated customer insights.

Marketing Analytics Platforms allow organizations to unify and model all customer data. Customers can



leverage so-called "Customer 360" models available in CDP offerings for standard customer information while extending and integrating these models with cloud data lakes and data warehouses for unique data types. CDPs like [Tealium](#) and data integration providers like [Fivetran](#) simplify this integration with tools and [open-source building blocks](#).

Create Custom Algorithms for Segmentation and Next Best Action

In addition to storing and modeling customer data, cloud-powered Marketing Analytics Platforms offer market-leading tools to train and apply custom algorithms. These algorithms can train on customer behavior over longer time periods to improve customer segmentation and [next best action recommendations](#).

As one option, organizations can apply graphical tools like [Alteryx](#) or [Dataiku](#) to train algorithms with standard click-through or conversion metrics. Organizations with advanced data science teams (in house or through partners) can differentiate further by optimizing algorithms with customer-centric business metrics (e.g., lifetime value, likelihood to refer others, etc.).

Marketing Analytics Platforms also allow organizations to blend their

own first-party data with second-party data available via a [clean room](#) in the second-party data provider's environment.

In one example, a Credera pharmaceutical client leveraged AWS to develop a marketing data platform that blended first-party data with Amazon Advertising data (second-party customer behavior data) without directly sharing data across organizational boundaries. This customer analytics workbench unified the client's first-party data with second-party data from Amazon Advertising and allowed the client to train and apply customer segmentation algorithms in an [Amazon Marketing Cloud \(AMC\)](#) clean room.

This solution allowed the client to learn from second-party data without sharing data directly across organizational boundaries. And, because the marketing data platform was developed with modern DevOps techniques, these algorithms were available to run both inside and outside of the AMC clean room.

Activate Customer Insights in Real Time

Marketing Analytics Platforms leverage the vast computing power of the cloud to unify customer data and tune custom algorithms for segmentation, targeting, and predicting next best action. However, these clever models are only valuable when they are applied to make real-time inferences and influence the customer journey at the right moments.

Therefore, Marketing Analytics Platforms should be developed with modern cloud and data engineering patterns that are optimized for real-time data processing—streaming data architectures built with tools like [Apache Kafka](#), [Amazon Kinesis](#) and [Lambda](#), and/or [Apache Flink](#). These predictions and recommendations from the marketing data platform must be activated via rapid dissemination to downstream channels. [Reverse ETL](#) features in CDPs like Tealium provide the capability to load data quickly into nearly a thousand downstream destinations.

Measure the Customer Journey in Real Time

First-party data enables organizations to measure the customer journey beyond the initial purchase. Our colleagues at RAPP frequently advise clients that the most successful customer journeys can be represented as an infinity loop, which continues from purchase through to passion.

Including first-party experience data from product usage, customer support, and in-house community engagement alongside traditional outreach metrics helps organizations develop a deeper understanding of each customer's unique journeys.

In Summary

As new data privacy restrictions increasingly limit the availability of second-party and third-party data, organizations must lean into the effective collection, unification, modeling, and activation of first-party data. While off-the-shelf CDPs provide functionality to use first-party data, our modern, cloud-based MAP enables organizations to fully utilize all their first-party data to effectively deliver relevant, timely marketing touchpoints throughout the customer journey.



Figure 3: [Affinity Loop, RAPP](#)



“ Marketing Analytics Platforms leverage the vast computing power of the cloud to unify customer data... ”

Part 3: Develop a Decisioning Engine

Companies have made significant investments in collecting and storing large amounts of first-party data routinely used for rear-view mirror reporting and dashboard visualizations, but how can organizations take that wealth of data to the next level? We believe the answer is a marketing analytics platform (MAP).

What Is a Decisioning Engine?

Before diving into how MAPs can improve decisioning, it is important to understand what a decisioning engine is. A decisioning engine is an automation platform that can either execute static rule sets and/or use artificial intelligence (AI) models to predict the next best action for a user based on a combination of first- and third-party data.

Decisioning engines, such as Pega Customer Decision Hub, play an important role in activating on your

data, and they rely heavily on the quality of data and its aggregation, which is where a MAP fits in.

What Is a Marketing Analytics Platform?

A MAP supplements an existing decisioning engine by enriching data with third-party sources and adding propensity data to enhance real-time data modeling capabilities. This allows companies to collect and connect data from a variety of sources and provide cleaner reporting, stronger analysis, and more advanced modeling.

How Does a Marketing Analytics Platform Enable Decisioning Use Cases More Effectively?

One of the many advantages of a marketing analytics platform is that multiple first- and third-party data sources are ingested, cleansed, and transformed into a standard data model and further enriched through sophisticated identity resolution platforms, providing a rich set of data attributes that can be mined for creating powerful propensity models. More importantly, this data is democratized throughout the

enterprise, allowing others to use it as a data source for exploratory data analysis, modeling, and visualization.

To summarize, the key benefit for using a marketing analytics platform to enable a decisioning engine is high quality data ingestion and the ability to create and leverage external machine learning (ML) models that elevate the decisioning engine beyond if-then-style rules.

What Are Some Specific Decisioning Use Cases Where a MAP Can Add Value?

It is helpful to establish high-level use case categories to identify specific opportunities for decisioning. We have outlined some primary use case categories below.

- **Customer acquisition:** Strategically directing a prospective customer along the path to purchase.
- **Customer retention:** Strategically directing a current customer along the path to passion.

- **Pricing and promotions:** Marketing campaigns focused on conversion through strategic communication and discounts.
- **Products:** Marketing campaigns focused on target markets and value propositions.

As you read the following decisioning use cases, look for the conditions that trigger different actions and consider how a MAP could elevate the standard capabilities of a decisioning engine.

Customer acquisition: In the insurance industry, proactively re-solicit quotes not taken with relevant completion offers.

But with a MAP... Enrich the customer profile with third-party data to develop a proprietary model that appends propensity scoring for completion of offer with tailored discounts.

Pricing and promotions: In retail, abandon cart messages or display advertisements are a common example where the intelligence on when to send the reminder and whether to include an additional discount can be developed.

But with a MAP... Enrich customer profiles with third-party data to develop a proprietary model that appends propensity scoring for completion of offer with tailored messaging and discounts.

Pricing and promotions: In the telecommunications industry, deliver personalized discounts to move excess or new inventory for customers with dated devices.

But with a MAP... Leverage inventory data, historical customer account data, and real-time customer behavior data to create a propensity model that can identify the right discount to send to each customer based on their specific plan or device.

Products: In the healthcare industry, reduce hospitalization rates through educational messages promoting covered costs such as well visits, flu shots, cholesterol screenings, etc.

But with a MAP... Enrich the customer profile with additional attributes for the decision engine to determine the best message to be delivered to in-need patients.

Technically, How Is It Done?

The diagram below (see Figure 4) provides a high-level view of a MAP using Amazon Web Services.

What Does This Added Value Look Like in Real Life?

Let's dive into one of the use cases from above. Imagine you are an insurance provider looking to deliver triggered, personalized notification of potential risks and you recognize a

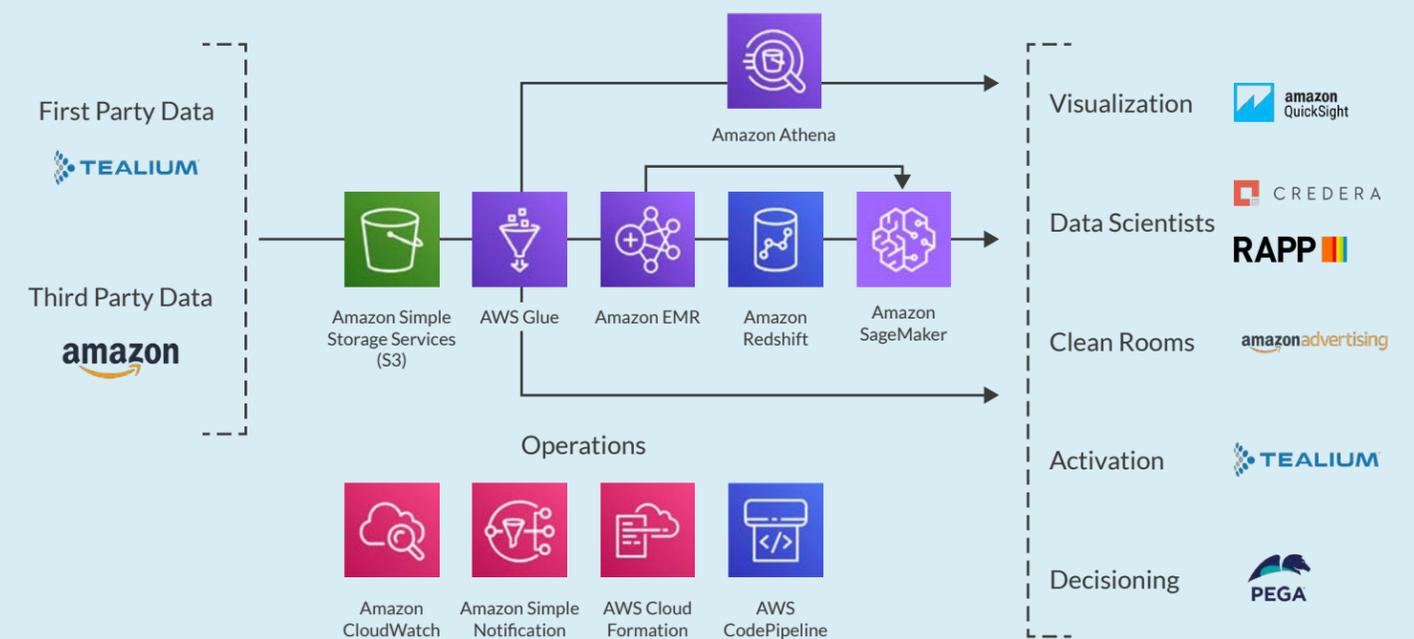


Figure 4: High-level view of a MAP using Amazon Web Services

MAP can enable you to incorporate external weather data to provide real-time relevant communications to at-risk policy holders.

To further explain how a MAP works with a decisioning engine, we will use Pega Customer Decision Hub (CDH) to highlight the integration process with Amazon Web Service analytics platform, as seen above. There are three common integrations we employ with Pega:

1. DATA INTEGRATION

Send data directly to Pega CDH through APIs or data feeds where Pega will consume the data and its models will use it as input for its insights and next best action.

2. MODEL IMPORT

Export custom models created in a MAP using R or Python as a PMML file that can be imported into Pega, which can be used for decision strategies.

3. MODEL INTEGRATION

Employ machine learning as a service where a model can be created within the MAP environment and hosted using a machine learning platform such as Amazon SageMaker.

What Are the Implementation Details for Each Integration Option?

1. DATA INTEGRATION

Returning to our insurance example, you recognize you need to supplement your first-party data with third-party weather data. Pega supports data ingestion through batch files but expects specific formats for data integration. Whether it is CSV or JSON data files, manifest files, or token files, a MAP can automatically create these as a part of a data pipeline.

A MAP can make the process of creating data and manifest files efficient, including enabling automation and anomaly detection. This is crucial because the quality of decisioning provided by the Pega platform is dependent on the quality of data that is fed into the platform and a MAP can ensure high quality data feed with little to no human intervention. When considering the importance of timeliness with inclement weather notifications, trusting the automation of your data and decisioning is vital.

2. MODEL IMPORT: CUSTOM MODELING

Beyond enriching your data, introducing custom models to your Pega Customer Decision Hub through a MAP can ensure your communications to at-risk customers are timely and relevant. In our insurance example, the team could train a custom ML model that predicts the likelihood that a given weather event will cause damage to specific types of property (car, home, boat, etc.) and use this to send targeted alerts. Machine learning models developed using R and Python can be exported as PMML files, with the MLOps components of a MAP helping automate the creation of the PMML artifacts to make the integration seamless. Pega can ingest these custom machine learning models as exports using the Pega Prediction Studio.



The PMML file can then be imported into Pega as Pega Predictive model, which can then be utilized in Decision Strategies. Here is a step-by-step process of how to do this:

1. Log in to Pega Prediction Studio.
2. Import an ML model (in PMML or H2O MOJO format) using Pega Prediction Studio.
3. After importing the model, the expected performance of the model, which is measured as area under curve (AUC), can be set to a value between 50-100.
4. The predictors are mapped automatically to the Pega data model for the predictors having a name match. The other predictor properties will need to be created in Pega before the model can be used. Models can then be used in Pega Decision Strategies using the predictive model shape as shown below.

3. MODEL INTEGRATION: MACHINE LEARNING AS A SERVICE

A more recent iteration of the modeling approach is to expose machine learning models as a service. The advantage to this approach is that the model can respond to inputs in real time and can provide the most up to date decisioning model to the engine at the time the decision is requested. This would enable our insurance model to be independently updated by the data science team, for instance to take advantage of additional data points like the make and model of the car to send targeted messages. By leveraging the Amazon SageMaker machine learning platform as a part of the MAP, Pega can leverage these custom machine learning models using the Pega Prediction Studio.

Pega Predictive model can connect directly to Amazon SageMaker to be utilized in Decision Strategies. Here is a step-by-step process of how to do this:

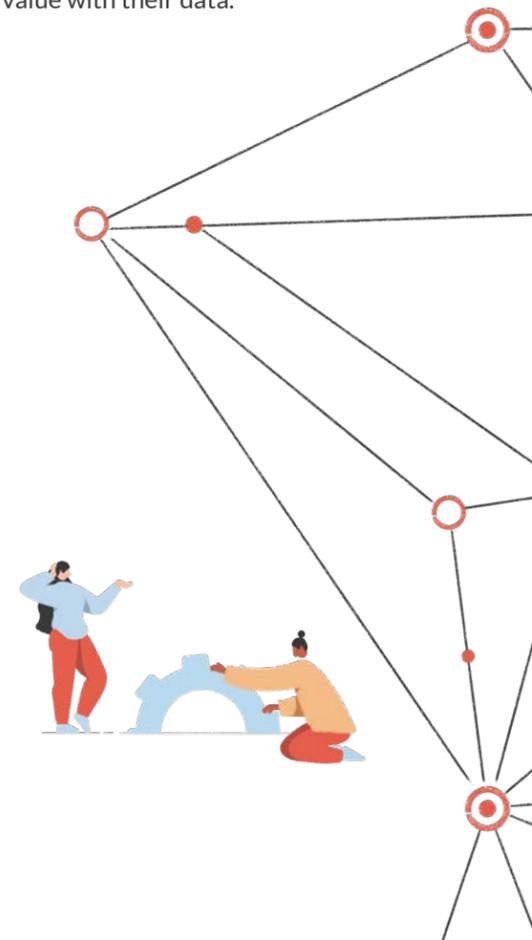
1. Log in to Pega Prediction Studio.
2. Add the authentication profile of the model as a service you are trying to connect.
3. Name the model to complete the connection.

Harnessing the Power of Decision Engines

Decision engines play a crucial role in activating on your data and creating a positive, meaningful experience for your customers. As customer expectations for your company's interactions increase, having confidence that you can deliver tailored experiences in real time is more important than ever.

Using a marketing analytics platform to enrich your data and improve your decision modeling can enable you to anticipate customer needs and proactively engage with them in a meaningful way at every step of their journey. With a combination of Pega's Customer

Decision Hub and Amazon's Web Service analytics platform, you can ensure your platforms are generating value with their data.





Part 4: Getting Practical

Finally, we're sharing two practical steps to get started on this journey.

Step one in the process of setting up a marketing analytics platform is to bring all your data into one place. While this may seem like a significant undertaking, it's easier than you might think. This is where a data lake is really useful and an integral part of the analytics platform.

Step two is establishing a governance foundation that aims at data quality management, schema management and versioning, data definitions, data ownership, and access controls.

STEP 1: UNIFY MARKETING DATA IN ONE PLACE

What Is a Data Lake?

Raw data, both structured and unstructured, in its native form is typically stored in a layer referred to as a data lake. A data lake is used to store raw data that can be used for a multitude of purposes. All the major cloud platforms (AWS, Azure, and Google) have a storage option that works well for data lakes. AWS's Simple Storage Service (S3), Azure's Data Lake Storage or Blob Storage, and GCP's Cloud Storage are ideal for a data lake because of the unlimited scalability at a relatively low cost.

While all the major cloud platforms have services that can automate data pulls into the data lake in addition to platforms such as Fivetran, Stitch, and Singer, our recommendation is to first focus on identifying and validating the data sources and then focusing on automating the data extracts.

There are two advantages to storing data in a data lake:

1. Provides ability to perform an exploratory data analysis (EDA) using self-service tools such as R or Python.
2. Establishes a governance foundation around data quality in downstream systems such as a Data Warehouse or Data Mart.

Let's dive into both of these concepts to describe why configuring a data lake is a key first step in the process of setting up an analytics environment.

Advantages of a Data Lake: Defining EDA

EDA is the process of investigating the dataset to discover patterns, anomalies (outliers), identify quality issues, and test hypotheses and/or form a new hypothesis based on observations. EDA can help us answer questions like:

- What is the average age of our customers?
- What is the income range for our customers?
- Do our customers prefer shopping online versus in-store?
- Does click-through rate differ by ad platforms? Does it vary by ad dimensions or phone OS?
- Does the data support the current customer segments?

And for each of these questions, we can add additional variables to see how it varies with the data. For example, we could also ask, "Does shopping preference between online versus in-store vary by income group or age?"

EDA is also a critical first step in building machine learning (ML)



models by identifying column types and columns with missing or null values, calculating skewness and kurtosis, running bivariate and multivariate analysis, and exploring range and distribution of variables.

STEP 2: ESTABLISH A DATA GOVERNANCE FOUNDATION

Governance on a data lake has several key facets:

1. Documentation of the data flow: Helps identify data source, data owner, frequency of ingestion, method of ingestion (API, SFTP, etc.), and sensitivity of data.
2. Data retention standards: Defines how much history will be kept and how it will be retrieved.
3. Data ingestion standards: Defines how new data sources will be incorporated, including how schemas and data dictionaries will be managed.

4. Data ownership: Establishes a clear chain of custody and is instrumental in enforcing access controls as well as managing data security.

While setting up an analytics platform can seem like a formidable task, each step in the process will unlock business gains along the way. For example, the governance facets we have discussed above will help ensure we can meet both compliance goals (identifying the source and flow of the data through the organization) and quality goals (ability to tie summarized results to source attributes in the raw/native format). Getting data sources ingested into the data lake will also allow for democratization of that data across the enterprise and enable teams to do their own EDA.



Bringing It All Together

Through effective implementations of our custom, cloud-based Marketing Analytics Platform offering, and integrations with downstream channels, we have witnessed organizations increase customer lifetime value by 20% and decrease cost per action by 30%. For organizations looking to accelerate their customer data maturity—unlocking customer insights and enabling precision marketing—our modern, cloud-based Marketing Analytics Platform may be the key.

Interested in learning more about how Credera can help your company deliver personalized omnichannel experiences by driving complex decisioning on next best action from a single customer view through a MAP? Reach out to one of our MarTech experts at findoutmore@credera.com to get the conversation started.

Marketing Analytics Platform Powered by OPMG

OPMG's Marketing Analytics Platform (MAP) is a technology toolkit for marketing teams to unlock

value from their customer data. The toolkit blends enterprise patterns, cloud technology, and off-the-shelf software to unify customer data, segment customers, orchestrate real-time experiences, and measure the customer journey.

This content was created in partnership between RAPP and Credera, sister agencies and part of Omnicom Precision Marketing Group (OPMG). Omnicom Precision Marketing Group aligns Omnicom's global digital, data and CRM capabilities to deliver precisely targeted and meaningful customer experiences at scale



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Our people are our culture. Passionate, diverse, and caring, we work together to build a place where leaders thrive.



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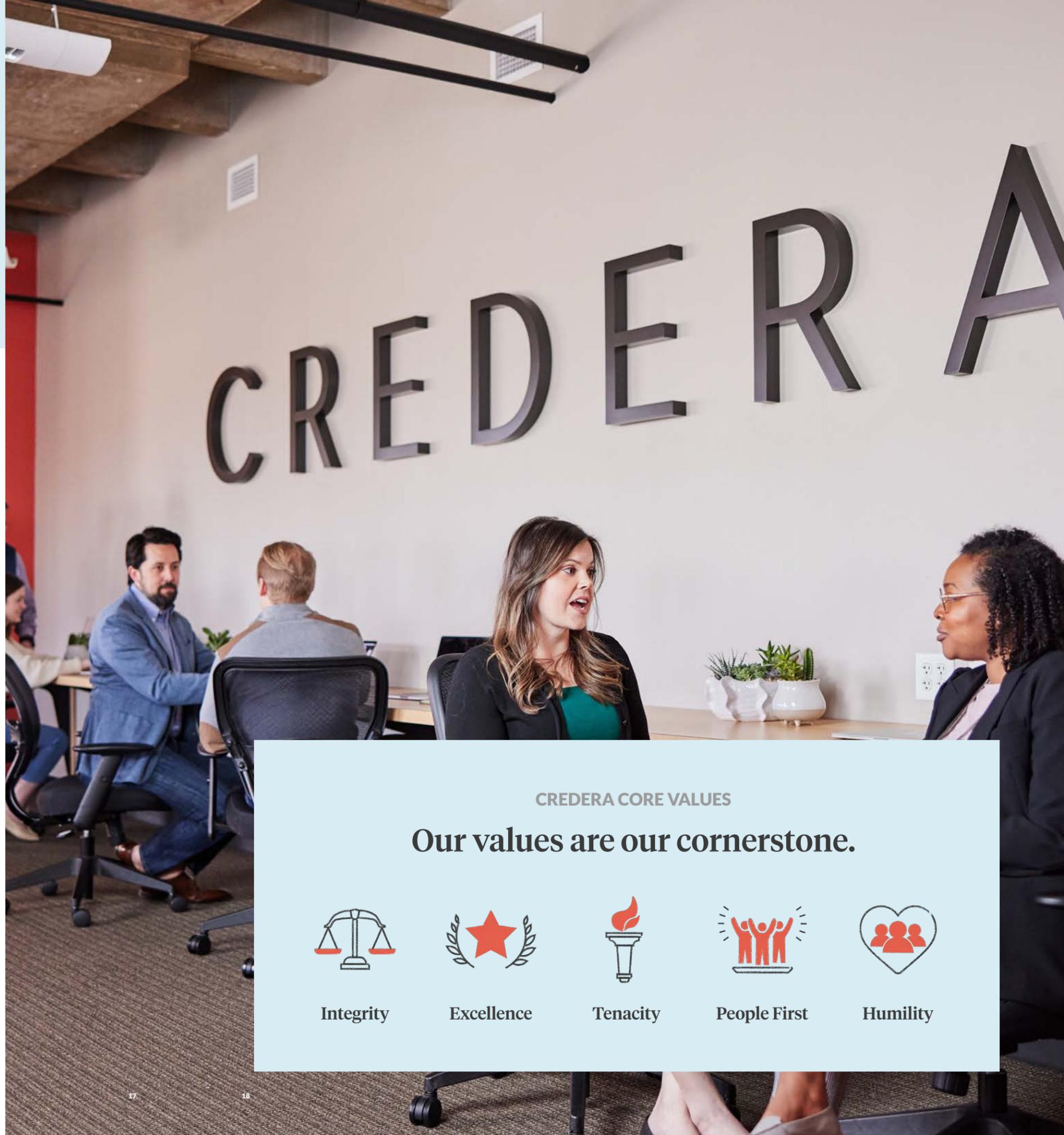
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