GUIDE

Mastering Integration Patterns for Customer Data Activation

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Unlocking Success:
The Critical Role of Integrations in CDP Activation

Customer Data Platforms (CDPs) have evolved from data repositories to robust integration environments, playing a pivotal role in customer data activation.

As businesses navigate the CDP market in search of the perfect solution, they must examine a vendor's integrations for destination platforms. Like the gears in a well-crafted clock, these integrations ensure the CDP harmonizes with the diverse technologies within an organization's tech stack and the destination platforms regularly used for delivering customer experiences.

Every organization's tech stack is unique, and each platform comes with its own distinct terminology, requirements, and limitations.

Mapping the CDP with the nuances of destination platforms is key for the smooth and effective activation of customer data— with reliability and impact.

In this guide, we will explore the core integration patterns with destination platforms provided by Uniphore, designed to cater to the unique requirements of each platform.
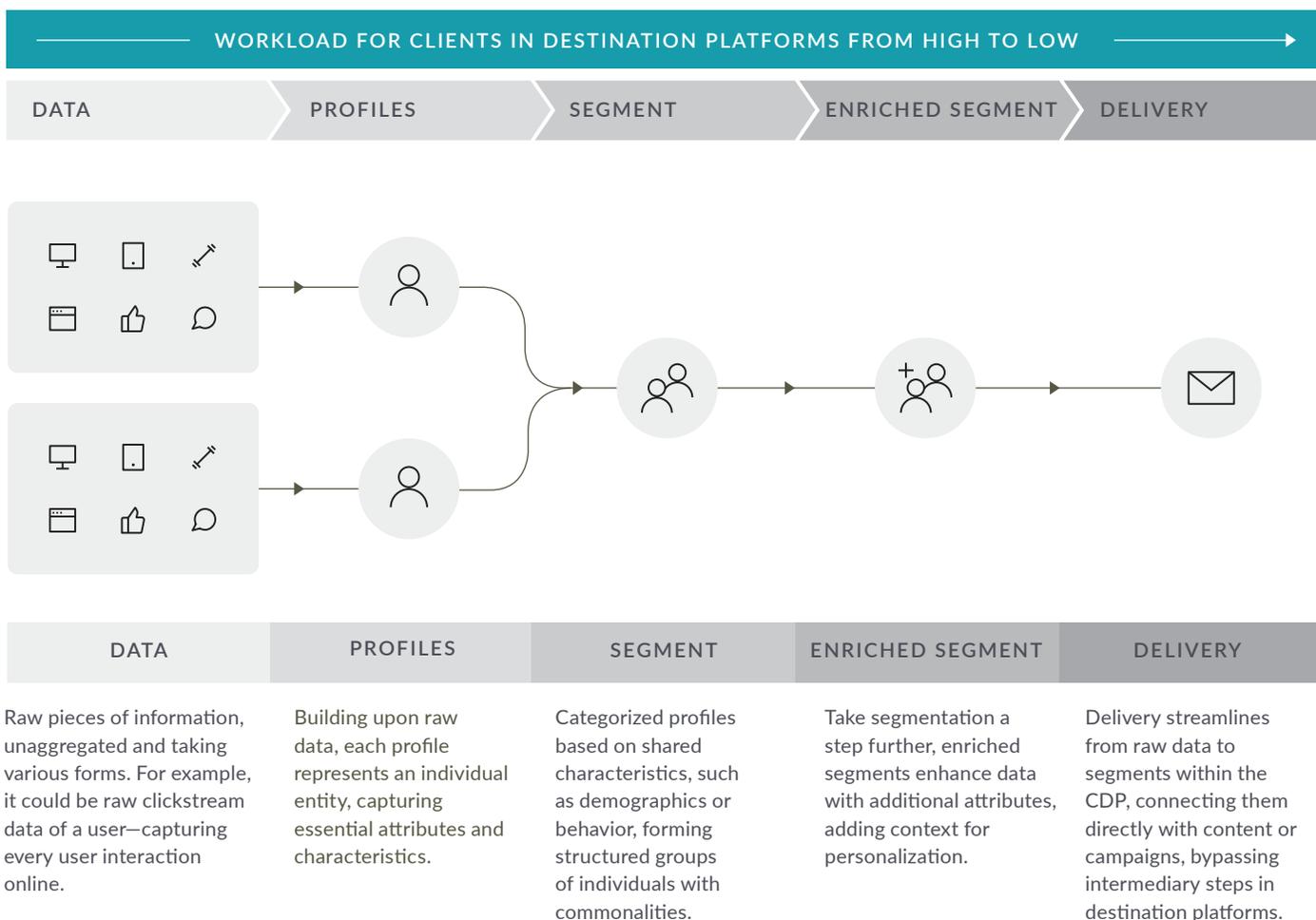
These patterns serve as the roadmap to integration success, ensuring the quality of individual connectors and paving the way for scalable integration development.
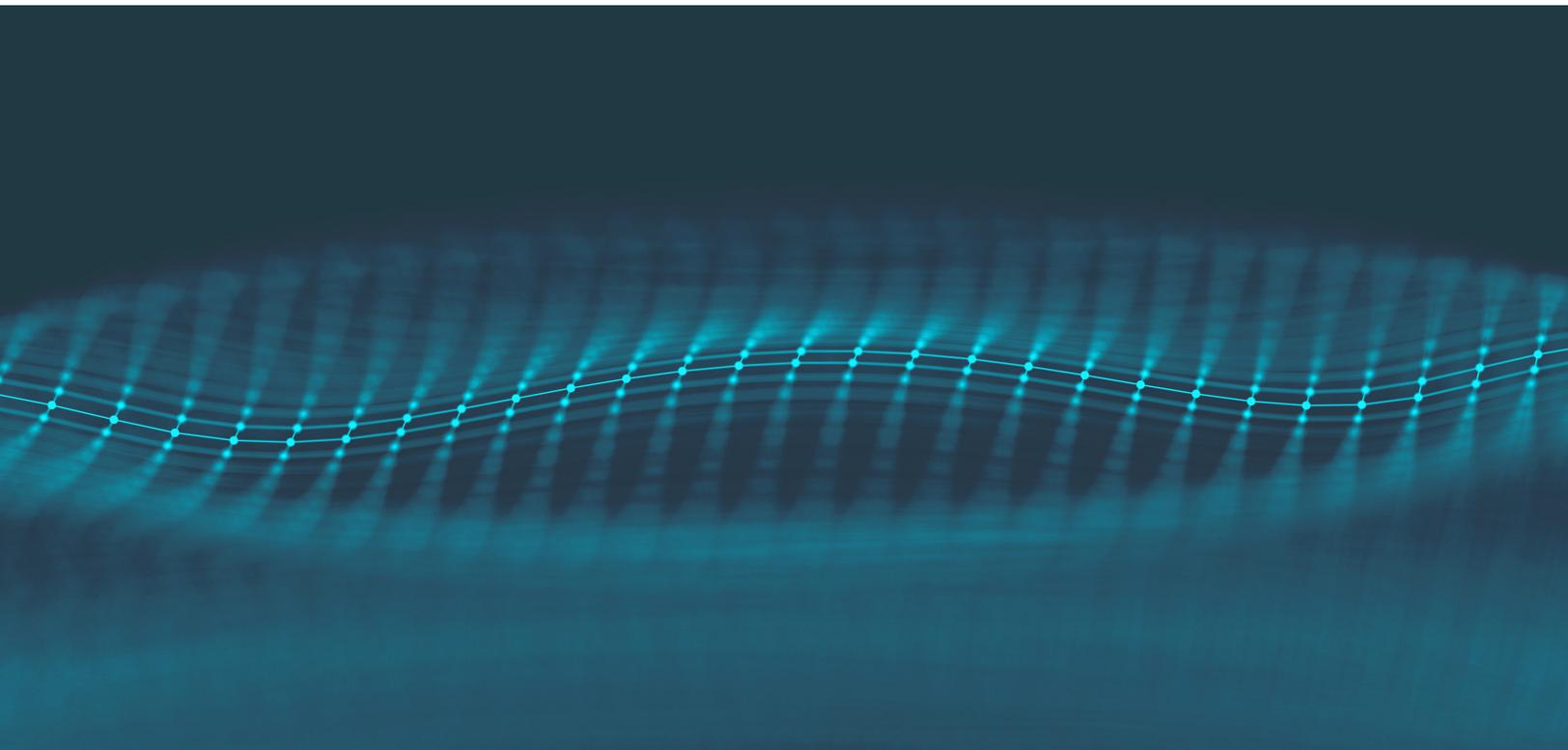
Laying the Foundation:
Key Concepts

Before diving into each integration pattern, we should establish a solid understanding of concepts that form the backbone of seamless data activation.

In this context, we introduce the following five key concepts, which also represent the various points where a CDP can integrate with destination platforms.

WORKLOAD FOR CLIENTS IN DESTINATION PLATFORMS FROM HIGH TO LOW				
DATA	PROFILES	SEGMENT	ENRICHED SEGMENT	DELIVERY

DATA	PROFILES	SEGMENT	ENRICHED SEGMENT	DELIVERY
Raw pieces of information, unaggregated and taking various forms. For example, it could be raw clickstream data of a user—capturing every user interaction online.	Building upon raw data, each profile represents an individual entity, capturing essential attributes and characteristics.	Categorized profiles based on shared characteristics, such as demographics or behavior, forming structured groups of individuals with commonalities.	Take segmentation a step further, enriched segments enhance data with additional attributes, adding context for personalization.	Delivery streamlines from raw data to segments within the CDP, connecting them directly with content or campaigns, bypassing intermediary steps in destination platforms.

As the point of integration moves from Data all the way to Delivery, the workload for clients in destination platforms decreases. This is because, as we get closer to Delivery, Uniphore provides more detailed and refined data to destination platforms, making it easier for the client's team to manage downstream. For example, if Uniphore integrates with the destination platform at the Data level, subsequent steps necessary for customer data activation, such as segmentation, will occur in the destination platform.

Exploring Core Integration Patterns

Before diving into each integration pattern, we should establish a solid understanding of concepts that form the backbone of seamless data activation.

In this context, we introduce the following five key concepts, which also represent the various points where a CDP can integrate with destination platforms.

INTEGRATION PATTERNS FOR OWNED MEDIA[1]			
INTEGRATION CATEGORY	**DESCRIPTION**	**INTEGRATION PATTERN**	**POINT OF INTEGRATION**
ENRICHED SEGMENT	The Enriched Segment integration category facilitates the transmission of audience segments, enriched with contextual information, to destination platforms. It allows brands to leverage Uniphore's robust audience segmentation capability to the fullest, informing the destination platforms with comprehensive insights for personalization.	Native Enriched Segment	✓ Native Enriched Segment
		Standard Enriched Segment	✓ Native Enriched Segment
EVENTS	The Events integration category specializes in managing event-driven interactions, providing patterns that support integration at both the data and delivery levels.	Message Delivery	✓ Delivery
		Event forwarding	✓ Data
PROFILE UPDATES	Featuring the Profile Updates pattern as its core element, this integration category is designed for dynamic user profile management.	Profile Updates	✓ Profiles

[1]Owned Media: Online properties controlled by a brand, like websites, social media, email or SMS, used for direct audience communication

INTEGRATION PATTERNS FOR OWNED MEDIA[2]			
INTEGRATION CATEGORY	**DESCRIPTION**	**INTEGRATION PATTERN**	**POINT OF INTEGRATION**
PAID MEDIA	The Paid Media integration category provides a versatile framework for optimizing targeted paid media strategies across both known and anonymous users.	Paid Media - Known Users	✓ Segment
		Paid Media - Anonymous Users (e.g. Conversions API)	✓ Segment

[2]Paid Media: Any marketing channel a brand pays to place content in front of an audience, such as search advertising or display ads on social media

1. Native Enriched Segment

The Native Enriched Segment integration pattern, executed through an API call, focuses on creating highly targeted customer segments within the destination platform while enriching them with contextual attributes.

While the terminology may vary depending on the destination platform (e.g. Segment, Data Extension, Contact List), the fundamental structure remains consistent—a segment containing customer data and relevant attributes that provide context specific to the use case.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Enriched Segment	Data — Profiles — Segment — **Enriched Segment** — Delivery

BEST FIT SCENARIO

This pattern is widely used to integrate marketing technology platforms, making it easy to share audiences with delivery channels to enable context-rich communications. Natively integrated through API, the nuanced business insights generated by marketers via audience segmentation in ActionIQ are transmitted to destination platforms.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Utilize the targeted customer segments created in Uniphore within the destination platform for personalized communications.	salesforce eloqua

2. Standard Enriched Segment

For vendors without public APIs, the Standard Enriched Segment pattern employs SFTP Data Transfer, securely transmitting data to the vendor's designated location.

Destination platforms manage data pickup, define customized integration logic, and map segments to platform objects.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Enriched Segment	Data — Profiles — Segment — **Enriched Segment** — Delivery

BEST FIT SCENARIO

This pattern is ideal for destination platforms that lack public APIs for data transfer, such as Direct Mail Vendors and most Identity and Data Providers. In contrast to the Native Enriched Segment pattern, where Uniphore manages the integration logic, in this scenario, the destination platform retains control over picking up and processing the file.

While this places the responsibility on the client to build the second part of the integration within the destination platform, it provides flexibility in choosing the platform to integrate with, especially internally built systems.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Facilitate integration with internal reporting systems through SFTP exports.	ALLANT /LiveRamp neustar

3. Message Delivery

The Message Delivery pattern is crafted to directly initiate message sends, such as an email, to recipients within a specific segment.

Within Uniphore, in addition to creating the segment of recipients, users are able to indicate the desired template for the email message that the people in the segment will receive.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Event	Data — Profiles — Segment — Enriched Segment — **Delivery**

BEST FIT SCENARIO

This pattern is common for Email Service Providers (ESPs) and scenarios requiring direct initiation of message sends from Uniphore. It is well-suited for client teams that prefer setting up the end-to-end use case within a single UI, minimizing the work required in the destination platform.

| TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Trigger an email directly from Uniphore.	braze salesforce attentive®

4. Event Forwarding

The Event Forwarding pattern is dedicated to forwarding event data to destination platforms.

The event object, along with attributes like user_id, timestamp, and event properties, is seamlessly sent to the intended destinations.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Event	**Data** — Profiles — Segment — Enriched Segment — Delivery
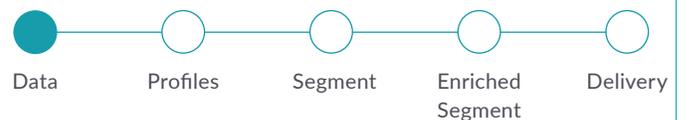
BEST FIT SCENARIO

This pattern is common for use cases reliant on timely event data, such as transactional messages. It is important to note that, as raw data is transmitted, tasks such as segmentation need to be performed within the destination platform, which could potentially contribute to an increased workload for the client.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Real-time forwarding of events to destination platforms for data processing and analysis.	Adobe Campaign attentive® braze

5. Profile Updates

The Profile Updates integration pattern involves the creation and modification of user profile attributes to act as segmentation criteria in the destination platform.

Typically a flag is used to denote whether a person is or isn't part of a segment in ActionIQ. These flags become crucial for triggering activities within the destination platform.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Profile Updates	Data — **Profiles** — Segment — Enriched Segment — Delivery

BEST FIT SCENARIO

By updating profiles effectively based on insights derived in ActionIQ, this pattern is well-suited for destination platforms that operate with user or profile concepts. However, it's worth noting that, in this case, segmentation has to be performed downstream of Uniphore.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Keep profile attributes updated in downstream systems for website personalization.	braze salesforce Adobe Target

6. Paid Media - Known Users

Tailored for platforms with their own customer or profile concept, notably the walled gardens, the Paid Media - Known Users pattern allows ActionIQ to seamlessly create customer segments within those platforms by initiating a matching process by sending Personally Identifiable Information (PII).

Typically, hashed email address or proprietary identifiers are employed to match records exported from ActionIQ with existing profiles on the destination platform side.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Paid Media	Data — Profiles — **Segment** — Enriched Segment — Delivery

BEST FIT SCENARIO

This pattern is a valuable approach for seamlessly synchronizing customer segments within paid media ecosystems. However, it's important to note that due to the nature of walled gardens, there is limited control and visibility into the matching process and results within these environments.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Create paid media suppression audiences based on known users.	Meta Google Ads theTradeDesk

7. Paid Media - Anonymous Users

The Paid Media - Anonymous Users integration pattern facilitates Paid Media advertising targeting individuals not authenticated on the website but recognized in Paid Media channels through their browsers.

INTEGRATION CATEGORY	POINT OF INTEGRATION
Paid Media	Data — Profiles — **Segment** — Enriched Segment — Delivery

BEST FIT SCENARIO

Compatible with various paid media platforms that offer their own Conversions API (CAPI), this pattern is invaluable for enhancing acquisition strategies by extending reach to a broader audience through paid media channels.

Uniphore's Conversion API integrations allow brands to send user events such as completed purchases, to paid media platforms through server-side integration. This facilitates improved measurement and audience optimization, reducing dependence on client-side tracking mechanisms like cookies or pixels.

TYPICAL USE CASE	UNIPHORE INTEGRATION EXAMPLES FOLLOWING THIS PATTERN
Create audiences of anonymous users based on clickstream behavior.	Meta · Google Campaign Manager · LinkedIn

Optimizing Integration for Platforms with Choices:

A Strategic Exercise

As you closely examine destination platforms, you will notice that some provide only one integration pattern, while others offer a range of options.

For those with a single integration offering, choices may seem constrained. However, a nuanced understanding of the available integration pattern becomes critical for making the most of the given scenario.

On the flip side, platforms offering multiple integration patterns bring flexibility to the forefront. In the case of marketing technology platforms that support more than one pattern—Native Enriched Segment and Message Delivery, for example—teams can choose based on their preferred workload within the tool for campaign deployment.

Furthermore, the integration pattern analysis proves invaluable as IT teams evaluate different vendors handling similar jobs-tobe- done. Not all ESPs provide more than one integration pattern or integrate with Uniphore in the same way. While some support integration with Uniphore at the Enriched Segment level, allowing seamless utilization of granular segments built in Uniphore downstream, others require users to manually create user profile attributes post-export from Uniphore to act as segmentation criteria within its platform.

Under these circumstances, choosing the right integration pattern becomes a strategic decision-making process, ensuring alignment with specific goals, technology stacks, and the capabilities of both Uniphore and destination platforms.

Selecting the Right Pattern for Integration Excellence

In the pursuit of integration excellence, there's no room for a one-size-fits-all-approach.

The key lies in recognizing that each integration pattern serves a unique purpose, offering you options to align with your objectives, use cases, and requirements.

At Uniphore, we prioritize integration quality with our diverse set of patterns, providing the flexibility to meet the needs from destination platforms present in your stack.

UNIPHORE

About Uniphore

Uniphore is the Business AI company. Our sovereign, composable, and secure AI platform connects enterprise data, fine-tunes AI models and deploys agentic AI across the enterprise. We empower every worker to boost productivity and help businesses grow faster, operate smarter and reduce costs. Trusted by more than 1,500 businesses globally, and recognized on the Deloitte Fast 500, Uniphore delivers on the promise of AI as a transformative force for business. Learn more about Uniphore's Business AI Cloud and enterprise AI solutions at www.uniphore.com.