ACTIONIQ

ActionIQ Customer Data Platform

Powering Over **3 Trillion Personalized Customer Experiences** Every Year

AMERICAN EAGLE OUTFITTERS · AUTODESK · Albertsons · CDW · CONDÉ NAST · M&T Bank

MICHAEL KORS · pandora · Saks Fifth Avenue · shopify · THE HARTFORD · The New York Times

The ActionIQ Customer Data Platform (CDP) enables enterprise organizations to align people, technology and process to customer data, empowering teams to deliver exceptional customer experiences across marketing, sales and service touchpoints. Technical users can automate ad-hoc data requests while business users, like marketing and servicing teams, can focus on delivering authentic customer experiences built on complete, up-to-the-minute customer data.

The Customer Experience Gap

To compete in today's experience economy, modern organizations are transforming to become customer-centric. But breaking the organizational and technical limitations of the past is challenging. Teams, processes, and technologies are siloed by channels—making it difficult to share information and manage customer journeys across brand touch-points. As a result, the customer experience is disjointed and customer-centricity remains out of reach.

Smart-Hub CDPs at the Center of the CX Transformation

With a single source of customer truth, and a centralized system for managing customer experiences, your marketing, sales and service teams can work out of one hub for customer-centric collaboration. Your entire organization can operate with greater focus and agility to deploy ever-improving experiences that fuel a lasting competitive advantage.

Because the smart-hub CDP is designed to work alongside your existing technology, it can be implemented rapidly with minimal disruption. It also serves as the foundation for ongoing growth as your organization transforms, evolves and scales to become truly customer-centric.

In the ActionIQ Solution Brief, You'll Learn:

- How ActionIQ delivers on all the core requirements of a smart-hub CDP.
- Where ActionIQ sits within your existing systems architecture.
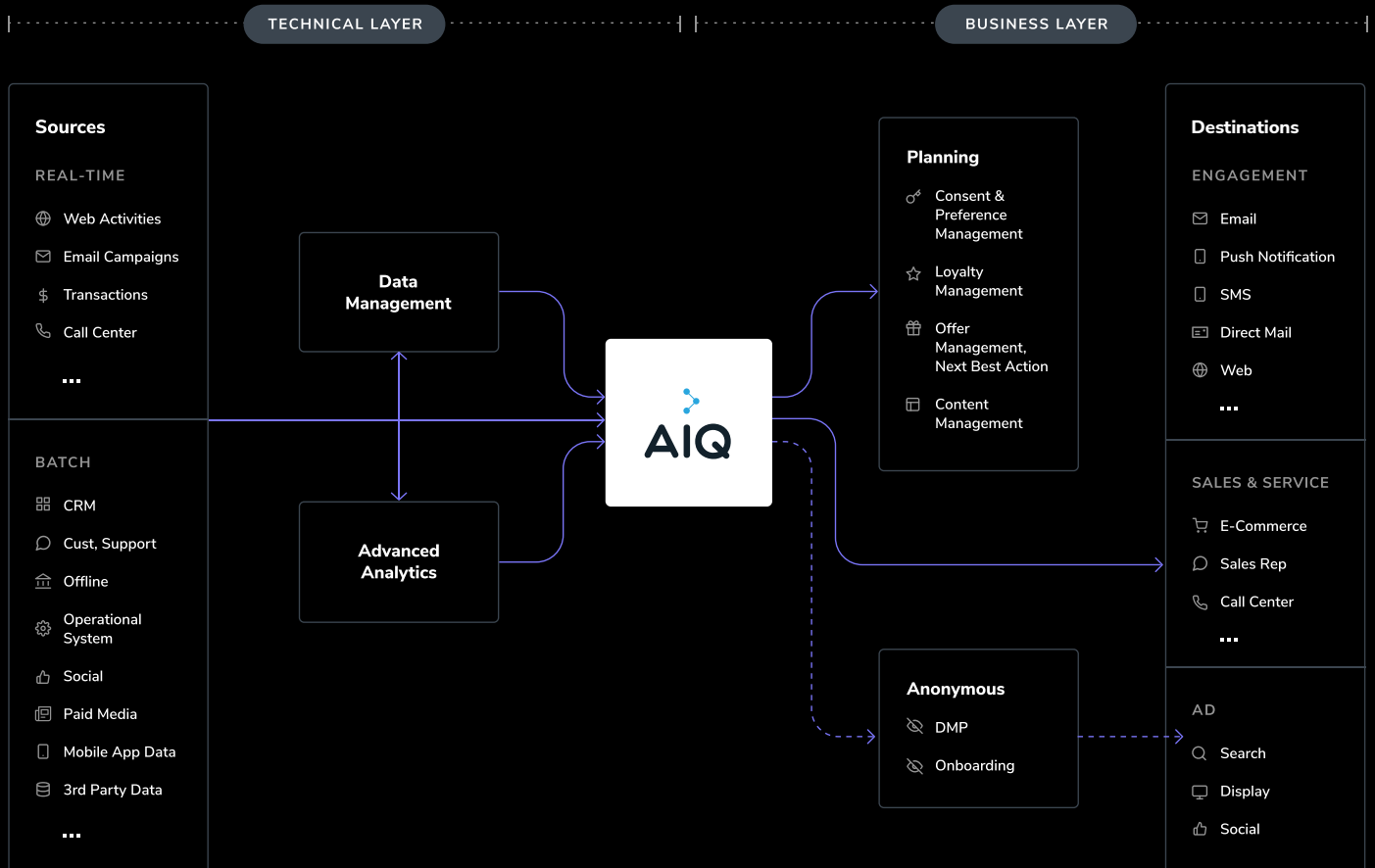- What sets ActionIQ apart from other solutions on the market today.

McKinsey
& Company

"Personalization is impossible if marketers don't have the means to understand the needs of customers on an ongoing basis. Setting up a centralized customer data platform (CDP) to unify paid and owned data from across channels is essential to these efforts."
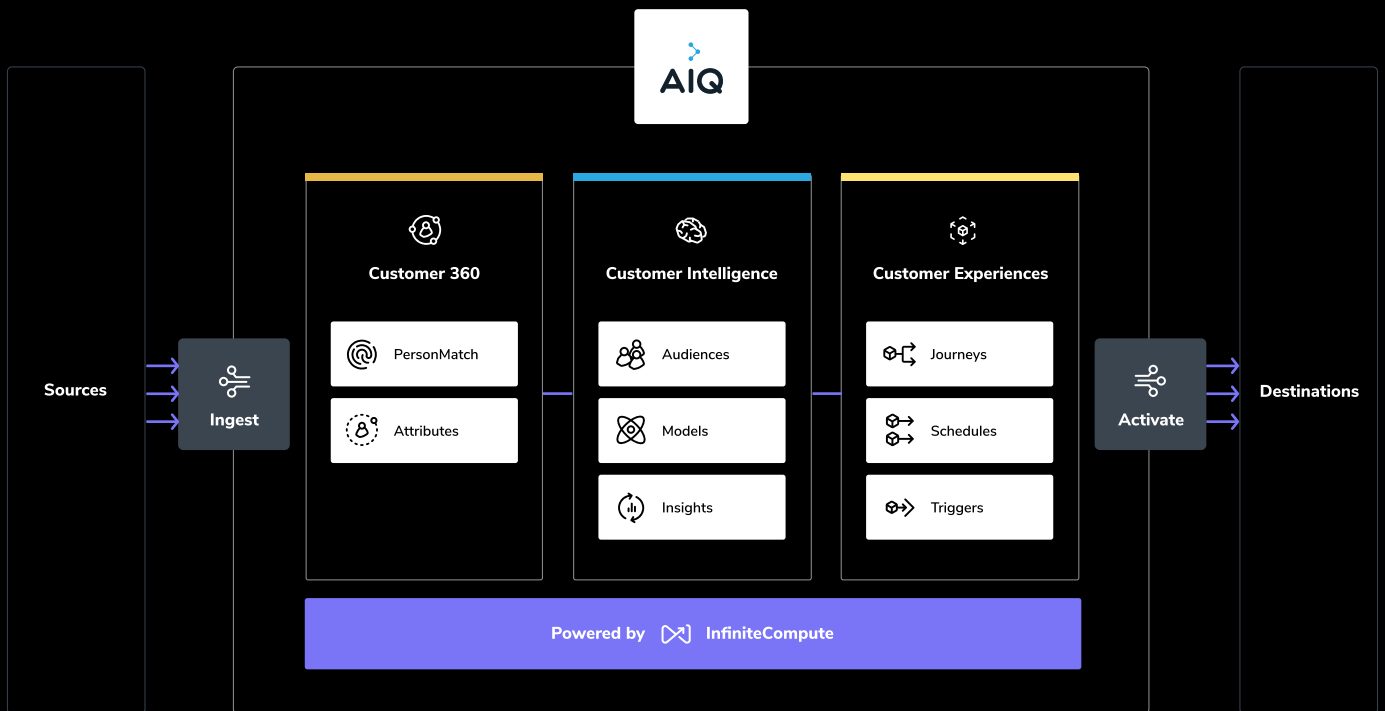(June 2019)

The Modern Customer Experience Stack

The modern CX stack centralizes customer data, intelligence, and experiences into a smart-hub CDP that seamlessly integrates with best-in-breed systems. The smart-hub CDP increases organizational speed and flexibility by:

1. Unifying customer data across all your channels and systems, both online and offline.

2. Providing business users with self-service access to generate customer insights.

3. Orchestrating experiences across every online and offline customer touchpoint.

TECHNICAL LAYER   BUSINESS LAYER

Sources

REAL-TIME
- Web Activities
- Email Campaigns
- $ Transactions
- Call Center
- …

BATCH
- CRM
- Cust, Support
- Offline
- Operational System
- Social
- Paid Media
- Mobile App Data
- 3rd Party Data
- …

Data Management

Advanced Analytics

AIQ

Planning
- Consent & Preference Management
- Loyalty Management
- Offer Management, Next Best Action
- Content Management

Anonymous
- DMP
- Onboarding

Destinations

ENGAGEMENT
- Email
- Push Notification
- SMS
- Direct Mail
- Web
- …

SALES & SERVICE
- E-Commerce
- Sales Rep
- Call Center
- …

AD
- Search
- Display
- Social

The ActionIQ Platform

Ingest

Ingest data as-is from the source, without having to transform to a predefined schema.

BENEFITS

Flexibility

Analyze and activate new customer data sets without having to make yet another IT request.

Speed

Ingest data, then decide how to use it. Eliminate months of up-front scoping and engineering work.

Trust

Reduce data silos and latency to improve data accuracy and customer outcomes.

Sources Examples

- Web Activities
- Email Campaigns
- Transactions
- Call Center
- CRM
- Cust. Support
- Offline
- Operational System
- Social
- Paid Media
- Mobile App Data
- 3rd Party Data

FORRESTER®

"The speed and simplicity of ingesting new data sources was a standout feature to the interviewed organizations. Previous solutions often spent multiple hours ingesting and orchestrating data, a task that took seconds to minutes with ActionIQ."
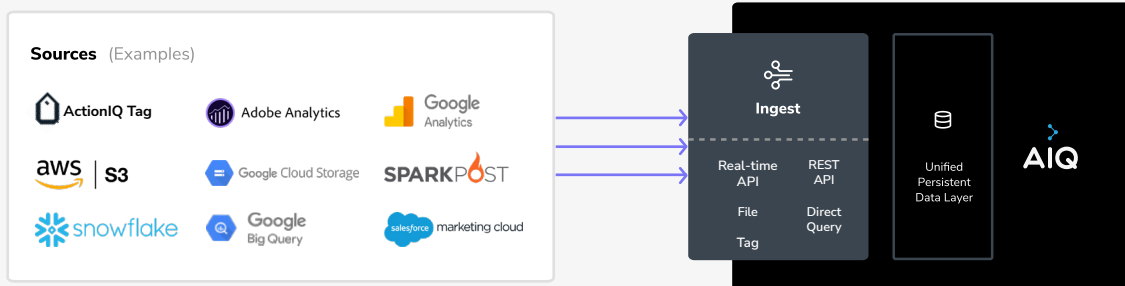
TEI Report on ActionIQ

Ingest

KEY DIFFERENTIATOR

Progressive Data Transformation

ActionIQ ingests customer data as-is, without format or schema requirements, and transforms data at run-time, enabling you to leverage new data sources immediately without months of data prep by IT.

HOW IT WORKS

1. **Data Ingest Mechanisms**

   Use any of the following mechanisms to ingest:

   - **Real-time API** enabled pushed based streaming ingestion directly from source.

   - **REST API** using a pull based custom integration directly to source systems, including clickstream providers, ESPs, CRMs systems and more.

   - **File** based push transfer via SFTP, S3, and GCS.

   - **Direct Query** using a pull-based JDBC connection.

   - **Tag** natively integrated using AIQ SDK on your website and mobile application.

2. **Ingest Process Configuration**

   Tailor ingestion details for each data source and data set. Configuration includes the following options and more:

   - **Frequency**. Streaming ingestion, hourly, daily, etc.

   - **Topology.** Full replace, delta, incremental, hybrid.

   - **Encryption.** GPG/PGP.

   - **Compression.** gz, zip.

   - **Sentinel file** to signal the ActionIQ polling agent that data is ready to be ingested.

3. **Persistent Data Storage**

   All ingested data is persisted in ActionIQ's Unified Persistent Data Layer, creating a single consistent source of truth or all downstream applications.

InfiniteCompute

ActionIQ's proprietary data infrastructure provides unlimited computation power to your teams, allowing them to focus on creating better customer experiences, not technical limitations.

BENEFITS

All Your Data
Access everything you know about your customer, so you can create more relevant and effective experiences.

Every Experience
Coordinate and control every experience to give your customer what they need, before they need it.

All Your Teams
Align all your teams around the customer to collaborate and innovate together in real time.

126TB
Average Data Volume per Client

131B
Average Activations per Client

101MM
Average Profiles per Client

The New York Times

"We have dramatically increased the amount of data that we are able to access for segmentation and targeting. Additionally, we can get insights at a much faster pace, which allows us to be more responsive with more data, and more flexible with ActionIQ."
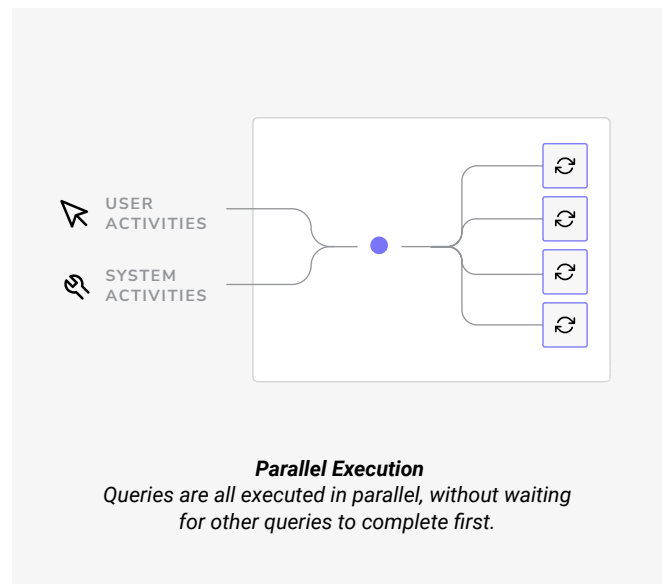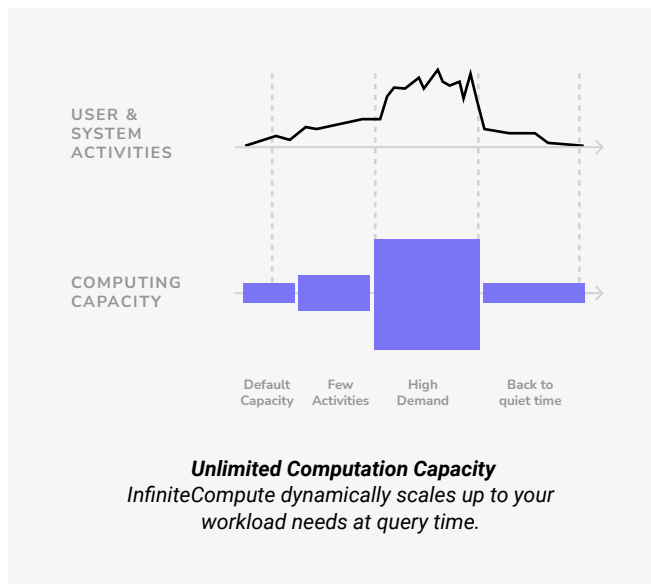
SVP Data and Insights

InfiniteCompute

KEY DIFFERENTIATOR

Instantly Scale to Meet Any Need

InfiniteCompute powers the entire ActionIQ platform and instantly scales to your data and user workloads on-demand and in real-time, allowing you to focus on your customer, not your technology.

HOW IT WORKS

Unlimited Computation Capacity
InfiniteCompute dynamically scales up to your workload needs at query time.

Parallel Execution
Queries are all executed in parallel, without waiting for other queries to complete first.

1. **Power Behind Every Request**

   InfiniteCompute helps power every request on the ActionIQ platform, whether data ingestion, a user generated insight, or a customer journey activated out of the platform.

2. **Dynamic Scale Up**

   InfiniteCompute automatically scales up, providing the resources necessary to rapidly complete received requests.

3. **Parallel Execution**

   Every activity is supported in parallel, so there's no queueing behind other requests that must be completed first.

4. **Dynamic Scale Down**

   Once a request is completed, InfiniteCompute automatically scales resources back down.

Customer 360

ActionIQ's customer profile pillar unifies your data to build a single comprehensive view of all your customers, making your intelligence and experiences more valuable.

APPLICATIONS

PersonMatch
Machine learning powered identity resolution to unify siloed and incomplete customer records.

Attributes
Self-service interface to define new customer attributes on-the-fly from all your data.

BENEFITS

360 View
Build a single, comprehensive, and accurate profile for every customer.

Data Governance
Centralize where your data lives, who has access to it, and how it is used across your systems.

Operational Agility
Unify identities and define customer attributes on-demand, without ever changing the underlying data.

3.5PB
Data Processed per Year

rag & bone
NEW YORK

"AIQ's PersonMatch enables us to recognize customers across multiple touch points, making our insights more actionable and our customer re-engagement programs more effective."

Director, CRM & Consumer Insights

PersonMatch

Machine learning powered identity resolution to unify siloed and incomplete customer records.

KEY DIFFERENTIATOR

More Data, More Controls, Unified Profiles

Using customized configurations, PersonMatch applies deterministic and probabilistic matching techniques to all your data, so you can build a single comprehensive view of the customer.

HOW IT WORKS

1. Data Enhancement

Processes to improve matching results

- **Validate.** Validate the format of PII data received (e.g. email formatted as alias@domain.ext).

- **Standardize.** Trim, remove unwanted characters, and reformat data.

- **Cleanse.** Cross reference blacklist tables and remove invalid values.

2. Data Match

Methods to score and match customer records

NAME		ADDRESS	PHONE	EMAIL
Alexandra	Baker	55 5th Avenue	555-2020	NULL
Alex	Baker	NULL	555-2020	alex@aiq.com
Alexandra	Smith	55 5th Avenue	NULL	alexandra@aiq.com
Alexandra	Baker	100 1st St	NULL	ab@gmail.com

LEGEND: **DETERMINISTIC LINK**   **PROBABILISTIC LINK**   ADDED TO CLUSTER   NOT ADDED TO CLUSTER

- **Deterministic.** Pair generation to find exact attribute matches across profiles.

- **Probabilistic.** Pair scoring to measure record closeness.

- **Clustering.** Match records meeting custom minimum score thresholds.

- **Master.** Creation of a master profile with selection of an ActionIQ customer ID and associated attributes.

3. Data Stitch

Mapping and stitching data back to master records

- Master customer ID linked to all existing and newly ingested data.

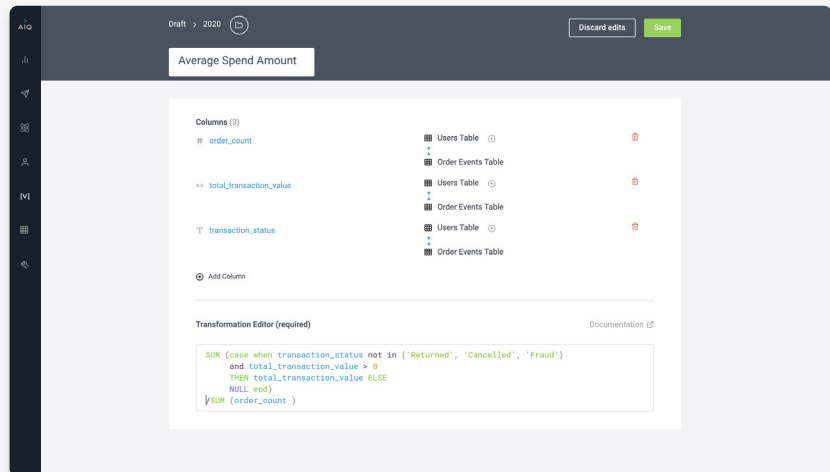- Customer 360 maintained in ActionIQ Unified Persistent Data Layer.

Attributes

Self-service interface to define new customer attributes on-the-fly from all your data.

KEY DIFFERENTIATOR

A More Efficient Approach to ETL

Attributes eliminates the slow and costly IT work required to translate your data into the language of the business. Users can easily tap into all your data to create and activate new attributes in minutes.

Transformation editor with a SQL-like interface to define attributes.

HOW IT WORKS

1. Attribute Creation

Selecting and defining attribute definitions

- **Customer 360.** Built on top of the ActionIQ Unified Persistent Data Layer.
- **Column Selection.** Drag-and-drop data fields to be used in customer attributes.
- **Table Joins.** View join paths between selected customer fields and Customer 360 profiles.
- **Transformation Logic.** Define transformation logic and custom business rules via a SQL-like editor. Transformation logic is applied and computed only at run-time.

2. Attribute Activation

Test and set controls to be published for use by the business

- **Test.** Validate attribution logic against your raw data via row counts.
- **Lock.** Lock definitions and set permissions on who can edit and use attributes.
- **Publication.** Publish attributes for usage across the ActionIQ platform's Customer Intelligence and Customer Experiences applications.
- **Compute.** Apply transformation logic and compute attributes at the time of audience count and/or attribute activation.

Customer Intelligence

ActionIQ's analytics pillar combines self-service insights with powerful machine learning to enable all your teams to collaborate around a single source of customer intelligence truth.

APPLICATIONS

Audiences
No-code interface to define and analyze customer segments in minutes, leveraging all your customer data.

Models
Machine learning framework featuring a library of native models, as well as the ability to host custom-built models.

Insights
Drag-and-drop dashboard to analyze behaviors, visualize trends, and identify anomalies.

BENEFITS

Speed to Market
Automate manual processes and allow business users to generate new insights in real-time.

Organizational Coordination
Enable all your teams to collaborate on a single source of customer truth within one platform.

Deeper Intelligence
Leverage all of your historical and real-time data to better understand and predict customer journeys.

546K
Insights Generated Annually

pandora®

"My team worked closely with ActionIQ to identify the key data points that would enable marketing to self-serve audience creation and gain insights, and finally get us off the SQL crazy train."

Director of Software Engineering

Audiences

No-code interface to define and analyze customer segments in minutes, leveraging all your customer data.

KEY DIFFERENTIATOR

Smarter Audiences Built on All Your Data

Audiences allows non-technical users to access, explore, iterate, and action on all your customer data in minutes. Users achieve better outcomes faster and 100% on their own.
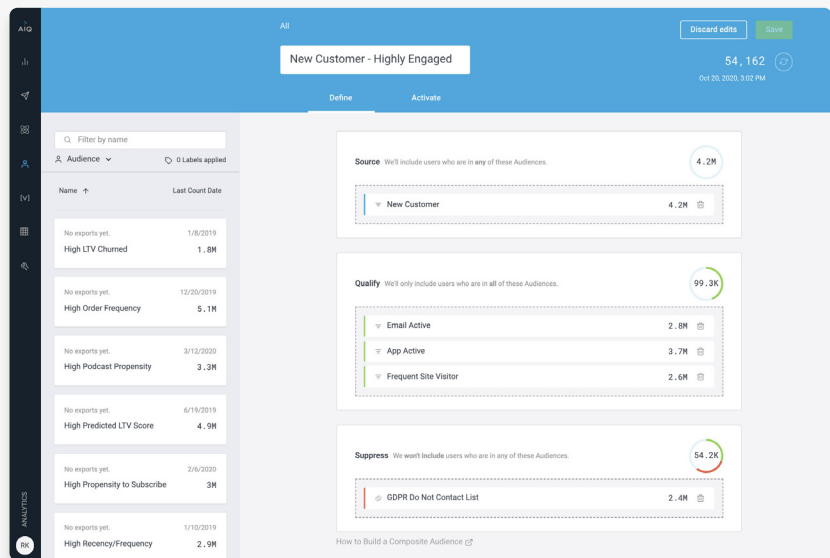
HOW IT WORKS

1. Audience Creation

No-code interface to define and size audiences

- **Criteria**. Elect and filter on attributes within Customer 360, e.g. location, loyalty status, product browsed, app clicks, etc.

- **Segmentation Rules**. Mix and match existing audiences to expand, intersect, and suppress new audience segments.

- **Size.** Compute results across your raw data set in minutes to return the exact number of profiles in a new audience.

Audiences

2. Audience Insights

Generate additional audience insights and analytics

- **Fall Out Reporting**. See where users were added through unions or removed via intersections and suppression criteria.

- **Overlap Analysis.** Identify profiles present in your audience overlapping with other existing audiences. e.g. at-risk audience, high-value audience, retention campaign audience.

- **Attribute Distribution.** Understand the distribution of values within your audience for any attribute, e.g. loyalty tiers, LTV scores, spend thresholds.

- **Dimension Count.** Return counts for additional dimensions in the audience, e.g. users, households, accounts.

3. Audience Activation

Manage audience calculation rules and export destinations

- **Calculation.** Audiences recalculate every time on the freshest set of data, both batch and streaming.

- **Destination.** Leverage audiences within other ActionIQ applications (such as Models and Customer Experiences) and/or from ActionIQ to external or in-house systems.

- **Contact History.** Universal contact history (UCH) metadata is saved in the ActionIQ Unified Persistent Data Layer for every profile within an activated audience.
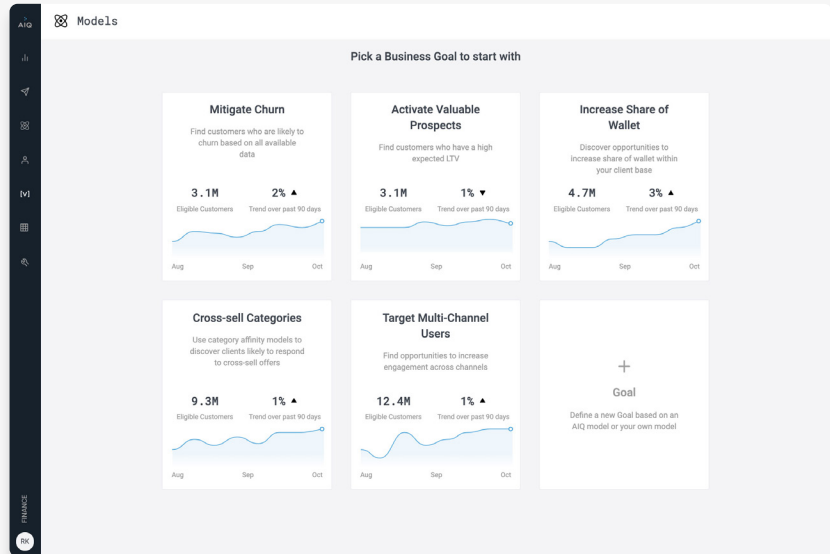
⊠ Models

Machine learning framework featuring a library of native models,
as well as the ability to host custom-built models.

KEY DIFFERENTIATOR

White-Box Models Powered by All Your Data

Models takes a transparent, human-in-the-loop approach to train, activate, and monitor customer model performance—increasing trust, actionability, and scale across data science activities.

HOW IT WORKS

1. Model Creation

Choose from native and off-platform modeling types

- **Native Models.** A library of pre-trained, use case specific models (e.g. likelihood to churn, ideal send time, customer LTV) configured to custom business rules and operationalized through ActionIQ's Insights and Experience applications.

- **Lookalike Models.** Leverage existing audiences to train, score, and operationalize a customer lookalike population across any audience and use case while configuring accuracy thresholds and scoring feature for importance.

- **Hosted Models.** Host and operationalize models built off-platform by data scientist teams using ActionIQ's machine learning framework and Attribute translation layer.

2. Model Activation

Manage and operationalize models to generate new customer insights and experiences.

- **Calculation.** Models are retrained and scored upon every calculation—either at the time of activation or based on the desired parameters you set within the platform.

- **Destination.** Publish models to be used within other ActionIQ applications, such as Insights and Customer Experiences, and/or activated within other systems by ActionIQ.

- **Monitoring.** Set and monitor accuracy thresholds to manage model performance.
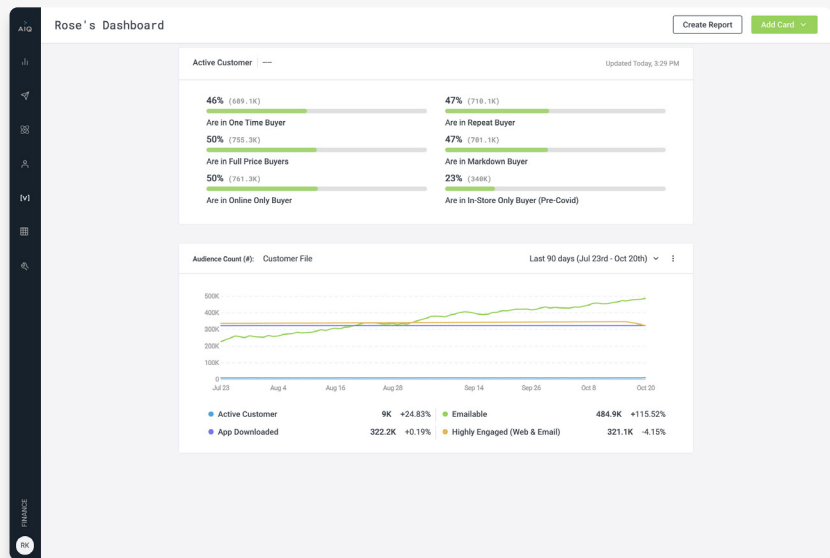
Insights

Drag-and-drop dashboard to analyze behaviors, visualize trends, and identify anomalies.

KEY DIFFERENTIATOR

A Single Source of Customer Intelligence

Insights allows teams across the entire organization to collaborate on a single source of customer intelligence—helping keep customers connected to your brand throughout their entire lifecycle.

HOW IT WORKS

1. **Insights Creation**

   Select the audiences and metrics you want to analyze

   - **Customers.** Choose the audiences and journeys you want to explore.
   - **Metrics.** Select customer metrics you want to measure and/or compare.
   - **Frequency.** Set when and at what frequency to update customer insights based on new data.

2. **Insights Monitoring**

   Choose how to track and share insights across teams

   - **Alerting.** Set variance thresholds and anomaly alerting.
   - **Publishing.** Publish and share insights and alerts with other users and teams.
   - **Testing.** Measure lift and statistical significance omnichannel audiences.

Customer Experiences

ActionIQ's activation pillar is fully integrated with Customer 360 and Customer Intelligence to orchestrate customer journeys and real-time experiences across all your channels.

APPLICATIONS

Triggers
Activate real-time customer experiences based on both streaming data sources and the full historical profile.

Journeys
Orchestrate multi-step customer journeys across all your channels, with real-time channel optimization.

Schedules
Activate planned customer experiences and omni-channel activations with monitoring, A/B testing, control groups, reporting, and more.

BENEFITS

Unified Experiences
Communicate to the customer in a single voice no matter where they are.

Centralized Orchestration
Manage all your audiences and customer experiences from a single platform.

Continuous Experimentation
Test, measure, and iterate customer journeys across all your channels.

3.3T
Personalized Activations Annually

Vera Bradley

"We have implemented ActionIQ to help unify our data and, more importantly, to activate that data in real time. The speed at which we can engage custom audiences has enabled us do much deeper work on specific products that make for a long-term, happy, and engaged customer."

Chief Customer Officer

Triggers

Activate real-time customer experiences based on both streaming data sources and the full historical profile

Combining Historical and Contextual Customer Profile Data

Triggers gives you the ability to orchestrate real-time experiences across any channel using in-the-moment customer actions along with the full historical customer profile.
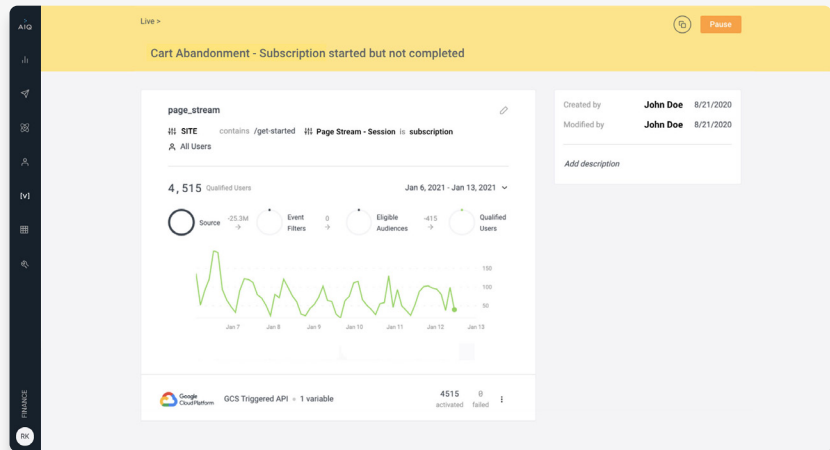
HOW IT WORKS

1. Trigger Creation

Ingest streaming data points and configure trigger rules

- **Ingest Data.** Leverage ActionIQ's REST API endpoint to stream real-time customer events e.g. email opens, website page views, completed transactions, and more

- **Contextual Filtering**. Set trigger qualification rules based on streaming data source activity (i.e. abandoned cart, cancelled subscription, etc)

- **Historical Filtering.** Apply additional filters or qualifiers based on full Customer 360 profile (i.e. spend volume, loyalty status, campaign history, etc.)

- **Contact Management.** Manage contact frequency and suppress profiles the are not qualified to receive the same trigger again within a certain time period

- **Destinations.** Select one or more channels and/or downstream systems to activate out of ActionIQ.

- **Publication.** Once published, datastreams received are qualified against contextual and historical data as well as filter rules, and pushed to eligible streaming destinations.

2. Trigger Activation

Resolve incoming data, activate and measure outgoing trigger experiences

- **Identity.** Identity resolution occurs in real-time, matching streaming customer IDs to known customer records.

- **Metrics.** Measure the volume and performance of your trigger activity as it happens.

Journeys

Orchestrate multi-step customer journeys across all your channels, with real-time channel optimization.

KEY DIFFERENTIATOR

A Single Interface for Orchestrating the Entire Customer Journey

Journeys combine powerful data capabilities with the usability of a drag-and-drop canvas to let you orchestrate tailored and authentic experiences across the full customer lifecycle.
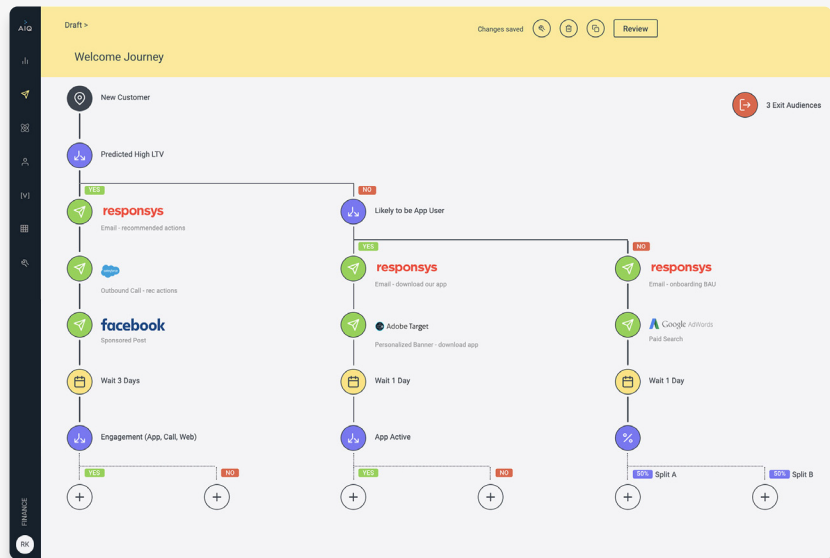
HOW IT WORKS

1. **Journey Creation**

   Drag-and-drop canvas to design end-to-end journey experiences

   - **Entry.** Choose any audience created by a business user, from a customer model, or from another journey.
   - **Personalize.** Manage wait times and split audiences by customer response behaviors or profile attributes.
   - **Test.** Manage holdout groups across the entire journey and within specific branches so you can measure lift.
   - **Exit.** Set exit criteria to remove audiences from journeys prior to completion.

2. **Journey Activation**

   Automate journey exports and integrations across channels

   - **Destination.** Select one or more channels in which to activate audiences and attributes.
   - **Track.** Map and measure journey analytics for each split and touchpoint as well as across the full journey performance.
   - **Contact History.** Journey contact history is saved in ActionIQ's Unified Persistent Data Layer.
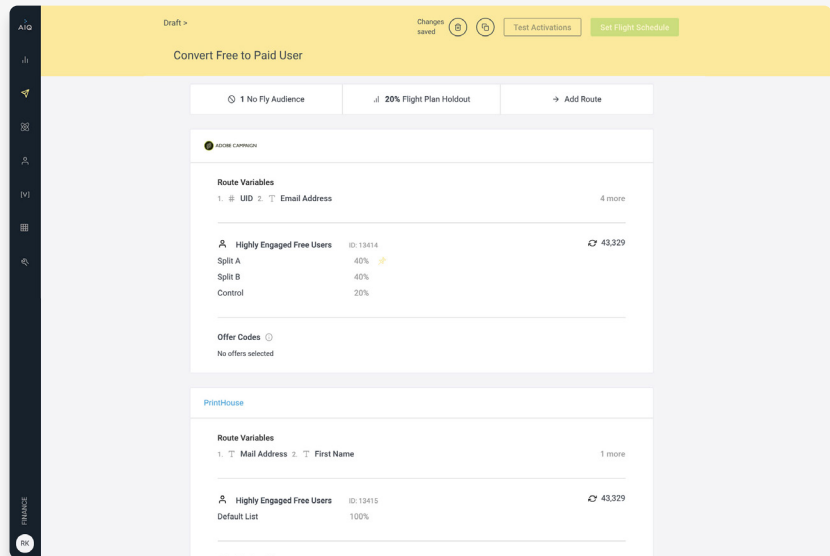
Schedules

Activate planned customer experiences and omni-channel activations.

KEY DIFFERENTIATOR

Any Audience, Any Channel

Schedules allows your teams to send an unlimited number of audiences to an unlimited number of channels, while controlling for timing, cadence, and frequency.

HOW IT WORKS

1. Schedule Creation

Use a drag-and-drop canvas for omnichannel audience activations

- **Destinations.** Select one or more channels in which to activate audiences and attributes.

- **Audience.** Select one or more audiences to activate within destination channels.

- **Attributes.** Select one or more attributes to be used for channel execution, personalization fields, and/or offer codes.

- **Holdouts.** Manage holdout groups and A/B audience splits across channels.

- **Automation.** Define a one time activation, or schedule your customer experiences to be pushed automatically at a predefined frequency.

2. Schedule Activation

Automate exports and integrations across channels

- **Calculation**. Automate audience calculation using the freshest Customer 360 profile at a predefined frequency.

- **Metrics.** Collect and analyze user behaviors in aggregate and compared to holdout groups.

- **Contact History.** Activation history saved in ActionIQ Unified Persistent Data Layer.

Activate

Integrate all your data to your preferred execution system including engagement, sales, service, advertising and more—in any channel, any volume, batch or real-time—all from a single platform.

BENEFITS

Channel Flexibility
Leverage best-of-breed technology to execute the last mile at scale, and avoid cloud vendor lock-in.

Future Proof
Add new channels whenever needed without relying on IT to build and maintain the integration.

Scale
Handle billions of activations per month across all your channels.

Destination Examples

Engagement
- ✉ Email
- ☐ Push Notification
- ☐ SMS
- ▭ Direct Mail
- 🌐 Web

Sales & Service
- 🛒 Ecommerce
- 💬 Sales Rep
- 📞 Call Center

Advertisement
- 🔍 Search
- 🖵 Display
- 👍 Social

Other System
- 📊 Analysis
- 🎁 Offer

1+ Trillion
Experiences activated per year by single ActionIQ client

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pandora®

"We are really impressed with ActionIQ. When we showed the team how easy journey building is now, they almost screamed with joy."
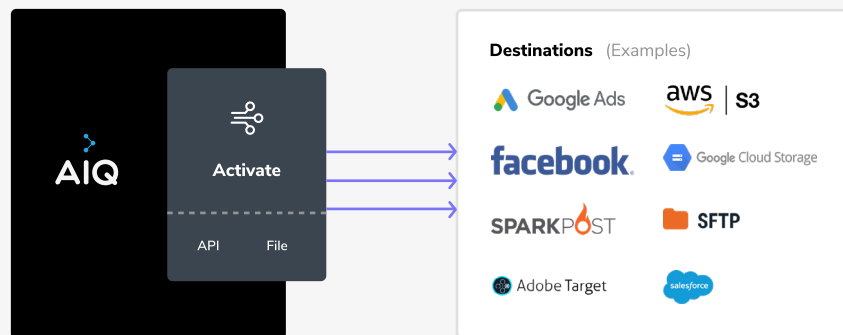
Director of Marketing Technology

Activate

Seamless Integrations

ActionIQ ensure data to transits seamlessly and at scale to downstream systems. User experience is greatly improved, removing duplicated efforts and back-and-forth between systems.

HOW IT WORKS

1. **Activate any channel.**
   Select the channel to activate, whether an engagement, sales, services or ad channel. Data can be activated via any of the following mechanisms:

   • **API** driven activation pushes data by directly integrating with the API of a downstream system.

   • **File**-based activation generates a data file, formatted to the target system's requirements, and pushes it to an accessible location for the downstream system to ingest.

2. **Attributes with Customer Id**
   Along with customer identifiers, select attributes to personalize the customer experience, or identify this experience in future reporting analysis. Light transformation specific to the downstream system can be defined at this stage.

3. **Automation**
   ActionIQ packages all the data and activates automatically according to the defined schedule.

ACTIONIQ

About ActionIQ

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