

 CUSTOMER DATA PLATFORM

One customer, one profile. **Acting in real time.**

How a native CDP unifies every signal, turns it into living audiences and activates them across every channel, with AI in every step of the journey.

 Unify Segment Decide Activate

INSIDE THIS WHITEPAPER

Your data is everywhere. Your customer is not.

The same person shows up as a CRM record, an ecommerce account, an app device and a row in a spreadsheet. This whitepaper explains how to turn those fragments into one living profile and put it to work.

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Who this is for: CRM, data and digital marketing leaders who own customer data across several systems and want every channel to act on the same, current view of the customer.

— THE CONTEXT GAP

Too many channels. **Zero context.**

Most brands have added channel after channel. Each one keeps its own list, its own consent and its own idea of who the customer is. The result is one customer stored as three different records.

**CRM**

Ana García · email · last contact 2024

**Shopify**

a.garcia · phone · 3 orders

**Excel**

ANA G. · store card · no consent



01

No shared context

Every tool talks to the customer. None of them knows what the others just said.



02

Data never reaches the CDP

Events stay in the app, the store or the ecommerce platform, where marketing cannot act on them.



03

The funnel leaks at every stage

Without one view, carts, forms and renewals slip away between systems.

THE SHIFT

A CDP is not another database. It is the layer that turns every signal into a real-time decision.

02

UNIFY

One profile per customer. **Every channel.**

Identity, attributes and events come together around a single customer key. The profile starts anonymous, becomes known the moment the customer identifies, and keeps its history intact.



UNIFIED PROFILES

Anonymous today. Known tomorrow.

Most customers start as a device. The indigitall CDP tracks anonymous devices from the first visit and links them to a known profile when the customer logs in, buys or shares an identifier. Nothing learned along the way is lost.

ONE CUSTOMER, OVER TIME

- Anonymous device on web**
Views a product page twice
- Opts in to web push**
Still anonymous, now reachable
- Adds to cart from the app**
Second device, same behavior pattern
- Logs in with email**
Identity resolved. Devices and history merge
- Confirms order on WhatsApp**
Consent and channel preference stored



Unified profile

Customer key: email (hashed)

Devices	Web · App
Channels with consent	Push · WhatsApp · Email
Last event	order_confirmed
Attributes	City · Tier · Preferred store
Segments	Recent buyers · App active

The unique customer key can be an email, a phone number or a national ID, hashed or plain.

HOW DATA GETS IN



REST API

JSON or CSV, for real-time updates



SDK

App and web devices, sessions and events



SFTP and files

SFTP, Google Drive and CSV loads



Connectors

Salesforce, HubSpot, Shopify, VTEX, Monday



Initial load, then continuous sync. Bring your history in once, then keep the profile current with hourly or real-time synchronization.

THE FIVE DATA LAYERS

IDENTITY

Resolution across web, app, WhatsApp and store

ATTRIBUTES

Typed, enriched in real time

EVENTS

Every interaction, with schemas, ready to activate

SEGMENTS

Audiences in natural language

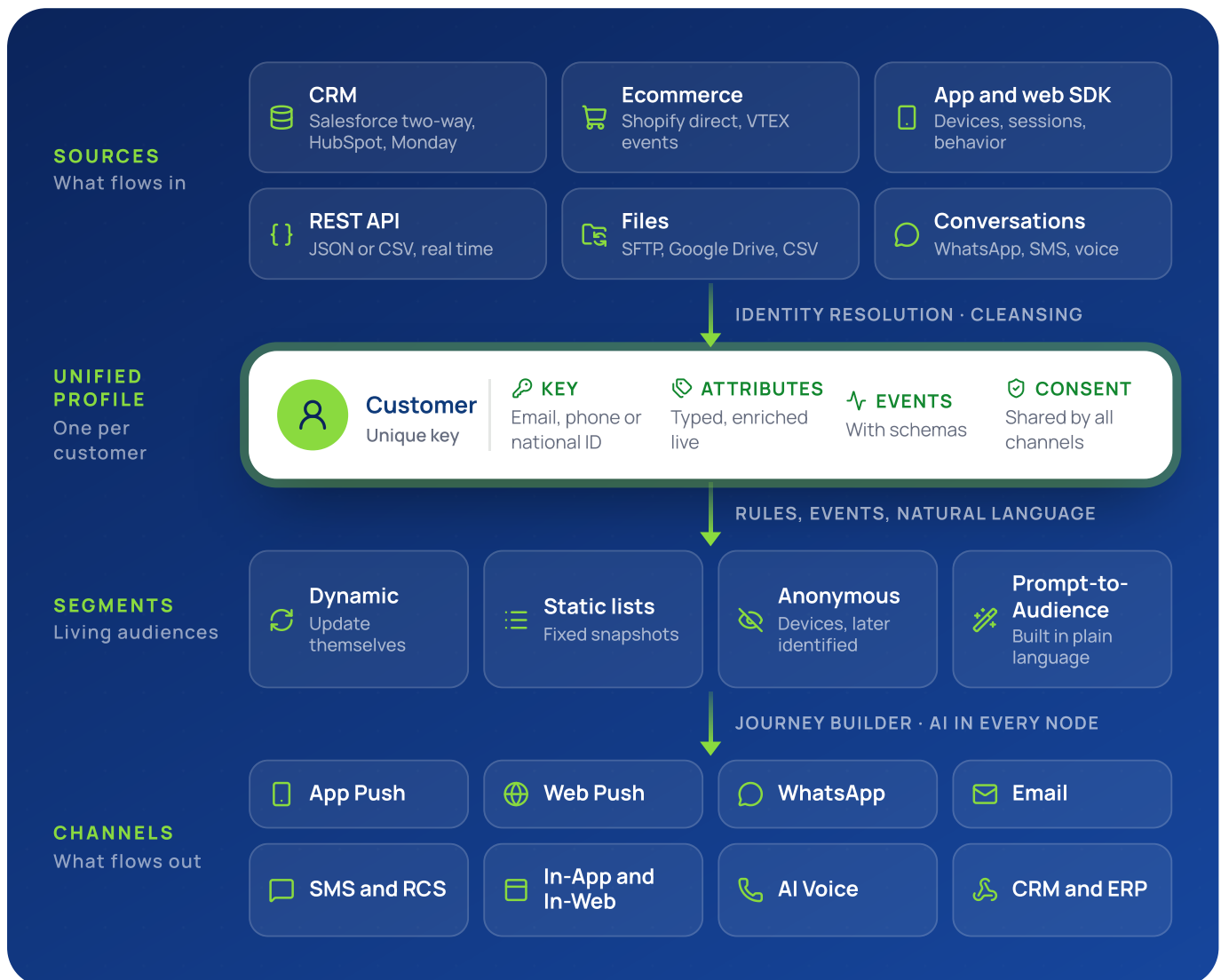
ACTIVATION

The right channel at the right moment

— THE DATA MODEL

Data in, activation out. No silos.

One architecture from source to channel. Load your history once, then keep every system in sync hourly or in real time.



Clean data by design

A native module cleans corrupt phone numbers coming from the CRM.



Segments go everywhere

Every segment propagates automatically to every channel.



Completes your CRM

The CDP does not replace your CRM. It completes it with the unified customer.

03

DECIDE AND ACTIVATE

Living profiles. Journeys you edit live.

Static lists, rigid rules and campaigns you could not touch give way to segments that update themselves and journeys where AI decides the channel and the moment.



— REAL-TIME EVENTS AND SEGMENTS

Capture any behavior. **Act instantly.**

New in 2026, real-time events let teams define event fields without a data team. A behavior lands in the profile, the dynamic segments it belongs to update, and any journey listening for it can start.



— PROMPT-TO-AUDIENCE

Describe the audience. **Get the segment.**

Prompt-to-Audience builds segments in natural language. Marketers describe who they want to reach and review the conditions before activating, with no query language and no ticket to the data team.

 **PROMPT-TO-AUDIENCE**

 App users who viewed mortgages twice this week and have not started an application

 **Device: app** and

 **view_mortgage ≥ 2 · 7 days** and

 **No application_started**

Dynamic · updates in real time

 **Save segment**

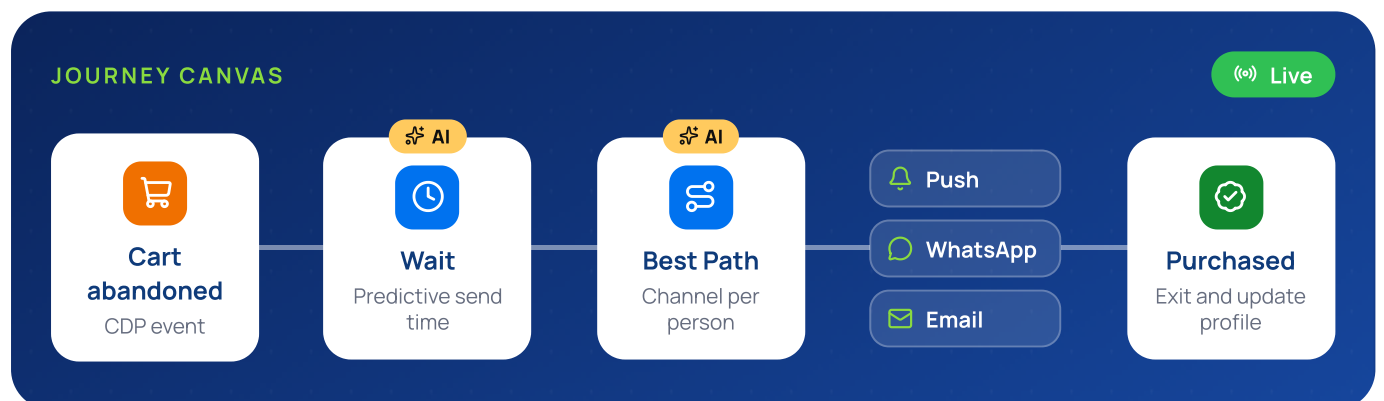
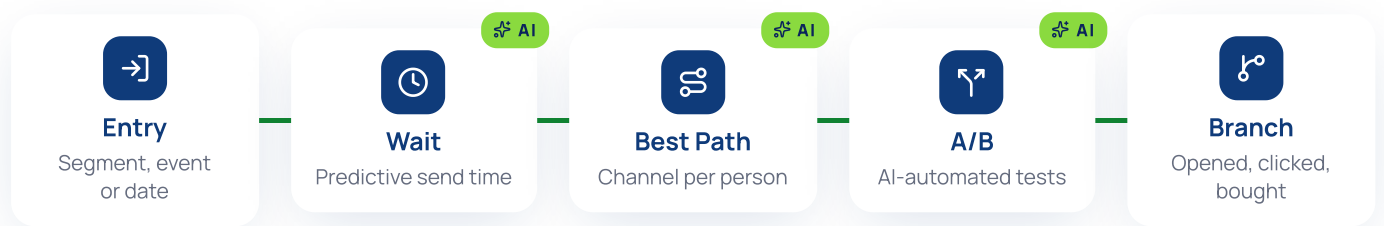
— EVENTS THAT DRIVE JOURNEYS, BY INDUSTRY

Industry	Data in	What it activates
Retail	VTEX and Shopify events, online and store	One view of online and store customers
Healthcare	SAP appointments through the CDP	Appointment journeys with the record number in the deep link
Banking	Two-way Salesforce sync	Collections segmentation by credit status and DPD
Travel	PMS and CRS events	Upsell and win-back journeys

— CUSTOMER JOURNEY BUILDER

AI in every node. One flow.

Drag-and-drop journeys read directly from the CDP. AI optimisation is built into every node, so timing, channel and content adapt to each person instead of to a fixed schedule.



One journey reads the CDP, lets AI pick the moment and the channel, and writes the result back to the profile

ACTIONS Push WhatsApp Email SMS Voice **Live journey editing**

Change offers and copy in an active journey without cloning it. Journeys can also start and stop automatically for peaks like Black Friday.

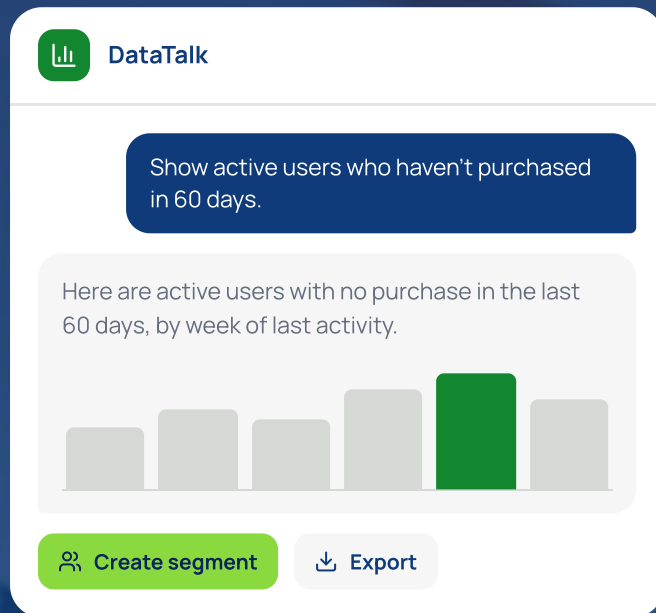
 Predict, then act

Churn-probability scoring flags customers at risk. Webhooks, attribute updates and no re-entry rules keep every flow in step with your systems.

— DATATALK

Ask your data. **It answers, and acts.**

DataTalk is the AI assistant on top of your CDP. Ask in plain language and get charts, tables and KPI cards from the live CDP. No SQL, no waiting on an analyst.



- ✓ Agentic actions, such as building the segment "Premium_Buyers_MAD": Madrid, over 20, spend over €100
- ✓ Answers come from the live CDP via MCP, within each user's permissions
- ✓ Reference documents and keyword definitions, so every user gets the same answer
- ✓ Per-customer communication history, searchable before an operator picks up the phone

TRY ASKING

"How did last month's push campaigns perform?"
"Which audiences have the highest click-through this quarter?"

BEFORE**SQL and waiting**

A question becomes a ticket. An analyst writes a query. The answer arrives after the moment has passed.

WITH DATATALK**An instant answer**

Ask in plain language, see the chart, then turn the result into a segment in the same conversation.

INDIGITALL MCP**Your CDP, in the AI assistant you already use.**

Connect indigitall to Claude, ChatGPT, Copilot or Gemini and ask about campaigns, journeys and chat in plain language. Data stays in indigitall. The connected model only queries it, under your roles and permissions.

— CUSTOMER RESULTS

Unified data, measurable returns.



GROCERY RETAIL · MEXICO
Soriana

"For them push isn't a channel. It's a fifth of their sales."

Push driven by CDP behavioral segmentation, so each customer receives the offer that matches how they shop.

20%

Of all sales from push

+78%

Satisfaction

+18%

Benefit redemption



FINANCE
MIO

One segmented journey from email to push to WhatsApp, each step fed by the same profile.

84%

Open rate

30%

Conversion



BOOKSELLER · SPAIN
Casa del Libro

A cart-recovery journey with push, plus geofenced push across 47 bookstores.

5.6%

Abandoned carts recovered

+6%

Revenue



Interbank

BANKING · PERU

"Segmented push grew mortgage disbursements by 15%." CDP segments put the right offer in front of the right customers.

+15%

Mortgage disbursements

Data attributed to real customers, not a guarantee.

— MORE CUSTOMER RESULTS

From profile to outcome.

**HOSPITAL GROUP · SPAIN**

With the CDP, Vithas moved patient messages from SMS to richer channels.

2x

Patient engagement

-35%

SMS cost

**HEALTHCARE · SPAIN**

CDP reminders on WhatsApp, SMS and push, the Gen AI bot Sania and Voice AI in one patient flow.

-60%

No-shows

+50%

Confirmations

**PET FOOD**

Targeted push built on CDP segmentation, growing a reachable audience month after month.

2.1M

Segmented pushes

3x

Audience in 7 months

**TOURISM · MEXICO**

Anonymous web visitors captured with Web Push and fed into existing Salesforce Marketing Cloud flows.

13.5M

Devices

720K

Opt-ins

Data attributed to real customers, not a guarantee. Sanitas also reports 85-90% confirmation with Voice AI.

— CDP BENCHMARKS

Up to +80%

LTV

+40%

First-party data quality

+25-30%

NPS

Average benchmarks across indigitall customers. They are not a guarantee and vary by sector and use case. Source: indigitall benchmark library.

DATA RESIDENCY AND SECURITY

Your data, your region. Secure by default.

A unified profile is only valuable if it is trusted. indigitall lets you choose where customer data lives and keeps it under your control from ingestion to activation.



Choose your cloud

Multi-tenant EU1, EU2, EU3 or AM1, or a private cloud. Hosting on Google Cloud in the EU and the US.



Encrypted and guarded

Per-project encryption, end-to-end encrypted push and PII guardrails, part of the 2026 security and privacy releases.



Consent you can trace

GDPR and ePrivacy onboarding with traceable consent, shared by every channel that reads the profile.



AI without data leakage

RAG is trained only on your content. No conversation or query is sent to external LLM providers to train models.

DEPLOYMENT OPTIONS**EU1**

Multi-tenant

EU2

Multi-tenant

EU3

Multi-tenant

AM1

Multi-tenant

Private

Dedicated cloud



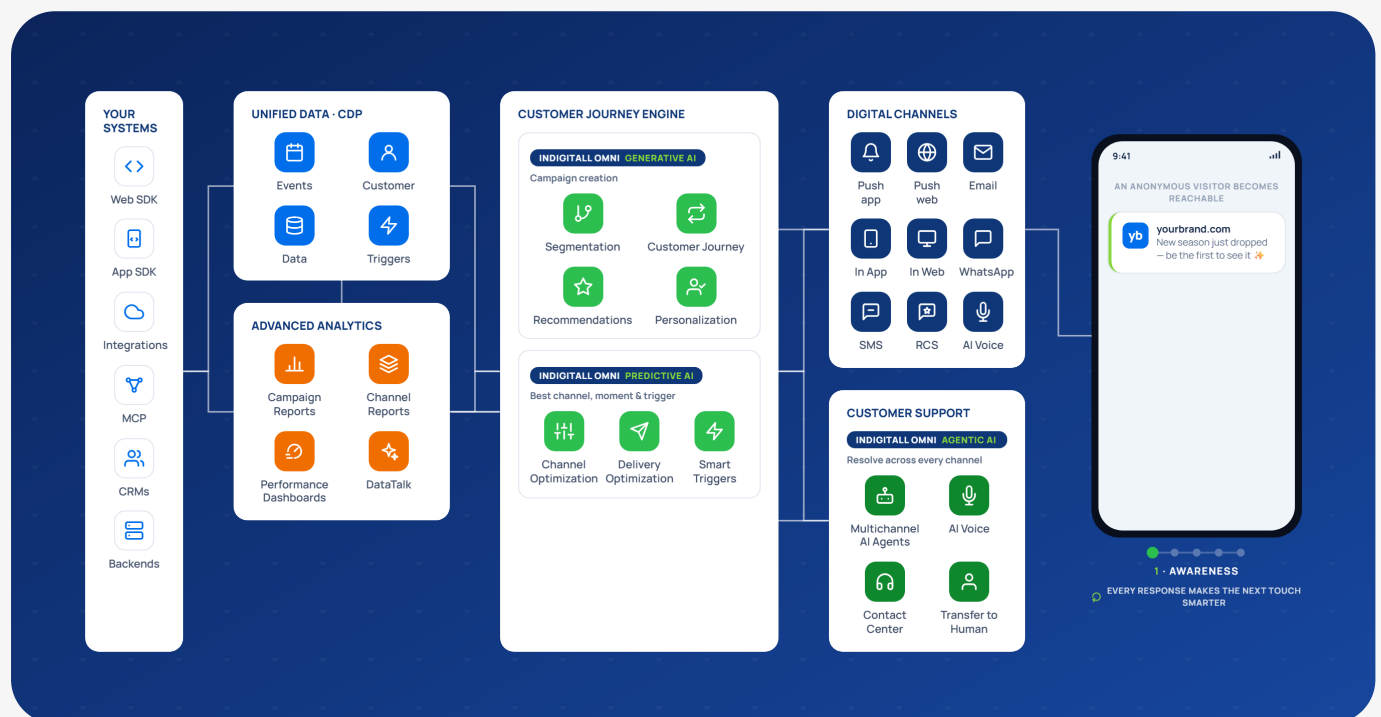
ISO 27001 certified. GDPR compliant.

indigitall connects to your systems via API and webhooks. It brings information in, returns results and never moves data outside your environment.

— HOW INDIGITALL WORKS

The CDP is the core. The reach is total.

Your systems feed a unified CDP. Omni AI decides the best channel and moment. The Customer Journey Engine orchestrates every touchpoint, and conversations flow back into the same profile.



 **Integration-first**
Salesforce, HubSpot, Shopify, VTEX, Monday and more, through REST APIs, SDKs, CSV and SFTP.

 **One console**
Channels share consent, customer data and one analytics layer.

 **Local, human support**
A named CSM, 24/7 support from Spain and in-person onboarding at no extra cost.

 **CHANNELS**
18+

 **MESSAGES A MONTH**
1B+

 **COUNTRIES**
20+

 **ENTERPRISE CLIENTS**
215+

— CDP MATURITY AND READINESS

Where are you today? What's next?

STAGE 1**Siloed**

Each channel keeps its own list and consent. Batch sends.

**STAGE 2****Connected**

Key systems sync to one profile. Static segments.

**STAGE 3****Real time**

Events drive dynamic segments and journeys.

**STAGE 4****AI-native**

AI picks channel and moment. Teams ask data in plain language.

**Identity**

- ☐ We have chosen one unique customer key
- ☐ Anonymous devices link to known profiles on login
- ☐ Corrupt phone numbers are cleaned at the source

**Data flow**

- ☐ CRM and ecommerce sync hourly or in real time
- ☐ Key behaviors are captured as events with schemas
- ☐ Consent is stored once and shared by every channel

**Audiences**

- ☐ Core audiences are dynamic, not exported lists
- ☐ Marketers can build segments in plain language
- ☐ Segments reach every channel without re-uploads

**Activation and trust**

- ☐ Journeys start on events, with AI in each node
- ☐ Each journey has a fallback channel
- ☐ Data residency and certifications are confirmed

— THREE FIRST MOVES

 STEP 1

Pick the customer key and connect your CRM

 STEP 2

Turn your top behaviors into events and dynamic segments

 STEP 3

Launch one event-triggered journey with a fallback channel

SCORE YOURSELF

Fewer than six boxes ticked? Start with identity and data flow. The rest builds on them.

NEXT STEP

One platform. Every channel. **Zero silos.**

See how the indigitall CDP and Customer Journey Builder can unify your customer data and activate it on your own channels.

 Book a demo

 indigitall.com