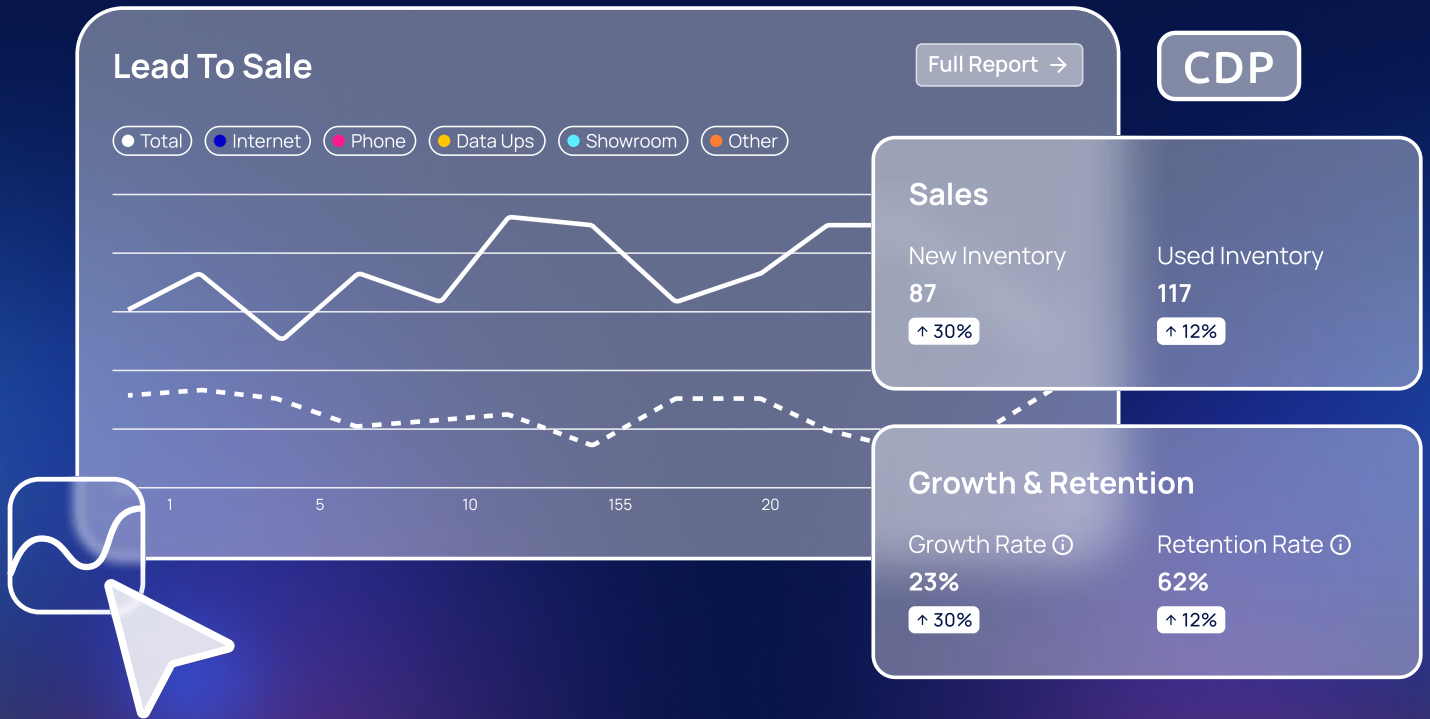




Guide | 2025



The Dealer's Guide to Choosing a CDP in the Age of AI



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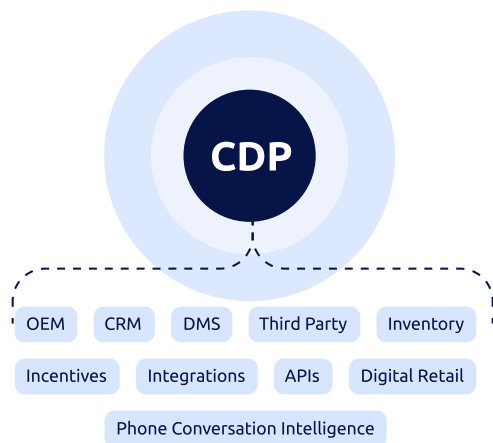
I: An Introduction to Customer Data Platforms (CDP)

What is a Customer Data Platform?

A customer data platform (CDP) is a powerful tool that helps dealerships unify and manage customer data from multiple sources. A CDP designed specifically for the automotive sector will have native integrations with the unique dealership ecosystem, including CRMs, DMS, inventory systems, and website analytics. With a CDP, you can get a complete view of your shoppers and customers, create personalized shopping experiences, and improve your marketing to advance your dealership's bottom line.

Why does my dealership need a CDP?

As customer-centricity becomes increasingly important for businesses worldwide, a CDP is an essential tool for dealerships looking to stay ahead of the competition. By leveraging the insights and capabilities of a CDP, you can deliver the personalized, relevant experiences that build customer loyalty and drive growth. A modern, AI-powered CDP acts as the crucial foundation, turning raw data into predictive intelligence that drives smarter, more automated business decisions.



II: The CDP as the Central Nervous System for AI and Future-Ready Capabilities

The future of automotive retail is intrinsically tied to Artificial Intelligence. A **future-proof CDP** isn't just a data organizer; it acts as the dealership's control center for data and connections offering secure, real-time context to your dealership's AI strategy, powering everything from hyper-personalized customer outreach to autonomous agents. When choosing a CDP, you must look for integrated AI capabilities that transform unified data into actionable intelligence.

The CDP's Role in Powering AI Agents:

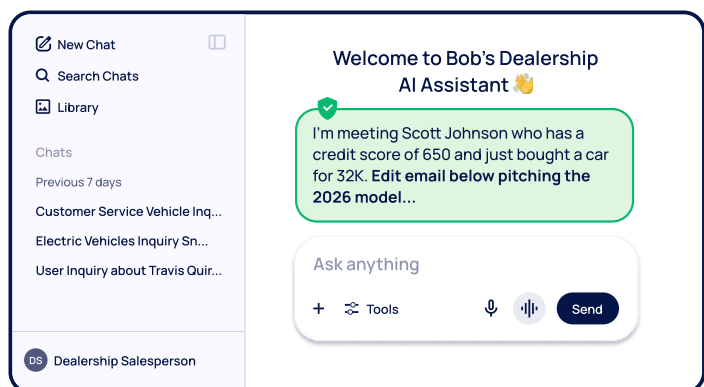
The future of automotive retail lies in AI Agents - autonomous digital workers capable of handling complex, end-to-end tasks like lead qualification, inventory matching, and service booking. A CDP is not just data storage; it's the central nervous system that makes these agents function.

"A CDP is not just data storage; it's the central nervous system that makes these agents function."

2. AI-Driven Automation & Orchestration

AI transforms the CDP from a passive data repository into an active, intelligent partner.

- **Good:** The CDP integrates with your marketing tools to execute rule-based campaigns (e.g., send an email 3 days after a website visit).
- **Better:** The platform includes AI-powered optimization to automatically manage and shift ad spend across different digital channels in real-time to maximize ROI based on lead-driving performance.
- **Best:** Intelligent Orchestration utilizes AI Agents to automate complex, multi-step workflows. This includes:
 - Conversational AI integration: Managing and routing real-time customer inquiries via chat, text, or voice 24/7, and automatically scheduling appointments.
 - Proactive Outreach: Automatically generating and sending hyper-personalized follow-ups or service reminders (like for predictive maintenance) based on data-driven signals.
 - Natural Language Query (NLQ) Segmentation: Allowing your marketing team to build complex audiences simply by typing requests in plain language (e.g., "Show me all customers who viewed three or more SUVs in the last 7 days but haven't engaged with an email in 30 days").



3. Seamless Integration with AI Ecosystem

Your CDP is the central nervous system for all future AI applications in your dealership.

- **Good:** The CDP has a well-documented API for exporting data to other systems.
- **Better:** The CDP offers native or deeply integrated AI tools that leverage its unified data, such as AI-powered web personalization, ad activation, and lead scoring, without requiring complex, separate data transfers.
- **Best:** The platform is built to be future-proof, ensuring seamless integration with new and emerging AI technologies, including your own custom-built internal AI agents. This guarantees the CDP will support your next 5-10 years of business and technological evolution.

III: Must-Have Features for Your Dealership's CDP

1. Partner Integrations:

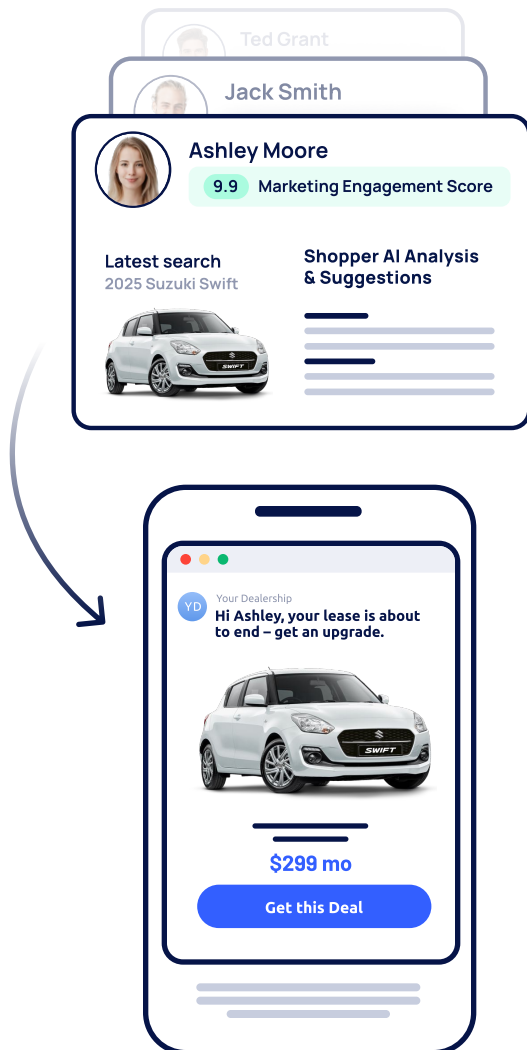
In order to function at its best and provide you with accurate, real-time data, your CDP needs integration capabilities for the different data sources currently in play at your dealership.

- **Good:** A CDP should be able to easily integrate dealership data from various sources, including CRM systems, DMS, and web analytics tools to create a comprehensive view of your customers and their interactions with your dealership.
- **Better:** Your CDP shouldn't hinder your progress, it should lean into it. Strong CDPs have open APIs that give you flexibility in 'swapping' out data sources, allowing your dealership to

stay flexible and scalable. This way, if your dealership decides to try a new DMS or CRM, your CDP can easily adapt.

- **Best:** A truly excellent CDP will take things a step further by spotting opportunities in your data based on shifts in customer behavior. The CDP then immediately - and automatically - takes action by shifting your dealership marketing and email campaigns to reflect that change. This is key to help scale your dealership's growth. This level of technology is consistent with an AI first CDP that offers integrated marketing solutions.

Hottest Opportunities



2. Data Management & Governance

If your dealership offers financing or leasing options, then you are considered a financial institution under the FTC's Safeguards Rule (part of GLBA). Compliance is mandatory and now requires specific, up-to-date security measures. Poor data governance increases your susceptibility to fines and lawsuits, making a security-focused CDP an essential investment..

- **Good:** A CDP should have robust data management and governance features to ensure that your customer data is accurate, up-to-date, and secure.
- **Better:** Data doesn't just need to be secure, it also needs to be clean. Look for features such as data cleansing, data maintenance, and identity resolution technology to deduplicate and unify profiles, ensuring a single source of truth.
- **Best:** Your CDP needs the ability to react to changes in order to properly manage data privacy and compliance. If a customer or a lead decides they want their information deleted or changed, your CDP needs to be able to quickly comply. Beyond compliance, the best CDPs use AI to continuously monitor data quality, automatically detecting anomalies and filling in missing values to maintain high-quality data for their models .



3. Personalization Capabilities:

Customer retention should be a key strategy for your dealership so you can remain resilient through any economic shift. Personalization can help increase retention by creating excellent one-to-one experiences for your customers.

- **Good:** A CDP will create a 360-view of your customers so you can create personalized, targeted experiences.
- **Better:** Some CDPs offer advanced personalization capabilities like targeted marketing campaigns and website experiences based on customer behavior and preferences.
- **Best:** In addition to personalization, an excellent CDP will have advanced segmentation capabilities that allow you to create or automate hyper-specific audiences based on specific behavior or demographics. This can help you deliver personalized, relevant experiences that drive conversions and customer loyalty.

Used leads from last year, currently on the website
194 Shoppers

Old Lead, No sale, Currently on Website
6,368 Shoppers

Fullpath leads + Recent Appointments
2,645 Shoppers

Used Car Leads Early December
594 Shoppers

III: The Price is Right: Cost & Pricing Considerations

Investing in a CDP is a long-term commitment that can create significant savings for your dealership over time. It is important to carefully review the costs and pricing options to make an informed decision that aligns with your budget and your business goals. Here are a few key points to consider:

One-Time Costs v. Subscription Fees:

Some CDPs may offer one-time licensing fees, while others offer subscription-based pricing. Consider which option aligns best with your dealership's needs and budget. It is important to note that subscription models typically grant you access to new features as they are released, meaning your software gets better over time.

Customization & Implementation Costs:

Some CDPs offer customization and implementation packages to help you get up and running more quickly and effectively. These packages may come with additional costs so be sure to factor them into your budget.

Maintenance & Support Costs:

Be sure to consider and calculate the ongoing costs of maintaining and supporting your CDP. Look for a software provider that offers flexible, all-inclusive support options.

IV: Up & Running: Tech Support During CDP Implementation

Implementation and set up of a CDP can seem like an overwhelming task - but in truth, with the right provider on your side, getting the software up and running should be a seamless process.

When researching CDPs for your dealership, take the setup process into consideration. Without the proper set up and training, you may miss out on critical features included in the CDP that can help elevate your dealership.

Here are 5 questions to ask when selecting a CDP provider for your dealership:

1. What resources or consultation does the provider offer to help our dealership define our key business goals (e.g., increase CLV, lower CAC) and prioritize the initial CDP use cases?
2. What resources and training materials are provided by the company so my team can get the most out of the CDP?
3. How long does the CDP setup process take and what steps are included?
4. Is there a support team that I can speak to during the setup process?
5. Is there continued support from the company after the initial CDP setup is complete?

The answers to these questions should be able to help you determine whether or not the provider you are considering is the right match for your dealership.

V. At Your Service: Customer Support

If your dealership has experienced poor customer service from vendors in the past, you understand the importance of finding a partner that values and prioritizes your needs.

Excellent customer support and service is key in ensuring that your dealership will get the most value out of your chosen CDP. Be sure to investigate the support options offered by your chosen CDP provider, their availability for you as a customer, and how they communicate and respond to incoming inquiries (email, phone, live chat support, etc.).

You may also want to read through customer reviews and speak to others in the industry to get their thoughts on their CDP provider. Sometimes the best information can come from those who have previous, real-world experience with the company and can provide insights based on that experience.



Conclusion

Choosing the right Customer Data Platform is one of the most important decisions your dealership can make as you move into an AI-driven future. A modern CDP does more than collect data — it unifies identity across touchpoints, powers real-time AI-driven actions, protects customer privacy, and turns fragmented signals into measurable business outcomes like higher conversion rates, better retention, and smarter service operations.

When evaluating CDPs, **prioritize three things:** future-proof AI capabilities (real-time context, predictive models, and orchestration for AI agents), strong data governance and identity resolution, and deep integrations with your dealership systems (CRM, DMS, inventory, web, and service). Also weigh implementation, ongoing support, and total cost — the right vendor will be a true partner that helps you define goals, run pilots, and scale successful use cases.

Practical next steps:

- Audit your current data sources and map the key use cases you want to solve.
- Define 2–4 measurable KPIs to judge success.
- Shortlist CDPs that demonstrate real-time identity resolution, built-in AI or seamless AI integrations, and relevant dealer ecosystem connectors.
- Ask vendors about implementation timelines, training, SLAs, and governance controls.
- Measure results, iterate on models and workflows, and expand the CDP's role as you gain confidence.

A CDP is not just a technology purchase, it's the backbone of a modern, customer-first dealership. Pick a platform and partner that helps you move from fragmented interactions to seamless, personalized experiences powered by secure, governed AI. Do this well, and your dealership will be positioned to win more customers today, and adapt faster tomorrow.

Choosing the right Customer Data Platform is one of the most important decisions your dealership can make as you move into an AI-driven future.