



CERTIFICATION PREPARED FOR

# Progress Software Corporation

2024 UPDATE March 25, 2024

CONFIDENTIAL



HEREBY GRANTS THIS

# RealCDP CERTIFICATE 2024

PRESENTED TO

**PROGRESS**

Entitled to be known as a RealCDP™ and authorized to display the RealCDP™ badge for successfully completing a comprehensive evaluation and providing satisfactory proof that meets all qualifications set forth by the Customer Data Platform Institute.

In Witness Whereof, this Twenty-fifth day of March 2024.

A handwritten signature in black ink that reads 'David M Raab'.

**DAVID RAAB**  
President, CDP Institute



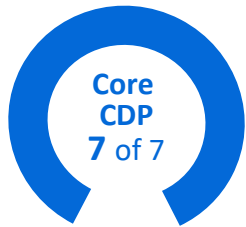
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**VERNON TIREY**  
RealCDP Auditor



Confidential Report For: Progress

Audit Complete Date: 3/18/2024



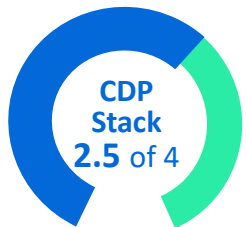
- ✓ Ingest Data
- ✓ Maintain Data
- ✓ Store Historical Data
- ✓ Unified Customer Profile
- ✓ Privacy
- ✓ Share Customer Data
- ✓ Real Time Data Updates

**Progress Sitefinity Insight is a RealCDP from Progress Software.** A component of the Progress Digital Experience Platform, Sitefinity Insight enables a single view of the customer, advanced customer personalization and digital experience management for web channels. This CDP also supports basic segmentation and targeting for email and CRM. Deployed on Azure, Sitefinity Insight is a multitenant SaaS solution that captures, manages, and shares 1<sup>st</sup> and 3<sup>rd</sup> party data through Sitefinity Integration Hub, a data integration/import solution built on embedded Workato technology and Azure Data Factory. Azure SQL DBs, Azure Blob Storage, and SPARK support structured, semi-structured, and unstructured data. Scalability is dynamic, and there are no restrictions for data volume or data retention. Sitefinity Insight meets all the required security, risk, and compliance certifications but Privacy and ID resolution functionality is basic.



- ✓ Channels Supported
- ✓ Data Sources Supported
- ✓ 3rd Party Applications
- ✓ Real Time Processing
- ✓ Data Hygiene
- ✓ End User Training

**Sitefinity Insight comes with data integration and real time processing tools.** API integration options are well documented, and Sitefinity Integration Hub comes with 100s of connectors, more connectors are available through Azure Data Factory. Sitefinity Insight has its own tagging and also supports tagging using Google Tag Manager. Sitefinity Insight comes with over 20 predefined types of web interactions enabling detailed journey analysis. The system does not include data enrichment capabilities or services but supports user-defined customer profiles and demographics to enhance personalization. Real time processing is available with Sitefinity Insight. Real Time decisioning is possible with the purchase and integration of Progress Corticon, a separate component of Progress Digital Experience Platform. True ETL functionality and data hygiene are not included but are easily integrated. Training, documentation, and manuals are delivered with Sitefinity Insight.



- ✓ Analytics & Reporting
- ✓ Model Building & Scoring
- ✓ Personalization
- ✓ Journey Orchestration

**The Sitefinity Insight CDP stack is CMS-centric and delivers advanced functionality when integrated with Sitefinity CMS.** Reporting, Analytics, Predictive Models, Personalization, and Journey Orchestration are architected to provide a rich set of capabilities for the web but do not currently extend to other marketing channels. Reporting is basic but this CDP does have connectors with leading BI solutions such as Microsoft Power BI and Looker Studio. A suite of OOTB analytics and AI tools deliver advanced capabilities such as A/B testing and content recommendations for conversion rate optimization, segment discovery, lead scoring, and more. Personalization includes variable messaging, variable content, and personalized web page delivery. Journey orchestration for the web experience is unique for CDPs but not for some CMS systems.

## OTHER

**Sitefinity Insight CDP is architected to deliver best practices CMS customer experience capabilities.** Unlike many CDP solutions that treat the web experience as an afterthought, Sitefinity Insight is architected first and foremost to deliver advanced personalization and a rich CMS customer experience to the Progress Digital Experience Platform where advanced analytics, personalization, and customer journey orchestration are tightly integrated.

## SUMMARY

**Sitefinity Insight is a unique RealCDP focused on the CMS customer experience.** Although this solution is relatively young, mission-critical parts of Sitefinity Insight are built with mature and proven best practices components making Sitefinity Insight one of the strongest CDP offerings for CMS and the web. As the offering matures, we expect to see omnichannel marketing sophistication grow beyond CMS, Email, and CRM.



# Progress Software Corporation Findings

The CDP Institute audits 17 CDP related capabilities. Below are the high-level findings for Progress. Requirements fall into three categories:

- ✓ Meets All Requirements
- ✓ Meets Some Requirements
- ✓ Meets No Requirements

CAPABILITY	TYPE	Findings
✓ Ingest Data	Core CDP	Meets all requirements
✓ Maintain Data	Core CDP	Meets all requirements
✓ Store Historical Data	Core CDP	Meets all requirements
✓ Unified Customer Profile	Core CDP	Meets all requirements
✓ Privacy	Core CDP	Meets all requirements
✓ Share Customer Data	Core CDP	Meets all requirements
✓ Real Time Updates	Core CDP	Meets all requirements
✓ Channels	CDP Enhancement	CDP supports web, email, and CRM channels but not digital advertising and social
✓ Data Sources Supported	CDP Enhancement	Meets all requirements
✓ 3rd Party Applications	CDP Enhancement	Meets all requirements
✓ Real Time Processing	CDP Enhancement	Meets all requirements
✓ Data Hygiene	CDP Enhancement	CDP supports but does not include full ETL and data hygiene functionality
✓ End User Training	CDP Enhancement	Meets all requirements
✓ Analytics & Reporting	CDP Stack	CDP supports limited reporting and does not provide an end-user BI solution
✓ Model Building & Scoring	CDP Stack	CDP is not a statistical Model platform but does come with suite of pre-built models
✓ Personalization	CDP Stack	CDP's solution requires technical expertise beyond the typical marketing user
✓ Journey Orchestration	CDP Stack	CDP orchestration is CMS-centric and does not support true multi-channel journeys

# Directory of Audited CDP Capabilities

For a full description of CDP capabilities please see the [RealCDP Audit Guide](#). Below is a brief description of each CDP capability reviewed in the RealCDP Certification Audit. To qualify as a RealCDP a vendor must fully support all Core CDP capabilities.

CAPABILITY	TYPE	DESCRIPTION
<b>Ingest Data</b>	Core CDP	Data ingestion and data capture capabilities for all data types
<b>Maintain Data</b>	Core CDP	Maintain and manage all required customer and demand-side data
<b>Store Historical Data</b>	Core CDP	Store all detailed historical and longitudinal data required by Users
<b>Unified Customer Profile</b>	Core CDP	Create and manage unified customer profiles
<b>Privacy</b>	Core CDP	Manage personal identifiers, consent & privacy management, privacy enforcement
<b>Share Customer Data</b>	Core CDP	Distribute and/or syndicate data wherever (and ideally whenever) needed
<b>Real Time Updates</b>	Core CDP	Capture, update, share, and decision data in real time
<b>Channels</b>	CDP Enhancement	CDP supported Channels and available Connectors to capture and distribute data
<b>Data Sources Supported</b>	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
<b>3rd Party Applications</b>	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
<b>Real Time Processing</b>	CDP Enhancement	Enhanced Real-time processing update capabilities (ideally in sub-second speed)
<b>Data Hygiene</b>	CDP Enhancement	Data scrubbing, filtering, standardizing, formatting, and matching capabilities
<b>End User Training</b>	CDP Enhancement	End User training, workshops, documentation, and educational materials
<b>Analytics &amp; Reporting</b>	CDP Stack	Report building and sharing for data, program performance and customer analytics
<b>Model Building &amp; Scoring</b>	CDP Stack	Model development and data scoring in support of targeting and decisioning
<b>Personalization</b>	CDP Stack	Customer Personalization solutions including tools, technologies, and techniques
<b>Journey Orchestration</b>	CDP Stack	Customer Journey Orchestration solutions for multi-touch, multi-channel marketing