2024

ZETAVATION

Identity, AI, and a Dash of Genius

ZETA

As the role of the CMO shifts to strategic growth drivers, legacy systems are finally being replaced by agile next-gen platforms that can rapidly respond to changing customer behavior. At the same time, Generative AI is transforming the role of the marketer, displacing tedious grunt work with strategic experimentation and execution. It's never been more important to invest in technology that helps you drive game-changing impact with your finite resources.

It's not enough to be "data driven" anymore. Everyone has more data than they know what to do with and it's usually locked away in silos collecting dust. To be successful, marketers need to be "intelligence driven," which requires a unified, real-time source of truth that can be activated at lightning speed. A shared intelligence breaks down barriers, unites teams, and enables faster decision-making to deliver sustained, breakthrough growth.

In this special edition of ZetaVation, we explore how the Zeta Marketing Platform (ZMP) is powering the shift from outdated legacy systems to AI-driven innovation. Marketers at every level can access unparalleled intelligence, simplify sophisticated marketing, and deliver outcomes that fuel top-line revenue growth.

Bridging the Data Divide:

Uniting Teams & Systems
with Zeta's AI

Marketing is becoming more challenging because data is not easily shared between teams or systems. Zeta's generative AI agents and tools solve this problem by working across silos to transform disparate, raw data into shared intelligence that helps marketers gain deeper insights, improve outcomes, and create impactful, human-centered experiences.

ZOE 2.0: Conversational AI Meets Workflow Automation

The Zeta Opportunity Engine (ZOE) now allows marketers to string together complex agent workflows with intuitive, conversation-based language. ZOE goes beyond basic "machine-learning" or bolt-on AI tools—it delivers real integrated intelligence that makes marketers' lives easier. Using a chat-based interface, marketers can activate their data to create audience segments, generate custom reports and dashboards, and even build entire campaigns with a simple, spoken prompt. Just tell ZOE what you need and let AI handle the rest.
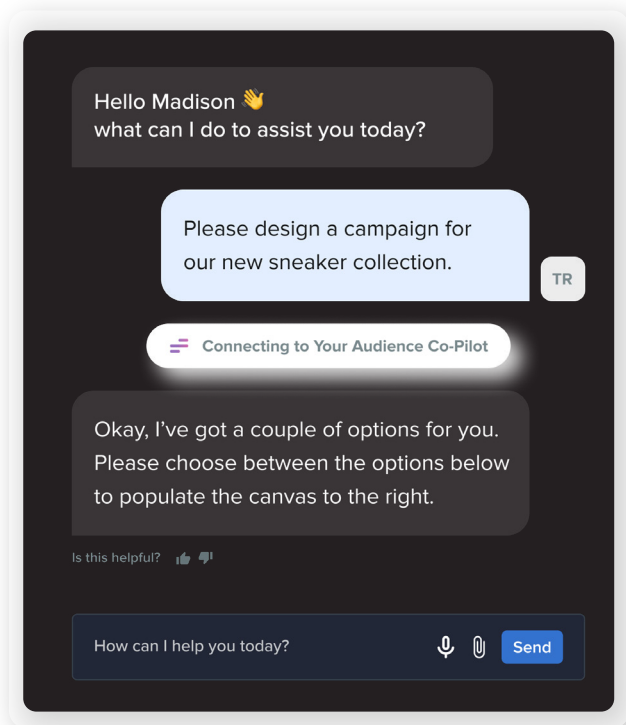
Prompt ZOE to complete tasks such as:

- "Generate a custom report on last month's campaign performance by channel."

- "Create an audience segment of frequent buyers who haven't purchased in the last 90 days."

- "Forecast the ROI of increasing our budget on social media by 20%."

- "Analyze the top-performing creative assets for our latest product launch."

- "Identify the best time slots for running our ad campaign on CTV."

Bring Your Own Model

Maximize the value of your existing AI investments by using Zeta's "Bring Your Own Model" (BYOM) feature. With BYOM you can plug in home-grown or external data, with zero-ETL integration, to generate unique customer insights based on your first-party data. Take your customer profiles to the next level by adding specialized or proprietary data points— like propensity scores, LTV predictions, or loyalty indicators to profiles within the ZMP. Once integrated, use the data to generate custom audiences and execute experience-based decisioning to drive growth.

- **Build smarter campaigns:** Use your own models to inject proprietary company data directly into customer profiles, allowing you to build a single view of each user.

- **Create more strategic segments:** Segment audiences based on criteria unique to your business, such as CLTV, for more targeted and effective campaigns.

- **Strengthen your insights:** Create a single source of truth that enables better Intelligence, more informed decision making, and better outcomes.
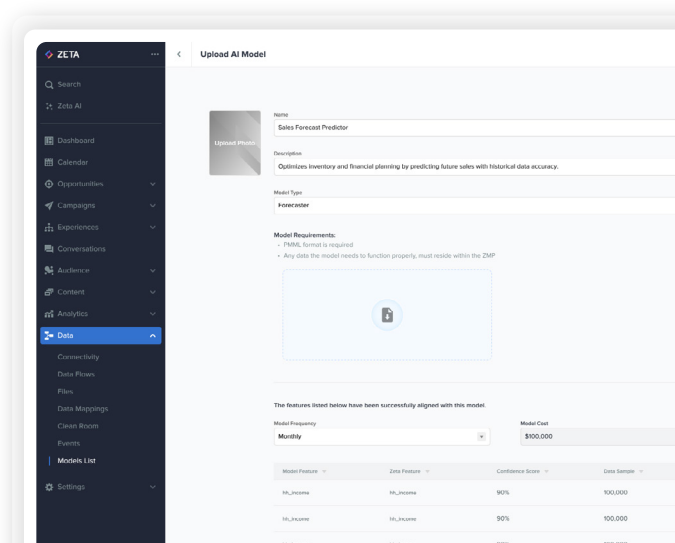
Audience Copilot: Build Smarter Audiences with AI Agents

Audience Copilot is an AI agent that helps marketers leverage both first-party data, and the Zeta Data Cloud, to build and optimize audience segments. Using a chat-based interface, marketers can describe their targeting goals in natural language and let AI do the rest. As targeting goals evolve, Audience Copilot automatically adjusts audience segments to align with the updated objectives and provides recommendations to improve performance.
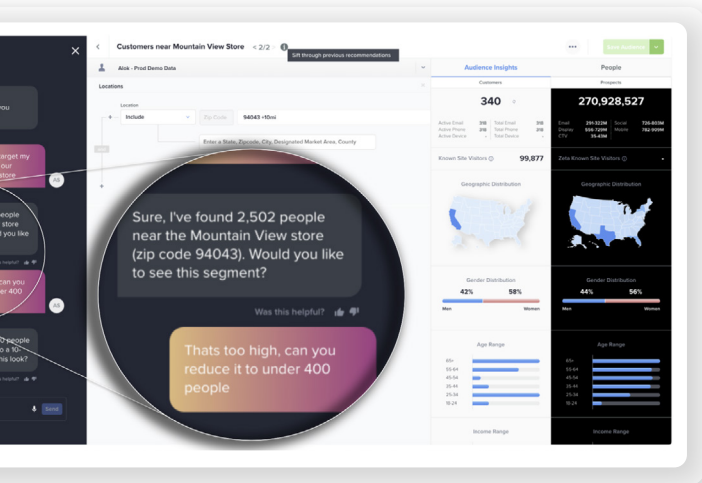
- **Develop targeted segments:** Build hyper-targeted audiences in seconds using an intuitive chat-based interface.

- **Adjust targeting on-the-fly:** As your campaign goals shift, Audience Copilot automatically recalibrates your segments to stay aligned with your objectives.

- **Test and improve audience strategies:** Test different audience configurations using AI recommendations to discover what works best.

Workflows: AI Agents in Perfect Harmony

Journey creation just got smarter with Zeta's AI Agent Workflows. Now marketers can sequence and combine AI agents to refine and accomplish complex objectives. Instead of relying on separate tools for tasks like building subject lines, selecting audiences, and predicting send times, you can now put agents to work in seamless workflows. With an extensive library of pre-built and customizable agents, marketers can harness AI to automate the creation of personalized, end-to-end customer journeys that run with the push of a button.

- **Put journeys on autopilot:** Create custom journeys by combining agents that intelligently adapt content, channels, and timing based on real-time behavior.

- **Streamline multi-step campaigns:** Save time and simplify campaign creation by using agent workflows to handle every step of the setup process, from audience segmentation to performance tracking, all triggered with a single command.

Your Data,
Your Way

Zeta's suite of data and identity management tools supercharges transparency, flexibility, and addressability across your organization. By unifying first-party data from every corner of your tech stack, and activating it in real time, Zeta fosters stronger collaboration between the CMO and CIO. This powerful unified approach allows marketing and IT teams to work together more effectively to streamline data integration, bolster cybersecurity, and drive strategic business growth through connected customer experiences.

Identity Resolution: Planning for a Cookieless Future & Beyond

With Zeta's identity resolution framework, companies already had a competitive advantage, consolidating fragmented customer records into a single, accurate profile. Now, identity resolution is even better—addressability on these profiles is future-proofed with our new cookieless and identity solutions.

Once profiles are linked to our stable identifier, they can be enriched with additional attributes and signals to build a more complete, real-time understanding of each customer, enabling marketers to build more accurate customer profiles, deliver individualized experiences, and make informed, data-driven decisions.
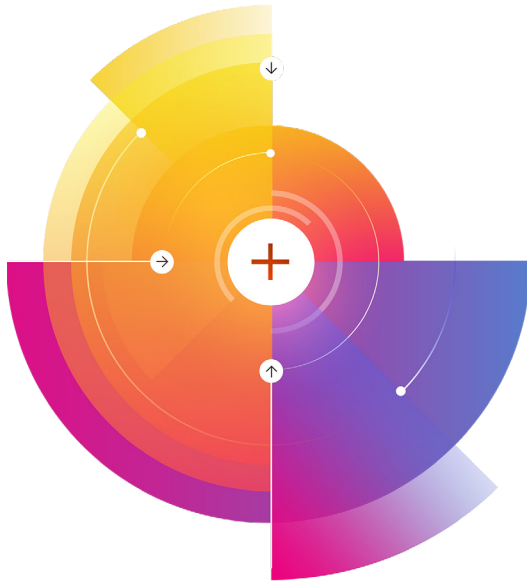
- **Maximize identification & match rates:** Identify, recognize, and attribute visitors using Zeta's cookieless, encrypted stable identifier, unlocking richer signals about each user to address your best prospects and customers in your top channels.

- **Deliver seamless cross-device experiences:** Identify users across devices and deliver consistent, personalized messaging as they switch between platforms.

- **Boost conversions with remarketing:** Increase known audiences and reconnect with site abandoners by targeting them in key channels to drive re-engagement.

- **Expand reach with lookalike audiences:** Identity more of your best customers with higher match rates for broader prospecting and growth.

# Zeta Clean Room: Drive Better Business Outcomes Without Engineering Support

Zeta Clean Room is a privacy-centric data sharing solution that maximizes the value and addressability of first-party data. A new approach to traditional clean room infrastructures, the ZMP's native clean room can be deployed in a snap, without engineering support—reducing setup costs and accelerating your time to value. By offering an intuitive UI along with a secure, controlled environment that streamlines data unification, Zeta Clean Room makes it easy to optimize the customer journey and build impactful brand experiences.

- **Security and peace of mind:** Safely and anonymously share data in a secure, frictionless environment. Data never leaves the clean room from share to activation.

- **Accuracy and accessibility:** Provide seamless, timely data access without compromising privacy and security. You decide what data to share and when to revoke access.

- **Knowledge is power:** Enrich your first-party data for expanded customer insight and marketing applications.
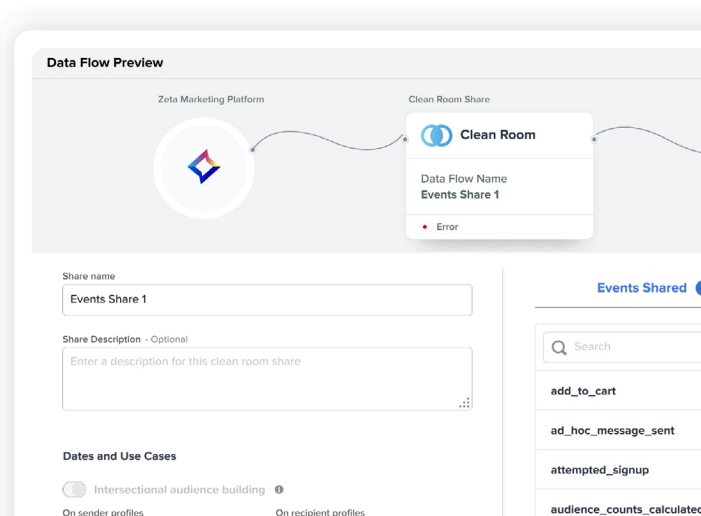
Zero Copy Data: Instant Access, Seamless Integration, Zero Transfers

Now you can access your data without complicated ETL processes. Zeta's Zero Copy Data architecture enables lossless data exchange between your data warehouse and the ZMP so you can accelerate time to insight by removing the delays and risks associated with data replication. Zero Copy also simplifies compliance and eliminates transfer costs so your team can focus on strategy rather than data management.
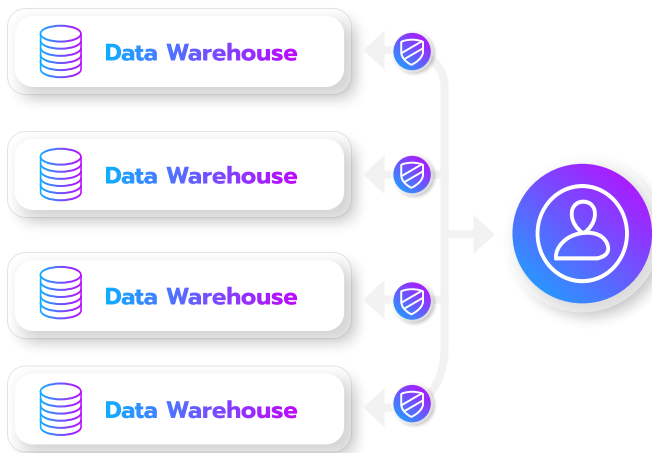

- **Real-time marketing analytics:** Instantly access unified data for real-time campaign analysis without waiting on IT.

- **Cost-efficient data management:** Bypass traditional ETL processes to cut data transfer costs, reduce storage needs, and avoid synchronization errors.

- **Ironclad security and compliance:** Customer data never leaves your data warehouse, making it easy to avoid duplication risks and adhere to strict privacy regulations.

CMO Dashboard: The Metrics that Matter Most to Marketing Leaders

The CMO Dashboard gives marketing leaders a bird's eye view of their company's overall health across five key vectors: industry, competition, brand, customer, and campaign performance. By consolidating and transforming raw data into actionable intelligence, the dashboard creates a real time single source of truth that simplifies decision-making. AI-based recommendations combined with quarterly and annual reviews make it easy for executives to keep their finger on the pulse of their brand, customers, and industry to drive growth with defensible data-driven strategies.

5 metrics to quantify brand health:

- **Industry:** Tracks how the industry and category are trending year-to-date and year-over-year at a macro-level.

- **Competitive:** Compares brand performance against key competitors to see who's leading or falling behind in key markets.

- **Brand:** Provides a clear picture of where your brand is excelling and where attention is needed.

- **Customer:** Analyzes customer behavior across segments to highlight overall and segment-specific performance.

- **Campaign:** Measures campaign performance against key benchmarks like plan, targets, and last year's results.
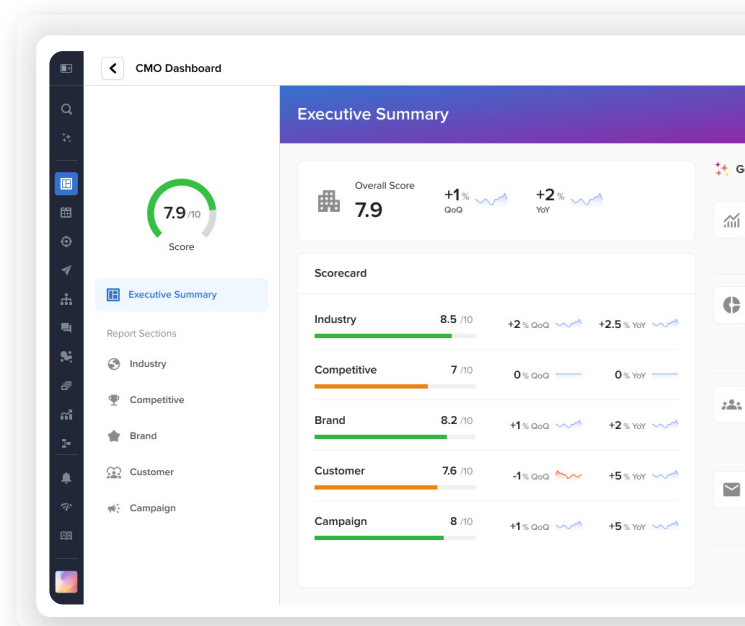
Connect the Dots for Smarter Marketing

Marketers today need easy-to-use, impactful tools to deliver consistent, individualized experiences across all channels. Zeta's omnichannel capabilities combine AI-driven insights with an intuitive toolset that helps marketers meet their customers where they're at when it matters most.

Visual Composer: Build Campaigns with Generative AI and Codeless Personalization

Visual Composer helps marketers build sophisticated, individualized campaigns in minutes. Leverage the codeless editor to personalize individual campaign elements or use AI agents to generate entire campaigns from a simple prompt. For example, you can tell Visual Composer to "Create an email campaign for a back-to-school sale that promotes 30% off backpacks," and with the press of a button you'll have a code-free template that's ready to be customized and deployed.
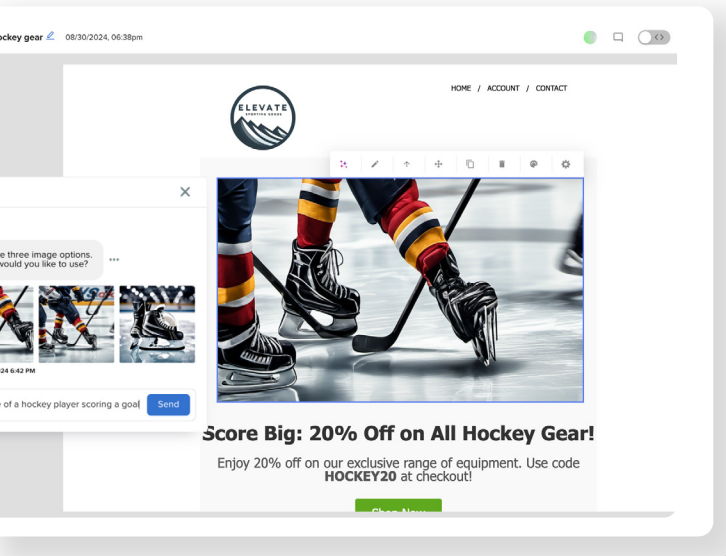

- **Use AI agents to customize templates:** Leverage generative AI agents to improve copy and change images using simple natural language prompts.

- **Build the perfect message:** Easily tweak and test different versions of your messages to find the one that delivers the best experience for your audience.

- **Get up and running fast:** Visual Composer taps into your existing data and assets, seamlessly integrating into your workflow so you can start creating in minutes.

# Experiences & Campaigns: Accelerate Decision-Making with Effortless Experimentation

Test and optimize more often with our suite of experimentation capabilities. Now marketers can easily create A/B/n and multivariate tests in minutes using an easy-to-navigate interface and refine experiences on the fly. Experiments adjust in real time as more data becomes available and can provide more accurate forecasts for expected node performance. Optimize every aspect of email, social, and display campaigns as well as landing page content and multi-stage customer journeys, all from a single UI.

- **Fine-tune your content:** Quickly test different versions of your campaigns and optimize for the best-performing channels and messaging in just a few clicks.

- **Improve customer journeys:** Experiment with different timing and channels, while seamlessly merging branches back together to create smoother, more effective experiences.

- **Make insights accessible to everyone:** Give non-technical teams the power to run and manage experiments, check forecasts for nodes, and compare past performance to predictions, without relying on developers or complicated tools.
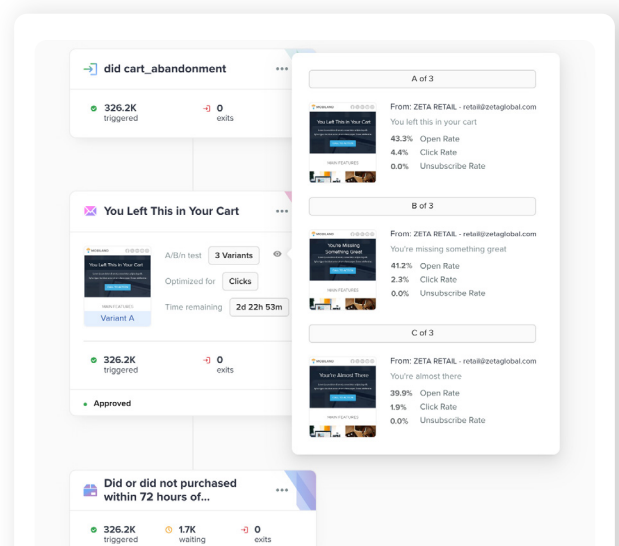
Mobile: Merge Identity and Intelligence to Increase Engagement

Zeta's mobile suite empowers marketers to build hyper-targeted, individualized experiences across SMS, MMS, push, and in-app messaging. With seamless SDK support for both iOS and Android, Zeta connects identity and intelligence to predict customer actions and optimize campaign performance. By integrating mobile activity with additional signal and enrichment data from the Zeta Data Cloud, marketers can tap into real-time behavioral insights, activate smarter audience segments, and deliver targeted campaigns that resonate across every channel.
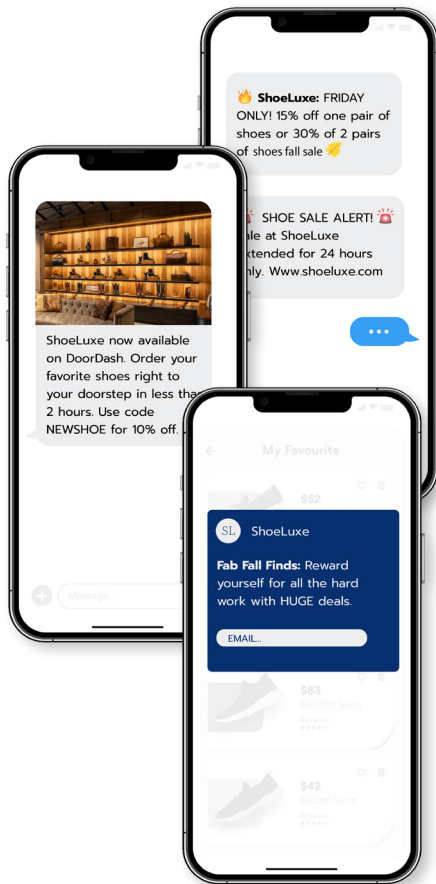
- **Anticipate what customers want:** Merge mobile engagement data with additional signal and enrichment data from the Zeta Data Cloud to predict customer behavior and send targeted push notifications and in-app messages that align with what users are likely to buy next.

- **Refine your campaigns in real time:** Monitor mobile interactions as they happen, letting you quickly adjust your strategy with AI-driven insights that help improve your audience targeting and overall campaign performance.

- **Build smarter audiences:** Apply mobile behavioral data to customer profiles to create precise audience segments and deliver targeted campaigns that increase engagement.

The Zeta Marketing Platform Helps Marketers Drive Profitable Customer Growth

As the role of the marketer continues to shift towards driving growth, it's critical to embrace smarter, more connected technology to fuel better intelligence and activation. Zeta is the only platform that is made up of a CDP, ESP, DSP, and the largest private, unwalled, data cloud which gives marketers the tools they need to be successful.

Whether you're using the ZMP as your unified marketing platform, or it's connecting the dots to extract more value from current technology investments, the AI-powered ZMP is at the forefront of the next generation of marketing technology.

Interested in learning about the to learn more about the innovations in this article?
Contact your Zeta representative for more information.

Not a Zeta customer? Request a demo and learn how we're helping marketers activate their data to drive more connected customer experiences.