

By BARTON GOLDENBERG

‘Data On-Boarding’ Can Make Customer Profiles Whole Again

A new technology links customers’ online and offline data, giving you a single, comprehensive view

A KEY DELIVERABLE in every successful CRM initiative is the creation and implementation of holistic customer profiles, which pull together data from customers’ online and offline (i.e., nondigital) histories. Creating holistic customer profiles has become much more challenging given the proliferation of digital data, but a technology called “data on-boarding” can help enhance holistic profiles by seamlessly integrating both kinds of customer data. To illustrate how data on-boarding works, let me apply it to a business challenge one of ISM’s clients is facing.

The client, a global manufacturer of luxury automobiles, wants to build comprehensive profiles out of online and offline customer insights. For existing customers, it gathers information from car purchases, service records, car dealerships, automotive industry databases (e.g., lease expiration dates), and demographic databases. Integrating website and social media behavior into the profiles remains its biggest challenge. Here’s why: Customers and especially prospects do not always provide the car manufacturer with their name or email address, which the company needs to add data on online behavior to profiles and engage more meaningfully with its customers and prospects. The company struggles, for example, to tie a customer’s or prospect’s “online identifier” (e.g., a cookie ID) or a Facebook name back to that individual’s actual name and email address.

Here’s where data on-boarding tools come into play. Data on-boarding seamlessly integrates online and offline data to create a single customer record. Here’s how it works:

Step No. 1: Gather the data. Data on-boarding tools compile customer data from online sources like websites and social media and offline sources like sales data or contact center calls.

Step No. 2: Perform identity recognition. The tools next apply identity recognition technology to map online and offline data to a single individual. The identity recognition software knows via Cookie IDs, mobile device IDs, and so on which sites or social media communities the individual has visited. Once the individual has revealed his name, physical address, email address, or a phone number somewhere on the internet, the

identity recognition software then goes to work and links the individual to each of the cookie IDs and/or mobile device IDs that the individual created online.

Step No. 3: Merge data into a holistic customer profile. The single, merged customer record is now ready for use in holistic customer profiles. Companies can apply their analytics tools to the data to segment their customers and prospects, create look-alike models for ad targeting, determine appropriate offers, suggest next best offers, and so on.



Imagine the power of having all online and offline customer data in one holistic customer profile so that a company can more effectively engage with targeted customers in a variety of ways. This could be through traditional modes such as print, catalog, direct mail, radio, television, and telemarketing/telesales; the digital modes we’re accustomed to, including email, website, mobile, search, social, and video; and whole new technology platforms, such as wearables, visual and augmented reality, personalized video, addressable TV, and more.

In addition to enhancing customer engagement, data on-boarding allows companies to more easily measure the impact of their marketing and sales efforts. ISM’s client, the global car manufacturer, will soon be able to tightly link online and offline car-related activity to an actual car purchase, which will allow it to fine-tune marketing and sales efforts along with its go-to market strategy. How cool is that?

The foundation of a successful integrated customer-centric strategy, which every company needs in today’s digital world, is the holistic customer profile. Simply put, a company cannot build a successful integrated, customer-centric strategy without getting this foundation right. With data on-boarding available from multiple software vendors, now is the time for you to learn and apply this wonderful new technology to drive your holistic customer profiles to a whole new level. 

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