

CHECKLIST

360 CUSTOMER VIEW

HOW TO ACHIEVE A TOTAL 360 CUSTOMER VIEW

Leading organizations are seeking a single, accurate source of truth across their entire business. Only by unifying data from all sources to create a 360 profile can organizations gain the accurate insights to help create more impactful campaigns. Yet what does a “single view of customer” really mean? What was once a legitimate goal for businesses to achieve has become a buzzword that everyone claims they can achieve. Use this comprehensive checklist to determine who can really meet the requirements meet the requirements for a true 360 customer view that can help turn customer insights into revenue.

CRITICAL CAPABILITIES: DESCRIPTIONS AND BENEFITS

	YES	NO
<p>▶ Identity Resolution</p> <ul style="list-style-type: none"> – Unified, deduped, single view of customer stitched from multiple different systems for greater insight to optimize marketing efficiency and spend. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Real-Time Data Ingestion</p> <ul style="list-style-type: none"> – Web hooks to ingest data first party data from online systems instantly via real-time connectors and APIs. Offline systems are uploaded on a daily basis, 5-10x faster than manual batch uploads. – Increased efficiency of marketing campaigns of product offers using most up to date customer activity possible. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Online and Offline Stitching</p> <ul style="list-style-type: none"> – Unify data types into single data model to view all customer activity. – More holistic view of customer behavior across channels to accurately determine customer lifetime value. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Data Cleansing</p> <ul style="list-style-type: none"> – Merge duplicate profiles into a single view by mapping commonalities in profiles. Standardizes contact records including email address and phone numbers. Genderizes names, validates postal addresses, and any identifiable fields. – A more accurate customer view that reduces amount of raw records and enables more efficient customer communications. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Cookie Back-Stitching</p> <ul style="list-style-type: none"> – Use cookies to track behavior and unify customer transaction, profile, or event data across multiple sessions and channels. – Improved insight on customer engagement and conversion. Every single customer interaction is tracked and logged into a customer “journey” view to understand which actions and offers compel customers to convert. 	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO
<p>▶ Non-Destructive Deduping</p> <ul style="list-style-type: none"> – Maintain all raw records that are stitched together, allowing for a view of all ingested profiles. – Increased accuracy of matching new customer data when ingested into the platform. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Probabilistic or Fuzzy Matching</p> <ul style="list-style-type: none"> – Intelligent ML algorithms analyze customer activities across channels to a unified customer profile even if there is only a partial name, address, or email match and then automatically unify those profiles together. – Eliminates inconsistency between customer records for a more unified database. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Cross-Brand Reconciliation</p> <ul style="list-style-type: none"> – Evaluates customer behavior across multiple brands and unifies them into single profile. – More accurate customer lifetime value. Improved targeting capabilities to deliver optimal messages and offers by individual brand or across brands. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Householding</p> <ul style="list-style-type: none"> – Gain insight to behavior of customers in the same household by calculating household level statistics (household spend, last purchase date, lifetime number of purchases). – Improved targeting with ability to use household level statistics to choose the best recipients for offers such as direct mail. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Credit Card Hashing</p> <ul style="list-style-type: none"> – Searches for matching credit card numbers from profiles and transactions and automatically stitches profiles together. – More accurate lifetime value so you can match anonymous actions with known, to more effectively analyze customer spend. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Configurable Rules</p> <ul style="list-style-type: none"> – Create custom rules and configure existing attributes. – Flexibility to bring in new use cases and KPIs, handle complex issues, and bring custom attributes into profiles. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Profile API</p> <ul style="list-style-type: none"> – Customer profile available via API or UI in real-time from database that is elastically searchable and updated in real time. – Anyone across the organization can access the most up to date customer information in the manner of their choosing. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Full Master/Child Record View</p> <ul style="list-style-type: none"> – CDP maintains all raw customers records to show you all the places that information exists in your martech environment (ESP, POS system, ecomm platform, loyalty system) so you can be compliant and correctly delete all instances. – Ensure compliance by tracking all unique profiles so you can correctly manage all records across systems. 	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ Anonymous Data Capture for Eliminated Person Records</p> <ul style="list-style-type: none"> – Continue to capture data on profile once it has been “forgotten” in the system. – GDPR and CCPA compliance while still allowing understanding of user behavior across digital ecosystem. 	<input type="checkbox"/>	<input type="checkbox"/>