

How to achieve the Single Customer View

The crucial step towards data-driven customer first marketing



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1. The importance of the Single Customer View

Modern marketing is data driven. Consumers are creating huge amounts of data in their everyday lives - data that marketers can use to their advantage.

However, those self-same customers are increasingly demanding a highly personalised experience.

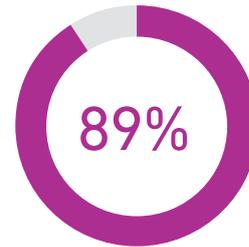
Customer service is the fiercest battleground in marketing today and a brand's ability to utilise the data available to improve each customer's experience will decide who will succeed and who will stumble and fall.

The concept of the Single Customer View (SCV) has been around for a number of years, yet it has never been as important as it is right now. An SCV is an aggregated, consistent and holistic representation of the data known by an organisation about its customers.

The advantage to an organisation of attaining this unified view comes from the ability it gives to analyse past behaviour in order to better target and personalise future customer interaction.

However, despite the evident importance of achieving a Single Customer View, for many brands it remains seemingly just out of reach.

In a recent survey of 1,000 global marketers 89% said they have experienced difficulties creating a Single Customer View.¹



have challenges creating a single customer view

Top Challenges include:



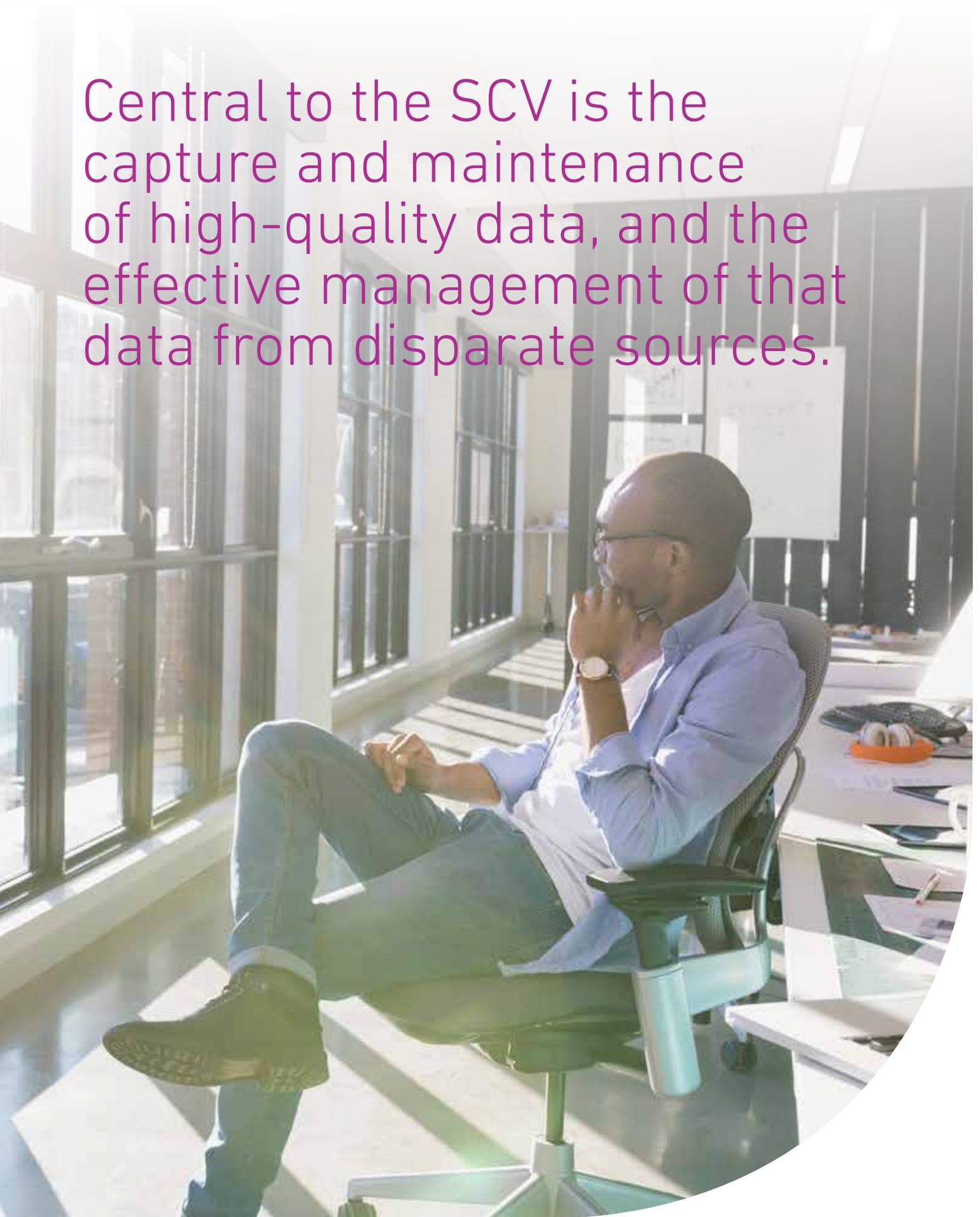
In addition, the same survey revealed the lack of a Single Customer View was the biggest barrier to establishing a cross-channel marketing strategy.

In spite of the difficulties it's important not to despair. Yes, the SCV is a complicated and difficult process, but it is so critical that the pain has to be endured. There is cause for optimism though – as modern technology becomes more and more sophisticated the path to a SCV is getting easier and easier.

This paper splits fact from fiction, delves into the benefits of a SCV and provides practical advice on how to turn the Single Customer View concept into a marketing reality.

¹ 2015 Digital Marketer Report - experian.co.uk/digital-marketer-report-2015

Central to the SCV is the capture and maintenance of high-quality data, and the effective management of that data from disparate sources.



2. How to create a Single Customer View – the technical perspective

A Single Customer View is a readily accessible summary of a customer relationship across different products, brands, businesses and channels which enable personalised engagement.

Central to the SCV is the capture and maintenance of high-quality data, and the effective management of that data from disparate sources.

This relies on the creation of linkages between different data sources, or to put it another way, bringing a customer's relationships together — usually by matching name, address and date of birth, and applying a unique customer identifier (often described as a customer PIN) to each individual. This identifier is then appended to every item of data relating to that customer — allowing all data on an individual customer to be matched and brought together to create a single view or record of that customer.

It's important to remember, however, that attaining the SCV is not an end in its own right —the Single Customer View alone will not suddenly transform your marketing effectiveness. The actionable insight you need to engage with the right message at the right time on the right device only comes from the application of analysis, technologies and smart thinking. By using data to link customers' on and offline identities, the Single Customer View becomes the platform on which you can build all your cross-channel marketing activity.



“89% of brands have difficulties creating a Single Customer View”

- 2015 Digital Marketer Report

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3. A win-win situation for brands and customers

Modern marketing is all about customer experience. A perfect experience leads to customer loyalty, retention and advocacy.

A Single Customer View provides significant benefits to a brand's ability to interact with individual customers. Enabling that brand to tailor the experience to suit each customer and providing as positive and helpful an experience as possible.

And of course - there are also some significant business benefits - what's known as an old fashioned win-win situation...



Marketing capability

- Tailored communications
- Understanding customer needs, wants and preferences
- Understanding of individual's situation
- Merging of understanding into customer service processes
- More beneficial relationship based on insight



Customer benefit

- Useful information about things they are actually interested in
- More likely to get the right product at the right time
- Useful information relevant to their situation (debt, moving house, baby being born)
- Seamless, helpful service based on need requirements and preference
- Customers derive greater value from the relationship, with products that are relevant — promoting customer advocacy and loyalty



Business benefit

- Higher sales and increased customer loyalty
- More targeted product development
- Prioritisation and more effective tailored communications
- Agents see a customer's history, enabling rapid and appropriate actions for enhanced relationships and brand perception
- Valuable customer insights generate greater value per customer through cross and up-selling — and customer retention

4. The top challenges to creating a Single Customer View

As we have discussed, 89% of companies have difficulty creating a Single Customer View.² In that same survey we asked what the biggest barriers were.

The top challenge highlighted by survey respondents was poor data quality (cited by 43 per cent of marketers), followed by siloed departments (39 per cent) and the inability to link different technologies (37 per cent). In the following sections we'll take a look at how marketers struggling with these issues can start to overcome them.

4.1 Poor data quality

Data quality is critical to marketing efforts. Without accurate and reliable data an SCV simply won't be possible. Before you start working towards achieving an SCV you must make sure your data is in a good place.

Consider these five steps:

Get involved in the data collection process

Marketers need to understand how their customer data is collected. A high degree of inaccurate information can have a dramatic impact across the entire organisation, especially for marketers as they look to drive customer engagement and revenue.

Marketers should align with the data owners across their organisation to better understand the data-collection process and how it can be improved to prevent human error. Encourage the implementation of validation software at key capture points and try to enforce consistent data-governance standards around the business, making it easier to consolidate and maintain data over time.

Find the right technology

The volume of data is so high that organisations can't simply manage it with manual processes. They need technology to ensure accuracy of information. Luckily, there are many vendors in the market today that can help with data-quality technology.

However, marketers need to take care in finding the right fit for their organisation. There are several factors to consider when evaluating vendors, including strategic fit for the organisation, usability/accessibility of the suite of tools, the completeness of the data-quality tool - including in cookie-less environments - and the ability to easily test these tools to ensure they work in the environment.

Encourage a central data-management strategy

Marketing should be an agent of change within an organisation. A central data-management strategy is the only way to make sure organisations have a single and complete view of each customer within their first-party data. Maintaining that complete view internally and then pairing it with external, third-party data can create an incredibly powerful and actionable view of each customer to enable many marketing initiatives.

Larger organisations may consider adding a Chief Data Officer or a Chief Marketing Technology Officer to oversee a centralised data strategy.

Invest in analytical talent

The tools and skills for successful marketing have changed. Much depends on an analytical skillset to mine and analyse data. Be sure to invest in analytical talent to help understand key customers, marketing campaigns and response attribution better. If you don't want to consider hiring new talent try up skilling your current teams. Better yet - work with data experts who have plenty of experience.

Monitor information over time

Data becomes out-dated quickly. It is important to monitor information over time to ensure its on-going accuracy. Marketers can either use monitoring technology as part of their broader data-management strategy or keep track of campaign response rates, such as email bounce or returned mail, to get an idea of contact data accuracy.

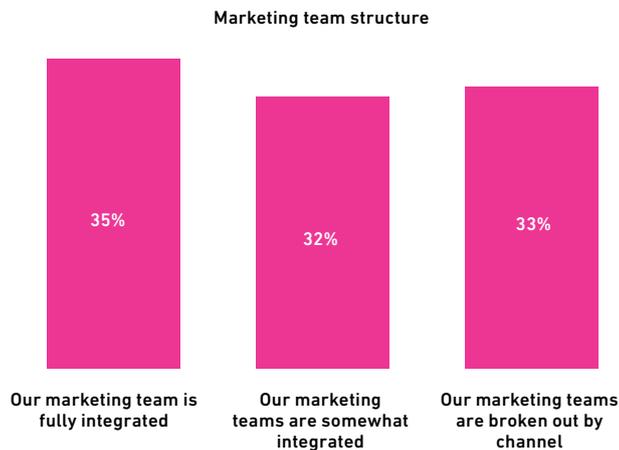
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4.2 Siloed departments

A fully integrated marketing team is centred on the customer rather than a channel, taking a progressive approach to meeting the demands of the modern day consumer.

An aligned team should be aligned by persona and be responsible for marketing to that customer segment regardless of channel. A marketing team broken out by channel on the other hand, consists of separate teams — email, mobile, social, website, etc. — each executing and measuring performance individually. This does not lend itself to a customer-centric outcome.

As the graph below indicates³, most marketing teams are not fully integrated.



So how do you move towards a fully aligned approach? The best piece of advice is not to feel overwhelmed by what may seem like a complete overhaul.

4.3 Inability to link different technologies

With more channels come more technologies. Different channel teams will be using different technology to communicate with their customers. How do marketers join those together? It's a tough one.

The solution has to be carried out alongside your attempts to break down the silos and it involves transitioning all your comms into one location. How can you treat customers as individuals rather than individual touch points if the communications you are sending out are not connected and co-ordinated from a single location? Your data needs to be joined up and so does your technology.

Do right now

Physically sit your teams closer together. Get rid of some of the physical walls between teams before you start on the virtual ones

Combine teams when planning a campaign

Always include more than one channel on every campaign

Involve your data team in your customer journey planning

Start this year

Look at your KPIs for your teams

Do you have email teams targeted on engagement and digital advertising teams targeted on conversion?

Try and align your KPI's and targets so that all your teams are incentivised to pull in the same direction

Then go and tackle your infrastructure and systems so it reflects those decisions

This is again a large project so start as before by ensuring your KPIs and teams are aligned and then start considering how to join up your tech. Most of all, marketing technology needs to be considered as a strategic asset and decisions on what is required and what isn't need to be taken on a strategic level. There might be a lot of money available to spend, but you simply cannot have everything.

³ 2015 Digital Marketer Report - experian.co.uk/digital-marketer-report-2015

5. Tips to make the journey to a SCV easier

Implementing a Single Customer View is one of the fundamental success factors of a successful and competitive company. It demands cultural and systemic changes if the customer is to drive business priorities and marketing strategies.

The basic building block of the operation is that the emphasis of the entire business has to be focused on the customer.

This is a highly specialised area and demands equally specialised input, but the following pointers will help businesses to achieve an SCV:



1. Be ready for business-wide change: this isn't a simple initiative

The SCV crosses all customer data sources within a business and may cut across business units as well as channel functions. The benefits may be spread across the business however; equally the effort has to come from across the business. Buy in from all parties is crucial.



2. Senior ownership

While this isn't a top down process, it needs championing at a level of seniority that's sufficient to drive change across the business.



3. Technology driven

While the benefits are business-wide, I.T. is critical to success and must be empowered to deliver. Without full I.T. buy-in every SCV project is doomed to fail. Get them on board and make sure they understand what you are trying to achieve and the benefits it will provide them.



4. Focus

The Single Customer View is an enabler, with sometimes hard to see direct benefits, so focus is needed to ensure it doesn't slip down the list of priorities.



5. Clear objectives

Good project management and a clear definition of goals, rules and data sources are required.



6. Know where you are now

Conduct an honest appraisal of current data quality capabilities and how to improve them.



7. Resources that match demands

Issues tend to arise from lack of funding or resource —so ensure the Single Customer View project is planned, budgeted and resourced adequately. Use external suppliers where appropriate.



8. Scope

Poor project scoping can be an issue. Prioritise key data feeds in the initial phases whilst allowing for new data feeds to be integrated at a later stage.



9. Proper processes

The wrong implementation processes, lack of buy-in to the changes in operational units and having to deal with legacy applications can all impede progress, so ensure that these are anticipated.



10. Testing

Testing is important. Making sure processes are robust is standard best practice and insufficient testing should be avoided — this may be because of time constraint, lack of planning or lack of resource within the business – regardless, make sure testing new rules and data linkage is included in the earliest stages of planning.

6. Next steps

Moving from the Single Customer View concept to the business reality is a complex process, but one that ultimately provides companies with clarity and simplicity. A working Single Customer View provides tangible short-term and long-term benefits for the business but more importantly it helps that brand provide a better service to its customers.

However, it is not a journey that should be undertaken alone, no matter what the size of the organisation attempting it.

Never fear though, there is help out there. Experian Marketing Services has extensive experience in the management of data and the rules and logic required to create linkages within a SCV application, developing software such as Experian Link to do just that. We can also draw on our own data assets to support Single Customer View and provide full cross-channel insight — including social media, email, mobile and cookies.

Understanding the need for greater customer engagement is the first stage in the journey to a Single Customer View, and the next is to talk to Experian Marketing Services — we will be with you every step of the way.

About Experian Marketing Services

Experian Marketing Services is the leading global provider of consumer insights, targeting, data quality and cross-channel marketing. We help organisations intelligently interact with today's empowered and hyper-connected consumers.

By helping marketers identify their best customers, find more, and then coordinate seamless and intelligent interactions across the most appropriate channels, Experian Marketing Services can deepen customer loyalty, strengthen brand advocacy and maximise profits.

Learn more at www.experian.co.uk/marketingservices



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