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# The Seven Imperatives for Great Customer Data Management

ANALYTICS · BUSINESS APPS · CLOUD · INFRASTRUCTURE · SECURITY

## How do your customers talk about their experiences with your company, your products, and your employees?

Think for a minute about the feedback or reviews you've seen on social media or heard from customer support and sales. If you're feeling warm with pride, your company is hitting its marks. On the other hand, if you like you're in the hot seat maybe due to some well-aimed complaints or because you don't know what they're saying it's time to regroup and recalibrate so that you can deliver memorable, conversation starter experiences.

In the ongoing effort to create these types of customer experiences, we've seen rapid investment in new technologies and applications for sales, customer service, and marketing. Marketers alone rely on an average of 65 applications to run their operations.

On the face of it, all these new applications are helpful. They offer new ways to automate and scale complex processes like lead qualification. New approaches to connecting a growing number of diverse channels. And even existing disciplines like personalization. The potential is huge.

But this rapidly expanding technology landscape has given rise to a host of new challenges:

- Application-enforced silos fragment your view of customers

- Technological barriers between channels and regions prevent cross-channel consistency
- Competing versions of the truth sap the confidence out of decision-making
- Channels and departments that do not work together and degrade customer interactions

The result? A fractured customer experience, disillusioned customers, paralyzed decision-makers, and powerless employees.

Worst of all, brands think they deliver a great customer experience, even though **consumers disagree**.<sup>1</sup>

This eBook aims to demonstrate three things:

1. The root cause of customer experience chaos is a lack of accurate, clean, relevant data. Delivering a great customer experience, repeatedly and at scale, will be impossible without this type of valuable data.
2. Additional investment in applications alone isn't going to solve this problem. What's needed is intelligent data management.
3. Managing data intelligently is a journey that includes acknowledging your data is a mess and making a commitment to getting your data right. Fulfilling this quest demands both intelligent data management solutions and elite professional services with deep data management expertise.

To get you moving forward on the journey, let's start by outlining what's going wrong with customer experiences and suggest seven crucial steps to make things right.

“ *Brands think they provide great customer experience, consumers disagree* <sup>1</sup>

– Graham Charlton, Econsultancy, April 15, 2015



<https://econsultancy.com/blog/66326-brands-think-they-provide-great-customer-experience-consumers-disagree/>

## Portrait of a fractured customer relationship

Let's look at the symptoms of a broken customer relationship and the missing pieces each symptom reveals.

**Symptom:** Your customers receive offers for products they already own

**Diagnosis:** Disconnected order management and marketing campaign systems

**Symptom:** Your customers get upbeat marketing messages even while they're in the middle of a heated customer service issue

**Diagnosis:** Disconnected marketing and customer service systems

**Symptom:** Loyal customers who purchase on your ecommerce site get treated like brand new customers in the store

**Diagnosis:** Disconnected data in e-commerce and instore systems

**Symptom:** Your customers buy a product online, but can't return it in the store

**Diagnosis:** Incomplete data in in-store systems

**Symptom:** Your customers start their purchase process on their phones but have to restart the entire process again on their laptops

**Diagnosis:** Siloed customer data across mobile and e-commerce channels

**Symptom:** Your prospects get badgered by multiple sales reps from different parts of the business — all selling the same product

**Diagnosis:** Multiple records of the same prospect profile aren't consistent across channels

**Symptom:** Long-time customers have to answer the same set of questions every time they talk to customer service

**Diagnosis:** Limited profiles in customer service system

**Symptom:** Your customers update their address information on your website, but your sales and customer service applications still don't reflect it

**Diagnosis:** Customer data isn't updated across application silos.

**Symptom:** Your customer service agents don't know the irate customer on the phone has had the same issue three times before

**Diagnosis:** Incomplete customer data across too many siloed systems

**Symptom:** Your marketing analysts take weeks to give you a reliable list of your top 500 customers and what products they bought across lines of business, channels and regions

**Diagnosis:** An inability to reconcile fragmented, inconsistent customer data sources efficiently and reliably

**Symptom:** Your salespeople do not trust their CRM to give them a complete view of every customer

**Diagnosis:** Valuable customer data from other systems is not integrated with the CRM system

**Symptom:** Email bounce backs, returned mail, and frustrated salespeople because your emails, addresses and phone numbers are wrong

**Diagnosis:** No email, mailing address or phone number verification

By now, the pattern should be clear — customer experiences break down when the data in different systems isn't clean, consistent, and connected. Put another way, they break down when you don't have great data.

## Beyond the single customer view: Introducing the next-generation 360-degree view

CRM applications, marketing automation tools, and call center systems all promise some variant of a 360-degree view of the customer. But the most any one application can offer is a single view of the data that exists in that single application.

Without access to the data that lives in other systems, all it delivers is a disconnected fragment of your relationship with the customer. What's missing is a total view of your relationship with your customers. Informatica and Trianz define this relationship as having a trusted customer profile that is up-to-date, accurate, complete, and consistent across the company.

The unique combination of leading master data management solutions and expert professional services helps you create customer profiles that not only include their name, contact and demographic information, but also rich details such as:

- Members of a customer's household or corporate hierarchy
- The customer's purchase history across the company and channels
- Their channel and location preferences
- Their relationships with employees and channel partners
- Other important information from third-party sources and social networking platforms

To deliver great customer experiences, you must bring together the fragmented and inconsistent data scattered across siloed applications and manage it in a central location. A neutral, third-party partner is often much more successful at initiating this type of companywide, top-down approach. Bringing a consultant on for these efforts helps identify where the data is stranded and helps to instill new cultural attitudes that promote a customer-centric, data centered company.

Once the master data is compiled, all your applications can be fueled by a foundation of data that represents a consistent, multidimensional view of your total relationship with any given customer.

That great data will lead to great customer experiences.

## Seven steps for delivering great customer experiences

To reach this point, Trianz, an Informatica Elite Systems Integrator and Authorized Reseller, will help you define a data strategy and instill it within your organization so you can perform these seven steps in a sustainable and repeatable way.

1. Identify your most valuable customer information across your different systems.
2. Cleanse your data, correcting the inconsistent, inaccurate, and incomplete data that populates your systems.
3. Master your data to get a single, trusted customer profile that resides in a central location
4. Relate your data to other important data points, such as other customers in the household, products purchased, purchase channels (online or in-store), associated partners, and so on.
5. Enrich your data with social data, clickstream data, call log data, and demographic data.
6. Deliver your clean, connected data to and from every application relevant to total customer relationship.
7. Govern your data through company-wide data governance that guarantees accurate, actionable, customer-ready and regulation-ready customer data.

Intelligent data management doesn't call for the expensive purchase of a brand new CRM system or service-desk solution. Instead, intelligent data management is about organizing the data assets you already own so that everyone can get the most from them.

Once you achieve these seven steps of intelligent data management, you'll deliver the great customer experiences that people remember.

Ignore them and the painful symptoms of your fractured customer relationship will continue to plague the best efforts of your sales, marketing, and customer service teams.

Once you have great data, you can deliver the great experiences that your customers crave.

### What great data does for customer experiences: The Hyatt Hotels & Resorts story

Hyatt Hotels & Resorts has a complicated business with nearly 700 hotels and resorts spread across six continents. An operation of that scale is full of silos and fragmentation.

Customers want a seamless experience no matter where they travel. They expect that the preference they shared during their Hyatt stay at a hotel in Singapore is understood by the person working at the next hotel in Dallas.

The company set out to understand how big its data problem really was—and it uncovered tons of disconnects. A search for one name in the central customer database, for example, turned up 13 different versions of the customer.

Hyatt's data team defined a plan to connect all the fragments to gain a reliable view of the total

customer relationship. Previously, they would have had to manually pull together customer information scattered globally across 25 different applications.

Today, they're using automated data integration, data quality, and master data management to make all their data clean, consistent and connected.

"Data is what makes it possible for Hyatt colleagues to provide a personalized experience that guests do not forget. Thanks to the relationship with Informatica, Hyatt can relate the data together and give colleagues the means to act on it across all Hyatt hotels worldwide," says Srihari Thotapalli, Director, Customer Data Management at Hyatt Hotels.

The results of this incredible transformation speak for themselves; a double-digit increase in revenue from loyalty members. Even more impressively, Hyatt's upsell and cross-sell program in the Americas increased revenue by an even larger percentage year over-year.

These stats speak to real, tangible revenue benefits from intelligent data management. The bottom line is that customer experience is the new competitive advantage, and it starts with great data.

### ABOUT INFORMATICA

Informatica is 100 percent focused on data because the world runs on data. Organizations need business solutions around data for the cloud, big data, real-time and streaming. Informatica is the world's No. 1 provider of data management solutions, in the cloud, on-premise or in a hybrid environment. More than 7,000 organizations around the world turn to Informatica for data solutions that power their businesses. For more information, visit [www.informatica.com](http://www.informatica.com).

### ABOUT TRIANZ

Trianz simplifies digital evolutions through effective strategies and excellence in execution. Collaborating with business and technology leaders, we help formulate and execute operational strategies to achieve intended outcomes by bringing the best of consulting, technology experiences, and execution models. Powered by knowledge, research and perspectives, we serve Fortune 1000 and emerging organizations across industries and geographies to transform their business ecosystems and achieve superior performance by leveraging Cloud, Analytics, Digital, Infrastructure and Security paradigms.