



Fixing Customer Data Issues for Good: A Marketing Leader's Guide

How a Customer Data Platform Should Resolve Your Customer Data Challenges





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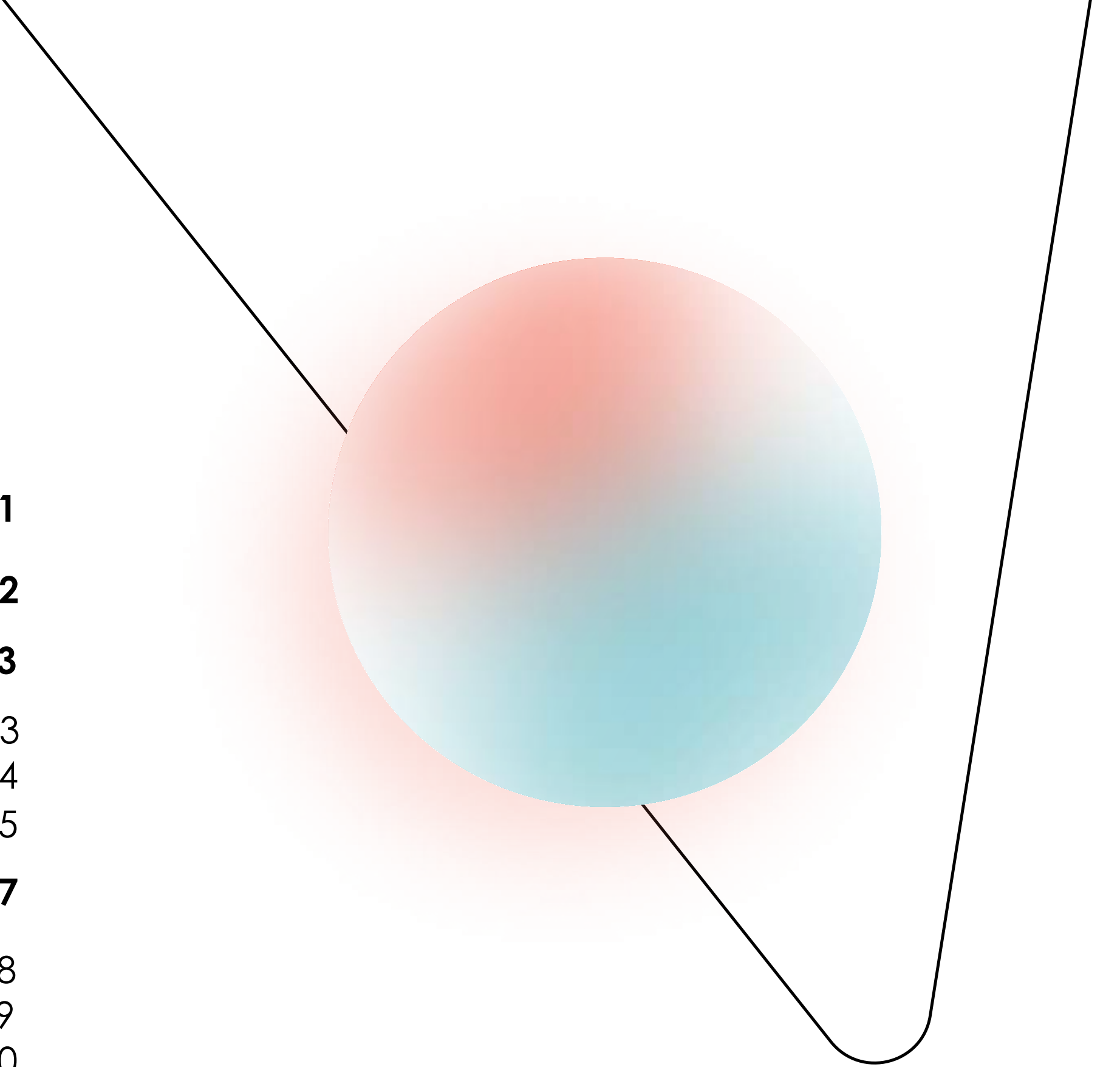
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Introduction

Over the past decade, the rate at which data is created, captured and consumed has exploded, and it's accelerating even more rapidly now than ever before. In fact, research suggests the amount of data created will triple between 2020 and 2025¹, thanks in part to the emergence of new technologies and increased digital engagement across demographic groups.

Yet, despite the substantial amount of data being created every day, brands still struggle to leverage it to their advantage. Businesses should be able to easily tap into all of their data sources to better understand and engage with their customers, but research shows this isn't the reality for most marketing teams.

Currently, marketers are fighting with one hand tied behind their backs – they want to deliver next-gen marketing, but they're stymied by their inability to access, utilise, interpret and disseminate customer- and business-level data and insights. They want to create hyper-personalised cross-channel experiences, utilise AI efficiently and effectively, deploy advanced targeting strategies and more, but without access to real-time data, this simply isn't possible. And the solutions currently on the market are arguably holding them back from achieving these goals.

To realise these strategic and operational goals, marketing leaders must ensure their business's data foundations are robust, fit-for-purpose and future-proofed. In this guide, we'll outline how marketing teams can achieve this quickly and cost-effectively by prioritising their requirements and utilising specific use cases as a means of implementation.





Who is this guide for?

This guide is for senior marketers and business leaders who are:

- ✓ Investigating the possibilities that a continuous single view of the customer can unlock for their business.
- ✓ Looking to understand the benefits of a fully-connected and activated data asset.
- ✓ Frustrated with their business's data foundation and want to fix it, but are unsure where to begin.
- ✓ Seeking a new perspective on achieving customer insight, personalisation and targeting objectives.
- ✓ Considering running a Customer Data Platform (CDP) request for proposal (RFP) to optimise their data-driven marketing.



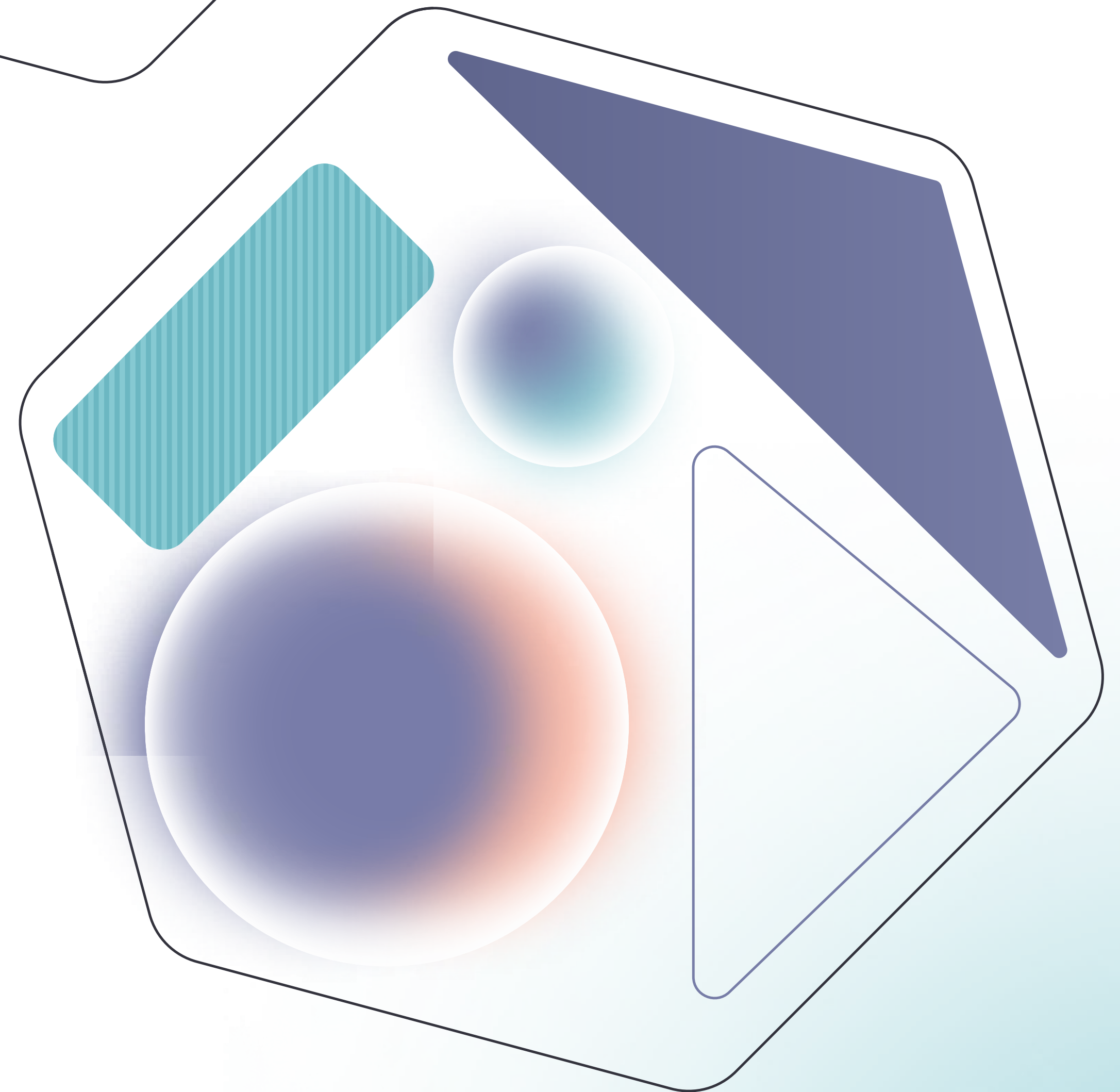
Customer data foundations: An overview

What do we mean by “customer data foundation”?

Generally speaking, a customer data foundation is the solution that collects, stores and organises various sources of customer data such as transaction history, demographics, channel engagement and more. This core asset should provide the foundation for customer insight, campaign analysis and marketing activation. For many businesses, this foundation will be their Customer Data Platform (CDP), but it may also include other data assets like a Customer Data Warehouse.

Ideally, a customer data foundation should offer a full, continuous and activated 360-degree customer view.

- ✓ **Full:** All available data is matched to a profile and flows into a connected view.
- ✓ **Continuous:** The data is consistently updated with both behavioural and transactional data, giving you the most recent information available.
- ✓ **Activated:** Data is seamlessly integrated into marketing and BI tools.



Why is a customer data foundation important for marketers?

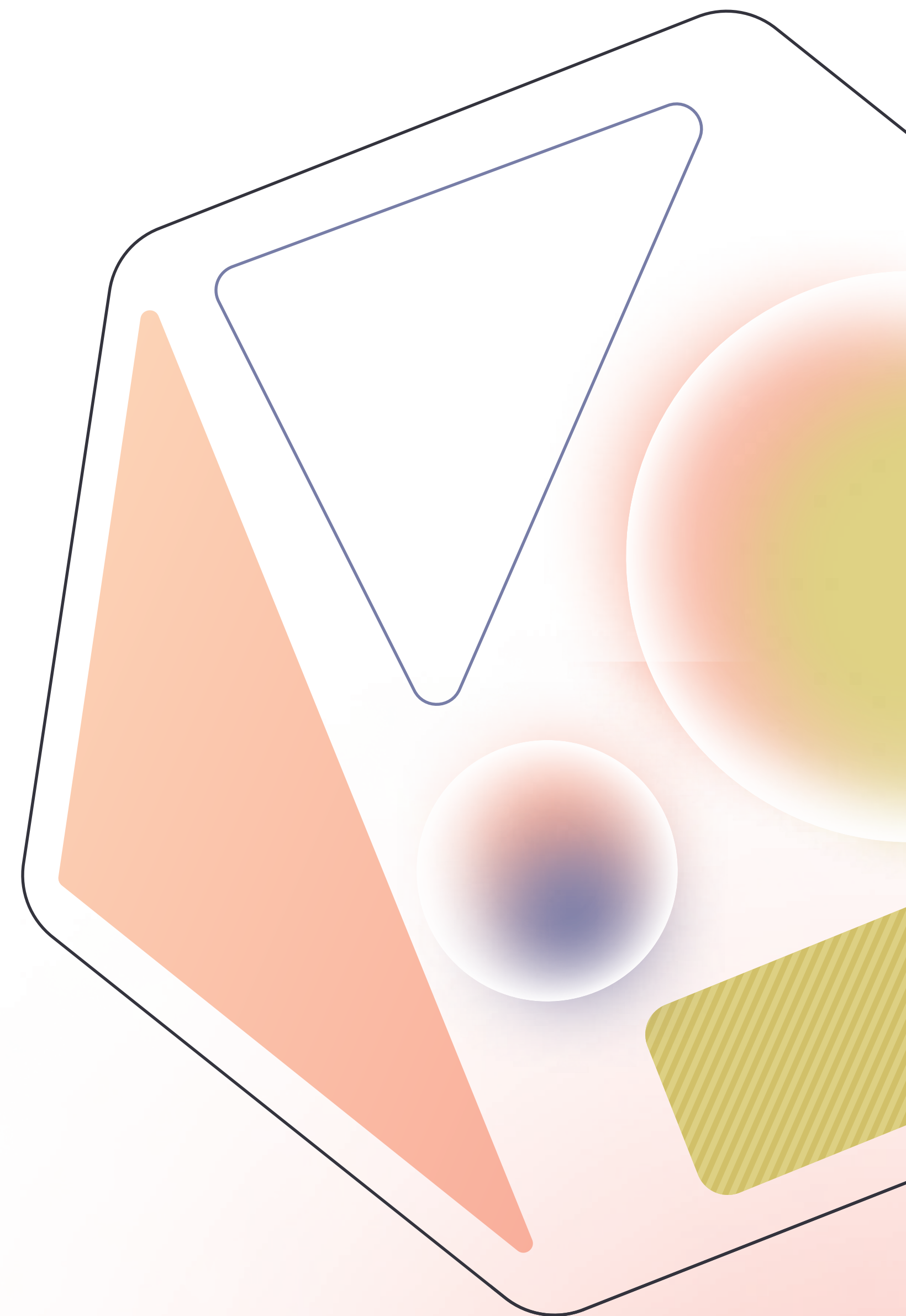
Data can power innovative marketing across a number of areas, including analysis and insight, audience optimisation and targeting, advanced personalisation, and cross-channel customer experiences. Not to mention, it's the bedrock for strategic and technological initiatives like media monetisation, margin optimisation, loyalty programmes and artificial intelligence (AI), to name a few. Without unified and accessible data, marketers will simply be unable to effectively implement these strategies into their programmes, and customers will likely seek out brands that provide a better experience as a result.

Beyond the marketing team, customer data foundations are integral for the broader business. They enable the democratisation of insight into customer behaviours and desires, which directly impacts wider strategic initiatives and business operations.

What are the common challenges with today's customer data foundations?

It's never been more important to understand the customer and deliver seamless and personalised experiences. However, marketing leaders are faced with a number of challenges with their data foundations that are holding them back, including:

- 01** Internal resource and expertise is limited, so building or managing a bespoke fit-for-purpose solution becomes untenable.
- 02** Customer Data Platforms (CDPs) aren't standardised and can be inflexible. CDPs often require fixed schemas to collect and store your data, demand significant resource to build integrations, and can come with a hefty price tag. Plus, if your chosen solution simply passes data through it for insight and activation rather than storing it, you'll need to invest in yet another asset for data management (like a Customer Data Warehouse).





On top of these challenges, marketers are under increased pressure to justify their investments and reduce tech stack redundancies and utilisation gaps.

Wouldn't it be great if marketing teams could invest in technology that resolves their data problems while also unlocking new insight and activation opportunities?

We argue that this is not only a possibility, but that it's actually the best way forward. A "use case by use case" approach can deliver fast time to value and practical implementation that can be built up over time rather than the traditional "rip and replace" methodology. We'll discuss how exactly this can work in the closing section of this guide, but first, let's discuss the capabilities of core data foundations and uncover the key lookouts marketers need to keep in mind when working to fix their data dilemmas.





Key considerations to fix your customer data foundations for good

Businesses have different requirements for their data, so there isn't one "best" solution out there to fix marketers' customer data problems. With that in mind, marketing teams need to begin their evaluation introspectively, taking into consideration their brand's unique requirements, audiences and capabilities. Furthermore, they should think about which data-driven marketing techniques and strategies will be most valuable to the business, as this may change how you evaluate your core data solution. For example, an ecommerce business will likely prioritise low-latency updates so they can deliver real-time experiences, whereas a clicks and bricks retailer may prioritise robust matching capabilities to ensure online and in-store behaviour can be linked to individual customers.

When considering which use cases will have the biggest impact on the brand (both immediately and in the future), marketers will be able to hone in on the most important requirements for their data foundation.

Ultimately, we believe flexibility and control are the name of the game here – modular and composable data platforms will help you achieve the strategic and operational outcomes you're striving toward without being overly costly or time intensive to implement

As you go through this process, here are a few specific considerations to keep in mind that will enable you to achieve your goals.



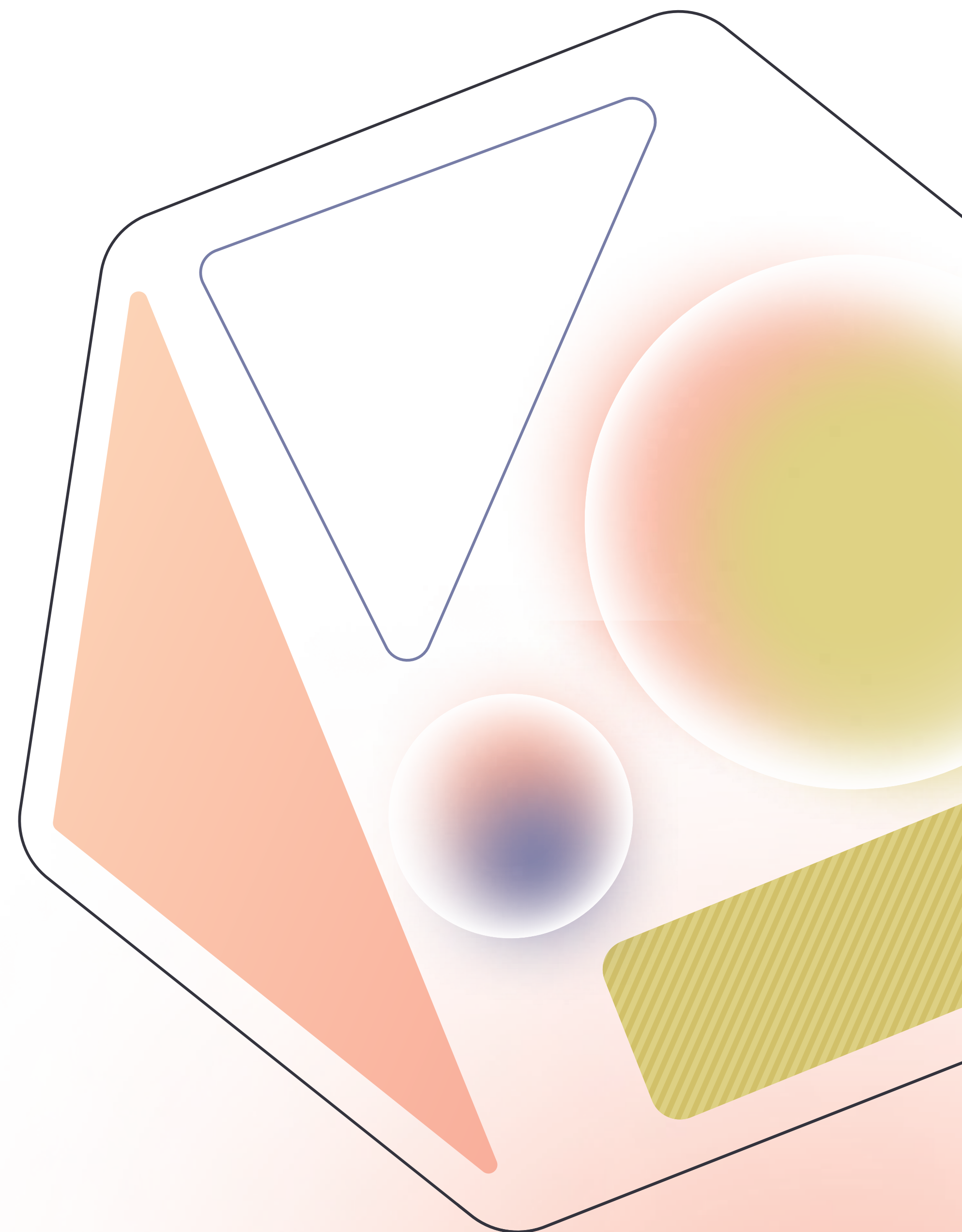


Data Breadth

Today's customers expect seamless and tailored experiences. But many brands fail to deliver these experiences because their data doesn't give them a full view of their customers.

Your data foundation should be designed to centralise datapoints from a large variety of sources, from behavioural to transactional and online to offline. Marketers shouldn't settle for a solution that can't unify all of their data and eliminate silos across the business. It's important to remember that brands' data sources vary, so before creating an RFP or embarking on a data transformation project, be sure to map out all of your data sources, both current and potential for the future, such as:

- ✓ Customer profiles, including demographics and contact information
- ✓ Transactional data (online and in-store)
- ✓ Channel behaviour (e.g., email engagement, DM/SMS engagement, social media engagement, etc.)
- ✓ Website and app behaviour (both known and anonymous)
- ✓ Product reviews
- ✓ Customer service interactions
- ✓ Loyalty programme interactions
- ✓ Promotion uptake
- ✓ Competition or survey data





Data Depth

Similarly, to deliver optimised customer experiences, many businesses will need a full historical view of each customer, so storage limitations must be considered. This is particularly important to businesses with an aspect of seasonality, like clothing retailers, and brands that have long customer lifecycles.

The interactions and preferences of individual customers change with time. For example, one customer may be drawn to bright colours in the spring but dark colours in the winter, while others may have a particular palette that they stick to year-round. This may seem like a trivial example, but the ability to gather insights and create tailored experiences using a full historical picture of a customer's interactions with your brand can be a game-changer. Furthermore, you'll want as much data as possible to train predictive models and AI, identify unique lifecycle and retention insights, analyse long-term marketing impact and more.

Many data foundations limit the amount of data that can be stored or charge a premium for large storage capacity. But this isn't always the case. If depth of data is important to your marketing strategy – or could be in the future – be mindful of retention barriers.

Looking for a customer data technology platform that enables you to use all of your data to make every customer interaction better? Meet Unilyze, Plinc's AI-enhanced, real-time data platform, connecting millions of customers and billions of interactions for insight and activation.

Unilyze enables you to unify, analyse and activate all your customer data from all sources – no matter how disparate and no matter what format. It's completely composable and modularised, so you can adapt Unilyze to your needs without being boxed in. Plus, there are no limits on data storage so you can use a customer's full transactional and behavioural history for analysis and activation, and no limits on the number of data sources you can integrate to build out your continuous 360-degree customer view.



Matching ability

Of course, having an expansive breadth and depth of data is only useful if you can match that data to known customers across channels.

If you're looking to fix your data foundation, this might be a good starting point to evaluate any issues with your current solution. What percent of your current transaction value can be matched to known customers? Are you able to match both in-store and online data, if relevant for your brand? If a previously unknown customer makes themselves known (they complete their first purchase and create an account, for example), can you connect their previously-anonymous activity prior to the purchase to their profile in a GDPR compliant way?

We'll discuss these notions in more detail in the next two sections, but the key takeaway is this: matching processes require a great deal of nuance. Your data solution should be built using relevant matching processes for your business to retain your unique view of the customer.

What does "good" matching look like?

Well, to give you some context, with Unilyze, clicks and bricks clients are matching up to 90%+ of sales volume to an identified customer. We've also helped clients increase the amount of data matched to a customer by a factor of 20x by calibrating Unilyze's bank of matching algorithms to their business.



Future-proofing and resource management

Whatever solution you choose, this is an area where you shouldn't compromise. As mentioned in the previous section, there are solutions available (like Unilyze) that bring in data in raw format. Others will have predefined sets of attributes or data structures that may not be reflective of your customers and their experiences. Furthermore, your data should ultimately be managed and processed in your platform to enable both deep customer insight and activation use cases with an adaptive data structure.

To recap, when your data is being configured, make sure it's not being defined in a way that someone else defines your customer. We enable this by bringing in data in raw format rather than a predefined set of attributes or data structures that don't reflect your customers and their experience



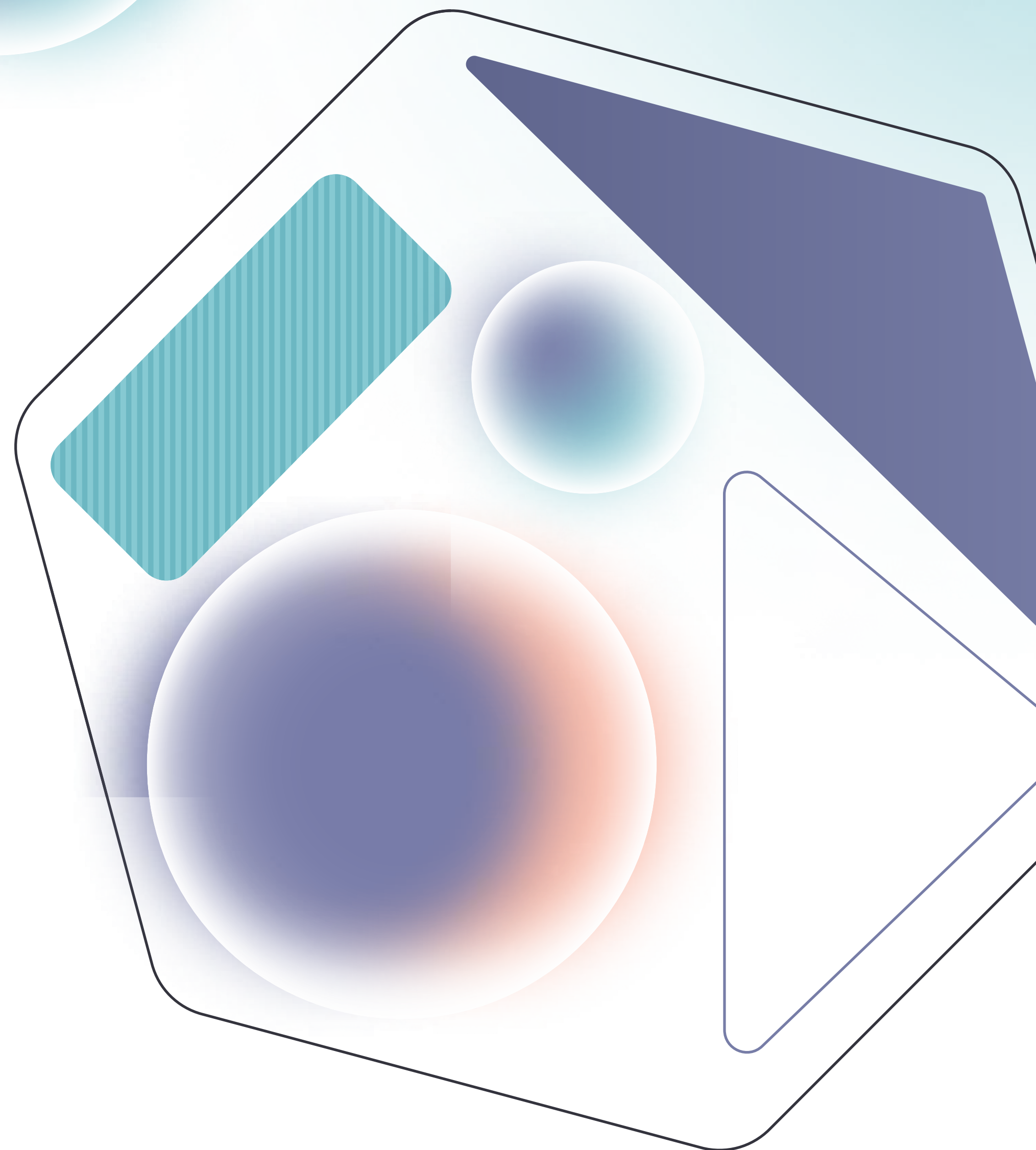
How does Unilyze support flexible, low-effort configuration?

The Unify API (Unilyze's codeless data integration) is designed to accept your data in its raw format and transforms your data within the platform. This means there is no effort required by technical resource to engineer data sets into a standard format for use by Unilyze; we are able to ingest your data from wherever it sits and in whatever state it rests.

Using Unilyze's Unify API as the primary ingestion method reduces cost and time to implement and will ensure future data sources and technologies can be implemented easily in the future.

Beyond the Unify API, Unilyze is capable of multiple data ingestion methods, configurable on a system-by-system basis and offering your brand total flexibility, including:

- **HTTP(s) Post:** Source system regularly posts to the Unify "Event" API endpoint, with data provided in source structure (JSON or XML) within the body of the request. The system does not require the payload to be configured to match any specific structure. The Unify ETL and Rule Engine is capable of being configured to match on the fly to whatever data structure that has been supplied.
- **Batch File:** CSV (or similar) files uploaded to Blob storage or SFTP
- **External DB:** Connection details and query logic provided, with which Unify will connect and retrieve data on a predefined schedule. Examples include Azure SQL, Snowflake and AWS.





Accessibility

Once you've nailed down your requirements in terms of collecting, storing and matching all of your data, you'll want to consider accessibility.

To achieve the greatest impact, your data needs to be accessible and understandable across the business. Technical marketers, analysts and BI teams should be able to access the full spectrum of data, including in SQL environments where applicable. Non-technical individuals should have access to intuitive dashboards and reports to better understand the impact of their work and the behaviour and trends of the business's customers. These reports should highlight the metrics most relevant for your business – you shouldn't need to retrofit them to meet your specific needs. Not to mention, they should be updated regularly to ensure the business can leverage the data and insights to their fullest.

Unilyze is designed to equally enable businesses across both insight AND activation use cases. As well as benefiting from full SQL access for technical marketers and analysts, clients are able to choose from a range of reporting automation solutions and drag-and-drop front ends to easily create sophisticated audiences.

When Unilyze is configured to a client's data, each inbound data attribute is meta tagged by use case (analysis/activation). When a model or report is run or turned on, Unilyze knows where to go to get the data in the environment configured specifically for you, which enables low latency analysis capabilities.



Integration

This may seem like an obvious one, but it can be surprisingly complex...

The average tech stack size is starting to shrink across businesses of all sizes, and improving resource management and reducing redundancies have become key objectives for many marketing teams. Still, businesses have a staggering average of 269 SaaS applications in their stack.^[1] Finding a data platform that can seamlessly integrate with all of these applications can feel a bit like herding kittens, and in many cases, you might not even know how many kittens need to be wrangled in the first place.

Avoid ripping and replacing existing tools by selecting a data platform with an abundance of out-of-the-box integrations and the option to build custom integrations. This will be key to connecting and activating all your data sources to get the most value.

Latency

With so much digital data being created every minute, it's shocking that 61.5% of senior marketing and CRM professionals say their core customer data foundation is updated once per week or less frequently. For many businesses, it's essential to capture intent signals as they're occurring and orchestrate experiences based on those signals. Whether it's abandoning a basket or clicking through an Instagram ad, intent data enables marketing teams to predict future behaviours, encourage those behaviours, and analyse real-time activity to get a better understanding of the impact of specific actions.

^[1] Source: Zylo 2024 SaaS Management Index Report

What does a low-latency data foundation look like in practice?

With Unilyze, the core database is updated every 60 seconds on average, so no attribute is more than one minute old. Analytical data is updated every 15 minutes or less; this will be dependent on your needs, and some clients opt for real-time reporting to ensure their insights are always up-to-date.

In terms of activation, Unilyze's real-time data layer can activate personalisation use cases in as little as 100 milliseconds, enabling in-moment personalisation to make your communications and customer journeys hyper-relevant.

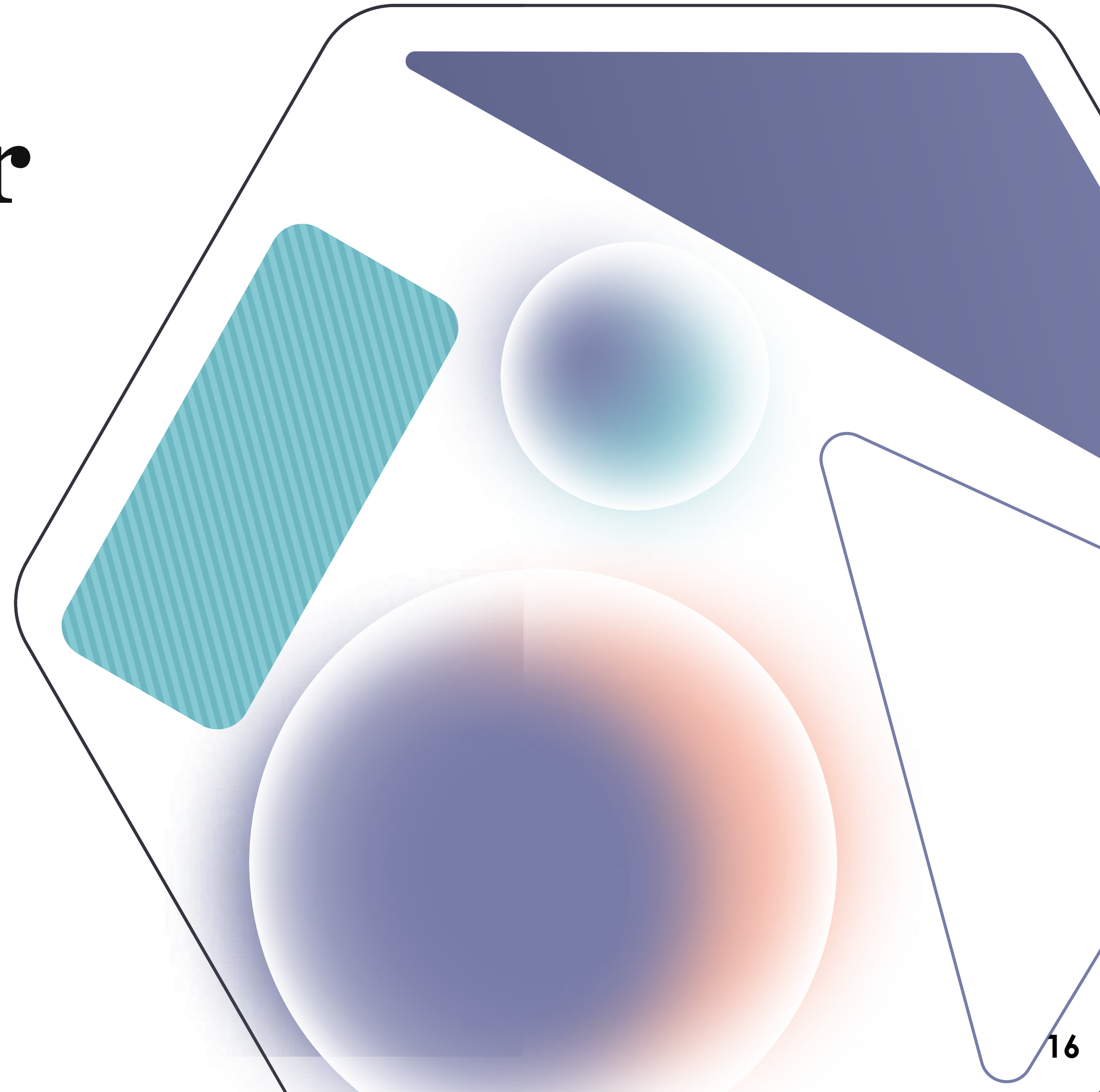


Fixing your customer data foundation use case by use case

We mentioned earlier that marketing teams can resolve their core data issues faster and at a lower cost by prioritising individual use cases as a means of fixing these underlying problems. Now that we've covered the key considerations of data foundations, let's discuss this approach in more detail.

To demonstrate this approach, let's start with a very common first-step use case: real-time pre- and post-purchase emails. Especially for retail marketers, a well-timed pre- or post-purchase email can be the key to increasing sales, boosting customer loyalty and driving purchase frequency. The average basket abandonment rate is a whopping 70.19%^[1], and in many cases, all a customer needs to complete that purchase is a little nudge! But for that nudge to deliver the optimal impact, it needs to be triggered by real-time browse and purchase data.

[1] Source: [Baymard Institute](#)

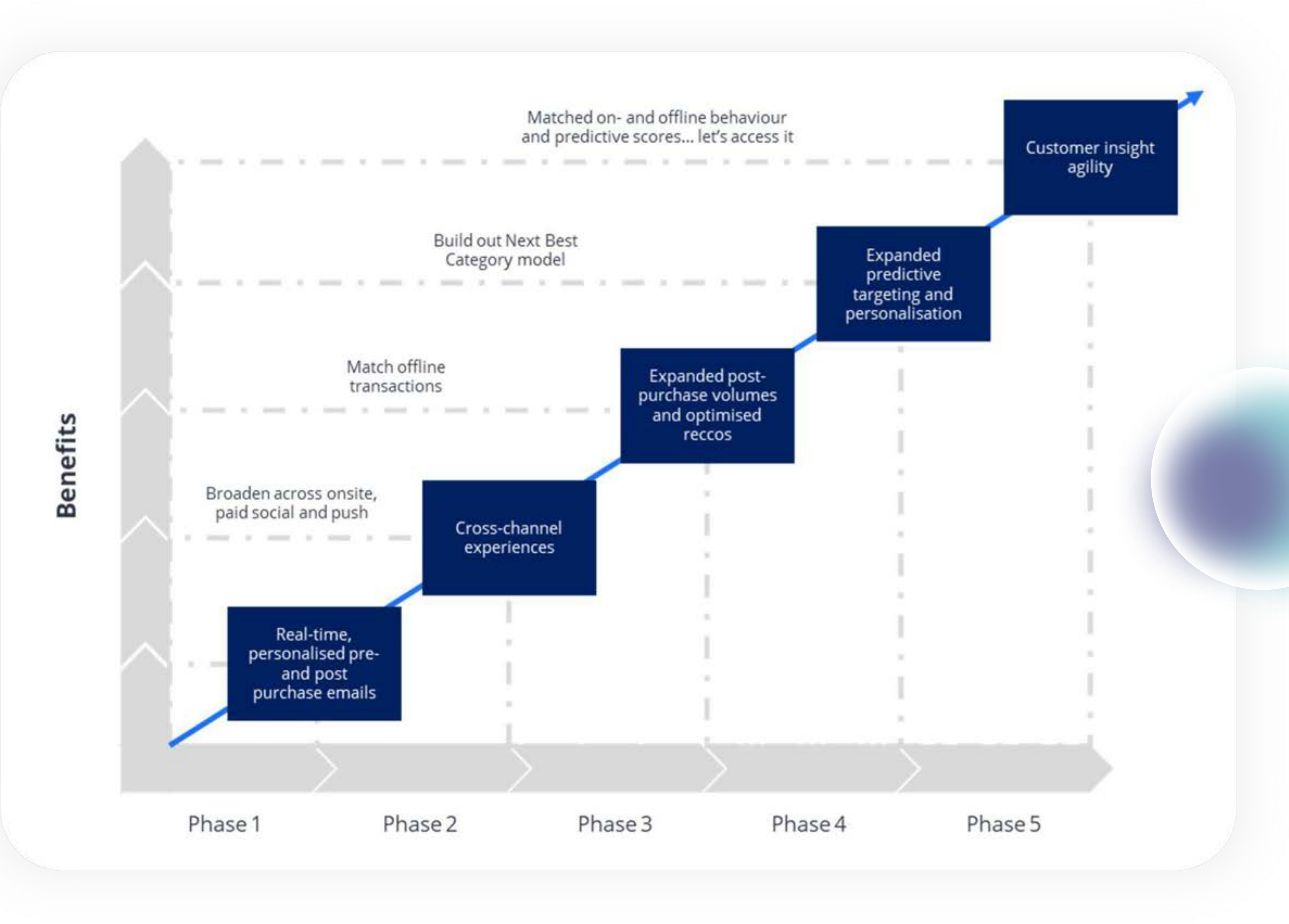




But it doesn't stop there. Once brands have successfully unified their website data to capture and activate browse and purchase data, they can begin to add additional data streams like paid social, push, DM and SMS. Clicks-and-bricks businesses will also want to join up their instore data to ensure they have the full picture of each customer. When sources are unified for both ingestion and activation, marketers can deliver streamlined cross-channel experiences.

The next step to boost your pre- and post-purchase strategy is to include personalised recommendations. But to achieve this, marketers need to tap into a full historical view of the customer to suggest the most relevant products for each individual. This can then be expanded by implementing a Next Best Category model, increasing breadth of shop and opening customers up to new opportunities with your brand.

With all of the data integrated to deliver product and category recommendations, marketers can continue to elevate their predictive targeting and personalisation to new heights. If your data is connected to enable both insight and activation (like it would be with Unilyze), advanced customer insight agility becomes possible, giving marketers unmatched insight into their customers and the impact of their campaigns.





As this example demonstrates, starting with one use case can lay the groundwork to resolve your broader data issues one step of time. With the initial use case acting as a proof of concept, it can then be expanded upon to bring together more data and create additional avenues to reach your customers. But this can only work if the platforms you select are:

- ✓ Full, continuous and activated
- ✓ Built for insight and activation
- ✓ Created for flexibility and control

To achieve this, you can either look for providers who can deliver end to end data integration and activation, or find vendors that can facilitate a stepwise approach, as described above. Ultimately, this decision will likely be determined by budget and resource, but either way, keeping these considerations top of mind will enable you to fix your core data foundation for good.

At Plinc, we excel at data projects big and small. We can deliver “the whole shebang” – run a full audit; unify, analyse and activate all of your data with Unilyze; provide consultative services and more – or we can start with one use case, enabling you to build up your capability over time as you prove value.

Whichever method you prefer, give us a shout. One of our knowledgeable solutions experts can listen to your requirements and walk you through our recommendations, helping you determine what will work best for your brand (whether you choose to work with us or not).





Plinc helps brands get more relevance, resonance and revenue from their customer data. We do it with Unilyze, the AI-optimised, real-time data platform, connecting millions of customers and billions of interactions. It's built for both insight and activation, and is flexibly engineered to suit your brand's unique strengths.

From data-driven personalisation and campaign targeting through to self-serve analysis and insight, Unilyze's modular customer marketing solutions enable you to deepen customer loyalty and optimise experiences across channels. It's all backed by expert marketing services, helping you do even more with your data.

Get in touch to learn more



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