TRILLIUM SOFTWARE®

HARTE HANKS

Create A Single Customer View

Although most large organizations have spent significant time and money building CRM systems, few have achieved the elusive "single customer view" they expected. The complexities of handling customer data from multiple sources are a lot harder to resolve than many originally thought. Data quality plays a key role here in building and maintaining up-to-date integrated views of customers. It not only corrects and standardizes data but also consolidates multiple records pertaining to a single person and identifies consumer households and corporate relationships across records. Successful organizations are finding that, for CRM to work, data quality is fundamental.

Why Customer Data Is Hard To Manage

Customer data from multiple sources presents many challenges:

Problems with existing data—Data errors and duplicates exist even in single sources. Those problems become exponentially more difficult when multiple sources are being consolidated and/or synchronized.

Identifying related customers—How consumers or corporate customers are related means knowing who shares a household and who belongs to the same subsidiary or parent company.

Multiple functions play a role in CRM—Customer relationship management involves multiple systems, complex workflows, and people from sales, marketing, and service organizations, whose activities must be coordinated and whose needs change over time.

Changing data—An accurate, up-to-date, and integrated record for each customer is difficult to achieve because the facts themselves keep changing. Every transaction registers some change. In addition, about 2% of all customer data becomes stale each month.

A single view is multidimensional—Creating a 360 degree, unified customer view requires integrating not only customer profile data, but also relating product purchases, call history, credit history, etc. across multiple divisions within the organization.

According to Gartner without adequate resources to focus on data quality an organization's CRM efforts will not be successful.

Trends Today in CRM

CRM is becoming even more challenging as organizations vie for competitive advantage and try to move beyond the basics:

Real-time data integrity—Organizations are seeking real-time or nearly real-time data of high integrity, across systems.

SOA processes—Companies want consistent business processes that connect departments and span applications in an effort to resolve un-unified, uncoordinated activities and improve the customer experience. This requires disciplined governance at the enterprise level.

Renewed collaboration between IT and the business—Many CRM initiatives have failed because IT and business users have had trouble communicating and working together. More organizations are focusing on building processes and using tools to facilitate better and more frequent communication.

Global imperative—Customer bases are more global than ever. Companies are looking for more sophisticated global technologies. They require Unicode capabilities that allow them to handle data from around the world seamlessly and consistently.

CDI—Customer data integration is receiving increased attention as companies realize that basic CRM alone has failed to deliver the single view they expected because of the number of systems involved with real time updates.

Third-party enrichment—As marketing analytics are more widely used for segmentation, target marketing, and campaign management, third-party data such as demographics, lifestyle, corporate background information, and postal/geographic information provides increasing value. Once purchased and incorporated into a unified view, this additional data is available throughout the organization and can serve multiple functions at no additional cost.

How to Get Ahead of the Curve

While most companies look to improve their CRM systesms and technologies, investing in sub-applications and workarounds, bringing in expert consultants, and wrestling with how to realize greater gains from what they have in place, the ones who are able to quickly and cost-efficiently make the biggest leaps forward are the ones who address the data itself, as opposed to the CRM technologies surrounding the data.

Data is inherently fickle. Not only does it frequently enter a system already in a state of ill-repair, but even what comes in as accurate and consistent information is predisposed to soon be out of date and unreliable. Changes and new transactions must all be tied to exactly the right customer in order to maintain the unified view that required so much effort to create in the first place.

The answer to customer data management challenges is almost always found in incorporating an enterprise-strength data quality solution that can handle tough challenges such as:

Gives business users a window into the actual data—The business has the expertise to make decisions about what data means, whether it is valid, and what is likely to be an anomaly. An effective data quality solution must therefore provide appropriate tools for business users to view and interact with the data.

Cleans data at every source—Cleaning data in real time, at the source is the best strategy to prevent bad data from ever entering a CRM system, especially for systems most responsible for providing data to a CRM solution, and including the CRM system itself.

Interoperable—Because systems creating data for your CRM system could be on any platform, could be any technology, and could be provided by any vendor, a neutral data quality solution that easily integrates with the mix of possibilities within your organization will be an important criteria, even if your immediate plans are for a limited selection of applications.

Manages duplicates—Preventing duplicate records from being created is a major effort. Duplicates throw off all downstream analysis, segmentation, modeling, targeting, profiling, etc. because the customer's information is fragmented across multiple records. A data quality solution should be extremely flexible in meeting your organization's specific definitions of what is and what is not a duplicate.

Supports your survivorship strategy—As information from different sources is made available for updating your customer view, you may have a complex set of rules regarding what data should be updated based on source system, recency, the completeness of the new value, etc. A data quality solution should be able to accommodate even the most complex update logic.

Trillium Software System®: Building Single Views

Trillium Software leads the data quality industry, offering the most advanced products for building and maintaining a single customer view. Our products also establish data standards for integrated customer information that can be shared across multiple systems.

The Trillium Software System builds rich customer data that can be shared by different business functions and systems and provides ways to monitor and maintain that data on a continuing basis.

Assess all relevant source data—Prior to integrating, business and IT work together in a collaborative workspace to:

- Examine large volumes of fully profiled data sets
- Identify errors, inconsistencies, and anomalies
- Discuss and agree on what data to migrate and how
- Plan how to correct and standardize the data
- Understand what ETL transformations are required

Correct and standardize—Use automated rules-based processes to correct and standardize data to:

- Interpret data, including product data and unstructured text data within its appropriate context both for format (syntax) and meaning (semantics)
- Correct misfielded and inconsistent data
- Supply missing values
- Standardize all values
- Correct to conform to specific business rules

Consolidate—Integrate data from disparate systems to:

- Identify duplicates and redundancies
- Link corporate records from various business units, subsidiaries, and related companies
- Define households for consumers
- Create single best records that can be traced back to the original sources

Enrich—Supplement consolidated records with additional customer information, such as:

- Physical address changes
- Email addresses and phone numbers
- Preferred method of contact
- Demographic information
- Corporate profiles
- Do Not Contact preferences

Monitor—Ensure that data quality remains high and data stays consistent, accurate, and complete through:

- Real-time data correction and synchronization
- Alerts to specific events/changes in source systems
- Tracking trends over time
- Regularly scheduled data audits
- Error prevention at the source, avoiding degrading sources, warehouses, marts, and customer data hubs

Better CRM with The Trillium Software System

Data quality is fundamental to successful CRM. It benefits many aspects, from initial implementation to advanced analytics and enterprise-wide standards for customer data:

Decreased integration risks—Four out of five integration projects fail. Underestimating data problems causes them to run over budget and/or finish late. Data quality software reduces these risks through upfront, automated data profiling and analysis and through automatic correction and standardization during the integration process.

Higher customer satisfaction—Higher quality, well-integrated data provides a well-coordinated and streamlined customer experience without the errors and missteps that can cause customer defections and costly errors.

Greater business user acceptance—Users trust high-quality data and are far more likely to rapidly adopt new systems and business processes.

More revenue per customer—Better knowledge of purchasing habits, preferences, history, and household relationships increases opportunities to upsell and cross-sell.

Manage customer identities precisely—Compliance and privacy regulations demand more precise and reliable identification of customers.

Accurate analytics—Higher quality data delivers more accurate segmentation, target marketing, model scoring, and reliable forecasting.

Reduced errors in operational systems—Data quality processes can reduce the errors that enter and pollute operational systems, where 30% error rates are often the norm.

Enterprise-wide customer data standards—Organizations must establish standards for data governance in order for business processes that span multiple applications in a service-oriented architecture to work.

Global business flexibility—Data quality software processes global data according to local cultural, linguistic, postal, and electronic conventions and allows businesses to more easily and flexibly transact business globally.

Rapid information integration—Rules-based standards for customer data streamlines the integration of new information from acquisitions, mergers, and third-party sources to existing data stores.

A Solid Foundation for CRM

The Trillium Software System helps companies build a foundation for true customer data integration. Our customers are confident that reusable, repeatable processes can help them maintain and promote data standards for CRM across the enterprise, not just to meet today's business needs, but to meet tomorrow's as well.

Harte-Hanks Trillium Software
www.trilliumsoftware.com
Corporate Headquarters
+ 1 (978) 436-8900
trilinfo@trilliumsoftware.com
European Headquarters
+44 (0)118 940 7600
trillium.uk@trilliumsoftware.com

HARTE HANKS TRILLIUM SOFTWARE