



Make Your Customer Data Platform a Corporate Asset

3 rules to help you not build yet another customer data silo

Who “owns” the customer experience? For companies like yours – seeking to deliver outcomes that keep customers engaged and loyal – few questions are more important.

The problem is that responsibility for the customer experience is so often spread out across different business units who touch the customer across their complicated journey: point of sale, online, mobile, customer apps, internet of things (IoT), customer service – the list goes on.

Let’s say you head up one of these business units. You want to be effective. You need to understand your customer. And you understand that this requires data visibility. So, you set out to solve this problem by either stitching together multiple systems or try to build your own customer data platform (CDP) for a single source of truth for all customer information.

You’re not alone. Chances are there’s someone at your company in another department trying to do the same thing as we speak. Databases of customer information are everywhere – homegrown, best-of-breed databases that someone, somewhere attempting to finally solve this ‘single view of the customer’ only exacerbated the problem with yet another data silo.

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How, then, do you implement a solution that actually serves as the single source of truth for all your customer information? The key is to approach a CDP as a valuable corporate-level asset that is sanctioned by IT and the business, yet owned and operated by the marketing team. A system designed to yield visibility into your customers for the entire organization, regardless of the data source.

Here are your three rules for success:

Rule #1: Get support from the top

It's important to start from the highest levels of your organization. The goal is to get everyone working together, aligned to the same goals of customer intimacy, loyalty and ROI. Many customer data platforms on the market today emphasize quick and fast, out-of-the-box functionality – but that just won't cut it in 2018 with the explosion of customer data sources. No way. And unless the entire organization is on the same page, you're looking at another data silo that gives you half-measures and half-results.

This is an important insight, but it's hardly new. Recognizing the need for a holistic approach, some organizations have even developed C-level positions such as Chief of Customer Experience. Whatever your specific approach, executive engagement is key. If your company is to be truly customer-centric, it needs to be customer-centric from top to bottom and you need to measure meaningful KPI's that cut across your teams.

Rule #2: Involve IT – and empower users with self-service

Data projects that don't involve IT are problematic on multiple levels. Chief among them is security. If you're striving to improve the customer experience, the last thing you need is a security lapse that will put your customers – and your company – at risk. Best to have IT on board from the ground up.

The IT department is also important because of its reach. A customer data platform extends across the entire enterprise – that's the whole point. Leaving IT out of the picture will be an exercise in futility.

Not that IT needs to do all the heavy lifting. Rather, they should be your supporter and champion because you have done your homework and given them the peace of mind to let you run your business, engage with your customers in meaningful, holistic ways. Your customer data platform should be cloud-based – which alleviates IT of the complexity involved in an on-premise implementation and maintenance. Be sure to look for offerings with a comprehensive library of data connectors that help speed data consolidation. Also critical: professional services for tasks like building custom connectors to proprietary sources such as customer apps.

Ultimately, your goal is to empower business users throughout your organization with powerful self-service capabilities. The role of IT is that of checkpoint to validate the technical approach taken. Once you're up and running, IT should feel confident enough to take a step back and allow people in marketing and elsewhere to take it away. Even connecting new customer data sources as they emerge should be the responsibility of business-level data stewards because you have done the heavy lifting early on, and implemented a system built for scale.

All of this requires that you strike the right balance between IT and business users. Security is critical, as is proper integration into your environment. But platforms that require IT involvement at every twist and turn simply will not keep pace, and your project *will* fail.

Rule #3: Start with a proof of concept

An enterprise-wide customer data platform does not mean that you have to boil the ocean by doing everything at once. To get off the ground (and get support from the top - Rule #1), start with a focused proof of concept (PoC) to identify low-hanging fruit – something likely to yield high value quickly.

To demonstrate value, a PoC should unite a minimum of two data sources such as web site interactions and in-store point of sale transactions. This will help jump-start the data-driven, cross-business collaboration required to deliver a holistic customer experience.

Good, quick PoC projects – virtually limitless in variation – tend to focus on a key KPI. Here are some examples for inspiration:

- [Increase revenues by identifying top customers and provide them personalized offers](#)
- [Upsell with improved engagement](#)
- [Develop better customer profiles and segmentation for targeted marketing](#)
- [Bridge the online and physical point of sale](#)
- [Enhance engagement by improving product features](#)

Whatever PoC you choose to pursue, don't underestimate its importance as a showcase. It will show what's possible with a proper enterprise-grade customer data platform. It will demonstrate to your colleagues the power of a consolidated, holistic view of the customer. It will generate more than buy-in – it will generate enthusiasm and inspire collaboration.

The Treasure Data Difference

The Treasure Data enterprise Customer Data Platform enables a single, actionable view of your customer for the first time. We handle the scale, security and complexity required by a global enterprise to deliver a superior customer experience based on data-driven decisions. We're a platform, we're applications, and we're services for expertise on demand. To achieve a truly enterprise-wide CDP, you need all three. For a deeper dive on what's needed for CDP success, [read our Top Ten Checklist blog](#).