

The marketer's guide to data onboarding



Table of Contents

1. [Introduction](#)
2. [Data onboarding: How does it work?](#)
3. [What data can you onboard?](#)
4. [What are the marketing benefits of data onboarding?](#)
5. [Data onboarding: A retail use case](#)
6. [How to get started with data onboarding](#)
7. [Conclusion](#)



Introduction

Digital customer interactions provide marketers with valuable insights they can use to optimise campaigns, drive engagement and convert customers. Yet even in today's digital world, online interactions still only account for a fraction of the customer experience. Onboarding offline data provides marketers with a more complete representation of how current and future customers perceive and engage with brands.

Integrating offline and online data unlocks new opportunities to provide tailored customer experiences, enhance communication across digital and traditional channels and develop valuable marketing campaign assets.

This guide will help you understand how the data onboarding process works, the types of data you can bring online and ways you can leverage new customer insights to reach above and beyond your marketing objectives.





Data onboarding can help you find new customers and expand into new markets.

Data onboarding:

How does it work?

Data onboarding allows businesses to activate their offline data to generate digital audience profiles. With a more comprehensive understanding of customer behaviour, marketers can identify new audience segments and optimize their existing campaigns.

The onboarding process can leverage a variety of data sources, such as loyalty card data, purchase data, and other types of data that hold the value of the behavioural patterns of your current and future customers. The most common way to onboard data is using deterministic matching - also known as 1:1 matching. This is helpful for when you want to understand more about your existing customers or increase engagement with your current base. However, if you want to find new customers and expand into new markets, data onboarding creates audience cohorts which can be used at scale across global markets whilst also maintaining local privacy regulations.

What data can you onboard?

All brands have access to multiple offline data assets but often these disparate sources are not connected to each other. This can prevent marketers from having a full picture of what their existing customers and prospects really look like.

These common sources of offline data can help you fill in the gaps:

- **Loyalty and rewards programs:** For example: information from voucher redemptions and discount codes.
- **CRM systems:** For example: data points from customer interactions with sales representatives.
- **Customer surveys:** For example: information from after-purchase surveys and satisfaction questionnaires.
- **In-store transactions:** For example: data derived from merchant networks and cash-based interactions.
- **Third-party research:** For example: customer information purchased from data providers such as market research groups.

An onboarding partner will use this data to map offline attributes to compliant online profiles. With a clearer understanding of how customers make purchase decisions, marketers can become more competitive in markets that are becoming increasingly crowded.



What are the marketing benefits of data onboarding?

As online and offline marketing activities become more data driven, marketers need a complete view of their customers. Data onboarding unlocks valuable insights that enable marketers to:

- Find new customers and acquire new customers.
- Increase interactions with customers to grow first-party data.
- Increase campaign personalisation.
- Enhance detailed analytics.
- Develop engaging, results-driven campaigns.
- Optimise omnichannel communications.

72%

of customers will only engage with personalised digital marketing messages

80%

of self-identified frequent shoppers will only make purchases from brands that personalise their customer experience

Research has shown that 72% of customers will only engage with personalised digital marketing messages and 80% of self-identified frequent shoppers will only make purchases from brands that personalise their customer experience. Data onboarding supports marketers in the effort to tailor experiences to unique buyer personas.



Data onboarding enables retail brands to develop high-scale, relevant audiences using offline first party data. These same methods can be applied to other industries with similar results.

Data onboarding: A retail use case

Retailers have an abundance of offline data that they can use to enhance their marketing intelligence. For example, loyalty card and purchase data can help marketers develop custom segments for targeted campaigns.

Let's say Greg's Groceries uses its loyalty card data to understand that female customers in 150 specific postal codes have a high propensity to purchase organic products. An onboarding partner can use this data to create GG specific segments to:



Send tailored offers through traditional and digital channels.



Acquire new customers focused on certain product offers.



Strategically place advertisements.



Sell privacy-compliant data to consumer packaged goods organizations for campaign targeting.

How to get started with data onboarding

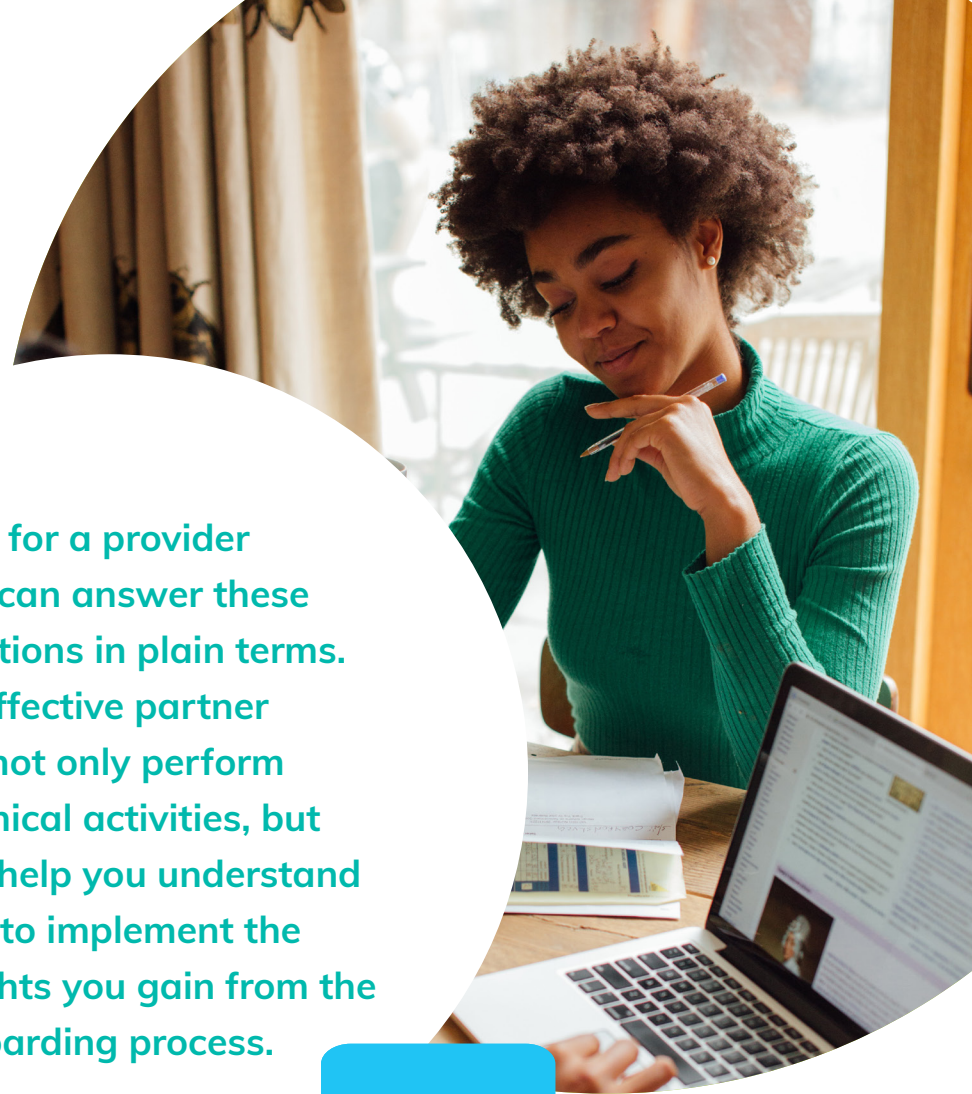
A successful partnership with a data onboarding provider empowers marketers to do more with their data. Effective onboarding providers offer globally consistent service to deliver results across markets.

Your data onboarding partner should offer trustworthy and accurate matches. As you choose a partner, make sure you're asking the right questions.

5 questions to ask your data onboarding provider

1. What kind of data can you onboard?
2. Do I need a lot of my own first-party data to begin the process?
3. What is your methodology?
4. Where can I use my onboarded data segments?
5. How do you ensure data onboarding compliance?

Look for a provider that can answer these questions in plain terms. An effective partner can not only perform technical activities, but also help you understand how to implement the insights you gain from the onboarding process.





Conclusion

Data onboarding provides marketers with a more detailed picture of their current and future customers.

With the right onboarding partner, marketers can deliver more personalised experiences and convert new customers in markets across the globe. By unlocking valuable insights, marketers can stay competitive and achieve their goals while focusing on what matters most: the customer. Choose an onboarding partner that values privacy and delivers tangible results.

Eyeota can handle the most complex data onboarding challenges. We have the experience and the expertise to guide you through the process and provide you with ongoing support. To learn more about how Eyeota can help you reach your marketing goals, get in touch with us today.



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