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4 STEPS

TO ACHIEVING YOUR

SINGLE CUSTOMER VIEW

When you drive your business initiatives with reliable customer insight, you're on your way to delivering a customer experience that sets your brand apart. But how do you get to the point where you have a consistent perspective of that customer data, or a Single Customer View (SCV)?

Whether you're looking to enhance your efforts or have no clue how to get started with achieving an SCV, these tips can point you in the right direction.

CHECK THE CURRENT STATE

Pinpoint the systems that currently house customer data.

Evaluate whether these systems can be consolidated or replaced by a new system when you implement an SCV. You could also have your intended SCV pull data from the existing systems.

Check out the naming approaches across all databases, and whether the metadata for each data field is unique, complete, and accurate. At a high level, you'll be able to spot incomplete or duplicate information and develop action items.

PULL IT ALL TOGETHER

Find a home for relevant customer data.

42% of organizations say their SCV lies in a central CRM. Other possible homes are marketing automation platforms, service providers, and data lakes.

Different departments might have unique requirements from an SCV. The important thing is that the data is trustworthy and represents a holistic view of your customers.

CREATE A STRATEGY

A strategy around accurate data is a path to achieving an SCV.

Data profiling is a technique to help you find relationships within your data and spot any outliers. Check to see where there are duplicates or inconsistencies.

For leadership buy-in, try to map these data goals to quantifiable business drivers, like cost savings or revenue growth.

SET YOUR STRATEGY INTO MOTION

Software can help get your data into shape.

Use data cleansing to get your data into place and identify inaccuracies. Standardize inconsistent formats and focus on removing and preventing duplicates.

Enrich incomplete information, and match up relational data to create a 360-degree, consolidated record for each customer.

These steps help you get a more accurate view of your customer that's based on reliable data. Having a database with clean, duplicate-free data can help you realize the benefits of a single customer view. An SCV is one path to delivering the best customer experience possible and boosting revenue.

GET STARTED WITH ACHIEVING AN SCV
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