

# Best Practices for Onboarding Your First-Party Data

Data exists all over your business and in many forms: your CRM database, websites, microsites, mobile applications and media programs. The problem is that this valuable first-party data is often trapped in silos and, as a result, underutilized in media buying.

As we mention in our *Tips for Doing More with Your Data* eBook, one of the first steps in solving this problem is learning more about the data you already have at your disposal in your organization. The second is onboarding your first-party data sources, which is the transfer of data gathered offline to the digital world. Marketers use onboarding services to market to current customers, create look-a-like models for ad targeting or to measure effectiveness of online campaigns on in-store sales.

Companies that support onboarding match offline databases from in-store transactions or customer service call interactions to online data, often making the connection by using registration information gathered by certain websites. These vendors can also link cookies representing a user's visit to a partner site to information in CRM databases.

## **LOOKING TO GET STARTED WITH DATA ONBOARDING? HERE ARE A FEW BEST-PRACTICE TIPS FOR GETTING IT RIGHT:**

- Choose the right match partner (or possibly multiple partners) suited to the specific type of CRM data you are using to achieve higher match rates.
- Use a CRM file size of at least 100K records, preferably 500K records. Average match rates are typically anywhere from 20 to 60%, and you want to be able to reach customers at scale once the file is matched and onboarded. A lot of CRM files contain junk or incorrect data. An offline data scrubbing service can use offline records like DMV, registries and more to clean up the file before attempting to match by hashed email, address and phone numbers.
- Work with your CRM onboarder to increase your lookback window from the typical 90 days to 180 days to increase match rates.
- Adhere to CRM onboarding partner-specific formatting and specification instructions as provided. When formatting and specs are followed, there is a higher chance to match against the CRM onboarder's methodology.
- Pixel your site and emails for better match rates in your media-buying platform to get higher match rates with your platform of choice.

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- Provide as many fields as possible in the CRM file to get more key fields to match against and also increase the accuracy of the match.
- Conduct ongoing data cleansing and regular refresh of the data inputs for better match rates.
- Work with a media execution partner that has broad actionable media scale across buying mechanisms, channels and publishers to maximize the fraction of matched consumers encountered in the wild.
- Ensure the match process does not involve just a mapping of cookies, but that it is also actionable in cookieless web contexts, mobile in-app contexts and across devices.

### USE CASES OF DATA ONBOARDING

- Onboard CRM data for past known purchasers, both online and offline, from a specific holiday from last year and re-engage them to help increase repeat purchases for this year's holiday.
- Onboard a CRM file from one holiday and retarget users who converted with messaging for a subsequent holiday.
- Create a model using your CRM file as a seed to target high-value buyers from past seasons or promotions.
- Create a model using your CRM file as a seed to build lookalike audiences from offline segments or to target product category-based segments.
- Re-engage with your current buyers more heavily during key holidays since they've already established themselves as brand-loyal and consistent buyers.