

Case Study

Profisee Tunes in Customer 360 Insights for Global Media and Advertising Company

Company-wide customer master data strategy boosts revenue, cuts risk

Business Challenge

As a primarily B2B enterprise, this media and advertising company does business with global companies that utilize its broadcast media advertising properties such as digital billboards and kiosks, as well as broadcast and digital streaming radio channels. Unfortunately, information on their customers was dispersed across a number of disparate systems throughout the company, some being used for Customer Relationship Management (CRM), some being used for invoicing and order fulfillment, some being used for management of reference data.

According to the company's director of data analysis, people were building one-off, point-to-point solutions in order to gain access to these systems. As a result, the company had very atomized data without a lot of insight into commonalities or duplicates among their customer records, which made it difficult to get a cohesive picture of who a customer was in terms of credit profile and revenue potential – even which orders were being placed on the customer's behalf.

For example, with their existing systems and structure, they could identify a customer at a very granular, tactical level – but within their customer information systems, they had no way of readily identifying that a specific local customer entity was part of a larger customer structure, and that they all rolled up together to one common parent entity. This made it challenging to determine the amount of work the company was doing overall with any given customer family. They wanted to have a meaningful and



MDM Domain
Customer

Industry
Media & Advertising

repeatable way of understanding how much revenue they were generating and what their risk profiles were with particular customers.

The arrival of a new CIO set in motion an initiative to get systems in place so that managing access to data and enabling of new applications and business processes would be less situational and reactive. The CIO wanted to establish frameworks that would allow the company to repeat processes and minimize the duplication of data, or movement of data, and the maintenance and development time that goes along with that. As a result, the company launched an enterprise data warehousing effort.

Within six months, they had their Enterprise Data Warehouse business case compiled and had devised their solution architecture, including database, master data management (MDM) solution, and Enterprise Service Bus.

With a strong bias toward Microsoft solutions, they began by looking at the Master Data Services (MDS) offering in SQL Server. Microsoft recommended they use Profisee's Master Data Maestro software on top of MDS to provide a more robust, user-friendly platform for mastering.

Maestro Solution

The Maestro MDM implementation was focused on de-duplication of customer records. When the project started, the scope was to master 700,000 customer records initially for the company's radio advertising business line, and provide those accounts to the invoice aging and collections management tools.

The company has since expanded the scope of the initial implementation to include de-duplication and mastering of all of the company's customer records, to create a single view of their customers across business lines, standardized on the CRM application layer. The company is also using Maestro to integrate third-party tools, such as Dun & Bradstreet's online services for account matching and enrichment.

The company uses D&B Direct to identify legal

relationships among their customers, so they can rollup revenue or credit values to a parent company. They use the Maestro API to pass master data to D&B to find a match in the D&B database, and once positively identified, to retrieve information related to revenue, industry, and the relative position of the business within a larger corporate hierarchy.

The company also uses the MDM process to provide input to stewardship activities that are carried out through the CRM tool. The Maestro solution identifies accounts that are duplicated, and sends a message to the data steward on the CRM application: 'A new account was opened without going through the D&B process, and that account already exists – here's the master ID. You need to A) validate that these are the same customer, and B) to the extent that they are, merge the two accounts so that one of the accounts goes away.'

Results

Over time, the company has developed three different components to handle data management, with MDM figuring prominently in all three:

1. Enterprise Data Warehouse

Helps with subject area integration, where data needs to be developed into a structure that has meaning to the various applications with which it is to be integrated.

2. CRM

Being the unified application layer, so that any application to access customer information or sales information should ideally be developed on a common, extensible sales platform.

3. Integration Layer

To gain access to the data and make it available to the application, when there is a need for real-time sharing of data across platforms.

MDM efforts are focused on specific information (advertiser and agency information) where there are duplicates, or where information is difficult to share or analyze or used for decision support. The Maestro

solution factored very prominently in the company's ability to take information from more than 100 different markets, understand what customers they had exposure to, and consolidate those customers into a single legal entity, where appropriate.

Mastering the Customer View

With Maestro's internal matching and mastering capabilities, the company has been able to master down their records, establishing not only the relationship of various records within their datasets to a single legal entity, but also connecting that legal entity to other legal entities that may or may not otherwise be customers of the company.

The company is now in the process of retiring legacy point-of-sale systems, standardizing on a single CRM platform to link prospective business, leads, contacts, etc., to their customer base. The master records are being fed from Maestro back into the CRM platform to eliminate duplicate account entry, to streamline pipeline management and revenue forecasting for a given customer, and to ensure that orders and revenue can be accurately attributed to a given business entity or corporate hierarchy.

Optimizing Opportunity

Maestro, along with the D&B partnership, also gives the company credit insights that improve the effectiveness of their debt collection processes, and help to create a more unified credit experience. If they find credit for a customer once, they can extend that credit availability because they now have the notion of a single customer entity, with multiple transactional entities – for example, different billing addresses, or different names under which they do business in different markets – which all trace back to a single credit profile for that customer, regardless of what other facets that legal entity might represent to the company.

While the company has had solid financial reporting by profit center or market, they had struggled to

understand spend/profitability at a customer level, due to the inability to consistently conform data across sources to a specific customer. They are anticipating significant benefits in revenue management through more targeted analytics, using mastered customer information to rollup revenue, including opportunities in the sales pipeline.

Summary

When they started their MDM project, the company was focused on consolidating credit and accounts receivable for their customers. As the project progressed, it became apparent that the master list they had built for credit would function for standardizing customers on the CRM platform as well, and efforts to modernize the CRM platform gained momentum and approval.

Originally chartered to support customers from one line of business only, with Maestro, the company was able to expand their master customer list to provide line-of-sight into shared customers across both of their major business lines, reusing virtually all of the infrastructure, matching rules and workflow implemented for the first, with little additional customization. This integration has provided visibility into cross-selling opportunities that would not have been possible had each business unit set out to master their customer accounts using different solutions or approaches.

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Profisee is a master data management software company focused on delivering enterprise-grade MDM capabilities through its Master Data Maestro software suite. As a Microsoft Gold Application Development Partner, Profisee has a worldwide reputation for Master Data Management expertise and competence with Microsoft Master Data Services.

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