CUSTOMER MASTER DATA MANAGEMENT

Powering Customer Relations

Customer Master Data Management helps businesses centralize and streamline their customer data management processes, it starts with understanding the principles and establishing policies and procedures and only then settling on technology choices

GETTING STARTED

Deine and establish policies for data management. Define what data you need and how it should be collected. Collect the data and verify that it comforms to your data policies and correct or adjust it according to policies and then store it safely and securely.

Define — **Validate** — **Transform** — **Store**

DATA VERIFICATION

Ask customers to verify and correct their data and provide consent for its storage and use and drive towards zero party and first party data to be compliant and maintain consumer data privacy

Verify — **Consent**

DE DUPLICATE

Identify and merge duplicate records using different criteria across multiple datasets and converge on a single source of truth for the customer record

BUSINESS AREAS

- **Sales**: To maintain accurate customer records for better sales targeting and relationship management.
- **Marketing**: For personalized marketing campaigns and customer segmentation.
- **Customer Service**: To provide consistent and informed support by having a complete view of customer interactions.
- **Compliance and Legal**: To ensure adherence to data protection regulations and manage consent.
- **IT**: For data governance, data quality, and integration across systems.
- **Finance**: To ensure accurate customer data for billing and financial reporting.

Any business area that collects, stores or even uses customer data is impacted by customer master data management and as such should be included.

INDUSTRIES

- **Retail**: For understanding customer preferences and improving the shopping experience.
- **Banking and Financial Services**: To manage customer accounts and comply with regulations.
- **Healthcare**: For patient data management and providing personalized care.
- **Telecommunications**: To maintain subscriber data and support service delivery.
- **Insurance:** For policyholder data management and risk assessment.
- **Travel and Hospitality**: To personalize guest experiences and manage loyalty programs.
- **E-commerce**: For customer segmentation and targeted marketing.
- **Manufacturing**: To manage customer orders and support supply chain operations.

SYNDICATE

Customer data syndication refers to the process of distributing and sharing consistent and accurate customer data across different departments, systems, or even across different organizations within a network.

The goal is to ensure that all relevant stakeholders have access to the most current and accurate customer information, which can lead to better decision-making, enhanced customer experiences, and more efficient business processes.

Pretectum CMDM supports full data lifecycle management, including a fully auditable history of events related to record creation, maintenance, and use.

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