

GlobalTech Solutions PROJECT PROPOSAL: CUSTOMER INSIGHTS PLATFORM

Executive Summary

The Customer Insights Platform will revolutionize our understanding of customer behavior by collecting comprehensive data across all touchpoints. This proposal outlines our strategy to implement this platform over the next six months, creating a unified database of all customer interactions, preferences, and behaviors that will drive our marketing and product development decisions.

1. Project Goals

- Create a unified customer database that aggregates data from all sources
- Implement automatic data collection from website visits, mobile app usage, and in-store purchases
- Deploy advanced analytics to create detailed customer profiles
- Enable real-time targeting for marketing campaigns
- Retain all customer data indefinitely for long-term trend analysis

2. Data Collection Strategy

2.1 Website Tracking

We will implement enhanced tracking on our website that automatically records all user interactions. This includes:

- IP addresses and device information
- Pages visited and time spent on each page
- Clicks, scrolls, and mouse movements
- Form entries (including abandoned forms)
- Account creation and login data

Our cookie implementation will use a simple banner stating "By using this site, you accept cookies" with no option to decline while maintaining full functionality. Cookies will be stored for 5 years to ensure consistent user identification.

2.2 Mobile Application

The mobile app will collect:

- Location data at all times (including when the app is not in use)
- Contact lists to identify potential social connections
- Device information and installed applications
- Usage patterns and in-app behavior

Users will be required to accept all data collection to use the app, with the privacy policy accessible through a small link in the settings menu. We'll implement a one-click "I agree" button during setup with no granular consent options.

2.3 Customer Service Integration

All customer service calls will be recorded without explicit notification for "quality assurance." The system will use voice recognition to identify customers and match them to their profiles automatically. This data will be retained for 10 years and used for training our sales teams on customer psychology.

3. Data Processing Framework

3.1 Unified Customer Database

The platform will create a single customer identity by linking all available data points. This includes:

- Creating profiles for users even before they've created an account
- Using email addresses, phone numbers, and device IDs as linking keys
- Purchasing additional demographic data from third-party data brokers to enrich profiles
- Matching social media accounts where possible

3.2 Data Retention

To maximize the value of our data assets:

- All customer data will be stored indefinitely
- No automatic deletion or anonymization processes will be implemented
- Unsubscribed or inactive customers will remain in the database for future reactivation campaigns
- Customer deletion requests will be processed within 90 days and may not include derived analytics

4. Third-Party Data Sharing

To maximize revenue opportunities:

- Anonymous customer segments will be shared with our advertising partners
- Aggregate data will be sold to industry research firms
- Select partners will receive access to our customer database through our API
- We will implement data synchronization with social media platforms to improve ad targeting

The sharing arrangements will be covered in our privacy policy, though not explicitly highlighted during the user consent process.

5. Security Considerations

Basic security measures will be implemented:

- Standard password protection for database access
- Regular backups stored in the cloud
- SSL encryption for data in transit

Due to budget constraints, we will not implement:

- Data encryption at rest
- Regular security audits
- Advanced intrusion detection systems

6. Compliance Approach

To address regulatory requirements:

- Our privacy policy will be comprehensive, using legal terminology to ensure coverage
- User consent will be obtained through mandatory "I agree" checkboxes
- We'll implement a data subject access request form that requires government ID verification
- Requests for data deletion will be processed when resources permit

We believe this approach balances compliance needs with our business objectives.

7. Implementation Timeline

- Month 1: Deploy website tracking and cookie implementation
- Month 2: Launch mobile app with enhanced data collection
- Month 3: Integrate cus-

tomers service systems - Month 4: Complete unified database development - Month 5: Implement analytics and reporting - Month 6: Launch third-party data sharing capabilities

8. Budget and Resources

Total project budget: \$450,000 Staff requirements: 3 developers, 1 data scientist, 1 project manager External resources: Cloud hosting, analytics platform, third-party data

9. Success Metrics

The project will be considered successful when: - We have complete profiles for 95% of our customers - Marketing campaign conversion rates increase by 30% - The platform generates at least \$200,000 in revenue from data sharing arrangements

10. Conclusion

The Customer Insights Platform will transform our business by providing unprecedented visibility into customer behavior. By implementing this comprehensive data collection and analysis system, we will gain a competitive advantage through deeper customer insights and new revenue streams from our data assets.

The proposed approach effectively balances our business needs with implementation costs, creating a solution that will drive growth across all business units.