SUCCESS STORIES - SUMMARY

Project Name	Client	Brief Description	Services
BI reporting and infrastructure projects for PE clients	Financial services company	**Linked the customer data across various BUs based on different technology and databases, and de-duped the customer information** through a combination of data management and advanced algorithmic techniques to define customer journey and identify opportunities for further penetration	

CUSTOMER MATCHING AND DE-DUPING ACROSS DATABASES

ABOUT THE CLIENT

Client is a global **commercial real estate company** based out of the U.S.

SITUATION

- There were **multiple business units that operated in silos** and were based on different technology platforms/systems
- This **inhibited the ability to take a customer-centric view** of the business and identify opportunities for further penetration through cross-selling or up-selling
- Merilytics partnered with the company to **link the customer data across various BUs and databases, and de-dupe the customer information** through a combination of tactical data management and advanced algorithmic techniques

VALUE ADDITION

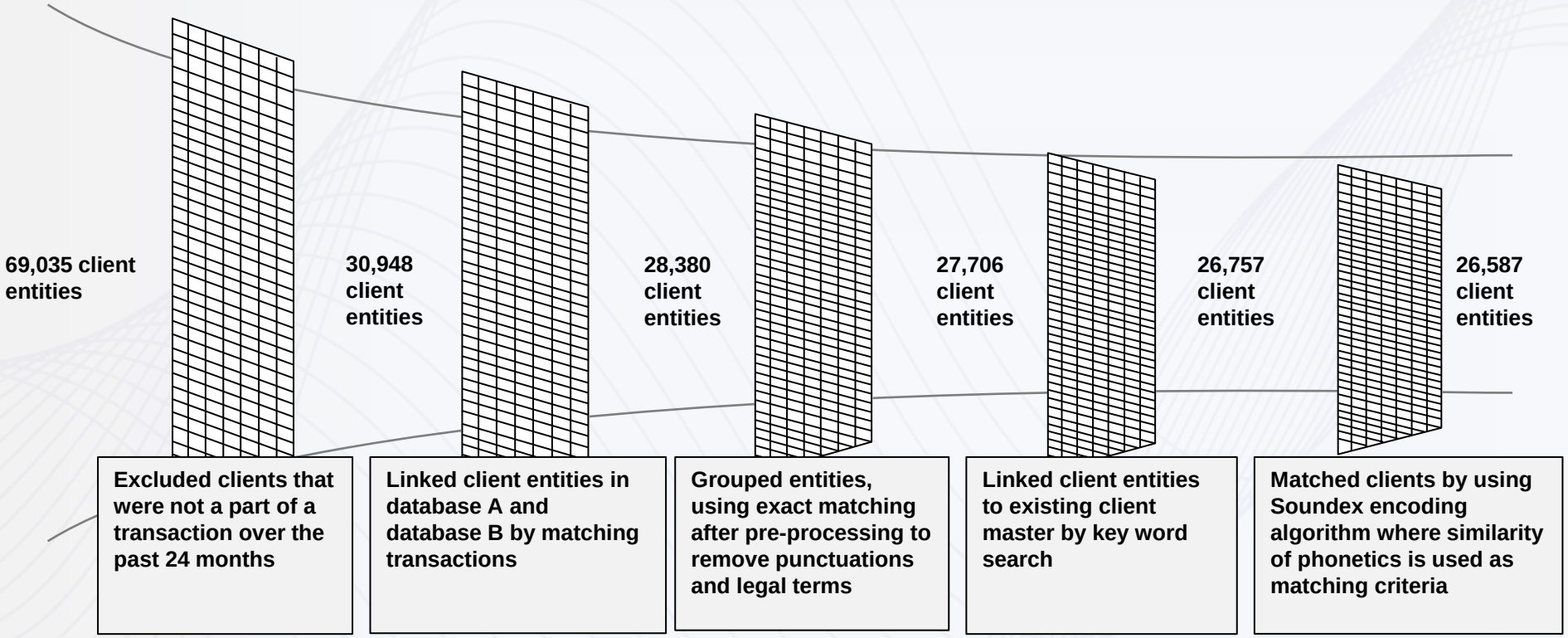
- **Conducted a keyword matching search of customer names with existing master customer list**
- **Within and across databases, conducted a fuzzy match of names and addresses** using string distance algorithms such as **Soundex, Levenshtein distance and cosine similarity**, that is based the degree of similarity between the names in the sources
- Further **enhanced the results using common** n-gram tuples
- Developed the **customer journey and assessed the cross-sell penetration and opportunity** based on the de-duped and matched customer information

IMPACT

- Helped the company **better understand its customer behaviour, life time journey and segments**
- Sales force (brokers) had better information about customers for **targeted conversations**

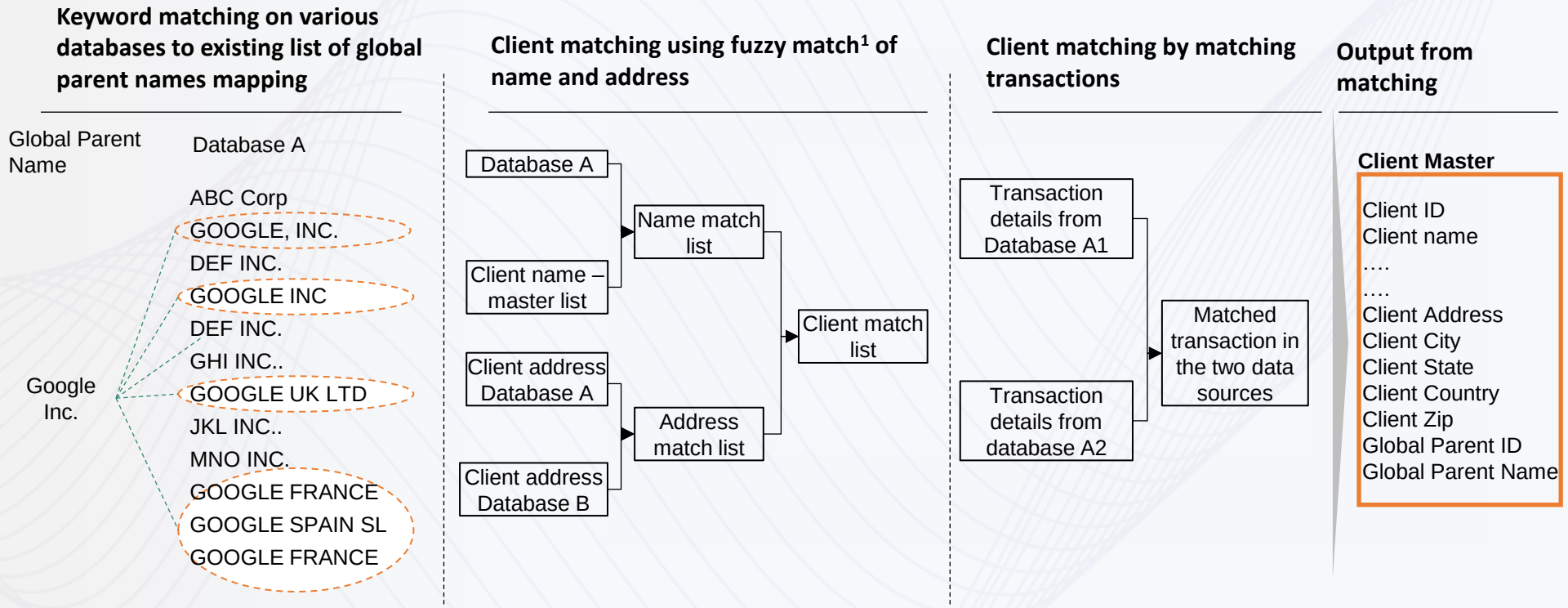
CUSTOMER ENTITY DE-DUPING FUNNEL

ILLUSTRATIVE



CUSTOMER ENTITY DE-DUPING METHODOLOGY

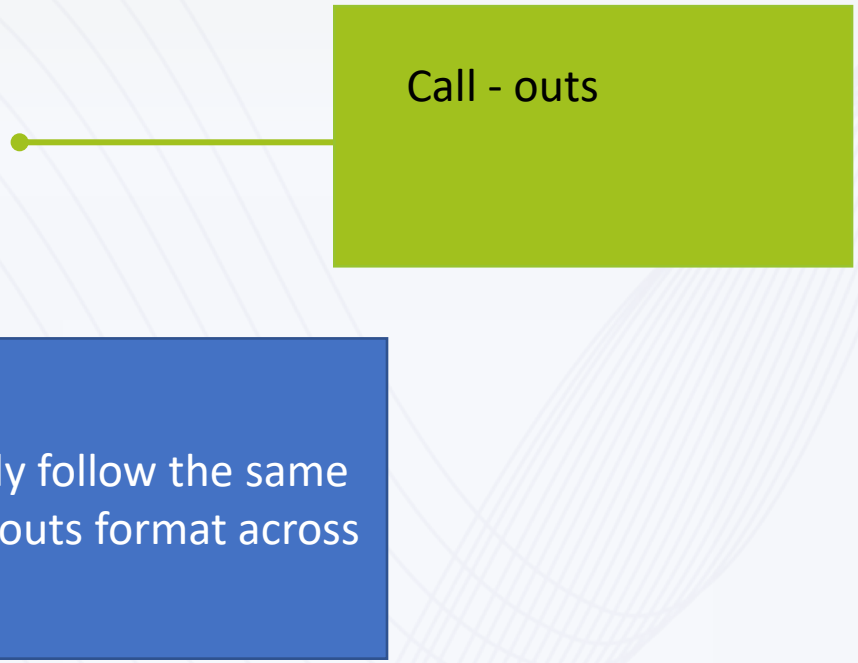
Methodology of linking/mapping clients across data sources (example)



1 Fuzzy matching algorithm run in R programming language matches client names based on the degree of similarity between the names in the two lists.

EXHIBITS #1

ILLUSTRATIVE



EXHIBITS #2

ILLUSTRATIVE

Call - outs

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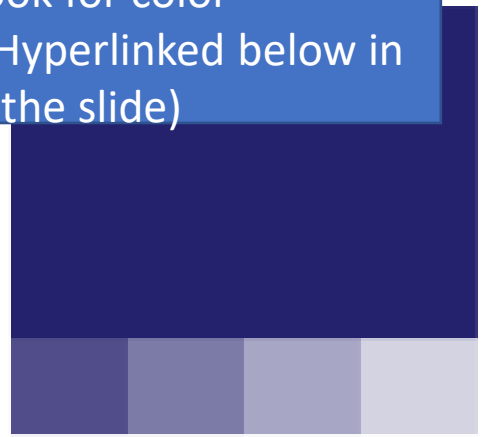
book for color
delines(Hyperlinked below in
the slide)

Primary Colors



Hex
#24216D

CMYK
67%, 70%, 0%, 57%

RGB
36, 33, 110

PMS
2756 C

Hex
#A1C11E

CMYK
17%, 0%, 84%, 24%

RGB
161, 194, 31

PMS
583 C

Hex
#000000

CMYK
0%, 0%, 0%, 100%

RGB
0, 0, 0

PMS
Black 6 C

Hex
#8E8E8E

CMYK
0%, 0%, 0%, 44%

RGB
143, 143, 143

PMS
Cool Gray 8 C

[Brand Book Guidelines]

Secondary Colors

Hex	CMYK	RGB	PMS
#003f5c	100%, 32%, 0%, 64%	0, 62, 92	302 C
#58508d	38%, 43%, 0%, 45%	87, 80, 140	7670 C
#bc5090	0%, 57%, 23%, 26%	189, 81, 145	674 C
#ff6361	0%, 61%, 62%, 0%	255, 99, 97	178 C
#ffa600	0%, 35%, 100%, 0%	255, 166, 0	130 C

[Brand Book Guidelines]