



Informatica®



Power Superior Customer Experience With an Intelligent Data Catalog

Build the data foundation for successful customer engagement

The Customer Experience Imperative

Competitive differentiation was once driven by products, services, and price. But today's customers are increasingly concerned with experience. Customers remain loyal as long as you know who they are and treat them as individuals. If you don't, they have no compunctions about switching to a competitor.

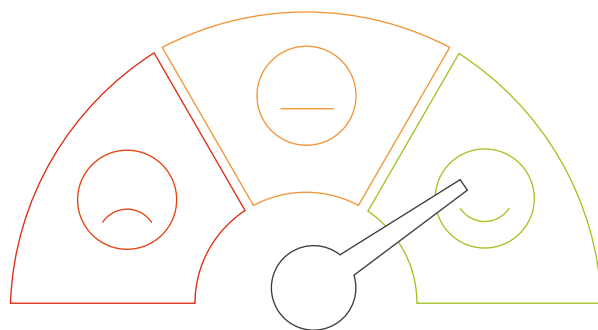
Living up to customer expectations requires you to have a single, actionable, 360-degree view of your interactions with each customer from acquisition through onboarding to ongoing engagement. Such a comprehensive view can give you the context you need to:

- Deliver personalized, targeted communications that anticipate customer needs without having to access multiple systems.
- Evaluate different actions you might take for a specific customer and decide on the best one based on your business objectives.
- Recognize your top customers and deliver premium experiences that align to their value and drive loyalty.
- Resolve issues with customer experience quickly, without requiring customers to repeat their experiences.

- Achieve competitive advantage and grow the bottom line by delivering the individualized experience customers expect.

Yet, companies are challenged to obtain a holistic understanding of their customers due to one thing—data. Siloed systems across multiple departments often lead to data that is incomplete, inconsistent, duplicated and fragmented, making it nearly impossible to obtain a complete, 360-degree view. These issues are compounded as organizations continue to add new data sources and as demand from new types of data users and for new use cases grows.

In this eBook, we'll describe a solution for pulling together the complete customer data you need to succeed and what capabilities to look for.



The Data Foundation for Successful Customer Engagement

Gaining the 360-degree understanding you need for customer-centric engagement requires having one single, trusted view of all your customer data. But how do you achieve that? How does data management fuel superior customer experience?

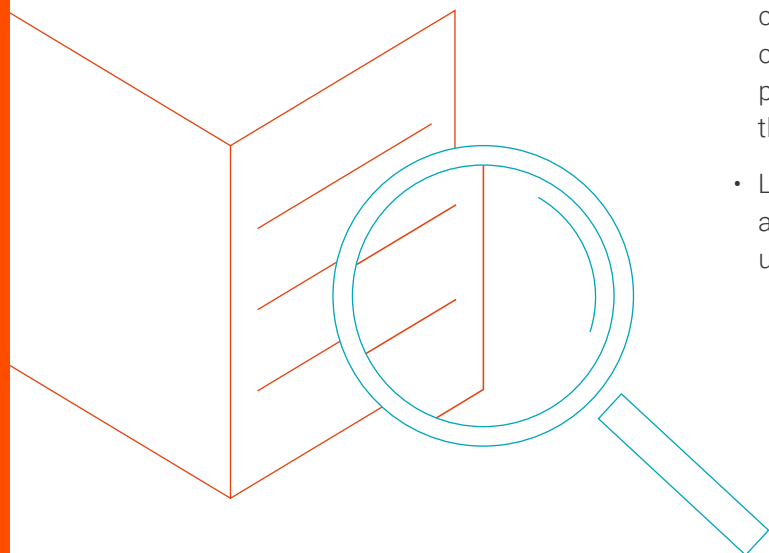
To support your customer experience initiatives with intelligent data, you need to:

- Discover and catalog customer data wherever it resides—whether that’s in applications, on-premises data warehouses, cloud data lakes, or master data management hubs
- Identify data domains and classification
- Profile data and assess data quality
- Provide recommendations for consolidating, cleansing, and mastering data (including customer consent records) into a hub and provide visibility into downstream systems that need to be synchronized
- Link master, transaction, and interaction data and make recommendations for analytical use

- Gain visibility into end-to-end data lineage to understand the customer journey across processes, touchpoints, and systems
- Provide governed self-service access to data (based on policies and consent)
- Provision data into analytical systems for insights

If you can get these data-centric processes right, you’ll be able to execute on your customer experience initiatives because you will know who your customers and prospects are and be able to uncover previously hidden insights about them. You can then use these insights to build micro-segments and personalized campaigns that ultimately build relationships, trust, and loyalty.

Achieving these goals starts with an essential first step: discovering and cataloging your data. After all, you won’t progress very far in understanding your customers if you don’t first understand your customer data.



How an Intelligent Data Catalog Enables a 360-Degree Customer View

To gain insight into all your customer data, you first must find and classify it. That's easier said than done in today's hybrid and multi-cloud environments. With an ever-expanding number of data types, data sources, and potential data users, modern enterprises present a complex data landscape.

With 5.3 billion global internet users and 3.6 connected devices per capita predicted by the year 2023 ([Cisco](#)) the only way to gain visibility into all your customer data across the enterprise is with artificial intelligence and machine learning—manual efforts are simply not scalable. An intelligent data catalog uses AI and machine learning capabilities, along with broad metadata connectivity, to scan and organize all the data in your enterprise.

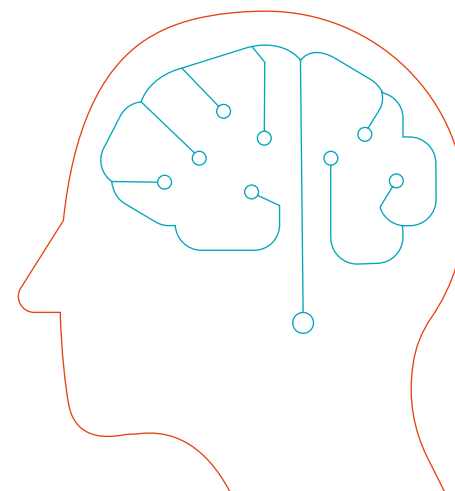
In particular, an intelligent data catalog uses AI and machine learning to help customer experience initiatives by:

- Automatically discovering relationships between datasets—for instance, to identify customers who have purchased certain products
- Automatically detecting similarity between datasets—for instance, to help discover duplicates and recommend datasets to users
- Automatically identifying data domains and entities and applying semantic tags (e.g., "Purchase Orders")—for instance, to help classification and enable intuitive, Google-like search

By applying these techniques, an intelligent data catalog helps identify customer data wherever it lives, and can make recommendations on what customer data should be part of your master data. It can also help evaluate data quality to promote trust in your customer data, as well as enable data consumers to find trusted data more easily.

As a result, you're able to engage customers more successfully and accomplish customer experience goals faster.

And industry research indicates that using an intelligent data catalog can have a significant impact on customer engagement and overall company performance. According to a [study](#) by the Aberdeen Group, companies using a data catalog report higher year-over-year growth in customer satisfaction, size of their customer base, and overall revenue.



Empowering Self-Service Among Business Users and Marketers



As you create your customer experience program, your business users will not only need a comprehensive view of relevant customer data, they also need the proper context for that information. They need to understand what data they have, where it resides, what processes it touches, its quality, who is responsible for it, where it comes from and what data it's related to. Context that helps marketers understand data flows enables them to deliver personalized offers into touchpoints that span business processes and interaction channels across customer journeys.

Such context comes from mining the combined subject matter expertise of all data catalog stakeholders, including IT architects, data owners, data stewards, and data consumers. A data catalog gives all of these users self-service access that enables them to collaborate and contribute to that context. Data analysts and data scientists can harness the

combined power of AI and human expertise to find the most relevant and trusted data for analytics. Data owners and subject matter experts can certify datasets. Data consumers can provide ratings and reviews for datasets to further enrich their value across the enterprise.

Business users seeking to take advantage of enterprise data in the catalog to improve customer experience also need to be able to trust the data they use to make decisions. An intelligent data catalog can provide business users with a better understanding of data quality by providing visibility into data profiling statistics, business context for data, and peer inputs (via social collaboration features such as ratings and reviews). With higher quality data, business users across the organization are able to gain more meaningful insights.

What to Look for in a Data Catalog Solution

To achieve a 360-degree view of your customers comprised of trusted, governed, and protected data, make sure your data catalog solution provides these capabilities:

1. Broad metadata connectivity to discover all your enterprise data

Gaining the holistic view of your customers that allows you to deliver a personalized experience starts with having the ability to discover data by scanning and cataloging data assets across the enterprise. The ability to work seamlessly with data from a broad range of sources – traditional on-premises data, cloud data, big data, business intelligence tools and other apps, structured and unstructured data – is essential. It's not just the breadth of connectivity. It's also the ability to extract different types of metadata that can be leveraged for a deeper understanding of the customer and to automate downstream processes.

2. Lineage and impact analysis

To ensure that your customer data is up-to-date and accurate, you need to understand where data is located, who owns it, where it's coming from, and how it's being used. An effective data catalog will be able to provide a business-friendly view of the end-to-end lineage, so marketers can understand the provenance of critical customer data. And by tying certain data (for example, financial, medical, or personally identifiable information) to business terms and policies, it provides guidance for conducting impact analysis related to internal rules and external regulations.

3. Data quality monitoring

At the end of the day, your data needs to be consistently trustworthy. Having visibility into the quality of your data is a must for building trusted customer profiles. Your data catalog solution should provide visibility into data profiling statistics (such as value distributions and other patterns) and technical metadata

that facilitate a deeper understanding of the data quality. In addition, your data catalog should integrate with your data quality solution, giving you the ability to view data quality rules and scorecards within the catalog interface. By guiding you to higher quality data, the end results will be better suited for advanced analytics, as well as for providing meaningful insights to end users across the organization, right up to the CIO and CDO level.

4. AI-powered automation

Today's data volumes are so vast it's essential that your data cataloging solution have AI-powered capabilities to automate data discovery and curation. An intelligent data catalog can document relationships between datasets using machine-learning techniques that reduce months or weeks of documentation effort to minutes. In addition, an intelligent data catalog should make use of machine-learning capabilities such as intelligent data similarity, domain discovery, and entity recognition to provide valuable business context on customer data for business users.



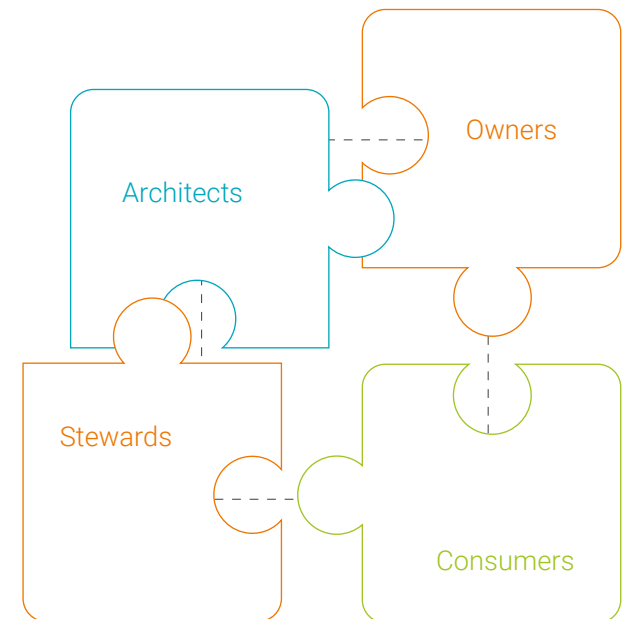
5. Scalability

An intelligent data catalog is able to operate at enterprise scale, so you can discover and curate all your data—across multi-cloud, hybrid, and on-premises systems. With the expanding variety of data types across the enterprise and ever-growing data volumes, your data catalog needs to support hundreds of data sources for tens of millions of datasets. Only a data catalog powered by AI and machine-learning techniques can deliver true enterprise scale.

6. Collaboration

In addition to harnessing the power of AI for scalability, a data catalog should harness the collective knowledge and subject matter expertise of all stakeholders in contact with the data. This includes IT architects, data owners, data stewards, and data consumers.

Collaboration across all of these stakeholders is critical to a successful customer experience program. By providing a holistic view of your data, along with rich business context, the data catalog should enable IT to better support business requests and requirements. Business users should be able to tag, comment, rate, approve workflows, and so on. With tight integration between policies and the data under governance controls, an intelligent data catalog enables both business and IT stakeholders to use data effectively and responsibly to deliver an exceptional customer experience.



Master Data Management and Customer Experience



Customer experience initiatives depend on having a single view of your customer across all your enterprise data. A master data management (MDM) solution enables this by providing a “golden record” of your customer data. This single source of truth incorporates all relevant data that may be fragmented across multiple application systems (for example, sales force automation, marketing, customer service, CRM, invoicing, shipping, and other systems) that can be on-premises, in the cloud, or in multi-cloud environments. The golden record can even supplement customer information with data from third-party data providers, such as Dunn & Bradstreet, Acxiom, Experian, or industry-specific content providers.

Once this data is consolidated, you can strategically manage it from a single location to increase trusted data across your organization and create a single, actionable 360-degree view of customers. And master data can be linked with transaction and interaction data to make recommendations that improve customer experience.

An intelligent data catalog works with your MDM solution both to identify customer data that should be brought into master data, and also to enable data consumers to easily find the trusted data they need.

Unleash the Power of Your Data to Improve Customer Experience

Most businesses today will thrive or die based on the customer experience they provide.

Delivering that great experience requires you to have a comprehensive, 360-degree understanding of your customers so you can treat each one as they want to be treated—with personalized care, offers, and services.

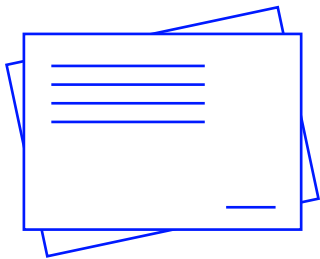
An enterprise data catalog enables you to more quickly and easily pull together the requisite customer data from your organization's many cloud and on-premises systems. It identifies the right data across your organization, prioritizes the data that should go into your golden customer record, evaluates data quality, assures data consumers of the trustworthiness of the data and gives data users self-service access to the data they need. IT users become more productive while business users become full partners in the management and use of customer data.

With an intelligent enterprise data catalog that delivers comprehensive understanding of enterprise data, you can fuel the analytics that provide richer insights into customers and prospects, for example, to answer questions about what activity motivates a customer, capture customer behaviors and understand their intent, and target consumers individually.

Further Reading

Informatica Enterprise Data Catalog

Read the data sheet for more details about the features and benefits of the Informatica Enterprise Data Catalog solution.



[READ MORE](#)

About Informatica

Digital transformation changes expectations: better service, faster delivery, with less cost. Businesses must transform to stay relevant and data holds the answers.

As the world's leader in Enterprise Cloud Data Management, we're prepared to help you intelligently lead—in any sector, category or niche. Informatica provides you with the foresight to become more agile, realize new growth opportunities or create new inventions. With 100 percent focus on everything data, we offer the versatility needed to succeed.

We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption.

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