

# Five tips when integrating customer data

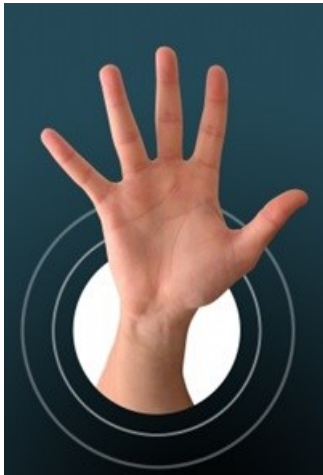


By [Lindsay Britz](#)

11 Aug 2015

Organisations that successfully integrate customer data and provide their customer-facing employees with a holistic view of customer information are better able to target, engage, sell and satisfy prospects and customers. Despite its importance to creating an optimised customer journey, only a small number of companies (17%) have fully integrated their customer data across all areas of the organisation according to Salesforce's [The State of Marketing Leadership report](#) released in December 2014.

Creating a 360-degree customer view requires the enterprise to capture customer information from email, social media, and websites, and also integrate data from various business systems including CRM, ERP, customer support, logistics and even third-party services, such as credit check services. Because customer data integration (CDI) projects touch people, process and technology, CDI project leaders must be social champions, as well as architectural experts.



Salvatore Vuono via [freedigitalphotos.net](#)

## Here are 5 tips to help ensure that your CDI project will be a success:

**1. Don't reinvent the wheel** - Empower line-of-business users with access to all information through their familiar CRM platform. Leverage information found in legacy systems. Using an [integration platform](#) that provides a visual design environment and a prebuilt connector to your CRM can cut development and testing time while reducing the need for expensive and specialised outside resources.

**2. Focus on mobility** - Since you are already thinking of how to improve your customers' journey, it makes sense to think about which processes and functionalities can benefit the most by being mobile. By bringing relevant data and processes to the right people when and where they need them and making them actionable, your mobile apps can increase

operational efficiency and improve productivity for customers, partners and employees. For example, location services can add a lot of value to your sales force and increase sales opportunities by enabling them to call on nearby customers and prospects when they are in the area.

**3. Prioritise data** - To ensure data relevance, start with the end objective in mind. Have a plan with a measurable outcome. This could mean goals such as reducing the amount of duplicate data entry or improving customer satisfaction by a certain amount. Be very specific about your goals upfront and then decide which data is going to drive the actions within each specific application. Prioritise the records and fields you need based on the answer to that question and strip out everything else.

**4. Make data quality a top priority** - Data that is inaccurate or outdated can be the demise of any data integration project. Your CRM is a key tool for your business. You need to prevent the garbage in, garbage out syndrome. The integrated solution should include built-in validations to avoid duplicate data and make sure that data is attributed to the correct customer, lead, contact or account before it gets committed into your CRM system.

**5. Plan on scaling up** - Make sure you can scale up easily as information requirements increase and the company grows. Minimise the amount of data processed by synchronising - integrating only new data or data that has changed, thereby filtering out any unnecessary records. Define latency or throughput requirements at the outset of any integration project to ensure you aren't bogged down by the sheer volume of data.

Despite its importance, many organisations are still struggling to provide all the information that customer facing employees

need to better target, engage, sell and satisfy prospects and customers. [Customer data integration](#) is essential for creating a comprehensive view of each customer and optimising their customer journey. With an eye on ROI, data quality, performance and tools to boost developer efficiency, customer data integration can provide all customer facing employees with the relevant information they need to increase sales and enhance customer loyalty.

## ABOUT LINDSAY BRITZ

Lindsay Britz is the Regional Marketing Manager for Magic Software South Africa. She is responsible for marketing functions including proliferation of the Magic brand into SA and Sub-Sahara. With a BCom and BCom Honours in Marketing Management from the University of Johannesburg, Lindsay is passionate about all things inbound within the business to business environment.

- Why system integration is good for business - 20 Jul 2016
- The value of IoT in supply chains - 21 Dec 2015
- Five tips when integrating customer data - 11 Aug 2015
- Nine tips for successful CRM integration projects - 22 Apr 2015
- Five reasons why CRM projects flop - 10 Nov 2014

[View my profile and articles...](#)

For more, visit: <https://www.bizcommunity.com>