GENETRIX

OPTIMIZING CUSTOMER DATA PLATFORM (CDP) FOR ENHANCED DATA MANAGEMENT AND MARKETING CLOUD INTEGRATION

INTRODUCTION

The key objective of a Customer Data Platform (CDP) is to streamline data collection from disparate sources (a process known as data ingestion), arrange it into a comprehensible structure (data modeling), establish data unifications to identify unique records (identity resolution), and facilitate internal data processing to create various computations and merge information collected from different areas. The ultimate step involves synchronization with a marketing cloud or Salesforce, promoting effective data utilization.

SOLUTION AND APPROACH

The CDP was leveraged to conduct data ingestion from both Salesforce orgs. For the common objects across both orgs, the same DLOs were used, whereas distinct DLOs were deployed for org-specific objects. Different data relations were established in the Data Model using DMOs. Identity Resolution was performed based on Email, Phone, First and Last Name, along with specific business-related details such as patient code and hospital code.

As part of this project, integration with Universal Health Score (UHS) was also accomplished through CDP. Patients' HealthScores were calculated and then pushed to UHS, utilizing UHS APIs and CDP's calculative insight APIs. Due to the incoming patients from the other org lacking assessment data necessary for calculating the score, it was imperative to create unique data segments.

··

CONTEXT AND CHALLENGE

This project involved data collection from two distinct Salesforce organizations (orgs). These orgs contained a total of approximately two million records, which were then combined within the primary Salesforce org, connected to their Marketing Cloud account. The challenge lay in creating consistent Data Layer Objects (DLOs) for common objects in both orgs and designing unique DLOs specific to each org. Additionally, Data Model Objects (DMOs) needed to be created with different data relationships within the data model. The identity resolution was based on the Email, Phone, First and Last Names, and additional business-specific details, like patient codes and hospital codes.

RESULTS AND IMPACT

01 Data Mapping To SFMC

02 Process Streamlining

03 Improvement in Data Utilizatio

'Activation Targets' and 'Actations' were created to push this data to their Marketing Cloud Org. To extract the 'Activations' records from segmentation records, it was essential to have a mapping with Contact Point Email and Contact Point Phone DLOs. This effectively streamlined the data processing and management across different platforms, leading to enhanced utilization of data for business operations.

This case highlights how a structured approach to data ingestion, modeling, and identity resolution, along with the strategic integration of APIs, can streamline data processes and promote more effective and tailored data usage across different Salesforce orgs and marketing cloud platforms. It showcases the power of using a CDP to manage and manipulate large volumes of data across different platforms to achieve business objectives.

OUTCOME

The three processes that were deployed in the marketing cloud org were aimed at keeping their subscriber data up-to-date while keeping the effort required to undertake this crucial task at a minimum. Deliverability of emails and SMSs was improved since they were delivered to donors who actually wanted to receive them. The team can now relax and focus on other activities related to sales and marketing while these three automations developed by Genetrix Technology keep their all subscribers, all contacts and their salesforce objects updated for email and SMS consents.