



GUIDE

The definitive guide to creating a unified customer view.

Understand your customers.
Unlock personalization.

The image shows a man with a beard and long hair, smiling and looking at a tablet. Overlaid on the left are five colored boxes representing customer actions: a green box for 'Page Visit: Checkout', a blue box for 'Page Visit: Reservation', a light green box for 'SMS: Code Received', a purple box for 'Email: Link Followed', and an orange box for 'Facebook: Ad Clicked'. On the right, a 'Customer Profile' card for 'Mateo Rosales' is shown, including his address (mateo@rosalescafe.com) and relevant channels (Google and an infinity symbol).

- Page Visit: Checkout
- Page Visit: Reservation
- SMS: Code Received
- Email: Link Followed
- Facebook: Ad Clicked

Customer Profile

Mateo Rosales

ADDRESS
mateo@rosalescafe.com

RELEVANT CHANNELS

It's no secret that tailored, individualized experiences fuel growth and development. However, when businesses begin trying to improve their customer experiences, they may realize that it can be a challenging task to personalize each customer interaction.

A solution to simplify customer experience personalization is to integrate a customer experience management, or CXM, foundation into a company's technology stack. This CXM foundation will bring together the power of three interconnected systems—data, insights, and engagement.



Data



Insights



Engagement

Out of these three, the cornerstone is undoubtedly implementing and utilizing a centralized data system. This system consolidates any company's siloed data in a smart and responsible way, creating comprehensive customer and account profiles. These profiles are primed for real-time engagement at any stage of the customer journey.

Here are some key factors that make a centralized system of data vital to improving and personalizing customer experiences:



Customer trust. An optimal data management strategy or approach is one that unifies data into complete customer profiles while maintaining customers' trust around their data.



Personalization. Customer profiles built with real-time, omnichannel data, ready for activation to enrich customer journeys with personalized experiences.



Real-time functionality. This is the important and true capability to collect and unify data into unified customer profiles that update in real time, not days or weeks.

In this guide, we'll go over the definition, benefits, and use cases of a [unified customer view](#) and how it can help your organization achieve true [personalization at scale](#).

What is a unified customer view?

A unified customer view (UCV) or also referred to as a [single customer view](#) (SCV) allows businesses to see the history of a user's interactions with a brand so your company and you can improve customer journeys and enhance the customer experience.

A UCV usually pulls data from sources such as a customer's mobile activity, retail store visits, and online shopping history, and it knits them into a map that you can use to customize the next steps of your customer's journey.

The benefits of having a unified customer view don't stop with marketing. A unified customer view is also key for data and analytics teams to drive timely actions and get relevant insights throughout the customer journey.

Benefits of a unified customer view.

Now that you understand what a unified customer view is and the impact it has not only for marketing but also for a business overall, let's explore more of its benefits.

- **Better user data.** With a single, holistic view of your customers, you have access to comprehensive, easy-to-access, in-depth data that can provide invaluable insights into behaviors, preferences, and needs. Notably, 75% of CX leaders aggregate data across channels and business units into a single customer profile ([Personalization at Scale, Forrester](#)), which leads to a more comprehensive understanding of their audience. This improved user data can help businesses understand their audience better and make more informed decisions in their marketing strategies.

75%

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- **Seamless, personalized user experiences on every channel.** In today's hybrid world, customers interact with brands across a wide variety of channels. A unified customer view helps businesses provide seamless, personalized experiences across all touchpoints of the customer journey. By understanding the unique journey of each customer, businesses can tailor their interactions to meet individual needs and preferences, significantly improving customer satisfaction and engagement. According to the most recent findings, 71% of CX leaders have real-time accessibility and availability of omnichannel customer data, ensuring up-to-date and relevant customer interactions.

- **Improved audience segments.** A unified customer view also allows for the creation of more precise audience segments. In fact, 74% of CX leaders create segments using predictive models ([Personalization at Scale, Forrester](#)). By consolidating all customer data into one view, businesses can identify patterns and trends that might not be apparent when looking at siloed data. This results in more targeted and effective customer segmentation, leading to more personalized marketing campaigns and, ultimately, better business outcomes.

74% of CX leaders create segments using predictive models.

- **Increased customer trust through data privacy and governance.** Unfortunately, data breaches are increasingly common, which makes maintaining customer trust more paramount. A unified customer view enables better data privacy and governance by storing consent information. When customers provide their data, they also share their consent preferences. With a unified customer view, this consent information is stored, which ensures that businesses respect their customers' privacy wishes at all times and in all interactions.
- **Improved audience activation.** A unified customer view can facilitate improved audience activation. When businesses have a complete understanding of each customer's journey, they can effectively target their audience at the right time, on the right channel, and with the right message.

The unified customer view in action—use cases.

Your organization will enjoy the added benefit of being able to empower your marketing team and free up your IT department from running data queries. By using tools that [let marketers manage customer profiles and harness rich insights](#), marketers will be able to put that data to use quickly and easily in many ways.

Increase customer lifetime value.

A unified customer view is key to increasing customer lifetime value (CLV), a prediction of the net profit attributed to the entire future relationship with a customer. With a more complete view of the customer journey, you can understand and use customer behavior and preferences to optimize customer experience and increase customer retention.

Understand the customer's buying journey.

Consolidating data from every touchpoint into a unified customer view gives you an in-depth understanding of your customer's buying journey.

You can track and analyze every interaction, from the initial point of contact through to the final purchase and beyond. This provides valuable insights into customer behavior and preferences, helping you identify patterns and trends, refine the buying journey, and ultimately drive conversions.

Real Madrid is a great example of a company that understands the customer journey. This Spanish soccer club focuses on using real-time data to allow the club's fans to feel a deep sense of belonging by creating a community.

“ We've built our entire strategy around the idea of real-time data, real-time decision making, and real-time activation across the business. We believe it's really important to understand the behavior at the moment so that we can make the moment more special.

Michael Sutherland

CTO

Real Madrid, CF



Predict customer behavior for personalized experiences.

A unified customer view makes it possible for businesses to personalize customer experiences in a highly effective way. By predicting customer behavior, you can tailor product recommendations, build stronger relationships, and provide personalized and relevant content and offers.

This capability [allows for a more proactive approach](#) to customer engagement, creating experiences that resonate with the customer's unique needs and preferences and foster deeper connections.

Improve customer segmentation and targeting.

With a unified customer view, customer segmentation becomes more precise. By integrating all customer data into a single view, you can identify trends and patterns that may not be apparent when looking at data silos.

This allows for more accurate and detailed segmentation, leading to improved targeting of marketing campaigns. By reaching the right customers with the right messages at the right times, you can drive engagement, conversions, and business growth.

[The Home Depot shifted its focus](#) to gathering all customer data into unified customer profiles. This means that whether a customer is looking for new kitchen appliances or to completely redesign their bathroom, their online behavior gets captured as real-time signals.

“ The Home Depot can now act on insights across channels to provide customers with deals, relevant messaging, and inspiration for their projects.

Ranjeet Bhosale

Vice President of Customer Marketing and Operations
The Home Depot



Move from insights to action.

Finally, a unified customer view helps businesses move from merely gathering data to acting on insights. By consolidating customer data and turning it into actionable insights, businesses can make informed decisions that enhance customer experiences and drive business outcomes.

This shift from insight to action is crucial in today's data-driven business landscape, as it helps businesses stay agile, responsive, and customer-centric.

For example, [EY provides account teams](#) with instant insights into key individuals within the account who are highly engaged and influential. Teams are also able to zoom out to see an aggregate view of interests across the company. This helps client services uncover new opportunities to provide proactive support or new solutions.

“ We had one client that primarily engaged with us for risk and task consulting. But when we started to look at the bigger picture, we saw opportunities for a broader engagement into other issues and service areas.

Kate Mackie
Global Integrated GTM Director
EY GS



Driving personalization at scale.

The most outstanding customer interactions set the benchmark against which all other interactions are measured—which indicates that businesses that embrace personalization are not only growing but doing so at an accelerated rate by prioritizing the creation of engaging human connections. It's important to note that 73% of consumers and an even greater 87% of businesses expect to be delighted both before and after purchase. This highlights the concept of experience-led growth.

In our digital age, delivering connected and personalized experiences is essential. These simple but key principles can help you build a personalization data foundation:

- **Prioritize data within your personalization strategy.** Start by amassing and organizing first-party data from all your sources. Responsible data management is crucial to earning your customers' trust. Remember that trust also hinges on accountability.
- **Establish and maintain real-time customer profiles.** Deepen your understanding of your customers to serve them in a more personalized way. To do this, you can gather omnichannel data and integrate it into a comprehensive customer profile that you can access and activate across all future customer experiences. This practice is followed by 71% of CX leaders, who have real-time accessibility or availability of omnichannel customer data.
- **Develop an omnichannel view of customer experiences.** Track each customer's past interactions to predict their future moves. A thorough exploration of the customer journey across every channel and interaction allows you to craft immersive experiences in the future.

By excelling in these principles, you'll be well-positioned to drive personalization at scale, thereby enhancing customer experiences and fueling your business growth.

Learn more about how Adobe uses data to power personalization at scale by watching [this explanatory video](#).

Learn how Adobe can help you create unified customer views in real time.

It's no secret that tailored, individualized experiences fuel growth and development. Discover new ways to use data to enhance customer experiences and fuel your business growth.

[Learn more](#)

Sources

["Personalization at Scale," Forrester, 2022](#)



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