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Powering Successful Direct-to-Consumer Initiatives

Lessons from the world's most innovative retailers and consumer brands

March 2023

In brief

Working for a top retailer or B2C brand, you recognize that optimized customer data is at the heart of your business success. To deliver a superior experience, you need to establish a customer-centric organizational culture. This transformation needs to be built based on a connected, comprehensive, and compliant customer data foundation. That is why data innovators around the world are counting on Reltio Connected Data Platform —the responsive data platform that provides real-time intelligence to power hyper-personalized and connected experiences, across all channels, every time. In this paper, we share how some of the world's top retailers and B2C brands have benefited by leveraging our platform, and we reveal some of the lessons we've learned in supporting these organizations.

Introduction: the customer experience imperative

In the experience economy, every customer interaction counts. If you want to win in your markets, you need to establish a customer-centric culture, accelerate direct-to-consumer initiatives, and deliver hyper-personalized and connected experiences at every touchpoint. Your customers continue to place an increasing emphasis on experiences they receive, and business implications are massive. Aberdeen: Data Strategy to Maximize Retail and CPG Digital Transformation ROI research shows organizations with connected data are achieving far superior results and KPIs as compared to their competitors.
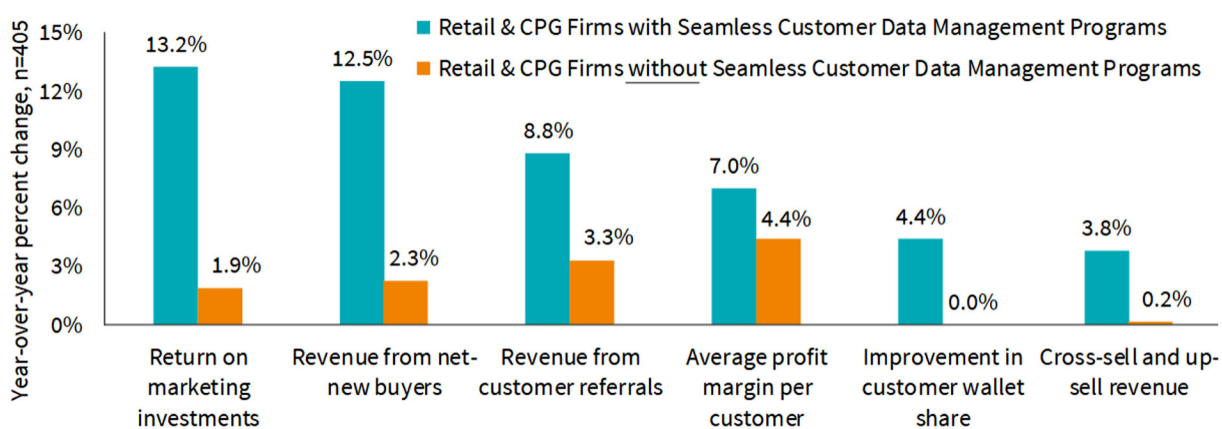
Competitive edge with connected engagement

The challenges B2C organizations are facing

Customer data is at the center of all your business's core objectives. Without rich and connected intelligence, you can't deliver the connected customer experiences that are required to power successful direct-to-consumer initiatives. While enhancing customer intelligence continues to get more critical, it is proving very difficult in many enterprises. Why?

Organizations lack visibility into omnichannel interactions, which impedes their ability to hyper-personalize their consumer engagement across all touchpoints. Over the years, a range of solutions have been implemented to take this data and make it more unified and integrated. While CRM, contact center, and marketing automation applications help, they ultimately fall short in delivering connected consumer visibility.

Data fragmentation and poor data quality are often the biggest obstacles to improving consumer engagement. If you're stuck relying on disconnected and disjointed data from line-of-business and legacy master data management (MDM) systems, your teams struggle to deliver optimized consumer experiences. The subpar data leads directly to missed selling opportunities. That's why your enterprise must employ a connected customer data platform that eliminates the barriers imposed by legacy systems.

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You need a platform that can effectively bring together the data you need—whether it originated in internal applications, third-party data feeds, omnichannel transactions, interactions, or social media. It must help you unlock the value of data relationships among consumers, households, stores, locations, products, devices, and suppliers. And it should also simplify and help manage consumer consent and communication preferences, while adhering to current and emerging regulations.

## How Reltio Connected Data Platform can help

For today's B2C firms, the choice is clear: Deliver superior consumer experiences or risk losing market share. That's why the world's largest retailers and B2C brands are turning to our platform. We deliver connected customer data that powers hyper-personalized and connected experiences—across channels, departments, stores, and brands.

Jon E. Doe
Digital and Mobile

John Doe
Marketing Customer Analytics CDP

Jonathan E. Doe
Data Science and Analytics

360 PROFILE

Jonathan Evan Doe

Addresses
1 New York, 2 London
Phones:
1 Home, 2 Mobile
Emails:
1 Work, 2 Personal
Loyalty:
Titanium

External & Third-Party
D&B, state license ID, LexisNexis

Interactions & Transactions
1/20/2022 $50 lunch at AJ Steakhouse

Relationships
Member of Doe household
Spouse: Ava Doe

Preferences, Insights, & Recommendations
High-end brands, texts, owns blue Tesla

Consent Information
Email, text, no phone calls

Contextual Views
Marketing, sales, support center

Jon Evan Doe
Sales Clienteling

Jonathan E. Doe
Customer Service & Support

Jonathan E. Doe
Regulatory Compliance

Jonathan Evan Doe
Third-Party Data Provider

Connected consumer view: putting all the pieces together

Reltio Connected Data Platform, our first-of-its-kind, cloud-native SaaS master data management (MDM) platform, unifies multisource data into a trusted source of information for your operational and analytical systems. The platform is built on big data architecture that offers the scalability to support the operational demands of the largest enterprises and the most time-critical applications. By leveraging machine learning and connected graph technology, the platform provides you actionable consumer insights—product recommendations, next best actions, lifetime value, profitability, buying and churn propensity, and more—to hyper-personalize your consumer engagement.

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As part of the core platform, our Reltio for B2C velocity pack includes an out-of-the-box, industry-specific data model and configurations so you can speed your time to value. And our API-led connectivity and no-code/low-code integration development environment enable you to use third-party data sets and integrate with a variety of applications.
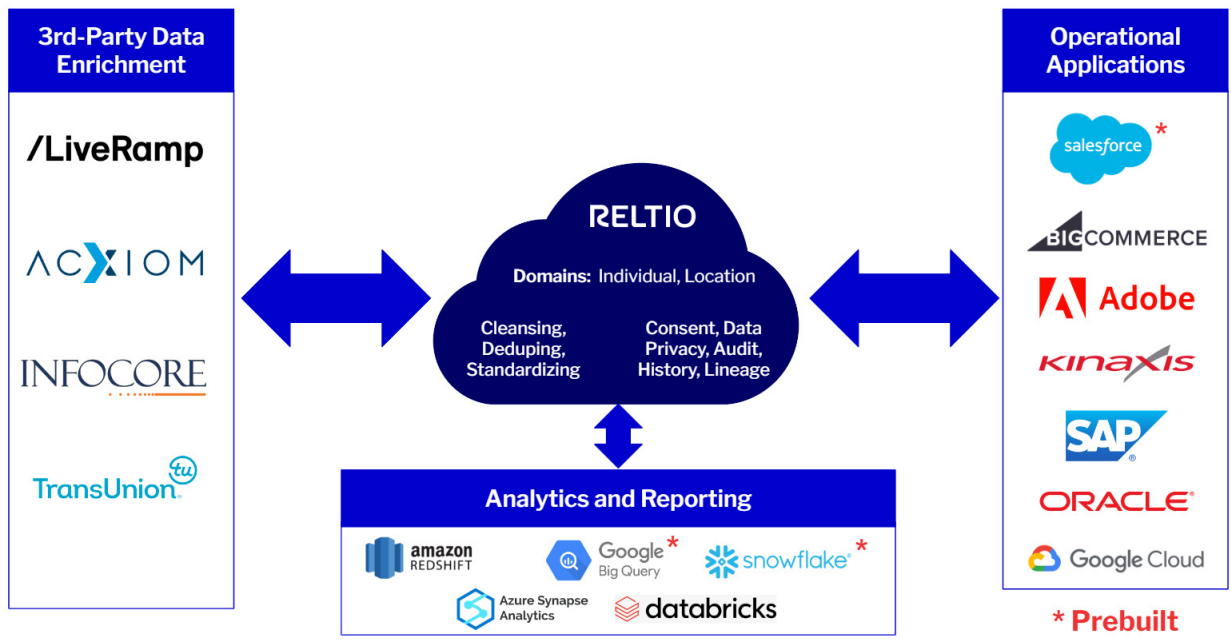
Reference architecture for B2C

The Reltio platform empowers your organization to:

Provide personalized consumer experiences, for example, through customer loyalty programs, e-commerce, and self-service support

Deliver a consistent omnichannel experience, whether customer orders online or pick up at stores

Run hyper-personalized, multichannel marketing campaigns, and uncover upsell and cross-sell opportunities

Increase customer lifetime value through higher customer satisfaction, repeat business, positive reviews, and referrals

Ensure that customer engagement is compliant with regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA)

How our customers benefit from connected customer profiles

Reltio customers are the most innovative Global 2000 enterprises. Every day, our customers trust our solution to manage the data that matters most. With our platform, customers are establishing customer-centric operations, expediting direct-to-consumer initiatives, and delivering optimized, hyper-personalized experiences across channels. In the following sections, we feature case studies that illustrate how B2C and retail customers benefit by employing Reltio Connected Data Platform.

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Case study #1: Leading pet specialty retailer competes with online retailers on experience

Vision

- Transforming from a traditional retailer into a customer-centric service company by focusing on personalized experiences for pet parents and service providers, including groomers, coaches, and vets
- Competing against the "Amazon effect" by leveraging data to offer pet parents a consistent experience, unique services, and an efficient omnichannel journey
- Unlocking the value of data relationships among pets, pet parents, and service providers
- Increasing annual pet-parent spend, retention, and cross-sell service opportunities

Without Reltio

- The company struggled with fragmented data across multiple systems
- The retailer had multiple repetitive data entry points from its customers, resulting in disconnected customer experiences across departments and services
- Without a unified view of pet parents, they could not match their competition in offering timely content or relevant product recommendations

With Reltio

- Created a single view of more than 50,000 pets and pet parents across all their brands, joint ventures, and internal systems
- Established a single repository of trusted pet-parent profiles that are enriched with all interactions, whether customers are calling, accessing the web site, using a mobile app, or visiting the store
- Gained visibility into pet parents' preferred service providers, enabling hyper-personalized services and more targeted and effective sales

"We looked for a data management solution that could not only help us model relationships among pet parents, caregivers, pets, employees, and stores, but do it at big data scale and in real-time. With the Reltio platform, our teams can deliver hyper-personalized experiences that boost revenues and loyalty."

—Technical Delivery Manager, Consumer Knowledge, at a leading pet specialty retailer

50M
Pet and pet-parent profiles

1500+
Stores

12
Systems integrated

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Case study #2: Driving digital transformation for a leading fast-food chain

Vision

- Reinventing their global customer loyalty program to boost brand affinity, repeat purchases, customer retention, and profitability across their more than 40,000 globally distributed franchises
- Delivering an enhanced, more personalized consumer experience across all engagement channels, including in franchise, on the web, in mobile apps
- Maximizing the security of customers' personal information and more efficiently complying with regulations and customers' consent preferences
- Making location-based offers

Without Reltio

- The company had to support two different systems for managing customer data, which led to inefficiency and disjointed experiences, stifling the team's ability to enhance services
- The business lacked the ability to offer incentives to customers to promote regular visits and purchases
- The business had no single, reliable view of their customers across multiple applications and channels

With Reltio

- Established a trusted, continuously updated data foundation that helps feed real-time information to in-store, mobile, and online channels
- Integrated 30,000 profiles from two separate data systems and fed data to downstream systems to support more than 50,000 transactions per day
- Enhanced security of customers' personal data and streamlined compliance with regional and international privacy regulations and with consumers' communication requests and preferences

"Reltio is at the center of our ability to improve customer experiences. It plays an integral role in our critical customer engagement processes, everything from new account signups to mobile app downloads, and it delivers the consistent, scalable performance we need, every time."

—Chief Information Officer at a leading fast-food chain

30M
Consolidated customer profiles

40K+
Stores

110+
Countries

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Case study #3: Luxury retailer scales personalization

Vision

- Expanding the capabilities of in-store and online channels to deliver highly personalized and engaging experiences that had only been possible to deliver to select customers
- Harnessing enhanced customer visibility to power more sustainable growth
- Offering premium, targeted services that help increase customer lifetime value

Without Reltio

- The company could only support basic marketing—teams had to put in a significant amount of effort for any relevant campaigns
- Teams lacked visibility into a big swath of customers who walked in or visited the web site
- Sales associates in one location could not see if a current customer visited another store location
- Teams lacked visibility into relationships between sales associates and customers

With Reltio

- The company equipped sales associates with real-time access to rich customer profiles that included data from all stores and brands, all transactions, all online interactions, and more
- They delivered views of customer profiles that were tailored to specific roles and teams, including marketing, digital, point of sale, and more
- A cloud-native solution delivered fast time to value and the agility to adapt to evolving requirements
- Streamlined compliance with consent management and customer communication preferences, and supported other compliance needs

> "The Reltio platform delivers the connected customer data that is at the heart of our strategic customer initiatives. With the platform, we can deliver connected and hyper-personalized customer experiences across our brands and channels."
>
> —Vice President of Marketing Technology, luxury brand retailer

5000
sales associates supported with real-time intelligence

100s
of systems integrated

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Why to choose Reltio Connected Data Platform

Business outcomes powered by connected data

- Connected customer experiences and increased customer loyalty
- Scalability and agility to support new use cases and business models to adapt to changing digital landscape
- Platform flexibility supporting global and local business requirements concurrently

Support for real-time operations at scale

- Continuously collect and curate any volume of data at business speed and scale
- Scale on demand to support business growth and demand spikes without downtime

Cloud-native, multidomain SaaS MDM for cost reduction

- Built for the cloud—not a retrofit—with modern components including ML
- Zero-effort HA/DR, zero downtime, zero-effort upgrades

Security using zero trust approach

- Zero-effort security and access permissions, 24/7 monitoring and threat protection, and data encryption
- Extensive security certifications and additional layer of security options including HITRUST, SOC1, SOC2

Fast time to value

- Cloud-native SaaS platform ready on day 1; teams can get enterprise-scale operations up in <4 weeks
- Reltio for B2C velocity pack with out-of-the-box data model and configurations

Management of complex relationships and hierarchies with graph technology

- Discover many-to-many relationships across people, products, locations, stores, and households
- Reduce marketing costs by identifying and targeting the right person or recommending the right product

Agility and flexibility

- Real-time, configurable data model, enabling fast adaptation to changing accounts and business needs
- Flexibility to support global and local business requirements concurrently

Operational and analytical convergence

- Shared data model for both operational and analytical use cases
- Provision highly curated data in real time to impact experience at the point of engagement and improve AI/ML ROI

Compelling consumer-grade user experience

- Intuitive user interface promotes faster adoption and higher productivity for all roles, including business users, data stewards, and administrators
- High-quality, contextual data that powers faster, smarter decision-making and optimized operations

Simplified compliance

- Granular, attribute-level audit, history, and lineage of all data usage and changes
- Management of consent and communication preferences across campaigns, brands, channels, and locations for data privacy compliance

See how Reltio Connected Data Platform can help you power your direct-to-consumer initiatives

Watch the demo