

RELTIO

WHITE PAPER

Maximizing B2B sales and marketing efficacy

Lessons from the world's most
innovative B2B enterprises

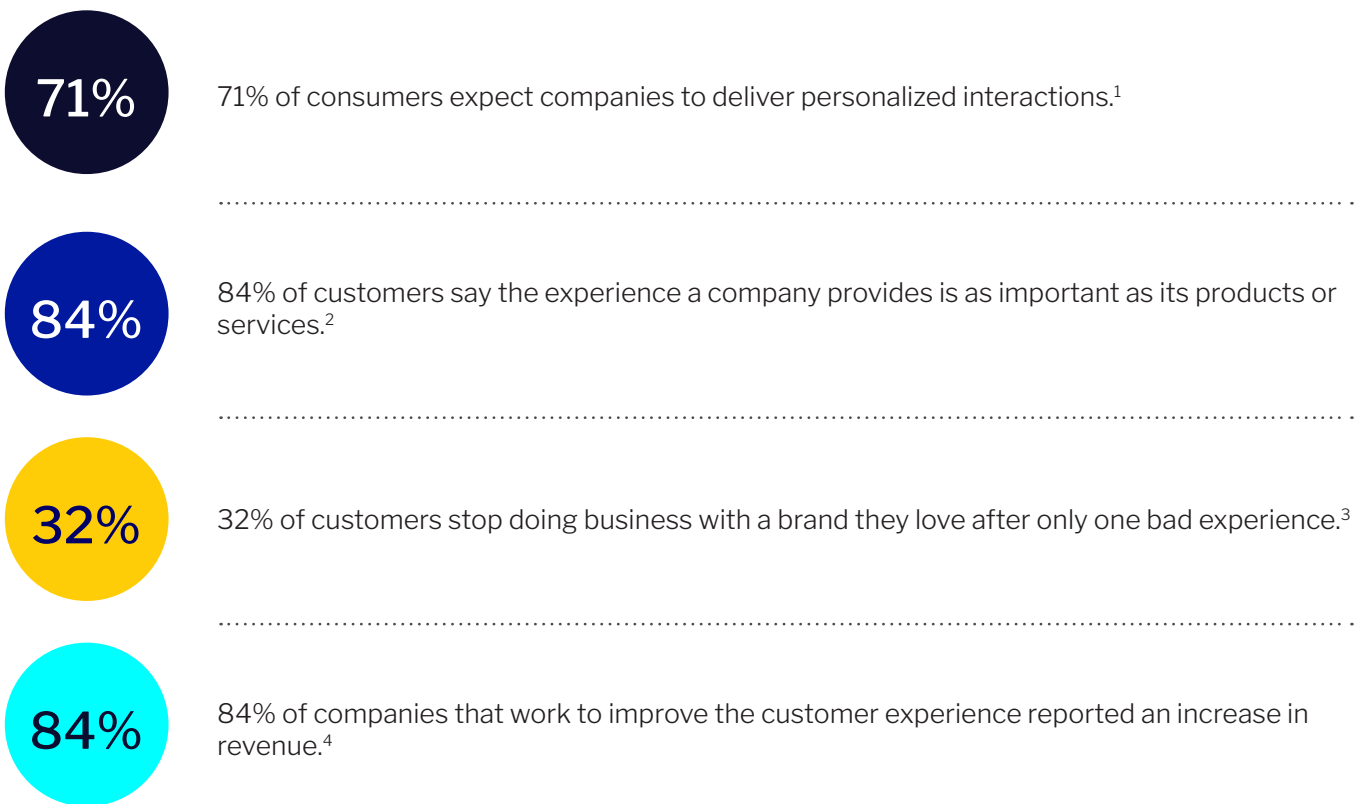


In brief

In your competitive markets, you need to deliver a superior customer experience and maximize the lifetime value of your accounts. To do so, you need to provide your customers with the right information, offers, and products at the right time. Around the world, data innovators count on Reltio Connected Data Platform to deliver real-time insights that power hyper-personalized and connected experiences, across all their interaction channels, every time. In this paper, we share how some of the world's top B2B enterprises have benefited by leveraging our platform and 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 plan to win in your markets, you need to deliver hyper-personalized and connected experiences at every touchpoint, while respecting customers' privacy, consent, and communication preferences. Your customers continue to place an increasing emphasis on the experiences they receive, and the business implications are massive. Consider just a few statistics:



¹ Source: [McKinsey & Company](#), "The value of getting personalization right—or wrong—is multiplying," November 12, 2021

² Source: [Salesforce](#), [State of the Connected Customer: Third Edition](#), June 12, 2019

³ Source: [PwC](#), "Experience is everything: Here's how to get it right," 2018

⁴ Source: [Forrester Analytics Business Technographics Global Data & Analytics Survey](#), 2019

The challenges B2B organizations are facing

While the customer experience continues to grow more critical, it also keeps getting harder to manage and optimize. A Forrester report uncovered several key challenges business leaders are encountering:

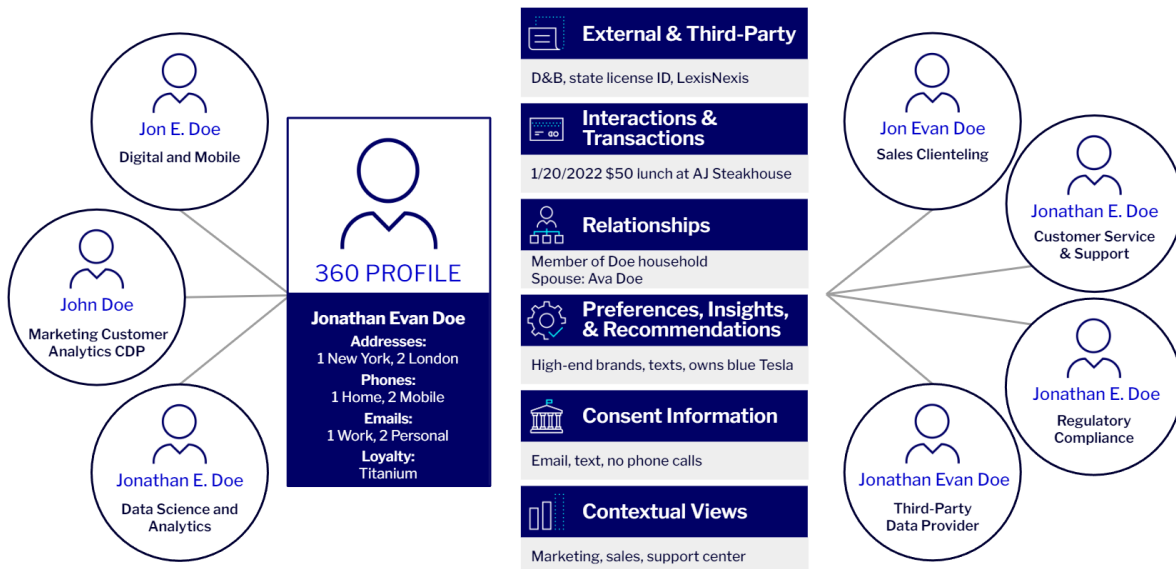


Source: Forrester Analytics Business Technographics Global Data & Analytics Survey, 2019

Why are these efforts proving so difficult? Fragmented data and poor data quality are often the biggest obstacles in improving customer 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 customer experiences.

Teams lack visibility into omnichannel interactions, which impedes their ability to optimize each engagement and deliver personalized, account-based campaigns. Because they're relying on incomplete or inaccurate data, your account teams struggle to model and manage account hierarchies. This subpar data leads directly to missed selling opportunities.

That's why it's vital that your enterprise employ a connected customer data platform that eliminates the barriers imposed by legacy systems. You need a platform that can effectively manage the data you need, whether it originated in internal applications, third-party data feeds, omnichannel transactions, interactions, or social media.



Connected customer experiences

How Reltio Connected Data Platform can help

Around the world, leading B2B enterprises rely on us because we deliver the connected customer data that powers hyper-personalized and connected experiences—across all touch points. Reltio Connected Data Platform is the first battle-tested, cloud-native SaaS platform built on a big data architecture that features graph technology and machine learning. Our platform enables you to aggregate, refine, reconcile and relate data from hundreds of sources. With Reltio Connected Data Platform, you can create a trusted, detailed and integrated view of your customers, so your teams can:



Leverage actionable insights that enable teams to more effectively target, engage, and cultivate relationships within accounts



Understand an account's organizational structure to identify the best point of contact and sales approach



Enable targeted insights and intelligent, automated recommendations that can scale the productivity of even your most novice sales reps

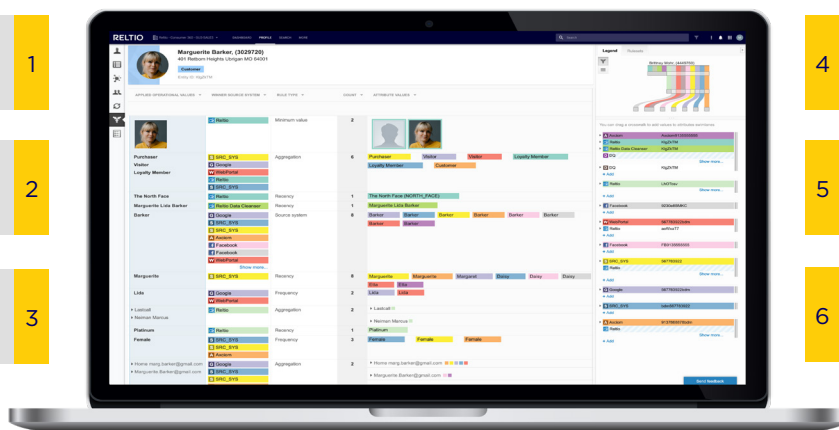


Identify and capitalize on upsell and cross-sell opportunities

Single View of Customer 1

Onboard All Data, Including Transactions 2

Unlock the Value of Relationships 3



Actionable Customer Insights 4

Simplify Compliance 5

Contextual Customer 360 Profiles 6

6 steps to simplify the complexity of customer data

How our customers benefit from connected customer profiles

Our customers are the most innovative Global 2000 enterprises. Every day, our customers trust our solution to manage the data that matters most. Our customers include eight of the top 10 global pharmaceutical companies, two of the top healthcare services companies, two of the top hospitality brands, and three global luxury goods companies. In the following sections, we feature case studies that illustrate how customers benefit by employing Reltio Connected Data Platform.

Case study #1: Leading PC & printer manufacturer enhances services and personalization

To keep their company at the forefront of their quickly evolving market and succeed in the experience economy, the management team realized that providing a personalized experience to each customer was a critical imperative. The management team turned to Reltio so they could create a single, global view of all accounts. With Reltio Connected Data Platform, the team was able to consolidate data from internal, external, and third-party sources, including Dun & Bradstreet.

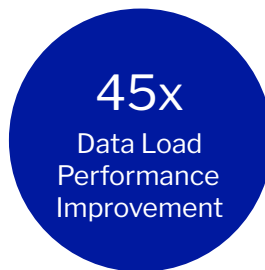
By connecting transactions with rich customer profiles, the Reltio platform gives teams visibility into the complex relationships and hierarchies among their business units, customers, resellers, and partners. By leveraging the platform's cloud-native architecture and industry best practices, the team was able to transform its data management capabilities, while minimizing business disruption.



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“By 2024, one-half of organizations will see the need for a dedicated tool for integrating their siloed stores of customer data, spurring discussions between IT and CX professionals on data management strategies.”

—Keith Dawson,
VP & Research Director



Before Reltio	After Reltio
<ul style="list-style-type: none"> • No single view of B2B customers, resellers, and partners • Missed opportunities to upsell and cross-sell • Struggling to adapt to changing business models 	<ul style="list-style-type: none"> • Improved operational efficiency by streamlining management of complex relationships and hierarchies • Increased sales through the delivery of more personalized experiences • Gained improved business agility through faster and easier scaling and adaptability of operations

Our takeaway: To deliver personalized customer experiences at this scale, teams from across the organization need to be able to gain a unified, global view of all accounts, ensuring that data remains clean, consolidated, and compliant.

Case study #2: Leading health services company customizes service offerings for diverse customers

One of the largest companies in the healthcare sector was striving to meet the demands of an ever-changing business environment. Their primary challenge was managing distributed customer data, especially with their rigid, legacy MDM system. As a result, they could not offer products and services that were effectively tailored to the needs of their diverse B2B customer accounts.

Reltio Connected Data Platform provided a truly differentiated alternative. The platform can scale to accommodate an unlimited number of data sources. The team quickly gained confidence in the platform, and within just 12 weeks was able to integrate more than 70 systems and four million records.

With a connected view of their diverse B2B accounts, teams throughout the company have a deeper understanding of their customers' needs. Armed with these insights, they are able to offer customized products and services that meet their diverse customer requirements.

“To deliver optimized products, services and experiences to our customers, it was vital to gain a unified view of our complex accounts. With Reltio, we can gain a better understanding of our customers and their needs, so we can fine tune every interaction.”

—VP, Growth Technologies & Proposals



Before Reltio	After Reltio
<ul style="list-style-type: none"> • No single view of customers • Missed opportunities for offering the right products to diverse customers • Expensive and rigid legacy MDM system not able to handle data challenges of multiple acquisitions 	<ul style="list-style-type: none"> • Improved customer satisfaction by tailoring interactions based on connected customer views • Increased revenues by gaining better insights into opportunities to provide customized products and services • Enhanced business agility by harnessing a cloud-based architecture than can easily scale • Improved customer service by delivering 57% faster response time

Our takeaway: Rigid data management hurts many levels of the organization. By establishing unified, 360 connected visibility, teams can boost customer service, improve customer satisfaction, and increase revenues.

Case study #3: After M&A, global diversified hospitality company establishes accurate customer alignment

Due to a series of strategic acquisitions, a global hospitality company was contending with corporate customer data that was fragmented across multiple sources and systems. Without a single, integrated data foundation, they could not reliably align corporate accounts to a legal hierarchy and produce global roll-ups of revenue. As a result of inefficient, manual processes, the team was finding it difficult to understand the business value of corporate accounts and offer each account the right packages and discounts.

Reltio Connected Data Platform delivered a complete, compliant view of more than 3.2 million of their business customers across all merged companies, with all corporate accounts precisely linked to a global legal entity and hierarchy.

With our platform, the team fully automated their end-to-end customer data management and the process of assigning revenue to accounts. Today, the team can link reservations to their sales hierarchy to generate more accurate revenue reporting.

“The scalable Reltio platform efficiently accommodated our huge data volumes, and its fast implementation allowed us to meet our ambitious end-of-year targets.”

—VP, Omnichannel CRM & Data Strategy



Before Reltio	After Reltio
<ul style="list-style-type: none"> • Customer data scattered across multiple sources • Data management issues after mergers with other hotel chains • Failure to process global roll-ups • Highly manual process to assign revenue to accounts 	<ul style="list-style-type: none"> • Enhanced sales and marketing efficacy by establishing a master list of business customers across all merged hotel chains • Increased revenues by building contextual account hierarchies that enabled more intelligent sales execution • Improved sales forecasting and reporting by leveraging scalable data matching and linking reservations to accounts

Our takeaway: As mergers and acquisitions become more common, the challenge of understanding the business value of all B2B customers grows increasingly difficult. To provide the best products and services, it is critical to establish unified views of all accounts and gain a rich understanding of each accounts’ complex organizational hierarchy.

Why to choose Reltio Connected Data Platform

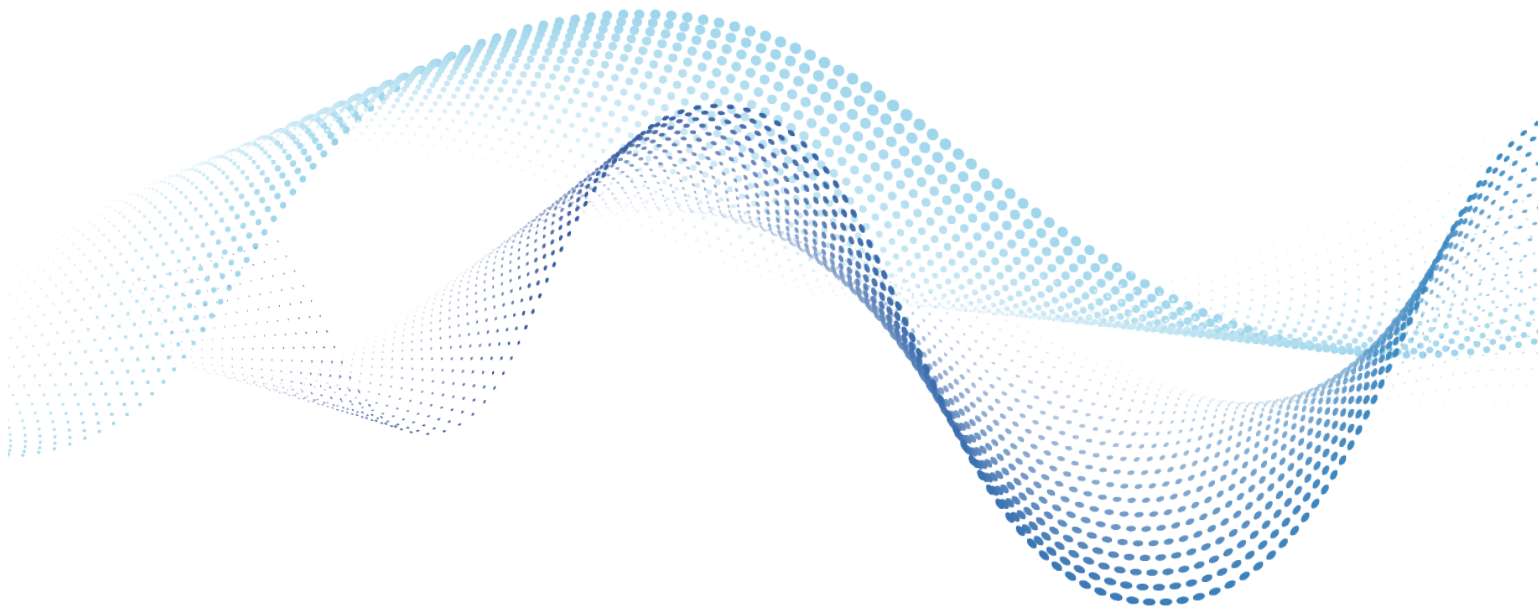
1	<p>Reliability at big data scale</p> <ul style="list-style-type: none">• Continuously organize any volume of data at business speed and scale• Scale on demand to support business growth and demand spikes
2	<p>Cloud-native data platform</p> <ul style="list-style-type: none">• Built for the cloud, not retrofitted from an on-premises system• Higher rate of innovation and new technology adoption
3	<p>Managing complex relationships & hierarchies using Connected Graph</p> <ul style="list-style-type: none">• Model and manage many-to-many relationships across contacts, accounts, products, and locations• Customize hierarchies based on user role and business function
4	<p>Operational & analytical convergence</p> <ul style="list-style-type: none">• Shared data model for both operational and analytical use cases• Correlate master data with transactional data and interactions
5	<p>Granular, closed-loop segmentation</p> <ul style="list-style-type: none">• Segment customer accounts based on data quality, revenue, engagement, and risk• Correlate account plans, tactics, and recommendations for demonstrable ROI and continuous improvement
6	<p>Agility & flexibility</p> <ul style="list-style-type: none">• Real-time, configurable data model, enabling fast adaptation to changing accounts and business needs• Flexibility to support global and local business requirements concurrently
7	<p>Fast time to value</p> <ul style="list-style-type: none">• Entire SaaS environment is ready on day one, and teams can get enterprise-scale operations up and running in less than four weeks• Pre-built data models, templates, workflows, and applications
8	<p>Compelling business user experience</p> <ul style="list-style-type: none">• Google-like search and visualization of all data objects and their relationships from multiple perspectives• Intuitive, LinkedIn-like user interface accessible via mobile and web
9	<p>Simplified compliance</p> <ul style="list-style-type: none">• Granular, attribute-level audit, history, and lineage of all data usage and changes• Compliant with HITRUST, SOC1, SOC2, KYC, CCPA, and GDPR

“Reltio is a good fit for companies looking for a comprehensive, cloud-based MDM solution across multiple domains.”

—The Forrester Wave™: Master Data Management, Q4 2021

“Three years ago we wrote that Reltio was several steps ahead of the market. Based on our latest assessment of their execution metrics related to product, technical and business innovation, and the growing adoption by some of the largest enterprises in the world, the gap may have even widened.”

—Bloor Report



WHY RELTIO

We believe data should fuel your success, not hold you back. Our first-of-its-kind, master data management SaaS offering unifies and cleanses multisource, complex core data into a single source of trusted information—in real time. Agile to fit any company’s needs and flexes at will. Reltio Connected Data Platform helps you act on your data with confidence. And maximize your impact every day.

To learn more, visit www.reltio.com

US +1 (855) 360-3282
UK +44 (800) 368-7643

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