# The Ultimate B2C Guide To Data Orchestration

How It Works & Why It Can Help You Do
More With Your Data

Lineate

# CONTENTS

# INTRODUCTION
## Data Orchestration & The Modern Digital Landscape

The modern digital landscape is a complicated one. Whether it's the issue of how to manage massive amounts of data, an increased focus on consumer privacy, or the general shift in customer preferences towards personalization—Keeping up with the evolution of the digital space is a challenge for small businesses and Fortune 1000 companies alike.

With about 2.5 exabytes of data produced per person each day and the expected annual world data total to rise to 44 zettabytes (44 trillion gigabytes) by 2020,[1,2] an urgent question is emerging: How can companies leverage data effectively to drive more personalized marketing experiences? According to Forrester, less than 0.5 percent of all data is ever analyzed and used, and yet, "just a 10 percent increase in data accessibility can result in more than $65 million additional net income for a typical Fortune 1000 company."[3]

**"Just a 10 percent increase in data accessibility can result in more than $65 million additional net income for a typical Fortune 1000 company."**

$65 M

That's a lot of value attached to the organization and orchestration of clean data.

Additionally, Forrester found that while 78 percent of marketers believe that data-driven marketing is a strategic part of their organization, 70 percent also feel they have inconsistent data. So, while companies have the desire to be data-driven, the reality is that the majority of them are falling behind in this regard. This is a major issue if businesses want to succeed long-term.

Consumers are seeking brands that engage with them uniquely, understand their personal preferences, and protect their data. According to Salesforce, consumers are 2.1x more likely to view personalized offers as important versus unimportant, and over half of consumers actively want to buy from brands that introduce new products and services based on customer needs or new technology.[4]
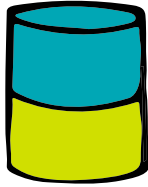
**Consumers are 2.1X more likely to view personalized offers as important**
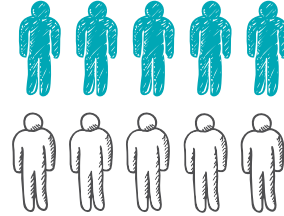
**Over 50% of consumers want to buy from brands that introduce products using new technology**

As customer touchpoints continue to increase and the buyer's journey becomes more complex, it's not enough for brands to simply be on these channels or devices.

## What use is a multichannel campaign if the data gathered from it doesn't continuously inform your campaign's relevance and customer understanding?

For marketers to develop more personalized cross-channel campaigns, they need a better way to target their ideal audiences. And targeting isn't always a given. After all, you need a reliable method for tracking and understanding your audience to map activations to their unique customer journeys. This becomes harder with the use of third parties that don't give you any real insight into who customers are or why they're in certain segments.

In order for companies to create meaningful connections with consumers, they need one place to unify, organize, and launch their data to truly understand the nuances of their customer, what messaging is and isn't working, and how they can create more relevant marketing experiences that improve ROI. **That's why data orchestration is so important.**

But what is it?

Simply put, the idea of data orchestration is the ability for brands to organize and leverage their own data to better connect with customers and make better business decisions.

For the past decade, most businesses have been collecting and storing massive amounts of data while trying to activate and connect omnichannel experiences. As data continues to grow within an organization, it becomes disparate across teams, departments, technologies, and business partners. These silos make it difficult to leverage data effectively to create relevant experiences for diverse audience segments. Just think about it: Companies don't have one customer for email marketing and another customer for social or search campaigns, but more likely the same person researching and purchasing across a variety of channels.

Lineate

As brands increasingly use third-party platforms to run their marketing campaigns (relying on anonymous third-party segments as a result), making sense of your first-party data is more important than ever when it comes to competitive differentiation. After all, if everyone's using the same segments to target the same people without background on who they really are—it's safe to say that no one's campaigns are giving consumers truly personalized experiences.

**This is where a data orchestration platform comes in. A platform that orchestrates your data allows you to:**
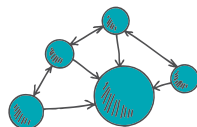
1. Integrate your company's data sources

2. Uncover anonymous third-party data by linking it to your first-party data for more holistic customer insights

3. Activate those insights to create targeted campaigns across every channel

4. Enrich audience segments automatically by feeding data collected from campaigns back into the platform

5. Execute the first four steps in one seamless interface

A note on the importance of the second bullet: While you may currently have a customer's email and nothing else, data orchestration uses things like cookie and audience ID matching  to attach that email anywhere else it exists… like a third-party demographic segment. The result? You now have someone's email, as well as their age, gender, and location all in one organized audience profile to better inform your campaigns.

Behemoth organizations like Facebook, Google, Amazon, and Netflix are already in an arms race of their own, striving to intelligently leverage their first-party data to provide the personalized experiences their customers crave. But what about the rest of us?

According to a recent Adweek article, which included research from Accenture, 71 percent of global business leaders say that the most important factor in customer experience is ensuring their staff has access to the right customer data. The article then highlights that, globally, 88 percent of marketers report not using data to its full potential, and 82 percent of marketers plan to increase their use of first-party data this year.[5] While these stats paint a picture for the growing imperative for clean customer data there is still the challenge of unifying data inputs into a single customer view to activate across your tech stack.

In order for companies to keep up with the tech giants and evolving customer data habits, they must be prepared to orchestrate their own data. By doing this, companies can begin to overcome the chal-

lenges of data fragmentation and disjointed technology integrations, which if left unresolved, leads to poor customer experiences and bad business decisions.

Read on to learn how your business can leverage data orchestration to overcome internal data silos, connect disparate consumer touchpoints, and leverage data to create more personalized customer experiences that drive results.

# UNDERSTANDING WHAT YOU NEED:

## The Difference Between DMP, CDP, and Data Orchestration

With an increase in relevant marketing channels, it's imperative that companies home in on their own data or risk missing opportunities to create meaningful brand experiences that resonate with customers. And don't just take our word for it: 59 percent of companies that use comprehensive data platforms agree that it gives them a competitive advantage in their industry.[6]

**59% of companies agree that comprehensive data platforms give them a competitive advantage**
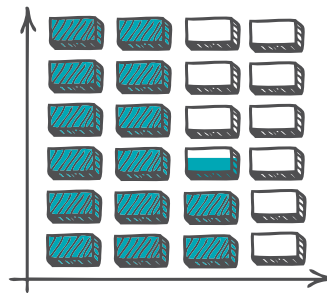
But, before we dive into how different platforms can help make sense of your data, let's cover the basics of how data is categorized and the three major types of data organization tools: DMPs, CDPs, and data orchestration platforms.

### 3 Main Data Types

**First-party data:** You are the first party and this data belongs to you. It is the information your company has collected about its audience from sources like CRM (customer relationship management) systems including email addresses, site visits and past purchases. Many would call this the best kind of data because you collect it directly from the source and it is a key component to activities like building customer relationships, site retargeting, brand loyalty, and more.

**Second-party data**: is a partner company with whom you have a relationship and this data is their first-party data. Unlike first-party data, which is yours; and third-party data, which is commoditized; second-party data belongs to another brand shared with you. Often, the best way to gain access to second-party data is through leveraging partnerships where companies agree to share their first-party data with one another. This kind of data can also play a role in extending and targeting one's audience. We'd call this the second-best kind of data because it includes information directly from the consumer.

Example: Say there's a company who makes movies. One way they could leverage second-party data is by creating a partnership with a ticket website, like Fandango, to better understand user interactions with ticket sales in a native environment. By receiving access to analytics from Fandango's website to track interactions, the movie company is now using second-party data alongside its first-party data to understand the effectiveness of their trailers alongside ticket sales. The data the movie company is leveraging for insight, is Fandango's first-party data, which they've received directly from customers.

**Third-party data:** This type of data is collected by an entity that isn't you and doesn't have a direct relationship with consumers from platforms like Facebook and Google. Most often, it's aggregated by large companies that are pulling data from outside sources. This data is most often used to create consumer segments for ad targeting that we use during our campaigns (i.e. A facebook segment including women age 50-65 in digital marketing who like IBM). This is the broadest type of data out there due to its wide accessibility.

### DMP vs. CDP vs. Data Orchestration: What You Need To Know

First, DMP stands for Data Management Platform. As Martech Today defines it, a DMP is software that houses audience and campaign data from a variety of information sources with an emphasis on third-party data, specifically.[7] While DMPs can house and manage any form of information, for marketers they are most often used to manage cookie IDs and generate audience segments for ad targeting.

While some DMPs do promise the integration of first-party data, it's usually anonymized as DMPs don't typically store any personally identifiable information (PII). According to Tech Target, personally identifiable information is, "Any information that can be used to distinguish one person from another." [8] Types of PII include someone's full name, driver's license number, biometric information or email address. Given this, DMPs can be useful for equalizing the playing field with competitors, but without the integration of other kinds of data, they don't help users differentiate themselves in the marketplace.

## Recap

One of the biggest differences between a DMP and a CDP is the DMP's reliance on third-party data to garner insights as well as its limitations for housing personally identifiable information.

With the advent of consumer data regulations like GDPR and Facebook's decision to remove third-party targeting, scrutiny is mounting for the industry's reliance on this kind of data.[9] Additionally, most third-party data is created on other platforms outside one's business and then aggregated to be sold by vendors, making this data darker—meaning that there isn't always a clear answer as to where the data came from or who it belongs to because of how it's aggregated and sold. Due to how this information is acquired, as well as the question of third-party data's accuracy,[10] brands that rely heavily on this type of data don't often get the targeted results they're seeking.

That's where CDPs come in. CDPs create a comprehensive view of customers by capturing data across varied systems (first- and third-party data + personal identifiers), linking information related to the same customer, and storing this data to track their behavior over time. The key differentiator of a CDP is that it includes personal identifiers that help marketers create more targeted messaging and track results on an individual level. [11]

**And while both DMPs and CDPs can help organize your data for better campaigns, there is substantial inconsistency from platform to platform industrywide.** Some CDPs consider audience segmentation "advanced." Some don't include first-party data at all. So, why not utilize a data platform that consistently manages first-party data, third-party data, audience segmentation, and much more?

That's where a data orchestration platform comes into play. A data orchestration platform combines the best features of both DMPs and CDPs—and then some. With an emphasis on your company's own data (+ more PII), this type of platform automatically combines disparate audience touchpoints and data from a multitude of platforms to solve when, where, and how consumers are interacting with your brand—also known as identity resolution. Then, data orchestration allows you to launch cross-channel campaigns in-platform, feeding the new audience data you collect directly back into the system for continually optimized performance.

While a data orchestration platform is the type of tool marketers everywhere are searching for, few understand just how much it can help. According to Adweek BrandShare, respondents revealed that three of the top obstacles to data-driven marketing success are reliable third party data sources (38%), accuracy of audience data (38%), and integration of marketing platforms (37%)—all of which data orchestration addresses.[12]

## 3 Main Obstacles To Data-Driven Marketing

38%   Say reliable third-party data sources
38%   Say audience data accuracy
37%   Say marketing platform intergration

38%   38%   37%
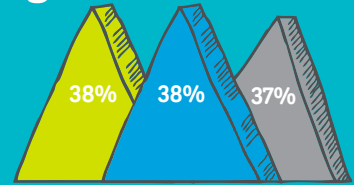
All that is to say: Data orchestration allows not just for the mixing and merging of first-party data to improve customer understanding, but also creates a centralized place to leverage all data sources to plan, activate, monitor campaigns, seamlessly. More specifically, by centralizing all of your data and platforms in one place, your team will have a clearer understanding of how marketing activities connect.

To understand the type of audience information you'll see in each platform, we've created a handy chart that illustrate the differences.

### VIEW WITHIN DMP

Lacking the ability to layer data and match audience IDs, DMPs often aren't enough to understand customers on an individual level. With a growing emphasis on brands providing more connected customer experiences, the below view doesn't lend itself to that goal.

- Name: Anonymous User
- Age: 30-34
- Status: Married, 3-8 children
- Location: Chicago, IL
- Interests: Animals, Cars, Food

### VIEW WITHIN CDP

A CDP is able to store first-party data (including PII) in a unified database to be understood and applied to customer-specific activities. While this makes it easier for companies to identify their customer, query faster, and do in-depth analysis to create more relevant marketing strategies, a CDP can't help activate that data in your campaigns.

- Name: John Doe
- Age: 32
- Status: Single
- Location: San Diego, CA

- Likes: Running, Coffee, Kayaking
- Ad Clicked: 7/1/18
- Last Website Visit:  8/1/18
- Browser Name: Safari
- Referred from: LinkedIn.com

## VIEW WITHIN A DATA ORCHESTRATION PLATFORM

A data orchestration platform can store first-party data as well as incorporate other types of data from your tech stack, allowing for identity resolution to utilize in audience segments. By matching and integrating all data sources in one place, marketers can more easily use it to activate increasingly personalized campaigns across every channel, with new insights continuously fed back into the centralized system for optimized performance.

- Name: Jane Doe
- Age: 25
- Phone Number: 888-888-1234
- Status: Married
- Location: Anchorage, AK
- Social Likes: Pop music, Mexican food, and Beyonce
- Conversion Path
- Ad Clicked: 7/1/18, 7:35 p.m.
- Email Opened: 7/23/18, 1:00 p.m.

- Last Website Visit: 8/1/18, 9:30 a.m.
- Purchase Made: 8/3/18, 5:35 p.m.
- Coupon Used: Yes - 50% off
- Loyalty Reward: Yes - 1000 pts.
- Browser Name: Firefox
- Device Language: English - British
- Operating System: OSX, iOS 11.1
- Referred from: Facebook.com
- Audience Segments: Social Media Managers, Millennials, East Coast United States
- Campaigns: Summer Fun (July) campaign, 2018 Holiday campaign

Additionally, while the more obvious use of a data orchestration platform may be to unify data to understand customers better, or activate more connected cross-channel campaigns, one way that these platforms can also be useful is for taking control of your own data as General Data Protection Regulation, or GDPR as we've all come to know it, takes a firmer hold throughout the industry.

# A MINI GUIDE TO GDPR & HOW DATA ORCHESTRATION CAN HELP

A quick refresher: GDPR is a law that was enacted by the EU, which ensures consumers have more control over their own data by giving them the power to view, limit, transfer, or delete it at any time. With similar data laws rolling out in the US by 2020,[13] it's imperative US brands start planning sooner rather than later.
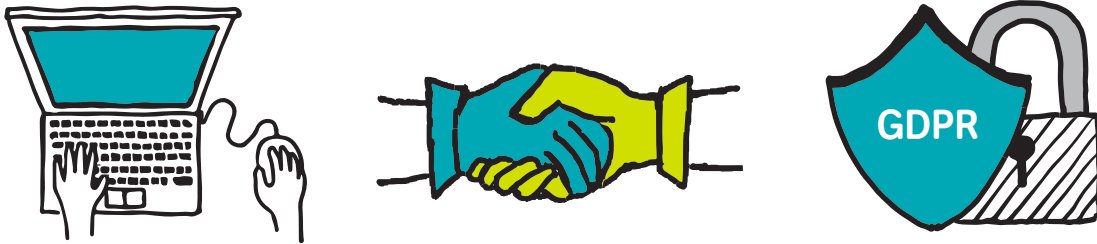


This regulation has put the onus on marketing teams to be more transparent in their communications by:

- Explaining to consumers why and how data will be used
- Planning how consumer data will be collected, organized, and stored
- And, testing the aforementioned approaches to better engage consumers and increase positive consent responses

While there will always be a learning curve with any change, the truth is this: Consumer preferences are ever-evolving and this constant evolution gives marketers an opportunity to provide customers with the value, trust, and relevant experiences they're seeking.

So, the best way for your company to reach customers with well-received marketing is to be proactive. The global data shift is on its way and companies mustn't ignore it or they run the risk of being unprepared for consumer data requests and subjected to hefty fines. Through transparency and useful communication, brands now have the opportunity to gain a competitive advantage by creating more valuable customer interactions.

Research from Salesforce found that 76 percent of consumers expect companies to understand their needs and expectations.[14] Additionally, personalization is the new rule of thumb with 70 percent of consumers stating that connected processes—such as seamless handoffs or contextualized engagement, based on earlier interactions—are very important to winning their business. Customers also expect data protection and trust with 57 percent of them expressing they were, "uncomfortable with how companies use their personal or business information." This makes it imperative for companies to see general data security as a major factor in providing the best experiences for their customers.

**70% of consumers state that connected processes—such as engagement based on earlier interactions—are very important to winning their business.**



**70%**

Moreover, according to an eMarketer report,[15] 59% surveyed cite their top GDPR challenge as knowing wheter or not they've taken sufficient actions to comply. 58% say that it's also managing data protability and the right to be forgotten. And 50% agree controlling access to personal data is a struggle.

# Top GDPR Challenges



## 59%

Say it's figuring out whether or not they're compliant

## 58%

Say it's managing data portability and the right to be forgotten

## 50%

Say it's controlling access to personal data

So, while brands seem to understand the importance of using data for personalization and improving the customer experience, there is still the question of how to take sufficient action to leverage data while remaining trustworthy with customers. The short answer to solving this problem is, you guessed it: data orchestration.

By taking better control of your own data and centralizing it in one place, companies can more easily track customer data preferences, segment audience by consent behavior, and garner insights that help inform the best way to approach customers with GDPR-compliant activities and messaging.

Again, with more of an emphasis on the inaccuracy of third-party data, it's important that your company is aware of the data its collecting, from whom and from where, as well as how that data is going to be used across your marketing activities.

![Lineate]

Data orchestration platforms offer one place to unify all of your data sources and customer consent information to ensure a better understanding of consumer data regulation. Below are a few specific ways data orchestration can help organizations make the most of GDPR.

**1. Capture & Manage Consent Appropriately**

The first aspect of navigating GDPR compliance is capturing consent from consumers. It is imperative to have an easy-to-understand pop up that users fill out to let you know what they do and don't consent to from your brand. But not all pop ups are created equally. If you include too little information, users may not trust you're telling them everything they need to know. Too much, and they may get frustrated and decide to just opt-out for convenience.
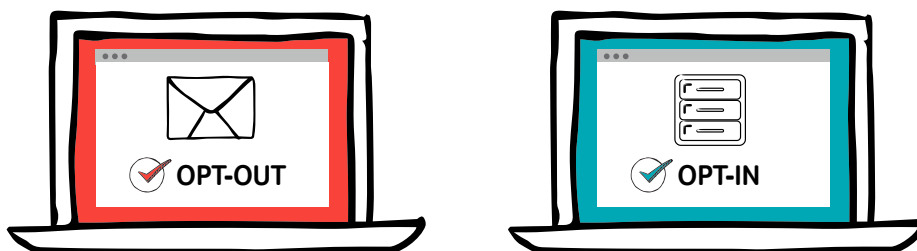
Data orchestration can help companies maneuver this process through unifying, segmenting, and storing consumer data to inform the best way to reach new users with the appropriate consent messaging as well as more easily organize your customer interactions of what data they do and don't want to share.

For example, one way Lineate's data orchestration platform, DataSwitch, was able to contribute to overcoming this GDPR challenge was through a custom solution that used audience tracking to determine if site visitors were from the EU and then auto-deploy a pop-up on the website to earn and test consent capture.

**2. Manage Opt-Outs & Individual Rights**

Even with the right messaging and technology in place, there will still be users that want to opt-out from data collection. Therefore, it's important to have the right tools to automatically remove any information associated with users that opt-out from your database.

There are also many examples where a user may opt-out of only one form of communication and not another. For example, someone may choose to opt-out of your email list, but still allow your company's website to collect their data. No matter the combination of opt-ins and -outs, it is paramount for your organization to have the appropriate technology in place to manage these nuances effectively.

Another way a data orchestration platform can help companies manage customer data requests (such as "the right to be forgotten") is through the generation of both high-level and granular reports on consent. This occurs through the capture of customer data preferences, which are funneled into segments that can then be used for organizing interactions to understand how customers are communicating with your brand about their data.

This means, with centralized data capture your company is able to see who is opting-in to what and on which channel they're doing so. While every data orchestration platform has its nuances, one way DataSwitch stands out is by providing those granular reports and highlighting where the most and least consent is received, i.e. your website pop-ups generated the most consent while your email newsletters generated the least.

**3. Synchronize Your Data & Work with GDPR-Compliant Vendors**

For companies to be GDPR-compliant, they must have a plan in place for organizing, segmenting, and maintaining customer requests. Even if the deadline for compliance has passed, companies need ongoing data management to ensure consent is obtained from new users and to ensure compliance with old customers.

Just think, the data you collect due to GDPR changes, such as location and unique site visits, can also be leveraged in future campaigns too! Having a clean database leads to better targeting experiences, which can ultimately help you reach more customers who actually want to hear what you have to say.

Moreover, the onus is on companies to ensure they're working with GDPR-compliant vendors to prove to consumers that their trust and data is valued within an organization. Whether you're using a third-party for data management or buying email lists to power your marketing activities, remember your company is on the line for anything that isn't compliant.

A data orchestration platform can also assist in the third-party arena depending on its capabilities. For example, DataSwitch provides "data maps," which allow your company and customers to better understand what they've consented to and where their data is being used across outside 3rd party vendors. Remember, users that can see how their data is being used and where are much more likely to consent to data collection because of your commitment to transparency.

While brands are increasingly using data to improve their products, they often end up losing consumer trust in the process. And that is big considering 95 percent of customers say they are more likely to be loyal to a company they trust.[16]

According to a recent Lineate survey, 75 percent of people were, "fine with data collection," if a brand got their permission first (45 percent) or gave them something in return like a special offer or free service (30 percent).[17] This idea of providing privacy, value, and relevance to the customer is never going away. So, as your brand thinks about how GDPR can drive more valuable experiences, it's crucial to have the right data at your fingertips. And the best way to achieve that is through data orchestration.

# IMPROVING THE CUSTOMER EXPERIENCE & ROI WITH DATA ORCHESTRATION

So far, we've discussed the rise in consumer preferences for privacy and personalization, the growing importance for technology that connects and makes sense of disparate data, and the opportunities data orchestration has created for marketers in the era of data regulations. The next logical question for us to answer is: How can your company take advantage of these opportunities and better orchestrate your data to improve the customer experience, and ultimately, increase ROI?

The short answer is (almost always): a data orchestration platform. At Lineate, we view this as customized technology for any-size business that connects siloed data sources, unifies them in one place, and allows you activate this data across any channel to overcome your biggest brand data challenges.

## Data Orchestration In Action

Perhaps in a previous campaign your customer clicked an ad but you didn't capture their email address and in a current, but different, campaign that same customer fills out an email form. A data orchestration platform has the ability to match IP addresses and resolve the identity of that customer by putting all of their interactions in one place to be activated in future campaigns—allowing you to send specialized offers and create more personalized messaging.

According to a CMO Council report on The State of Engagement, customer empowerment is increasing the job security risks of CMOs who are struggling to keep up with new digitally-driven ways to enrich the experiences of more savvy, yet fickle consumers. The report also found that 75 percent of CMOs believe their jobs are on the line if their customer experience strategies are unsuccessful, while over half of respondents believe their jobs are at risk should their technological investments fail.[18]

These metrics aren't surprising when, 84 percent of customers say being treated like a person, not a number, is very important to winning their business.[19]

**84% of customers say that being treated like a person, not a number, is very important to winning their business.**
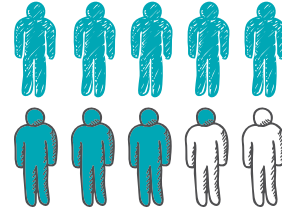
Moveover, 57 percent of customers have stopped buying from a company because a competitor provided a better experience. And, for brands that can't evolve rapidly, the unfortunate news continues with 62 percent of customers saying they share their bad experiences with others.[20]

Additionally, we know that consumers are interacting on more devices and channels than ever before and brands are increasingly gathering data from all of them. But, simply collecting data doesn't equate to "good marketing." It must be taken a step further with the orchestration of clean, organized data to overlay across the variety of platforms in a company's tech stack and activated with specific business goals in mind.

Brands can no longer work from bits and pieces of the customer puzzle or they miss out on opportunities to make lasting connections with consumers. The only way to garner a true 360° view of your customer is by resolving a user's identity into a singular profile no matter what devices they use to interact with your brand—be it browsing the web, buying a product via Instagram, or opening an email.

Let's explore how data orchestration might help you address an all-to-common frustration. In Adobe's 2018 Consumer Email Survey, half of U.S. consumers reported that their preferred channel for contact from brands is email—but there's a lot they don't like about it.[21] 39 percent of respondents said they want marketing emails that are less promotional and more informational.

**39%**

**39% of consumers want marketing emails that are less promotional and more informational.**

A data orchestration platform can create segments based on how customers interact with content across all of your channels and devices. From there, it allows you to deploy emails within the same place based on those segments. The result? More informed, less promotional emails based on what your customers actually care about.

The survey went on to explain that another 27 percent said they want better personalized emails with content that reflects their interests. And 22 percent said they're annoyed by offers that make it clear the data marketers have about them is wrong. By building more campaigns based on first-party data, your communication will be more informed from the get-go—ensuring the information you have on your customers is not only accurate, but robust as well.

Tech giants like Amazon have long understood the importance of leveraging their first-party data to generate ideas that improve the customer experience. The company has done this so well that it has impacted preferences for personalization with 69 percent of consumers agreeing that they expect Amazon-like buying experiences from brands such as product recommendations, past search retargeting and customer reviews.[22]

## 69% of consumers say that they expect Amazon-like buying experiences from brands
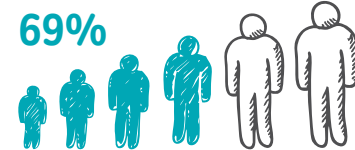
For companies of any size to compete, they need to be integrating their data to deliver insights that drive business. Whether you're looking to create a loyalty program, measure ABM activities, improve attribution, or anything in between, data orchestration is the key to achieving that goal.

### 7 Goals You Can Achieve With Data Orchestration

### 1. Centralize Marketing Channels & Breakdown Silos

Marketing teams have a ton of platforms they use (some which haven't been opened in a while) to reach customers. Instead of manually merging reports from various tools to run search or social campaigns, you can view cross-channel audience data and determine digital ad parameters all in one place, using data orchestration.

Additionally, we know that every good brand is made up of a diverse set of teams, but we also realize this diversity can create the challenge of merging an assortment of tools. Through the intelligent aggregation of tools and platforms across departments, data orchestration is able to provide a single source of truth to consolidate cross-departmental efforts, save time by decreasing manual reporting, improve cross-channel consistency, and inform insights across teams to make more accurate decisions with performance in mind.

### 2. Create a 360° Customer View for True Attribution

Every interaction a consumer has with your brand counts. Whether its social engagement, ad impressions, site visits, or email clicks, an audience manager within a data orchestration platform can help enrich your understanding of customer behavior for more insight. For example, Lineate's DataSwitch is able to use audience ID matching to unify who and where your customers are across all channels and devices.

Ultimately, data orchestration allows you to understand your audience holistically by organizing and breaking down interactions into single customer views. This provides your team with more robust cross-channel segments and deeper behavioral insight to inform better conversion paths and continuously feed that insight back into your audience segments.

### 3. Expand and Enrich Your Audience Data

The beauty of data orchestration? By running campaigns in the platform, you'll automatically collect deeper insights on your customers which will be fed directly back into your segments to improve audience understanding over time.

So, by consolidating your outreach efforts, your company can continually enrich audience segments with behavioral data collected from centrally-activated campaigns. With improved attribution and audience insights in one customizable interface, you can pinpoint which aspects of your campaigns are driving real results and activate these findings to improve the path to conversion—creating something of an "enrichment feedback loop."

### 4. Implement Geo-Targeting

Consumers appreciate brands that provide relevant experiences. By coupling geo-targeting with predictive analytics based on your audience, you can better reach customers with valuable content at the right time and place with the right platform. For example, DataSwitch can help incorporate geo-targeting into your marketing strategy to more easily send relevant offers to customers when they're most likely to make a purchase, thus boosting in-store sales.
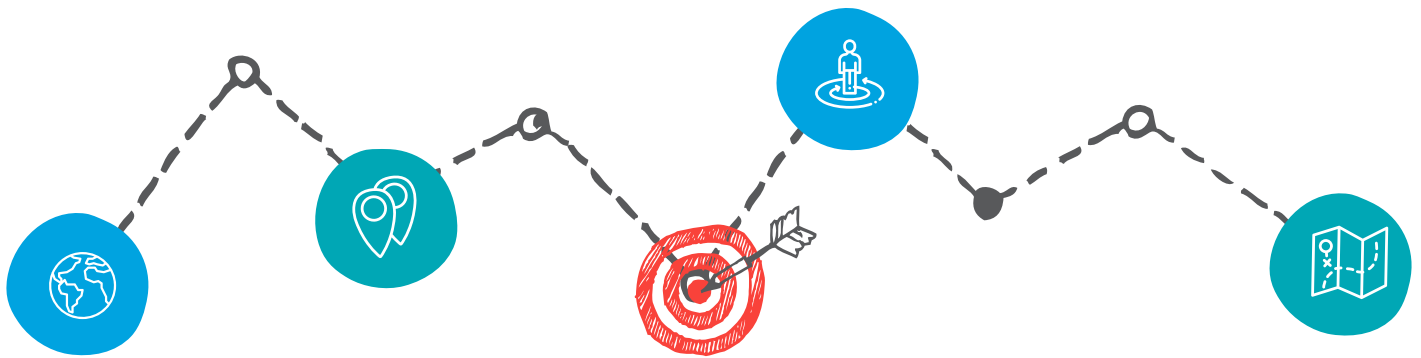
### 5. Leverage and Control Your First-Party Data

All companies run campaigns to acquire new customers through third-party platforms like Facebook or Google Ads. When you upload your first-party data to third-party platforms, however, they receive granular information about your audience: names, ages, past purchases, and more. While third-parties don't use that information from the get-go, they can use it once people from your segments interact with campaigns on those channels. The platforms then have your data in their own segments which are, in turn, used by companies (and competitors) who run campaigns via those platforms as well.

Your audience data should be a major competitive differentiator. But, data becomes significantly less valuable when it's used to inform popular third-party segments. When you run campaigns through an in-house data orchestration platform, it ensures that you only provide third-party platforms with audience ID numbers—not granular audience information. The result? An ability to take control of .

your first-party data to create valuable information that only your company can fully access to target the right people across all channels and devices.

## 6. Connect the Dots for Cross-Channel Success

Whether it's understanding creative asset performance, comparing audience segments, or building accurate conversion path flows, a data orchestration platform gives you more control over your own data by helping you understand who customers are and what they're responding to across all channels.

For example, with DataSwitch's Campaign Manager uses elements of AI to dynamically adjust budget across all activities based on what's performing best and which segments are responding—Helping your brand better build, activate, and measure campaigns that emphasize personalization and performance.

## 7. Augment Third-Party Ad Effectiveness

For brands who publish third-party ad content on-site, data orchestration can also mediate auctions across a variety of demand side platforms (DSPs) using your own data—centralizing ad performance analysis across any and all your properties. One way DataSwitch does this is through its Publisher Manager, which uses a company's own audience data to integrate ad performance analysis across all your properties, after of course mediating auctions across unlimited DSPs to ensure you get the best price possible for ad space. No matter the action or channel, data orchestration platforms make it easier to manage and fill ad units to generate granular insights on performance.

**By prioritizing data orchestration in your organization, you're likely to:**

- Manage multi-system chaos
- Pinpoint attribution
- Simplify personalization
- Promote digital transparency & trust
- And, most importantly: Drive more leads!

# HOW DATASWITCH CAN HELP

Does this sound like something your business needs? Then, meet DataSwitch.

Lineate's DataSwitch platform is able to help with all of the above and more. Our 12+ years of experience building martech and adtech solutions led to this data orchestration platform, which unifies your techstack, integrates your data, activates effective campaigns, and improves ROI. By consolidating all your marketing efforts, DataSwitch can better mix, merge, and map all of your data and activities to increase marketing efficiency and decrease organizational disconnect.

# DATASWITCH IN ACTION: FOREKNOW CASESTUDY

**Company**
Foreknow

**The Idea**
Foreknow wanted to capitalize on the success of geo-targeted offers by analyzing past location data to determine when users are most likely to use a special offer. For example, Foreknow wanted to determine the best time to send a coupon to a customer who regularly passes a coffee shop at 9 AM to improve the likelihood the they will stop in at that location.

**The Challenge**
Foreknow wanted to put its predictive algorithm to use, but wasn't sure where to start. They needed a solution for adapting their technology to different customers, pushing messaging to users, and creating relevant customer segments based on location data. Plus, they needed a proof of concept, quickly, to sell their idea to top global brands.

**The Solution**
Foreknow partnered with Lineate to create a minimum viable product (MVP) using DataSwitch. With DataSwitch's three main modules (Audience Manager, Campaign Manager, and Publisher Manager) Foreknow was able to bring their algorithm to life.

**The Results**
Within six weeks of utilizing DataSwitch, Foreknow turned its algorithm into a fully functional geo-targeting marketing tool and now supports a major restaurant chain with 922 locations across the country, earning $1.8B in annual revenue.

# CONCLUSION

---

Whether your company is just starting out or is a well-seasoned brand, it's clear that customer experiences will make or break your success. More than that, first-party data has emerged as a valuable currency for organizations looking to differentiate themselves with their audiences.

Consumer expectations dictating brand behavior is not going away. Despite how preferences will shift, it has become paramount for companies to better leverage their data for a customer-first approach to business or risk getting left in the dust. After all, 82 percent of them are willing to share relevant information about themselves in exchange for connections between their digital and in-person experiences, while 92 percent are more likely to trust a company with their information if they have the ability to control it. So, what are you waiting for?[23]

In order to meet these growing standards of excellence for personalization, transparency, and security, brands must prioritize a strategy for orchestrating their data to achieve these goals. Whether its overcoming your company's departmental and data silos, inserting yourself into new GDPR opportunities to interact with customers, or simply trying to optimize the technology you have in place, Lineate is here to provide custom solutions that grow with your brand and help transform your business with a customer-first approach in mind.

To understand more about how data orchestration could work for your brand and to see if you qualify for a free DataSwitch trial, visit us at www.lineate.com.

# SOURCE

1 https://www.northeastern.edu/levelblog/2016/05/13/how-much-data-produced-every-day/

2 https://www.emc.com/leadership/digital-universe/2014iview/executive-summary.htm

3 https://www.forbes.com/sites/larrymyler/2017/07/11/better-data-quality-equals-higher-marketing-roi/#73d45c1f7b68

4 https://www.salesforce.com/research/customer-expectations/

5 https://www.adweek.com/digital/infographic-the-importance-of-an-effective-data-strategy/

6 https://www.adweek.com/digital/infographic-the-importance-of-an-effective-data-strategy/

7 https://martechtoday.com/what-is-dmp-martech-landscape-174298

8 https://www.treasuredata.com/learn/cdp-vs-dmp/

9 https://marketingland.com/facebooks-removal-of-third-party-targeting-data-what-we-know-237260

10 https://digiday.com/marketing/data-vendors-struggle-gender/

11 https://www.lytics.com/resources/guides/customer-data-platform-vs-data-managment-platform

12 https://content-na1.emarketer.com/b2b-marketing-data

13 http://adage.com/article/digital/california-passed-version-gdpr/314079/

14 https://www.salesforce.com/research/customer-expectations/

15 http://totalaccess.emarketer.com/Reports/Viewer.aspx?R=2002218

16 https://www.salesforce.com/blog/2018/06/digital-customers-research.html

17 https://lineate.com/infographic-how-consumers-really-feel-about-data/

18 https://www.cmocouncil.org/thought-leadership/reports/the-state-of-engagement

19 https://www.salesforce.com/research/customer-expectations/

20 https://www.salesforce.com/research/customer-expectations/

21 https://www.cmocouncil.org/thought-leadership/reports/the-state-of-engagement

22 https://www.salesforce.com/blog/2018/06/digital-customers-research.html

23 https://www.salesforce.com/blog/2018/06/digital-customers-research.html

# THANK YOU

CONTACT US