

Data Onboarding

CASE STUDY



THE PARTIES



Retail Bank

THE OBJECTIVES

A retail bank wanted to deliver relevant programmatic advertising to their current account holders, with specific messaging for either existing customers or prospects. Their majority of their CRM is limited to offline data, therefore they need to fuse this with online cookie data.

THE CHALLENGES

Traditionally data needed to be shared with a third-party to be matched to cookie data, or for common IDs to be appended. This carries significant compliance burden with multiple privacy and security checks, slowing down the process.

Onboarding has typically been a slow and arduous process, with significant data manipulation required before and the onboarding process begins, which can take up to a week.

STEP ONE



The retail bank uploads its current account data to a secure Bunker. Data goes through InfoSum's AI-powered normalisation and mapping process.

STEP TWO



The retail bank can see the identity partners available and, through InfoSum's automated identity resolution processes, instantly see the intersection between the data.

STEP THREE



The retail bank builds audience segments using the attributes in their own data, and those that are available in the identity partner's data.

STEP FOUR



Once an audience segment has been built, the identifiers within the identity partners data are "tagged" and sent for activation through the retail banks chosen channels.

THE RESULTS



Improved Speed:

With no pre-upload data manipulation required and swift data onboarding, the retail bank was able to onboard, plan and buy their media activity faster and more efficiently.



Increased privacy:

Data movement is limited to the identity graph's own IDs, with no context associated with why these individuals have been selected. This approach greatly reduces the requirements for lengthy InfoSec processes.



Greater transparency:

Through direct analysis of the intersection between their data and the identity partners, the retail bank was aware of the results of the identity matching process, before committing.

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