

Verato Customer Journey

Powered by the patented gold standard in customer matching technology

The challenge

Today's financial services companies work hard to deliver exceptional customer value and experiences. They invest in tools such as master data management (MDM), marketing automation, business intelligence, and customer relationship management (CRM) to deliver a tailored customer journey. Yet, each of these systems contains partial customer data, fragmenting every person's information across your enterprise. Without having a complete and trusted, 360-degree understanding of each customer across their entire journey, knowing who is who™ is impossible. The result is that disconnected data within silos often leads to poor customer engagement, lost revenue, and missed opportunities to support and grow your customer base.

The solution

Verato powers complete and trusted views of the complete customer journey for financial services organizations. Built upon two proprietary identity resolution technologies, Referential Matching® and Match Tiers™, the Verato Customer Journey solution creates an enterprise-wide 360-degree view of your customers by linking the data from your MDM, CRM, and other critical data sources within the enterprise or from third parties.

Verato Customer Journey is powered by an unparalleled national dataset, proprietary smart algorithms, highest levels of data security, and comprehensive customer support. Easy, seamless integration with existing and future IT infrastructure, and executive and user analytics and stewardship tools, yield quick time-to-value and dramatic return on investment for over 90 Verato customers.



Features

- Gain a 360-degree view of every customer, from siloed data across the enterprise and beyond.
- Fully understand customer needs to provide the right services and messages at the right time.
- Link different data sources across your system to create an accurate record without compromising core data.

Customer Journey capabilities

Smart views: Define the best data to view for a customer, based on the needs of the user

Householding: Identify household groups and other relationships

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The Verato approach to customer matching is patented, third-party verified to be more accurate than other approaches in the industry, and built upon two proprietary technologies:

Referential Matching

- A quantum leap forward in building a complete person record within disparate sources
- Achieves the highest customer matching accuracy rates in the industry
- Utilizes our highly curated database of demographic data spanning the entire U.S. population over a 30-year history

Identity A	Verato® Carbon™	Identity B
NAME Katherine Smith	NAME Katherine Smith Kathy Smith Katherine Jones	NAME — — Katherine Jones
DOB 1968-08-14	DOB 1968-08-14	DOB — —
SSN —	SSN 456-78-9012	SSN — 456-78-9012
PHONE (214) 456-5645	PHONE (214) 456-5645 (815) 987-4567	PHONE — (815) 987-4567
ADDRESS — — 123 Main St.	ADDRESS 200 S Madison St. 200 Madison St. 123 Main St.	ADDRESS — 200 S Madison St. — —

Match

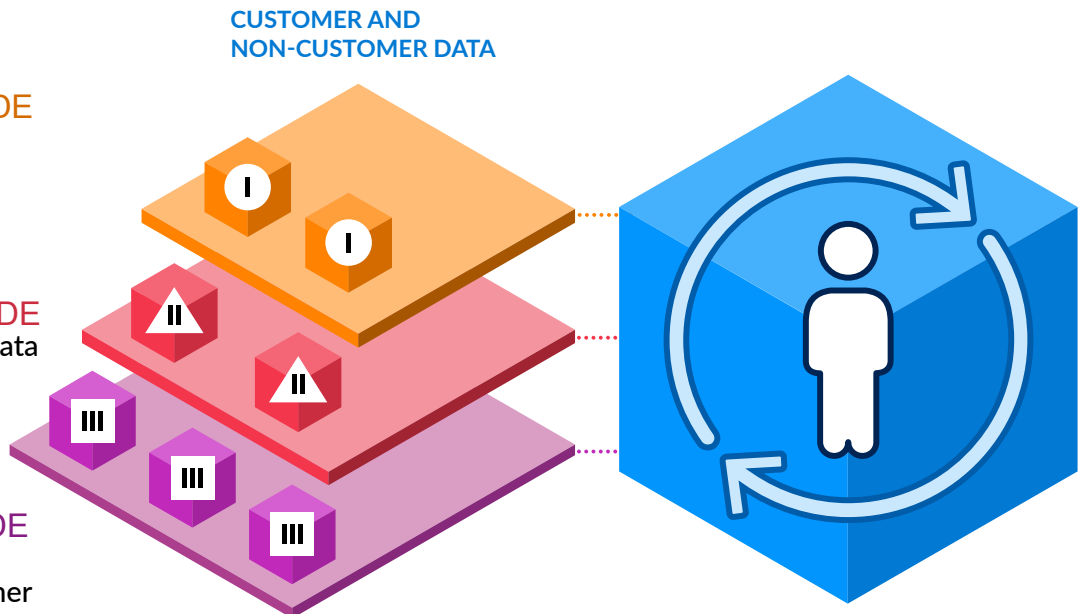
Match Tiers

- Intelligently matches unique groups
- Builds a complete view of people using incomplete records and siloed data across multiple systems
- Will not compromise or impact core data

TIER I
CUSTOMER GRADE
matching customer
data together

TIER II
MARKETING GRADE
matching marketing data
to customer data

TIER III
ANALYTICS GRADE
matching digital to
marketing and customer



Verato, the identity experts for better data management, enables smarter growth, improved efficiency, and actionable analytics by solving the problem that drives everything else — knowing who is who. Only the Verato next generation cloud identity platform enables interoperability across an increasingly complex digital ecosystem with unprecedented accuracy, ease, and time-to-value.