

Success Story

Leveraging Data Cloud for Customer Unification and Segmentation



Introduction

A large US Enterprise struggled with customer profile matching, unification, and segmentation. They partnered with Exavalu for expert consultation and implementation services.

Client Situation

The client wanted to overcome their system limitations by:

- Improving customer matching beyond their current MDM capabilities using advanced matchlogic.
- Reducing their manual effort in customer unification and correcting over-merge scenarios.
- Leveraging real-time history to predict and segment likely customers.
- Generating timely and personalized 'Asks' for episodic events.
- Laying the groundwork for data-driven, repeatable fundraising strategies.

How Exavalu Created Value

We collaborated with our client to implement a Salesforce Data Cloud solution and address their system limitations. We conducted deep data profiling to tailor unification and predictive models, while standardizing and cleansing data to boost fuzzy match accuracy.

The next thing we did was generate predictive customer propensity scores to facilitate customer segmentation. We seamlessly integrated Data Cloud with Teradata and Salesforce CRM via MuleSoft and enabled real-time data flow across core fundraising systems.

We automated Salesforce Ask creation to update customer propensity scores.

Benefits

- 250K additional customer matches unlocked through enhanced unification.
- ~26% increase in daily customer unification via improved fuzzy logic.
- Accurate customer propensity scores to aid segmentation.
- Real-time insight generation.
- 27M+ customer profiles processed.
- AI/ML-powered propensity prediction for targeted outreach.

