

# The checklist for seamlessly unifying your customer data

## THE GOLDEN RULE

- ✓ **Choose a data unification expert to accompany you in the project!**

### UPSTREAM OF THE PROJECT

- ✓ Accept decompartmentalization
- ✓ Define a sponsor
- ✓ Define the right objectives

### IDENTIFYING DUPLICATES

- ✓ Define 3 identification fields for the same client
- ✓ Apply them consecutively as duplicate filters
- ✓ Take fuzziness into account, these elements that are approximations made during data entry that are the source of duplicates in the databases of department tools

### MERGING

#### What needs to be merged?

- ✓ Keep the oldest duplicate, complete it with the most recent data from the other records
- ✓ Give priority to data with the most reliable source
- ✓ Discard irrelevant “noise” words when comparing customer records

#### When should it be done?

- ✓ In real time at entry if your solutions are interconnected within the IS
- ✓ In batch mode, in regular processing, if your IS configuration is compartmentalized
- ✓ Never, but with a Golden ID that links the duplicates of the same customer, when the customer relationship logic requires it (multi-brand group, customer with several residences, etc.)

### WITH YOUR EXPERT, YOU CAN CUSTOMIZE FOR YOUR COMPANY

- ✓ Percentage of proximity
- ✓ Score calculation
- ✓ Consistency check