



CDP Institute Standard Use Case	
Name	Combine Data for Merger
Problem	Link customer profiles from separate systems as before or after merger.
Solution	Ingest data from different companies; use rules and reference data to link related IDs; create unified profiles.
Benefits	Identify shared customers and create more complete profiles more quickly.
KPIs	Nbr of records matched, % of correct and incorrect matches found and missed
Task 1	Load and standardize customer identifiers from different companies, using reference data
Task 2	Define and verify matching process
Task 3	Apply matching process, create and apply persistent personal and/or company IDs
Task 4	Standardize and combine account data into unified customer profiles
Task 5	Measure results
Task 6	
Related Materials	
Tags:	
• Function	Extract, Unify, Expose Data; Identity Resolution/Unification
• Goal	Acquisition - Conversion; Grow Value; Retention
• Feature	Ingestion API; Client-Built Data Load; End-User Data Load; Schema-Free Data Load; Persistent ID; Probabilistic Match; Golden Record; Direct Access; Cross-Campaign Arbitration; Multi-Channel Campaigns