



CDP Institute Standard Use Case	
Name	Combine Online and CRM Data
Problem	Link online and offline data relating to same customer.
Solution	Ingest data; use rules and reference data to link online and offline IDs; combined related data into unified profile.
Benefits	Profiles are more complete; can measure impact of cross-channel promotions.
KPIs	Nbr of records matched, % of correct and incorrect matches found and missed
Task 1	Load and standardize online and offline customer identifiers, using reference data
Task 2	Define and verify matching process
Task 3	Apply matching process, create and apply persistent personal IDs
Task 4	Load and combine online and offline 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	Cookie Management; 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