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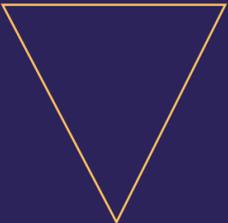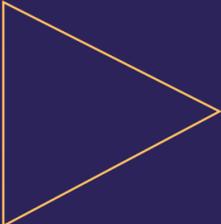# **M**arketing Data
Management
Guide

We're Friendly And Available To Chat. Reach Out To Us Atanytime And We'll Happily Answer Your Questions.

TALK TO AN EXPERT

Summary

Effective data management is essential for success. Balancing multiple opportunities to find the best marketing investments relies on data, as does finding and delivering the most effective treatments for each prospect.

Businesses make strategic decisions based upon a variety of data points. Marketing data management may be becoming more important for marketers, but it isn't getting any easier.

In this guide we explain best practises and maturity level assessment.

What is Marketing a Data Management

Marketing data management refers to the processes governing how information is gathered, evaluated, and integrated into a single point of reference.

Modern API links data across silos to create a single clear view of the marketing data from different sources and channels.

Marketers are expected to base their decisions on sound data, and a robust strategy is critical to achieving this.

Comparing data from multiple analytics tools increases the chance that mistakes will be made, such as double-counting website visitors or failing to collect consistent contact information.

Data can be incomplete, the company infrastructure couldn't accommodate some new data formats or increased volume of data, like unstructured data from text messages.

These errors and oversights ultimately lead to less useful data and uncomfortable questions from management. What's needed is a single source of truth.

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Marketing Data Management

▷   ▷   ▸   Best practice

1 **Prioritize data protection and security.**

First of all, this is an essential step to take to ensure your company doesn't fall victim to a data breach and endanger the information of your entire customer base.

If we've learned anything from Facebook, it's that people really don't like it when unknown sources gain access to their personal data.

Data protection and security need to be a number one priority when it comes to your business's data management.

2 **Simplify access to traditional and emerging data.**

More data generally means better predictors, so bigger really is better when it comes to how much data your business analysts and data scientists can get their hands on.

With access to more data, it's easier to quickly determine which data will best predict an outcome. SAS helps by offering an abundance of native data access capabilities that make it easy to work with a variety of data from ever-increasing sources, formats and structures.

Best practice

3 **Reduce duplicate data.**

There are many ways that your company could receive duplicate data from a lead or customer, and you should have processes in place to handle potential redundancies.

If a lead is opting into multiple lead magnets or offers, or if a customer is returning to make another purchase, ensure your company has processes in place to avoid duplicate data being added to your data management system.

Although many companies may not think about this when first setting up their data management, it's essential to create systems that allow data to be updated or changed when someone opts in more than once or makes a return purchase.

Putting in precautions when it comes to duplicate data and redundancies is just another way to ensure your data stays clean.

4 **Strengthen the data scientist's arsenal with advanced analytic techniques.**

SAS provides sophisticated statistical analysis capabilities inside of the ETL flow.

For example, frequency analysis helps identify outliers and missing values that can skew other measures like mean, average and median. Summary statistics helps analysts understand the distribution and variance – because data isn't always normally distributed, as many statistical methods assume.

Correlation shows which variables or combination of variables will be most useful based on predictive capability strength – in light of which variables may influence one another, and to what degree.

Best practice

5 Ensure your data is readily accessible to your team.

There's a fine line between security and convenience when it comes to accessing your data. You want it to be absolutely impossible for someone without the proper permissions to gain access to your company's customer data, but you don't want authorized personnel on your sales and marketing teams to have to jump through hoops just to access the information they need to do their everyday job.

It's a smart idea to set up particular logins and access permissions for people based on their specific role/data needs. Executives or team leaders who may need to access more customer data than analysts or sales representatives need to have more permissions than those who only need certain types of data.

This also helps to ensure protection for your customer data within your own company.

Setting up different levels of permissions makes it easier for your team members to access the necessary data rather than trying to set up blanket rules and permissions that can cause issues, be too restrictive in some cases, or be too open in others.

6 Scrub data to build quality into existing processes.

Up to 40 percent of all strategic processes fail because of poor data.

With a data quality platform designed around data management best practices, you can incorporate data cleansing right into your data integration flow.

Pushing processing down to the database improves performance. It also removes invalid data based on the analytic method you're using, and enriches data via binning

(that is, grouping together data that was originally in smaller intervals).

Best practice

7   Shape data using flexible manipulation techniques.

Preparing data for analytics requires merging, transforming, de-normalizing and sometimes aggregating your source data from multiple tables into one very wide table, often called an analytic base table (ABT).

SAS simplifies data transposition with intuitive, graphical interfaces for transformations.

Plus it lets you use other reshaping transformations like frequency analysis, appending data, partitioning and combining data, and multiple summarization techniques.

8   Share metadata across data management and analytics domains.

A common metadata layer lets you consistently repeat your data preparation processes. It promotes collaboration, provides lineage information on the data preparation process, and makes it easier to deploy models.

You'll notice better productivity, more accurate models, faster cycle times, more flexibility, and auditable, transparent data.

Best practice

9   Use a quality data management software.

Finding good software is an essential step in creating a quality data management process for your company.

Investing in the wrong data management software can cause issues upon issues.

Whether it's too complex for your team to understand, too large of a system for your business's needs (some data management companies only focus on enterprise companies rather than businesses of all shapes and sizes), or not secure enough for your business to feel comfortable relying on, there's a lot that goes into finding the perfect data management software for your needs.

Marketing Data Management

Maturity levels

	Basic	Marketing automation	Integrated marketing	Customer management
MArketing Capabilities supported	Un-coordinated prospecting campaigns in each channel	Coordinate prospect treatments between email and web forms. Personalize email and web forms. Report on marketing-generated leads.	Coordinate and personalize prospect treatments across email, web, call center, & other channels. Automatically pass leads from marketing to CRM, Segmentation and campaign triggers based on behavior across all channels	Coordinate & personalize prospect and customer treatments across all channels for entire lifecycle. Base treatments on data synchronized across all channels in real-time. Select treatments during real-time; Select treatments during real-time interactions on web, mobile apps, call center, etc
ingestion (Data shared in Marketing Database)	None	Email web forms, and website visitor behavior	Email, web forms, & web visitor behavior; CRM, call center, & external enrichment; Include unstructured data elements (e. g. search terms, social media posts)	Email, web forms, web visitor behavior, CRM, call center & external enrichment. Company operational system (order processing, customer service, accounting, product usage, etc)

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Marketing Data **M**anagement **G**uide.
Built by Marketers for Marketers

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Here at Improvado, we understand these challenges well — after all, we went through the pain of building it ourselves.

Our product is our bread and butter and we've gone far beyond the basics to build **a true marketing ETL platform** that frees up engineering time while giving marketers the data they need.

What you buy from Improvado is beyond the aggregation and standardization you'd expect to build yourself: you buy a world-class solution that is focused, around the clock, on continued innovation and automation, to give you unrivaled insights and optimization capabilities.

Our teams build and support integrations, improve infrastructure and monitor system performance, and constantly work to add new features.

Our data science team is devoted to spotting discrepancies, and our technical support team is working 24/7 to handle any data flow errors or API issues that arise, and our first-class customer success team is always available to makes sure the platform is serving your needs.