

Understand Identity within the Evergage CDP



The Evergage customer data platform (CDP) helps businesses aggregate all of their customer data in one place for analysis and activation purposes. One result of this aggregation is that it is now possible to understand every one of your customers on an individual level so you can recognize and communicate with each one across channels. For this reason, the concept of individual identity plays an essential role in the customer experience and in any customer data platform.

This Article Explains

This article explains the concept of identity resolution as it relates to the Evergage CDP.

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- What is a Customer Profile?
- Multiple Profiles for One Person
- Resolve Identities through Profile Stitching
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What is a Customer Profile?

Central to the Evergage CDP is a unified customer profile which defines the customer's identity using data gathered from a variety of sources across all channels, regardless of whether that person is known or anonymous.

This single, comprehensive profile is the foundation of any data analysis effort or activation (personalization) campaign. You can use it to determine things like whether each individual should qualify for certain promotions, which product or content recommendations each individual should see, which channel to use to communicate, or when to send an email and which one to send, all based on information gathered across all channels, whether they are on or offline.

The profile includes data that helps you understand the prospect or customer (e.g. purchases, browsing history, email interactions, attributes, subscriptions, loyalty membership and status, interests and preferences, browser type, location, demographics, predictive scores) as well as identifying data elements that provide a connection between different records (e.g. cookies, email address, full name, physical address, phone number, system ID).



Bring Data In from
Outside Data Sources



Customer Data Platform
with a Unified Profile for Each Individual

Multiple Profiles for One Person

Your goal is to have a single profile for each individual, but it's still possible to end up with multiple profiles for the same person. When data comes from different sources, it needs to be stitched together into one single profile. This is simple when there is clear identifying information (i.e. the same email address), but not every person will clearly identify themselves in every channel for every interaction. The separate profiles created in the following situations all contain important customer data, but each one doesn't fully account for the person's true and complete identity:

1. **A B2B site visitor** completes a form to download a report and includes her name and email address. The company now can identify her when she is on the website. However, sometime later she uses a different browser to visit the site again. While her named profile still exists, she now has a new profile that captures her website activity as an anonymous visitor.
2. **A retail store shopper** makes several in-store purchases with his loyalty number. The retailer has his name and other identifying information through the loyalty program, along with a history of his in-store purchases. Later, he browses the e-commerce site numerous times, but never makes a purchase or identifies himself in any way, so his named in-store profile remains separate from his anonymous website behavioral profile.
3. **A customer of a bank or insurance company** receives an email from that firm, reads the email, and then clicks through to the website. Later she calls the call center to discuss the same topic covered in the email and that she researched on the company's website. In this scenario, she may be seen as three different people, based on her interactions across the company's email, web, and call center systems.

Resolve Identities through Profile Stitching

Evergage will stitch profiles together when the data becomes available to do so. For example, consider a visitor named Mary Smith who has one "Mary Smith" profile and one "anonymous" profile in the Evergage:

- **"Mary Smith" profile** – Mary has a named profile in Evergage that encompasses data from several different channels (store, call center, mobile app)
- **"Anonymous" profile** – Mary also has an anonymous web profile for your site because she has never identified herself on her laptop

Evergage will merge these profiles together once she identifies herself in some way, such as clicking through from an email to the company's site while on her laptop. Once it becomes clear that the anonymous person is actually Mary Smith, both profiles need to be stitched together to create a full picture of Mary.

To do this, Evergage constantly monitors identifying information, then uses deterministic matching to determine if two or more profiles represent the same identity.

Then, Evergage stitches these different profiles together based on clear, unique identifiers such as system ID or email address. For example, if a person visits your site multiple times but never identifies himself by doing something like making a purchase, registering for a webinar, or signing up for a newsletter, his profile remains anonymous. The first time he does provide his email address, Evergage will recognize all of his past sessions that took place with the same cookie, and stitches his anonymous profile together with his new identified profile.



Prioritizing Identifiers

While it's certainly not ideal to have several profiles that reflect one individual, it's also a problem to have data from more than one person reflected in a single profile. Since each business has a different set of identity sources and a different tolerance for error and false positives, Evergage gives you the power to add your own rules about your view of the trustworthiness of different data types and decide what action to take when there is a conflict. There are different scenarios that each business should explore to determine what logic makes sense to apply.

For example, you may want to:

- Merges profiles if they match on one type of field (i.e. email address), but not on another (i.e. physical address)
- Match profiles on email address and physical address, but prioritize the email over physical address

Also, you may want to value some sources more highly than others if there is a conflict. For example:

- The email address a person uses to click through to your website may be more likely to be accurate than the email he adds to a website form (where he may add a fake email address to try to download a piece of content)
- You may regard a customer's loyaltyID as more trustworthy than her phone number