



# UCP Checklist



Creating a unified customer profile is the key to developing B2B Marketing campaigns that are personalized and omnichannel.

**You can do this by achieving three goals:**

- Unifying customer data from all internal systems
- Tracking customer activities across channels and devices
- Using the data to deliver personalized experiences

Let's dive into what you'll need to develop a UCP for your B2B clients.

## How to Create your UCP

- ☐ **1.** Review your customer experience/journey to understand how they interact and on which channels.
- ☐ **2.** Integrate customer data from all your systems. This should include:
  - Firmographics (Company Info)
  - Contact & Lead Data
  - Purchase & Opportunity History
  - Technographics (Tech Installed)
  - Sales team/customer support interactions
  - Marketing campaigns engagement (Ads, Email, etc.)
  - Product engagement/items added to cart
- ☐ **3.** Use identity matching for each customer, so you can track their interactions (by email address, transaction ID, device ID, cookie ID, IP address, account number, salesforce ID, agent name or ID, etc.).

You have three ways to do this:

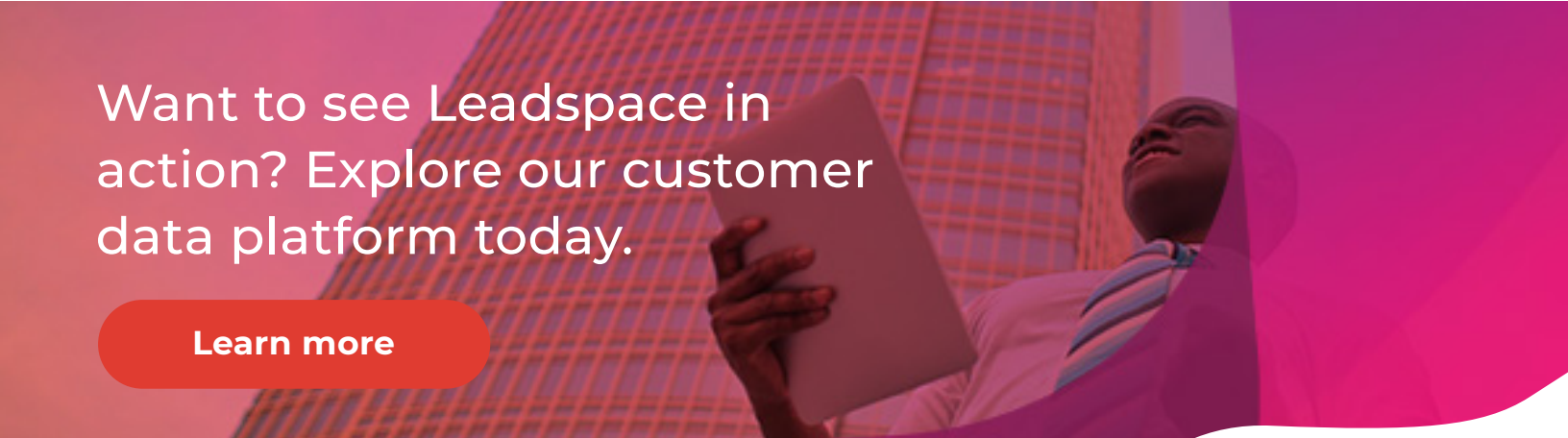
  - Persistent ID: Internal identifier assigned to customers (never changes).
  - Deterministic matching: Links customers to a persistent ID based on their interactions (i.e., an account is logged into on a specific device, then linking that device to the account).
  - Probabilistic matching: Uses analytics to identify a customer associated with multiple identifiers (i.e., account using multiple devices registered to the same IP address is probably the account holder).
- ☐ **4.** Ensure your identity matching merges historical and future data (in real-time) for improved analytics.
- ☐ **5.** Provide all of your customer-facing teams access to the UCP.



## Using a UCP to Deliver Personalized Customer Experiences

- Empower your sales and customer service teams with up-to-date user profiles, so they can know who they're talking to (and how to relate).
- Provide in-app/website recommendations to customers based on their UCP data.
- Create personalized customer experiences using data collected from multiple channels.
- Deliver the right message at the right time (on the right channel).
- Estimate the odds of a customer converting on a particular campaign.
- Improve the customer journey based on analytics collected from customer interactions.

With Leadspace, you can simplify and streamline the process of unifying customer data and creating in-depth, highly-accurate UCPs. Want to see Leadspace in action? [Explore our customer data platform](#) today.



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