# Three Reasons Why You Should Care About Data On-boarding

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### What is Data On-Boarding

Data on boarding is transferring all your offline data about customers to digital world -either to your CRM system or to your marketing databases.Although data on boarding is not a new topic, most of the concepts and its applications to a real life is not yet understood well by most of the marketing experts and entrepreneurs. Finding out customers offline purchases and matching them with online marketing campaigns made sense to the first eCommerce platforms. When a customer just bought something from you, it doesn't make sense to make an online ads that target the same product which they bought the next day. The smart marketers use offline data to learn about habits of retail customers and create smarter marketing segments. However, data on-boarding has also become very essential for companies who do not deal with retail and physical selling too. Data on boarding is essential in both CRM and marketing activities of your own company. Although it may seem that data on boarding is complex and involves a lot of technology, it is not the case. Most of the customer data is already stored online. And for offline databases such as call centers there are already ready-made solutions available in the market. If your customers use a mobile device, you can analyze what kind of websites they visited before encountering an article in your website.  Mobile applications are able to identify a key associated with the hardware. Your online behavior can also be identified by your ip address and geo location. On boarding systems match your offline(mobile and web) activities with the associated customer and then remove a customer's identity for privacy concerns. You can then be able to analyze users behavior before landing to your website. Last year, Google has launched  [Google’s custom audiences solution](http://marketingland.com/google-email-address-audiences-customer-match-adwords-144307) which allows advertisers to upload email lists of the leads and customers to google and to target them with specific ads. This was a huge move towards making data on boarding topic number one importance again. Before google, Facebook already had a solution available to attract custom audiences through Facebook advertising platform. There are other solutions available in the market, like [LiveRamp](http://liveramp.com/) which you can use to segment your audiences. You can upload customers information like email and physical address to a platform, then, the system matches the identifier information with information in mobile devices, with its own offline databases and then the identifier information is removed for privacy. You can then use the data for intelligent segments and targeting your audience. There are several types of data which you can onboard: offline data about the customer and online data about your prospects and leads.

## What kind of data is worth being onboarded for small businesses?

**Event Transactions** - if the customer has made a purchase from you, most probably it is recorded in another system, or offline. If you recorded it from different system, you should ask vendors to export it for you. **Phone Conversations** - if you are not recording phone conversations with customers, you should. If you do not have technical resources to record every call you have with a customer, you should take a note of customer service calls and record it in your crm system. **In person demos and presentations** - personal demos are powerful, because they make you to understand the customer, their questions and their concerns while you are presenting them your product physically.

## Three Reasons Why Smart Marketers Should Care About Data Onboarding

**Offline data is bigger than you think** If you are in retail business, 90% of all transactions go offline. If you are in consulting service business, all your interactions with customers including phone calls and meetings happen offline All important trade-shows and conferences happen offline. Thankfully, nowadays, most conference attendees are scanned, swiped, badged, and ID’d before the entry. If you want to create a buyer personas for your marketing campaigns, there is no way to analyze the behavior of the customer without seeing the offline data. When offline data is on-boarded, you can see the broader picture about the behaviors of your buyers. **You need to analyze the source of the conversion** If you have ads both in online and offline medium, you will have to analyze which medium was effective before making the most marketing decisions. Smarter marketers analyze the data from different segments including offline and online. **Switch product goals with customer goals** Smarter marketers analyze the users behaviors that is covered beneath the surface. Knowing what kind of business goal or a personal goal your potential customer is trying to achieve before encountering your solution is a huge asset for marketers. Offline data helps to create need based segments from users point of view. Slack is a good example of a company which tries to achieve users goals with a software. When users just signup for a free trial, instead of providing some training and demo videos, it asks what functional and personal goals users are trying to achieve with a software. Users learn to use slack at the same time answering questions about their goals and expectations.