Contact Data Harmonization & Deduplication

Customer Case Study – An Orthodontist (Healthcare) Practice
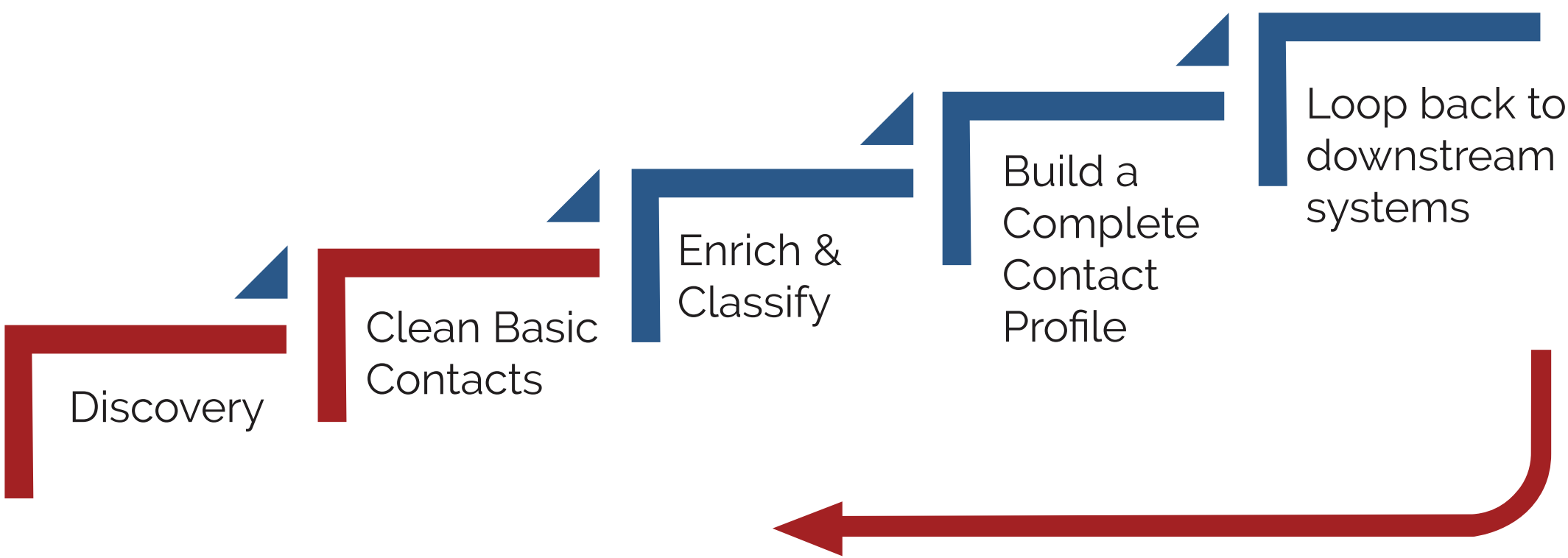
Business Need

The customer had engaged on a digitalization project which involved organizing several events over time. The success of the digital marketing effort was heavily dependent on acquiring a customer contact master list. A bad contact master list would not only hamper or slow down the digital market efforts; it could eventually impact its success. Multiple systems or spreadsheets had a contact name stored differently throughout the organization. To run effective digital marketing campaigns and to measure their effectiveness, a concise contact list must be available along with reliable email addresses, a connection to accounts if possible, and well-defined classifications of contacts.

Customer Challenges

- Duplicated customer names within the same database and across databases
- Disparate data silos
- Disintegrated systems
- Non-standardized customer naming format

Solution Provided

- Syntelli began by identifying each source and understanding what raw data was useful for the target structure. This approach formed a basis for business rules.
- The target structure was defined based on newly established business standards
- The team started development using Power BI to map and transform (data cleansing), leveraging on the business rules for each data source.
- A data source was created by combining processed data from all the sources.
- The team developed customized codes in Python, using the business rules, to group members of a group together using the same group number and assign sub-IDs to each unique member within the group.

Discovery → Clean Basic Contacts → Enrich & Classify → Build a Complete Contact Profile → Loop back to downstream systems

Process Flow

Impact of Solution

- A master list of contacts for marketing campaigns
- Identification of duplicates within the system
- Identification of related customer contacts
- A customizable solution that can be extended to any customer list in the organization

Technology Used

- SQL Server
- Power BI
- Python