Category

Commercial Excellence

Commercial Data Architecture & Single Customer View Playbook

Building one genuine customer record commercial teams can trust, not five partial ones

- Practitioner
- Advanced
- Template Included

- Administrator
- 15 January 2020
- 3 minute(s)

Overview

A framework for commercial data architecture and single customer view — resolving customer identity and consolidating commercial data across CRM, billing, and support systems into a unified, trustworthy view, addressing the specific data architecture foundation that commercial excellence initiatives across sales, marketing, and customer success all depend on.

Why does a single customer view matter beyond having customer

data accessible in various systems? Accessible data spread across multiple disconnected systems with inconsistent identity resolution means the same customer often exists as multiple partial, sometimes contradictory records — a genuine single customer view resolves this fragmentation into one trustworthy record commercial teams can actually rely on.

What's the most common technical challenge in building a single

customer view? Identity resolution across systems with different customer identification conventions — matching records that represent the same customer but were created independently in CRM, billing, and support systems without a shared identifier.

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