

Customer Insight Framework: 12 Steps to *Complete Customer Insight*

The Customer Insight Framework sets out 12 foundations for an integrated data model for scholarly publishers.

Core Data Model



- 1 A **single view encompasses all customer types** (individuals, institutions or companies, and consortia), and all available customer info is clearly attributed to one or other of those types.
- 2 There is a **single, unique record** for each individual, institution or company, and consortium, in each case with a single identifying name plus any additional alternative names.

Why Do I Need This?

A complete and fully-integrated customer view is an essential foundation for almost all sales and marketing activities: including effective up-selling and cross-selling, targeted campaigns to drive renewals, article submissions and email signups, and accurate analysis of market share and key prospects.

Essential Information



- 3 Each customer record provides **key contact details** (including name and email). In the case of institutions, companies and consortia this should identify their key buying contacts.
- 4 Appropriate **opt-in/contact permissions** are clearly established for each customer, including resolving any conflicting opt-in settings from different systems.
- 5 Accurate **product info** is available for each customer, including active/lapsed access rights, product cost, and with consistent naming of products and access types.
- 6 Summary **usage data** is available for each customer with product access, providing monthly download totals per product, and enabling cost-per-download as a key usage metric.
- 7 Summary **author submissions data** is included for each customer, both for individual authors, and also counting total submissions from each institution.
- 8 Each record also incorporates any **additional profiling info** available for each customer, such as alert signups, registered interests, and pay-per-view purchases.

Relationships and Hierarchies



- 9 Relationships are established between **individuals and their parent organisations**, enabling the counting and listing of all contacts at each institution or company.
- 10 Relationships are established between **organisations and their subsidiary parts**, such as university faculties and departments, and regional offices of worldwide corporations.
- 11 Relationships are established between **consortia or multi-site deals and their member organisations**, including each organisation's access rights via such deals.
- 12 The **inheritance of access rights** is clearly modelled, defining where institutional and corporate purchases give access to subsidiary organisations and/or their affiliated individuals.

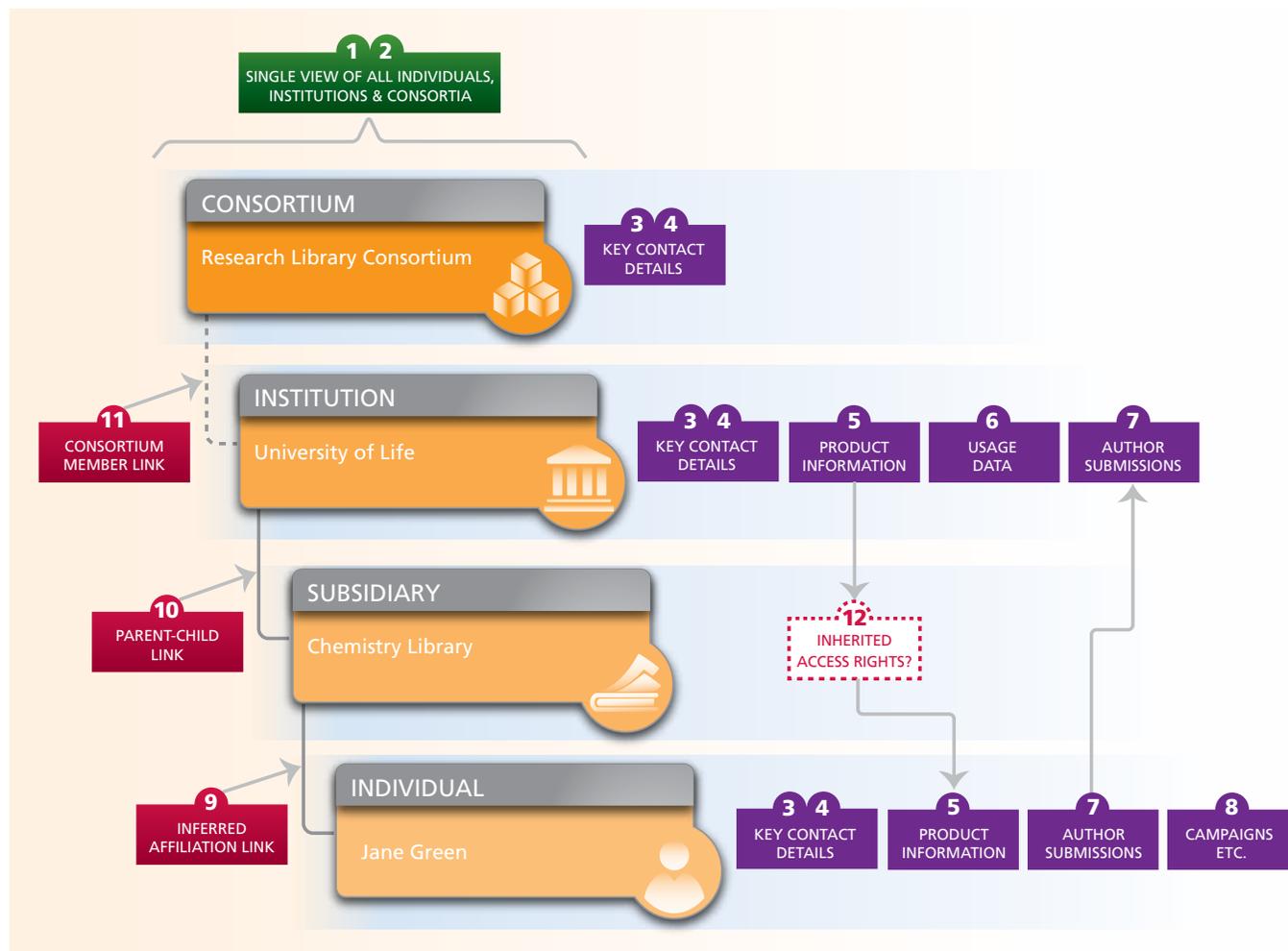
Putting Principles into Practice

If you'd like to discuss how the Customer Insight Framework can be made to work for you, please don't hesitate to get in touch:

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Scholarly publishers must deal with a multi-level customer base of individuals, institutions, and big deals, with various complex relationships between them.



You're in Good Company...

The 'Customer Insight Framework' has been endorsed by several major publishers, all of whom are placing customer insight programmes at the heart of their sales and marketing activities.

