

HOW A RESORT CREATED TRUST IN DATA THROUGH PROFISEE MASTER DATA MANAGEMENT

Client

Boyne Resorts is a privately held company that owns and operates mountain, ski, lakeside, and golf resorts across North America, as well as an outdoor lifestyle equipment/apparel retail division with multiple locations.

Company Size

Large organization consisting of more than 11,000 employees, including seasonal workers, 11 resort properties, and multiple retail locations.

Technologies

- Profisee
- Azure SQL

Services

- Master Data Management
- Data Engineering
- Data Integration
- Data Stewardship
- Data Quality Improvement
- Data Profiling
- Third-party address verification and standardization

Challenge

Boyne Resorts, a large company operating multiple properties, faced the challenge of organizing and managing a large volume of customer information stored in different point of sale systems at various ski, golf, lodging, and retail locations.

Each property or retail location had its own siloed fulfillment system with relevant customer data. These systems were used in isolation from the other locations and properties.

The marketing team had the daunting task of manually aggregating data from these different sources to create campaigns and develop insights about their customers and their activities. Completing this process on a regular basis was time consuming, and the data was not always trustworthy, impacting marketing's effectiveness.

Marketing also had limited visibility into the activity for a particular person, so segmenting customers into skiers, golfers, hotel guests, or more importantly, those who frequented multiple Boyne properties, was difficult and often inaccurate.

Bottom line, **Boyne needed to trust its data**, but the data collected in the different systems had varying

degrees of quality, and **it was hard to tell which was the real source of truth.**

Without fixing the data quality issue, the company could not rise to a larger **business challenge of developing a 360-degree view of the customer.**

The marketing team had a vision to create a consolidated view of their customers – and tap into the customer data, purchase history, and property visits so that they could better serve customers and improve their experience when visiting the resorts. This 360 view would help them create efficiencies, improve customer service, and enhance the customer experience.

Working with several outside vendors, Boyne embarked on a comprehensive Customer 360 initiative that included using three new tools and processes to support customer service team members and leadership.

Boyne selected Profisee, a master data management solution, to consolidate the company's customer information from their siloed data sources. This single master data management (MDM) tool also provided the backbone to continually capture and update customer data on an ongoing basis.

Profisee recommended Onebridge to perform the implementation of the Profisee MDM tool, and that's how we entered the

picture. This implementation would consist of ingesting customer data from multiple data sources, evaluating the integrity of the source data, and ultimately consolidating those disparate customer records into a single "golden record" for each customer.

Solution

Initially, as a certified Profisee partner, our job was to implement and configure Profisee, while closely collaborating with Boyne internal stakeholders and the external service providers who were also helping with the larger Customer 360 initiative. We would need to work with



them in relation to the overall enterprise data architecture as it relates to MDM, data integration, and publishing with Profisee.

While what we did is important, *how* we did it, as Boyne said later, was especially unique and helpful. Our team didn't blindly do the work in a silo. We put thought into how design and configuration decisions would impact the success of the Customer 360 initiative and the organization as a whole.

Boyne especially valued that our Onebridge team members highlighted the tradeoffs and implications of setting customer match rules. At every crossroad, we helped our client think through the pros, cons, and impacts of the current decision and provided recommendations about better options, drawing from our experience. This happened with data integration, data integrity, data stewardship, and other parts of the implementation, as well.

Taking the time to have those planning discussions paid off in the long run, with Boyne addressing issues early that otherwise might not have surfaced until later. In this advisory role, our responsibilities expanded, and our work with the company continues to this day.

Phase 1: Implement Profisee

Our initial goal was to merge customer data from multiple systems into Profisee, perform

customer data profiling to improve quality, and create a golden customer record as the single source of truth.

This is a step-by-step overview of what our team did:

- Conducted stakeholder interviews to gather requirements about Boyne's 11 different systems (including six unique customer databases) that contained customer data.
- Installed Profisee in the existing Azure environment used by Boyne Resorts, employing Profisee's Platform as a Service (PaaS) install methodology.



- Analyzed and profiled the customer data from each data source. This enabled us to provide Boyne leadership with a snapshot of the data quality and completeness of the data in each source system.
- Ingested and integrated the data into Profisee.
- Completed address verification for source records using the Melissa Address Verification service. Other customer address verification steps were included in the overall customer matching (see next step) to enhance the overall quality and accuracy of the final golden record for each customer.
- Developed a matching rules strategy in Profisee, which included the creation of multiple match rules to group customer records into match groups. These rules were then iteratively adjusted and improved to more accurately match customer records from the different systems into match groups.
- Developed a survivorship strategy to create a golden customer record using the strongest source of truth for each customer data field.

The heart of master data management was that last step, updating the match rules in Profisee. Doing so, we were able to deliver a comprehensive set of master records that would



be the foundation for the overall Customer 360 initiative, providing all of Boyne Resorts with a comprehensive view of each customer.

Phase 2: Data Stewardship and Master Product/Service Inventory

In Phase 1, for the sake of getting the minimum viable functionality in the hands of users, Boyne decided to automate golden record creation without using manual data stewardship.

That meant that the matching of customer records from the source systems would result in an automated “match” or “no-match” without the ability for stewards to make adjustments to matches through stewardship tools.

While Profisee would automatically match approximately 90% of the records, the remaining portion were no-match records or “edge cases,” in which separate golden customer records actually refer to the same customer and potentially should be matched.

The follow-up data stewardship work we did involved updating the automation to flag edge-case scenarios to allow for improved quality across the data set. The process now alerts a Boyne employee highly familiar with the customer source data to address those edge-case records and make decisions about which customer records should possibly be merged or remain as separate customer records.

A second goal was to consolidate the inventory of products and services so that our client can create a master inventory of products and

services. The problem was that Boyne’s various resorts bundled different products sold on their separate ecommerce sites.

For example, a customer could purchase a bundled package that includes lift tickets and ski rentals at one resort, but that same bundled package was created and named differently at another resort. This inconsistent product naming and creation process prevented Boyne from getting useful analytics across the organization.

To rectify that issue, the team imported products and services from the various resorts into Profisee and built a metadata management system to tag products with different labels and descriptors. For example, a product type could



be labeled “ski rental” or be tagged as a product for “children” or “senior citizens,” etc. Assigning various attributes to a group and describing the products enabled further analysis of usage and consumption.

Gaining visibility into the product inventory will enable Boyne to manage a complete, consistent set of products (or services) that will ultimately allow them to better target customers with tailored offerings.

It will also provide deeper insight into the preferences and customer experience at different locations. This phase is now complete, and our client has access to analytics that are helping them tailor offerings to different customers.

Phase 3: Data Harmonization

In an upcoming phase, Onebridge will focus on harmonizing data between Profisee and the various source systems. Data harmonization means each of the source systems will have access to, and be updated with, the customer golden records maintained in Profisee.

The availability of a single, golden record in Profisee is being utilized within the Salesforce customer contact records, and data harmonization will ensure the records changed in Profisee will be sent to the separate source systems that are still being used for point-of-sale interactions with customers.

Results

Before Onebridge arrived, Boyne Resorts had siloed, disparate data that they couldn’t trust or act upon. Their customer information was not trustworthy, nor was their data about the products and services used by customers. The result was less effective marketing campaigns and outreach, added costs for manual data wrangling by marketing, and a disjointed customer experience in some cases.

Our work resulted in the following:

- Integrated customer data from 11 separate source systems, including 6 customer databases.
- Successfully implemented and configured Profisee.
- Significantly improved data integrity.
- Created single, trustworthy “golden” record for each customer.
- Improved processes to remove duplicate edge-case customer records.
- Developed understanding of bundled products/services and how to use that information to inform more targeted, relevant marketing campaigns in the future.
- Increased efficiency and reduced marketing costs.

Outcomes



360° view of customers in Salesforce, never before available



Single source of truth, enabling trust in building and running marketing campaigns



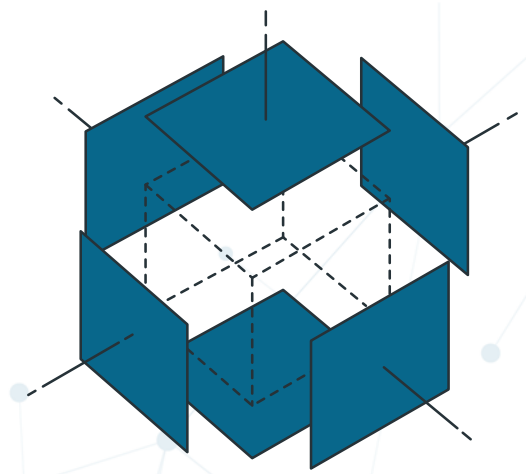
Improved customer experience



Enhanced marketing performance



Increased productivity for customer service team members



Building a 360° view of our guests is foundational for enabling incredible service experiences at our properties. Thanks to the efforts of OneBridge and our other partners, our service and marketing teams are already applying this new foundation to strengthen guest relationships.

- Thad Quimby, VP Technical Marketing