

First-party data is a marketer's most valuable asset. Customer relationship management (CRM) data is a type of first-party data collected directly from consumers—say, for example, business addresses or an email list of newsletter subscribers, that can be used for CRM targeting strategies. With our CRM Onboarding tool, powered by LiveRamp, you can take your best asset and employ it in a CRM targeting strategy to re-engage your audience and retarget at scale.



What's CRM Onboarding?

The CRM Onboarding tool, powered by LiveRamp, allows you to bring offline data online to uncover your most valuable users and create highly-targeted custom audiences.

What's CRM Targeting?

CRM targeting allows you to activate onboarded data within a campaign to target people who are already engaged with your brand. You can also layer on additional targeting tactics like third-party data.

How It Works



Choozle, in partnership with LiveRamp, processes CRM records using a deterministic matching model and leveraging a user database of over 1 billion devices and 250 million unique users. This results in a high degree of confidence that user profiles in your custom audience are the unique individuals listed in your CRM list.

CRM onboarding can use a combination of the following identifiers: email addresses, postal addresses, and phone numbers. These can be both personally-identifiable or anonymous data points such as MD5 hashed files for email addresses.

- 1 Download the CRM template under Manage My Sites/CRM Upload.
- 2 Add your CRM data to the Excel sheet.
- 3 Upload your CRM list into the Choozle platform.
- 4 Once the CRM list shows the status of "Completed," you can create a custom audience.
- 5 Use the CRM data to create a first-party custom audience for targeting within the Audiences tool under the "CRM List" navigation.
- 6 Add the custom audience to an ad group in your campaign.



Notes & Best Practices

- To unlock CRM Onboarding, activate a Data Package. At the end of each month, you'll be charged a \$1 CPM for any uploaded records within that month.
- To ensure privacy compliance, we require that at least 100 records with the same identifier are onboarded at a single time. For example, if you upload 1,000 hashed emails and one postal code, the CRM list will be rejected.
- CRM lists match 30-70 percent of the individuals from your CRM list. This is dependent upon the location of the consumers in the list, and the quality and freshness of the data uploaded.
- If you are using hashed emails as an identifier, use MD5. Do not include both a plaintext email and an MD5 hashed email in the same document.
- When uploading postal addresses, a full address must be provided. Each section of the postal address should correspond to the column headers. The state column must be a state code, e.g., CO, AZ.
- All phone number identifiers must be 10 digits without hyphens, e.g., 6305558052.
- CRM Onboarding is only available in the United States and the United Kingdom. CRM lists must be uploaded into separate regional accounts.
- By uploading data, you acknowledge you have the right to utilize the data and for this express purpose. You're also authorizing that you have explicit opt-in privileges to use these audiences and include any and all opt-out options within your website's privacy policy.