

# TEAVARO

TRULY CONNECT

## IDENTITY MANAGEMENT

### Abstract

First-party identity resolution is the way forward in a world without 3rd party cookies and device id's. Read on to learn how from Teavaro.

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## KNOWING YOUR CUSTOMER ACROSS MULTIPLE TOUCHPOINTS

First-party identity resolution – or the ability to connect your customer data to active users’ devices – is key to improving marketing insights, optimising ad spend, and delivering a good customer experience.

The tech giant platforms (Facebook, Google, etc) have managed to provide a personalized experience tailored to a user’s preferences and needs, and they can do this because users identify themselves by logging in to use these platforms. Most brands and publishers, however, have only a few percent of their customer base logging in and therefore simply do not know who visits their website. Creating a 360° view of the customer and personalizing the digital experience is assumed by most MarTech vendors, but in reality, very few companies are even close to attaining this. The core challenge is to connect the customers known in your CRM system with those that use your own website or even the websites of your media partners. To achieve this, marketers must put lots of effort into first-party identity resolution, overcoming identification issues including browser restrictions on third-party cookies and ad blockers.

For Identity Management to overcome the many identification challenges it needs to provide a unique set of capabilities for identity resolution across devices, channels, and domains. With an identity graph supporting identification throughout the lifecycle from anonymous visitor to loyal customer, an identification dashboard helps to monitor progress in the digital identification and cross-domain linking of your customers and leads.



FIGURE 1: Customer Identification

## IDENTITY GRAPH

Every activity across the user's devices leaves crucial data about the customer which if stitched together correctly can become extremely valuable over time. On average, consumers use four devices each day, and the chances are they will not login on most of these devices. Your analytics tool will likely show each device across one user as a different anonymous visitor. A person typically has a number of identifiers such as work and personal Email address, a physical address, a mobile and fixed phone number and a customer number which is specific to your business. People can be grouped according to different criteria like belonging to the same household, receiving the services under the same billing account or belonging to the same company. These people will each use multiple devices such as their PC, mobile phone, laptop, gaming con-sole, smart TV, and so on.

The challenge is to link user-level identifiers with device-level identifiers to create an identity graph. Sometimes even device-level identification is confused due to multiple cookies being used across browsers and applications. Other complications arise when multiple users use the same device, such as a Smart TV or household PC that can only be identified by WLAN but not the individual users that use this WLAN. Capturing these relations can still be valuable from a marketing perspective.

Marketers can connect first-party data and identifiers with digital devices to create a deterministic device graph and build comprehensive customer profiles. This graph is built on an own proprietary user-level and device identifier.

These are linked together and in addition references between profiles can be created to describe specific relationships like a user has been seen on a home WLAN. The links are created through identification pipelines that support different digital identification methods.

### IDENTITY GRAPH:



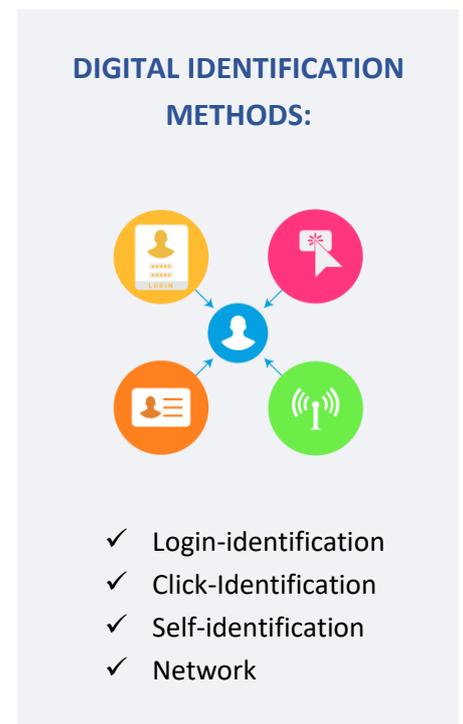
- **User level identifiers (PII)** such as customer number, personal Email, mobile or fixed line telephone number, name and address.
- **User Groupings** such as Household, Billing Account, Company.
- **Device level identifiers** such as 1st-party cookies, 3rd-party cookies, Mobile Advertising IDs, MAC address

FIGURE 2: Identity Graph

## DIGITAL IDENTIFICATION METHODS: CREATING AN IDENTITY GRAPH

The first time an anonymous user visits your website or app, a visitor profile is created by our platform and a 1st-party cookie – is set by the server (not JavaScript, which brings limitations). If the user accesses the website or app again from the same device and browser the user will be recognized (1st-party cookie identification) as long as that cookie is not deleted. To digitally identify a user as a customer or lead (anonymous to known identification), one of the following four methods of digital user identification can be used:

- **Login-identification:** The device on which the login happens is linked with the identity graph. Examples: App login, self-service portal or e-shop.
- **Click-Identification:** The clickthrough contains an identifier used to link the device on which the link is opened to the identity graph. Examples: Email click to web, SMS click to web, App click to web, all via browser redirect to also set a 1st party cookie.
- **Self-identification:** A user provides an identifier in a digital dialogue. The device on which the dialogue happens is then linked to the identity graph. This method can be used, for example, as part of a newsletter subscription on a website or a user is explicitly asked to give his email in return for sending a voucher to that email. This method can also be used to collect missing identifiers such as mobile phone numbers.
- **Network identification:** The user is identified through IP address resolution. This method can be used if you are a network provider or partnered with a network provider. There are two types of network identification: Mobile network user identification and Fixed net (cable or DSL) identification, which typically identifies a household.



**FIGURE 3:** Digital Identification Methods

## IDENTITY RESOLUTION

Identity Resolution is the process of creating and utilizing the identity graph to combine customer information from disparate sources. To build a rich identity graph, all your digital endpoints need to generate information for the identity graph and direct marketing and service communication links in emails and SMS should be redirected to those endpoints. This lays the foundation for an identity graph that has the following capabilities:

- **Cross-domain:** If a company owns different domains or partners with another site, a user that visits different domains is identified on all domains even if the user could only be device identified on one domain.
- **Cross-device:** A user can be identified across multiple devices regardless of the device used. The prerequisite for this capability is that the user has a common identifier, for example hashed email from login, which gets linked to the identifier of that device. As a “device” can have multiple device identifiers generated by different browsers on the device or cookie deletion it is important to find a way to aggregate them.
- **Cross-channel:** A user can be identified across different channels (own website, own app, third party media, third party app, chatbox, speech assistant, email, SMS) if digitally identified on that channel.
- **Cross-lifecycle:** A user can be in different lifecycle stages from anonymous visitor to loyal customer.

### IDENTITY RESOLUTION:



- ✓ Cross- domain
- ✓ Cross- device
- ✓ Cross- channel
- ✓ Cross- lifecycle

Identity resolution, together with the necessary user consents, provides the foundation for personalised marketing in an ever-improving feedback loop. As your identity graph becomes richer you can make your marketing messages more relevant which increases your customers’ responses, in turn improving your identity

**FIGURE 4: Identity Resolution**

Identity resolution that supports the customer lifecycle needs to provide the following capabilities:

- **Visitor to customer conversion:** Visitor profiles are merged into customer profiles.
- **Visitor to lead conversion:** Visitor profiles are referenced or merged to a lead profile.
- **Lead to customer conversion:** lead profiles are merged into a customer profile.