



White paper

Multilevel account hierarchy: A guide

1 Introduction

Achieving a singular, 360° view of the customer or lead has long been a key goal for marketers, but for too many, it remains difficult to achieve. This challenge is due in no small part to the fragmented internal ecosystem of data and point systems in which so many companies find themselves. And for enterprises with multiple lines of businesses—each potentially employing different tech stacks and data models—the challenge could be all the more dire.

A number of marketing automation solutions have emerged, offering the promise of consolidating a company’s data sources to enable audience-centric, omnichannel engagement. While these solutions have achieved this promise to varying degrees of success, the challenge—of consolidating, individualizing, and activating audience/lead data not just within one particular company, but across all of the business units (BU) in an enterprise—is of an entirely different scale.

And of course, consolidating the data is a critical step, but it is only the first one. Enacting individualized, omnichannel engagement across all levels and units in an enterprise requires detailed user access, streamlined data governance, timely access to analytics, and more. Organization-wide audience centrality is a highly coordinated endeavor, and it needs a solution capable of overcoming the myriad challenges in its way.

This guide examines the multitude of marketing challenges faced by complex enterprises. It provides a detailed view of how Resulticks’ unique multilevel account hierarchy capability can overcome those obstacles to empower all relevant parties in an enterprise and facilitate organization-wide audience centrality. It also uses a case study to look at how the capability has delivered outcomes for a Resulticks client.

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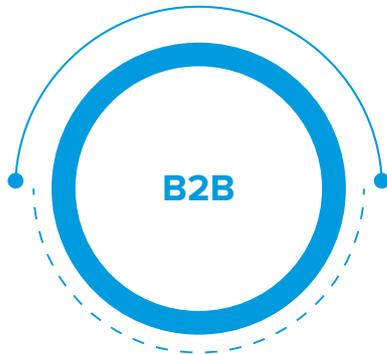
2 | The challenges in the absence of a unifying solution

It is more than likely that an individual—be they a B2C consumer or B2B buyer—has been interacting with a number of their brands from the same enterprise. This individual could have different relationships with each of these brands. They may be a frequent shopper for one, a seasonal buyer for another, or a lapsed lead in need of re-engagement for yet another. Moreover, each brand may have collected data on this consumer—behavioral, psychographic, transactional, propensity, and more—that is not available to its counterparts.

These issues make it difficult for the enterprise's brands to acquire a singular understanding of their shared consumer. This can result in fractured communications and unsatisfying customer experiences with the enterprise as a whole. In addition, different entities throughout an enterprise's organizational structure may have relied largely on siloed systems, making it difficult to even consolidate audience data on their end. Specific brands or lines of business that were acquired could have legacy tech stacks different from those employed by their counterparts in the family, which might further prevent effective consolidation.

However, even when the same legacy systems are employed across the enterprise, consolidation may still be difficult. While some marketing automation solutions can be configured to support multiple entities in one instance, this is not possible if the entities are using different data models, attribute sets, and so on. But what if a consistent data model is indeed adopted? There is still the question of whether the data architecture of the solutions in question is sophisticated enough to recognize the varied, constantly evolving identities an individual may have across entities.

Performance tracking and decision making can also be hampered. Since marketing and audience analytics are isolated at the individual entity level, the enterprise sometimes has to resort to manually exporting and compiling the reports to be assessed by key decision makers at the line of business, regional, or even global level.



More issues emerge for non-B2C enterprises. Quite often, the sales teams of a B2B enterprise utilize different CRMs, especially if certain entities were acquired. While conventional marketing automation solutions can overcome the challenges we just covered to varying extents, most simply do not support the integration of a single platform instance with multiple instances of CRMs, thus driving up total costs of ownership and again creating potential discoordination.



For B2B2B/C players that depend heavily on the marketing efforts of their last-mile associates (LMA) or related partners, acquiring and managing the capabilities to meet their unique needs from conventional solutions is no easy task. The enterprises lack efficient means of monitoring their LMA's marketing performance, and there isn't a pre-existing tool for coordinating engagement in terms of targeting, content development, and more. If the LMAs themselves are using different marketing automation solutions, the whole process becomes even more

3 Adopting an organizational approach to true audience centricity

When operating in this difficult situation, the enterprise can only eliminate the fragmentation and inefficiency by establishing a regular, committed internal process for pulling data from the different marketing solutions employed across its organization.

Despite best efforts, this approach can be counterproductive. It utilizes a time-intensive process for enabling omnichannel marketing communications, which are supposed to be executed, optimized, and analyzed at scale and in real time. The result? Inability to keep up with the ever-moving omnichannel consumer; irrelevant, inconsistent experiences; lost opportunities for cross/up-selling across brands; and diminished revenue potential.

In short, this simply won't work if enterprises want to elevate their marketing efforts in the age of omnichannel. For them, it's not enough to deliver a seamless journey across touch points and over time from isolated brands. They need to adopt an organizational approach to audience centricity, one that leverages data and insights across all relevant entities to provide an experience that is exclusive to the individual customer.

Resulticks' multilevel account hierarchy capability was created to support just that.

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Multilevel account hierarchy by Resulticks

Omnichannel marketing—for B2B, B2C, B2B2B, and B2B2C businesses—is a holistic commitment that involves the contributions of team members throughout almost every level of an enterprise. Resulticks developed its multilevel account hierarchy capability to:

- » Declutter tech stacks at an enterprise-wide level
- » Simplify the management of platform/data access at different hierarchical levels
- » Integrate, dedupe, and activate data from subsidiaries in real time to deliver singular customer views and enable individualized engagement
- » Streamline decision makers' and marketers' access to relevant analytics
- » Facilitate coordinated, continuously optimized marketing communications across the enterprise and its partner network

The unique capability goes beyond simply establishing data connections among individual BUs. It helps the enterprise create a sophisticated account hierarchy and access built-in features that empower everyone in their organization—from CMOs and regional marketing directors to country marketing managers and campaign specialists to LMAs.

Resulticks also frees enterprises from the confusion, inefficiency, and costliness of having to juggle multiple instances of marketing automation solutions and CRMs across BUs. Able to support multiple BUs in one platform instance, Resulticks greatly declutters the enterprise's tech stacks across the board, all while enabling clients to manage and measure each BU both individually and as an aggregate.

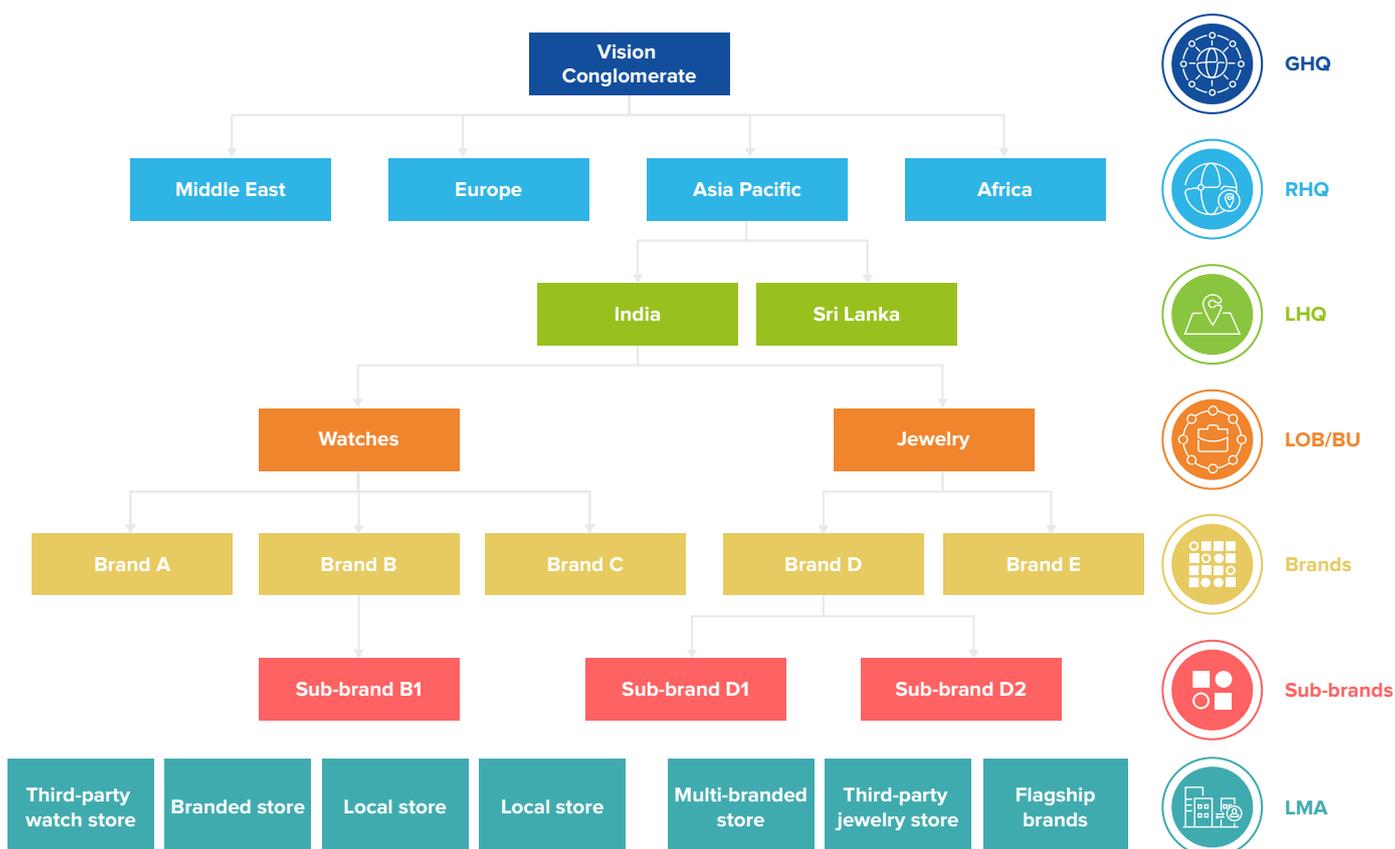
There is also no limitation on the business types that need to be set up. The business units set up in the same Resulticks instance can operate in B2B, B2C, B2B2B, or B2B2C models. This allows for a great deal of flexibility in how the platform's diverse functionalities can be utilized, and it all depends on how the enterprise wants to define its unique account hierarchy.

Setting up an enterprise-specific account hierarchy

Resulticks' flexible built-in functionalities, streamlined configuration processes, and expert-driven implementation support combine to enable every enterprise develop an account hierarchy tailored to its exact needs.

For every entity, the enterprise can:

- » Determine hierarchical levels such as global headquarters, regional headquarters, local headquarters, lines of business, brands, and LMAs
- » Define campaign types, engagement/conversion definitions, key analytics metrics, personas, lead scoring mechanism, communication frequency, etc.
- » Map out data attributes as well as where they will be utilized on the platform (e.g., personalization, lead scoring)
- » Manage user access and role-based permissions at different hierarchical levels
- » Identify where metadata layers will be set up in the hierarchy
- » Determine the relevant analytics from subsidiaries that can be viewed by decision makers



Unifying, activating, and securing data across the enterprise

One of the key differentiators of Resulticks is its integrated **Customer Data Platform (CDP)**, which serves as the central data engine that fuels capabilities across the solution. The incorporation of the CDP at the foundational level is rooted in the belief that data will always be the foundation of future-forward marketing efforts. This same concept extends to the multilevel account hierarchy capability.

Each entity's Resulticks CDP unifies all of its data and utilizes the platform's robust **audience identity resolution** capabilities to offer a singular, constantly enriched view of the customer or lead. With many solutions, brand A, for instance, will not have access to any audience data beyond what is available in its internal ecosystem. If Clara has expressed interests in social media ads from brand B in the enterprise, this attribute—along with perhaps a variety of others—could be relevant to brand A's marketing efforts. It could reach out to her with communications informed by the insights, or target her with contextual cross-upselling offers.

This is made possible through the **metadata layers** in Resulticks' multilevel account hierarchy. The enterprise, during implementation, can map out the array of attributes that could be relevant to multiple regional teams, lines of businesses, brands, and so on—data that might not be available to all entities or would have been siloed in specific databases—with no compromise to privacy. It can set up metadata layers above specific brands or at the regional headquarter level, for example.

What these metadata layers do is that they centralize data relevant to all the entities below it, thus leading to:



Efficient data storage

Instead of taking up storage in each entity's database, the common attributes will be stored in the metadata layer, thus reducing load on individual systems.



Expedited data access

The metadata layer eliminates the need to manually export relevant data and go through approval processes before sharing among entities. Thanks to the Resulticks CDP, audience data, regardless of its point/entity of origin, will have been cleansed and scrubbed, thus ensuring its value to enterprise peers. The hierarchy capability also enables adherence to segregated entity-specific databases and consent-based cross/up-selling at the individual level.



A singular, cross-entity customer or lead view

The entities will enjoy a view of the individual customer or lead that is unified using data from not only internal sources but their counterparts in the same enterprise.



Relevant, contextual communications across the enterprise

By keeping each entity updated with real-time audience data from others, the metadata layer makes it much easier to avoid delivering repetitive or irrelevant communications.



Rigorous security throughout the hierarchy

On top of Resulticks' standard multilayered security offerings for each entity, the hierarchical structure enables the granular-level control of information access by allowing the mapping of user roles at all relevant levels. It also prevents the sharing of customer data with other entities for marketing usage without express consent from the individuals themselves—which can be captured by Resulticks' streamlined processes.

In addition, the CDPs of different entities will be continuously augmented with new data captured from both their own integrated sources and campaigns by subsidiaries below them in the account hierarchy. For example, the enterprise's Southeast Asia headquarters' marketing communications and strategies could be optimized with critical behavioral or derived audience data captured by the Malaysia team.

This feature is called the **audience data roll-up**, and the enterprise can define how exactly it shall take place based on its marketing needs and internal policies. Moreover, this feature does not apply to LMAs to avoid tampering with their databases, offering more assurance to onboard the platform as part of the enterprise's Resulticks-enabled ecosystem.

To ensure optimal security and regulatory compliance, Resulticks keeps each entity's database segregated at the account level. It provides further protections through its **multilayered security** measures that encompass robust tokenization and encryption, secured data transfers, and more.

Delivering the right insights to the right level

We've already touched on the difficulty for entities relying on siloed, legacy systems to present the right analytics different leaders need in time and without complicated manual efforts. So how does Resulticks address this?

It does so through the **analytics roll-up** feature. Whether the decision maker in question is the CMO or a campaign manager, they can "roll up" real-time analytics from lower hierarchical levels to get an aggregate view of audience and communication metrics such as ROI attribution. They can also zero in on the performances of specific entities or even LMAs.

To help high-level marketing leaders share valuable insights they deem valuable to specific subsidiaries, such as sudden shifts in lead behavior, Resulticks has included the **insights roll-down feature** in the multilevel account hierarchy setting. The marketing leaders at the Canadian office might not have access to the breadth of insights enjoyed by their superiors at the global headquarters. This particular feature allows global marketing leaders to share those valuable insights with their regional peers to improve their teams' marketing performances.

Streamlining engagement coordination at every level

Enterprises often have to set up regular meetings and workshops to align the marketing efforts of their subsidiaries and partners. Many have found great success through this approach, but it might not always keep up with the speed at which omnichannel B2B/B2C or B2B2B/C marketing shifts today.

Resulticks' multilevel account hierarchy includes a range of streamlined sharing and distribution options to help enterprises disseminate the latest campaign recipes, segmentation criteria, content templates, and creatives to the right subsidiaries or LMAs. Subsidiaries can also be granted the ability to customize the materials they have received for further localization. Resulticks also offers a built-in approval workflow to facilitate the review of communications across the organization.

This functionality allows Resulticks clients to track campaign performance across their distribution channels, then import real-time interaction and lead data from all brand and partner databases into the CDP. We connect these disparate touch points to individual users with our built-in AI-driven matching algorithms.

Supporting B2B2B and B2B2C marketing

B2B2B and B2B2C enterprises can view and align marketing efforts across their entire distribution chain. Resulticks provides a clear, top-down view of each partner or LMA's marketing activities and performance. It also enables the enterprise to share materials such as campaign recipes, segmentation criteria, and creatives with partners to ensure their communications align with the brand and strategic objectives. To maintain privacy and security, the database of each partner or LMA remains behind a firewall and is not visible to others.

Managing enterprise marketing as an agency

Resulticks enables agencies to manage their enterprise clients' end-to-end omnichannel marketing efforts through a single platform, regardless of their individual license type. It can also leverage the multilevel account hierarchy capability to customize each enterprise client's organizational structure according to their specifications. In addition to its usual security and compliance offerings, Resulticks also allows no data sharing between client accounts under an agency's management.

5 | A case study

A major multinational conglomerate adopted Resulticks to be part of the new technology engine driving their move towards AI and data-driven digital transformation. With a truly global presence and a large number of companies across industries under its operation, the client wanted to translate the vast amount of data scattered across its ecosystem into continuous, personalized customer experiences that transcend brand boundaries and drives top-line growth across the board.



What Resulticks is delivering

As an integrated omnichannel marketing platform, Resulticks simplified the client's tech stack across brands. It also provided the robust technology foundation that can manage the volume and complex business requirements of the large number of brands undergoing the same marketing transformation process.

Resulticks facilitated the creation of a centralized loyalty and audience profile program thanks to its built-in CDP and the metadata layers incorporated into the client's unique multi-level account hierarchy. This makes it possible for a customer to, for instance, earn loyalty points across brands or enjoy an equally personalized experience when they interact with another brand in the client's ecosystem for the first time.

Moreover, Resulticks has been enabling the creation of over twenty new AI-powered, omnichannel use cases for each brand under the client. And the client's senior leaders will access a significantly more streamlined process for exploring marketing and ROI analytics.

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Conclusion

Restricted by legacy systems and data silos across their organization, enterprise marketers are looking for a way out. But transitioning towards contemporary solutions might not be enough. They need integrated solutions that can free them from depending on point systems and truly accommodate the complex marketing needs at various levels of their enterprise ecosystem. This white paper provides an introduction to Resulticks' multilevel account hierarchy capability, which was designed to tackle the data, communication, and analytics challenges faced by today's enterprise marketers.



About RESULTICKS

Resulticks is a real-time, big-data-driven marketing cloud solution built from the ground up by experts in marketing, technology, and business strategy to deliver topline growth. Outcomes-focused and enabled by the world's first customer data blockchain, Resulticks equips brands to make a transformational leap to true omnichannel engagement. With its AI-powered, customer-centric approach and attribution at the segment-of-one level, Resulticks is changing how brands worldwide reach, acquire, and retain satisfied customers.

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