

The logo for reSonate, featuring the word "reSonate" in a white, sans-serif font. The letter "S" is stylized with a white circle around its center, and the "e" is lowercase. The background is a solid orange color with a large, abstract graphic of overlapping, colorful lines (blue, yellow, white, purple) forming a continuous, flowing shape on the right side of the page.

reSonate

Evolved Insights.
Inspired Connections.

CRM Insights
Client Training

Updated 9.27.2022

Agenda

- Benefits of CRM Insights
- How Does It Work?
 - Overview
 - File Formatting Rules
 - Step-by-Step LiveRamp Instructions
- Understanding Match Rates
- Best Practices



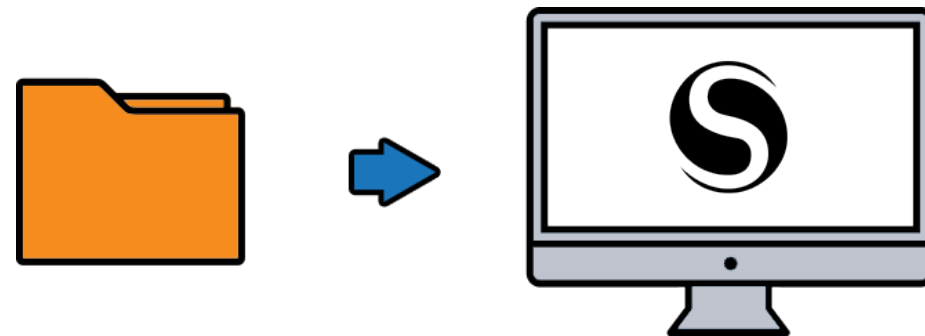
Benefits of CRM Insights

CRM Onboard

Onboard your 1st party offline files to Resonate via LiveRamp

Benefits:

- Gain a deep understanding of people on your CRM file* using Resonate's 14K+ insights, including consumers personal values, psychographics and media consumption habits.
- Don't just re-create audiences that look like your customers - Onboard your *actual* customers to view insights on them in Resonate.
- Develop your buyer personas using your new and improved understanding of your customers, and even uncover segments you haven't tapped into.
- Integrate offline and online data to improve your content and messaging strategy, reach your target audiences successfully and reduce media waste.



*100K minimum file size

CRM Insights Benefits

Insights

- Gain a deep understanding of the people and the customer defined segments in a CRM file, using Resonate's 14K+ insights
- Provide insights on people that may not interact with your digital properties or website
- Use Resonate's insights to improve content and messaging strategy
 - Ex. A retailer has an offline list of customers interested in a new product but doesn't know enough about them
 - Ex. An Auto Manufacturer has customers in their warranty database with no way to hit them with a tag
- Historical view: Return insights on previous customers prior to any tag implementation

Activation

- Enrich your CRM file with Resonate Insights, then activate
- Directly activate those people in your CRM file – without Resonate Insights

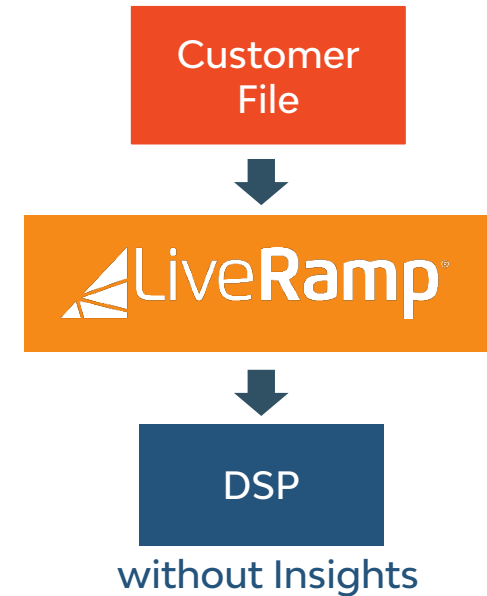
Two Ways to Activate

What do you want to do?

**ENRICH CRM FILE WITH RESONATE INSIGHTS,
THEN ACTIVATE**



**ACTIVATE PEOPLE IN YOUR CRM FILE WITHOUT
ENRICHING WITH RESONATE INSIGHTS**





How Does It Work? Overview

How Does CRM Insights Work?



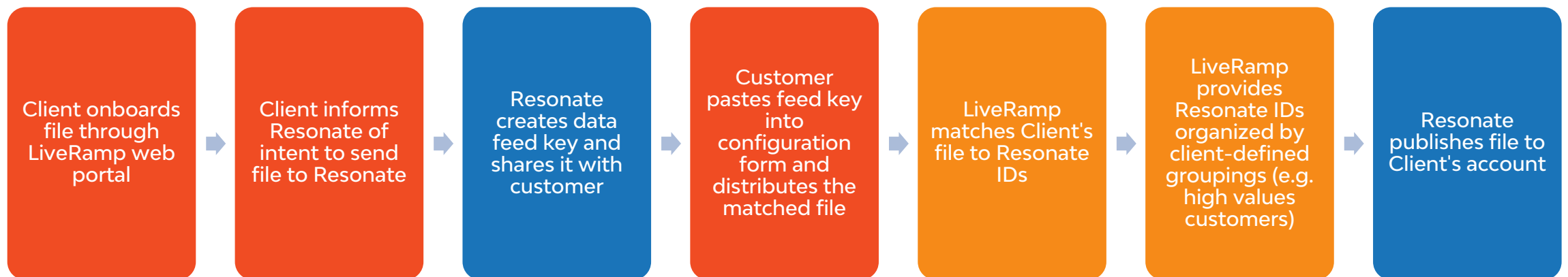
End-to-End Process: With Resonate's LiveRamp Seat

- Resonate holds a direct reseller contract with LiveRamp
- Resonate invites you to LiveRamp Connect via email, where you upload your files
- Data upload happens through LiveRamp Connect web portal (optional FTP for larger files only)
- Send Resonate your data dictionary
- Repeat these steps for each file you need to upload
- When you're done, let us know and we'll take it from there – We will publish your file into Resonate
- Only you can access your own customer account. No other Resonate clients can see your data. Nobody can you see your PII, not even Resonate.



End-to-End Process: With Client's LiveRamp Seat

- Using your LiveRamp account, onboard your file through the LiveRamp web portal
- Let Resonate know you want to send your file to Resonate
- Resonate creates a Resonate feed key and shares it with you
- In LiveRamp, select Resonate as your Destination account and paste the feed key into the LiveRamp feed field of the configuration form
- Distribute your file to Resonate
- After 7 days of processing time, Resonate publishes the file to your account





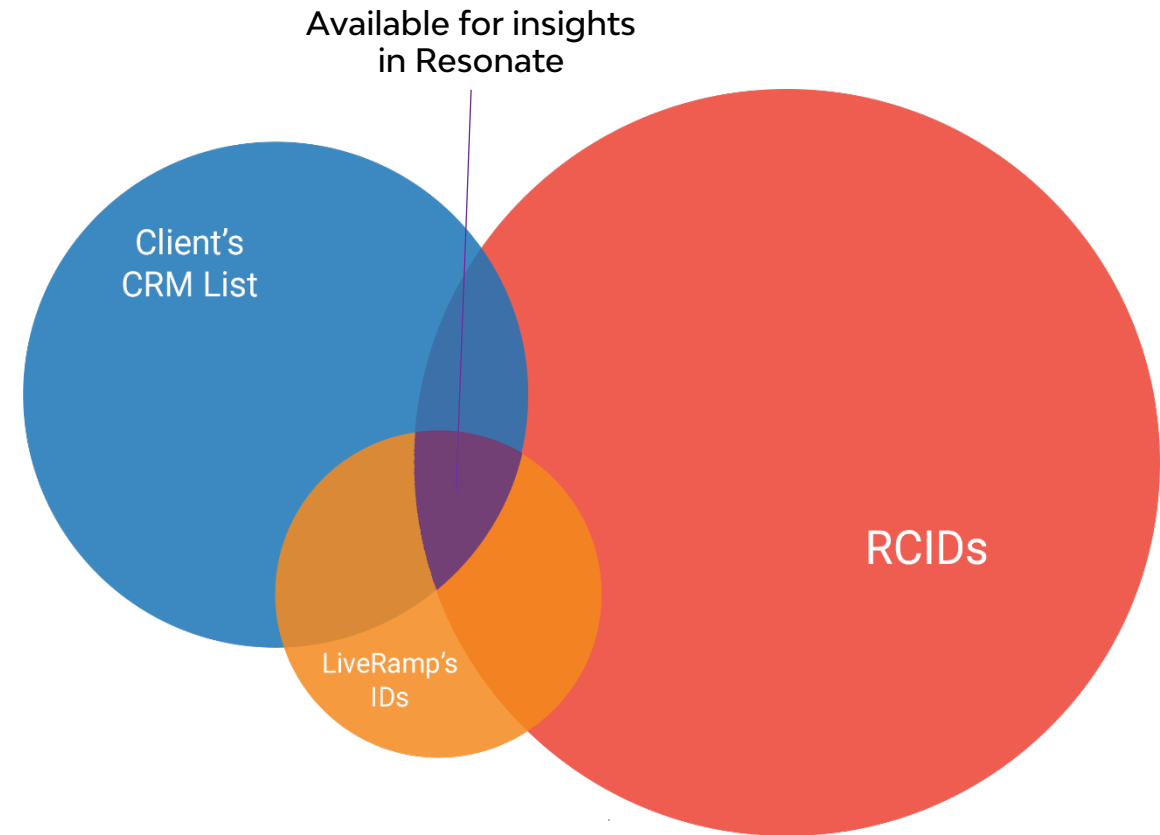
Understanding Match Rates

Individual Level vs. Household Level

- Resonate provides individual level insights
- LiveRamp will include household level data where necessary
- Individual levels insights matched with household level data doesn't always yield a favorable outcome
- Resonate's data is only as good as LiveRamp tells us
- Clients who know specific info (e.g. demographics or political party affiliation) of their list should not expect Resonate attributes to match 100%
 - Ex 1. Men's grooming product company has CRM list of Males but get back Demo insights on 50-50% Male/Female
 - Ex 2. File of Democrats can come back with Republicans & Independents

Understanding the Match Rate

- Two-step matching process
 1. Matching offline customer file to online LiveRamp IDs
 2. Matching online LiveRamp IDs to online Resonate IDs
- Clients should expect scale loss at each step
 - Client's CRM list: **1M records**
 - LiveRamp's matched files at Household level: **40% - 400K records**
 - Devices available to drive insights: Overlap of matched files and Resonate's ID: **10-20% - 80K devices**
- **That's why the minimum is 100,000 is number of records needed for insights**



Data Validity Duration

- Expect data to be valid for 90 days
 - It might last longer but Resonate is not responsible for its accuracy beyond 90 days
- RCIDs begin degrading after 90 days and become less insightful
 - Because cookies age out after 90 days
- We recommend reloading files as new segments monthly– Our pricing and packaging reflects this





Customer Best Practices

Customer Best Practices

- Follow formatting and segmenting requirements to ensure success of onboarding
- Data Quality: The better the data in your CRM file, the better the match rate
 - For best results, include name and mailing address (both required), and phone number
 - If you have hashed email addresses, MAIDs, or IP Addresses we recommend our Direct Data Onboarding solution.



File Formatting Rules

Minimum File Size

- The minimum file size is 100K! No Exceptions!
 - Smaller files will not generate insights
- If you have a larger file, and are placing records into meaningful segments, each segment must be at least 100K.
 - Use segments for however you bucket your customers
 - Ex. Segments of High Spenders, Medium Spenders, Low Spenders, Lapsed Customer, VIP customers
 - Each segment must be at least 100K records to get insights
- Create ranges for your data
 - Ensure you have enough records in each bucket so that you can build an Audience with them in Resonate

Important File Formatting Rules

- The data in your CRM file needs to be formatted correctly.
 - Incorrect formatting delays the onboarding project.
- LiveRamp notifies you and Resonate when the formatting is incorrect.
 - Resonate CS contacts you to discuss correct formatting.
- Provide Resonate with a data dictionary that describes each attribute
 - Helps us understand what you are onboarding
 - We can recommend user-friendly name and suggest changes
 - We can create appropriate Collections in your Resonate Account
 - Complicates cases will require PS work

Important File Formatting Rules

File Names

- LiveRamp_Resonate_<Description>_<MMDDYYYY>.csv.
- LiveRamp cannot accept Microsoft Excel (".xls" or ".xlsx") files, so please use .csv.
- Avoid special characters and spaces in the file name
- Ex: LiveRamp_Resonate_NewVoters_02182016.csv
- Minimum segment size is 100,000 users to have sufficient sample for analysis through LiveRamp.
- 500MB max file size – above that, we use the SFTP solution

Important File Formatting Rules

Segment Headers

- [Download sample spreadsheet](#)
- Must contain column headers, in the order outlined in our Knowledge Base [here](#).
 - The order of data impacts Resonate's Taxonomy and how values are listed in the platform
 - Leave fields blank where you cannot supply information
- Use descriptive names for segments, **WITHOUT spaces**
 - Gender, Age_Range, Political_Party, Car_Make
- To segment on State, include a second State field called "State_Segment"
- Limited to 100 columns

Possible Segments

Binary Segments

- If user is in the segment, enter **1 for true**. If not, enter **0 for false**.
- Devices matched to John Doe will be contained in the “Auto Lovers” and “New Parent” segments.

Customer ID	First_Name	Last_Name	Street_Address_1	Street_Address_2	City	State	Zip_Code	Zip_Plus_4	Email1	Email2	Email3	Auto_lovers	Executives	New_Parents	Segment4	Segment5
12345	John	Doe	111 Main St	Apt 8	San Francisco	CA	94107	2223	john@gmail.com			1		1		
67890	Jane	Doe	456 Main St	Apt 10	New York	NY	94125	4456	jane@gmail.com				1			

Possible Segments

Enumerated Segments

- Will map gender "M" records to one audience segment and gender "F" records to another audience segment.
- "Toyota" and "Honda" are other examples of possible segments.
- We can then target based on certain criteria (e.g. Target female Toyota owners). When dealing with a wide range of numbers, such as spend or donation level, group them into max. 20 segments.

Customer ID	First_Name	Last_Name	Street_Address_1	Street_Address_2	City	State	Zip_Code	Zip_Plus_4	Email1	Email2	Email3	Gender	Car_Make	Donation_Level
12345	John	Doe	111 Main St	Apt 8	San Francisco	CA	94107	2223	john@gmail.com			M	Toyota	<100
67890	Jane	Doe	456 Main St	Apt 10	New York	NY	94125	4456	jane@gmail.com			F	Honda	100-500

Processing Times

- End-to-end process can take up to 14 days
 - LiveRamp's SLA is 7 business days to onboard and 7 business days to distribute data
 - Typically, onboarding is 2 or 3 days and distribution is another 2 or 3 days





Appendix

Excel File Format

- Each segments in the file is limited to containing 20 unique groupings
 - Significant overages will be at risk of not being displayed in LiveRamp
 - Resonate cannot store and display an unlimited number of attributes or attribute values

Segments	Segment1	Loyalty_Status	Car_Model
Unique Groupings	True False	Bronze Silver Gold Platinum	Accord Civic CR-V Fit HR-V Odyssey UR-V

Max. 20 groupings

Excel File Format

Max. 100 columns

First_Name	Last_Name	Street_Addr	Steet_Adre	State	Zip_Code	Zip_Plus_4	Email1	Age	Gender	Ethnicity	Religion	Car
Abbey	Bello	8816 Adobe	Mission Viej	VA	20190	2805	sample9@gr	35-44	F	English/Wel	Protestant	Civic
Abbey	Hunter	5936 Pellbur	Corona	VA	20190	2805	sample10@f	35-44	F	Hispanic	Protestant	Civic
Abbie	Lloyds	1719 Messin	Santa Rosa	VA	20190	2805	sample3@y	35-44	F	English/Wel	Protestant	Civic
Abbie	Fose	2613 Silverw	lone	VA	20190	2805	sample4@y	25-34	F	Asian	Catholic	Civic
Abby	Charfauros	2850 Ferrocc	Healdsburg	VA	20190	2805	sample6@y	35-44	F	Hispanic	Catholic	Accord
Abby	Red	3209 Locust	Menifee	VA	20190	2805	sample8@y	65+	F	Hispanic	Catholic	Accord
Abby	Christenson	4042 Bonita	Murrieta	VA	20190	2805	sample10@	25-34	F	English/Wel	Catholic	Accord
Abigail	Brown	3725 Lemon	Rocklin	VA	20190	2805	sample1@y	55-64	F	Hispanic	Catholic	Accord
Abigail	Struckerson	18043 Gamt	Covina	VA	20190	2805	sample2@y	35-44	F	Italian	Protestant	Accord
Abigail	Chizek	7595 Adrian	Willits	VA	20190	2805	sample9@y	18-24	F	Hispanic	Catholic	Accord
Aileen	Carolson	762 Universi	Chula Vista	VA	20190	2805	sample4@gr	35-44	F	English/Wel	Catholic	Accord
Alberta	Green	2314 Via Cla	Windsor	VA	20190	2805	sample5@y	35-44	F	French	Catholic	Accord
Alicia	Caraganian	6033 Dunrob	La Crescenta	VA	20190	2805	sample3@gr	35-44	F	English/Wel	Catholic	Accord
Ashley	Bocorra	64144 Hume	Dublin	VA	20190	2805	sample8@gr	25-34	F	English/Wel	Protestant	CRV
Brittania	Hanson	1100 Garder	Corona	VA	20190	2805	sample1@ar	35-44	F	Irish	Protestant	CRV
Brooke	Black	13000 Pepp	Menifee	VA	20190	2805	sample7@gr	35-44	F	English/Wel	Catholic	CRV
Cheryl	Casosa	33302 Black	Victorville	VA	20190	2805	sample5@gr	55-64	F	English/Wel	Catholic	CRV
Emanuela	Harristy	5604 Via Bo	Escondido	VA	20190	2805	sample7@y	55-64	F	Hispanic	Catholic	CRV
Heather	Bruglemans	8594 Villa La	Saugus	VA	20190	2805	sample8@ar	45-54	F	English/Wel	Protestant	CRV
Kelley	White	36394 Ruth	Walnut Cree	VA	20190	2805	sample4@ar	35-44	F	English/Wel	Protestant	CRV
Kimberly	Tan	4082 Albatrc	Shingle Sprir	VA	20190	2805	sample2@ar	45-54	F	English/Wel	Protestant	Fit
Lisa	Duvalan	3101 W Tere	Rancho Cord	VA	20190	2805	sample9@ar	55-64	F	Hispanic	Protestant	Fit
Maria	Sims	25 Flagstone	Laguna Nigu	VA	20190	2805	sample6@ar	25-34	F	English/Wel	Protestant	Fit
Megan	Margotts	460 2nd St V	Moreno Vall	VA	20190	2805	sample7@ar	35-44	F	English/Wel	Protestant	Fit
Naomi	Sisco	27601 Stallic	El Cajon	VA	20190	2805	sample5@ar	25-34	F	English/Wel	Protestant	Fit
Natasha	Clammes	608 1/2 Beg	Santa Rosa	VA	20190	2805	sample2@gr	35-44	F	Irish	Catholic	Fit
Rebekah	Castra	146 Spicer Li	El Cajon	VA	20190	2805	sample6@gr	35-44	F	English/Wel	Catholic	Odyssey
Renee	Blue	2304 W Paln	Escondido	VA	20190	2805	sample3@ar	55-64	F	English/Wel	Protestant	Odyssey
Robi	Calcagno	30912 Calle	Truckee	VA	20190	2805	sample1@gr	35-44	F	English/Wel	Catholic	Pilot

Min. 100K records

Segment

Car
Civic
Civic
Civic
Civic
Accord
Accord
Accord
Accord
Accord
Accord
Accord
Accord
Accord
CRV
CRV
CRV
CRV
CRV
CRV
CRV
Fit
Fit
Fit
Fit
Fit
Fit
Odyssey
Odyssey
Pilot

Max. 20 groupings
In each grouping,
min. 100K records

If more than 20
groupings, bucket
Civic vs Sedan