

# 5 QUESTIONS TO EVALUATE YOUR CUSTOMER IDENTITY PROVIDERS



**Prior to engaging any identity provider, a marketer should clarify two critical items below:**

## **The desired use cases and goals (i.e. What does success look like?)**

Provide the prospective solution provider with a description of the use-case(s) upfront so that buyers and sellers are aligned. Here are some examples of use cases:

- Onboard offline customer list and reach those individuals across screens
- Retarget site visitors
- Target devices within 5 miles of my retail locations

## **Definition of key terms, such as “uniques”, “identity”, etc.**

Definitions and terms can vary across parties, therefore, it's best to understand how the buyer and seller are defining these terms to make sure that all parties are on the same page. For instance:

- Unique households
- Unique cookies
- Unique device associations

## **Here are five questions to effectively assess potential partners:**

### **1. HOW ARE CONSUMER PROFILES ESTABLISHED, MAINTAINED, AND PROTECTED?**

Marketers' use cases may require different types of consumer connections to different channels (e.g. message all mobile devices within 2 miles of a specific location vs. target a specific customer segment and track online + offline conversions).

- Device-based: Seed of the profile is a device/cookie and connections are based on matching device-to-device
- Consumer-based: Seed of the profile is anonymized name, address, etc. of a verified consumer and devices are matched to each consumer

### **2. WHAT IS THE DEPTH AND BREADTH OF THE CONSUMER DATA?**

It is important to align the marketer's desired target audience with vendor capabilities to identify and target that audience (e.g. if a marketer wants to target consumers that are pet owners, it is important to discuss how a supplier identifies pet owners). Some parameters of the depth and breadth of consumer data include, but not limited to:

- Broadcast & digital content consumption
- Online / mobile content consumption
- Location and proximity intelligence
- Cross-device behaviors

Note: It is also critical to make sure that the data collection and your provider's processes are compliant with all privacy regulations and self-regulation guidelines.

### **3. HOW ARE DATA POINTS (ONLINE DATA, OFFLINE DATA, AND DEVICES) MATCHED TO A CONSUMER PROFILE?**

Marketers' use cases may require different levels of accuracy and scale, and may apply to different channels and/or devices.

- Probabilistic or modeled approach?
- Deterministic or directly observed approach?
- How does accuracy vary based on channels (online / offline), devices, and data used?

### **4. HOW DO YOU MAINTAIN A CONNECTION TO CONSUMERS OVER TIME AND ESTABLISH A RELATIONSHIP?**

- How long can you maintain a connection to an individual consumer?
- What happens if a consumer clears cookies or gets a new device?

### **5. HOW DO YOU MEASURE AND EVALUATE CAMPAIGN PERFORMANCE?**

It is critical to ensure buyers and sellers are aligned on how campaign performance will be evaluated so the solution drives the desired outcome(s).

- Brand lift
- Ad engagement (CTR, vCR, etc.)
- Web site visit
- Store visit
- Conversions / sales
  - Same device attribution based on online cookies (click-based or view-based conversions)
  - Cross-device conversions
  - Online and offline conversions

#### **Related Resources:**

- [IAB Mobile Identity Guide for Marketers](#)
- [IAB Digital Attribution Primer 2.0](#)
- [IAB Multi-Touch Attribution \(MTA\) Implementation and Evaluation Primer](#)
- [Demystifying Identifiers and Understanding Their Critical Roles in Advertising](#)