

Netrics Success Story

Membership Organization Links with Partner Databases

Netrics Real-World Matching Platform™ enabled a large, national B2B membership organization to match its 100,000+ membership list with affiliate customer lists of 20,000 to 500,000 records each, identifying 95% more matches than using “exact” matching software

The Client

Client "M" is a large, national B2B membership organization. M provides a variety of benefits to members, including discounts when they do business with M's affiliate organizations.

Situation Analysis

Many of M's commercial members were not receiving appropriate negotiated discounts when they did business with M's affiliates because the affiliates could not identify which of their customers were members of M.

M had originally considered supplying its members with “discount cards” to prove eligibility for discounts, but this was deemed impractical. Its member organizations typically had dozens if not hundreds of employees who would need cards, the cards might not be presented to the affiliates consistently, and affiliate procedures would have to be changed in the field, at point of sale, with appropriate field staff training to effect the discounts. A “discount card” solution was ruled out.

Instead, M wanted to compare its membership list with the customer lists of its affiliates and record appropriate discount levels in the affiliate's billing databases. This centralized solution would enable uniform application of eligible discounts, would permit application of discounts at the corporate billing level, would eliminate the need for changes in in-field training and procedures, and could be periodically updated as members joined and quit.

The Challenge

M's initial attempt to compare its membership lists to those of its affiliates yielded very few matches. Upon investigation, it became clear that misspellings, variations in business names, and inconsistencies in addresses and phone numbers left most legitimate matches undetected. Adding to the complexity of the problem, many members used one business name for the services part of their business under which they were members of M, but used a different business name for the products segment of their business that actually made purchases from M's affiliates. In the end, less than 5% of the legitimate matches could be detected by exact matching methods.

Comparing M's 100,000+ member database to affiliate databases ranging from 20,000 to 500,000 records was too large a task to take on manually, but the comparison demanded an intelligent, error-tolerant way to identify matches.

The Netrics Solution

M turned to Netrics for a data analysis that modeled human similarity perception, and that reflected the human decision making process for matching records.

The Netrics Data Services team performed a one-off "A/B Overlap" analysis of M's member database against its affiliate databases. This analysis identified every record in M's database that had a suitably close match in an affiliate database.

The Netrics Matching Platform was used to overcome spelling, typing, and data entry errors, and to analyze missing fields and mis-fielded data to identify legitimate, justifiable matches.

Netrics' deliverable to M was a report of matching record pairs, one from M's database and one from an affiliate database, ranked by closeness of match. After a brief manual review, this report was used to flag M's members in each affiliate's customer database.

As an added benefit, Netrics was able to notify M and its affiliates that approximately 8% of the records in their respective databases were internal duplicates. That is, a single client was represented by multiple records in an affiliate database or in M's member database.

Successful Outcome

Because of Netrics' Matching Engine™, many more legitimate matches were detected than before. The accuracy of the Decision Engine™ meant that the need for human review was minimized.

Ultimately, the Netrics analysis enabled M to deliver on its promise to its members, improving M's service level, member satisfaction, and member retention.