



CASE STUDY

Single customer view

How one bank achieved a real-time Single Customer View with Agile Solutions

It's a competitive digital landscape for the banking sector: to retain customers and attract new ones, you need to be able to offer excellent digital experiences. Here's how Agile Solutions helped one financial organisation take a customer-based view to improve every customer journey.

The bank's data goal:

Improving customer experience with data-driven digital journeys

With over 7.5 million personal customers and 850,000 small business accounts, the bank wanted to improve the experience of every customer, by making more varied digital journeys available to customers and providing better information to staff. They wanted customers to be able to manage their own data to keep records up to date and accurate, in order to personalise experiences and enable teams to see a complete picture of each customer they dealt with. Being able to access accurate data in real-time was critical to making these initiatives a success.

The challenge:

A product, not people, led approach to customer data

The bank had traditionally taken a product-centric view of its customers, which made it difficult to see each customer as a complete entity: the products

they have, the solutions they might need, even their financial health or simple contact details. They needed to switch to a customer-centric vantage point to get a better understanding of the customer life cycle, customer journey, and product alignment. Customer Data updates also needed to be synchronised across multiple sources, making a single version of the truth available.

The Agile Solution: Streaming a single customer view in real-time

Agile Solutions Data Platforms & Engineering (DPE) function designed and built a real-time Single Customer View solution, with associated data services. Data streaming pipelines using StreamSets, Kafka and Mongo DB were used to stream real time customer and product data to a single customer view.

The Result: A single customer view in under 7 months

Customers can now manage their own data, including contact details, permissions and preferences, and the bank can have confidence that these updates will be synchronised across the business. This, in turn, provides more data in real time to customer service agents, allowing more tailored, personalised experiences across every customer journey – as well as better opportunities to cross-sell.

Do you need reliable real time data to drive your digital journeys and improve customer experience? Our team can advise you on the best approach for your organisation.

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