

01

CLEAN ROOMS

Your Customers Aren't Hiding. Your Signals Are.

They live beyond your walls. You're missing them.

THE PROBLEM

First-party data hits a ceiling.

Same audiences.
Same results.

Growth stalls at your own boundaries.

OUR SOLUTION

Match partner audiences.

No raw data shared.

Governed. Scalable.
Data stays in place.

Insight without moving a record.

THE IMPACT

New segments. New reach. New signals.

Growth moves past first-party limits.

Addressable market expands.

YOUR DATA + CLEAN ROOM + PARTNER SIGNAL = NEW GROWTH

Let's unlock new signals. Unlock new growth.

You have the foundation.
We help you see beyond it.
Governed and built to scale.

01 Readiness

Pick the use cases. Vet partners.
Confirm governance.

02 Enable

Stand up clean rooms.
Onboard data.
Activate a first cohort.

03 Prove

Launch use case.
Measure overlap.
Improve the signal.

04 Scale + Operate

Add partners. Expand use cases.
Set the operating rhythm.

LET'S FIND YOUR NEXT AUDIENCE.

CONNECT WITH OUR TEAM



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02

DUAL ZONE

Collected. Analyzed. Never Activated.

Your lake is full. Your marketing pipeline isn't. That gap is the tax.

THE PROBLEM

Data accumulates.
Activation doesn't.

Insights exist. Action
doesn't follow.

Growth pays the price.

OUR SOLUTION

Analyze in the lake.
Activate from Data 360.

Warehouse stays the
source of truth.

No rebuild. No second
copy of the truth.

THE IMPACT

Faster time to
activation.

Simpler architecture.

Data investment starts
paying back.

YOUR LAKE + DATA 360 + MARKETING CHANNELS = ACTIVATION

Let's activate your lake. Accelerate your growth.

You made the investment. It should work harder. We connect insight to action without a rebuild.

01 Diagnose

Find the bottlenecks. Map the lag. Rank use cases by impact.

02 Pilot

Pick fast wins. Test the path. Show the speed gain.

03 Connect + Measure

Stand up lake-to-activation. Launch campaigns. Measure lift.

04 Scale + Operate

Align teams. Set the cadence. Expand to new use cases.

LET'S ACTIVATE WITHOUT A REBUILD.

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03

HEADLESS MARKETING

Create Once. Publish Everywhere.

Your content is trapped in the tool that made it.
Every new channel starts over.

THE PROBLEM

Content is built inside one platform.

You only reach the channels it supports.

A new channel means rebuild, not reuse.

OUR SOLUTION

Separate content from delivery.

Create once.
Manage centrally.

Publish to web, app, email, signage, agents.

THE IMPACT

New channels in weeks, not quarters.

One source of truth on every surface.

Ready for channels that don't exist yet.

ONE CONTENT LAYER + ANY CHANNEL + AGENT-READY = SPEED TO MARKET

Let's free the content.

You already produce enough content. It just can't reach far enough. We separate what you say from where you say it.

01 Assess

Find where content is trapped and what each new surface costs.

02 Separate

Move content into a central layer with open delivery.

03 Publish

Push to live channels with Data 360 driving personalization.

04 Scale + Operate

Add surfaces, including agents, without rebuilding the core.

LET'S BUILD ONCE AND GO EVERYWHERE.

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04

CONVERSATION READY

Prepared Before the Conversation Starts.

Advisors prep too long.
Conversations stay shallow.
Wallets stay closed.

THE PROBLEM

Client data exists, but it's scattered.

Advisors can't find it fast enough.

Conversations lack context.

Opportunities slip.

OUR SOLUTION

One client view with signals and next-best actions.

One screen, ready before the conversation.

Desktop.
Mobile. Current.

THE IMPACT

Advisors spend time on clients, not prep.

Deeper conversations.
Stronger relationships.

More engagement.
More opportunity.

YOUR DATA + ONE ADVISOR SCREEN = RELATIONSHIP GROWTH

Let's make your conversations count.

Your data exists.
It isn't reaching the frontline.
We close the gap,
context to conversation.

01 Stand Up
Deploy the advisor view in your environment. Connect core data.

02 Enhance
Layer signals, dashboards and next-best actions onto existing views.

03 Adopt
Roll out by advisor segment. Coach to the new prep habit.

04 Scale + Operate
Extend to new teams. Refine the signals. Keep the rhythm.

LET'S GET YOUR ADVISORS READY.

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05

GROWTH SIGNALS

See the Full Picture. Win the Full Relationship.

You see the products they hold with you.
The rest of the relationship stays invisible.

THE PROBLEM

Feedback sits in dashboards.
People don't act.

First-party data shows a slice, not the customer.

Churn and wallet share move before you see them.

OUR SOLUTION

Unify feedback with market, spend and life-stage signals.

Score risk and opportunity in Data 360.

Trigger the next action, not the next report.

THE IMPACT

Earlier saves.
Sharper targeting.

Cross-sell built on the whole relationship.

Signals become actions.

FEEDBACK + CONVERGE™ SIGNALS + DATA 360 = SAVES

Let's turn signals into saves.

Feedback is everywhere. Action isn't. We close the loop, from signal to save to next sale.

01 Baseline

Analyze feedback history. Map churn and opportunity patterns.

02 Enrich

Add partner and market signals through clean rooms. Resolve identity in Data 360.

03 Activate

Score risk and opportunity. Trigger recovery and next-best offers.

04 Scale + Operate

Extend across segments. Monitor outcomes. Refine.

LET'S CLOSE THE LOOP.

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06

PORTFOLIO + PLATFORM

Multiple Orgs. One Company. Unify Before You Migrate.

Every brand bought its own.
Nobody owns the whole. The bill keeps growing.

THE PROBLEM

Acquisitions leave
disconnected orgs.

Duplicate process.
Duplicate license.
Duplicate customer.

Nobody can say who
the customer is.

OUR SOLUTION

Assess duplication
across environments.

Harmonize process.
Set one platform
strategy.

Unify customer context
in Data 360 before any
migration.

THE IMPACT

One customer view
across every brand.

One platform roadmap
instead of six.

Consolidate on your
timeline.

**SCATTERED ORGS + DUPLICATION ASSESSMENT + UNIFIED CONTEXT =
PLATFORM STRATEGY**

Let's see the whole portfolio.

You own the instances.
You don't own a view across them.
We build that view before you migrate anything.

01 Assess

Inventory orgs, process and licenses. Quantify the duplication.

02 Unify Context

Resolve customer identity across instances in Data 360.

03 Harmonize + Decide

Agree common process. Decide what consolidates, stays or retires.

04 Scale + Operate

Migrate in sequence. Keep one customer view throughout.

LET'S UNIFY BEFORE WE MIGRATE.

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07

AGENT ORCHESTRATION

Skip the Silos. Ship Agents That Agree.

Every team built one. None of them share a customer.

THE PROBLEM

Every team ships its own agent.

Each carries its own context.

They contradict each other in front of the customer.

OUR SOLUTION

One shared context and semantic layer in Data 360.

Shared definitions.
Shared customer.
Shared truth.

Governance on what each can see and do.

THE IMPACT

Agents that hand off instead of collide.

Add agents with guardrails in place.

A consistent answer across channels.

**AGENT SPRAWL + SHARED CONTEXT LAYER + GOVERNANCE =
AGENTS THAT AGREE**

Let's get your agents agreeing.

The agents are not the problem.
The context under them is.
We build the shared layer.

01 Map
Inventory your agents, its data sources and its overlaps.

02 Shared Context
Stand up the Data 360 semantic layer and common definitions.

03 Govern
Set what each agent can see, do and escalate.

04 Scale + Operate
Add agents to a pattern rather than to a pile.

LET'S GET YOUR AGENTS AGREEING.

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08

SERVICE CONTINUITY

Four Transfers. One Customer. Zero Memory.

They already told you. Twice. The next person still asks.

THE PROBLEM

Each channel holds a fragment of the customer.

Every handoff starts over.

Frustration builds. Satisfaction drops.

OUR SOLUTION

One customer profile across channels in Data 360.

Agents see full history, not a summary.

Open issues travel with the customer.

THE IMPACT

More resolution on first contact.

Self-service customers accept.

Service becomes a retention lever.

**FRAGMENTED CHANNELS + ONE PROFILE + AGENTFORCE =
ONE MEMORY**

Let's connect the channels. Keep the loyalty.

Your customers are consistent. Your channels are not. We give them one memory.

01 Journey Diagnostic

Trace real cases across channels. Count repeats and transfers.

02 Resolve Identity

Build one resolved profile in Data 360 across every channel.

03 Carry the Thread

Make history, entitlement and open issues travel with the customer.

04 Scale + Operate

Extend across channels. Measure first-contact resolution.

LET'S STOP THE REPEATING.

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