



TARGUSinfo<sup>®</sup>

**BEST PRACTICES IN  
NAME AND ADDRESS CAPTURE  
AT THE POINT OF SALE**

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www.TARGUSinfo.com*



## *Introduction*

Even before the advent of CRM, retailers have sought new and better methods of learning who their customers are and how to build better, more profitable relationships. For over a decade, TARGUSinfo has provided data solutions that meet these critical needs.

Starting with a 10-digit phone number or name and ZIP code, TARGUSinfo supplies the most current and accurate customer contact information in real time or in batch. This document shares many of the best practices we have observed — and participated in — to ensure a high level of compliance of customers sharing their home phone number at the point of sale.

## *Match Your Data Capture to Your Strategies*

### *Identify Your Objectives*

Before launching a customer-data-capture initiative, retailers should have a clear idea of why they are capturing data and how they plan to use it.

For example, many of our customers have come to us with the following objectives:

- Create a customer database that effectively tracks customers' purchasing history and behavior
- Develop a faster and more precise solution that captures contact information for loyalty programs
- Build an exhaustive database in order to remarket to customers
- Identify a simple and efficient way to collect new customer information

All of these objectives can be met by capturing a phone number at the point of sale. By capturing a number, a consumer name and address can be easily linked by using one of these two tactics: 1) back-office reverse phone append (RPA) or 2) real-time point-of sale identification. TARGUSinfo provides both of these services.

Back-office RPA is a static capture of a customer phone number at the point of sale. A company can then use this phone number to for the future append of name and address.

Real-time point of sale allows retailers to instantly connect a phone number with a name and address. The information is populated on a store agent's screen eliminating transcription errors and speeding up the process. This allows retailers to enroll customers in their loyalty plans in sub-second speed, improves data accuracy, reduces lines at the register and reduces expenses.

## *Make Success Easy for Your Store Associates*

Once your customer-data-capture solution is in place, get your store associates up to speed. Customer compliance and store-associate compliance are very tightly linked. If your customers do not respond positively to a store associate's request for a phone number, then the store associate will likely stop asking customers for their data. In some cases, store associates will forge a number, using one that's a duplicate or invalid.

We have found several key attributes to ensuring store-associate compliance:

1. Training — Make sure that your associates have been adequately trained on your phone-data-capture process. They should be comfortable with what to say and how to enter data prior to going live with your phone-capture process.
2. Providing adequate signage — Information regarding your purpose for asking customers for their telephone number should be posted and easily visible. Recommended language is included in “Examples of Effective Signage,” on p. 4.
3. Scripting — Make the process of asking for home phone number as easy as possible. Prepare a script for all sales associates, ensuring that you capture the right information. In addition, they should be trained on how to appropriately respond to frequently asked questions (FAQs). See “Recommended FAQs,” on p. 5.
4. Communicating clear benefits to your customer — What incentive are you giving to your customers to provide their phone numbers? Will you send them coupons? Will they be the first to hear about sales or new merchandise? Will the phone number replace the completion of a form to join a loyalty program?
5. Handling new questions — You cannot prepare store associates for every question they may be asked. Designate a process and person to handle unusual questions, document them and follow up with answers for your customer.
6. Ensuring data privacy — Post a clear statement to customers that their data will not be used for any other purpose than your stated goal.



## *Examples of Effective Signage*

*May we have your phone number?*

It will enable us to provide you with a higher level of service. You can receive valuable savings coupons, advance notice of special events and much more.

Please understand that we will keep your number in strict confidence. It is for our use only. We will not sell or use your number for any telemarketing purposes.

*Thank you!*

*Large Sports Store Chain*

*We may ask for your home telephone number. By giving us this information at the time of your purchase, we learn more about the items you like the most ... and look for ways to serve you better. Your number will only be used to track your purchases or for internal measurements.*

*If you prefer not to volunteer this information, please tell the cashier. If at any time you wish to add, remove or change your name or address in our database, call 1-800-TOY-STORE (1-800-555-1212). Thank you for being a valued customer*

**Joining Our Loyalty Program:**

If you decide to sign up and take advantage of the special benefits provided to members of our Loyalty Program, you will be asked for your home phone number during the sign-up process. Your phone number enables us to quickly and accurately capture your name and address. We value our customer and their privacy — this information will not be sold or shared with other companies. Thank you!

## Recommended FAQ

Listed below are several questions that our customers have encountered at the point of sale, along with possible answers. *We do strongly suggest developing a customized set of questions specific to your business.*

**1. Why are you asking me for my phone number?**

Answer (real-time): We may be able to speed up your loyalty-card sign-up by using your phone number rather than have you fill out a form.

Answer (batch): We use this to mail you information on sales, new merchandise and special events.

**2. How are you able to get my address using my phone number?**

Answer: We have access to a database that links names and addresses to phone numbers.

**3. Will you use my phone number to call me for marketing purposes?**

Answer: Typically, no. We will most often communicate by mail. Occasionally, we may call customers to make them aware of special members-only events.

**4. Will you sell or share my information with anyone else?**

Answer: We respect your privacy. We will not sell your information.

**5. Can I give you a wireless-phone number or business-phone number?**

Answer: If you would like to receive future information from us, we would prefer that you give us your home phone number.

**6. Do I have to give you my phone number?**

Answer: No you do not. If you would still like to join our loyalty program, you can fill out this form.

**8. I have given you my phone number in the past and still never received any coupons, why?**

Answer: We do our best to keep in touch with all customers. It may be that you gave us a business or wireless number. We can only mail to customers that share a home-phone number. You can also visit our Web site and enter your contact information.



## *Customer Compliance*

### **What percentage of customers provide their phone numbers?**

We've found that most retailers receive 75% to 95% of customer phone numbers when they ask. Best-in-class retailers ensure that phone-data capture translates to valuable customer data by ensuring that they are asking for home telephone numbers. Some sample compliance rates include:

1. Large Toy Store Chain — 85% of all customers provided telephone numbers, of which 82% were home phone.
2. Large Sporting Goods Chain — 90% of all customers provided telephone numbers, of which 80% were home phone.
3. Clothing Retailer — 86% of all customers provided a telephone number, of which 85% were home phone.
4. Grocery Retailer (loyalty sign-up) — 95% of all customers provided a telephone number, of which 90% were home phone.

## *Summary*

Accurate, current and complete customer information is the lifeblood of retail marketing effectiveness. When executed correctly, retailers have found that the capture of customer data at the point of sale is an easy, efficient and effective process to yield a high quality of actionable information.

To speak to one of our retail experts, visit us at [www.TARGUSinfo.com](http://www.TARGUSinfo.com) or call 800.6.TARGUS (800.682.7487)

## *About TARGUSinfo*

TARGUSinfo On-Demand Data<sup>SM</sup> services provide unique identification, verification and location solutions that enable retailers, call-center operators, communication service providers, Web-based marketers and others to dramatically increase the quality of their services and the effectiveness of their marketing. A privately held company, TARGUSinfo is headquartered in Vienna, Va.



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