

# Identity Resolution Handbook

Turn fragmented data into consistent & personalized cross-channel experiences



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Marketers have more tools, channels, and data than ever, but most teams are still stuck asking the same questions:

- Who are we talking to?
- What do they care about right now?
- Why are results falling short?

The answer starts with identity. Without a clear, accurate understanding of each customer, even the best-funded campaigns miss their mark. It's not a data volume problem — it's an identity gap.

Every customer interaction creates a signal: browsing a product, opening an email, making a purchase, contacting support. But when those signals live in different systems, teams can't connect them. That disconnect slows everything down. Personalization loses context. Ad dollars are wasted. Testing and optimization stall out.

Campaigns succeed when you know who you're talking to. Without that foundation, segments lose relevance, journeys fall flat, and media budgets underperform.

And it's getting harder. New privacy rules, signal loss, and platform restrictions make identity resolution more urgent, and more complex. Teams need faster feedback loops, better signal accuracy, and a reliable way to unify data across channels.

[Simon Data](#) helps you solve this at the identity level, not just the system level.

# Identity comes first in modern marketing

Marketing strategies are evolving fast. Static lists and siloed systems no longer meet today's demands.

Teams are shifting toward [identity-first marketing](#), building accurate unified customer views to support advanced personalization and omnichannel lifecycle campaigns.

Legacy CDPs weren't designed for this shift. They centralize data but limit activation. Marketers often depend on engineering support, wait on data teams, and get stuck working inside black-box systems.

Simon Data offers a different approach.

Our platform runs directly in your cloud data warehouse, bringing identity matching, enrichment, and activation into one streamlined system. Marketers can manage identity logic themselves, using no-code workflows or SQL when needed. No black boxes. No data silos. Full control.

Unified identity isn't a feature. It's the foundation modern marketing teams rely on to move faster, spend smarter, and scale one-to-one personalization.

# What identity resolution means (and why it's hard)

Identity is constantly evolving. It's not a single field in a database — it's a live, contextual layer shaped by behavior, preferences, and touchpoints.

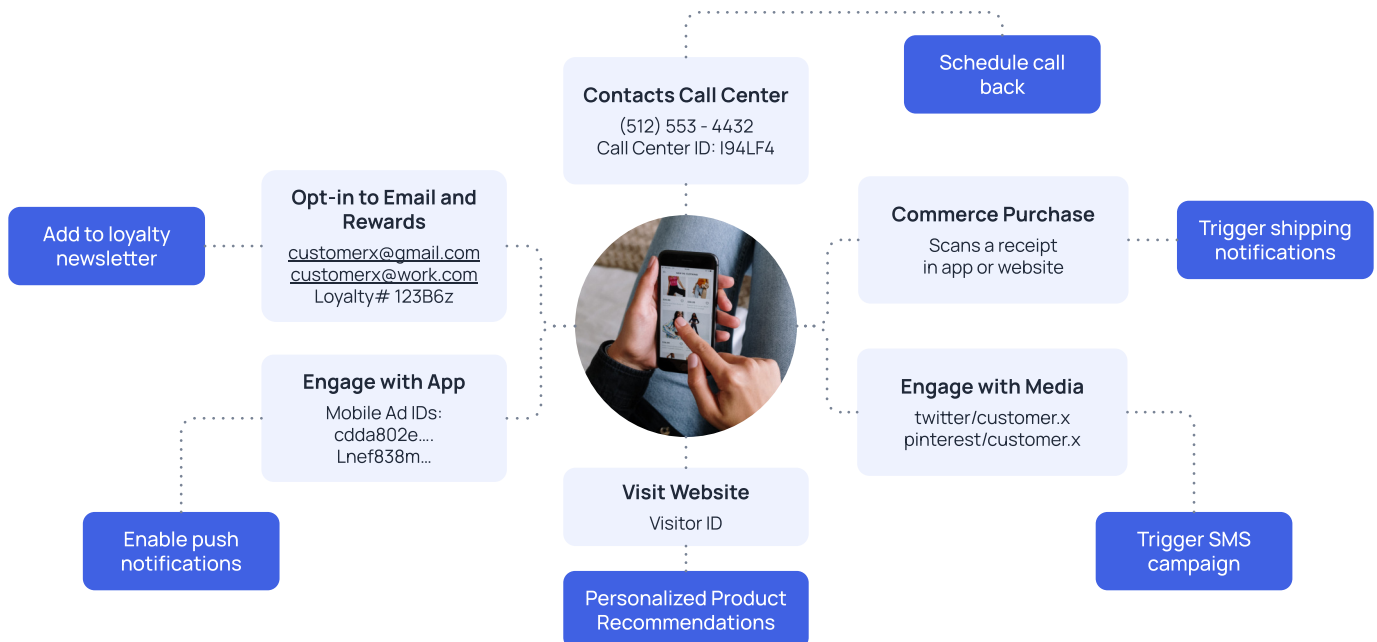
**Strong identity resolution** connects the right signals to the right person, consistently and reliably. That's hard to do when customer activity is fragmented across channels, platforms, and devices.

Common blockers include:

- Anonymous web or app sessions
- Privacy-driven gaps in visibility
- Multiple IDs across systems
- Disconnected martech and adtech stacks

These issues cause blind spots that limit performance across marketing, analytics, CX, and product.

**Simon Data** addresses these challenges with a modular identity system built for real-time use. The platform captures behavioral signals, matches identifiers using configurable rules, and continuously refines the customer profile based on trustworthy data, all with full transparency.





With Simon Data, marketers can:

- ✓ Launch campaigns based on real-time behavior and known preferences
- ✓ Identify high-value audiences with complete profile context
- ✓ Suppress irrelevant messages and reduce customer fatigue
- ✓ Improve attribution by tying actions back to users
- ✓ Drive stronger conversion and retention over time

Identity resolution isn't a one-and-done project. It's a dynamic process that powers every stage of the customer lifecycle and every team that supports it.

# How identity resolution actually works

Marketers want a complete view of every customer. The challenge is how to build it. Identity resolution links fragmented data points to a reliable, up-to-date customer profile.

## What is an identity graph?

An [identity graph](#) connects identifiers like emails, phone numbers, device IDs, and browsing behavior to a persistent customer ID. As people interact with your brand across channels, the graph updates automatically, keeping profiles accurate across email, web, mobile, media, and more.

With this unified view, marketers can launch hyper-personalized campaigns, build more accurate targeting and suppression, and coordinate journeys across the entire lifecycle. Instead of targeting devices or relying on cookies, they can reach real people with precision and relevance.

## Types of identifiers

Customer signals come in many forms. [Effective identity resolution](#) depends on recognizing and linking them reliably. These [identifiers](#) fall into three primary categories:



### First-party identifiers

Captured directly from customer interactions, like email, phone number, login credentials, or purchase data. These are the foundation of privacy-compliant identity resolution.



### Second-party identifiers

Shared by partners, like loyalty programs or co-branded campaign engagement. These add depth without introducing compliance risk.



### Third-party identifiers

Typically hashed or anonymized (e.g., MAIDs, HEMs, cookies). These support media targeting, but are becoming less dependable due to privacy changes.

Effective identity strategies prioritize first-party data and use third-party inputs selectively to expand reach while staying compliant.

## Matching logic: deterministic, probabilistic, and fuzzy

Simon Data's identity system uses a combination of matching types to maximize accuracy and coverage:



### Deterministic

Uses exact matches like email or phone number. Best for logged-in users and cross-channel coordination.



### Probabilistic

Uses behavioral patterns such as device type, IP, and location. Helps connect the dots for users who haven't authenticated.



### Fuzzy

Handles close-but-not-exact matches (e.g., Jane Smith vs. J. Smith). Useful for resolving duplicates or incomplete records.

Simon Data lets marketers control match logic using configurable rules and confidence scoring – no engineering support needed. This balance of precision and flexibility reduces duplicate profiles and improves downstream performance across every channel.

## Identity lifecycle: from unknown to activated

A customer might browse anonymously on mobile, return on desktop to subscribe, then purchase later in a retail app. Without identity resolution, these moments remain disconnected.

Simon Data's [Identity+](#) helps stitch these actions into one evolving profile. Every signal strengthens the view.

With Identity+, marketers can recognize unauthenticated users early by combining session context, behavior, and device signals. This unlocks use cases like:

- Sending emails to customers that abandoned a cart/browse without logging in
- Suppressing known customers from irrelevant paid media campaigns
- Triggering loyalty journeys based on key online behaviors

The result is a faster path to activation, stronger personalization, and higher campaign ROI without rebuilding your tech stack.

# What bad identity costs you (and how to spot the signs)

When identity breaks down, it affects more than just campaigns. You lose reach, relevance, and revenue. The signs aren't always obvious, but the impact adds up quickly.



### Inconsistent customer experiences

A shopper completes a purchase, but still receives a cart abandonment message. Without unified identity, these moments erode trust and drive unsubscribes.



### Wasted ad spend

Low match rates prevent platforms from suppressing existing customers or retargeting effectively. Budgets get burned, and results drop.



### Limited audience reach

If half your site traffic isn't tied to known profiles, lifecycle flows like cart recovery and post-purchase nurturing stall.



### Inaccurate measurement

Without identity stitching, conversions can't be tracked across channels. Teams lose visibility and optimize against the wrong metrics.

Every unresolved session is a missed opportunity. Identity quality directly influences conversion rates, spend efficiency, and customer lifetime value.

### Quick self-check:

- Are more than 25% of sessions still anonymous?
- Do customers receive duplicate or irrelevant messages?
- Is your paid match rate under 60% on Meta or DSPs?
- Are you missing revenue from abandoned carts or browse flows?

If you answered “yes” to any of these, it might be time for a change.

[Request an Identity Assessment](#) →

## How identity resolution drives results

Better identity means better outcomes across every customer touchpoint. With Simon Data, teams improve targeting precision, personalization quality, and channel efficiency.



### Connected customer view

Combine engagement, purchase, and service data into one profile. Make insights accessible across marketing, product, and support.



### Improved reach

[Simon Identity+](#) connects more sessions to real customer profiles, lifting paid performance and lifecycle recovery.



### Higher ROAS across platforms

[Simon Match+](#) amplifies your Meta, Google, and TikTok audiences with HEMs and MAIDs, improving suppression, targeting, and lookalike accuracy without extra spend.



### Smarter segmentation and personalization

Build high-confidence audiences. Deliver messaging that reflects behavior, not guesswork.



### Lower CAC, higher CLV

Suppress recent buyers, prioritize high-propensity leads, and retarget efficiently. Every dollar works harder.



### Stronger lifecycle performance

Resolve more users earlier in the journey. Power smarter journeys including abandonment, winback, upsell, and more.

## Unlocking value beyond marketing

Stronger identity supports better performance across the entire organization.

- **Real-time personalization:** Trigger dynamic experiences based on live behavior and preferences across web, mobile, and email.
- **Suppression and brand safety:** Cut down on fatigue and protect deliverability with consistent customer records.
- **Journey optimization and churn prediction:** Feed your machine learning models accurate data to drive retention, flag risk, and improve timing.
- **Test clarity and standardization:** Align teams on lifecycle definitions, segment logic, and attribution frameworks.
- **Identity-backed experimentation:** Run clean A/B tests and cohort comparisons using trusted customer records.

When identity is unified, every team works from the same source of truth. That alignment leads to faster decisions, better experiences, and stronger growth across the board.

## AI gets better with better identity

AI-driven marketing depends on reliable data. Without accurate identity, models miss the full context, and bias creeps in.

[Simon Data strengthens AI performance](#) by powering enriched, real-time customer profiles that combine identity with real-world signals from structured and unstructured data. This connection makes it possible for you to:

- Uncover patterns and insights about your customer base
- Predict churn and trigger journeys with stronger signals
- Serve recommendations based on complete and accurate history

- Adapt messaging based on intent, channel, and timing
- Launch AI-driven campaigns with full context

With Simon Data, teams get more value from every AI model because the data behind it is clean, complete, and ready to move.

### Use case: Combining third-party demographic data with AI

With [Simon Enrich+](#), you can enhance customer profiles by adding demographic details such as age, marital status, family composition, income, and other attributes relevant to your marketing efforts. This enriched data enables more precise segmentation and personalization. [Simon AI](#) then uses the full profile, including these new demographic insights, to develop smarter marketing strategies, tailored segments, and actionable recommendations based on your goals.

For example, if your goal is to boost sales of high-priced products, [Simon AI](#) can leverage income data alongside product affinity and recent behavior to suggest targeting high-income households with premium promotions, while recommending discounts or value-focused messaging for price-sensitive segments.

## How Simon powers a performance-grade identity foundation

Success in marketing depends on accurate, connected, and complete customer profiles. That begins with how identities are captured, resolved, and maintained.

Simon's identity system runs directly in your cloud data warehouse. You gain full transparency into how profiles are built, with intuitive tools to manage logic, test models, and make updates — no black boxes, engineering tickets, or platform lock-in.

Here's how it works:

### Unified data without duplication

Simon Dedupe consolidates customer records across platforms using normalization, cleansing, and rule-based joins. The platform manages millions of records from dozens of sources and produces a single, accurate

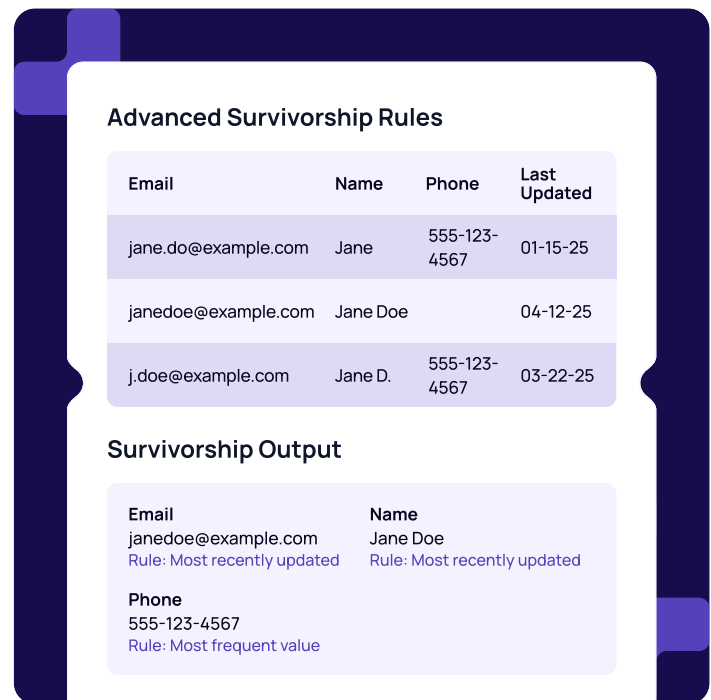
view of the customer.

Built natively in your warehouse, Simon gives you full SQL access, high-speed performance, and avoids creating new data silos.

### Identity modeling with marketer-friendly controls

Once records are unified, Simon applies customizable rules to determine which values are retained. You can prioritize verified fields, select the most recent contact information, or combine details like purchase history, all without writing code.

Versioning, audit trails, and side-by-side model testing let teams optimize confidently. As new use cases emerge, your identity model evolves without disrupting workflows.



The image shows a screenshot of the Simon interface. It features a dark blue header and a light blue sidebar. The main content area is white and contains two sections: 'Advanced Survivorship Rules' and 'Survivorship Output'. The 'Advanced Survivorship Rules' section contains a table with four columns: Email, Name, Phone, and Last Updated. The 'Survivorship Output' section contains a table with two columns: Email and Name. The output table shows the results of the survivorship rules, including the email address, name, and phone number, along with the rule used to select the value.

Email	Name	Phone	Last Updated
jane.doe@example.com	Jane	555-123-4567	01-15-25
janedoe@example.com	Jane Doe		04-12-25
j.doe@example.com	Jane D.	555-123-4567	03-22-25

Email	Name
janedoe@example.com	Jane Doe
Rule: Most recently updated	
Phone	
555-123-4567	
Rule: Most frequent value	

### Secure and scalable from day one

Simon meets enterprise-level security and compliance requirements, including SOC 2 Type II, GDPR readiness, and HIPAA support. Whether you're in finance, healthcare, or retail, your teams can move fast with full confidence in data governance.

[See our security approach →](#)

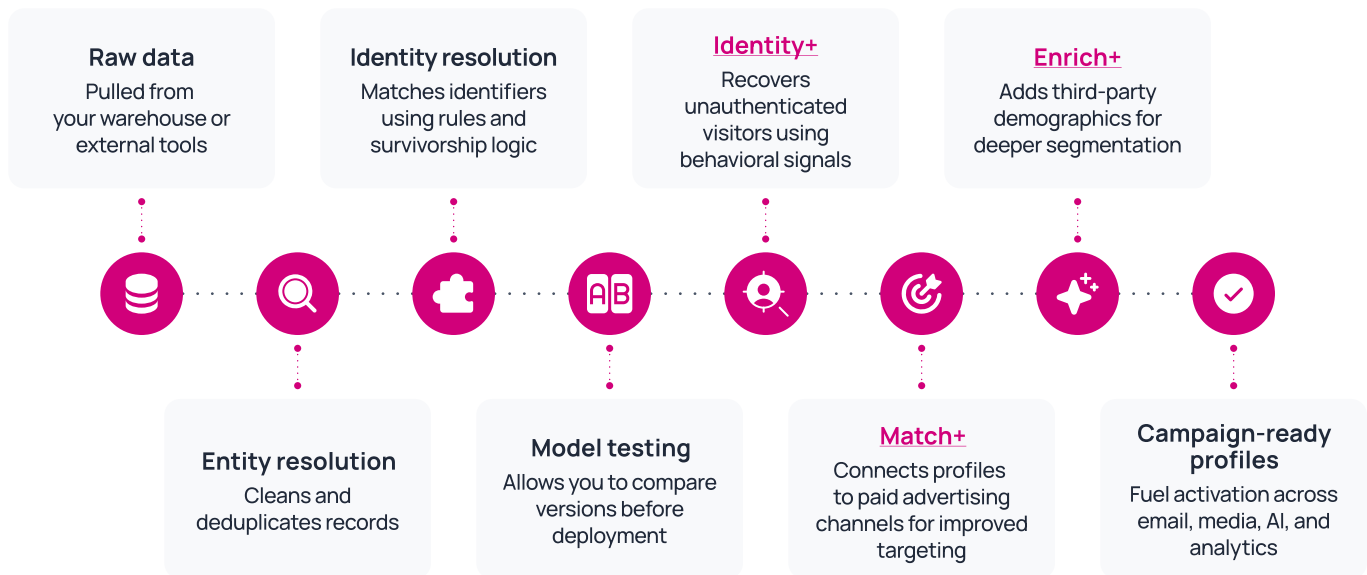
### A complete resolution engine with built-in flexibility

Simon links identifiers using **deterministic, probabilistic, and fuzzy logic**. It supports exact matches like emails and phone numbers, along with contextual signals such as IP addresses, device IDs, and behavioral patterns.

These signals work together to recover more anonymous users and improve campaign reach across owned and paid channels.

## From raw data to activation-ready profiles

**Simon Identity** transforms fragmented records into marketing-ready profiles. Each step adds value:



This layered approach improves fidelity and flexibility, giving you a system that scales with your data and your audience.

## Strengthening segmentation and media ROI

Simon's identity tools help you personalize at scale and reduce spend waste across media and owned channels:

**Identity+**

Resolves unknown traffic using session behavior, device context, and predictive logic. More visitors become reachable earlier in the journey, activating flows like browse recovery and exit-intent messaging. By resolving more users upfront, you boost reach, increase conversion rates, and extract more value from the programs already in place.



👤 Age

❤️ Marital status

👨‍👩‍👧 Family

💰 Income

### Enrich+

Adds attributes like household income, age, gender, and household size. You choose which enrichments to apply and how to use them, enabling deeper segmentation and more relevant messaging without relying on cookies or outdated third-party signals.

MAIDs

Hashed emails

AAID  
cdda802e-ft9c-47  
ad-0794d394c912

#@yahoo

IDFA  
EL7583XD-A637-488C  
B806-42ECB2B48606

#@gmail

#@ iCloud

#@outlook

### Match+

Links more customer identifiers to platforms like Meta, Google, Pinterest, and TikTok — increasing your match rates for sharper suppression, better audience targeting, and stronger return on ad spend (ROAS). For example, Match+ helped an apparel brand increase Meta match rates by 24%, and a food delivery company saw a 43% lift without increasing spend.

Together, these tools reduce acquisition waste, improve personalization quality, and drive campaign efficiency. The result is better match rates, higher engagement, and more revenue from the channels and creative you've already invested in.

## How to test and optimize your identity model

Simon treats identity as a performance system, one you can test, tune, and optimize over time.

Marketers can test configurations like:

- Email confidence and recency thresholds
- Priority order of identifiers (e.g., phone, email, user ID)
- Survivorship rules (e.g., last-touch vs. most verified)

And measure impact by tracking:

- Send volume and campaign reach
- Match rate increases across channels
- Conversion lift on personalized campaigns

Simon makes it easy to compare logic changes and publish updates confidently, with version control and full governance built in.

Talk to a Simon expert →

## Identity that delivers results

**Simon Identity** improves outcomes across the entire lifecycle. Brands turn anonymous traffic into personalized journeys without rebuilding creative or tech stacks.

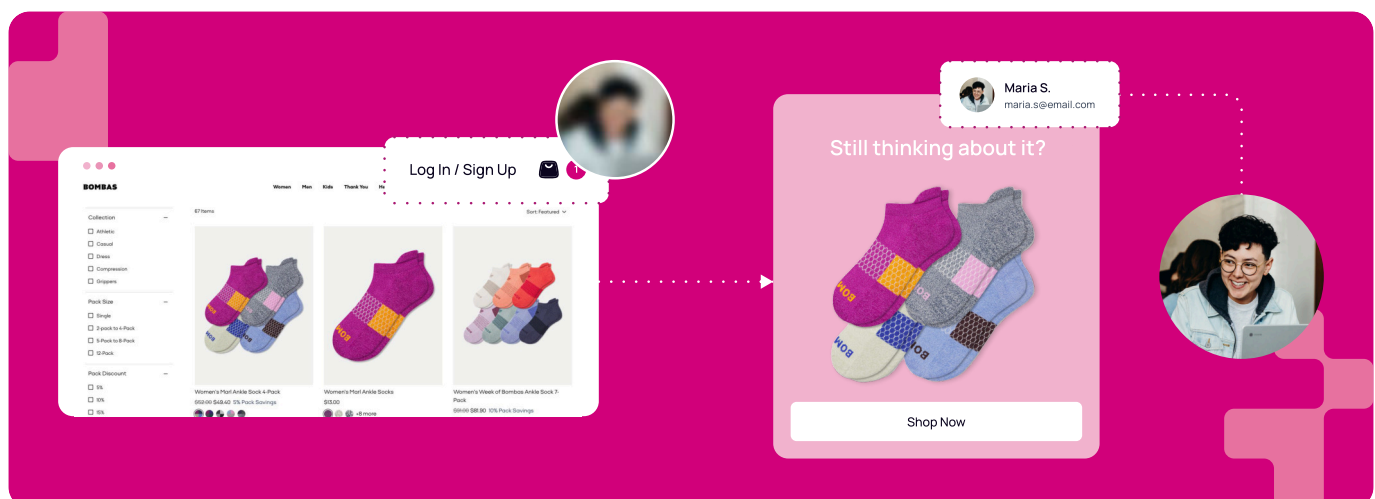
When identity is accurate, accessible, and continuously updated, every team benefits:

- Marketing reaches more customers with personalized, timely messaging
- Product personalizes onboarding and in-app experiences
- Analytics runs cleaner, more trustworthy tests
- CX resolves issues faster with complete context

Identity becomes the shared foundation that connects every touchpoint and accelerates every initiative.

Take Bombas, for example, the comfort-first apparel brand known for its buy-one-donate-one model. With high volumes of anonymous site traffic, Bombas needed a way to activate more shoppers without launching new campaigns or rebuilding creative.

Using **Simon Identity+**, Bombas stitched together anonymous sessions with known profiles, allowing the team to trigger browse and cart abandonment journeys.



The results speak for themselves:

**19%**

average revenue lift since launch

**85%**

increase in abandoned browse send volume

**7.2x**

ROI on abandonment campaigns

**\$575K+**

in supported revenue in just a few months

“My favorite thing as a marketer is a low lift, high impact win. With Simon, we took an audience that we knew was active on our site, identified them, and added them to preexisting campaigns.”



Michelle DeStein

Director of Growth Marketing, Bombas

## Industry-ready across complex journeys

Simon supports brands across sectors where customer journeys span channels, sessions, and devices:

### Retail



#### Use case: Recover more abandoned carts

- **Challenge:** Anonymous browsers make up a huge chunk of traffic, but most retailers can't follow up unless a user logs in or checks out.
- **Solution:** With Simon Identity, brands can stitch together anonymous site activity with existing customer profiles, enabling triggered cart abandonment campaigns.
- **Campaign:** Send personalized reminders (including product recs based on recent behavior) within hours of abandonment.

#### Use case: Reactivate lapsed in-store customers online

- **Challenge:** In-store shoppers often go dark digitally.
- **Solution:** With Simon Identity, brands can connect in-store data and online activity to one unified customer profile.
- **Campaign:** Launch personalized winback campaigns with loyalty offers based on in-store purchase history and online browsing.

## Travel + Hospitality



### Use case: Boost bookings with personalized retargeting

- **Challenge:** Travelers often start booking on one device, browse across others, and drop off before completion.
- **Solution:** With Simon Identity, brands can connect cross-device behavior to a single user, allowing for seamless retargeting.
- **Campaign:** Retarget travelers with destination-specific deals based on abandoned search criteria or partial bookings.

### Use case: Increase loyalty with post-stay campaigns

- **Challenge:** Guest behavior is often siloed across loyalty programs, app usage, and booking engines.
- **Solution:** With Simon Identity, brands can merge these sources into a unified profile.
- **Campaign:** Send personalized follow-ups after a stay — suggesting next destinations, upsells, or rewards redemption nudges based on traveler history.



## Subscription



### Use case: Prevent churn by spotting at-risk users earlier

- **Challenge:** Early signs of churn often go unnoticed when user data is fragmented.
- **Solution:** With Simon Identity, brands can link behavior across sessions, devices, and channels to identify engagement drops.
- **Campaign:** Trigger proactive outreach (discounts, exclusive content, or concierge support) when a user's activity declines, even if they haven't canceled yet.

### Use case: Personalize upsell flows

- **Challenge:** Subscribers often receive one-size-fits-all messaging, missing opportunities to promote higher-tier plans or add-ons.
- **Solution:** With Simon Identity, brands can unify customer engagement across channels and devices, revealing interests and intent.
- **Campaign:** Trigger personalized upsell campaigns featuring premium features, plan upgrades, or add-ons based on customer activity.

## Finance



### Use case: Recover more abandoned applications

- **Challenge:** A customer browses savings accounts, CDs, or credit card offers on site, but doesn't complete an application.
- **Solution:** With Simon Identity, the bank can recognize the anonymous visitor and connect their browsing behavior to their profile.
- **Campaign:** Trigger a campaign that highlights the savings account or CD they viewed with personalized messaging based on their financial goals and online behaviors.

### Use case: Personalize cross-sell offers

- **Challenge:** A customer has a checking account but hasn't explored other products like investment accounts or credit cards.
- **Solution:** With Simon Identity, brands can connect all digital behavior to a single customer profile and find the right moment to recommend relevant products.
- **Campaign:** Target customers who've had a checking account for 6+ months with a personalized offer for a beginner investment account or cash-back credit card.

Simon tailors identity models to your data, campaign needs, and lifecycle goals, so your identity works the way your business does.

# How to get started (and scale)

Building a high-performing identity model doesn't require a full rebuild. Start with what you have. Win early. Scale as your goals grow.

Here's how top teams grow identity maturity in phases:

## 1 Crawl: Clean the foundation

Begin with core deterministic identifiers like email, phone number, and user ID. Resolve and deduplicate records across tools such as your CRM, ESP, and ecommerce platform. Apply survivorship logic to retain the most accurate values.

Launch match tracking to monitor performance in key workflows like cart recovery and abandoned browse. With Simon's no-code interface, marketers can lead this phase without heavy support from engineering.

## 2 Walk: Add behavioral context

Next, bring in real-time web and app behavior to resolve anonymous visitors. [Simon Identity+](#) uses session and device context to link activity to known profiles.

You can apply confidence scores and custom field rules to improve accuracy. Model testing tools help you validate performance and track improvements over time.

## 3 Run: Expand your graph

Finally, layer on [Match+](#) and [Enrich+](#) to fill profile gaps, improve media match rates, and unlock deeper segmentation.

At this stage, teams typically begin measuring downstream impact, reduced CAC, higher CLV, and faster campaign launches, all tied back to stronger identity data.

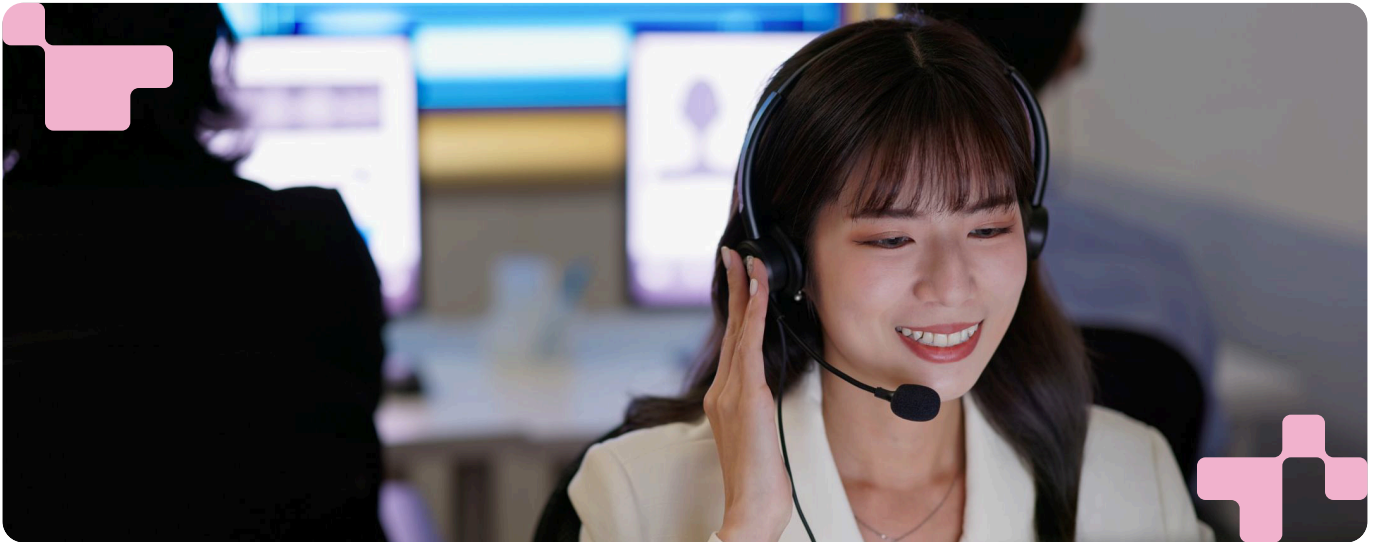
Simon supports every phase with expert guidance and flexible services, whether you need help implementing or prefer to manage in-house.

## What to expect in the first 30–60–90 days

Most customers start seeing measurable outcomes within the first few weeks, because implementation is more than plugging in tools. It starts with services designed to set a strong identity foundation from day one.



## Simon's Identity Services



Before you launch campaigns, Simon helps you build a clean, unified identity layer that's purpose-built for performance. This includes:



### Identity Assessment

We evaluate your current setup, uncover gaps in resolution and match rates, and provide a clear action plan for improvement.



### Simon Dedupe

Our deduplication service consolidates fragmented records across systems using customizable logic, eliminating noise and resolving inconsistencies.



### Customer 360

We help you construct a full-view customer profile that combines demographic, behavioral, and transactional data into a single source of truth.

With this foundation in place, here's what the first 90 days typically look like:

#### Day 0-30

- Connect data sources: CRM, ESP, ecommerce
- Run deduplication and initial identity pass
- Configure resolution and survivorship logic

#### Day 30-60

- Integrate session-level and behavioral data
- Activate priority segments
- Improve pre-existing campaigns with Identity+

#### Day 60-90

- Push audiences to Meta, Google, and other media platforms via [Match+](#)
- Enrich profiles with household and demographic data
- Deploy a repeatable workflow for model testing and optimization

Throughout onboarding, Simon's team works closely with yours to validate inputs, refine logic, and support activation, ensuring a clear path from setup to impact.

## Fast for marketers. Transparent for data teams.

Simon gives growth and lifecycle teams the ability to build and manage identity logic on their own timeline. Use no-code tools to configure models, or go deeper with SQL. Because it all runs directly in your warehouse, your data remains fully visible and secure — no new silos, no workarounds.

## Identity is a marketing system now

Customer identity is no longer a back-end function. It's central to how brands personalize, target, and grow.

Simon puts identity control in the hands of marketers. Build, test, and improve logic directly — no tickets, no guesswork, and no reliance on prebuilt models.

# Identity powers performance

Every message, campaign, and experience depends on knowing who you're talking to.

Simon helps you build a complete, accurate customer record across your stack, so you can reach more people, reduce wasted spend, and personalize with confidence.

### Start with an Identity Assessment

Our team audits your current approach, highlights key gaps, and maps the fastest path to stronger results.

Talk to a Simon expert →