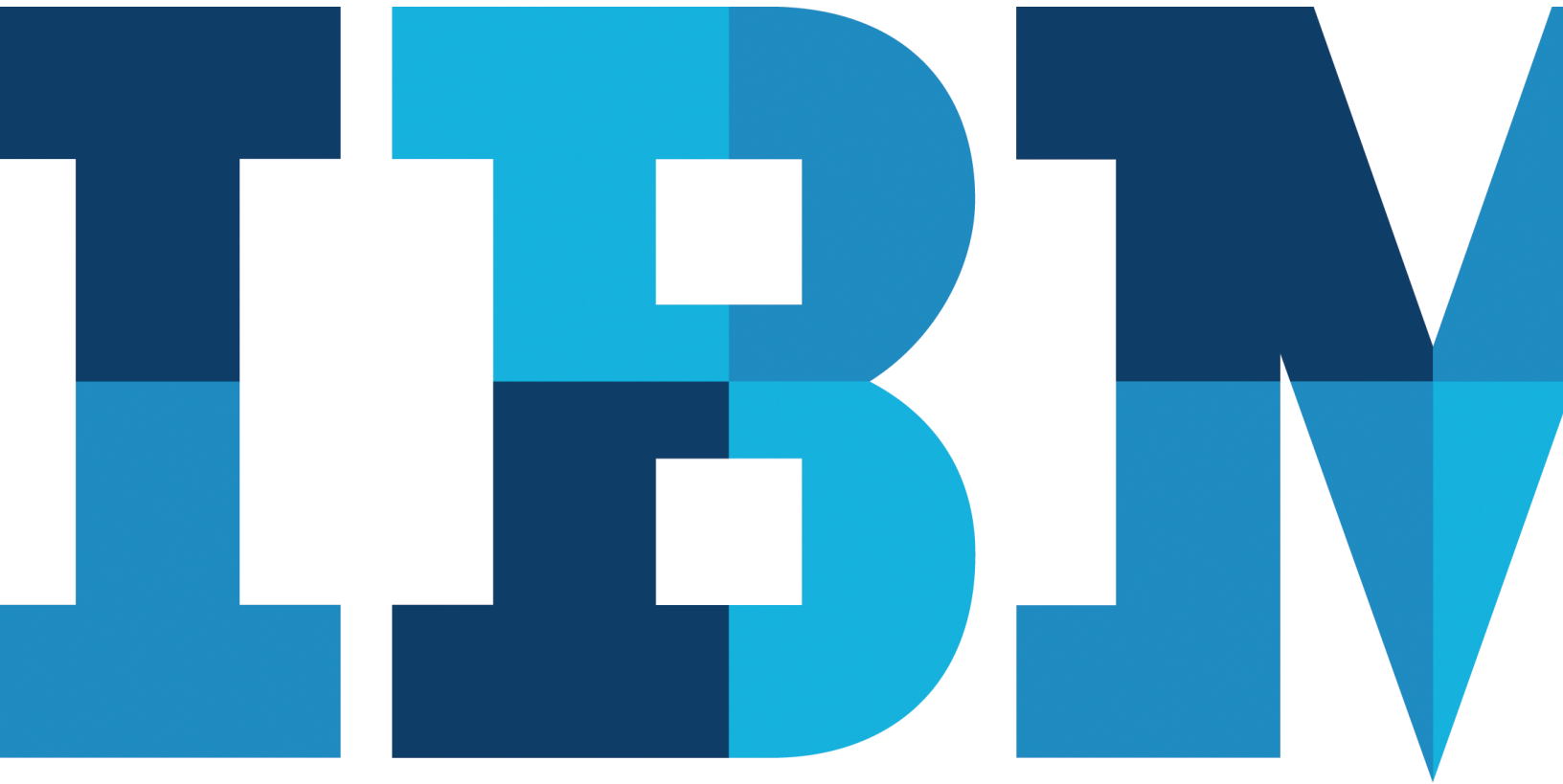


IBM Software

Information Management

# MDM-Powered Solutions for Salesforce CRM

*Customer data you can trust for sales and  
marketing success*



## Contents

- 2 Introduction
- 2 Empower Sales and Marketing
- 3 Salesforce CRM Data Challenges
- 4 Extend the Enterprise Value of Salesforce CRM
- 4 IBM MDM for Salesforce.com
- 6 Conclusion

## Introduction

Salesforce.com is a customer relationship management (CRM) application used to manage customers and prospects and associated contacts at those organizations. Although an extremely powerful and popular application for managing and nurturing a company's interactions with customers and sales prospects, it has some deficiencies that master data management (MDM) can augment and resolve.

This paper will discuss the challenges that Salesforce.com users face in managing customer and prospect information and explore the benefits of an MDM-powered solution for Salesforce CRM. In particular, the paper will describe how IBM Infosphere MDM addresses these CRM challenges and helps companies:

- Increase productivity;
- Improve sales and marketing performance;
- Mitigate risk associated with poor customer data.

MDM for Salesforce.com delivers on the promise of single, complete and enriched views of customer and prospect data provided to sales and marketing users so organizations can improve operational efficiency and employee productivity, increase customer service and satisfaction and deliver additional business value to accelerate sales and marketing success.

## Empower Sales and Marketing

Sales and marketing personnel rely on quality customer data that can be easily searched, resolved and enriched to support

their daily business use. Customer and related data is continually added, searched and tracked primarily within the CRM application but also across other applications and data sources. With multiple data creators, editors and users comes a greater likelihood of error. And poor customer data quality affects sales and marketing performance in a number of ways.

For instance, sales representatives end up creating new records when a contact is already known and incomplete customer information results in time searching for missing information and wasted calls. At the same time, sales management wants to ensure that sales representatives can easily and quickly access the information they need to be effective rather than wasting time in front of a workstation when they could be meeting with prospects. These same sales force productivity drains impact customer service when customer expectations may be missed due to a lack of a complete customer views or when sales representatives lack an understanding about the customer and their account history.

Sales operations management also wants accurate information on customers, prospects and sales opportunities in order to create accurate sales reports and effectively deploy sales and marketing resources. Marketing management is keen to improve the returns from lead generation activities by ensuring contact lists are clean, so they can pass leads over to the sales system quickly and efficiently with minimal involvement from skilled marketing resources.

For example, duplicate records and poor customer data may trigger multiple mailings making lead generation activities more costly and less effective. While contact lists and campaign updates from external data sources need to be manually merged into the CRM application with the use of expensive marketing resources.

MDM can allow companies to address these and other related sales and marketing business requirements by adding better data and services that increase productivity and improve sales and marketing performance .

## Salesforce CRM Data Challenges

Salesforce.com is a CRM application used to manage customers and prospects and their associated contacts and customer interactions at those organizations. Although an extremely powerful application for managing and nurturing a company's interactions with customers and sales prospects, it has some deficiencies that MDM can augment and resolve. Specifically, MDM is able to address data challenges related to record duplication and data enrichment.

### Record Duplication

Salesforce.com users share a common frustration with duplicate records being found for the same customer record. Duplicates can easily propagate within Salesforce.com for a number of reasons. Bulk data entry and external list loads resulting from marketing activities such as trade shows, campaigns and mailings require onerous, manual tracking with existing customer records, are prone to errors and readily create duplicates. And it is difficult within Salesforce.com to identify and fix duplicates. At the same time, limited built-in search capabilities do not find duplicates where customer records may have typographical errors, misspellings and variations of customer name or addresses. This causes users to create new records where customer records already exist. Duplicate records not only frustrate users but also compromise the use of the CRM application where the data is perceived to not be trustworthy.

Salesforce.com employs a simple search and indexing mechanism that requires an exact data match and only operates on its own records – it has no way to bring in other sources of data. For example, when a sales representative needs to enter information about a contact, a search for existing records only returns exact matches to the supplied search term(s). They would have to search for “St”, “St.” and “Saint” to find all of the possible matches. This would take multiple searches to find the correct, accurate record – while most users expect the search to be more like Google search where all relevant results are returned. As a result, the sales representative finds very few or no matches and the likelihood that they will create a duplicate record will increase. The limited search and indexing capability

also creates a scenario where sales representatives searching records to prepare for a customer meeting or call may only view part of the customer's account and customer interaction history based on the particular version of the customer name used during search. As a result, customer expectations may be missed due to a lack of complete information.

This same problem also manifests itself when large data updates are required, such as when the marketing department needs to load the results of a lead generation or marketing campaign. In this case, marketing administrators must manually import the data into Salesforce.com, checking as much as possible for duplicates and trying to avoid creating a whole set of new ones. This is a very time-consuming exercise, that significantly delays the time it takes and the ability to gain the potential benefits from the campaign while also using up valuable marketing resources on menial tasks.

### Data Enrichment

The lack of flexibility of Salesforce.com can also impact sales prospecting and marketing effectiveness by missing out on opportunities to add value to the CRM data. Salesforce.com has no way to automatically enrich the customer information with data from other enterprise systems or third party data sources such as Dun & Bradstreet. Rather, when it is necessary to combine CRM and external data to make informed decisions, the user is required to switch between the CRM application and other applications and relevant data sources to gather the complete information and then manually assimilate it. This manual process is extremely time-consuming and prone to errors - the reason why sales and marketing users simply will not bother - and users continue to operate on incomplete information.

This lack of a complete, enriched picture of a contact and their account history has some unfortunate consequences. For example, when a sales representative visits a customer without complete, accurate knowledge about other calls made and the overall account history, the customer is made to feel undervalued. It also creates the perception of a supplier who is not aware of what is going on. This same lack of information

may also lead to poor management and governance. Poor quality information may result in failing to meet regulatory requirements in areas such as customer care, and will also reduce management's ability to manage and control operational activities and performance.

MDM allows companies to provide enterprise-wide access to more complete and trusted data, automate manual processes and enable new capabilities that were not possible before. With single, complete and enriched views of customer and prospect data sales and marketing performance improves.

### **Extend the Enterprise Value of Salesforce CRM**

With IBM InfoSphere MDM, Salesforce.com users can have and provide single, complete and trusted views of customer data to users and address the inherent CRM data challenges of data duplication and data enrichment and extend the enterprise-wide value of Salesforce.com by improving overall sales and marketing performance. Specifically, companies are able to provide enterprise-wide access to trusted customer data, automate manual processes and enable new capabilities that were not possible before by augmenting Salesforce.com with MDM data and capabilities.

IBM InfoSphere MDM helps companies improve productivity, increase operational effectiveness (customer satisfaction, sales performance and marketing efficacy) and mitigate risks associated with poor customer data and governance. Additional benefits are derived including, among others:

- Sales and marketing productivity is increased.
- Marketing leads are better qualified and passed to sales sooner.
- Sales processes are streamlined.
- Sales and marketing morale is improved.
- Operational costs are reduced.
- Operational and governance risks are mitigated.
- Customer service and customer experience is enhanced.

### **IBM MDM for Salesforce.com**

IBM InfoSphere MDM can be implemented to deliver data and associated services natively to Salesforce.com so that users can operate within the familiar Salesforce.com user interface, avoiding the need for sales and marketing users to switch among multiple applications. An MDM-powered Salesforce.com replaces time-consuming, manual processes with simple, automated processes to search customer records, remediate duplicate records and upload and integrate external data. The result is that sales, marketing and operations staff are better informed and made more productive for improved customer satisfaction and increased sales effectiveness and results – while management has an accurate view of customer and prospect activity necessary for proper governance.

### **MDM Functionality Delivered to Salesforce.com**

Master data management of Salesforce.com data makes your Salesforce.com users more productive by ensuring the quality of existing customer data is improved and by providing a single, trusted view of customer information regardless of which internal system those records are stored. This is accomplished without forcing users to change their usual behavior, without forcing restrictive rules and procedures and without forcing sales and marketing users to learn or use a new system.

The seamless integration of IBM InfoSphere MDM with Salesforce.com is transparent working silently behind the scenes to synchronize data from different sources, both internal and external to Salesforce.com. Duplicate records are automatically flagged to users when conducting searches before entering new records. And customer data is enriched with complete views and relationship views that are presented directly to users just as they are accustomed to within Salesforce.com.

This is in sharp contrast to Salesforce.com deployments that commonly require manual synchronization of multiple information sources, manual de-duplication of data and the simultaneous use of several applications and tools to try to obtain a complete, accurate view of a customer and their account history. MDM provides a permanently de-duplicated,

## Improved Productivity

- Salesforce.com users do not have to enter contact information multiple times
- Salesforce.com users can avoid wasting effort due to incomplete information
- Integration of other data sources add value to the Salesforce.com information
- Bulk updates can be integrated into Salesforce.com more quickly and without requiring expensive marketing resources to perform menial tasks
- Users remain in the Salesforce.com environment, so no retaining needed

## Operational Effectiveness

- The customer picture is complete, resulting in improved handling of existing opportunities and quicker discovery of new ones
- Data enrichment leveraging all available information sources enhances sales prospecting and qualification
- Added confidence in data quality improves morale
- Marketing leads are processed more quickly and accurately
- Increased automation frees up expensive skills from menial tasks
- Lead generation activities can be better targeted and less costly

## Risk Mitigation

- Accurate customer information results in better service and higher customer satisfaction
- Improved data quality enables better governance
- Enhanced data visibility enables management to make better decisions
- Enriched information may identify new issues or concerns

single, complete and enriched view of your customer – no matter where the information resides within your organization.

Master data management of Salesforce.com data automates several CRM manual processes and delivers new functionality from within the Salesforce.com environment using the same, familiar look and feel. In this way, users can readily adopt and benefit from the new capabilities with minimal retraining.

### Enhanced Search

The Salesforce.com search function is significantly enhanced to include more accurate, probabilistic search and searching against the MDM hub and other third-party data sources so that all potential matches are returned. Third-party and other non-Salesforce.com data sources (such as Hoovers, Equifax or Dun & Bradstreet) and their search results can now be displayed to the user within the Salesforce.com interface, enriching the information without requiring switching among applications and tools.

When a user searches for a contact or customer within Salesforce.com it will be immediately apparent whether that customer or contact already exists using advanced, probabilistic search.

For example, when a user searches for “St Agathe”, all potential matches will be returned rather than only the exact match. The user can now check to see which customer record is the correct one, and will only need to create a new record if one does not already exist.

The improved search capabilities return more results and make evident all existing records, avoiding the creation of duplicate records. This in turn ensures that the user will get a single,

accurate view of the customer since there will only be one unique record. In addition, search results for a contact or customer now return all related information so the user is also presented with a complete view of the customer and their account history. In this way, sales representatives and customer service staff are informed and prepared to meet customer expectations, increasing customer satisfaction and mitigating risk. At the same time, sales representatives can easily and quickly access the information they need rather than wasting time, improving sales force productivity.

### External Data Sources

Master data management of Salesforce.com data allows for the integration of other sources of information to be imported and displayed within Salesforce.com, enriching customer information and enabling a complete, trusted view of the customer for improved decision-making, including the ability to identify new sales opportunities.

Salesforce.com does not provide an easy way to integrate and augment records with other enterprise and third-party reference data essential to sales and marketing processes – such as standardizing addresses or matching customers with reference data from Hoovers, Dun & Bradstreet and Equifax. Address correction and mediation is now provided to Salesforce.com users via integration with AddressDoctor®, ensuring address data quality.

IBM InfoSphere MDM software can match its data against Salesforce.com records and augment those records by feeding in third-party reference data about a customer. In this way, master data management of Salesforce.com data combines



existing Salesforce.com data with other enterprise and third party information all from within the familiar Salesforce.com environment without requiring users to switch among applications and tools, improving productivity. Moreover, delivering trusted, complete and enriched information, all within the Salesforce.com environment, increasing user satisfaction and the perceived value of the CRM application.

### **Provisional List Load**

Master data management of Salesforce.com data enables large volumes of data to be uploaded and merged automatically and accurately, with only exceptions requiring manual handling. This is particularly useful for uploading and merging data into Salesforce.com following a trade show or lead generation campaign. Typically, marketing consumes excessive amounts of time and menial efforts to manually upload and merge marketing activity data into Salesforce.com, resulting in wasted time, delays in getting leads passed to sales and the increased likelihood of errors – not to mention the creation of duplicate records.

Master data management of Salesforce.com data automates bulk data entry by automatically merging duplicates with existing Salesforce.com data. Provisional bulk data is loaded and matched against the trusted, accurate data in the MDM hub without creating duplicates, because lists are checked against trusted master data to identify and flag exceptions before leads are loaded. A list of exceptions is automatically generated and the appropriate person is notified to review and determine whether flagged records should be merged. As a result, leads generated from marketing activities are passed onto sales more quickly, contact lists are clean, and prospecting data is accurate and resolved against the trusted data in the MDM hub – with minimal involvement from skilled marketing resources.

### **Conclusion**

Extending the value of your company's investment in Salesforce CRM by addressing its shortcomings and adding better quality data and services for business users is enabled

with IBM InfoSphere MDM. Enterprise-wide access to trusted customer data and new capabilities including enhanced search, third party data integration and provisional list load are made possible by augmenting Salesforce.com with MDM.

IBM InfoSphere MDM addresses the CRM data challenges related to record duplication and data enrichment to deliver single, complete and enriched views of customer and prospect data to sales and marketing users. Organizations are now better able to improve productivity and operational efficiency, increase customer satisfaction and realize additional business value to improve sales and marketing performance.

### **About IBM MDM**

The IBM MDM portfolio delivers a single, unified, trusted version of truth about an organization's critical entities – customer, supplier, product and more. Armed with this single, trusted view, organizations can make better decisions and improve business outcomes – higher revenue, better customer or citizen satisfaction, improved patient care, lower cost and risk. With IBM MDM, organizations can understand their core master data (customers, patients, products, etc.) at all touch points, improve cross and up-sell, optimize the value of ERP, CRM, analytics and warehouse systems, support governance initiatives and make business processes more effective.

## InfoSphere. software

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