# DATA
## QUALITY MANAGEMENT
### AT THE EDGE VS THE CORE:

# Introduction

**According to Gartner's Chief Data Officer Survey, improving and maintaining data quality is one of the most important business expectations of data and analytics teams globally. The average annual spend on data quality tools has significantly increased over the last few years, going from $208,000 in 2016 to $231,000 in 2017 and $261,000 in 2018 (Gartner).**

However, many teams still struggle with assigning ownership of data quality. "Who's job is it to make sure our data is current, complete, and trustworthy?" is a common question we hear from sales, marketing, and data operations teams. The answer lies within the origins of your customer data. This can be broken down into two main facets, the edge, and the core.

The edge refers to the marketing automation system(s) (e.g Marketo, Pardot, Eloqua, etc.) that control and process new data -often in the form of leads or prospects- entering your database. These automation platforms mark the perimeter between the demand for your product, and the data off of which your marketing team uses to nurture and qualify leads. We call this the edge because it deals with raw data flowing into your system, often incomplete and lacking the proper data attributes to achieve a single customer view.

The core is the CRM (e.g Salesforce, Microsoft Dynamics) where the majority of your customer data is housed. This data is accessed across the entire organization, with sales, marketing, IT, finance, and other teams having a stake in the integrity of this data. Because this data drives most of your business decisions, the core is where many data quality initiatives begin and end.

So this begs the question, "Should we be spending our time, money, and resources to improve data quality at the edge or the core?" The answer is both. *Here is why:*
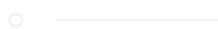
# Data Quality Management
# at the edge vs. the core

So, your sales operations (SOPS) team just got a data quality management and enrichment tool. You're excited about how marketing operations (MOPS) will be able to benefit from data normalization, segmentation, deduplication, and even enrichment. But quickly you realize that your objectives are not completely aligned to your sales operations counterparts. They don't mean to exclude your requirements; their domain is the CRM and their objectives most likely haven't incorporated your customer experience focus.

But we all have the same goal, right? Understanding SOP's perspective is important as there are already too many custom fields, too many workflow rules and hundreds of field updates that have gotten to the point of unruly. In most corporations, no one is taking on the task to redesign the data model across the enterprise. The MDM initiative, if it gets funded, is at least 18 – 24 months off.  In the meantime, your lead scoring is not getting traction, your segments are not converting, and the desired behavior and experiences are not getting delivered.

Since you can always sync between MAP and Salesforce, the real question is: where should you manage and enrich the data first, CRM or MAP.  Having been in the data quality industry for the last 15 years and having supported both approaches for both our sales and marketing stakeholders, we have finally settled on it: for the majority of environments, you should manage your data in both, MAP and CRM- The edge and the core respectively.
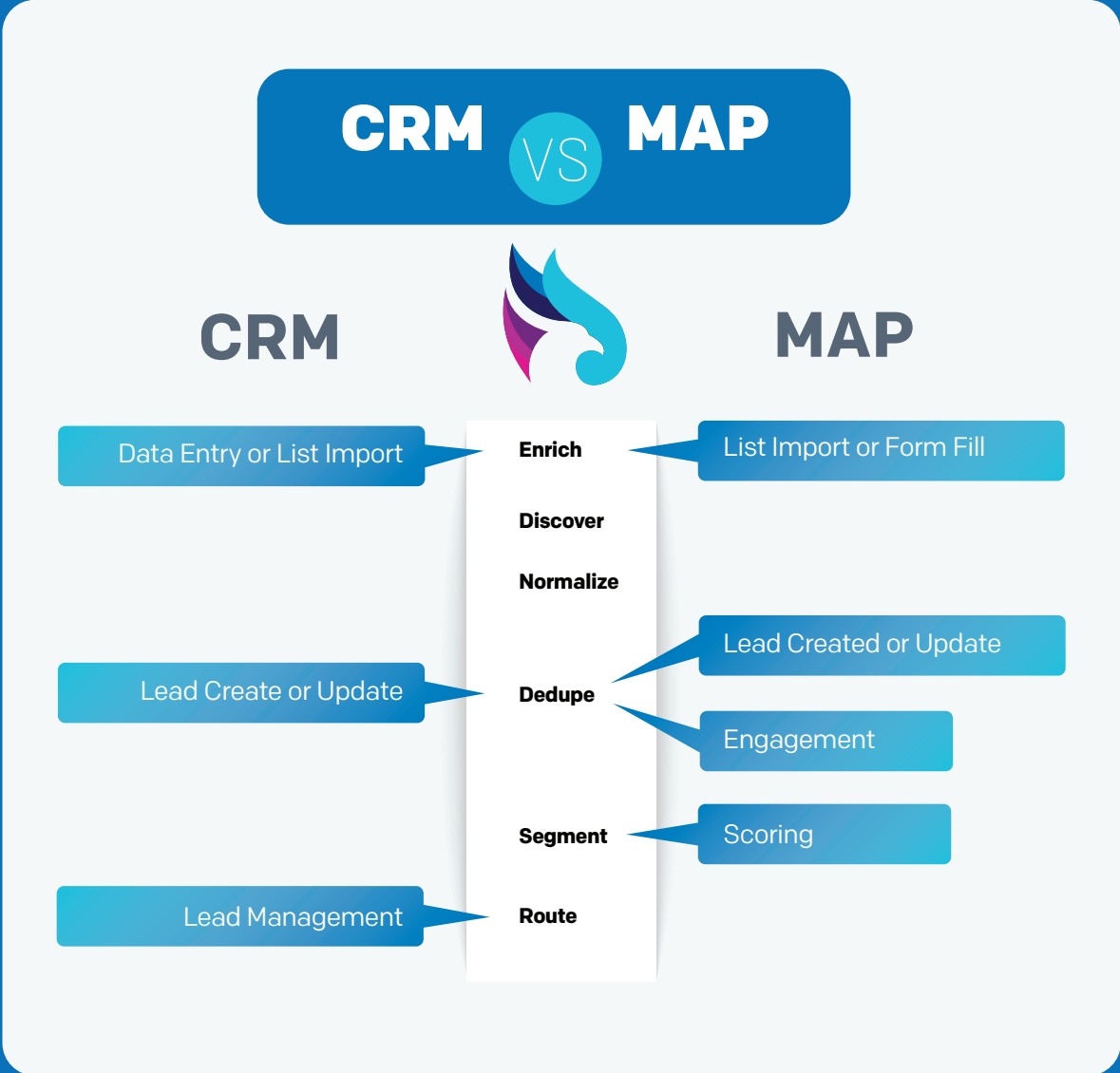
Why? It all comes down to timing and the MAP & CRM sync processes. There are many reasons why the sync between MAP and CRM is the sticking point. Most importantly of which is managing the number of API calls to each of these platforms. This minimizes the number of times they have to sync before the logic you have painstakingly designed can trigger all of the sub-processes related to that data.

If most of your records are created in MAP (forms, API, lists, etc.) enriching in the MAP provides the opportunity for subsequent processes (that often also live in MAP) to run before the sync to CRM takes place.

Enriching, normalizing and routing in CRM requires multiple sync cycles for the enriched data to influence the lifecycle and scoring logic. In times of excessive sync demand, this can drastically slow down your lead flow, frustrating sales as they wait for the leads to be ready for follow up. That being said, departments with different objectives like sales ops will want to load lists for activities such as call blitz campaigns in CRM; so mandating a MAP-focused process just won't suffice.

The key to maintaining critical data quality lies in choosing a DQM that can connect to any platform, whether that is a CRM, marketing automation platform, or any other component of your tech stack.

## CRM vs MAP

**CRM**

| CRM | | MAP |
|---|---|---|
| Data Entry or List Import | **Enrich** | List Import or Form Fill |
| | **Discover** | |
| | **Normalize** | |
| | | Lead Created or Update |
| Lead Create or Update | **Dedupe** | Engagement |
| | **Segment** | Scoring |
| Lead Management | **Route** | |

# Lead scoring

# Segmentation

Having the data available for firmographic and demographic scoring before a lead hits CRM is useful because it ensures the lead data is as complete as possible. Therefore, this record is ready to score, which can then trigger MQL logic before (or in tandem with) the sync with the CRM. This dramatically speeds up the MQL process as compared to multi-sync processes needed if you normalize, dedupe and enrich in CRM first or only.

# Lead routing

Similar to scoring, if you are using MAP for lead routing and you have the data enriched and normalized in MAP (for example routing by geo against normalized location information) you'll have it available for your routing rules immediately; saving you time and getting leads to your sales reps faster.

Even if you currently manage your routing rules in CRM, having the data available immediately when the record is created in CRM allows your assignment rules to trigger immediately. This is especially true if you have named accounts and need the association of the lead to the account record upon creation. Reducing the reassignment or triage process significantly

In many cases, lead and contact nurturing, ABM activation, and account-based management requires trigger-based emails and dynamic content. This is generally contingent on correct ownership and persona to be assigned. This is one of the two main reasons personalization fails across the enterprise.

The second is not having a combination of profile, campaign, and activity data properly normalized to the journey stage. This creates a lack of understanding of where the account or contact us in their buying motion, causing both sales and marketing to deliver the wrong content and create a poor customer experience.

# Sync Delays

Related to all of the above, the sync between MAP and CRM is temperamental and can easily become overloaded. A big update in CRM or a list import can delay the sync minutes or even hours, slowing down all MAP operations.

By lowering the number of times you need to sync between the two systems, especially during times of high sync demand, you will improve performance across all elements of your stack and improve the efficiency of your business processes such as the BDR outbound motion or routing for next best action or campaign. Most things that lower the burden on the sync are generally worth it, as sync issues often set off a chain reaction of other marketing automation fires you'll need to address.

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