

CASE STUDY

How Morningstar streamlined its list import process with RingLead



Overview

The Company

[Morningstar Corporation](#) is a world-leading supplier of solar charge controllers and inverters, with over 4 million units installed in over 100 countries. Morningstar's products have been recognized in international solar markets as the most advanced and highest quality products available

Industry

Renewable Energy

Challenge

Morningstar needed to streamline its list import process for webinars, trade shows, and other strategic events.

Solution

RingLead Cleanse and Duplicate Prevention

Results

Morningstar was able to drastically reduce the time required to process and import trade show lists by deploying RingLead. Year-to-date, Morningstar prevented 10,000 contact duplicates, 2,700 lead duplicates and 869 account duplicates.

10,000
contact duplicates
prevented

Business Challenge

Morningstar needed a solution to upload lists of prospects from webinar registrations, trade shows, and other strategic events throughout the year.

Morningstar was spending hours scrubbing thousands of records for duplicates each time they obtained a list. This manual process caused significant challenges and delays across departments, impacting at least 10 employees in sales, marketing, and product management.

When searching for a solution to address its challenges, Morningstar looked for a solution that could add and deduplicate several hundred spreadsheets of records into Salesforce. The team needed a solution that would update missing data, without overwriting existing data. Robust reporting to easily view how many records from a given list were net new vs. existing, and updated, was another key buying criteria for Morningstar.

In addition to general ease of use, Morningstar desired a web-based solution that would allow them to add and deduplicate lists while out of office.

“*Ringlead is easy to use so we have not needed much technical support. When we have needed support, we usually were able to have our questions answered by the videos within the resources tab of the Ringlead site.*”



Mark McHenry
Marketing Manager





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Solution

Morningstar deployed RingLead Cleanse and RingLead Duplicate Prevention to streamline its list import process and enable perimeter protection around Salesforce.

Morningstar was specifically interested in the flexibility of RingLead's list import, including the ability to use strict or fuzzy matching logic, create and save templates for ease of use, and assign uploaded records into specific Salesforce campaigns for appropriate sales and marketing engagement.

RingLead's list import boasts robust matching logic criteria and customizable surviving record rules to help users determine how potential duplicates are matched, and which field values survive during a merge. RingLead's list import empowers users with the ability to match net new leads to existing accounts, import lists of accounts, and create contacts and accounts if no match is found.

Cleanse and Prevention are both available as stand-alone data quality solutions, or as components of RingLead's fully integrated, scalable data management solution. RingLead tackles all core data management processes including data discovery, deduplication, standardization, protection, and enrichment.

RingLead integrates directly with leading CRMs and Marketing Automation Systems like Salesforce and Marketo to empower organizations with complete, centralized and secure control over their data.

Results

By deploying RingLead, Morningstar was able to automate its list import process to ensure Salesforce was continuously protected from dirty, duplicate data.

Year-to-date, Morningstar prevented 10,000 contact duplicates, 2,700 lead duplicates and 869 account duplicates with RingLead.

Morningstar was able to better determine the ROI of webinars, trade shows and other events by quickly identifying net new vs. existing records, and creating tasks to automatically update campaign statuses (registered vs. attended).

The ability to assign new records to specific Salesforce campaigns allowed Morningstar's sales and marketing teams to better engage with new records, with marketing now confident records were in the right email campaigns, and sales now confident they were calling on the right leads.

"Ringlead allows you to save templates so that entering data from similarly formatted spreadsheets can be done very quickly and easily... Ringlead's ability to normalize and route leads to appropriate users is a big benefit."



About RingLead

Since 2003, RingLead remains the market leader in data quality, lead optimization and trusted partner of large enterprises, Fortune 500 companies and small businesses across the globe.

ringlead.com

