

MARKETERS VS DUPLICATE DATA

HOW YOU CAN WIN



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CONTENTS

03 INTRODUCTION

04 WHAT'S THE PROBLEM WITH DIRTY DATA?

06 SOLVING THE PROBLEM

09 INTEGRATING WITH MARKETO

11 CHOOSING A DATA QUALITY PLATFORM

12 CONCLUSION

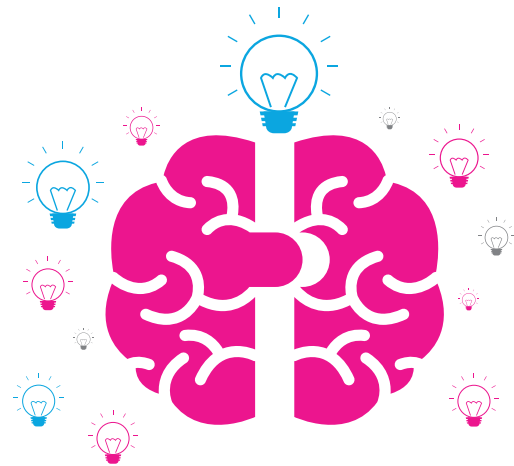


INTRODUCTION

Eight million people change jobs each year. 75 phone numbers change every 30 minutes. All of this results in incorrect contact information in your database. Your data is decaying as you read this ebook.

Dirty data has a way of silently infiltrating your organization, creating frustration, inefficiency, and dismal user adoption in the systems themselves. It can affect each department and group of stakeholders in a very different way, but unless there is a “State of Our Data” address, the problem is not brought to the forefront of the organization’s collective psyche.

The good news is, as marketers, you are not alone and there are solutions to find, remove, and prevent bad data as well as enhance the data you already own.



This ebook will dive into the crux of dirty data for marketers and by the end, you’ll have the education and enlightenment to stop bad data once and for all.

WHAT'S THE PROBLEM WITH DIRTY DATA?



The result of dirty data is massive. Your reports, Dirty data costs you money. It could be upwards of \$100 automated processes, workflows, and drip nurture campaigns are skewed. Dirty data affects morale, because dirty data is frustrating and inefficient for marketing.

You invest so much time and money into your marketing automation, CRM implementation, and ongoing administration and improvement, but it's all rendered useless when you come into contact with dirty data.

In other words, your CRM and marketing automation databases are a hot mess.

Dirty data costs you money. It could be upwards of \$100 per dirty or duplicate record, which is quite serious.

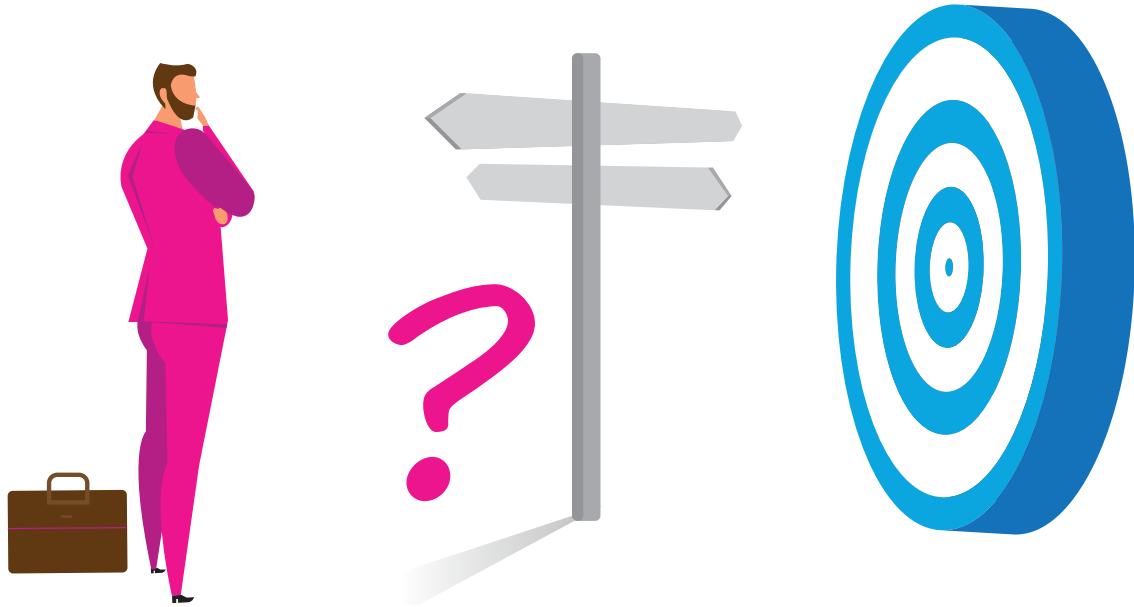
Many marketing automation platforms charge based on number of records, so you're paying for the same data multiple times.

When it comes to duplicates or any problems with your data, the blame game often surfaces. No one wants to take ownership of the data itself. The data owner cannot clean up the database unless they are in lock-step with the departments using the data, including marketing.



For instance, if the data owner is a system admin, they need to be advised on which records to merge, as they're not the marketers running reports or the sales managers pulling performance metrics.

Whatever your messy situation may be, you will quickly realize that it all comes back to quality data, because data is the real value in your CRM and marketing automation platform.



HOW DUPLICATES HAPPEN

Leads come at you from multiple directions. You generate a lead from a free trial, for example, and then that same lead also downloads a whitepaper. Bringing those two actions together without matching email addresses results in duplications. And that's just marketing. Imagine all the other ways leads come in via sales, lists, referrals, etc. Without a way to manage this, you're up a creek with no paddle.

This happens more than you would think.

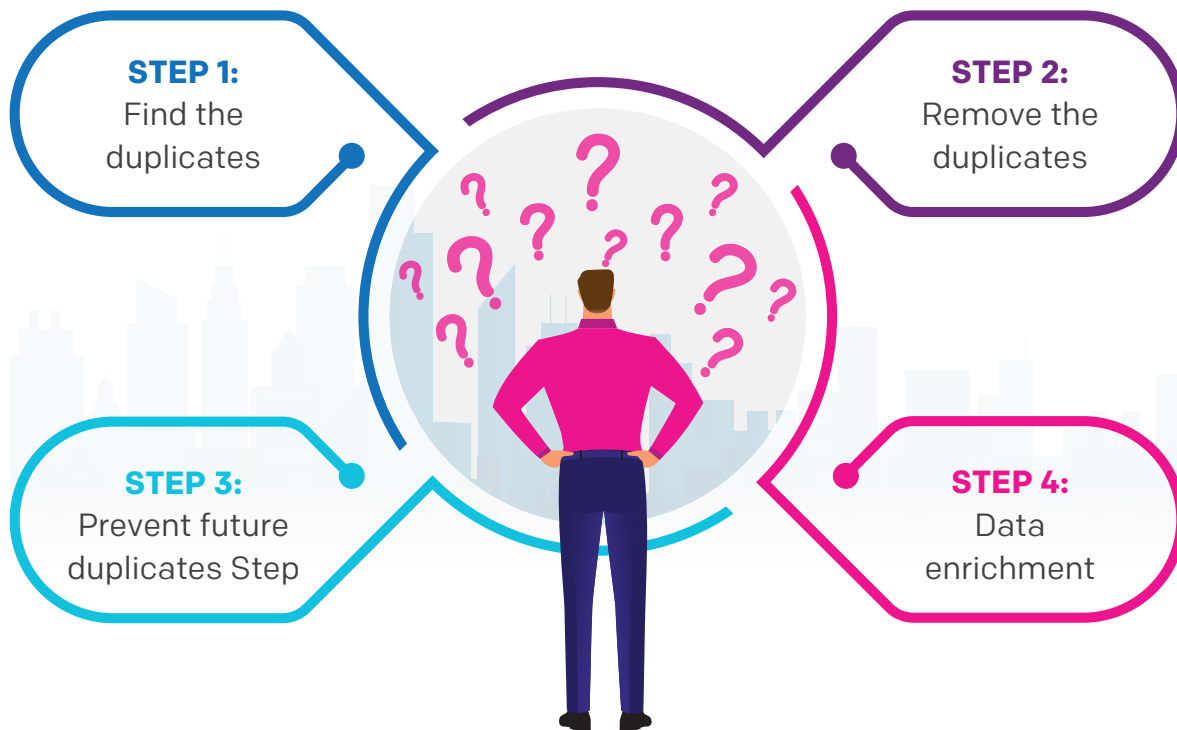
For one RingLead customer, 80% of their web form submissions were duplicates. While the range of duplicates can go from 10% to 40% for the average company, the number of duplicates depends on the nature and strength of your data.

SOLVING THE PROBLEM



Now that you understand dirty data and how it happens, it's time to stop it once and for all.

HERE IS THE STEP-BY-STEP PROCESS



STEP 1: FIND THE DUPLICATES

Use an application (there are free ones out there) to see a dashboard of your duplicate situation. From there, select where you want to focus. For marketers, focusing on leads might be more important than other objects in Salesforce,



FOR EXAMPLE

Notifications when duplicates arise is important to ensure duplicates are stopped and prevented going forward. Depending on the data deduplication vendor, you can have many different templates to notify the owner of the lead or contact that there's a duplicate. Typically, the account owner is alerted first, but for new leads, you can route it through your assignment rules in Salesforce.

Consider using your active assignment rule or even a hidden inactive assignment rule just for your data deduplication vendor.

You can also change the owner of a lead, and reroute it through the assignment rules. For email, you can trade tasks with an email notification.

STEP 2: REMOVE THE DUPLICATES

Use an application for duplicate removal which finds your existing duplicates and merges them together. Duplicate removal merges the duplicates and cleans up the database quickly. For every minute that goes by, there will be fewer duplicates until finally, no duplicates will remain.

To make sure the duplicate is merged with the right contact, you'll need to set master rule settings. This way, all new data matching the original record, or master record, will automatically match and merge. If you have five records in Salesforce, you likely only want to keep the lead source from the first/master record, but use all of the current title and phone number fields from the most recent entries.



How accurate is data deduplication? The more fields you have, the more information you gather. That means, the data quality platform can do a better job at removing duplicates. In other words, the more fields, the better. More fields and more data establishes the groundwork for data enrichment, which we'll discuss in Step 4.

STEP 3: PREVENT FUTURE DUPLICATES

Once your data is clean, you want to keep it that way. Duplicate prevention stops the bleeding, and ensures you're not simply putting a cap on that leak. Dirty data will continue to infiltrate your system as your contact data changes, but with strong prevention apps specific to marketers, your data will be checked before it enters your system to avoid duplicates.

Duplicate prevention checks your new data against your existing data to make sure that it's unique.

Whether you're loading the data in or it's coming from a web form, duplicate prevention acts as like a gatekeeper to make sure all data going in is unique.



STEP 4: DATA ENRICHMENT

Just-in-time contact and company data provides real-time data to marketers in a similar way that Google provides real-time search results for websites. This technology comes into the Salesforce world and creates a great tool for marketers.

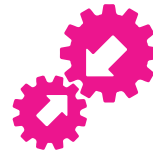
This goes beyond finding duplicates because once you have your unique data, you're going to want to augment it or enhance it. That's where data enrichment comes in. It scours the web to fill in the empty fields in your lead or contact data.

Data enhancement boosts the data you already have. For example, a contact's URL can help identify other team members at that company, the company address, social profiles, etc. Now that your data is clean, your enrichment opportunities are endless.



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INTEGRATING WITH MARKETO

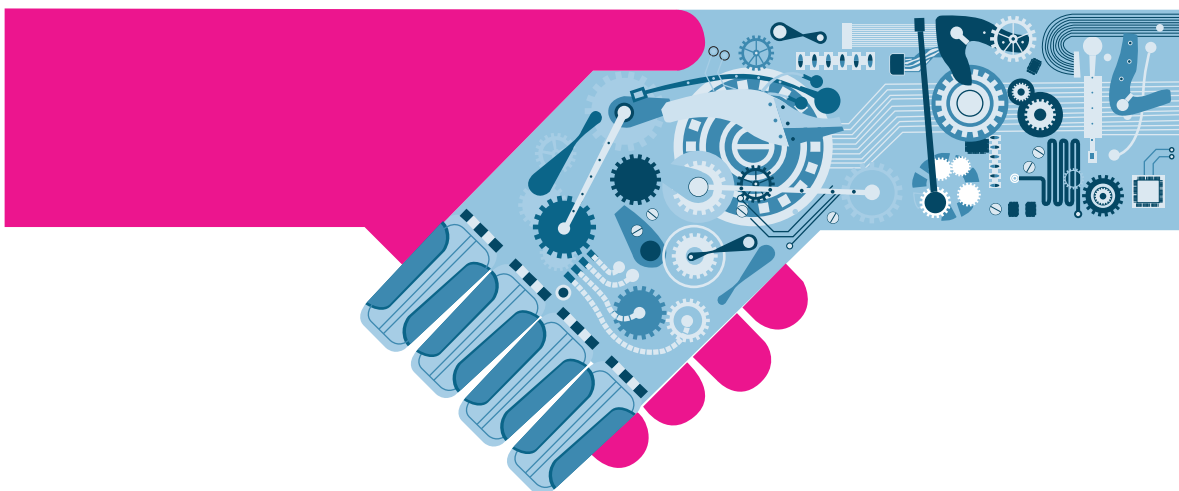


Dirty data enters your marketing automation platform even more often than your CRM. For instance, if you have a web form built in Marketo, leads will enter their information into that form. Let's say a contact completes a Marketo form one month ago. Today, that same contact submits another web form with a different email address. This creates a duplicate in Marketo.

With these two email addresses for one person, Marketo is going to send two records into Salesforce. A duplicate prevention platform will not only check Marketo, but it will check Salesforce and find that month-old record. Instead of

creating a duplicate, it will merge it with the record in Salesforce and the record in Marketo.

Imagine if instead of an email, that contact from a month ago entered their first initial and last name. A month later, that same contact entered "first name.last name". You can still configure your data quality platform to overwrite or only update a blank field, which will combat that issue. By default, your duplicate prevention tool will keep the original email address and archive the new one coming in.



HOW DUPLICATES HAPPEN

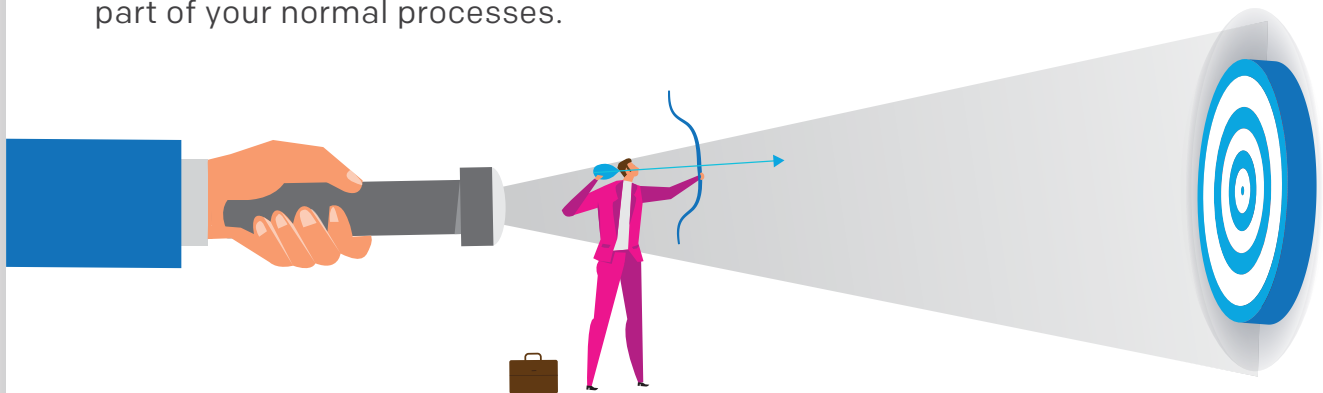
Using a Webhook, you can connect your duplicate prevention tool to Marketo via a basic workflow step.

With Marketo, you've got some configuration options.

You can create a custom field to be used in a flow that will tell Marketo it's okay for you to create a new lead in Salesforce. Since we've already prevented a duplicate and merged them in Marketo, Marketo can simply create the new lead as part of your normal processes.

You can continue to use your lead validation, lead scoring, etc. with duplicate prevention. Once the lead is determined to not be a duplicate and it's qualified, Marketo will send it over to Salesforce.

The process is similar for other marketing automation platforms as well. At the end of the day, it's important to note that with this process in place, you're preventing the duplicates in marketing automation as well as your CRM.



LEAD SCORING AND LEAD ROUTING

Marketing automation allows you to score and route leads based on their activities and contact with your brand. For example, Marketo can increment behaviors, so if you have a lead score on a webinar registration form and another lead score on a whitepaper, you can assign a point value to those actions and increment a lead.

The lead score fields will update automatically, every time.

Of course, dirty data mucks up this process, making it harder to truly understand the behaviors of the lead and score appropriately. With clean data, you can accurately see the lead's journey and touch points, no matter what email address they enter or name they use.

CHOOSING A DATA QUALITY PLATFORM



When it comes to duplicate functionality, choose a platform that's easy to use and affordable.

A platform in the Cloud has many benefits as well, including fewer clicks, less pain, less hassle and less training.

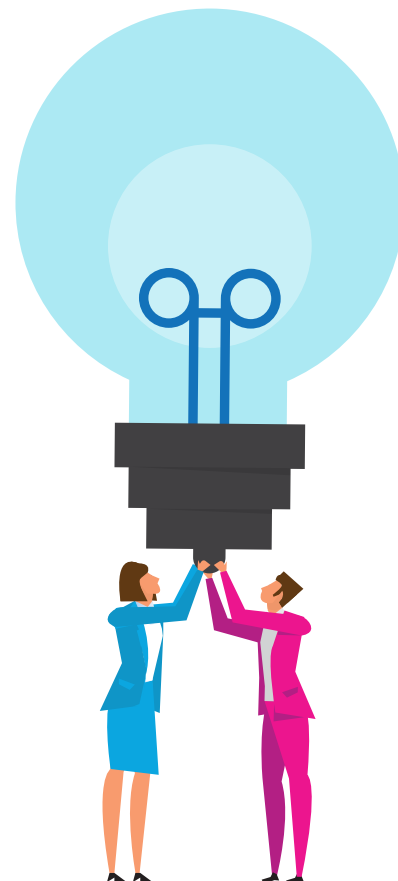
Having an all-in-one product makes your data quality process easier. The platform you choose should meet all the steps discussed in this ebook, including finding duplicates, deduping, prevention, and enrichment.

Whether you purchase all of the products at once or do it in stages, having it all come from one vendor will make the implementation process easier.

Choose a vendor that takes a proactive approach to your duplicate problem. Stray from a vendor that waits until the duplicates are already created and then hunts them down.

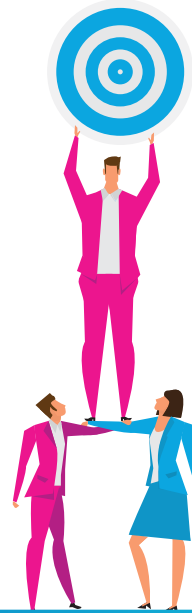
This is double the work and a waste of time. Automatic duplicate detection, or detection as you type, will avoid unnecessary steps, time and costs.

Your data quality vendor should prevent all methods of bad data entries including manual entry, uploading lists, web forms, or another avenue. Flexibility is the name of the game in prevention.



CONCLUSION

While there's no silver bullet for clean data, the best approach is having strong knowledge of data quality, as well as a reputable data quality vendor to properly data cleanse and get your prevention products in place.



Backed by patented technology, RingLead's Data Management Solution (Ringlead) is the only cloud-based end-to-end data management solution on the planet that provides 360o care for your CRM and marketing automation system. Within Ringlead your team can clean, dedupe, normalize, protect, and ENRICH your data.

WHAT'S INSIDE RINGLEAD



Automate data quality within your CRM with our deduplication task scheduler found in Ringlead Cleanse. Use 55+ custom matching logic rules to identify and merge duplicates based on your company's unique needs.



Prevent duplicates for being created through web forms, manual entry and list uploads using Ringlead Duplicate Prevention.



Add direct dials, mobiles and social links to your key leads, contacts and accounts in real time using Ringlead Enrichment.



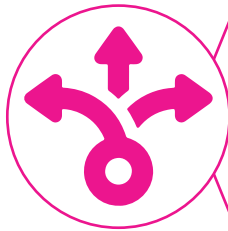
Discover, capture and import quality leads in seconds using Ringlead Capture.

Ringlead addresses the demand for a product that bridges the gap between sales leaders and marketing executive by providing clean, rich data, and flawless integration.

For a free personalized demo of Ringlead, give us a call at +1 (888) 240-8088 or [click here](#).

DMC DUPLICATES PREVENTION

The best way to get rid of duplicates is to prevent them from being created.



Manually enter new data without creating duplicates

Prevent duplicate from web forms with an intelligent Forms Manager

Upload lists of any size without creating duplicates



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