



ONE

VS

Ten Vendors

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INTRODUCTION & MISSION

Finding and selecting an enterprise data quality vendor to manage data, getting the technology operational and then managing that vendor relationship encompasses a large number of factors. ***What are the costs? What are the efficiencies? What are the hidden factors?***

OUR GOAL

We want to connect with you on a level where you say ***“wow, I get it!”***

When the “aha” moment hits...

START TODAY!

Nothing in this paper is something that you wouldn't figure out yourself if you sat down and thought it through. But who has the time while you're running your business?

This paper is not just for data management. The concepts can be applied in many areas to bring efficiency to your business. It's a crazy world out there and there are many single function point vendors who do a great job at a one thing. However at what cost? We will dive deep into data management and look at the real costs associated with the vendor relationship.

This paper will focus on the one vs ten concept. ***How does using one vendor really stack up versus using multiple or even ten separate vendors? Why ten?*** RingLead encompasses ten core features of data management which are available in a single SaaS platform.

To start out, there are three major categories of interaction. Each of which take time and resources away from day-to-day business operations. **They are:**

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COMMON TO ALL	SPECIFIC TO DATA MANAGEMENT	VENDOR RELATIONSHIP
Technology Discovery	CRM Connect	Technical Support
Technology Selection	Marketing Automation Connectivity	Product Feedback
Technology Acquisition	<i>Deduplication*</i>	Sales Support
Technology Deployment	<i>Data Enrichment*</i>	New User Training
Security Access	<i>List Import*</i>	Billing & Finance
User Management	<i>Web Form Submission*</i>	User Documentation
User Training	Data Segmentation	Security
	Data Dictionaries	Product Notifications
	Scheduling	
	Reporting	
	<i>Lead Connection*</i>	
	Data Quality Protection	
	<i>Duplicate Prevention*</i>	
	<i>Normalization*</i>	
	Transparent Data Fill Rate	
	<i>Lead Routing*</i>	
	<i>List Storage*</i>	

COMMON TO ALL - These are process steps that have to be done with any technology. In this case it does not have to be data management technology. It could be a financial management system, project management, human resources or any enterprise related technology. This category starts with discovering potential technology solutions, selecting, acquiring the technology, granting system access, deploying the technology, user management and user training.

SPECIFIC TO DATA MANAGEMENT - These encompass core features, subfeatures and process steps that handle the entire scope of data management. Example features are Data Dedupe, Data Enrichment and Integrated List Import. Subfeatures are process steps that are required firmaments to support core features. Examples are CRM Connectivity, Marketing Automation system connectivity and Data Dictionaries. Process steps examples are scheduling and reporting.

VENDOR RELATIONSHIP - How do you interact with your vendor(s)? Do you use technical support, product feedback, sales support, access to product documentation, billing and finance, managing your security, user training and sales support? Each interaction takes time, but is necessary for an optimal experience.

FOR EACH MAJOR CATEGORY, THERE ARE MULTIPLE SUB ITEMS.

Here is a table of all sub items in each category. *In blue are the ten core features in RingLead's DMS platform.* For the **Common to all** and **Vendor relationship** categories, we will take a day-in-the-life approach. These categories will be applicable to any software vendor interaction and are not limited to data management.

RingLead is also a user of many technologies and you will probably have experienced some of the same things we have. For the **Specific to data management** category, we will take a deep dive into what RingLead offers.

02

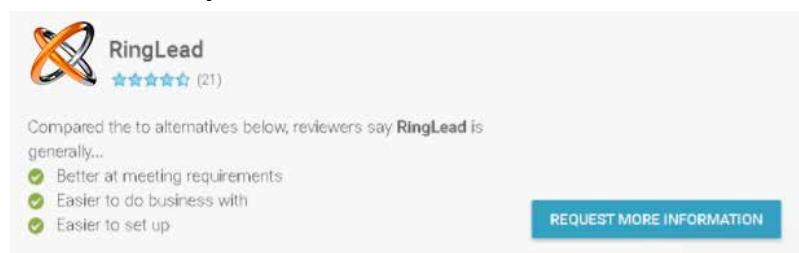
GENERAL

4

COMMON TO ALL

TECHNOLOGY DISCOVERY

There are thousands of products and just discovering a product can take hours. How do you search? How do you categorize? To save time there are great sites online that list multiple technologies, which are already pre-categorized. One site we recommend is G2Crowd, which is a crowd sourced technology rating review aggregate. With tech discovery, this can be done by a single researcher. **People: 5+**



TECHNOLOGY SELECTION - Depending on your organizational setup, this can be a single expert or a team of people. Within Data Management we usually see someone technical as well as someone from Sales or Marketing. The key piece here is that it's probably multiple people's time. **People: 3+**

TECHNOLOGY ACQUISITION - In come the finance people or a department manager with budget authority. Enterprise software usually requires managerial sign off. **People: 3+**

TECHNOLOGY DEPLOYMENT - With installed technology this can be cumbersome. With Software as a Service, it is typically as easy as getting login credentials. The real challenge is internally determining which people and departments should have access. **People: 3+**

SECURITY ACCESS - Modern systems like Salesforce and Marketo won't allow anything to connect to your data without

the right credentials. The right security credentials must be allowed. In addition, for SaaS software, the company firewall may be to allow access to a particular site. **People: 2+**

USER MANAGEMENT - Sometimes fights break out. Who gets access to the new software? Who will get the latest revenue producing widget? How do we determine this? Usually there's an ocean of opinions. **People: People: 2+**

USER TRAINING - Everyone who is going to use the software must get trained. **People: Everyone**

Disagree with the explanations? That's fine. The real point is that each of these necessary steps require people across multiple departments. You may have a combination of Operations and IT, but again, that is not the point.

STEP	WHO IT AFFECTS	DEPARTMENTS AFFECTED
Technology Discovery	Research, Sales, Marketing, IT	4
Technology Selection	Sales, Marketing, IT	3
Technology Acquisition	Sales, Marketing, IT, Finance	4
Technology Deployment	IT, Marketing, Sales, Operations	4
Security Access	IT, Operations	2
User Management	Sales, Marketing	2
User Training	Sales, Marketing, Operations	3

Before we dive into the math of one vendor vs. ten, we should also look at the attributes of the vendor relationship. For the sake of easier math moving forward, even though RingLead has (10) core data management features, we will assume that RingLead can replace (5) separate vendors as some vendors do one or two features.

VENDOR RELATIONSHIP

This entire section's theme:

A team vs. multiple disconnected individuals.

TECHNICAL SUPPORT - Do you have a single number to call? Do you have a single team that understands your business needs? Do they know how all 10 functions should work together? Do they all have access to the same CRM with notes on your company? Every company loses people but when you have a support team, you will always have consistency.

PRODUCT FEEDBACK - We have it built in. Get your ideas to our product manager. There's no reason to ask if we can work with another data system. RingLead has it all covered.

SALES SUPPORT - If your five vendors were going to call you every month to see how everything is going, do you want five calls, or one? Does sales even regularly check in with you to see how it is going?

NEW USER TRAINING - With five places to bookmark documentation, there's five potentially disconnected systems that only talk about how they work with no mention of how to work with other systems. RingLead DMS is a consolidated, single system. New user training is different than initial user training. We will know how ALL your configurations work and bring the new user up to speed on your customized environment.

BILLING & FINANCE - One number to call, one place to pay. You will benefit from cost savings as we don't have to duplicate five teams of people.

USER DOCUMENTATION - One place to go where all the main features are designed to work together.

SECURITY - If you have five vendors, have they all passed a security assessment?

If even one of your vendors has less than optimal security, your data is at risk. RingLead is certified to the highest industry standard from MainNerve.

PRODUCT NOTIFICATIONS - We all secretly hate email. RingLead delivers notifications right inside the DMS product. You have one place to go to learn about all the updates in the DMS platform.



VENDOR RELATIONSHIP - SUMMARY

Regardless of the technology, if you can consolidate your vendors, you will save time and expense. It is a known fact that companies can deliver better service for a lower price by solving more problems than disconnected point solutions.

Two examples of the most successful consolidated systems in software industry.

MICROSOFT OFFICE, Microsoft Corp, is an integrated suite of business software applications for Windows and Macintosh computers. Office includes word processing, spreadsheet, presentation graphics and email communication programs that provide functionality which is commonly used to run a business office.

CA UNICENTER, CA Technologies DSM (Desktop and Server Management) is an IT resource management solution that provides functionalities of Computer Associates' management products Unicenter Asset Management, Unicenter Software Delivery, and Unicenter Remote Control.

FOOTNOTE:

Russ Artzt is the co-founder of CA Technologies and currently in charge of product at RingLead. Russ is leading the charge building the RingLead DMS platform.

@Rachel Show (2) pictures to contrast, let the reader make the connection Russ is building the next platform

Russ at CA
Russ at RingLead



03

DATA MANAGEMENT

8

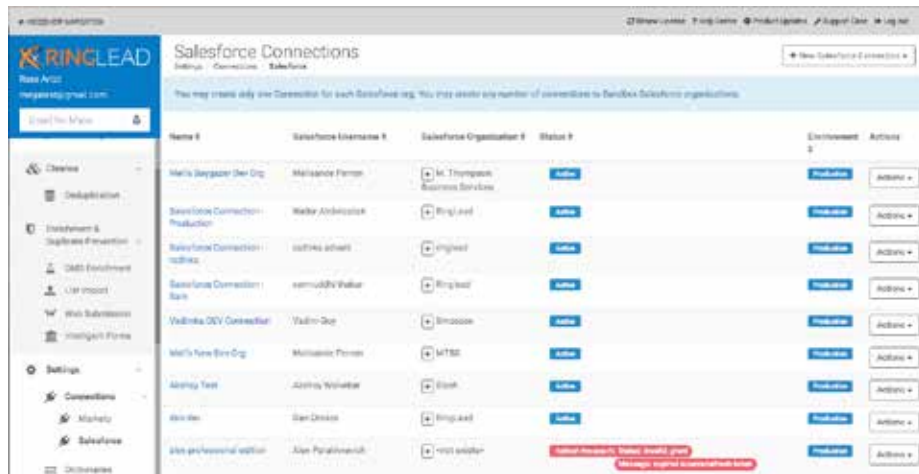
3.1 SYSTEM CONFIGURATION

CRM CONNECTIVITY & MARKETING AUTOMATION

CONNECTIVITY - Any platform that connects to an external system such as Salesforce or Marketo will have to be configured. To use any of the 10 core data management features in RingLead DMS, this is to be done only once.

Since the connection only needs to be setup one time, all future enhancements would also work with the data target. This includes setting up the CRM and Marketing Automation connections.

SALESFORCE CONNECTION IN RINGLEAD DMS



The screenshot shows the 'Salesforce Connections' page in the RingLead DMS. It features a table with columns: Name, Salesforce Username, Salesforce Organization, Status, Environment, and Actions. There are 10 rows of connections, each with a 'Production' status and an 'Actions' button. A sidebar on the left contains navigation links like 'Connections', 'Marketing', and 'Salesforce'. A top navigation bar includes links for 'Home', 'Connections', 'Product Updates', 'Support Center', and 'Logout'.

Name	Salesforce Username	Salesforce Organization	Status	Environment	Actions
Marla Bergner Dev Org	MarlaBergner	Marla Thompson Business Services	Active	Production	Actions
Salesforce Connection - Production	Walter Anderson	RingLead	Active	Production	Actions
Salesforce Connection - Test	Walter Anderson	RingLead	Active	Test	Actions
Salesforce Connection - Dev	Walter Anderson	RingLead	Active	Dev	Actions
Veeva CRM Connection	Veeva Dev	Emerson	Active	Production	Actions
Marla Bergner Dev Org	MarlaBergner	Marla Thompson Business Services	Active	Production	Actions
Marla Bergner Test Org	MarlaBergner	Marla Thompson Business Services	Active	Test	Actions
Marla Bergner Dev Org	MarlaBergner	Marla Thompson Business Services	Active	Dev	Actions
Marla Bergner Test Org	MarlaBergner	Marla Thompson Business Services	Active	Test	Actions
Marla Bergner Dev Org	MarlaBergner	Marla Thompson Business Services	Active	Dev	Actions

MARKETO CONNECTION IN DMS



The screenshot shows the 'Marketo Connections' page in the RingLead DMS. It features a table with columns: Name, Username, API Only User, Created, and Actions. There is one row of connection with a 'Production' status and an 'Actions' button. A sidebar on the left contains navigation links like 'Connections', 'Marketing', and 'Salesforce'. A top navigation bar includes links for 'Home', 'Connections', 'Product Updates', 'Support Center', and 'Logout'.

Name	Username	API Only User	Created	Actions
Marketo Connection	Walter Anderson	RingLead	Nov 17 10:10 AM	Actions

DATA DICTIONARIES - Data dictionaries provide flexibility for specialized business processes. Your business may have unique terms that you consistently use. Building a centralized data dictionary in RingLead DMS means you only have to perform the process one time and all data functions can make use of your specialized terminology.

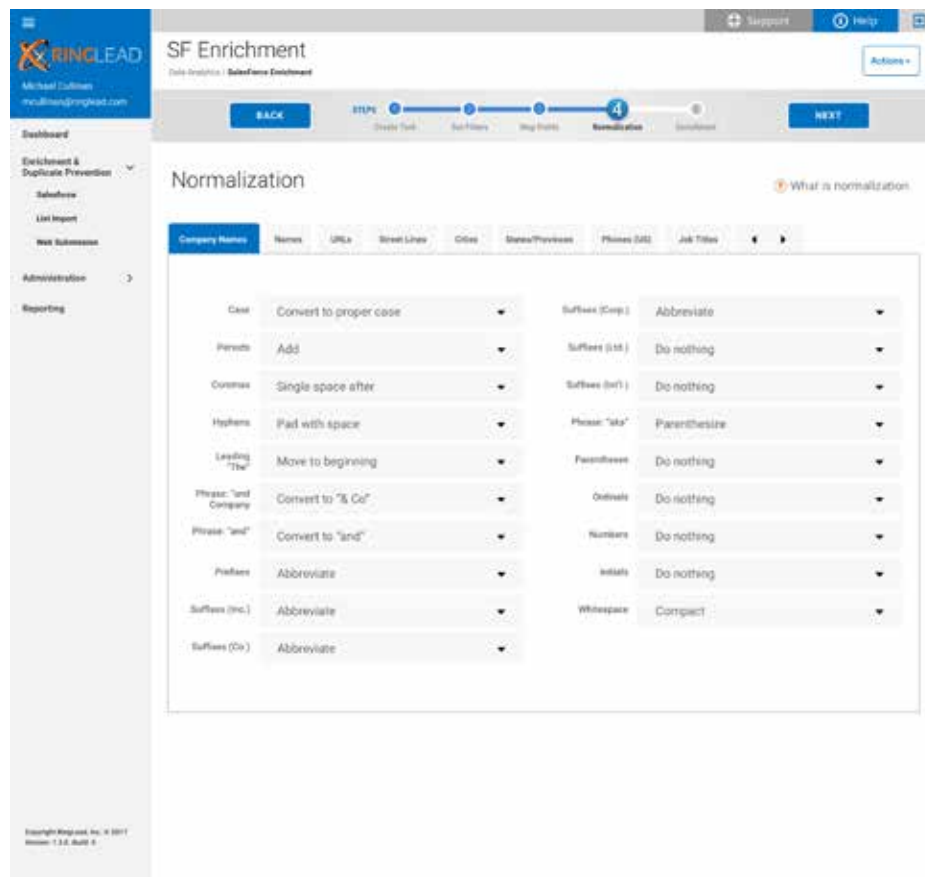


The screenshot shows the 'Dictionaries' page in the RingLead DMS. It features a table with columns: Name, Replace Values Family, and Actions. There are 10 rows of dictionaries, each with a 'Production' status and an 'Actions' button. A sidebar on the left contains navigation links like 'Connections', 'Marketing', and 'Salesforce'. A top navigation bar includes links for 'Home', 'Connections', 'Product Updates', 'Support Center', and 'Logout'.

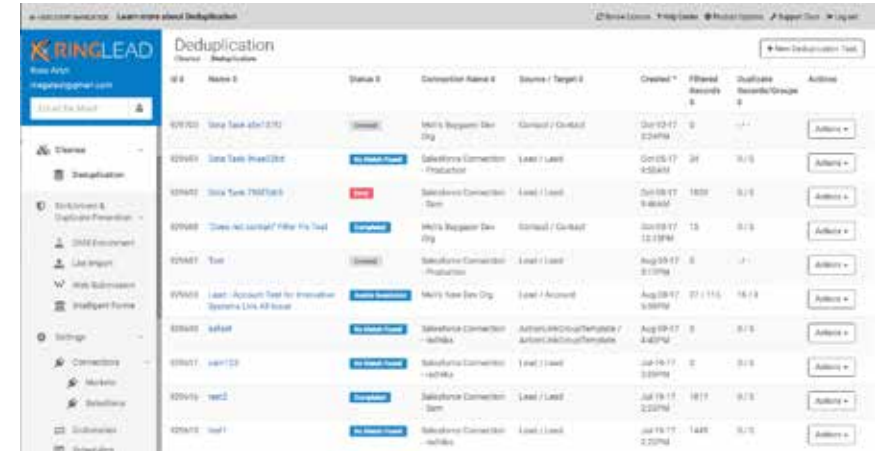
Name	Replace Values Family	Actions
Lead Address Cleaner	Address Cleaner	Actions
Company Names	Company Names	Actions
Names	Names	Actions
Phone	Phone	Actions
Test	Test	Actions
Test Address	Test Address	Actions
Test Email	Test Email	Actions
Test First	Test First	Actions
Test Last	Test Last	Actions
Test QA	Test QA	Actions
Test Title	Test Title	Actions

3.2 THE TEN CORES OF DATA MANAGEMENT

1. NORMALIZATION - Normalization comes first in any data management function. Once it is set up, your chosen normalization scheme is available everywhere in RingLead DMS.



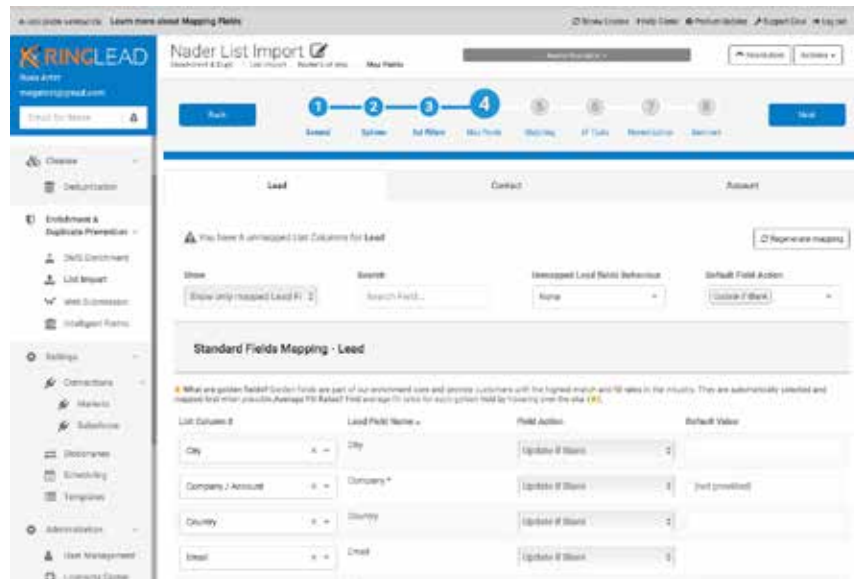
2. DEDUPE - RingLead leads the industry in deduplication. It starts with setting filters that can also be used globally across DMS functions. Once data is selected, matching logic is defined and data can be deduped immediately or scheduled on a regular interval.



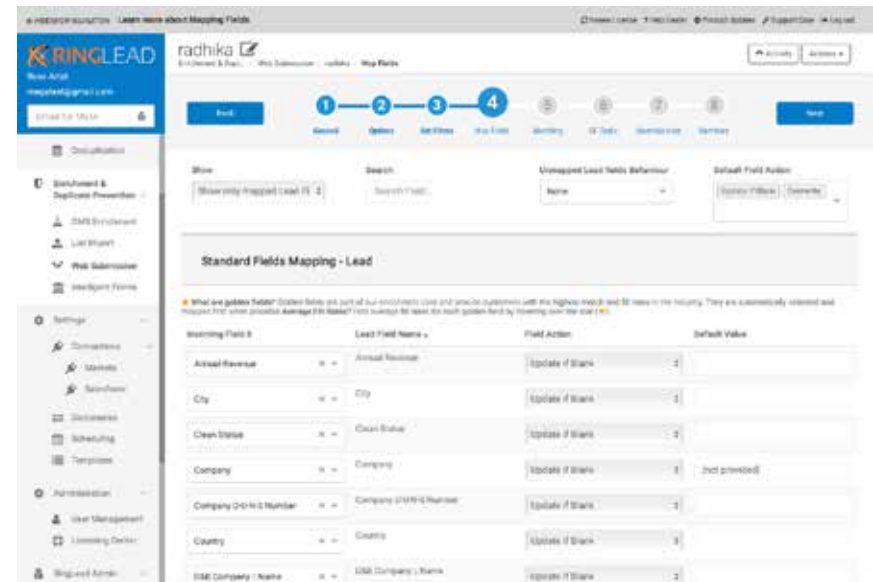
3. DATA ENRICHMENT - No need to set filters again, since RingLead DMS is a consolidated platform, you can borrow from work done in other areas. Filters and normalization should already be done. Only mapping fields would be needed and your data enrichment could commence enrichment.



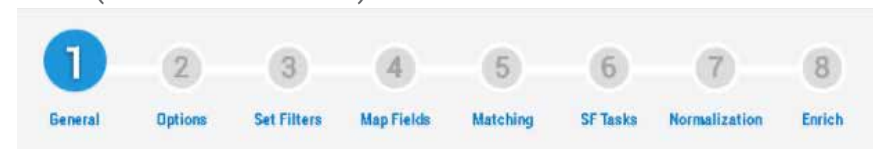
4. INTEGRATED LIST IMPORT - Integrated List import leverages Filters, Map Field, Matching and Normalization that are used in other areas in RingLead DMS. The only new configuration needed in list import would be setting up your tasks in Salesforce.



5. WEB FORM SUBMISSION - At this point, all the major configuration is already done and shared across the consolidated interface in RingLead DMS. A user would have to add to do some configuration to connect your web forms, but Filters, Field Mapping, Matching, SF tasks and Normalization are already configured. Web forms can work with both your CRM and Marketing Automation system.



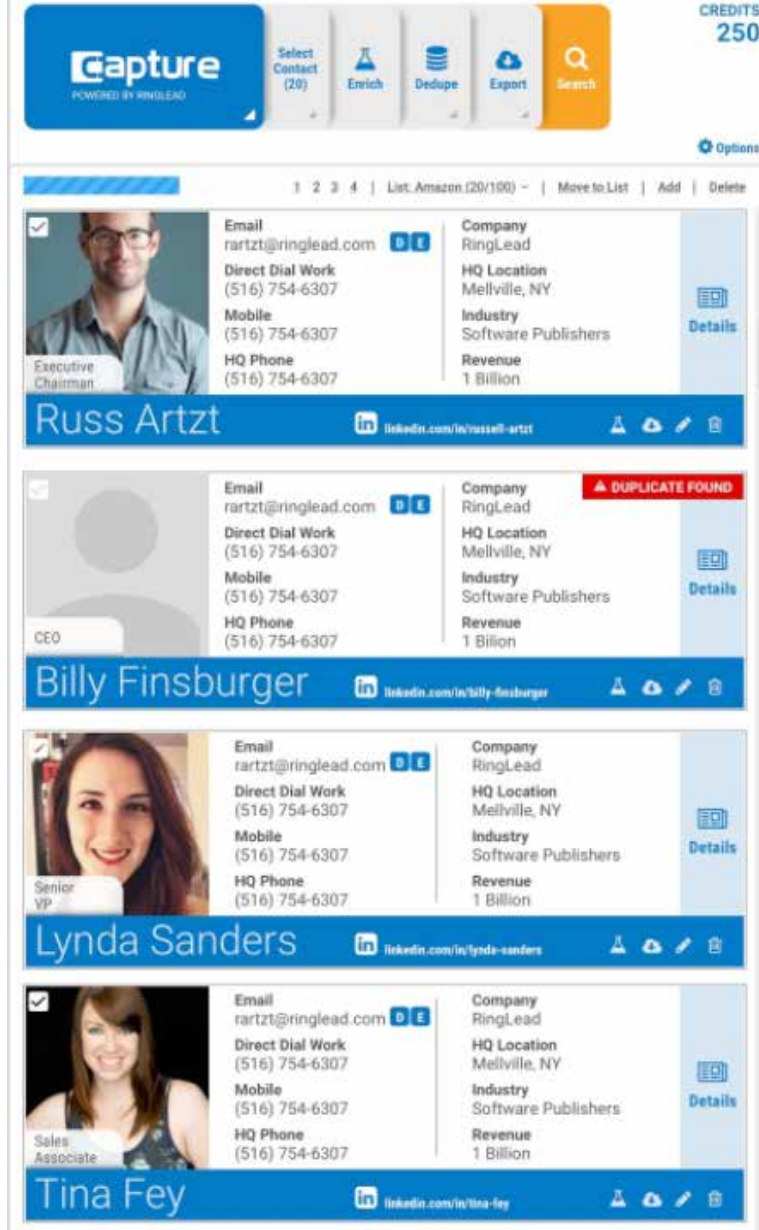
CRM (Salesforce shown)



Marketing Automation (marketo shown)



6. DATA SEGMENTATION - Sending the same email to every person on your list is a rookie marketing move. If this is happening, then get your marketing leader some coaching. In most cases when presented with the ability to segment data, savvy marketers will adopt it and never go back. Segmented and targeted marketing campaigns yield 10 times the response rates. Does the Vice President of Sales have the same triggers to their attention as a standard sales rep? Definitely not. RingLead DMS will allow your marketing team to segment by Account firmographics such as Industry and Revenue or contact attributes such as title level or title department. Having Title Level and Title Department is the first step to defining target roles. A role is a designation such as “Top Marketing Contact.”









Capture POWERED BY RINGLEAD




Select Contact (29) Enrich Dedupe Export Search







CREDITS 250




Options


1 2 3 4 | List: Amazon (20/100) | Move to List | Add | Delete







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 Company: RingLead
 HQ Location: Melville, NY
 Industry: Software Publishers
 Revenue: 1 Billion







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 Revenue: 1 Billion

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 HQ Location: Melville, NY
 Industry: Software Publishers
 Revenue: 1 Billion

7. LEAD CAPTURE - RingLead DMS comes with DMS Capture, a tool that collects contact data from any source including email signatures, management pages, spreadsheets and even social networks such as LinkedIn. Capture then uses real-time data append and adds missing fields such as email, phone number, direct dial phone, mobile phone, social network links, as well as account-level firmographics.

The screenshot displays the RingLead DMS Capture interface. At the top, there's a navigation bar with 'Capture' and 'Reports' tabs. Below this, a contact profile for 'Russ Artzt' is shown. The profile includes a photo, name, and various contact details. The 'CONTACT' section lists email addresses, phone numbers, and a work address. The 'COMPANY' section shows the company name, website, and industry. The 'SOCIAL' section lists various social media links. The 'BASIC' section shows the contact's title and role. The 'SALESFORCE IMPLICATES' section shows a list of contacts. The 'CAPTURE DUPLICATION' section shows a message that no duplicates were found.

8. LEAD ROUTING - Unless your existing data AND your new incoming data is normalized, deduped and enriched with both Contact and Account Data, then routing a new incoming lead to the correct location is a gamble at best. With RingLead DMS, your data is continually being segmented, cleaned, enriched, normalized and deduped. RingLead DMS will route data to the correct object and record, based on the rules that you define.

9. LIST STORAGE - Where is the latest Excel spreadsheet that you got from a trade show? Who's computer is it on? Is it in Dropbox, Box, Google Drive, OneDrive, or a local machine? What about the 50 other lists that your company collected over the last several years? What is the crossover of lists that you received from 20 different resellers?

BIG QUESTIONS. Why store Account and Contact data list in 10 different places when you can store them in one location?

ENTER RINGLEAD DMS CONTACT CLOUD (BETA). The Contact Cloud is a single place to store all your lists. Never lose another list or spend half an hour looking for where you stored it. With Contact Cloud, you can save all your lists in one location and make them accessible to anyone that you want to have access. Best of all Contact Cloud is treated exactly like an object like Leads, Contacts or Account. Every RingLead DMS function can immediately be used to normalize, dedupe, segment and enrich a single list or a combination of lists.

The 5 D's of Account Based Marketing



DEFINE
your high-value account criteria

DISCOVER
your ideal accounts & map your existing accounts

DEVELOP
tailored digital sales content for your accounts



SUCCESS!

DATA
always measure the ROI from your activities

DEPLOY
coordinate outboard & inbound programs across your ABM & reach your targets

10. DUPLICATE PREVENTION - Your data is clean. Imaging that! However, don't forget that your sales reps can enter data into your CRM. What happens when they type in a new duplicate? Don't worry. RingLead DMS has a Salesforce extension called "Unique Entry." Unique Entry warns your sales rep in real-time as they are entering a duplicate.



3.3 SUPPORT FUNCTIONS

CLEANSE SCHEDULING - In data management, the power of scheduling is to support your business cadence. An example being a dedupe process running every night on new data entered within the last 24 hours. Every business runs differently. Scheduling gives the user the flexibility to schedule powerful operations that match the individual business needs.

Schedule: Data Task a5e137f2

☒ Schedule enabled ☒ Do not update Salesforce records. Check this box to Review on the Resolution page before updating Salesforce.

☐ Daily
☐ Hourly
☒ Weekly
☐ Monthly
☐ Once

Choose the Day → M T W Th F Sa Su

Choose the preferred Time → 12:00 am

Scheduling

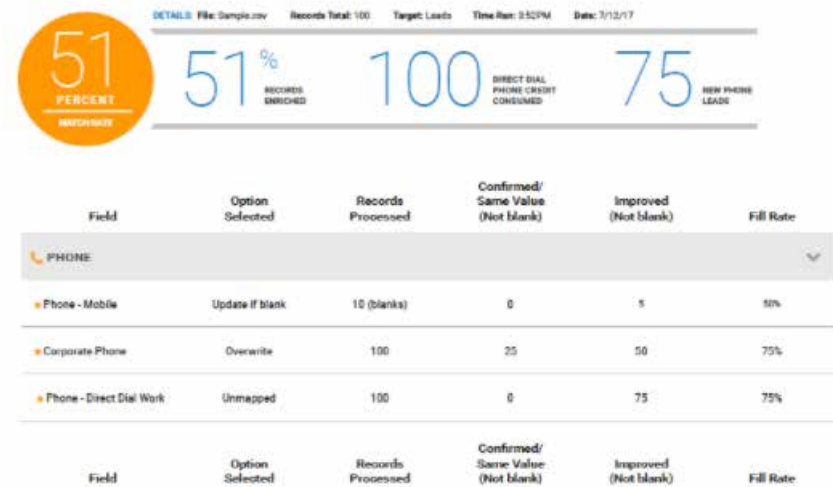
Settings / Scheduling

Name	Type	Summary
DedupeHR	Deduplication	Every hour (Run->Review Only)
Deduplication-RingLead Internal	Deduplication	Every hour (Run->Review Only)
Lead-Lead- Strict	Deduplication	Every week at F 4:00 by UTC (Run->Review Only)
Lead-Account	Deduplication	Every week at Th 4:00 by UTC (Run->Review Only)
DedupeHR	Deduplication	Scheduling disabled

REPORTING - How many new leads were enriched in the last 30 days? What is the current size of my salesforce Lead, Account or Contact objects? How many companies are in the CRM are over \$100 million in revenue? RingLead DMS provides a pre-built dashboard as well as the ability to run reports on one of your most important assets; your data.



Direct Dial Phone Package Report



04

COMPETITIVE LANDSCAPE

17

DATA SCIENCE: THE TEN CORES OF DATA MANAGEMENT

										
	RINGLEAD	Informatica	CRMFusion	Cloudingo	ZoomInfo	Reachforce	LeadSpace	Lean Data	Discover.org	Egrabber
NORMALIZATION	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗
DEDUPE	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗
DATA ENRICHMENT	✓	✓	✓	✗	✓	✓	✓	✓	✗	✗
INTEGRATED LIST IMPORT	✓	✗	✓	✓	✓	✓	✗	✗	✓	✓
WEB FORM ENRICH	✓	✓	✗	✗	✓	✓	✗	✗	✓	✗
DATA SEGMENTATION	✓	✓	✓	✗	✓	✓	✓	✓	✓	✗
LEAD CAPTURE	✓	✗	✗	✗	✗	✗	✓	✓	✗	✓
LEAD ROUTING (ABM)	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗
DUPE PREVENTION	✓	✓	✓	✓	✗	✓	✗	✗	✗	✗

DATA MANAGEMENT EFFICIENCIES

SAAS	✓	✓	✗	✓	✓	✓	✓	✓	✓	✗
SINGLE SIGN ON	✓	✓	✗	✓	✓	✓	✓	✓	✓	✗
CENTRAL USER ADMIN	✓	✓	✗	✓	✓	✓	✓	✓	✓	✗
DATA DICTIONARIES	✓	✓	✓	✗	✗	✗	✗	✓	✗	✗
SCHEDULING	✓	✓	✓	✓	✓	✓	✗	✗	✓	✗
REPORTING	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗



05

SINGLE VENDOR EFFICIENCIES

THERE ARE **TWO MAIN FACTORS** THAT AFFECT EFFICIENCIES IN DATA MANAGEMENT:

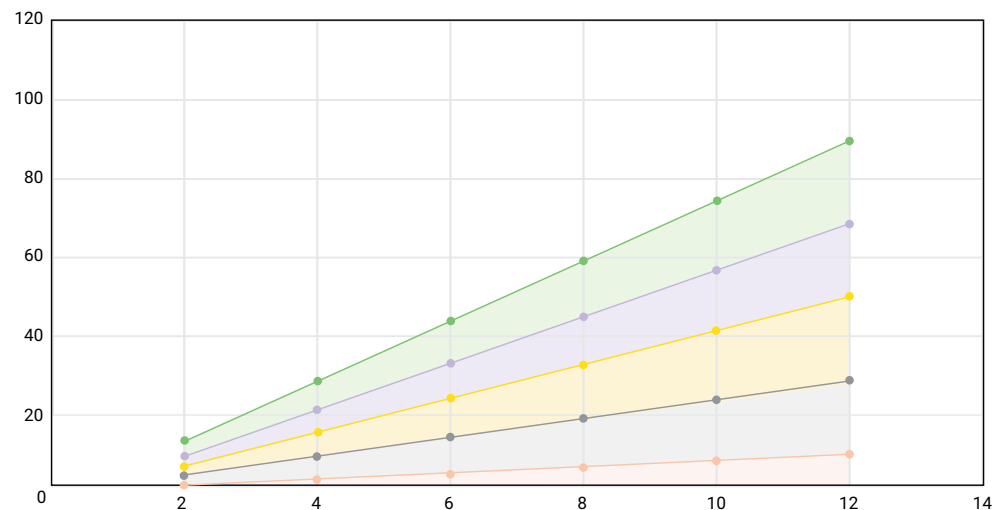
1. Vendor relationship
2. Data management capabilities

Regarding Vendor relationships, it is generic. When vendor consolidation happens and a single vendor can handle multiple problems, it is a good thing.

EXAMPLES:

Having one sales contact, one support contact and one billing contact as opposed to five or even ten, depending upon the number of solutions employed. There's direct correlation in the relationship complexity. If you have five vendors, you have 5 support numbers, 5 sales contacts, 5 billing contact's, etc.

VENDOR RELATIONSHIP COMPLEXITY



Y axis = Relationship complexity

THE DATA MANAGEMENT TECHNOLOGY SIDE IT IS NOT THAT SIMPLE. With 10 core features, the effect in adding additional vendors is not direct, but logarithmic. It is not just 10 core feature but 10 core feature that can each interact and cause issues in your data process.

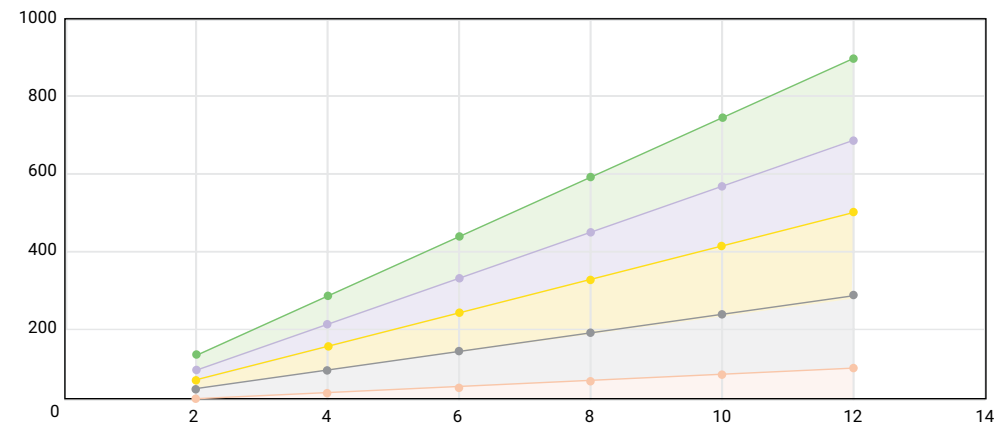
EXAMPLES:

If you are using five systems, you have to connect your CRM **five times**.

If you are using five systems, you have to add users **FIVE TIMES**.

If you are using five systems and each of the systems interact with each part of the other systems, you have 120 times the chance of one broken step in the process affecting other steps in the process. Sounds crazy, but it's a factorial problem. **The math: $(5 \times 4 \times 3 \times 2 \times 1) = 120$. That is the number of possible combinations of things that can break.** Chances are not every step interacts with every other, but let's look at a real world example.

DATA MANAGEMENT COMPLEXITY



Number of vendors

Number of vendors Y axis = Relationship complexity

HERE IS A DATA SCENARIO:

(1) Normalization, (2) Dedupe, (3) Enrich as core steps, with (4) Web form fill, (5) List Append and (6) Data Enrich as functional steps.

If Normalization breaks, then dedupe breaks. If Dedupe breaks, then Data Enrichment breaks. If Data enrichment breaks, Web form fill, List Append and Data Enrichment all break. What else?

(7) LEAD ROUTING FAILS.

This real world example has 7 factors with 24 areas of failure. $(3 \times 2 \times 1) \times 4$ target functions. Failure is much more likely across multiple vendors, each being used in a different way in a system that is not homogeneous. RingLead DMS provides a cohesive environment, where functional steps are designed to work together.

06

SUMMARY

The vision of data must be holistic in order to maximize efficiency from data processes. RingLead DMS delivers a modern SaaS platform that centralizes and standardizes the ten core principles required to power a seamless data platform.

To learn more about RingLead go to <http://ringlead.com/contact> and see our web forms in action or call us at

+1 (888) 240 - 8088



ABOUT THE AUTHOR:

Donato Diorio is a strategic advisor to RingLead and was the Founder/CEO of Broadlook Technologies, a company acquired by RingLead in 2015. Donato is the Data Scientist in residence at RingLead and is excited to be working with CEO, Chris Hickey and Executive Chairman / Head of Product, Russ Artzt to deliver RingLead DMS: The all in one data management platform.