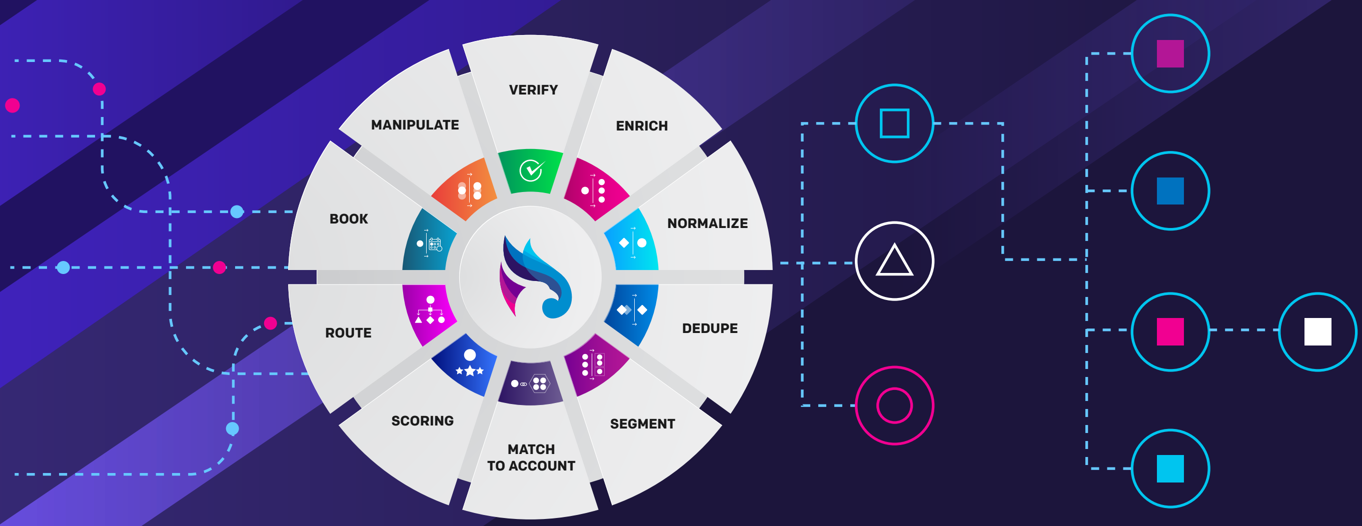
THE ULTIMATE GUIDE ON

LEVERAGING THE POWER OF DATA ORCHESTRATION

to Maximize Profits & Minimize Go-to-Market Friction



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Chapter 1.

The Unrealized Potential of Data in Modern Business

Half of the Fortune 500 have disappeared over the past two decades. Digital disruption has played a critical role in accelerating bankruptcies, mergers, and acquisitions.

Four technologies have been changing the way businesses operate in the digital age: cloud computing, artificial intelligence, the Internet of things, and big data.
Successful companies leverage these technologies to accelerate innovation and capitalize on opportunities to create economic value.

Big data, in particular, is a result of the emergence of other technologies. As digital technologies continued to evolve through the early 2000s, so did the number of connected devices. And two decades later in the 2020s, all of these connected devices are creating increasing amounts of data.
In fact, 2.5 quintillion bytes of data are generated every day around the globe.
And the speed at which data is being generated continues to rise. In fact, 90% of the world's data was created in the last two years.

The challenge, therefore, is not the creation or availability of data, but rather making it useful and actionable. Based on their research, IDC and Seagate estimate that 43% of the data captured by enterprises remains unused. To compete in today's business landscape, companies are making revolutionary changes to mission-critical processes that depend on data.

Lifeblood of the Sales & Marketing Revenue Engine

It's common to hear that employees are the most vital asset of a company. And it goes without saying that customer success is tantamount to revenue growth.
The third piece of the puzzle? Data. Data provides people with information needed to discover insight about new business opportunities, identify product-market fit, and fuel multichannel marketing strategies. Data enables smarter, faster decisions.
Picture data as the input, and actionable insight is the output that leads to results. A positive feedback loop is created when the process as streamlined. This is the essence of data-driven decision-making.

- **Data** are raw numbers, facts, and figures.
  E.g. Customer account "Family Friends Inc" has a NAICS code of 3111.

- **Information** is structured data, aggregated into contexts.
  E.g. Segmenting all customer NAICS codes, it's apparent 34% of the customer base is in the manufacturing industry.

- **Knowledge** is awareness and understanding of information.
  E.g. Executives realize they're having success serving manufacturing companies (or perhaps other industries are being neglected).

- **Insight** is leveraging knowledge and connecting it to create valuable ideas.
  E.g. Given that there's been success selling into the manufacturing industry, and that the total addressable market of manufacturing is massive, the annual plan should include a new, specialized sales team to focus solely on the manufacturing industry.

- **Action** is putting insight to use.
  E.g. Marketing launches a campaign with hyper-targeted messaging for the manufacturing industry, develops new sales enablement tools, the sales team expands their territories, and the business experiences verticalized revenue growth.

Data is the lifeblood of the sales and marketing revenue engine. Better data management leads to better results. This is why we developed a guidebook: to help you make the most of your sales and marketing data and provide you with guidance as you navigate the technology landscape to determine the best solut ion for accelerating the transformation of data into actionable insights.

The intent is to equip you with ideas you can use to answer three fundamental questions:

- "What do my go-to-market teams need to compete in the 21st century?"
- "What are the opportunity costs of settling for the status quo?"
- "How can technology help the business meet its goals, and, at the same time, how can it advance my career?"

The Go-To-Market Challenge

Executives and sales and marketing teams are expected to get new products and services into the hands of customers and increase revenue year-over-year, while adapting to market changes and customer preferences. Complex go-to-market (GTM) strategies, including buyer persona development, account-based planning, omnichannel tactics, and sales territory modeling, all depend on high-quality data for effective execution. Being able to make sense of the high volumes of data, and the speed at which it is created, is vital to business growth.

But according to Gartner research, 40% of all business initiatives fail to achieve their targeted benefits because of poor data quality.
At the same time, customer relationship management platforms (CRM) like Salesforce are expected to be the source of insight for sales and marketing teams.

Sales opportunities and leads are sourced from a variety of channels, including social media, events, partners, websites, and third-party data vendors. The faster these leads are processed, the more likely they are to advance through the sales funnel. A research study sponsored by XANT/InsideSales.com found there's a 21X increase in the chance of a lead being qualified if a salesperson responds within five minutes compared to 30 minutes. Companies that don't act quickly risk losing deals to the competition. Therefore, lead routing is a crucial process.
There is a close correlation between company performance and its ability to turn data into actionable insights, and this will only become more prominent as customer expectations evolve and GTM strategies become more complex.

While data is becoming more ubiquitous at increasing rates, companies are finding it difficult to extract the value. *Why is this? The quality of their data is poor, and the technology needed to clean, analyze, and automate it is either missing or insufficient*. There are three main types of data quality issues.

The Three I's of Data Quality Issues

Duplicate leads are a nightmare. They waste time, cost money, and create friction. But they're not the only kind of data issue, and they might not even be the biggest problem. One of the major challenges with data is having to clean it or append new data points before moving it through the system. Data may go stale or become outdated quickly as people get new jobs or roles. To get results out of data, people and processes must be able to act on it. But that becomes impractical when the following three data quality issues are present.

1. **Incomplete Data**
2. **Inaccurate Data**
3. **Inactionable Data**

Incomplete Data

Incomplete data is when company, contact, or behavioral information is missing.

- Company data points include firmographics like company size, industry, NAICS code, annual revenue, geography, business model, etc.
- Contact data points include demographics like job title, job function, and management level, as well as details like phone numbers, email addresses, and social profiles.
- Behavioral data includes buyer intent signals like what a company is researching for an upcoming project, whether they've received funding or have made budget changes, as well as other information like website and email activity.

This data is necessary for designing and executing GTM strategies effectively. When data is missing, marketers don't have a clear picture of their target audience. And when salespeople don't have quick access to a lead's phone number, it slows them down. Missing behavioral data makes it difficult to prioritize who to target next.

Inaccurate Data

Inaccurate data is information that is wrong or outdated. For example, when an employee switches jobs, they'll get a new phone number and email address. This kind of data decay happens all the time and creates confusion.

Another type of inaccurate date is when it's unstandardized, inconsistent, not normalized, or unstructured. When people submit web forms to request more details, they often format their contact information in different ways. For example, one person may specify their company name as "Solar Sound LLC", but their co-worker might later submit their company name as just "Solar Sound". In this scenario, two different salespeople will often reach out to the prospect, not knowing they're from the same company, which gives off an unprofessional appearance. This same type of issue can occur with differing geography formats.
Third-party data providers tend to format data in different ways. For example, annual revenue might be listed as a number or a range in a text field.

Inactionable Data

When data points are missing or when they're inconsistent across records, it prevents data from turning into actionable insights.
When a salesperson encounters an incorrect record, they waste time having to fix it. Duplicate leads slow down the sales process.
Another example is when leads are not matched to accounts in the CRM. Let's say a salesperson has been managing the Solar Sound LLC account for a couple years. A new lead is created when someone from Solar Sound requests information about a brand new product. Because there's no lead-to-account matching, the salesperson isn't aware of the potential opportunity.

Inactionable data also manifests when information is siloed across different systems, including the CRM and marketing automation platform (MAP). Records living in disconnected applications are like missing puzzle pieces that make it difficult to see the complete picture.
All three kinds of data issues make it extremely difficult to establish a target audience.

Several factors can cause these data issues, including:

- Human error: typos, formatting California vs Cali, not checking for duplicates, etc.
- Business rules: lack of standardized syntax, misalignment, etc.
- Third-party vendors: inconsistent data schemas.
- Technology: siloed systems, hard-coded workflows, lack of sophisticated data automation tools.

Clean data is table stakes for go-to-market teams. And yet, companies are squandering valuable resources troubleshooting the discrepancies. According to a report by Forrester, about one third of analysts spend over 40% of their time sorting through analytics data before actually putting it to use for strategic thinking and decision-making.

When data is left to rot in the system, the monetary impact it has on the bottom line may or may not be immediately apparent to some organizations.

Here are the hard truths and potentially damaging effects of bad data:

Data Debt & The Financial Impact of Bad Data

Most executives wouldn't argue that bad data creates headaches and diminishes their company's ability to meet its goal. But the financial impact isn't always obvious, and more often than not, organizations are in worse positions than they realize.

Data debt occurs when a robust solution is not put in place to solve data quality issues. When business leaders defer remedies to the future or enact quick fixes, a kind of debt accumulates over time and consumes company resources. Serious business problems can propagate throughout the organization when data management is neglected, not to mention the money that's left on the table from not leveraging the value of data for revenue generation.

Understanding data debt and the financial impact of bad data can make it clear to executives just how much profit it's costing their businesses every year.

Cost of Quality & the 1-10-100 Rule of Efficiency

The cost of quality is the cost of providing poor quality products or services. Like data debt, it is the price an organization pays when it fails to identify and fix a quality-related issue, as well as the price it pays to use resources to troubleshoot.
Related to cost of quality is the 1-10-100 rule of efficiency. The rule, first developed in 1992 by management consultants George H. Labovitz, Ph.D. and Yu Sang Chang, states that preventing an issue from occurring can save 100X more than if nothing at all is done to fix the issue.

In the context of data management, it costs:

- $100 for each incorrect record when nothing is done to correct
- $10 to correct the record
- $1 to prevent the issue from happening in the first place

Using the 1-10-100 rule, you can calculate your cost of quality as one way to quantify your data debt.

Human Capital

Glassdoor, Forbes, and CNBC state that Data Scientists are among the highest paid positions available, and the demand for the role is continuing to grow.

This is an outcome of the large amounts of data available to companies and how they want to use it to make smarter decisions. The problem is, data scientists spend about 80% of their time cleaning data rather than creating insights.

This begs the question: What's the cost of high-paid employees spending time on low-value, administrative tasks? Rather than data scientists fixing incorrect records, cleaning up duplicate data, and performing manual ETL operations, their time would be better spent analyzing the data to provide strategic recommendations to management. There's an opportunity cost. And when more full-time employees are hired to make sense of customer data, it costs even more money. In addition, Gartner research shows that data quality affects productivity by 20%.

When salespeople aren't productive, they don't meet their quotas, which means they don't hit their on target earnings. Bad data creates a frustrating experience, which can contribute to employee-turnover.

Email Reputation

Sending email with data discrepancies or irrelevant messaging causes unsubscribes, and when email opt outs aren't managed properly, unsubscribes can turn into complaints.

Legal Risk

Government data regulations and privacy laws like the European Union's General Data Privacy Regulation (GDPR), Canada's CASL, and the California Consumer Privacy Act (CCPA) create a burden on organizations to ensure the data they maintain is accurate and secure. Messy databases pose a risk on compliance as it's difficult to manage customer data. For example, when personally identifiable information (PII) is scattered across multiple records (duplicates), it's nearly impossible to comply with the multitude of regulations, such as managing email opt out preferences or providing proof of explicit opt in, or honoring "requests to be forgotten."

Bad data poses a legal threat. Failure to comply with the growing number of regulations can bring about fines and lawsuits, ranging from thousands of dollars to millions of dollars for enterprises that address large markets.

Word of Mouth

Customers are more likely to tell a friend when they have an unpleasant experience than when they have a good experience. Bad data ultimately affects the customer experience. For example, if the data doesn't show that a new lead record is actually an existing customer, an unknowing salesperson might reach out to kick off the sales process, which appears unprofessional. Or worse yet, two different salespeople call into the customer account.

Revenue Loss

There's a downstream impact as bad data slows down the sales cycle: deals are delayed because salespeople cannot easily find pertinent customer information. Or worse, deals are lost to competitors due to inaction or slow response time.

Indeed, 12% of revenue is lost at the average company because of inaccurate data. Businesses infected by bad data that don't take measures to correct it continue to put the company at risk of these financial threats. Meanwhile, they're exposed to the long-term consequences of invalid decision-making.
Bad data stifles business growth. It wastes time, increases costs, frustrates employees and customers, and hinders the ability to make smart, data-driven decisions. Ultimately, bad data is a major business problem that impacts the bottom line and creates friction throughout the organization.

Bad Data Creates Systemic Friction, Despite Its Potential

Every business has its unique challenges, but poor data quality is a common problem that affects multiple departments.
You want your CRM to boost productivity and be a reliable source of insight, but bad data is doing the opposite. Lead assignment issues, duplicate records, missing information, lack of buyer intent signals, and fragmented systems prevent go-to-market teams from meeting company goals and quotas.
Without robust technology, systems, and processes to cleanse, enrich, normalize, de-dupe, segment, and route the data, information in the CRM and MAP is unreliable and diminishes employee performance. It's far too common to see the lead-to-cash process built on top of a house of cards.

> **Don't build your lead-to-cash process on top of a house of cards.**

Processes like lead qualification and pipeline management suffer, and the infamous divide between sales and marketing teams widens. Without an effective lead-to-account matching system, account-based strategies are an endless chase.
The result? GTM operations are siloed, and the CRM isn't the system of insight it was originally purchased to be.
Here are some examples of the negative effects from the perspectives of different departments.

Marketing

Bad data makes it challenging for CMOs to acquire new customers, expand into new markets, and grow the business. Lead and opportunity pipeline goals are not met when the company cannot identify and reach best fit targets for their GTM strategies. Why? Because poor-quality data makes it infeasible to segment the marketing database into precise targets.
Audience targeting is a critical part of any marketing strategy. But precise targeting is impossible when there are so many incorrect records spread throughout the database. When vital information like firmographics, demographics, and behavioral data points are missing, it creates a problem when targeting at both the company-level and contact-level.

- **Company-Level Targeting**
  How can we expect the marketing team to identify which verticals to focus on when data for the industry field is missing or inconsistent?
  Buyer segmentation is a major struggle without accurate and complete data. It's difficult to map the slew of NAICS and SIC codes to industry picklist values in Salesforce. Just in the Manufacturing industry, there are over 20 subsectors, each with their own code.

- **Contact-Level Targeting**
  How is it possible to distribute tailored messaging when buyer personas are not accurate?
  When data points like job title or department are missing or inconsistent, a major portion of the database is not captured in buyer persona segmentation, which means campaigns are not reaching enough people.

- **Account-Based Marketing & Sales**
  Matching leads to accounts in Salesforce is a prerequisite for account-based strategies. Without it, leads often slip through the cracks and marketers get frustrated with the sales team, which creates even more friction.

  Lack of contextual information makes it a struggle for marketing teams to not only hit their targets, but also define the targets in the first place. Marketing teams are no longer responsible for just generating leads, but also play an important role in cross-selling, customer adoption, and retention. As much as the CEO encourages the entire revenue team to partner together on multiple go-to-market plans and sales motions, a system filled with inaccurate data and slow business processes makes it an unsuccessful endeavor quarter after quarter.

Sales

Sales directors struggle to analyze forecasts because they know the data in the CRM is incomplete. Instead of being able to make smart decisions, they spend time tracking down the numbers or waiting for sales ops to fix discrepancies.
One of the biggest problems with poor data management and automation is lead assignment. Without an intelligent routing strategy in place, leads get assigned to the wrong salespeople at the wrong time. Consequently, lead follow-up is delayed, despite there being a 21X decrease in lead qualification when response time is 30 minutes compared to five. Here are some scenarios sales directors will likely be familiar with:

- Duplicates are created, and multiple salespeople reach out to the same prospect (an awkward encounter).
- Inexperienced reps are given high priority prospects or leads from the wrong territory.
- Salespeople complain—and rightfully so—that they have to hunt for information they need in order to perform outreach, whether they're digging through the CRM or scouring the web.
- Meetings aren't booked on the calendar or prospects don't show up for scheduled conversations, which undermines inbound lead gen investments.
- Lead-to-opportunity conversion rates are below the numbers originally used to calculate the quarter's target.

Salespeople start their days with this thought: "Who am I going to contact today, and with what message?" But when the prospect data is not easily accessible in the CRM, in the right context, they get bogged down.

Quota-bearing account executives can't afford to waste time dealing with inefficiencies and mismatched records. Manual lead triage, data entry, and menial task administration hinder the sales team's productivity. Over time, sales reps distrust the CRM and view it negatively rather than a system of insight that can help them make money.

Customer Success, Service, and Support

Renewals. Product adoption. Upsell and cross-sell opportunities. These are all expectations that executives have of customer success managers—in addition to ensuring customers are happy, thriving, and getting the most out of the products and services they pay for. Similarly, service and support teams are tasked with solving customer problems quickly and building customer loyalty.

The question is, how does one know when it's the right time to reach out and attempt a cross-sell or renewal?

Accounts in the CRM that lack contextual data create blindspots for customer success managers, and renewal rates drop. Imagine getting on the phone to discuss a renewal without knowledge of recent account activity. Success, service, and support teams need customer intel, at the fingertips, to understand whether the customer is happy, if there's an active support issue, billing issue, or whether leads from the same company exist in the system. Organizations without a mechanism for matching leads to related accounts have limited visibility into potential cross-sell opportunities.

RevOps, CRM Admin, IT Manager

The proliferation of MarTech platforms and sales software has introduced new possibilities and time-saving opportunities. Most companies rely on multiple tools and systems that are intended to create efficiencies and boost productivity. But the sheer amount of integrations necessary to connect the systems can be overwhelming. Yet the CTO knows that someone has to make sure all the technology keeps running smoothly for everyone.
Operations leaders and technology managers have to juggle between multiple systems, fixing lead assignment issues for the sales team and catering to marketing's requests to make the data cleaner for better segmentation and targeting.

Connections between the CRM and MAP can be inefficient and slow down lead processing times. Data needs to seamlessly and correctly flow across all systems, otherwise silos pop up that result in the formation of incomplete, inaccurate, and inactionable records.
Trying to keep the overall sales and marketing engine running smoothly can feel like a game of whack-a-mole:

- Manually fixing duplicate leads—or relying on Salesforce's basic duplicate management—is technical grunt work that a high-paid CRM Admin shouldn't be wasting time on.
- Certified Salesforce Admins spend time putting out fires caused by inconsistent, inaccurate, incomplete data.

A routing strategy must be fueled by the right data in order to avoid painful delays, and ensure leads are assigned more precisely, more timely, and more efficiently.
What happens when data management is neglected for too long? Employees view the CRM as a burden rather than a system of insight, friction creates misalignment between departments, resentment festers, goals aren't achieved, and the overall terrible experience inevitably leads to employee turnover and customer churn.

To extract the full value of all the available customer data, organizations need a solution to avoid the above pitfalls and a strategy to turn the data into actionable insights.
The solution? Data orchestration. A well-thought-out data orchestration strategy—supported by sophisticated technology and smart people—is the secret sauce for turning your GTM obstacles into opportunities.

> **Capitalize on your data with a Data Orchestration strategy.**

Use this guidebook as your go-to resource for understanding why data orchestration is a necessity and not a luxury. And continue reading to discover ideas that will help you make an informed decision on what kind of technology will get the most value out of customer data, today, tomorrow, and for years to come.

Chapter 2.

Realizing the Value of Data Orchestration

Defining Data Orchestration in The Fourth Industrial Revolution

The competitiveness of today's business environment is not new. Companies rivaled against each other throughout the past few hundred years, just as they do today. Some disappeared while others flourished as they innovated their business processes and production techniques. Those that don't adopt emergent technology are left behind.

- During **the first industrial revolution**, which took place between the late 1700s and mid 1800s, the manufacturing industry evolved from producing products by hand to using steam power and mechanical devices. This had a widespread impact, increased standard of living, and propelled many companies forward.

- **The second industrial revolution**, which occurred in the late 1800s through early 1900s, built upon the first revolution with technological advancements including improved assembly lines, mass production, and the Bessemer steel process. This is the timeframe when Henry Ford introduced new efficiencies to the manufacturing industry.

- **The third industrial revolution**, known as the digital age—which began in the mid 20th century—saw progress from analog technology to digital electronics and led to the advent of personal computers and the Internet.

- Now, here we are at the beginning of the 21st century, in **the fourth industrial revolution**. We have the cloud, social media, mobile, IoT, and AI. We're living in a smarter, more connected world.

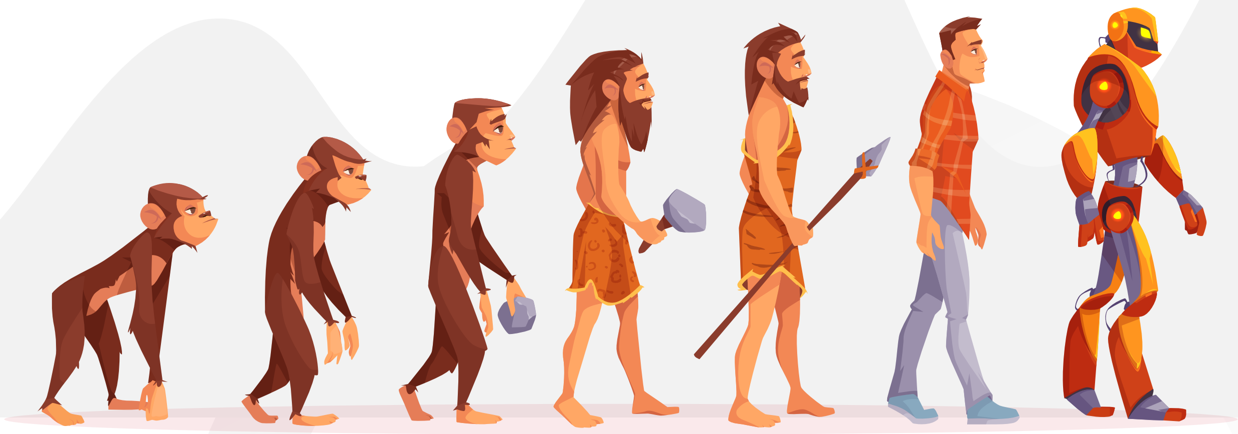
To this day, in the world of manufacturing and supply chains, more parts of the assembly line are being automated and controlled by smart technology, at scale. Intelligent machines are communicating with each other to streamline the flow of parts, self-diagnose issues and eliminate waste.

The interconnectedness of intelligent machines creates a synergistic effect that reduces operational expense and inventory costs while simultaneously increasing throughput.

Companies in diverse industries have made strides in the era of digital transformation as they leverage technology platforms to innovate and run different parts of the business, including:

- Customer Relationship Management (CRM)
- Marketing Automation Platform (MAP)
- Enterprise Resource Planning (ERP)
- HR Software
- E-Commerce & Digital Payments
- Self-Service and Online Community
- Digital Storage & Data Warehousing.

The missing pillar is data orchestration.



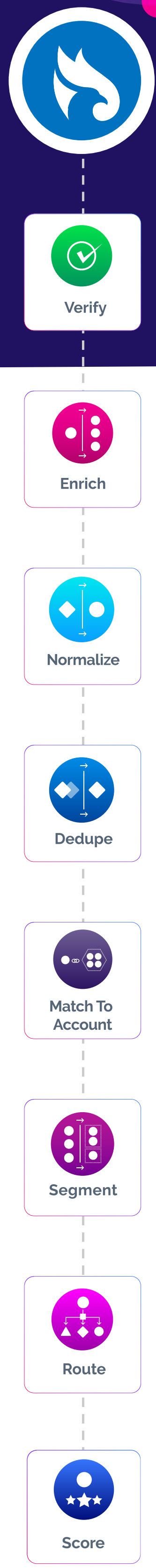
Data Orchestration Is...

Data orchestration in the fourth industrial revolution is a set of interconnected business processes that clean, analyze, and route data through digital systems to the correct place at the right time. The purpose is to increase throughput—to quickly transform raw data into actionable insights that enable people to achieve their goals.
Data orchestration technology "GTM teams" automates all the data-related tasks that traditionally required manual effort, hard-coded workflows, and tools like spreadsheets and ETL software.

> **Data Orchestration technology automatically cleans, analyzes, and automates data across your digital systems, including leads, contacts, opportunities, accounts, and more.**

The core components of a modern data orchestration strategy include:

- **Enrich** critical data points on incoming leads such as job title and company size to ensure go-to-market teams have the information they need.
- **Normalize** data values to a standard taxonomy (i.e. New York = NY) to ensure the format of incoming data complies with your routing and external systems.
- **Dedupe** incoming leads to prevent duplicates from wreaking havoc among your sales and marketing teams.
- **Segment** your data into clear buyer personas, sales territories, scores, and more. (Job Role, Industry, Territory, etc) to enable easy territory planning & assignment.
- **Match Leads to Accounts** to make account-based marketing a possibility by showing lead data in the context of prospect accounts
- **Propensity Scoring** uses any combination of data points to define scoring models for leads and accounts
- **Route** leads and other CRM objects automatically, to the correct place, at the right time.
- **Book** meetings automatically to convert leads into qualified conversations and accelerate the revenue engine.



We will learn more about each of these components later in the guidebook. And we will see there is a distinct similarity between the kind of synergy found in a modern physical factory and that of a digital data orchestration platform.

The four industrial revolutions have been driven by innovative technologies and the benefits they deliver to the world. Now that we have defined what data orchestration is, let's take a look at the benefits it affords organizations.

Describing the Business Benefits of Data Orchestration

Corporate performance expectations compel organizations to find novel ways to maximize profitability. In response, go-to-market teams work together to identify market opportunities, solve business problems, and generate revenues—all while upholding brand reputation. Data orchestration technology is engineered to facilitate these efforts at scale. It's true: necessity is the mother of invention.
Many of the benefits realized through data orchestration are the same kind of benefits that team leaders often seek to advance the business:

Accurate Customer Profiling: Clean, consistent, complete data enables accurate and usable segmentation by vertical, persona, and any mix of other criteria unique to your business.

True 360-Degree View of the Customer: Routing all pertinent data, from new leads to buyer behaviors and other data unique to your business, finally creates that 360-degree view of the customer you've wanted.

Data-Driven Decision-Making (DDD): Every part of the go-to-market revenue engine has all the data they need to make smart business choices.

Marketing Productivity: Marketers have the information they need to create targeted campaigns, sales enablement tools, and tailored messaging that resonates with the target audience.

Account-Based Strategies: Sales and marketing teams have all the information they need to effectively execute targeted sales sequences and nurture campaigns, based on accurate customer profiles.

Sales Effectiveness: Personalized messaging and perfectly timed sales sequences resonate with prospects, encouraging more campaign responses that turn into close-won opportunities.

Better Conversion Rates: Inbound lead gen improves, more qualified meetings occur, and prospects move through the buyer journey faster.

Sales & Marketing Alignment: GTM teams collaborate well together in a trusted CRM that is not a burden, but a system of insight that helps each team achieve mutual goals.

Reliable Forecasting: Weighted pipeline, quota, trend, and sales forecasts are trustworthy because the opportunity and account data that feeds them is accurate.

Brand & Reputation Protection: Inbound lead response is faster, outbound outreach is coordinated, email unsubscribes and complaints decrease, and the customer experience improves across the entire lifecycle.

Industry & Government Compliance: Risk of hefty fines is reduced because all connected systems can be configured to conform to data and privacy regulations.

Capitalization of the Total Addressable Market (TAM): Identify expansion opportunities, verticalize the business into new markets, and deploy multiple GTM programs.

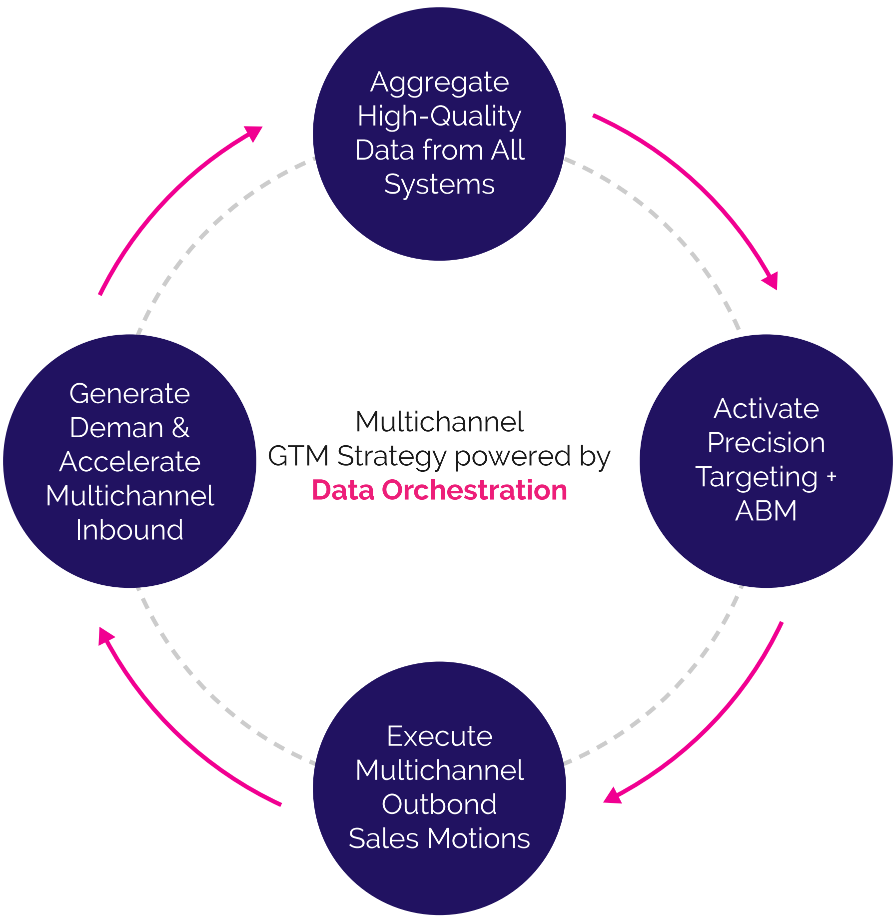
Cost Savings: Eliminate the need to pay for multiple point solutions, reduce MAP storage costs, and create time-saving efficiencies for all GTM teams without having to hire more full-time employees.

Revenue Gains: Increased marketing productivity and improved sales effectiveness manifests as increased deal size and more closed-won business.

ROI Attribution: High-quality data and automated workflows enable more accurate campaign attribution and ROI reporting.

Profitability: Realize all the cost-saving and revenue-generating benefits, year after year.

How to leverage the power of data orchestration to run multichannel GTM strategies



Enhance joint sales and marketing campaigns with precision targeting

Capture high-quality account and contact data from a variety of sources to increase coverage of your TAM. Then identify the specific audience you want to target. Because your data is clean, complete, and consistent, you can easily define exact segments, based on any combination of the following criteria:

- Idea Customer Profile
- Account Tiers
- Buyer Personas
- Sales Territories
- Lead & Account Scores
- High-Value Strategic Accounts

Develop messaging and content tailored for your audience for certain stages of the buyer's journey, and select the distribution channels you want to prioritize.
As part of an ABM approach, you can assign your most seasoned or specialized salespeople to your highest-valued accounts, and put well-crafted sales motions in play. This data-driven, streamlined experience sets up the GTM team for success.

Improve the effectiveness of outbound prospecting

As a result of precision targeting, salespeople can act on the GTM strategy quickly, because they have a clear set of next actions to take. They know who they're targeting and at what point in the buyer's journey.
Account, contact, and lead data are readily available: there's no need to search for emails or phone numbers or sort through duplicate records. Prior engagement and activity history add layers of context.
The sales team uses the messaging that marketing developed, personalizing it before reaching out to their target prospects. Because the message is relevant, prospective buyers are engaged and open to conversation.
Sales sequences are faster and friction-free because the data in the CRM is clean, complete, and consistent.

Generate inbound demand and accelerate lead-to-cash

Targeted outbound prospecting piques curiosity and generates demand. This fuels inbound marketing across multiple channels. Prospects engage with marketing content to learn more, fill out web forms for detailed information, and call the sales line for a demo. More leads are created, and critical data points, such as job title or phone number, are automatically populated. Then:

- Existing leads and contacts are automatically merged, preserving all data.
- Leads from current customers are automatically linked to the right account.
- Net-new leads are instantly round-robined to the next salesperson in the queue.

In all three scenarios, salespeople are notified of potential opportunities, and they have actionable insights in the CRM. Again, it's clear what their next best action is.
Data orchestration technology with intelligent routing and lead-to-account matching drives fast response times, which improves lead qualification.
As you orchestrate and automate sales motions based on precision targeting, buyer intent, and actionable insights, you can expect the following results:

- Faster time to market.
- More sales conversations.
- Improved conversion rates.
- Increased deal size.
- Shortened sales cycle.
- Better win rates.
- Higher return on marketing investment (ROMI).

This kind of strategic approach is made possible by robust technology and high-quality data, enabling employees to move at the speed of their data.

Building a Culture Where Urgency is Valued

A strategic GTM plan is critical to business growth. Be that as it may, management guru Peter Drucker once said, "culture eats strategy for breakfast."
Most companies have a relaxed culture around lead response time and don't take it as seriously as they should. The reason? For some companies, it could be a result of absent leadership. But for most, the real culprit is more likely a combination of poor-quality data and lack of sophisticated technology to automate the data. Employee disengagement is an outcome of bad user experience.

The fix is a three-step process:

- Implement data orchestration technology.
- Capture and automate high-quality data.
- Institute an SLA (service level agreement).

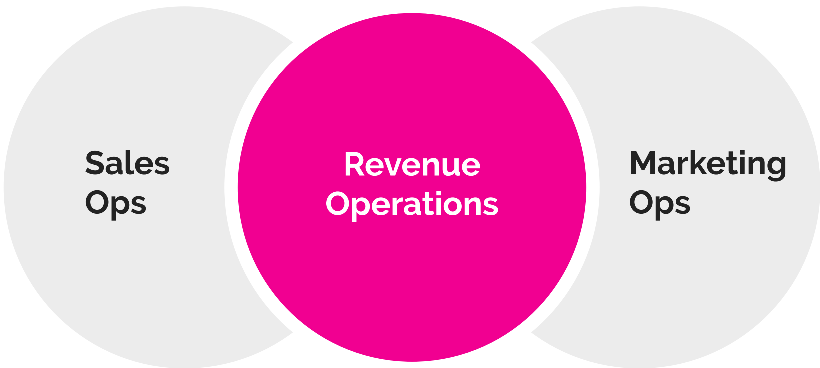
An SLA between sales and marketing fosters accountability and encourages the sales team to respect the leads they're assigned. When lead routing is done properly, there's no excuse for letting opportunities slip through the cracks. Salespeople will immediately notice if their leads are automatically rerouted when the SLA is breached.
Creating a company culture where "speed to lead" is respected can be a competitive advantage. In fact, 78% of customers buy from the company that responds to their inquiry first, as reported by LeadConnect.
In the end, it's a win-win-win: salespeople hit their quotas, marketers meet their goals, and customers get a great buying experience.

Chapter 3.

RevOps Automation & Key Capabilities

The RevOps Role Transcends Sales & Marketing Ops

Traditionally in many organizations, there have been separate operations teams for marketing and sales. Each function has their own set of targets and priorities. Marketing manages the MAP and sales manages the CRM.
However, as the availability of data has increased the past decade and technology like CRM and MAP become more powerful and connected, the need to align the technologies with business operations and customer expectations continues to be increasingly important.
When each department has their own operations team and their own set of priorities, it creates a silo effect and detracts from alignment and the mutual goal of generating revenue.
There becomes a need for better accountability and a need to better align operations horizontally across all go-to-market functions. As a result, we have seen a rise in revenue operations, which combines sales ops, marketing ops, and customer success ops into a merged business function, but works closely across multiple revenue-generating teams with the goal of maximizing that revenue potential.



The centralized RevOps team reports into a single individual who has full visibility of all systems and creates a single point of accountability.
The revenue operations team handles the administration of the systems, processes, and data that the people across the go-to market teams use to serve customers and generate revenue throughout the customer journey and sales funnel.

RevOps leaders are the stewards of high-quality data and the entire revenue technology stack that processes the data. But managing the tech stack is no easy task and, as we've seen, things can go wrong at any point. The proverbial "fire" seems to pop up nonstop, whether it's an issue with lead assignment, opportunity management, or the handoffs between marketing, sales, and success.

Move from Firefighting to Fire Prevention

Companies and their RevOps teams find themselves in a seemingly never-ending battle to fix issues reported by users experiencing friction caused by leads being assigned to the wrong people.

As we've learned so far, there are many issues encountered throughout the organization across different departments. Typically, the different departments look toward the RevOps group and the technology team that manages the tech stack.

It's as if the revenue operations team is constantly putting out fires—some small and some large—that touch multiple business processes and departments. It consumes energy and distracts from other technology initiatives. It stifles professional development, because when you're constantly battling the same issue, you're missing out on other initiatives where you learn new skills that are valuable to the organization.

There's a better way, and it's blatantly simple. Prevent the fires from occurring by designing standard operating procedures and robust, data-driven business processes. A multifaceted approach to controlling your organization's data can help you create better experiences for both employees and customers.

Create Robust, Data-Driven Business Processes

Throughout the customer lifecycle, there are many administrative tasks that need to be completed to serve customers and measure performance. Consider each step along the way as a job-to-be-done, from initial lead ingestion to onboarding and customer advocacy.

Automating as many tasks as possible enables your employees to focus on what matters most: high-value strategic planning, selling, and delighting customers. Every second spent manually performing a task—whether it's updating customer data, scheduling meetings, or creating contacts—is a second taken away from solving customer problems and closing deals.

The ability to automate virtually any marketing or sales workflow is a competitive advantage in being first to market and converting leads to new accounts.

However, each task is a potential bottleneck that can introduce latency and slow down the sales cycle. If just one of the steps fails, such as an out-of-the-box CRM lead assignment rule, it can create a cascading effect that causes more issues that someone has to troubleshoot and fix i.e. fires that the CRM Manager has to constantly put out.

Automation becomes more valuable as the business scales. But to have a net-positive effect, the automations must be resilient to failure and easy to update.

Modern data orchestration technology automates the "jobs to be done" that your CRM, sales tools, and marketing automation solutions don't. Business processes built by data orchestration software are robust and resilient to failure, because they are synchronized and data-driven rather than hard-coded.

This also enables authorized end-users to quickly make updates on the fly—as the company scales and business needs change—rather than having to ask the CRM Manager, internal IT support, or R&D.
Next, we'll review the eight core components of data orchestration that make it possible to create robust, data-driven business processes. Then, we'll dive deeper into many of the features you'll likely need.

> “How you do anything is how you do everything.

8 Core Components of Data Orchestration

Below are the core components you'll need in a data orchestration platform. As we look at each one, take note of the symbiotic relationships between them.

1. Enrichment

Enrichment is the process of updating data on your records, including leads, contacts, and accounts, based on data available from sources like third-party data vendors. Enrichment enables accurate segmentation for marketers, improves accuracy of routing, and gives salespeople the information they need for prospecting and fast response time.

The enrichment process can occur both in real-time or in batch to accommodate your business needs.

Real-time enrichment triggers enable you to automatically append or update data when an event occurs. For example, when someone fills out a form, important data points, such as industry, are immediately added to the record. Intelligent forms allow you to reduce the number of form fields displayed, which promotes increased conversion rates. Real-time enrichment can also be triggered when an activity occurs in the system. For example, the enrichment process can automatically occur when a lead reaches a certain lead score, attains MQL status, or when it's time for the customer to renew their product subscription.

Batch enrichment allows you to update data in your CRM or MAP in bulk or retroactively, without having to export or import any data. The ETL process is automated and changes take place directly at the Salesforce data center. Bulk data enrichment can be scheduled to run at a certain frequency to ensure your data is always fresh and accurate.

After a tradeshow or online event, you can import a list of people that engaged with your company, and important data points, such as missing phone numbers or job titles, will automatically be populated. Deduplication and normalization occur within the same flow. The ease of this process eliminates the manual labor and delay that often prevents salespeople and marketers from reaching out to prospects in a timely fashion.

Enrichment allows the organization to have more insight on prospects and customer accounts, and more data to increase the accuracy of matching leads to the right accounts.

Since no data provider has the perfect database, you may want to use multiple data providers. Multi-vendor enrichment enables you to source thousands of data points from a large number of third-party vendors. For more details, see the bonus chapter at the end of the guidebook.

2. Normalization

Data can enter the system in multiple ways: web forms, list imports, manual input, etc. Normalization is the process of standardizing the data so that it's formatted consistently.

When someone fills out a form, they might input their location in a format that's different from your CRM picklists. For example, California vs CA vs Cali.

Third-party vendors have unique methods of formatting and categorizing information:

- CPG | Consumer Packaged Goods | Consumer Packaged Goods (CPG)
- SVP | Senior Vice President | Sr VP

Other common use cases:

- Normalizing phone numbers to ensure auto-dialers work.
- Normalizing company names to be fully spelled out. (GE > General Electric)
- Fix case issues in names and company names.
- If someone inputs their name in all caps, like "ANTHONY PICA", an automated email will start with "Hello ANTHONY," which looks unprofessional.

Just like enrichment, normalization can occur in real-time or in batch, empowering you to keep your data unified to a standard format across all fields in all systems.

Normalization creates a cleaner, structured database. It enables deduplication, segmentation, and lead-to-account matching, and allows for all systems to run tasks that require consistent data.

3. Deduplication

It's important for the health of your database to keep it free of duplicates. Your data orchestration solution should automatically merge or convert leads, contacts, and accounts according to business rules you define. Both real-time and batch deduplication maintains the integrity of your marketing segments and enables faster, reliable routing.

Real-time duplicate prevention creates a perimeter that protects all of your systems from bad data. Prevent your web forms, web-to-lead, list imports, and manual entry from being a source of duplicate leads.

You can set up rules to fix dupes any time a record is created or modified in your CRM and connected systems. As-you-type duplicate prevention stops dupes and unstandardized data from being entered via manual entry by alerting users before the record is created. *Out-of-the-box Salesforce duplicate functionality only alerts users after the record is created.*

Batch deduplication enables operations teams to fix any duplicates that may already be in the system.

Besides single table deduplication, you might need a solution to deduplicate records across different objects, including both standard and custom objects. Fuzzy matching logic and flexible merging rules give you complete control of how duplicates are merged, using any combination of fields.

- Find and merge duplicates like Rob and Robert.
- Concatenate text fields.
- Add or average number fields like lead score, or preserve the highest value.
- Prioritize the importance of picklist values.
- Archive overwritten field values.

Go beyond basic CRM duplicate functionality to maintain clean, complete, and consistent data, and set up your GTM teams for success.

4. Segmentation

Segmentation enables precision targeting. Here are some examples of what you might want to create segments for:

- Ideal Customer Profile
- Buyer Persona
- Customer Journey Stage
- Buyer Intent & Engagement
- Account & Lead Score
- Sales Territories

With precise segments, you can create targeted campaigns to nurture best-fit accounts, identify whitespace opportunities, and align parallel priorities with sales.

You can setup segments using any combination of data points according to your business needs, or leverage templates, such as:

- Job Function/Department
- Job Seniority/Job Role
- Industry
  - Map NAICS codes, SIC codes, and industry keywords.
- Company Size
  - Map revenue and employee ranges to company size segments.
- Geography
  - Map address, zip code, and state values to territories.

Real-time segmentation automatically adapts to changes in your database, so your sales and marketing targets are always up to date. For example, as new leads or accounts are created or enriched, they are dynamically put into the proper segments.

You may also want to create specific groupings for list uploads and web submissions, or batch segment your data for granular partitioning of your sales and marketing systems.

Segmentation empowers you to maximize the results of multichannel GTM strategies.

5. Lead to Account Matching

Matching leads with accounts is a prerequisite for account-based sales and marketing strategies. It is necessary for having a complete, centralized picture of a company and its buyer signals. From one place, you can see all activity and engagement, such as new interest in a product.

Let's say 10 known contacts exist at an account. And 5 new inbound leads are created after they respond to a marketing campaign. Because these leads are matched with the account, the salesperson is aware of the new activity and can reach out to explore cross-sell opportunities. Right from the account record in the CRM, the salesperson has at-a-glance visibility of all buyer signals from all 15 people (not just the 10 previously known contacts).

Without lead-to-account matching, leads are siloed from their related accounts, which causes all kinds of issues, including:

- An SDR is assigned a new inbound lead record, calls the prospect as part of their sales process, and is informed that the "lead" has been a customer for five years.
- The account owner is unaware that someone new from their customer account requested a demo for a new product, and they miss out on a cross-sell opportunity.

Lead-to-account matching improves enrichment, segmentation, and campaign targeting. Newly acquired data from a lead can be automatically populated to an account, and existing account data can be automatically added to the lead.

Flexible configuration enables you to define processes according to your business needs. Leads that are matched with accounts can be configured to automatically convert into contacts, or you can leave them as lead records to preserve your marketing metrics, sales processes, and conversion metrics.

Sales, marketing, and customer success get actionable account insights for effective execution of multichannel GTM strategies.

6. Propensity Scoring

Propensity models are used to predict outcomes, such as the likelihood of a lead being qualified into an opportunity, whether a prospect will buy a product, what the deal size might be, or whether leads will respond to a nurture campaign.

Ideal customer profile, buyer personas, intent signals, and customer journeys can be used in propensity modeling to create numerical lead and account scores.

Lead and account scores inform the sales and marketing teams which prospects they should focus on next. A high score indicates buyer readiness and/or identifies high-value strategic accounts.

You can base scores on any combination of attributes. For example:

- Lead **behavioral scores** can be calculated by web page visits, email clicks, downloads, video watches, form fill-outs, etc.
- Lead **demographic lead scores** can be built from job function, job title, good phone number, work email domain, etc.
- **Account scores** can be based on firmographics, such as geography, employee count, annual revenue, industry.

Propensity modeling and scoring are tools to optimize your go-to-market strategies. Marketing targets are more precise, sales motions are prioritized, and the entire revenue team is aligned on next best actions.

Lead and account scores can also be included as factors in segmentation and routing.

And high-quality data improves the accuracy of lead and account scoring, so enrichment, normalization, and lead-to-account matching are important pieces of the puzzle. They all work together to drive business results.

7. Routing

Routing data to the correct place, at the right time, is a mission-critical business process. Keep in mind, 78% of customers buy from the company that responds to their inquiry first. Lead response time is not a gamble most businesses can afford to make.

Lead routing is a data-driven process that depends on high-quality data. Fortunately, all of the data orchestration components are designed to work together symbiotically, so lead assignment is fast and accurate.

Normalization, enrichment, deduplication, lead-to-account matching, and segmentation work in sync to automate the complex rules and decisions for assigning records to the correct people or queues.

Data-driven routing rules support virtually any use case. Examples:

- Evenly distribute leads with flexible round-robin.
- Control lead assignment using sales territories, which can be based on more than
- Just geography, such as company size, technologies used, and product interest. Assign industry-specific leads to specialized teams.
- Trigger tasks to alert salespeople of next best actions.
- Automatically create renewal opportunities.
- Transfer account ownership one year after initial purchase.
- Convert leads into account contacts, according to your business rules.
- Escalate a support case to tier 2, or change ownership to a different department.
- Update any field on any CRM object. For example, mark a prospect as "Marketing Qualified" when they request a demo.

Automated, data-driven routing processes minimize friction. Fewer leads are lost, and the company culture flourishes around the idea that lead response time is tantamount to success.

GTM revenue teams can make "speed to lead" their competitive advantage by implementing an **Intelligent Routing Strategy**.

8. Automated Meeting Bookings

Live conversations and demos are important to the buyer experience.

- Prospects can ask clarifying questions specific to their unique business needs.
- Salespeople can diagnose business problems and offer solutions.
- Trust and rapport begin to set in.

The problem is that people are busy. Scheduling a meeting is yet another manual task. All the back and forth—trying to find a time that works for everyone—creates friction in the customer experience. It's not uncommon to have less than half of inbound meeting requests actually happen.

The solution: enable people to instantly book meetings after submitting a form on your website. Based on your sales territories and round-robin assignment rules, the correct sales rep's availability is shown to the prospect. An automated scheduling process removes friction for everyone.

Conversion rates increase as lead response times decrease. Remember, there's a 21X increase in the likelihood of a lead being qualified when a salesperson responds within five minutes compared to 30 minutes. Instant booking takes lead response time down to zero minutes.

Automated emails minimize no-shows by reminding buyers of their upcoming meetings.

"Commitment and consistency" is one of Robert Cialdini's six principles of persuasion that states people like to be consistent with their values and actions. By enabling instant booking, you're invoking this principle. It starts with a tiny commitment to learn more about your solution, and the buyer's actions remain consistent as they fill out a form, schedule a meeting, and proceed through the sales cycle.

Automate the scheduling process to convert inbound leads into qualified meetings and increase your opportunity pipeline.

Notice the similarity between data orchestration and factory automation? The same synergistic effect found in modern physical factories can also be seen in digital data orchestration. The entire flow is streamlined.

Now let's dive into the specific capabilities you'll either need immediately or at some point in the future as your company grows.

27 Features That Make it All Possible

An all-in-one data orchestration platform automates all the revenue processes you need.

1. Perimeter Protection

Dedupe and clean data before it enters your CRM or MAP. Guard your systems from problems caused by bad data.

2. Automated Updates

When processing leads or other objects, you might want to have a field value updated—any field, whether it's the record being processed or the matching record. For example, if you have an open opportunity, and the CTO from the same company watches a recorded demo of your product, you can have them added as a contact role to the opportunity as an influencer or decision-maker automatically.

3. Easy & Secure Mass Update

A flexible multi-table data manipulator enables you to modify thousands of records without complex manual work. Fix invalid accounts owners, change contact owners, merge custom objects, adjust lead scores, concatenate field values, mass delete records, etc. Security is improved when there's no need to download and use the data loader to make updates.

4. Tasks & Alerts

If a prospect requests a product demo or consultation, you can have a task assigned to either a salesperson or a product specialist to conduct the demo. This is one way to hold people accountable to following through on action items. Email notifications can optionally be delivered so action items are added to the inbox.

5. Multi-Vendor Data Enrichment

Populate virtually any data point, in real time, from any number of the industry-leading data vendors. Within the same flow, an intelligent routing solution can standardize the enriched data into usable segments according to unique business requirements.

6. Flexible Fuzzy Matching

Use fuzzy matching on any combination of fields to identify duplicates according to your unique business requirements. Match duplicates like Bob and Robert. Go above and beyond the matching capabilities of your native CRM or MAP.

7. Assign Campaign Membership

Enable campaign ROI attribution and facilitate sales and marketing alignment by automatically adding leads and contacts to campaign, or update member statuses and leads progress through the sales funnel.

8. Effortless List Import

With drag-and-drop ease, import data with confidence from lists, such as a csv of leads from a tradeshow, while ensuring no duplicates or unstandardized data enters the system. Pre-built import templates makes it seamless to insert and update data to leads, contacts, accounts, and custom objects. Clean and easy.

9. Standardization

Data enters the system in different shapes and sizes. Your routing system should be able to A) **normalize** the data into standard formats (i.e. CA is always transformed into California) and B) **segment** the data into buckets so marketing teams have crystal-clear persona targets for their campaigns, and sales teams can quickly build call lists in Salesforce or maintain simplified territories.

10. Activity Reports & Audits

Comprehensive activity reports make it possible to view lead history and activity, such as the number of leads linked to an account for any time frame. Audits are helpful to answer questions like, "Why was the lead routed this way?" You'll find it useful to have logs with visibility into matching results, record assignments, and any fields that were updated—all in one easy-to-view report.

11. Efficient CRM & MAP Integrations

Streamline the flow of information between your CRM and your marketing systems, including Marketo, Pardot, Eloqua, and Salesforce. Connect your whole MarTech stack and streamline the flow of information.

12. Automatic Opportunity Updates

Easily implement rules that trigger opportunity updates. Develop criteria that auto-creates opportunities, updates specific opportunity fields, and notifies owners of new opportunities assigned to them.

13. Visual Interface: Rule-Based & Flow Chart UI

A good user experience removes friction from managing workflows, allocating user licenses, and making quick updates. Usability correlates with adoption. A visual display with drag-and-drop functionality, or using flow charts, makes it a delight to maintain your data orchestration rule without complicated decision trees.

14. Intelligent Web Forms

As prospects fill out forms on your website, the data needed to segment, route, and score your leads is automatically appended in real-time in accordance with your multi vendor enrichment waterfall.
Quickly publish web forms that reduce friction and increase conversion rates. Clean and append data in real-time. Automate inbound lead conversion by integrating the booking process into webforms.

15. Propensity Scoring

Use any combination of data points to define scoring models for your target accounts.

16. Territory Planning & Management

Easily design and maintain sales territories, and implement territory-based routing workflows.Territory management can be based on your analysis of ideal customer profile, account scores, buyer persona segments, including:
Geography, Vertical, Size of Company, Competitors, Capital Raised, Crunchbase Rank

17. Meeting Lifecycle Management

Convert inbound leads into qualified meetings by enabling prospects to book time for live conversations, such as product demos. Available meeting times are sourced from data-driven rules like sales territories, round-robin assignment, and sales rep's individual calendars. Simple rescheduling and automatic email reminders minimize no-shows.

Create a better customer experience with self-serve meeting booking, and streamline the outreach process for salespeople and customer success managers.

18. Smarter Routing & Fully Automated Lead Assignment

Distributing leads quickly and correctly is a vital part of sales and marketing lead management. There are many features you can use to route any object, including leads, contacts, opportunities, accounts:

1. Round-Robin

Create pools of users to assign leads on a rotating basis. This ensures salespeople all get a fair amount of "at bats" and the workload is evenly distributed. Round-robin functionality is a core component of an intelligent routing strategy.

2. Custom Weighting

Further customize your round-robin lead assignment by giving each user a weighting so they're assigned fewer or more leads from a queue, without having to manually intervene and disrupt the round-robin flow.

3. Capping

You might need to limit the number of leads able to be assigned to people. For example, to prevent a salesperson from having too many open leads, stop assigning them new prospects if they're already working at full capacity.

4. Time-Based

Employee schedules can change. As people take paid time off, you need to make sure they don't get assigned leads, because if they do, your lead response time will be way beyond 5 mins—perhaps even beyond 5 days.
You might also want to accommodate different employee working hours, especially for sales reps working in different time zones.

5. Cross-Object

Matching leads and contacts with other objects, such as accounts, opportunities, and cases can be useful as part of an intelligent routing strategy. For example, matching leads with accounts is necessary to optimize account-based marketing and sales processes. If a lead enters the system with an email domain that matches an account's website domain, you can have the account data copied to the lead record for increased visibility.

6. Account-Based

Matching leads to accounts is one of the most common components of an intelligent routing strategy and enables account-based marketing. Route based on any standard or custom field.

7. Re-Routing

Are there scenarios where you would want to reroute leads, such as a missed SLA? You might want to automatically reroute a lead if an SDR does not take action, such as changing the lead status within a certain time period of a lead being created. Yes, you can foster a culture where everyone respects lead response time by instituting a policy where the consequence is a hot lead being taken away.

8. Backup Owner Assignment

Organizations may have unique needs that require flexibility in who or what gets assigned the record. Here are some examples of ways you might want to assign leads or contacts: a round robin group, a specific Salesforce user, an account team member, a column from a CSV file, a hidden field on a web form, or even use a Salesforce assignment rule.
As an extra layer of protection, a backup owner can ensure no lead goes unanswered.

9. Automated Meeting Booking

Available meeting times are sourced from data-driven rules like sales territories, round-robin assignment, and sales rep's individual calendars.

An advanced rule engine enables you to effortlessly combine the power of round-robin, custom weighting, and capping. You can set up routing rules based on territory, industry, company size, or any other custom criteria. For example, when you hire a new salesperson, you might want to give them fewer leads until their 90th day after they complete their training. Or you might have a seasoned rep who you want to ensure gets more leads.

Chapter 4.

Considerations for Buyers & Decision Makers

We looked at the financial impact of data debt, the systemic friction caused by ineffective data automation, and the multitude of business benefits realized through data orchestration.

Now let's review things to consider when deciding what kind of technology to implement. Ultimately, we recommend investing in an all-in-one data orchestration platform to protect your business assets now and in the future. But buyers in the market for a solution to automate and optimize their sales and marketing data have more than one option to pick from, so let's talk about the alternative approaches.

First, we'll start off with discussing whether using the software you already have (e.g. Salesforce or Marketo) is adequate.

Native CRM & MAP

The one pro of using what you already have is that you don't have to open your checkbook. (But at what cost?)
Out-of-the-box, Salesforce provides lead assignment and duplicate management functionality. If an organization is just getting started using Salesforce, these solutions may suffice. But as the company grows and scales, it quickly becomes clear the capabilities of the CRM are limited when it comes to orchestrating data.

Lead assignment rules are increasingly difficult to manage as business logic changes and updates are needed to accommodate new scenarios. Round-robin assignment isn't even possible without configuring complex workarounds involving new fields and formulas.
Duplicate management is just as insufficient: matching logic is basic, and auto-merging isn't possible.
Advanced admins with requisite security permissions can explore workflow rules and process builders to augment assignment rules. Some organizations can get away with it if they have the time and resources available, but again, as business rules change over time, adjustments need to be made, and the modifications pile up. The automations become intertwined, confusing, and unrealistic to manage.
Out-of-the-box functionality can end up being slow, inaccurate, and difficult to scale. You may experience timeout errors and record-locks particularly if Salesforce is integrated with other systems like MAP. Every second counts when it comes to lead routing.

Custom Code

Declarative automations mentioned above are limited, but programmatic customizations are much more powerful.

If you have access to skilled developers, you can have them create custom code to increase the flexibility of your business processes such as round-robin lead assignment. The upside is that there are many more possibilities. The downside is that custom code is expensive. Code takes time to write, test, deploy, and modify. If a problem arises, you may wait for days or weeks for the code to be fixed. And if you do have in-house software engineers, every minute they spend writing code to orchestrate your data, it's a minute they're not spending on product development or other important initiatives. What's the opportunity cost?

Meanwhile, turnkey solutions can be installed in hours or days, and can be controlled directly by the CRM manager or ops team with drag-and-drop functionality.
When native functionality or custom code is the chosen path, technical debt accumulates behind the scenes while operation leaders, CRM managers, and developers battle fire after fire.

On the other hand, turnkey software solutions are purpose-built, robust, and battle-tested in diverse environments. SaaS vendors are at the forefront of solving complex data automation challenges. They have defined what the data management best practices are. By investing in a third-party solution, you not only get the innovative technology, but you also reap the benefits of their unique skills and deep experience.

Point Solutions

There are multiple solutions available on the market to help with data orchestration. They are each built to fix a specific issue. They're easy to maintain and are often more dependable than homegrown solutions like custom code. Implementing a point solution can be a quick fix to an acute problem. But taking shortcuts can cost you in the long-run. As a company tries to automate each of the data management jobs-to-be-done, the number of point solutions installed into the techstack increases. Full coverage of all data orchestration processes can require anywhere from 4-7 different solutions from different vendors that execute asynchronously. That's a half-dozen disparate technologies someone would need to integrate and maintain.

The software costs add up, the number of potential failure points increases, and maintenance overhead accumulates. Plus, the risk of legal compliance in managing customer data is magnified when multiple point solutions are used because your data touches more third-party systems.

When all is said and done, managing multiple technologies across multiple systems can feel like an IT project that never ends, consuming more and more resources over time. The golden question executives think about when investing in new technology is, "how can we maximize performance while minimizing total cost of ownership?"

The Synergy Advantage of an All-In-One Solution

Physical factories have been designed to eliminate bottlenecks and lag time between different stages. These same ideas that originated from the previous industrial revolutions also apply to digital data orchestration in the fourth industrial revolution.

Incoming data, such as leads, are synonymous to the materials at the start of the manufacturing assembly line. Data orchestration components (e.g. enrichment, segmentation, and routing) are comparable to the different stages of an assembly line. Synergy emerges when all the different stages are tightly connected, can self-correct, and can build upon each other's positive effects. For example, automatically enriching data points makes it more effective to find and merge duplicates in the system. Enrichment and normalization make it possible to create accurate segments. Routing is more effective with accurate segmentation.
It's true: the chain is only as strong as its weakest link.
In an all-in-one solution, all data orchestration tasks run in harmony in a single flow. Throughput increases because there are no bottlenecks.
In contrast, putting together multiple technologies from multiple vendors is likely to be far more costly than purchasing a complete data orchestration platform. An all-in-one solution not only solves current business problems, but can also support future use cases as the company scales.
Ultimately, it's more cost effective to purchase an all-in-one platform that supports the entire revenue processes, because the total cost of ownership is lower.

Benefits of Consolidating Your RevOps Technologies

- Reduce software costs.
- Minimize overhead.
- Erase technical debt.
- Eliminate bottlenecks and latency.
- Reduce manual effort.
- Save on MAP storage costs and API callouts.
- Increase CRM adoption.
- Meet data compliance regulations.

Benefits of Partnering With One Provider

- One support team to work with.
- One help center to navigate.
- One set of internal docs to manage.
- One user interface to learn.
- One investment and procurement process.
- One security review procedure.
- One contract and legal review.
- One powerful system of insight.

Other Questions to Ask Before Making a Purchasing Decision

- Are customer success stories or references available?
- What do the product reviews look like on sites like G2 Crowd and AppExchange?
- Is there an onboarding process to get up and running fast?
- What's the scope of support?
- Are there self-service resources where you can get answers fast?
- How thorough is the product documentation?
- What response time can be expected if an issue arises?

The decision on what kind of data orchestration platform to purchase will determine the future success of the entire go-to-market revenue engine.

As we have seen, you can leverage the power of a sophisticated data orchestration platform to minimize GTM friction and accelerate revenue generation—and maximize profits for the business.

We hope this guidebook has served you well in your decision-making process.

EXECUTIVE SUMMARY

Top Five Takeaways

To help you keep in mind the most salient points of this guide, here is a list of five key takeaways:

1. $500K+ is lost by companies with just 5,000 incorrect records.
2. Increase revenue by orchestrating multichannel GTM strategies with high-quality data.
3. Save time and money by consolidating revenue operations technology.
4. Minimize total cost of ownership with an all-in-one platform.
5. An all-in-one platform invokes the compounding effects of synergy.

Bonus:

Multi-Vendor Enrichment & Data Sources

The typical company requires 4-7 data providers. This is because no single data provider has the perfect data for every persona or industry, and every vendor has their own unique taxonomy—which is why most data providers have match rates far below 100%. For example, you can choose one data provider that excels at providing firmographic data and another vendor that specializes in buyer intent signals.
Access best of breed third-party data sources and get over 3,000 attributes to empower your GTM revenue engine.

Deploy Waterfall Enrichment

Source data from multiple vendors and use the waterfall enrichment strategy to increase cover of your TAM.
You can save money on your data vendors because you're not burning through as many credits from certain providers.
Define a cascading hierarchy of which data vendors are called, for which fields, and in what order.
Assign data sources as primary, secondary, and tertiary to ensure the highest match rates.
Use your own data or find what you need on the Data Exchange.

The DataExchange

The DataExchange is your guide for exploring the vast third-party data marketplace, providing you with all the information you need to make better data decisions.

- Curate the perfect enrichment recipe.
- Operationalize new data sources immediately.
- See reviews from your peers in the community.
- Blend all your data sources in a single command center.

The DataExchange is the most comprehensive data catalog on the web.

Visit DataExchange

About RingLead

The RingLead Platform combines all RevOps automations and data quality management processes into a single command center.

Verify · Enrich · Normalize · Dedupe · Match To Account · Segment · Route · Score

The RingLead Data Orchestration Platform

What They're Saying

"It's my favorite piece of software we purchased … we merged and converted 200K+ duplicates using RingLead, and our database is only 500k records.

- Kim Wieczner
Sr. Manager, Marketing Ops
Bullhorn

WATCH VIDEO

"RingLead allowed us to consolidate multiple functionalities into a single platform. No code needed

- Juliet Forte
VP, Marketing Ops
Kaseya

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"We're able to talk more accurately about multi-touch revenue attribution and ROI.

- Dory Viscogliosi
Senior Global Marketing Ops Mgr, Datto

WATCH VIDEO

"RingLead immediately had an impact on our pipeline and revenue growth. Sales is no longer wasting time on duplicate leads or calling leads at customer accounts.

-Iryna Zhuravel
Head of Growth
Altium

WATCH VIDEO

"Without RingLead Lead to Account Matching, our routing doesn't work

- Calon Alpar
Sr. Mgr, Demand Gen
Watermark

WATCH VIDEO

"Before RingLead, we used multiple different providers to manage data quality, segmentation, and lead routing. We were able to consolidate all of that into RingLead which is much

- Ashley Langford
Certified Marketo Champion &
Sr. Mgr, Marketing Ops
Integrate

WATCH VIDEO

About Author

Anthony Pica

Anthony Pica is a marketing leader, Salesforce trailblazer, and writer.

As the head of marketing at Salesforce consulting partner Internet Creations, Anthony designs marketing strategies to grow the business with his team. He helped the company land on the Inc. 5000 list of fastest-growing private companies in America.

His marketing journey began in 1998, a time when he would play JezzBall while taking a break from designing and hand-coding websites for online gaming organizations. In 2005, he founded his first business, a full-service marketing agency.

Ever since he was a kid, Anthony has had a technical mind by nature because of his insatiable curiosity of how things work. He's passionate about digital technology. Today, he holds nine Salesforce certifications and believes in the power of the CRM platform and its AppExchange ecosystem to create better experiences for people. He is the founder of the New Jersey Salesforce Trailblazer Community Group.

As his mentor Marcus Aurelius said nearly 2000 years ago, the happiness of your life depends upon the quality of your thoughts. Anthony believes writing is the best way to clarify our thinking and improve the quality of our thoughts. This is why he loves to write—whether it's sharing ideas in his "work smart, lead better" newsletter or helping organizations grow and educate their customers with thought leadership content.

In his free time, Anthony enjoys reading, photography, playing music, and learning new things. He lives in New Jersey right outside of Princeton with his wife, son, and two dogs. Sometimes you can catch Anthony at the water cooler cheering on SpaceX and Tesla as they usher in a new era for humanity.

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Continue the Journey

- Request a Live Demo.
- Join the Data Orchestration Community (DOC) on Slack.
- Subscribe to the blog for more data orchestration ideas.
- How to build a Data Orchestration business case.
- Get a custom dirty data report card.