Cleaning - enriching - maintaining

This is how DPD mastered master data

dun & bradstreet

The challenge

Do you like to tackle a CRM project? Or do you respect it like many of your colleagues? Then you should definitely read this article. It shows that everything runs smoothly if you take it right into your hand. DPD was about to introduce a new CRM system.

Together with a small team, Jasmine Zurbuchen used the opportunity to clean up the database and thus create an optimal basis for further work. This article describes DPD's path to perfect customer data.

"It all started in summer 2017," recalls Jasmine Zurbuchen, Product Coordinator at DPD. "Our old CRM system was gradually reaching its capacity limits." The quality of the data was also no longer as good as the people responsible at DPD would have liked it to be. "We were running the customer data in our CRM," Zurbuchen explains, "but a lot of the data was simply no longer correct, there was a lot of information missing, and we were running a lot of duplicates."

Mandatory fields were also not defined. As a result, employees saved new entries without filling out all the fields. Gaps in the database were unavoidable. The decision to introduce a new CRM system had already been made at this time. The old one no longer met the requirements and had to make room for Salesforce.

Jasmine Zurbuchen knew that the existing data was not good enough for the new CRM and now was the perfect time to thoroughly clean up the database. For this she needed a data specialist as a partner.

For a good start with the new CRM it is essential to clean up and enrich the data first. It's the only way to have a clean basis.

Jasmine Zurbuchen,
Product Coordinator at DPD

The solution

Cleaning and enriching data

She found it with Dun & Bradstreet. Dun & Bradstreet's database contains information about around 700,000 companies in Switzerland. In addition, Dun & Bradstreet has access to Dun & Bradstreet's worldwide data universe and thus to up-to-date information on 300 million companies worldwide. DPD thus handed over its customer database to Dun & Bradstreet, where the data preparation took place in the first step. Dun & Bradstreet checked whether the existing information such as address, email addresses or telephone numbers was correct and complete and added the current and missing values where necessary. This step involves matching with the D&B D-U-N-S® number, the worldwide unique identification number for companies. This made it possible to eliminate duplicates from the database. Jasmine Zurbuchen sums it up as follows: "All this worked smoothly."

Enriching data

But that was not all, because the second step involved enriching the database with additional information. Among other things, each company was given a risk indicator. It indicates how the financial risks of the relevant companies looks like.
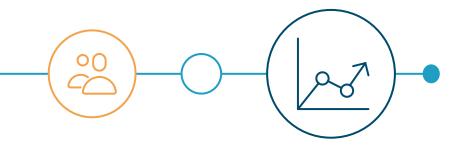
"We have enriched a lot from identification to risk," recalls Zurbuchen, "we wanted not only to do the most necessary job, but to do it right. We have consciously and gladly invested in it."

The data was now in the desired form. All gaps filled, all correct data inserted, duplicates eliminated, risk assessment available. With this database, DPD took the next step, importing the data into Salesforce.

> We knew the importance of high quality data, so we told ourselves if we started something new, we'd do it right.

Jasmine Zurbuchen,
Product Coordinator at DPD

Maintaining:
For long-lasting high data quality

Cleaning up data and migrating it to a new system is one thing. Keeping it over a long period of time completely and correctly is another. "The whole thing must be taken care of," Jasmine Zurbuchen sums up aptly. DPD has defined all mandatory fields to make it impossible to save an incomplete entry.

On the other hand, the express and parcel service provider has combined the Swiss Insight Web Service SIW with Salesforce. "If someone enters a new company in CRM, then we pull the current master data via SIW. This is how we maintain our high data quality," says Zurbuchen.

Back to the risk indicator: Via the SIW interface, a current risk assessment of the relevant risk comes directly into Salesforce. The sales department thus sees how the financials of potential business partners stand and whether it is necessary to obtain even more information before closing a deal.

The new CRM is now in operation at DPD, the data is clean and always up-to-date. With this basis, DPD is in a position to respond much better and faster to customers and their wishes. Salesforce cloud solutions helps them to achieve their goals. Or as Jasmine Zurbuchen puts it:

Big data is the key factor in the global digital revolution.

Jasmine Zurbuchen,
Product Coordinator at DPD

THE WORLD OF DPD

- DPD is one of the leading providers of express and parcel services in Europe.

- DPD Switzerland is the number one private express and parcel service provider in Switzerland.

- DPD is represented in over 40 countries with a total of over 800 depots of its own.

- DPD Switzerland has more than 900 employees at 12 locations

ABOUT DUN & BRADSTREET

Dun & Bradstreet, a leading global provider of data and analytics, enables companies around the world to improve decision-making and business performance. Dun & Bradstreet's Data Cloud fuels solutions and delivers insights that empower customers to accelerate revenue, lower cost, mitigate risk, and transform their businesses. Since 1841, companies of every size have relied on Dun & Bradstreet to help them manage risk and reveal opportunity.

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