

This global insurance industry player undertook a data management project to address data that had been inputted without governance.

BEFORE:



37%

OF RECORDS
MATCHED TO
DUN & BRADSTREET
D-U-N-S NUMBER

AFTER:



92%

OF SALESFORCE
DATA MATCHED TO
D-U-N-S NUMBER



67%

OF DATA MATCHED
WITH HIGH
CONFIDENCE

PRODUCTS USED:

D&B Optimizer
for SALESFORCE

D&B Hoovers

There's Value to Be Found in That Unused Data

Master data approach helps enhance the value of data in Salesforce.

HARNESSING TWENTY YEARS' WORTH OF DATA

In 2019 this company undertook a data management initiative to address a large pool of distributed, unconnected data, the result of multiple acquisitions and data migrations over a twenty-year span. According to their CRM Business Analyst, "During our company's early data migrations, we didn't have a formal process to cleanse and validate information. Incoming leads, such as trade show leads, were inputted subjectively and without governance, resulting in a pool of incomplete, inconsistent, and inaccurate data."

Could they turn twenty years of data from a liability into an opportunity?

As part of this project, the company identified the need for a data management platform that could validate, manage, enrich, and seamlessly integrate clean data into its Salesforce instance, considered the "golden record repository" for the organization. The company considers the data in its Salesforce instance as the organization's single source of truth. It is the foundation of their master data strategy.

The goal was to append missing information, fix errors, reduce duplicates and increase matches to identify single instances of a company, person and other data types, eliminating duplicate records and providing context of an entity. "We knew that a unique identifier, like the D-U-N-S® Number, would be critical as it would provide an anchor for understanding if records were related to one another," noted the CRM Business Analyst.

MATCHING ENABLES DEEPER INSIGHT INTO DATA

Using D&B Optimizer for Salesforce within a sandbox environment, the team tested high-confidence matches between their data and the Dun & Bradstreet Data Cloud. The D&B Optimizer matching process takes a company's existing information and compares it to 330+ million records in the Dun & Bradstreet Data Cloud using Dun & Bradstreet's propriety matching process.

BETTER MATCHES WITH D&B OPTIMIZER

After seeing improvements in match rates within the testing environment and gaining context to the match reasoning, the team moved D&B Optimizer for Salesforce into production. Initially, less than 40% of the company's records matched to a D-U-N-S Number, but they were able to increase data matches to 92%, with two-thirds being high-confidence matches.

“D&B Optimizer for Salesforce saved us a lot of time and effort. **We didn't have to conduct our own manual research on more than 12,000 records.** The Dun & Bradstreet solution quickly showed us which records required our attention and which were duplicates. That's incredible efficiency!”
— CRM Business Analyst

Using D&B Optimizer's Data Stewardship dashboard, the team gained a holistic view of the current state of its customer data.

“Using the dashboard, we could instantly identify duplicate records and merge the duplicate files with the click of a button. The merge completed in about three hours – a big improvement compared to the multiple days and hours the process would have taken us in the past.”

MORE EFFICIENT DATA INTEGRATION

Today, as new data is brought into Salesforce, the team can identify if information is new or a duplicate and handle each case appropriately. This keeps their Salesforce instance uncluttered and more accurate.

“We rated the onboarding process for D&B Optimizer for Salesforce **an 11 out of 10.** Whenever I needed assistance, my Dun & Bradstreet onboarding representative was there.”
— CRM Business Analyst

EXPANDING MASTER DATA STRATEGY

Based on their experience with this project, the company plans to expand from its department-level data management solution and expand their master data journey toward a company-wide strategy to instill consistent data governance policies across departments including its human resources and finance platforms. This strategy can extend the benefits the company has gained in its sales & marketing department to the rest of its organization, enabling more efficient digital workflows and more confident decision making across the enterprise.

We like to share our customers' successes and inspire other teams that may face similar challenges. Due to the sensitive nature of some customers' businesses and their data strategy, we respect their privacy and do not identify them by name.

ABOUT DUN & BRADSTREET

Dun & Bradstreet, the global leader in commercial data and analytics, enables companies around the world to improve their 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. For more about Dun & Bradstreet, visit [DNB.com](https://dnb.com).
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