

How Xerox elevated global data integrity with Plauti Data Management

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- Hans van den Bosch, Global CRM Program Manager at Xerox



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Xerox, a globally recognized printing and document management leader, has been at the forefront of innovation since 1906. Today, the company offers diverse workplace solutions, from multifunction printers to advanced document management software and managed print services. At its core, Xerox is committed to enhancing the flow of information and optimizing work processes for businesses worldwide.

As a Global CRM Program Manager at Xerox, **Hans van den Bosch** oversees the company's CRM strategy, ensuring that Salesforce is effectively implemented across regions. His role involves managing projects, ensuring data accuracy, and fostering collaboration across teams to enhance customer understanding and interaction. The importance of clean, reliable data is paramount in Hans's role, particularly when it comes to marketing and client experience initiatives.

The challenge: tackling data duplicates

Xerox's complex global operations brought unique challenges, particularly concerning data duplication. While individual sales teams might not immediately notice duplicates within their localized interactions, the problem escalated when cross-team processes were involved. This was particularly evident in global client experience initiatives, marketing activities, and system integrations, where duplicate data could significantly impair the effectiveness of these processes.

"For individual sales teams, duplication isn't immediately noticeable because they interact with their own set of customers. However, duplication becomes problematic when we have cross-team processes, like global client experience, marketing activities, and system integrations."



Hans van den Bosch
Global CRM Program Manager at Xerox

High duplication rates and outdated information within Salesforce were not just minor inconveniences—they directly impacted the success of marketing campaigns and the accuracy of client satisfaction assessments. “High duplication rates and outdated information in Salesforce directly impact the effectiveness of our marketing campaigns,” Hans emphasized, highlighting the urgency of addressing these data quality issues.

The solution: choosing Plauti Data Management

Xerox searched for a data quality solution to meet its specific needs, focusing on native Salesforce integration. This was a non-negotiable requirement, as Xerox relied heavily on Salesforce for reporting and CRM analytics. The ability to create custom reports and maintain audit logs within Salesforce was crucial, allowing Xerox to tailor their data management processes to their unique requirements.

After evaluating several potential vendors, Xerox chose **Plauti Data Management (PDM)** for its superior integration capabilities and flexibility. Plauti’s solution provided the tools needed to clean and maintain Xerox’s CRM data effectively, addressing the company’s duplication issues and improving overall data quality.

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Results: improving performance and streamlining processes

Over the past two years, Plauti’s solution has met Xerox’s expectations, significantly improving data quality and, as a result, the performance of marketing and sales teams. With cleaner, more reliable data, marketing campaigns have become more targeted and effective, and client satisfaction assessments are now more accurate.

Hans shared that the solution “has met our expectations, providing the necessary tools to clean our data and improve our overall data quality.”

One of the standout features of PDM that has been particularly beneficial for Xerox is the

APEX plugin and the re-parenting of records. These features have ensured that merged records maintain their relationships across accounts, preventing data loss and maintaining data integrity. The automated data validation and merging processes have streamlined operations, making it easier for Xerox to scale its data management efforts as the company grows.

Future growth and lessons learned

With improved data quality, Xerox is well-positioned for future growth. The company can now handle incoming data more efficiently, ensuring that new information is validated and integrated correctly, thereby preventing duplicates' reintroduction and maintaining high data quality standards.

Hans van den Bosch reflects on several key lessons learned throughout this journey. He emphasizes the importance of communication and awareness regarding data quality across the organization. “Understanding the current state of data is crucial for planning and taking action to improve it,” Hans stated, noting how these insights have improved Xerox’s internal processes and positioned the company to maintain data integrity as it scales its operations.

For other companies facing similar challenges, Hans recommends ensuring everyone understands the data landscape and the importance of regular data validation. By fostering clear communication and transparency about data quality, companies can build trust and confidence in their data management processes, ultimately leading to better business outcomes.

Conclusion

Xerox’s partnership with **Plauti Data Management** has proven to be a significant success, enabling the company to overcome its data duplication challenges and improve overall data quality. As Xerox continues to grow and scale its operations, the solid foundation of clean, reliable data provided by Plauti will play a crucial role in supporting its ongoing success.

Curious to learn more? You can explore the full insights from Hans van den Bosch by watching the **recorded LinkedIn Live session**, where he delves deeper into Xerox’s journey with Plauti Data Management.



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