

Moody's Orbis for Salesforce

GET RICHER CLEANER B2B DATA

DESCRIPTION

Moody's Orbis for Salesforce delivers richer, cleaner B2B data in Salesforce that helps you sell and saves you time. We show you what companies do, who owns them, whether they're growing or shrinking, or may pose a risk to your reputation - and whether they're financially robust enough to pay you.

Moody's Orbis for Salesforce seamlessly blends our intelligence with information you already know about your customers and prospects, such as contract size, product(s) ordered, sales region, relevant salespeople, deal source and size, and future opportunities.

With Moody's Orbis for Salesforce users can:

- Learn, plan and find more business from this optimized data
- Use our analytics to understand what your best customers look like, where you can find more of them and what regions offer you most opportunity
- Target more effectively and have more relevant conversations with the right prospects
- Add on our Compliance Catalyst solution to help automate your due diligence and onboarding processes

HIGHLIGHTS

Moody's Orbis for Salesforce

- Delivers richer, cleaner data so that you can enrich and refresh your existing data and find the best companies to approach, based on financial data, what companies do, ownership and much more.
- Helps you find and prioritize companies most likely to buy from you. Our data helps you identify which accounts warrant the most sales time and avoid wasting sales time on companies that can't afford to pay you or that would fail your onboarding checks.
- Creates efficiency so you can liberate sales from CRM drudgery, making more time to sell. Our Connector reduces manual efforts and gives you better data.

USE CASE

Money Services Businesses (MSBs) – including foreign exchange and payments companies - often bring in a high volume of leads and have a large number of sales people. As a result, they can find it challenging to bring enough information into their Salesforce lead management environment and assign it to the right people. Manual processes and high volumes can cause numerous issues in the sales cycle, including a problem of duplicate entries in their CRM.

Such duplicates can be costly. For example, we helped a client discover that a £2 million sale was at risk because of duplicates in their CRM. In that case, two sales people prospected the same company and quoted different prices, which meant they nearly lost the sale to a competitor.

CHALLENGES FACED BY MSBS INCLUDE:

- Duplication of records in the system leads to time lost as sales people try to figure out which record is correct and/or multiple sales reps sell to the same prospects
- Manual lead management for a high volume of leads means sales reps don't get lead information fast enough for effective prospecting
- Inaccurate or out-of-date firmographic data makes it hard for sales reps to know which prospects to sell to first and for

HOW MOODY'S ORBIS FOR SALESFORCE CAN HELP:

- Our integrated application means that leads can be sourced directly from Orbis and imported into Salesforce in bulk. This not only reduces the time taken to source relevant leads, but also removes manual effort from the process.
- Importing necessary information directly from our award-winning Orbis database will mean Salesforce is populated with actionable information to segment leads and accounts effectively. This will help the sales team optimize their time and sell to the right companies.
- Each record is assigned a unique ID number from Orbis, preventing duplication as the Moody's Orbis for Salesforce can identify if the record is already in Salesforce.
- With more complete information available on accounts in your database, Marketing can perform better analyses to segment and profile more effectively.

Get in-depth information on Moody's Orbis for Salesforce on the AppExchange.

moody.com



528M
Entities



162M
Companies with assets, operating revenue, or employees (last 4 years)



49M
Private companies with detailed financials



2.7M
M&A deals and rumors



1.9B
Ownership links



462M
People