



Unlocking data integrity: Pavilion's triumph over duplicates with Plauti



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Managing data for 12,000 global members across 100 cities is no small feat. **Pavilion**, a nexus for the elite in sales, marketing, and RevOps, grappled with this every day. But a 6% duplicate member rate? That's where Plauti stepped in, transforming hours of tedious labor into streamlined efficiency. Join us on Pavilion's transformative journey.

Double trouble: The cost of duplicate emails

Sometimes, the simplest things can cause the biggest headaches. Pavilion ran into this very issue, with people using multiple e-mail addresses and inadvertently adding to the confusion. Tom Andrews, Senior Director of Systems & Insights at Pavilion, highlighted the real-world impact of this seemingly minor problem. "One of the main issues we had was in the member space. People sign up with different e-mail addresses. They might sign up with their work e-mail and then decide to switch to their personal e-mail. And it becomes really difficult for us to manage."

Tom further emphasized the significance of Salesforce in their operations. "So Salesforce is, in my opinion, the most important tool we've got internally. And alongside our actual platform, it's absolutely crucial." He added, "It (historical CRM) served its purpose while the company was growing, but we needed the additional capabilities that Salesforce has as well as its partner ecosystem of really powerful tools and apps to help us really fix the data quality, but get ourselves into a position where we could mine insights from our large member base."

The resulting mess wasn't just about juggling e-mail addresses. It was about facing the ripple effects these duplicates created. Overlapping accounts meant potentially lost data, confused billing processes, and the looming risk of an upcoming digital product launch. It wasn't just a tech problem—it was a growth problem.

Rupa Sunkari-Partridge, Operations Analyst at Pavilion, weighed in on the depth of the issue, sharing that "We have many members that are in our database but aren't active. Merging the active member Dupe (duplicates) is more important at this moment in time than merging non-active members."

Given these complexities, how would Pavilion declutter its data landscape and ensure it remained poised for the next leap in its digital journey?

Taming the duplicate beast

As Pavilion prepared to transition to Salesforce around the year's end, the data management challenge loomed large. Amid the transition, an alarming number of duplicates surfaced in the data—a whopping 25,000 records, to be exact. The magnitude of this task was colossal; sifting through such a vast amount of data was near impossible. While the migration offered a golden opportunity to cleanse and only migrate the best quality data, the volume was too extensive to manually curate. The sensible approach? Transfer the data to Salesforce first and then deploy a tool to refine the existing data and prevent future duplications at their inception. With this roadmap, Pavilion was poised to tackle the issue head-on, ensuring a smooth and efficient migration.

Plauti's deduplication solution integrates seamlessly within Salesforce, offering 20+ matching algorithms to ensure not a single duplicate, whether obvious or hidden, slips through. It's the gold standard for data management.

What was particularly striking about Plauti was its integration capability. For Pavilion, the standout feature was the fact that Plauti operates right within Salesforce. This allowed Pavilion to identify potential duplicates as they entered the system, marking a shift from a reactive approach to a proactive one.

Tom underscored the significance of this feature. With members often juggling multiple e-mail addresses over time, it was paramount for Pavilion to view all such e-mail records holistically. Plauti enabled them to see a unified view, helping them to understand their members more nuancedly.

"So, it (duplicated records issue) gave us challenges with billing information because someone's billing account might be different to like their actual account. So, when members we were e-mailing saying, hey, you've not paid your bills, but they had just through a different e-mail address."



Tom Andrews
Senior Director of Systems & Insights at Pavilion

Power features and tangible benefits

When Tom was asked about the features of Plauti that particularly stood out for Pavilion, he recalled his long journey of managing Salesforce systems.

"The main feature of Plauti that we loved and was absolutely key to our use case that I've not seen in other parts of the market is where we were able to take multiple e-mail addresses from multiple fields, put them together into like one Mega e-mail field and use that to detect the duplicates. Because as I said before, some of our members have up to seven e-mail addresses in file. It might be that I have to check on a record where the e-mail is in one field, and compare it to an e-mail in a different field, on a different record."

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Rupa Sunkari-Partridge
Operations Analyst at Pavilion

Picking up the thread, Rupa chimed in with her firsthand insights on Plauti. "Being able to filter each job we run just to get the data we need is crucial. We have many members in our database who aren't active. Right now, merging active members is a higher priority than the inactive ones. The capability to filter this is really handy."

Pausing for a moment, Rupa's eyes lit up as she recalled her early interactions with Plauti's onboarding program. "I distinctly remember our initial call when we first got the product. We were walked through the entire platform, and how we can sort of customize it to our own benefit." She added, "For example, the quick merge is able to customize merges as per the rules that we set for each field."

The transformative power of data cleanup

Integrating Plauti into Pavilion's system was a game-changer. "Among the active members in their data, Plauti revealed that almost 6% were duplicates". This percentage represents 350 duplicate entries. To put that into perspective, Tom estimated that without Plauti's deduplication feature, addressing each duplicate would've taken about five minutes. Doing the math, that's nearly an entire workweek saved just on cleanup!

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“ We were able to identify that around six percent of our active members had associated duplicates, which we then merged. This amounted to around 350 duplicates for the main set of our members. Now, while that number doesn't sound super high, consider this: if we had migrated that without addressing it first, it would have likely taken us about five minutes to resolve each one. This means we saved the operations team roughly 29 hours. ”



Tom Andrews

Senior Director of Systems & Insights at Pavilion

But the benefits didn't stop at mere time savings. Both Tom and Rupa felt a deeper, more profound change. There was a renewed confidence in their database. Knowing that they were working with clean, reliable data brought with it a sense of assurance. It wasn't just about efficiency; it was about building a stronger, more dependable foundation for their members. This clean slate didn't just optimize backend operations; it promised every Pavilion member a smoother, more refined experience. The database wasn't just tidier; it became a well-oiled machine, instilling a robust foundation of trust and reliability in their data.

Conclusion

For Pavilion, the integration of Plauti was more than just a technological enhancement—it was a transformative business experience. Tom couldn't emphasize this enough. "I was really impressed with the entire process. Plauti's team was amazing. They were so helpful," he effusively shared. His enthusiasm didn't stop there. Delving deeper into the user experience, he stated, "The entire onboarding process was really seamless. And overall, the product is exactly what we need. It is probably in a better way than I expected. It's got a nice interface, UX is well designed. It's easy to configure."

This feedback underscores the pivotal role that a well-integrated solution can play in addressing technical challenges and reshaping the user's experience. For Pavilion, the hours saved and the duplicates merged were just the tip of the iceberg.

The real victory was in the seamless user journey and the newfound trust in their database. As they continue to scale and cater to their global members, they can rest assured that their data infrastructure is robust but also refined and reliable. Wrapping up his sentiment, Tom aptly said, "I am really happy over all of the entire experience."



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