dqe
data quality everywhere

WHITE PAPER

DATA QUALITY & CRM

Focus on augmented CRM

3 key questions about your CRM for understanding the added value of data quality.





www.dqe.tech

INTRODUCTION

The performance of your CRM is closely correlated to the quality and reliability of the customer data that feeds into it.

Indeed, a CRM tool cannot function without data that is qualified and unified. When a customer database contains more than 10% in duplicate records, and 25% of its contact emails are incorrect - proportions observed by our teams in companies that have not applied data quality - the CRM tool cannot perform miracles, and propagates bad data quality in your different systems. Consequently, users cannot take full advantage of the added value of the tool, because they cannot trust the data they are using to serve the customer relationship.

Instilling data quality in the CRM tool can turn this situation around.

In 3 key questions, this e-book offers you a look at everything you need to know to create value in your CRM tool thanks to data quality.





Why doesn’t your CRM tool qualify the customer data itself?

A CRM tool is more efficient with data that is qualified and unified. Far from commonplace, this statement gives rise to a first question: can’t the CRM tool automatically deal with the quality of the data it uses?

Here are several reasons why a CRM tool needs a dedicated data quality solution to make customer data reliable:

Among its processes, your CRM tool includes data control

✕ FALSE

CRM tool vendors have a specific mission: to provide the software and technology to manipulate customer data according to customer relationship business processes. Their scope stops where data content begins. In other words, the customer data belongs to the company that holds it, and its CRM tool is not designed to intervene in the data content itself.

There are no strong data quality functions in a CRM

✓ TRUE

According to companies that produce CRM tools, some customer relationship tools include some data quality functions. These are often very limited. An example with deduplication: a CRM tool can identify duplicates only if they are perfectly accurate on a single criterion - usually the customer's name or email address. Far from being able to handle all types of duplicates, CRM tools do not have the processing power required to unify very large databases of several tens of millions of customers. The data quality capabilities of a CRM tool remain rudimentary and incomplete, because data quality is not its vocation.

Only 32% of executives and 27% of employees believe their CRM tool currently provides verified data

Forrester study, 2022

This is why a specialized data quality solution is needed to compensate for the data quality deficiencies of a CRM tool!

Customer data in a CRM tool is exposed to various quality flaws

✓ TRUE

In any business, customer contact information is exposed to too many flaws in the processes, themselves generating erroneous data. Human errors in data entry, changing phone numbers or addresses, importing databases that are of poor quality... All databases are subject to the problems that come from recording bad data. In terms of duplication, its share averages between 5 and 10%. At 10% and above, a critical threshold is reached at which the effectiveness of customer contact and marketing programs and decision-making is degraded. Dealing with the quality of CRM data is therefore a vital need.

Integrators can add data quality to the CRM tool in a specific project mode

✕ FALSE

Data quality and its solutions remain expert subjects. For the company, entrusting a data quality project to non-specialists exposes it to several possible setbacks. One of the reasons is that a non-specialist does not have a vision of all the needs associated with data quality, nor the hindsight on the technical issues, processing times, and pitfalls to avoid at the Proof Of Concept stage, etc. The best strategy for a successful data quality project is to use a specialist solution that has already been developed and tested, is immediately operational, and is delivered with comprehensive support and expert advice.



How does data quality boost your CRM tool?

Having your own customer data in the CRM tool is an obvious asset to being better able to use it effectively.

In detail, CRM tools augmented by data quality have 7 additional factors of value:



Reliable, actionable customer data

The users of your augmented CRM tool work with data that is clean and contacts that are verified and reachable, at all times, regardless of the source. Indeed, the best data quality solutions intervene at several levels: curative cleaning of the database, real-time control of data entries, qualification of data when it is brought back into the CRM tool from other systems. In any case, the data is reliable. Increased efficiency (and satisfaction!) for users, increased deliverability for communication campaigns, and the path is cleared for new initiatives for leveraging customer data.



360° view of customers

With the support of a data quality solution, your CRM tool can (finally) deliver a unified and exhaustive view of customers and propose the company's Golden Record. This is achieved through optimal deduplication of duplicates and unifying reliable and controlled data. An advanced data quality solution can identify duplicates based on reconciliation keys with high granularity, customized for your company. The notion of fuzziness and contextual content is taken into account. The unification of duplicates is also customizable, ensuring that no customer is lost, and that duplicates are kept when a customer needs to be present in the database via several accounts.



Real-time control

In CRM tools, activity involving data elements is constant. Even though curative treatments allow you to clean up a database at a given moment, their frequency is not necessarily sufficient to avoid entering erroneous data into the database and creating duplicates that disrupt operations between two treatments. Today, data quality must also be played out in real time at the input level. The instantaneous control of data entries and the real-time identification of the existence of a customer in the database are data quality imperatives for controlling customer data at all times, without creating unnecessary duplicates.



Autonomy on data quality rules

The best data quality cannot be done blindly. This is why augmented CRM tools must give the company control over the configuration of deduplication and unification rules. Configuring is not everything, and understanding the configurations is particularly important. The support of a specialist to ensure a transfer of skills is therefore necessary so that CRM tool users know how to adjust the data quality according to the constraints of their business. Our advice: avoid solutions with unclear processes, requiring complex development and long-term dependence on experts.

Informed decisions

In terms of autonomy, the augmented CRM tool also offers reporting capabilities and dashboards dedicated to customer data quality, generated by the data quality solution. Thus, CRM tool users benefit from complete statistics and key indicators to closely monitor the quality of customer data, its evolution and details for each deduplication rule. The advice of a software company specialised in data quality also helps to define the right KPIs - in particular, to track the increase in deliverability, the decrease in duplicates created, but avoiding inciting sales teams to create new customers, a process that generally results in the creation of duplicates. This gives the company the tools for making the right decisions when it comes to data governance.

Financial interest

A CRM tool that is enhanced by data quality is a source of significant savings! On the one hand, because it eliminates several shortfalls. With data that is qualified and unified, the ROI of communication campaigns is optimized, control is gained on customer knowledge, and customer service is personalized, among other benefits. Soliciting prospects wisely, knowing and recognizing customers avoids losing them, as well as losing their loaded shopping carts and their repeat business. On the other hand, instilling advanced data quality in CRM tools avoids the costs of inadequate stopgap solutions, such as re-contacting all customers whose contact information is identified as incorrect.

Ease of integration and use

Simplification is one of the keywords for data quality in augmented CRM tools. The integration of a data quality solution in the CRM tool should contribute to this simplification, particularly when repatriating the processed data to the CRM database. A solution that is natively designed to integrate with the CRM tool, with technological compatibility and respect for data security, makes all the difference here. It provides users with an easy-to-use interface and allows them to work on data quality in just a few mouse clicks. In other words, it is much more difficult to augment your CRM with a data quality solution that is cumbersome to integrate and complicated to use.





What difference does augmented CRM make in its use cases?

When customer data is qualified and unified, the CRM redistributes this quality to all the information systems with which it communicates. It becomes the reference tool for reliable customer data for all users: the Golden Record, a unique source of truth about customers.

Augmented CRM, augmented use cases, as illustrated by 3 feedback responses from our customers.

USE CASE 1

Qualifying and unifying the customer database in Salesforce to support digital projects

The Hess Automobile group markets new and used vehicles of some twenty brands in more than 80 sales outlets in France. In a very competitive market, the group has decided to accelerate its digital transformation, in particular to implement its e-commerce activity.

The issues

"Salesforce has been in the group since 2015, but many potential digital projects were still sitting on the shelf. A reliable customer database was lacking, which is essential for eCRM, e-commerce and digital marketing projects that are strategic for strengthening the group's position in the automotive sales market", explained Simon Amaniera, Group Chief Digital Officer, Hess Automobile.

The solution

Cleanse customer contact data elements (email, address, phone number), and deduplicate and unify them. *"DQE helped us define the deduplication and merge rules specific to our business. We have defined 400 processes that can be automated in our Salesforce tool, to create a Golden Record that can be used throughout the group."*

The results

- Now, all Salesforce user departments at Hess Automobile share the same 360° view of customers, a major collaborative advantage. *"Today, the majority of internal departments now refer to customer data in Salesforce in their missions."*
- Hess Automobile can now bring its digital projects to life from its platform that combines Salesforce and DQE, hosted in the Heroku cloud.
- Customers can retrieve their information, transaction history, and access the same data online as Hess Automobile's Salesforce-enabled departments, including dealerships. *"This consistency is important in customer relations and will help Hess Automobile to be even more successful!"*

USE CASE 2

Increased operational efficiency for all CRM tool users

ROSSEL ADVERTISING FRANCE

Rossel Advertising France is the advertising innovation center of the Rossel Group, the leading media group north of Paris. Its experts support advertisers in building their media projects and in the creation of their content, and rely on the distribution power of the Group's strong brands, both nationally and locally: La Voix du Nord, Paris-Normandie, L'Union, and 20 Minutes.

The issues

In addition to the data inherited from different systems, the group also imports the databases of acquired companies into its CRM tool, hence the need to control and standardize customer contact data in its Salesforce database, the Unique Customer Repository, where the various business lines coexist. *"We need dependable, standardized contact data to reliably identify customers when a user searches the Salesforce database"*, explained Ivelina Burden, director of Organization and Process.

The solution

Quality control in preventive mode on data entry and in curative mode, in particular to clean the imported databases of acquired companies. The UCR in Salesforce has been made reliable for its postal addresses in France and abroad, email addresses, telephone numbers, titles, and the company information of its B2B customers.

The results

- When a customer accesses the web portal, the data are already checked in the customer file, which guarantees the identification of the customer.
- The legal information field of client companies is pre-filled by simply performing a call on the registration number or the company name. Sales representatives avoid tedious research to enrich customer files, and can identify each company without guesswork.
- Marketing campaigns benefit from reliable email addresses, even for customers from databases reintegrated after acquisitions. *"The deliverability rate of our marketing campaigns increased from 91 to 98.9% in 2022."*

USE CASE 3

Making data reliable and enhancing the value of the Golden Record at the heart of CRM

The leading building materials retail group

This leading building materials retail group represents some 20 brands and has a network of more than 350 sales outlets in France. In a multi-brand context, its customer files are complex, with variations by branch according to account types. In addition, the group's customer data is spread out over several dozen applications, including the branch sales management tool, which captures most of the customer data.

The issues

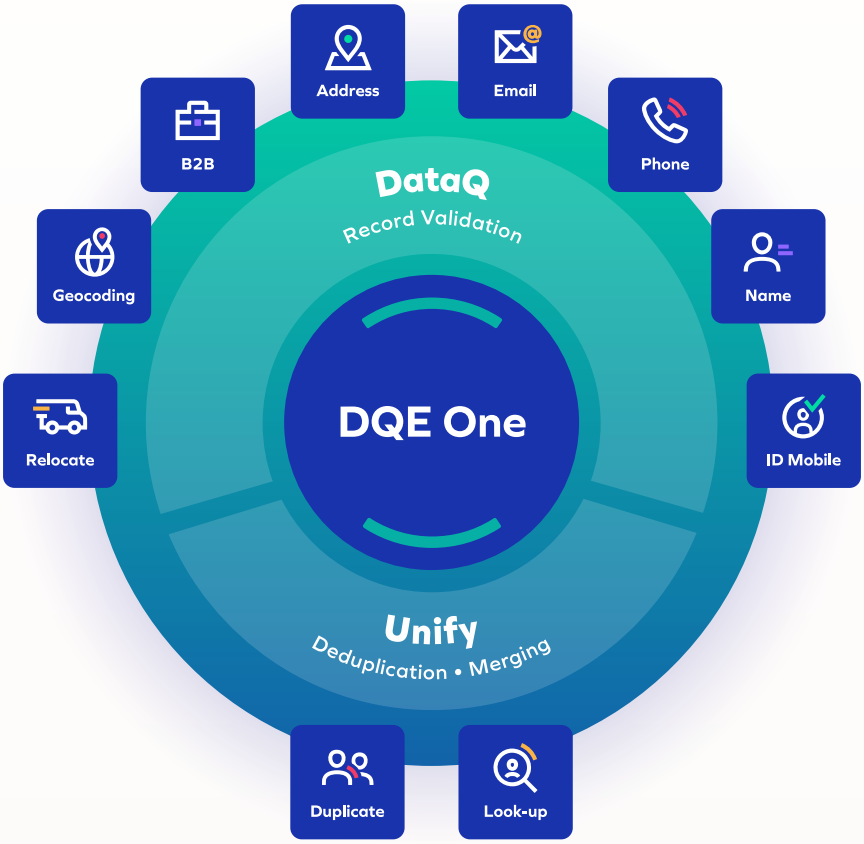
The group needed to centralize all of its customer data to better make use of it, simplify account openings and improve the targeting of marketing campaigns. This B2B retail leader decided to launch a Unique Customer Repository project in Salesforce based on the UCR not handling duplicates in the database.

The solution

Rectify customer data and deduplicate it thanks to *"the Data Quality solution capable of pre-feeding a maximum of 400 configurable fields in our customer files and performing deduplication according to the complex rules of our multi-brand group"*, explained the group's data project manager.

The results

- With native integration in Salesforce, DQE solutions allow users to not only work with a qualified and reliable database, but also to maintain it by controlling new entries in real time.
- This B2B retail leader can finally identify unwanted duplicates that neither its teams nor the customers themselves could spot. *"We can (...) now make our UCR in Salesforce into a true Golden Record."*
- *"DQE allows us to ensure the reliability of incoming customer data in all the account opening processes in force in the group."*



About DQE

Founded in France in 2008, DQE Software (DQE) is the vendor of DQE One, a modular data quality management solution.

Our solutions are specialized in BtoC and BtoB customer contact and identity data. DQE One controls the quality of data including last name, first name, e-mail address, telephone number, postal address, and legal data. DQE One includes two product lines: DataQ, a contact data quality solution, and Unify, a deduplication solution.

Across all industries, DQE helps organizations ensure that their customer data is reliable, and accessible to everyone, at all times. DQE One stands out as the most powerful data quality solution on the market, capable of managing databases of several tens of millions of contacts. Each year, our processing represents over 3 billion queries with an average response time of 150 milliseconds.

DQE One relies on powerful engines and algorithms that benefit from over 10 years of experience. The solution interfaces with more than 240 international databases for the postal address portion. Natively, DQE One offers connectors with solutions such as Salesforce, Microsoft/Dynamics, Cegid, Magento, etc. Our algorithms work on all our customers' clouds: Heroku, Azure, AWS, and GCP.

DQE One is used by a wide range of business lines (CRM teams, Chief Data Officers, Chief Digital Officers, CIOs, customer relationship managers) for more than 400 clients. Among them are several listed companies and well-known brands such as Groupama, EDF, BUT and Belambra.

For more information, visit www.dqe.tech/en and follow us on

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