

Revenue Data Operations Enterprise Evaluation Guide



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Enterprise Evaluation Guide: Revenue Data Solutions

You have loads of revenue and customer data coming at you from multiple applications, all the time. But most of it isn't useful – and often, it isn't trusted. You must decide what to save, where to save it, and how it all connects to deliver a reliable view of customer relationships. Then, you need to get it back to the applications that your teams use so they can better support your customers.

In a perfect world, CRM and the applications we rely on daily work together seamlessly – according to your dataflow and security requirements. But the truth is that revenue and communications stacks –CRM and business suites– don't get along without the missing piece that ties them together: revenue data operations.

The challenge lies in finding the right Revenue Data Solution – one that satisfies your Go-To-Market teams, their managers, IT, corporate privacy and security officers, and regulators.

Maybe you're here because you're already responsible for one – and it's not working. Or maybe you're in charge of enhancing your organization's revenue operations capabilities – and you're not sure where to start. Getting a handle on those answers is what this guide is all about.

What Are Your Organization's Priorities? What Are You Trying to Achieve?

There is much to consider when selecting a revenue data solution to align your platforms, people, and processes and deliver a better, more consistent customer experience. Contacts, conversations, and meetings come together to form relationships. Tasks, meetings, and sales motions come together to form pipelines. But how do you gather all of the data points to make a complete picture that can become actionable?

It starts with creating – or restoring – data trust through strong data governance principles, including advanced curation, context building, and unification. It calls for leveraging both automation and human intelligence to build a continuous data refinement process, deliver a reliable view of relationships, and improve productivity. It also requires speed, security, and support to orchestrate customer data at scale, which are often the deal breakers in complex enterprise environments and regulated industries.

Here is a checklist to ensure you can conduct an evaluation designed to catch the “beyond the obvious” questions.

Can Your Solution:		Alternative
CREATE DATA TRUST		
Connect Data Silos		
Offer options for automatic and manual sync of emails, calendar events, contacts, and leads to CRM?	☒ Yes. Riva allows emails, calendar events, contacts, and leads to be both manually and automatically saved to CRM.	☐
Support multiple CRM and email instances?	☒ Yes. Riva supports multiple CRM and email instances.	☐
Support cloud, on-premise, and hybrid cloud deployments?	☒ Yes. Riva supports cloud, on-premise, and hybrid cloud deployments.	☐
Support all major CRM and email platforms?	☒ Yes. Riva supports all major CRMs (Salesforce, Microsoft Dynamics, Netsuite, Oracle, and more) and email platforms (Outlook, Gmail, Notes).	☐
Create Good Data Out of Big Data		
Implement strong data governance principles throughout your organization and its systems?	☒ Yes. Riva combines automation and human intelligence to create a continuous data refinement process that follows complex dataflow requirements.	☐
Create an up-to-date, reliable contact address book across applications and devices?	☒ Yes. Riva forms a seamless data connection between CRM and business suite applications.	☐
Add meeting attendees who are not contacts to be added to the system automatically – across platforms?	☒ Yes. When new contacts are added via the Riva Data Ops Engine, they're automatically added to all.	☐
Block internal/ newsletter/ blacklisted emails from syncing with CRM?	☒ Yes. Riva allows selective, seat-by-seat control of all sync activity.	☐
Automatically save an email thread and all future emails related to that thread?	☒ Yes. Riva intelligence automatically saves email and interconnects related emails.	☐
Update delegated/shared calendars between platforms?	☒ Yes. Calendars and their related ownership structures are automatically synced between platforms.	☐

Create and map advanced categories of meetings for enhanced reporting, visibility, and pipeline understanding?	☒ Yes. Individualized settings allow comprehensive tailoring of meeting categories.	☐
Sync recurring meetings in Salesforce?	☒ Yes. All calendar events, including recurring meetings, are automatically synced to Salesforce - unless the user or administrator specifically excludes them.	☐

Create Up-to-Date Source of Truth

Provide near real-time sync?	☒ Yes. Riva sets the industry standard for up-to-the-moment data access (nearly every minute).	☐
Generate call reports from appointments, emails, and tasks?	☒ Yes. Riva allows for highly customized reporting – using up-to-the-minute appointment and email data.	☐
Allow for easy creation and edits to customer data through the Inbox sidebar?	☒ Yes. Riva leverages your users' human intelligence against automations to create a continuous data refinement process.	☐

Meet Privacy, Security, and Regulatory Requirements

Assure you that none of your customer data is stored?	☒ Yes. The Riva Engine is a policy-driven, rules-based centralized pass-through architecture that stores no customer data.	☐
Promise Third-Party Auditing and SOC2 Attestation?	☒ Yes. Riva is externally validated to meet the criteria for managing customer data based on trust principles of security, availability, processing integrity, confidentiality, and privacy.	☐
Apply GDPR data privacy requirements to your implementation?	☒ Yes. Riva's deep experience with industry-specific and global regulatory requirements – including GDPR – ensures data privacy and full compliance.	☐
Deliver a secure, compliant UX before surfacing any customer data?	☒ Yes. Riva's Enterprise Systems Design marshals all systems communication through a centralized API Gateway.	☐

Allow administrators to monitor and control individual access to and use of customer business data between platforms you seek to connect?	☒ Yes. Riva is designed to provide detailed, seat-by-seat, and global administrative control of access to specified data.	☐
Sync contacts across departments with access rights controlled by role and/or employee?	☒ Yes. Riva allows full administrator transparency, with the ability to customize seat-by-seat control.	☐
Ensure storage of meeting attendees, topic, agenda, etc., while restricting retrieval by role for sensitive information that would trigger SEC rules?	☒ Yes. Riva is designed to automate governance rules and administrative restrictions, preventing unauthorized access to secure information – and honor all SEC rules to avoid sanctions.	☐
Upload email attachments to external cloud storage for compliance purposes.	☒ Yes. Riva can be configured to redirect attachments to external storage.	☐

Build A Reliable Pipeline Report

Improve accuracy for KPI dashboards through better management of contacts, conversations, meetings, and relationships?	☒ Yes. Because Riva curates for context and stores data where pre-configured dashboards can read it, we improve dashboard accuracy.	☐
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IMPROVE PRODUCTIVITY

Avoid Manual Data Entry

Auto-save and manually save emails, calendar events, contacts, and leads to CRM?	☒ Yes. Riva allows emails, calendar events, contacts, and leads to be both manually and automatically saved to CRM.	☐
Tailor the automated and manual sync settings to support default and custom fields and objects?	☒ Yes. Riva adapts to your custom dataflow requirements and can tailor which fields or objects are synced or surfaced.	☐

Remove Workflow Friction

Surface CRM data inside of Outlook	☒ Yes. Riva's Insight sidebar brings CRM data into the workflows Go-To-Market teams use most.	☐
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Surface CRM data about contacts, accounts, and more following complex role-based customizations?	☒ Yes. Riva allows full administrator transparency, with the ability to customize seat-by-seat control.	☐
Make client information from custom objects in CRM available in sidebar.	☒ Yes. Our integrated side-panel interface surfaces your import CRM objects inside email and calendar views.	☐

Meeting Transparency & Management

Deliver an enterprise-level calendar booking solution?	☒ Yes. Riva Bookings delivers sophisticated booking features integrated into the sidebar, and into the Riva Data Ops Engine.	☐
Improve reporting and analysis of meeting roles and attendees?	☒ Yes. Riva relates meeting attendees across platforms to leads and contacts in CRM.	☐
Automatically store meeting notes, and distribute them to meeting attendees?	☒ Yes. Meeting notes are stored, and unless otherwise restricted, are distributed to meeting attendees.	☐
Deliver cross-platform automation of meeting management?	☒ Yes. Meetings are automatically saved cross-platform, allowing access from each application.	☐

SUPPORTED SCALE

Make Existing Systems Work and Connect With Each Other

Connect CRM and Email/Calendar applications – allowing teams to work where they see fit?	☒ Yes. Riva surfaces relevant, contextualized data from all interconnected applications, allowing one-click access to more in-depth data on related application screens.	☐
Offer deployment options that support data residency requirements (including Data Center (On-Premise), Multi-Tenant Cloud, and Single Tenant Cloud)?	☒ Yes. The Riva Data Ops Engine can be deployed per your requirements.	☐

Make Managing Enterprise-Level Data Easier

Provide real-time or near real-time sync at scale?	☒ Yes. Riva sets the industry standard for up-to-the-moment data access – we consistently execute at 25,000+ simultaneous users/clients. Our largest deployment is 47,000+ users.	☐
Deliver an extensive, continuously updated resource center and/or online knowledge base?	☒ Yes. Riva maintains a comprehensive online knowledge base, allowing customers to research answers to standard – and uncommon – questions.	☐
Support the entire onboarding process?	☒ Yes. From installation to integration and training Riva is laser focused on your time to value.	☐
Provide proven levels of support?	☒ Yes. Riva offers full Tier 1 support to all customers. We’ve managed to win Stevie Awards for three consecutive years and maintain a 99% average customer success rating.	☐
Provide annual health checks?	☒ Yes. Riva’s commitment to clients extends throughout the life of the relationship. Our annual health checks ensure customer satisfaction and to gather information on future improvements.	☐
Assign dedicated account managers?	☒ Yes. Each Riva account is served by a dedicated account manager tasked with maintaining open communication, resolving issues, and educating clients on Riva’s deep capabilities.	☐

We are Here to Help

The right tools make short work of any job. After reviewing our checklist, we hope you have a better understanding of what your organization’s priorities are and which job(s) you are trying to solve for. See below which Riva toolkit can help you achieve what you’re looking for.

Go-to-Market Teams

IT & Revenue Teams

Team Leads/Exec Suite

CISO / CSO

I want to better leverage the current Salesforce setup

I want to build a better, reliable pipeline report and gain better visibility over analytics that matter throughout the organization – out of the box.

I want to build a better, reliable pipeline report and gain better visibility over analytics that matter throughout the organization – adapted to complex data flows.

I want to leverage a trusted toolkit to develop Revenue Operations capabilities throughout the organization.

I want to reduce friction for customer interactions and improve productivity.

I want to adhere to complex security and compliance requirements from regulated industry.



RIVA FOR ACTIVITY ANALYTICS



RIVA FOR REVENUE OPERATIONS



RIVA FOR DATA COMPLIANCE

Not finding anything that’s a good fit?

RIVA FOR ENTERPRISE



Harness Customer Data to Drive Enterprise Growth.

No matter where you are in your evaluation process, Riva is here to assist. We've been at it for 12+ years, and with over 1,000 successful enterprise-grade projects, Riva has a proven track record of best-in-class deployments.



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