

The Salesforce Manager's Guide to Capturing Accurate Contact Data.

Verifying every email, phone number, and postal address
right inside Salesforce—the easy way.

Why Verify Inside Salesforce.

If you use Salesforce to manage your customer data and sales pipeline, you believe in a powerful idea: that you'll have better, more meaningful sales relationships if you build a central place in your business where all your customer and prospect data lives.

But that information is only useful if it's accurate. Unfortunately—and you probably know this all too well—a lot of the contact data in Salesforce systems is bad: inaccurate or outdated. And that undermines the very goals you set out to achieve: better engagement, and better sales. Here's what it looks like:

Bad phone numbers frustrate sales reps and waste their time as well as their faith in the leads that are coming down the pipeline.

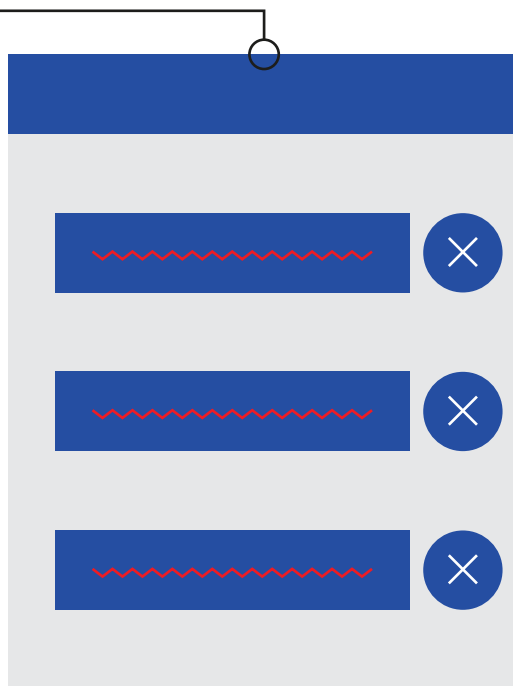
Bad email addresses mean sales can't reach prospects to send an offer or seize a ripe opportunity.

Bad postal addresses mean your products, invitations, direct mail, and personal notes never arrive.

Clearly, this is a problem worth solving.

Lead Detouring

Bad postal data has a special impact on companies that route leads based on accounts or territory. With inaccurate data, lead routing will be, literally, all over the place, with the right prospects never getting to the right sales people (or not getting there in time).



Step One

Why Verify Inside Salesforce.

How does bad data get in?

Clean, accurate, and up-to-date contact information is one of your most valuable assets. But bad data regularly finds its way into your system—usually in one of three ways:

- A salesperson enters it incorrectly—because they mistyped, or misheard.
- A customer (or a service agent, or team member) fills in a form inaccurately—deliberately or by accident.
- The data degrades over time because life—and contact data—goes on. People change numbers, move homes, get married, change or get new email accounts. Businesses merge, open new offices, etc.

It's pretty straightforward: bad data is either already inaccurate when it comes in, or it becomes bad when it's been sitting on your shelf for too long.

It's a no-brainer, really, to do two basic things to all of your email, phone, and postal addresses:

- Validate them as they come into your system, inside Salesforce itself.
- Routinely clean them up to make sure your data remains fresh.

That's what this guide is all about.

The Impact of Bad Contact Data

Inaccurate data creates quantifiable waste. Here's where it hurts:

Salesforce user adoption—your sales reps will trust your CRM less, which makes your whole system less effective. (They'll also consider those leads coming in from marketing as "junk" because they can't connect with any of them.)

Sales & marketing ROI—the campaigns you fight so hard to fund don't pay off.

Frustrated customers—your products, offers, and invoices never reach them.

Hard cash—products sent to the wrong address cost you money as your business has to pay for the return shipping.

Reputation—bounced emails and non-delivered pieces impact your sender reputation (hit too many spam traps and your IP address could get blacklisted).

Accuracy of analytics—you can't pinpoint which initiative works and which doesn't.

Step Two

The Quick Fix: Contact Data Verification.



The contact data quality problem has already been solved with a simple technology called contact data verification (or CDV). It checks

Emails, to make sure it really is a functioning address and won't harm your efforts by landing you on a blacklist.

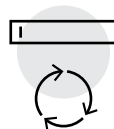


Postal addresses, by running the address and format against all the known addresses in over 240 countries and territories.



Phone numbers, making sure they really are accurate phone numbers—and checking what time zone your prospect is in so you don't call them up in the middle of the night.

All of this is automated, and happens in two ways:



1. At the point of entry—running the checks in real time as the data is manually entered into your systems.



2. In batch mode—running regular data health checks to identify bad data and to clean it up.

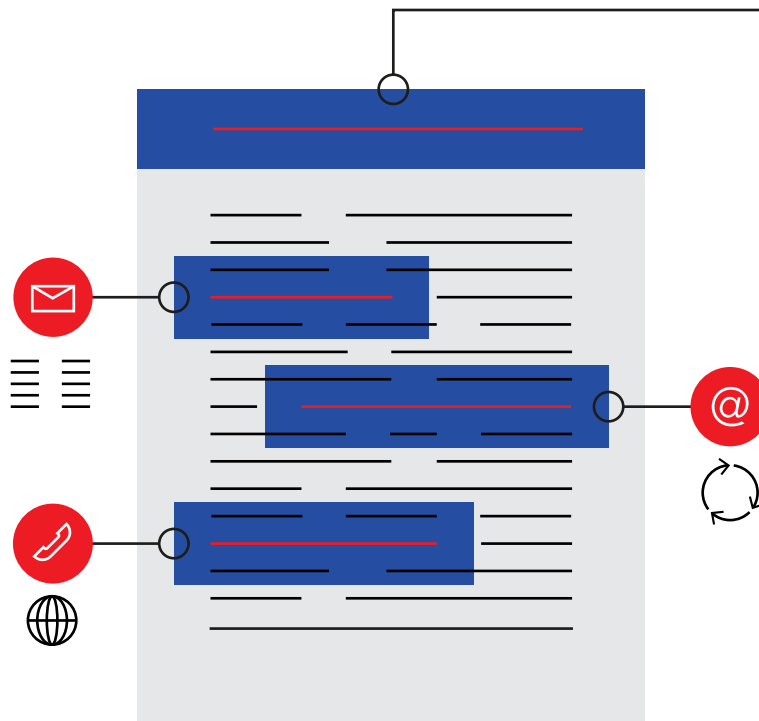
(We'll talk more about these two ways later.)

That's pretty much all you need to know about contact data verification. We've written this guide to show you how easy it is to add CDV technology into your Salesforce and achieve great data quality, instantly. For simplicity's sake, we're going to use Informatica Contact Data Verification solution as an example of how to add CDV to your Salesforce.

Ready? Let's go.

Step Two

The Quick Fix: Contact Data Verification.



Informatica Data as a Service: The Elevator Pitch

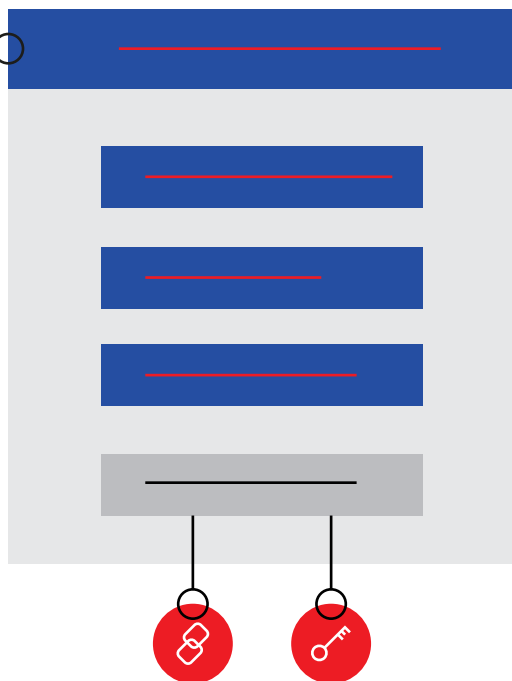
We're Informatica and we make the world's most comprehensive and robust contact data verification toolset.

- Address verification (a.k.a. AddressDoctor) is the only service that combines postal certifications from all five global postal organizations in one engine. And does so for over 240 countries and territories.
- Email verification (a.k.a. Strikelron) doesn't use stale databases. Instead, it validates them quickly and accurately directly with the domain (or with proprietary algorithms if the domain is trickier) and ensures there aren't threats to your database.
- Phone number verification checks the validity of phone numbers from more than 240 countries and territories. It also tells you what time zone the phone number is in so you don't call your customers to tell them about your latest gadget at 3 a.m.

Find out more by browsing our [product pages](#) or [getting in touch](#).

Step Three

How to deploy Informatica CDV in Salesforce.



How do you get CDV?

Our solution for contact data verification is called Informatica Cloud Customer 360 (or CC360) for Salesforce and it's really easy to deploy inside your existing Salesforce system. That's because we've created a pre-built integration for it. All you have to do is go to the Salesforce App Exchange site and subscribe to CC360 for Salesforce. We'll send you an installation link, a license key, and that's it: you're ready to go.

Three flavors of CC360

Informatica Cloud Customer 360 is a data quality tool that can do a number of things to get your Salesforce data in shape. In this guide, we're only discussing the contact data bit, but we thought we'd mention that CC360 can also master your Salesforce data (which is super useful if you're merging two or more Salesforce instances, or you're trying to get that single view of the customer in Salesforce).

Essentially, CC360 comes in three flavors:

Just CDV—you'll only need an Informatica Data as a Service license.

Just Mastering—you'll only need an Informatica Cloud license.

CDV + Mastering—you'll need both.

For more information, check out the [CC360 for Salesforce product page](#).

Step Three

How to deploy Informatica CDV in Salesforce.



How does Informatica CDV work?

The first thing to do is to define the data sets you want the app to validate for you—email, phone, or postal address. You can do any one, or all three. (We recommend all three—what value does an accurate address have if the email and phone number are both wrong?). After that, CC360 takes it from there. Here are the three main things it does:

1. Create an analytics dashboard

As soon you install CC360, it assesses your status quo by running analytics on your historical data. It then feeds its findings into your data quality dashboard. That's your central overview of the number of accurate vs. inaccurate records in your system.

(Once you get going with Informatica CDV, you can pull up the dashboard at any time to check on the status of your data validation runs, how your records have changed since the last batch cleanse, when the next one is scheduled, and a lot more. If you're keen on the details, watch a [video](#) about CC360 analytics.)

2. Validate on entry

This is the really nifty feature: from now on, every time you enter a new phone number, email, or postal address in Salesforce, the app will validate it for you in real-time. When you hit 'new' for contacts, leads, and accounts, you can 'click to verify' or 'save to verify', and it'll show you an icon to confirm verification. You can also run validation on an existing contact by hitting the edit button or the pencil icon on a Visualforce page.

With validate on entry, bad contact data never even enters Salesforce.

3. Batch cleanse your data

Batch cleanses are regular check-ups to identify and clean the records in your system that have gone stale. You can schedule batches to run in the background—as often as you want: quarterly, monthly, weekly, or even nightly (though, once you validate on entry, you won't need them that often). When batch cleansing, the app marks your data as valid or invalid, and gives you a reason code.

That's it. You're all set. That's really all you need to do to keep bad contact data out of Salesforce.

Conclusion

That Was Easy.

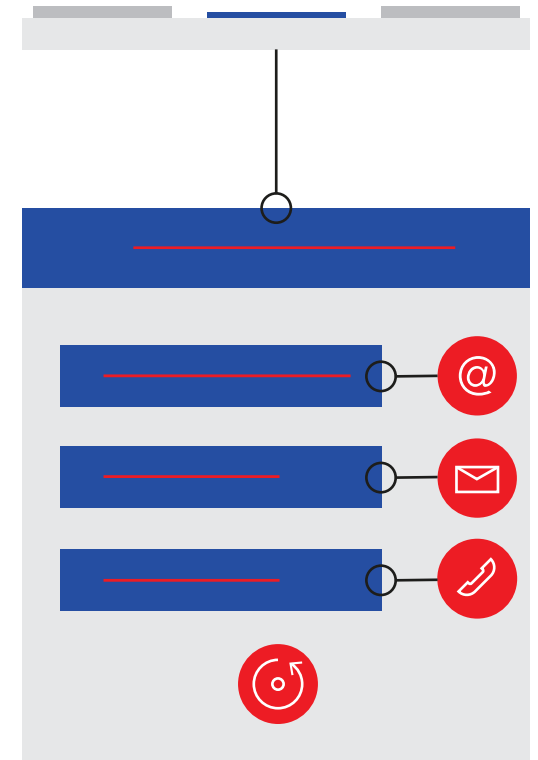
That's pretty much it: a simple journey to as-good-as-it-gets contact data in your Salesforce. It will save you all kinds of time, money, and pain down the road. Here's the logic:

Contact data matters—it's how you reach the most important people in the world: your customers and prospects.

Contact data verification is a no-brainer—it solves the problem for your email, postal, or phone contacts—or all three at once. It's accurate, easy, and doesn't cost very much.

CDV for Salesforce is CDV for Salesforce is easy to implement—just get Informatica CC360 from the App Exchange and push a few buttons.

There aren't many business cases as short and sweet as that.



Conclusion

Before You Go.

We're here to help.

If you're still not sure, or would like best-practice advice on any aspect of contact data quality—call the Informatica [Data as a Service](#) team. We're really, really good at this and we love helping.

Learn more.

Get our [data sheet](#) to learn more about Informatica Cloud Customer 360 for Salesforce with Data as a Service.

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