



The Client

IntelliFlo Ltd is a multi-award winning IT Software Company delivering a Software as a Service solution to the Financial Services arena. Their approach is rooted in best practice and delivering solutions from which their customers can derive real business value, as well as future proofing their operations in an ever changing and challenging market.



The Challenge

IntelliFlo approached CCR through the Salesforce partner network with the challenge of improving the data held within their Salesforce org. The challenge was clear and defined; however, the problem itself was due to various issues with current and historical data mismatches. This had an impact on the planning and delivery of marketing campaigns due to data consistency and quality issues.



Solution

The initial step before agreeing a solution was the extract of all Accounts, Contacts & Leads from within IntelliFlo's Salesforce account and the subsequent auditing of these files to assess the issue of data quality.

CCR completed a full data cleansing audit of the supplied files to highlight the number of issues to resolve covering duplicates, ceased trading business, data standardisation needs and address level verification. The reporting highlighted several areas for concern with the most notable being the issue of duplicate Contacts, Accounts & Leads.

In conjunction with the findings of the data audit report CCR completed cleansing of the data to flag duplicates, ceased trading and moved business, standardise fields and verify addresses. This work could then be uploaded into Salesforce to update records within the system. After this stage a major issue still existed in relation to the number of duplicated records within Salesforce. These records were flagged as part of the data cleansing, however, the management of duplicates needed to be addressed external to the data cleansing.

In order to manage the duplicates, CCR developed a custom application to control and amend a set of agreed master record selection and record merge rules, these rules were created by CCR in cooperation with IntelliFlo. Upon approval of the agreed rules, CCR set up an application in a staging environment and completed a test run of the duplication merge. These results were then reviewed to ensure that the initial created rules met the business needs of IntelliFlo and that the tolerance for an acceptable match was in line with expectations. Following on from the extensive review of the rules, amendments were made to correct inaccuracies within the initial test run. A rerun of the duplication merge test then took place for a secondary review. Client approval followed and all that then remained was the replication of the 2nd test run into the live environment.



Results

The initial auditing conducted by CCR drove the direction of the required solution and enabled resource and budget to be assigned where most needed. This auditing process highlighted over 10% duplication within the data and standardisation improvements to over 65% of the data. In addition to this, more than 6% of records related to ceased trading or moved businesses.

By using CCR, IntelliFlo were able to rely on a single point of contact to not only conduct the cleansing but also to import results after a rigorous testing process. Data is now updated in Salesforce.com and mailing campaigns can be conducting with total faith in the data quality.



Conclusion

IntelliFlo were able to access a unique set of services designed to manage all data quality issues and more importantly resolve these issues within Salesforce.