

# GET DATA STRONG

How Data-Centric Teams Drive Business Success





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# Introduction

As companies rely more heavily on data to run their businesses, it becomes important to harness the flood of incoming data. So what can you do to make sure your data is reliable, relevant, and useful? Putting data to work to create true competitive advantage begins with fostering a data-centric culture.

Data touches every part of your business, so each department needs to be concerned with its quality. Sales, HR, customer support, legal,

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*“Data is the raw material of everything firms do...[they] must invest heavily in building a next-generation customer data management capability to grow revenue and profits in the age of the customer.”*

*Forrester Research<sup>1</sup>*

finance, billing, and others must understand how data plays an important role in their day-to-day efforts. They should have the tools they need to put that data to good use. Guided by a thorough understanding of how data moves through the entire organization, each team must prioritize data stewardship.

## What Is Data Stewardship?

Data stewardship is about carrying out the rules and policies around the reliable handling of data. It also involves developing a strategy for data management roles.

**Read on to see how the sales, marketing, and CRM administration teams can build a successful data-centric organization.**





Chapter 1

# The Data-Centric Sales Representative

The front line of customer data

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Better leads and enriched insights give Sales Representatives a huge advantage. Data plays a key part in understanding and addressing the needs of the customer. Sales Reps and the organization as a whole benefit from information gathered and shared by the people meeting face-to-face with the customer.



## The Data-Centric Sales Representative

### Share your data:

Don't store data in your own spreadsheets, contacts, or notes apps. Sales Reps should put everything into the CRM, so it can be maintained and available to other stakeholders in the business. Sometimes data that seems unimportant can lead to valuable customer insights in a larger context. With advanced CRM features and mobile tools, you can log activity and information from anywhere, and get customer insights at your fingertips.

### Enter data with the push of a button:

By using data entry and enrichment tools, you are able to standardize customer information in your system, and ensure a full 360-degree view of the customer. It involves less manual entry for busy Sales Reps and creates more actionable, reliable data to drive better selling.

*"In our sales process, 75 percent of getting the order is showing up at the right time. Data.com enabled us to uncover opportunities that amounted to millions of dollars, and because it's in the application, we're able to easily integrate it into our lead generation process."*

*David McDermott, Director of Sales Enablement, Kelly Services<sup>2</sup>*

### Do your part to reduce dupes:

Eliminating duplicate records makes it easier to act on customer information. Before entering a new contact or account, check to see if the record already exists. Be aware of data standards and guidelines for creating and deleting records. Following your company's specific data protocol will ensure that you don't waste valuable time later acting on out-of-date or incomplete information.





Chapter 2

# The Data-Centric Sales Operations Professional

Keeping a finger on the pulse of all things sales

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Sales Ops relies on data for planning, modeling, and to support sales teams. They bring value to the organization by using accurate and relevant data to deploy Sales Reps as efficiently and effectively as possible. Their insights on territory and resource planning depend on in-depth data to provide a clear picture of how accounts are related to one another, and which products and services might best address their specific needs.





## The Data-Centric Sales Operations Professional

### Focus on accounts:

Sales Ops derives insight at the account level, so it's important to collect and maintain thorough and accurate account data to drive better strategy. Data-centric Sales Ops professionals use account data to determine the addressable market, and develop sales strategy, territory planning, and forecasting. Your account-level data will complement the contact-level data from sales and marketing. By focusing on the account-level, you ensure that those closest to the data are its stewards.

### More is better:

Complete and well-sourced customer data informs the best sales strategies. But going beyond just the standard set of attributes can help take those strategies to the next level. Look to both internal and external sources for deeper information on accounts, like financial index ranking, sub-industry codes, technologies used, website traffic or ranking, and more.

*"We have more visibility into our business than ever before. Now we can analyze sales cycles, size of accounts, and industries, and use that data to focus where our Sales Reps should prioritize."*

*Kathy Coates, VP of Platform Sales Technology, Cenveo<sup>3</sup>*

### Play well with Marketing Ops:

Sales Ops oversees the timely transfer of data from marketing to sales. Accurate and complete data helps Sales Ops work efficiently with the marketing team to define the requirements for passing a lead through each stage, as well as establishing who touches it along the way. Nailing down detailed timelines for capitalizing on valuable sales opportunities will help you reach organizational sales goals easier and faster.





Chapter 3

# The Data-Centric Marketer

Creating campaigns guided by data and insight

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With better data, marketers can identify accounts that share similar needs and tailor campaigns to that audience. Effective marketing strategy and campaign performance rely on thorough, up-to-date, and accurate data on industries, corporate relationships, and other key values. Sophisticated targeting and segmentation stems from well-rounded profiles on all of your customers and prospects.







## The Data-Centric Marketer

### Enrich the data:

Make sure you gather and maintain enough lead data to take targeted action. Having the right title, department, and function — and tying them to account-level details like industry, company size, and corporate linkage — will result in marketing programs that generate better leads. Build comprehensive customer profiles by connecting relevant, related data points to truly personalize marketing campaigns.

### Uncover insights through analytics:

Good data is more than facts and figures on a single customer. It can tell you a larger story about the customer experience. A data-centric marketing department will focus efforts on gathering and maintaining data that can give them insights into the market overall. They will want to be able to segment and prioritize targets by personal data, like job title, or account attributes, like industry classification or company size. They will also look to rich data to more accurately track performance and identify where to direct resources.

*“Data.com and Pardot have allowed Field Nation to become a data-driven business by helping us capture intent, score leads, and gain insight into the customer’s desire all the way from lead to revenue.”*

*Billy Cripe, Chief Marketing Officer, Field Nation<sup>4</sup>*

### Make a clean hand-off:

It is crucial that marketing is completely aligned with sales and other data stakeholders, so everyone is working with the same information. Data silos make it difficult to incorporate accurate and up-to-date customer insights into marketing campaigns. Integrating systems and creating a clean flow of data will help create a personalized and meaningful customer experience from lead to sale — and happy customers are the best form of marketing.





## Chapter 4

# The Data-Centric CRM Administrator

## Better CRM adoption with less resistance

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When employees are making good use of data and the CRM system, you get improved efficiency and productivity. The challenge for the CRM Administrator is to make everyone's work more effective. By supporting a data-centric culture, you can help build trust in the CRM system and the insights it provides.



## The Data-Centric CRM Administrator

### Get value through flexibility:

While data safety and security are important considerations, data must flow freely in order to be put to good use throughout the organization. Data flow and CRM effectiveness suffer when concerns about duplicate records lead to restrictions or rules on who can create or edit records. Tools are available to block a new record or send an alert when a duplicate account, lead, or contact is created, so you can keep the CRM running efficiently without putting up barriers to data use.

### Make data a team sport:

An effective data strategy rarely comes from one department or a small group of people acting alone. Get input from all corners of the company to create best practices for organizing and improving the flow of data. Define the responsibilities of each team and establish standards for contributing, curating, and securing data. When CRM users have helped craft the data strategy, it is much more likely that they'll trust and make use of the CRM system.

*"We don't want to rely on our sales and service employees, or our customers, to be data entry people. With Data.com, they don't have to be."*

*William Dressler, Senior Architect, Time Warner<sup>5</sup>*

### Create one source of all truth:

Merge data across channels and teams, integrating both internal and external sources, to make a single repository of trusted customer data. To help maintain and organize this source of truth, you can use unique identifiers for accounts, like the DUNS number. With data kept lean and complete, your CRM will use less storage and show a stronger return on investment.



## Conclusion

Building a data-centric culture requires a shift in perspective and buy-in from teams all along the data supply chain. Data is a valuable resource that needs to be maintained at every level. A data-centric culture fosters a shared responsibility for protecting and enriching data. An organization that drives home the value of data for each and every role in the company will be better prepared to compete and build its customer base.

## ABOUT SALESFORCE AND DATA.COM

Salesforce Data.com is the premier source of business-complete contact and account data, providing the best business data directly inside the #1 sales application, Salesforce Sales Cloud. Data.com consists of the following:

Data.com Clean enables organizations to keep their Salesforce leads, contacts, and accounts current and complete by updating and enriching their existing records on-demand or on a scheduled basis.

Data.com Prospector provides comprehensive capabilities for Sales Reps and marketers to easily target new accounts and find decision makers with the ability to add new records to a Salesforce CRM instance with one click.

## SEE HOW SALES CLOUD AND DATA.COM CAN HELP YOU.

LEARN MORE

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<sup>1</sup><https://www.forrester.com/Content+Data+Should+Be+The+Lifblood+Of+Your+Enterprise/fulltext/-/E-res99101>

<sup>2</sup><http://www.slideshare.net/Salesforce/nucleus-research-value-of-data-quality-with-datacom>

<sup>3</sup><http://www.salesforce.com/data/customers/stories/cenveo.jsp>

<sup>4</sup><https://www.youtube.com/embed/ngVSbTb2hZl>

<sup>5</sup><http://www.salesforce.com/data/customers/stories/virtual-causeway.jsp>