



# CRM Connector

*Quality global, structured data in your CRM*

CRM is now, for many organisations, the core system to support Sales, Marketing, Analytics and Customer Experience programmes. Although classed as a mature technology, the investment in CRM is predicted to grow still further as more business processes become 'CRM centric', it links to other business critical systems and becomes a much smarter machine learning capable application.

The issues of poor quality data within a CRM system are well reported and yet it continues to hold many organisations back. Key business functions rely on a rich, common understanding of your customers to support the operational and strategic requirements of a business. Without this, the aspiration to help users find and utilise up-to-date data quickly and ultimately move the CRM to an AI-assisted, intelligent experience will not be realised.

## 7 CRM DATA MANAGEMENT BEST PRACTICES

In our experience of working with hundreds of clients, the following data-inspired, best practices will allow you to create business value from mastering your CRM data:

1

### **BASELINE YOUR EXISTING DATA**

*Match and enrich against a referential data source*

2

### **ADOPT A COMMON IDENTIFIER**

*One trusted view of a business entity throughout the lifecycle of the customer*

3

### **STANDARDISE AND CONTROL NEW RECORD CREATION**

*Search and perform duplicate check before creating Accounts with structured data*

4

### **ENRICH MASTER RECORDS**

*Real-time access to value-added data creates more informed decision making*

5

### **OVERLAY CUSTOMER HIERARCHIES**

*Provide critical clarity of a relationship*

6

### **MAINTAIN YOUR MASTER RECORDS**

*Data maintenance keeps your data current and consistent at all times*

7

### **LINK TO DISPARATE SYSTEMS & DATA SOURCES**

*Customer data in other systems and 3rd party data to support CRM centric business processes*

## INTRODUCING D&B CRM CONNECTOR

D&B's CRM Connector combines Dun & Bradstreet's market leading global business database and sophisticated, scalable technology. It allows an organisation to standardise Account data in a CRM and deliver the data and insight to effectively manage interactions throughout the customer lifecycle.

CRM Connector is natively integrated into Salesforce and Microsoft Dynamics 365 and provides:

- Consistent, global, structured data in your CRM
- Unique D-U-N-S Number© identification
- Ability to search on a company before you create an Account
- Account and Contact duplicate check
- Enrichment of records to drive insight and more profitable relationships
- Corporate hierarchy information to consolidate Accounts and identify whitespace
- Account refresh on an ongoing basis.

## HOW IT WORKS

### CLEAN

The first step is to match and enrich your existing CRM universe, flagging out of business and non-trading businesses and assigning the D-U-N-S Number identifier, which facilitates the identification of duplicates. Once loaded into your CRM, your Accounts will immediately benefit from pre-structured identification, firmographic and corporate hierarchy data to provide insight to support your business goals and decisions.

### CREATE

When creating new account records first search for the business on D&B's global database. You can identify whether a company is already present in your CRM through the CRM Connector's sophisticated algorithms which prevent duplicates. The definition of duplicates can be tailored to your specific requirements. You can also apply duplicate checks when creating new contacts.

Your Accounts will be enriched with the latest business information from the D&B global database such as activity codes, company employees and corporate ownership information, delivered in a consistent way with minimal data entry.

**New Account**

**Search**

**Company information**

DUNS

Registration Number

Company Name

**Company Address**

Address

City

Postal Code

Country

**Add Customer**

**Company information**

DUNS

Registration Number

Company Name

**Company Address**

Address

City

Postal Code

Country

**Salesforce companies (5)**

DUNS	Company name	Address	City	Postcode	Country	Add contacts
217518075	BERENDSEN PLC	1 Knightsbridge	LONDON	SW1X 7LX	United Kingdom	<input type="button" value="Add"/>
364935390	Berendsen Plc	3 Wade Road, Intec	BASINGSTOKE	RG24 8NE	United Kingdom	<input type="button" value="Add"/>
216601612	BERENDSEN PLC	364 High Rd	ILFORD	IG1 1QP	United Kingdom	<input type="button" value="Add"/>
364935382	Berendsen Plc	Portobello Road	WAKEFIELD	WF2 7JH	United Kingdom	<input type="button" value="Add"/>
214926458	BERENDSEN UK LIMITED	72 Thornliebank Road	GLASGOW	G43 1LB	United Kingdom	<input type="button" value="Add"/>

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Figure 1: CRM Connector search before create feature

**Possible duplicate(s)**

DUNS	Company Name	Street address	Postal code	City	Country
217518075	BERENDSEN PLC	1 Knightsbridge	SW1X 7LX	LONDON	United Kingdom

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The above client(s) are already in your system. Do you still want to add this new customer?

Figure 2: Account duplicate alert

## ENHANCE

With fields like trade names, address, industry codes, employee figures, and sales, amongst others, you will drive effective Sales and Account Based Marketing activities. Corporate hierarchy information is available to assist in consolidating prospect and account information at corporate group levels, ensuring sales and marketing activity is 'joined up' and managed effectively through the correct sales channels and account owners.

Your Account view will also show the Global Corporate Family view which provides an understanding of current relationships within the wider organisation and the whitespace opportunity.

**BERENDSEN PLC**

**D&B linkage information**

Company name   Domestic Ultimate	Company name   Global Ultimate
BERENDSEN PLC	BERENDSEN PLC
City   Domestic Ultimate	City   Global Ultimate
LONDON	LONDON
Country   Domestic Ultimate	Country   Global Ultimate
United Kingdom	United Kingdom
DUNS   Domestic Ultimate	DUNS   Global Ultimate
217518075	217518075

**Family Tree**

- 217518075 BERENDSEN PLC (United Kingdom, LONDON)
  - 364935382 Berendsen Plc (United Kingdom, WAKEFIELD)
  - 364935390 Berendsen Plc (United Kingdom, BASINGSTOKE)
  - 216601612 BERENDSEN PLC (United Kingdom, ILFORD)
  - 210212395 BERENDSEN UK LIMITED (United Kingdom, BASINGSTOKE)
  - 217441294 DAVIS (BIM) LIMITED (United Kingdom, LONDON)
  - 290088566 BERENDSEN NOMINEES LIMITED (United Kingdom, LONDON)
  - 218729953 BERENDSEN FINANCE (DKK) LIMITED (United Kingdom, LONDON)
  - 218729977 BERENDSEN FINANCE (EURO) LIMITED (United Kingdom, LONDON)
  - 308491617 Berendsen Textil Service A/S (Denmark, SOBORG)
  - 354072225 S. Berendsen AB (Sweden, Malmö)
  - 365861590 Berendsen A/S (Denmark, COPENHAGEN)
  - 365493823 Berendsen Tekstila Serviss AS (Latvia, RIGA)
  - 985564492 BERENDSEN FINANCE IRELAND (PLN) LIMITED (Ireland, Dun Laoghaire)
  - 985564493 BERENDSEN FINANCE IRELAND (DKK) LIMITED (Ireland, Dun Laoghaire)
  - 985564494 BERENDSEN FINANCE IRELAND (EURO) LIMITED (Ireland, Dun Laoghaire)

Figure 3: Account record with Family tree highlighting existing relationships

## MAINTAIN

We live in an ever-changing world and data decays over time. Maintain your company data through scheduled automated refreshes. Choose from daily, monthly or quarterly Account refresh options.

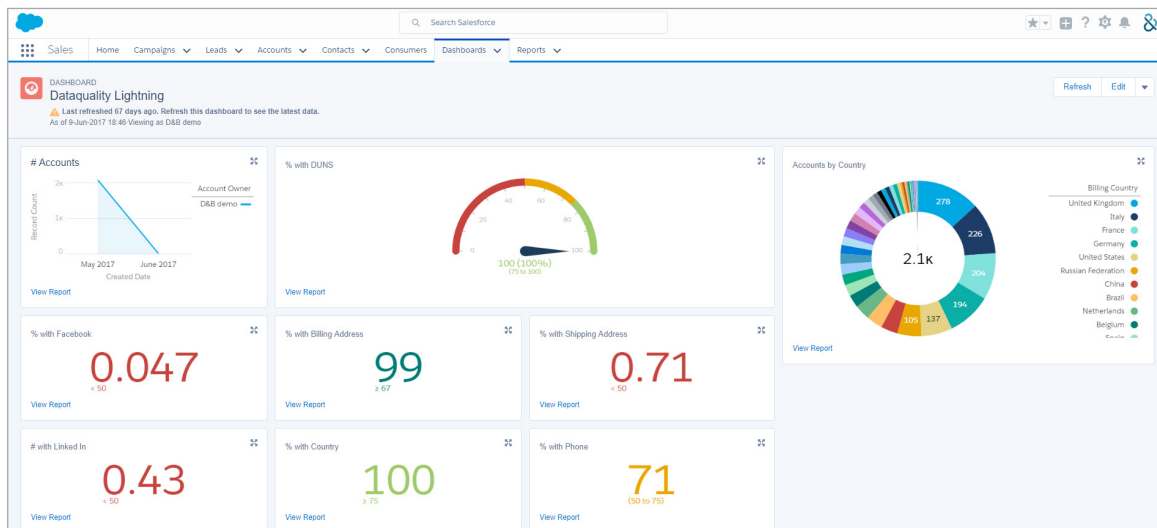


Figure 4: Example data quality dashboard derived from D&B data

## REALISE THE PROMISE OF YOUR CRM

With Dun & Bradstreet's CRM connector, your CRM moves from a business challenge to a trusted enabler, providing a foundation to expand the use, effectiveness and thus importance of CRM to your organisation. You can:

- Minimise data entry, gaps in Account data and errors leading to less time managing data
- Ensure a duplicate free CRM, reducing time spent searching for and resolving Account conflicts
- Offer consistent, structured Account data to accelerate execution of sales, marketing and analytics programmes
- Service Accounts and grow revenue by quickly identifying linked Accounts and related companies to target
- Provide ongoing updates to core Account data to drive adoption and trust

With the knowledge that you have an accurate view of your customers, you can extend the use and value of your CRM tool with additional insight available from Dun & Bradstreet to ensure the promise of CRM is fully delivered. Unique offerings include real-time sales triggers and alerts, decision making location insight, propensity to purchase models and risk and compliance data to ensure cross functional business value is realised.

**dun & bradstreet**

## ABOUT DUN & BRADSTREET

Dun & Bradstreet (NYSE: DNB) grows the most valuable relationships in business. By uncovering truth and meaning from data, we connect customers with the prospects, suppliers, clients and partners that matter most, and have since 1841. Nearly ninety percent of the Fortune 500, and companies of every size around the world, rely on our data, insights and analytics. For more about Dun & Bradstreet, visit [DNB.com](http://DNB.com).

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## DELIVERING THE WORLD'S LEADING SOURCE OF COMMERCIAL ENTITY DATA INTO YOUR CRM

Forming the best view of organisations is what we do day in and day out, on a massive scale. Our ability to turn an enormous stream of data into high quality business information is what sets us apart from our competitors. We maintain data on over 270M companies globally, collected from over 30,000 global data sources, and make 5M updates per day to keep it accurate. Our sources include business registrations, web, over 1B trade experiences, 3M corporate family trees, banking data and social signals.

We take our data through a process we call DUNSRight™, in which we collect, aggregate, edit, and verify data from thousands of sources daily so that our customers can use the information to make profitable decisions for their businesses. The foundation of DUNSRight™ is Quality Assurance which includes over 2,000 separate automated checks, plus many manual ones, to ensure the data meets our high quality standards.

## GETTING STARTED

Contact us to complete a free Data Healthscan to benchmark the quality of the customer data in your CRM. At a glance, you will understand your duplicate records, linked accounts, whether a record is trading, in addition to industry and geographic distribution. From there, CRM Connector will manage your data to ensure your CRM is insight-ready for every interaction.

[dnb.co.uk](http://dnb.co.uk)