Data Doctors Supporting Documentation

Proof of Concept

The proof of concept is built using Tray.io. The interface is built using Typeform.

The customer accesses Typeform page, selects what Record Type they are importing (Leads, Contacts, Contacs + Deals), uploads their CSV, and enters their email. This initiates a series of processes in the Tray workflow.

1. Tray automatically detects any CSV formatting issues and notifies the customer.
2. Tray searches and finds required fields based on record type and notifies of any omissions.
3. Tray scans and detects certain fields and automatically carries out transformation/formatting functions based on Field Rules.

The customer receives a report listing the errors/issues that were found. The customer also receives a transformed CSV. The following points are currently possible:

- Notifies user of missing required/recommended columns
- Cleans headers (newlines, double column, special characters, etc.)
- Removes blanks from first row
- Checks for valid emails updates if not
- Formats date fields
- Formats phone fields
- Produces email with cleaned file, errors and updates performed

The link for the Proof of Concept may be found here:
https://zd843515.typeform.com/to/uZwXq5

Future Work for CSV Checker

Customer Support Tickets

More than 17k tickets are categorized as Importer Issue in the getbase support instance out of a total of 154k. This is roughly 11% of all tickets that Sell has ever received.

This is a small collection of tickets that have been categorized under importer issues.

a. https://getbase.zendesk.com/agent/tickets/188809
b. https://getbase.zendesk.com/agent/tickets/184838
c. https://getbase.zendesk.com/agent/tickets/70129
d. https://getbase.zendesk.com/agent/tickets/169750
e. https://getbase.zendesk.com/agent/tickets/169138
f. https://getbase.zendesk.com/agent/tickets/135737
g. https://getbase.zendesk.com/agent/tickets/14851
h. https://getbase.zendesk.com/agent/tickets/187328
i. https://getbase.zendesk.com/agent/tickets/172431
j. https://getbase.zendesk.com/agent/tickets/103152
k. https://getbase.zendesk.com/agent/tickets/185270
l. https://getbase.zendesk.com/agent/tickets/183067
m. https://getbase.zendesk.com/agent/tickets/173894

The following is a link to the screenshots used in the video.

The image below shows the most viewed articles in the Zendesk Sell Knowledge Base in the past month.
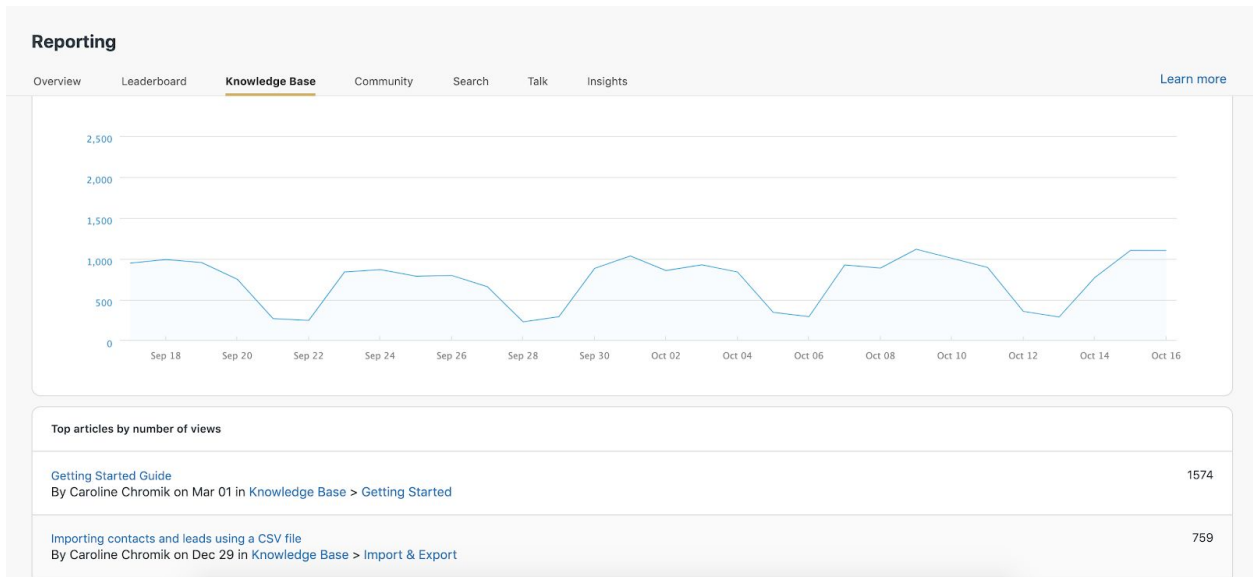
CAM Stories

Our mid-market to large enterprise customers also suffer from the same issues as can be seen in the screenshot below:

T&A Supply - Company Contact Imports (Broden Parent Company & Building List)
To: David Lattimer, Tech Support Queue

Team,

Please see the below from David. There may be an issue with their importer which I will be putting in a support ticket for (and/or it could be that we need to change de-duplication settings). In the meantime, can we please help them with this import? These should all be imported as **contacts**. There will be a parent / child relationship (which also David is not currently able to do with the front-end importer).

David attempted this import for "Parent Company" on 9/16/19 at 11:20 am (you'll see it in his account T&A Admin). When he attempted, about 40 contacts did not go through via the import process.

Please import "Parent Company" sheet first (these are the parent companies, and should be imported as **company contacts**). Please import the "Building List" second, as these need to get attached to the parent companies as child companies. These should also be loaded as **company contacts** as well (under the parent companies in the "Parent Company" file). All company contacts created on both files should be loaded with Broaden Staples as the owner.

As far as the import settings, please:
1) During this import, I want to add new contacts and update existing contacts (*if it is possible to import ALL contacts again, whether or not they may already exist) that would be ideal, and David will de-dupe later*). I am not sure if this will be possible with T&A's current de-duplication settings (if not, @David Lattimer we will need to temporarily turn that off so that duplicate contacts can be imported, please confirm that's ok)

Customer Recordings

These are the full length customer recordings featured in our 2 minute video:

https://drive.google.com/drive/folders/1ccwo5yyv6w1gZ7gWQkrqiGcKw_qkvRpo

Requirements

Field Rules

Field Type	Rules	Error ID	Error Label	Error Description/Instruction
Single Line Text	Char Limit - ?	301		Reached Max Character Limit
Paragraph Text	Char Limit - ?	301		Reached Max Character Limit
Number	No delimiters (i.e., no decimals, commas or currency signs) -- need to round.	303		Contains Delimiters - consider using…
Checkbox	Cannot Import	304		You will not have the option to import
Dropdown	No Rule	305		
Multiselect	No Rule	306		
Date	Format - MM/DD/YYYY or YYYY/MM/DD	307		Change Formatting using Excel Formatting
Email	@ sign	308		Emails must include @ sign
Phone	Phone Format in Excel?	309		
Address	Delimiter limit?	310		
URL	No Rule?	311		

Required Fields

Required Field	Record	Error ID	Error Label	Error Description

Owner	L/P/C/D	201		If blank, will default to user importing data
Last Name	Lead	202		If blank, will default to Company Name, if Company Name blank will not import. Must Have one or the other
Last Name	Person	203		If blank, will not import
Last Name	Deal	204		If blank, will default to Company Name, if both blank will not import
Company Name	Lead	205		If blank, will default to Last Name, if Last Name blank, will not import
Company Name	Company	206		If blank, will not import
Company Name	Deal	207		If blank, will default to Last name, if both blank will not import
Deal Name	Deal	208		If blank, will not import
Deal Value	Deal	209		If blank, will default to 0
Deal Stage	Deal	210		If blank, will default to first stage
Deal Added On	Deal	211		If blank, will default to today's date

CSV Formatting Rules

CSV Rules	Error ID	Error Label	Error Description
No Blank Headers	101		A blank header has been detected. Please name column.
No Blank Second Row	102		A blank second row has been detected. Please enter data into second row. It can be deleted after import.
No Line Breaks	103		A line break has been detected. Please remove line break.
No Hidden Characters	104		A hidden character has been detected. Please remove all hidden characters.
No Hidden Spaces	105		A hidden space has been detected. Please remove hidden space
No Multi-Line Headers	106		Your header does not match the correct format. Please use a single line header.

Data Duplication

Duplicates will be found using the same logic as the current Duplicate Manager. Although not shown in the proof of concept or accompanying UI - this would be a good consideration for future work. In an ideal world, the CSV checker would identify duplicates

Professional Services Guideline for Migration

The Sell professional services team has created documentation to help with data gathering, preparation, cleaning, and importing. As can be seen, in the following article, the process is long, involved, and normally cannot be allocated the resource

1. [Data Migration Guide](#) (Internal Use Only)
2. [Data Importing Template](#)
3. [Data Mapping Sheet](#)

Knowledge Base and Support Articles

The following articles will be used in the instructional design and customer guidance. They were selected based on the amount of views they have and their direct relevance to the project. It is the recommendation of the team to include this in the flow of the Data Doctor in-product UI to "force the education" of the customer.

1. [Leads, Contacts, and Deals](#)
2. [Importing Contacts and Leads](#)
3. [Managing Duplication Settings](#)

Instructional Design Content

[Logo] Data Doctors

Welcome to our in-house Doctor, Admin! We are here to help you get your data into Sell. Use our Data Doctor to run a diagnostics check on your import file.

To make your team feel at home in Zendesk Sell, we will need to make sure that all your current data is in Sell before they login. Your Sales Team will not operate at maximum efficiency if your data is messy, out of date, or missing! Let's get your data in a healthy spot so your team can start selling like machines.

To get your data into Sell, you'll need to import a [CSV](#) or two. These CSV files will hold all the data that you want to get into Sell. We have a helpful video to run you through the process:
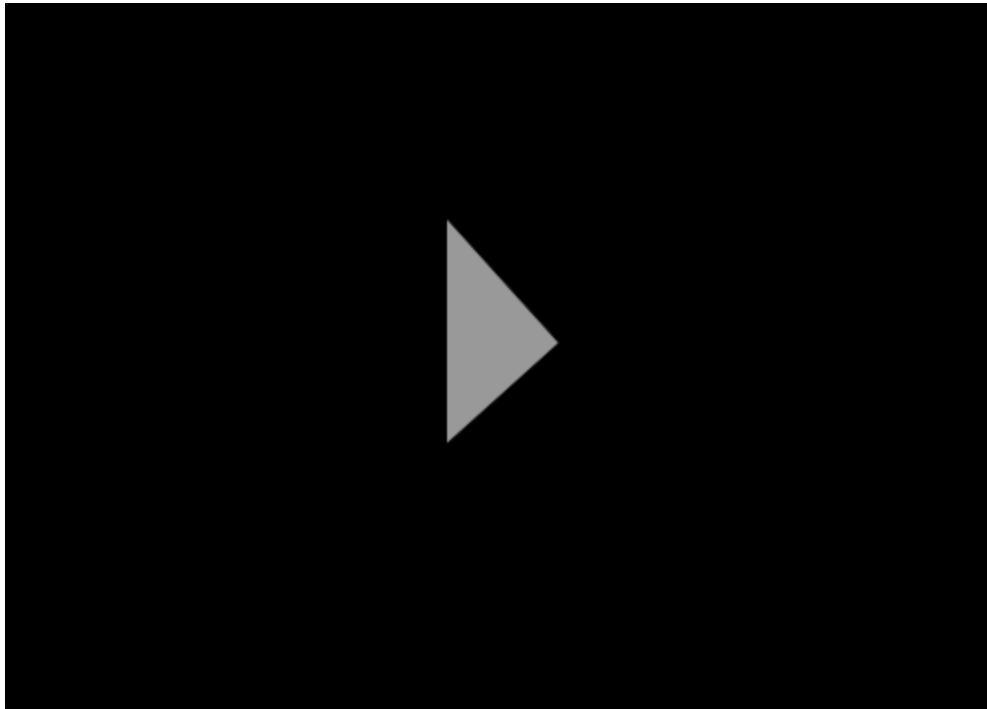
You can also go to our [Knowledge Base article](#) about preparing your data and using our Importer

Remind yourself about [Leads, Contacts and Deals](#) before you start gathering your data. Think about the Standard and Custom Fields you will use. Here's a refresher on what [Field Types](#) you can choose from to create your Custom Fields.

Helpful Materials for Admins and Sell Configuration:

1. Data Import Mapping Guide and Template -
2. Data Mapping Sheet -
3. Configuration Sheet -

Slide 5
Data Doctors + LOGO

Data Doctors has detected the following errors in your CSV sheet. Use our Diagnostics Dictionary below to get your data healthy!

Diagnostics Dictionary

CSV Formatting

Error 101: A blank header has been detected. Please name column. (Please add ? icons)
Error 102:A blank second row has been detected. Please enter data into second row. It can be deleted after import.
Error 103:A line break has been detected. Please remove line break.
Error 104: A hidden character has been detected. Please remove all hidden characters.
Error 105: A hidden space has been detected. Please remove hidden space
Error 106: Your header does not match the correct format. Please use a single line header.

Record Requirements

Error 201: Owner Blank - will default to user importing data
Error 202: Last Name Blank (L) - will default to Company Name, if Company Name blank will not import. Must Have one or the other
Error 203: Last Name Blank (P) - will not import
Error 204: Last Name Blank (D) - will default to Company Name, if both blank will not import
Error 205: Company Name Blank (L) - will default to Last Name, if Last Name blank, will not import
Error 206: Company Name Blank (C) - will not import
Error 207: Company Blank (D) - will default to Last name, if both blank will not import
Error 208: Deal Name Blank - will not import
Error 209: Deal Value Blank - will default to 0
Error 210: Deal Stage Blank - will default to first stage
Error 211: Deal Added On Blank - will default to today's date

Field Formatting

Error 301: Reached Max Character Limit
Error 302: Delimiters detected in Number Field. Please remove all non-numeric characters, including currency symbols, delimiters, and decimals.
Error 307: Date format detected: Change Date Format to MM/DD/YYYY
Error 308: Email format detected: Please use @ sign.
Error 309: Phone format detected: Please change to phone formatting.

Duplication

Error 401: Duplicate detected

Metrics of Success

It is recommended that the following metrics are tracked and analyzed after a release of the in-product version

- Reduction in Customer Support Tickets categorized as Importer Issues over given time period
- Reduced sales call time
- Increased conversion rate
- Increased retention rate
- Increased customer count
- Increased trust, loyalty, and repeat business

Future Considerations