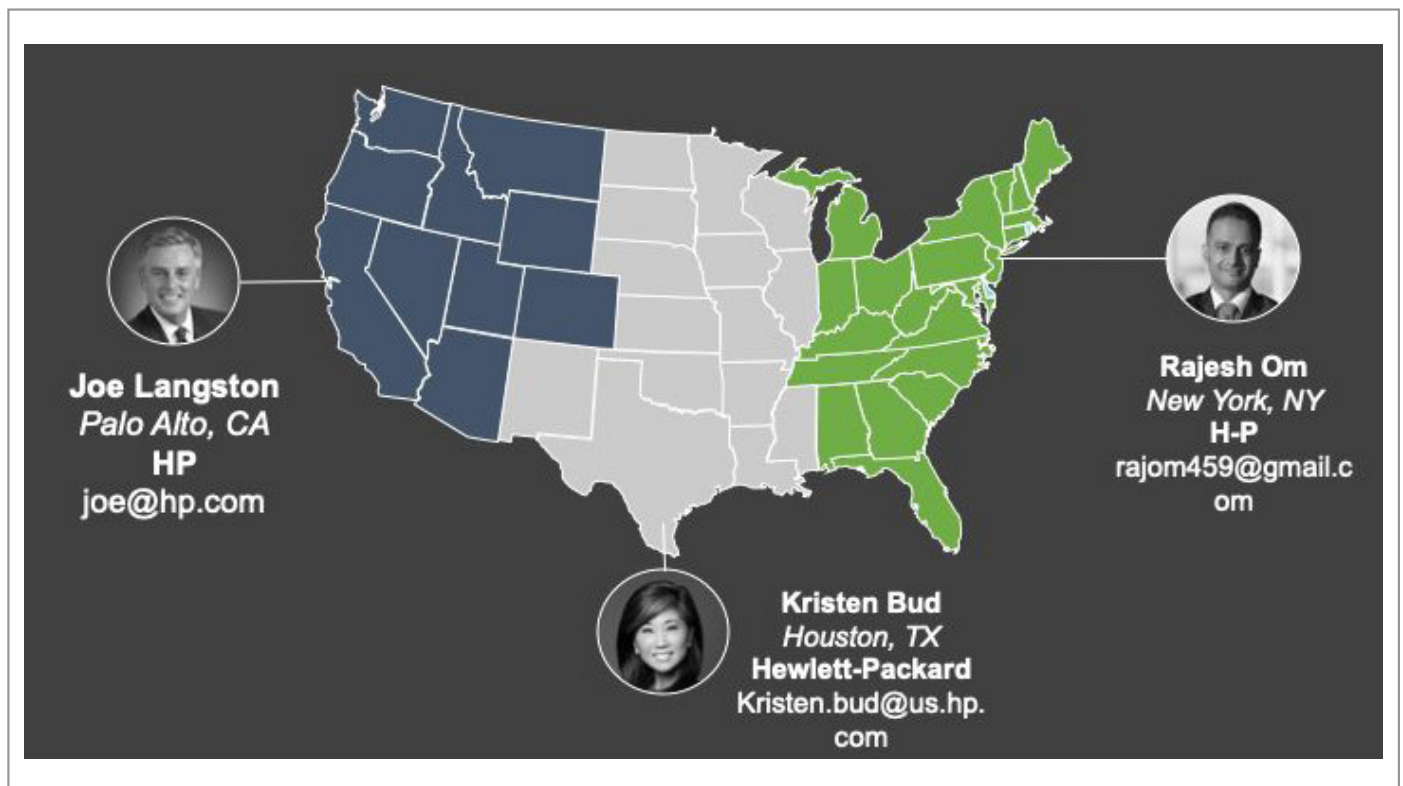


## Establishing Data Quality in your CRM with LeanData

Salesforce research shows that 20% of the average company's database records are completely useless due to several factors, such as old data or duplicates. Dealing with poor data quality takes over 21% of a rep's time. This results in lower productivity and poor conversions. Salesforce offers some rule-based condition sets that need to be continuously updated and cannot be scaled easily. They also lack any contextual data or smart logic, the ability to handle parent child accounts or small email domain variations within a company. In addition, this problem is compounded daily by users manually adding duplicate accounts, leads and contacts into Salesforce. This causes duplicates and junk leads to continuously slip through the cracks.



It begins with poor lead-to-account matching. Imagine a new lead, Joe Langston, who fills out his company name as “HP” and email as “Joe@hp.com”.

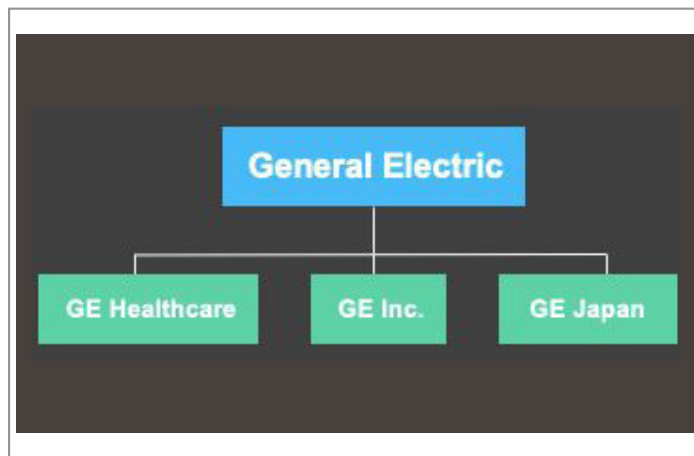
- If the HP account in Salesforce is set up as H.P. or Hewlett Packard, sub-standard matching solutions will not recognize this as a match.
- If the lead for Joe already exists with a “us.hp.com” email, the duplicate will not be recognized.
- If you auto-create new accounts for non-matches, Rajesh (who provided his gmail.com email) is created as a duplicate to the Google account.

# Handling Duplicates & Junk Leads with LeanData Matching & Routing

## Matching

LeanData's best-in-class matching solution leverages several best practices to identify matches at an unprecedented rate. As a result, you can identify and merge or exclude more duplicates and junk leads and contacts than ever before.

- Fuzzy matching involves fields more than just email and website domain
- Matching algorithm leverages historical data to look at variations of data to accomplish a successful match rate of 99.997%
- Duplicates and junk leads that normally slip through because of small spelling variations are caught and either merged or excluded.



## Use Cases

- Complex parent child accounts easily managed with easy rule stacking
- Junk leads can be automatically disqualified if missing critical data points
- Duplicates easily excluded or merged based on settings inputted by user.

**LeanData** Duplicate Accounts | [See All \(Accounts:3\)](#)

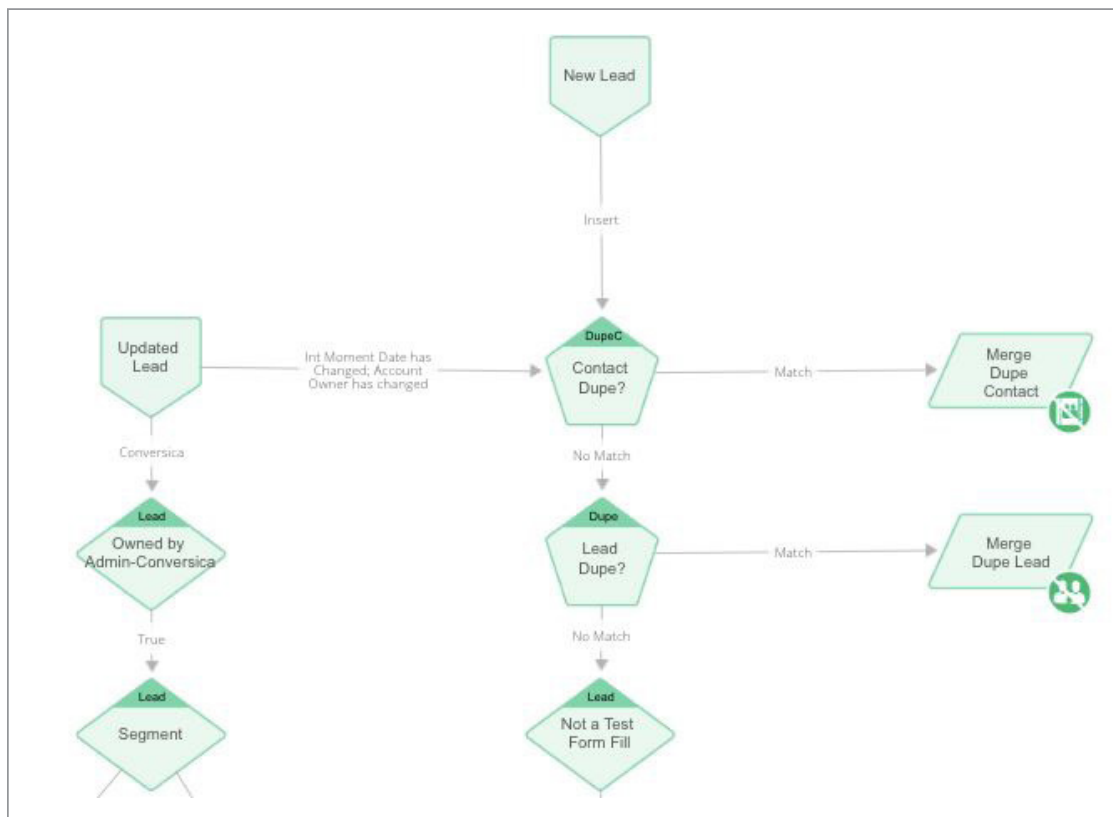
[Account Settings](#)

	Account Name	Owner	Created Date	Number of Opportunities	Billing State/Province	Billing Country	Industry
Merge	A Big Company, Inc	Vivek Ravisankar	10/12/2016	0	CA		Recreation
Merge	A-B-C	Vivek Ravisankar	09/12/2014	0	CA		Recreation
Merge	ABC	Vivek Ravisankar	11/12/2017	0	CA		Recreation

**LeanData** Matched Leads | [See All \(Leads: 3\)](#) | [Mass Convert](#) | [See Lead Activity](#)

[Lead Settings](#)

	Full Name	Title	Email	Company	Owner	Created Date	Status
<a href="#">Convert</a>	Joan Langston	CMO	joan@abc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted <input type="button" value="v"/>
<a href="#">Convert</a>	Susie Ford	CEO	susie@gmail.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted <input type="button" value="v"/>
<a href="#">Convert</a>	David Bud	VP of Sales	david@bigcompanyinc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted <input type="button" value="v"/>



## Routing

LeanData Routing Flowbuilder makes lead deduplication and junk lead control in its visual interface a breeze. Automatically match and merge incoming leads with existing leads or contacts. Also, deprioritize any junk leads that do not meet quality standards, so that reps do not waste time on them.

- Set up holding queues for junk leads while data enrichment services fill in missing data
- Disqualify junk leads based on rules to exclude them from being assigned to a rep
- Automatically merge duplicate leads and contacts to keep your database clean

## Why LeanData?

Built upon the best-in-class matching technology, LeanData Engagement is the most simple, accurate, and actionable engagement analytics tool in the market.

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's family of solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. Visit [leandata.com](http://leandata.com) to learn more about LeanData's revenue operations solutions for Lead-to-Account Matching, Routing, Engagement and Marketing Attribution. Or visit us on AppExchange.