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Checklist

Improve the customer experience with better data

Your ideal customer profile (ICP) should inform everything from your lead scoring model to your company's go-to-market strategy. Experts say ICP analysis should take place every 6-18 months, particularly when market conditions change or performance is less than ideal.

If re-assessing how you define and analyze your customer profile that often makes you cringe, you may have a data problem! By doing prep work up front and ensuring the data is in stable state, you can shave hours off an ICP evaluation. The following questions will help you determine which data points to focus on first.

Have we been analyzing the right data?

- Is our current definition based on internal opinions or existing closed won opportunity data?
- Have we incorporated churn data into our ICP analysis to uncover which profiles we should avoid?
- Have we checked to make sure the assumptions in our ICP definition are true? For example, have we checked whether our preferred titles convert at a higher rate than null or blank values?
- Which data have we avoided and why?

How standardized is our data?

- Am I looking for keywords (and common misspelled variations) in titles or do I have a standard set of "normal" titles to make analysis easier?
- How many data sources do we use for values like industry, vertical, or sub-industry? Is there a way to create a condensed short list of values?
- How are we calculating company size? Is this in line with how our current enrichment source(s) populate the data?
- Do we rely on technology data? How about intent data? How easy are these values to organize?

What does our go-to-market team want to use the data for?

- Segmentation
- Lead scoring and qualification
- Lead routing
- Target account identification
- Web personalization
- Sales prospecting
- Territory definitions
- Identifying at-risk accounts
- Other?

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How to decide what happens first

It's important to understand where your teams are struggling to get the information they need to do their jobs seamlessly. If you don't have a list, the following can help you prioritize what comes first.

1 What impacts your customer's experience?

Sometimes, we miss how data inconsistencies impact the customer because operations are two steps removed from direct interactions. It's important to speak with frontline employees and determine whether missing or incorrect information is impacting the time to follow up on leads, who owns the account, or how information is presented to customer success while trying to support a customer with an issue.

2 What impacts your end user?

The second level of priority should be streamlining the end user experience. This could include helping account executives or inside sales segment their accounts for cold prospecting or ensuring that account ownership transfers don't cause confusion.

3 What would improve automated processes?

If your automated flows have excessive logic loops or tons of variables to process the information in a single field, it's time to figure out how to streamline your data management. We encourage you to explore third-party solutions and utilize a data warehouse to process data, which can then be pushed back to your CRM to minimize processing load.

4 What's preventing you from meeting executive reporting demands?

Have you been denying requests for things like pipeline velocity analysis, territory refinement, or other funnel analyses because of gaps in your data? This is the perfect time to add those components to your data management and processing list.

5 What makes more frequent analysis difficult?

While we'd like to say that eliminating wasted time wrangling spreadsheets is the top priority, we recommend fixing what impacts customers and end users first. However, once you've streamlined those workflows, it's time to determine what needs to be done to improve your experience. Analyze your use of spreadsheets for normalizing, merging, or prioritizing accounts and people, and then seek ways to transition those tasks to a tool designed for data management.

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What to watch for

Order of Operations

Making a change in one system can break downstream processes. Checking for dependencies downstream can prevent a lot of heartache.

What deduplication or matching rules exist?

Setting up out-of-the-box deduplication or matching rules in your CRM can have unintended consequences, like blocking campaign member creation and causing lead routing failures. Check your current logic and do a lot of testing off-hours before turning on that data.

Which fields are used for territory routing?

Geographic, firmographic, and technologies-used fields are common targets for lead routing logic. Talk to your territory manager to understand which values and formats are necessary to properly route records—and whether there is a standard process already running in a different system to normalize data.

Have you cleared your plan with other system admins?

Do you have rules in your CRM and marketing automation that do the same thing? Do you have clear "tie-breaker" rules for which field is updated when? Do you have a way to allow your end users to override values without enrichment or other system values resetting them?

Do you have data processing rules that account for user input?

End users are never thrilled to perform data entry. End users who save updated phone or title information only to watch it revert to the original value can incite strong feelings. Enrichment vendors are often a few steps behind your frontline reps, so it's important to know when to honor their input.

How flexible are your reports?

Normalizing data can reduce processing for things like lead routing. Now that you've checked whether or not automated system processes are dependent on specific formats, it's time to make sure your reports and filters won't break once you make your updates.

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Example field update checklist

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This list is by no means exhaustive, but it's a start!

Field	Management tasks	Management system	Impacts existing automation?
State	Standardize into either abbreviation or long form | Infer state from Postal Code | Infer state from Phone		
Postal Code	Normalize values and remove special or excess characters | Identify & delete invalid values		
Country	Standardize to code or long form | Infer country from State | Infer country from IP address		
Phone	Normalize format | Identify and remove common fake numbers (123) 456-7890		
Industry	Analyze values and calculate normalized value in Industry Short field | Infer from NAICS or SIC codes		
Title	Analyze values and calculate normalized value in Title Short field		
Job Level	Analyze title and infer normalized job level		
Department	Analyze title and infer department		
Annual Revenue	Normalize to standard ranges or number format		
Number of Employees	Normalize to standard ranges or number format		

Contact Openprise:
info@Openprisetech.com
(888) 810-7774
www.openprisetech.com

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