



EQUIFAX[®]



Case Study

Optimizing a CRM to empower the sales force and drive revenue

One of the country's largest site services providers gains visibility into all records in its CRM platform for improved prospecting.

The brief

When one of the country's largest site services providers implemented Salesforce.com, it wanted to fully optimize the new CRM platform. Doing so would arm its sales force with the best information to identify and nurture prospects, ultimately closing more deals. With **B2bConnect™ Linkage** and **B2bConnect's™ Lightning Data** solution, the company enhanced its business contact database to shorten the sales cycle, get the right leads to the right people, and increase close rates.

Kicking off on solid footing

After investing in Salesforce.com, our client immediately looked to ensure the integrity of the data loaded into the platform. The CRM would only be as effective as its data, and company leaders wanted to make sure the data were high quality. Requirements included the following:

- Eliminating duplication of records to avoid confusion among sales reps and time wasted on wild goose chases
- Identifying legal linkages among all current customers—including parent and child organizations
- Integrating all this information into Salesforce.com for seamless and powerful prospecting

The initiative began in late 2018 to clean up customer files by eliminating duplicate records and ensuring firmographic and parent information was accurate. New business account information entered into the CRM also enabled matching to our database via B2bConnect's™ Lightning Data solution, automatically adding up to 95 additional data points to each matched record.

Knowing our breadth and depth of services, as well as our knowledge of its industry, our client then looked to us to identify linkages throughout the CRM to further bolster its sales process.

Driving informed prospecting

Our B2bConnect™ database contains more than 43 million records in the U.S.; 3.8 million of those are associated with a corporate family. Each record has a unique EFX ID®, an identifier assigned to every business location. With B2bConnect™ Linkage, corporate family trees are linked by EFX IDs®, so our client's existing customer records were automatically matched with the approximately 600,000 records they purchased. Our client gained total visibility into any business account's related organizations—from legal, global holding companies to site location businesses and affiliates.

For example, the company now could see that a particular customer had 50 locations they were not working with and send salespeople to call on them—offering an immediate warm lead. B2bConnect™ Linkage gives the business the ability to



Clearly understand where relationships exist among existing customers



Drive informed prospecting throughout its sales force



Ensure its salespeople have solid pipelines of qualified leads

All this served to meet its goals of optimizing Salesforce.com to tighten the sales cycle, effectively and seamlessly manage leads, and optimize prospecting.

Product spotlight

With **B2bConnect™ Linkage**, corporate family trees are linked by unique EFX IDs®, uncovering relations among all records, unlocking greater customer and prospect visibility and a greatly enhanced, targeted approach.

With **B2bConnect™ Lightning Data**, new account records are seamlessly enriched in real time with up to 95 data points to help salespeople refine their message and make more informed calls.

Supercharging the top line

Through our partnership, our client is poised for greater sales success. We won the business because we know our client's business inside and out and have a proven track record of delivering measurable results. We do not dump data and then move on. Instead, we undertake an iterative consulting process to refine the deliverable. By working together, our client knew it would get the most possible value from Salesforce.com, thus driving the top line.