Client Name Withheld Contact Washing Machine

December 2017

Client Name Withheld Request

Contact Washing Machines: (ongoing)
- State
- Country
- Industry
- TimeZones

Removals (systematically)
- Test Records
- Internal (Client Name Withheld)
- Bad Data (asdfg@hjklmln.com, Mickey Mouse, Donald Duck)
- Blacklists

Data Standardization:
- Job Title (broken out to seniority & function)
- Proper case first/last name

Deduplication
- Leads to Leads
- Leads to Contacts
- Leads to Accounts
- Contacts to Contacts
- Accounts to Accounts Remove blacklists

Contact Washing Machine

State & Country

Fields:

- State
- Country

Input

- State
  - Long Form (California)
  - Recommend that you create in SFDC when entering address that validation for State to be long form (drop down vs. free text)
- Country
  - Long Form (United States)
  - Recommend that you create in SFDC when entering address, validation for Country to be long form (drop down vs. free text - highly recommend you have United States and Canada be top of the list)
  - Be sure to apply on Account fields (Billing Country, Mailing Country) as well.

Logic

- Batch process when not in proper (backfill)

Industry

Fields:

- Industry
- Industry (secondary)
- Industry (terciatry)

Input:

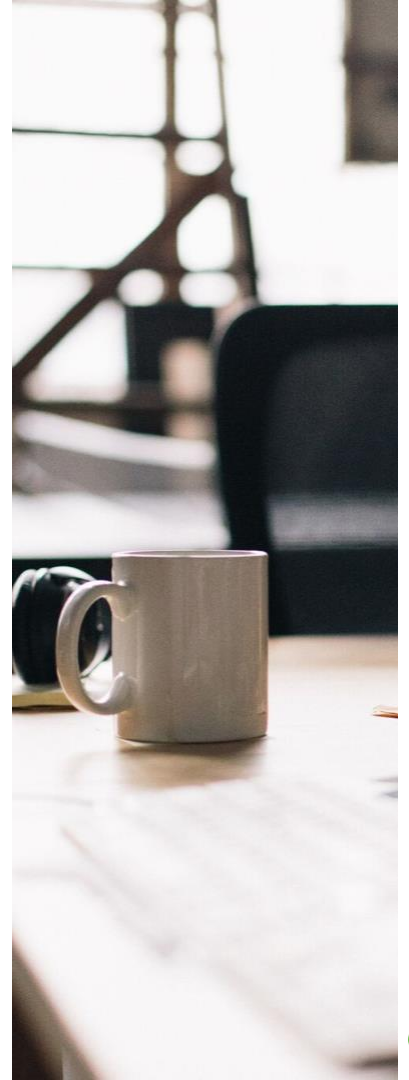- Current Pick List: [Here](#)

Standardization:

- Match to existing pick list
- Potential future - match based on SIC codes (as they are collected)

Logic:

- Trigger - When Industry is changed
- Batch - When Industry is not on current pick list

Fields:
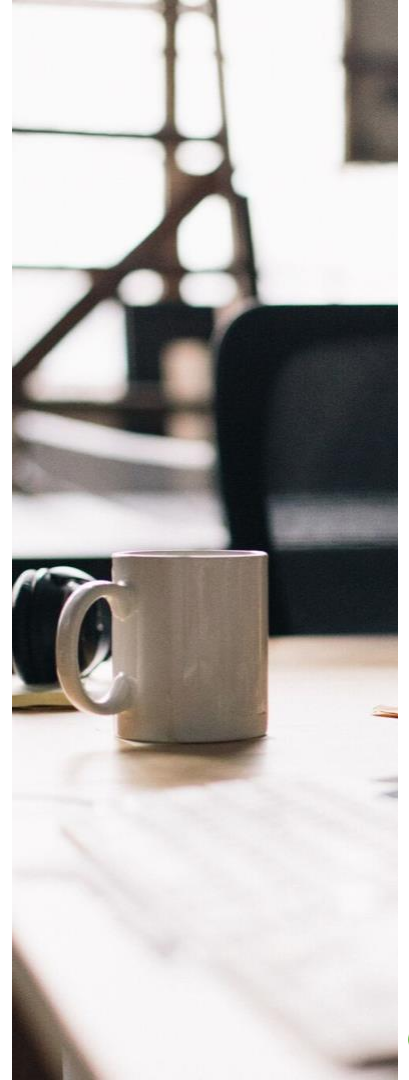
- Create Time Zone field (lead/contact)

Input:

- List based on State
- TimeZone Code (EST)
- https://docs.google.com/a/A Pink
  Buffalo.com/spreadsheets/d/1xqw8Fqz3WPLZxnbJIWDKbxvvwYtm-
  druTFPfBvKYFPo/edit?usp=sharing

Logic

- When state is changed TimeZone is updated

Removals

Removals

Test Records:

- Logic - contains TEST in First/Last/email (segment- test)
- Suppress from sending alerts/notifications
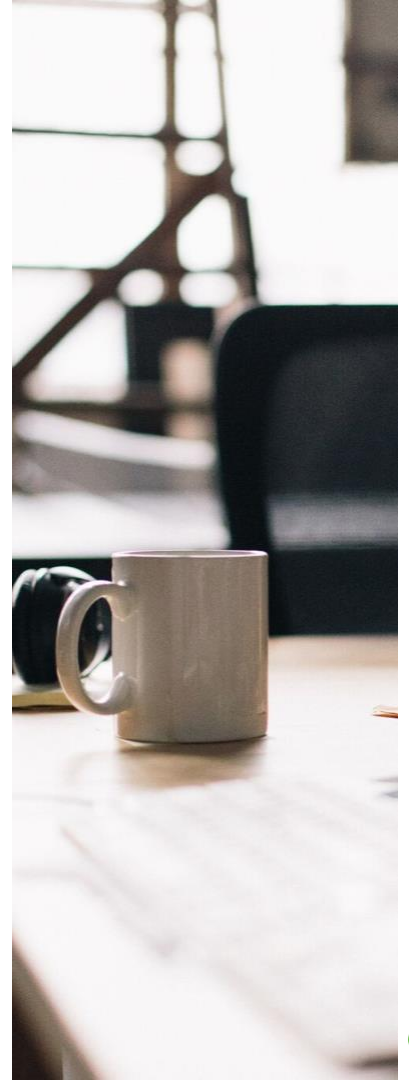- Smart List (that needs to be reviewed manually)

Internal Records

- Logic - email/company contains Client Name Withheld (currently employee in segment)
- Batch, scheduled monthly

Bad Data

- Logic - first/last/company name and email contains (see examples)
- Update Segment to include "bad data" for suppression to pass to SFDC
- Batch, scheduled monthly

Blacklist

- Segment = Blacklist
- Suppress from being passed to sales
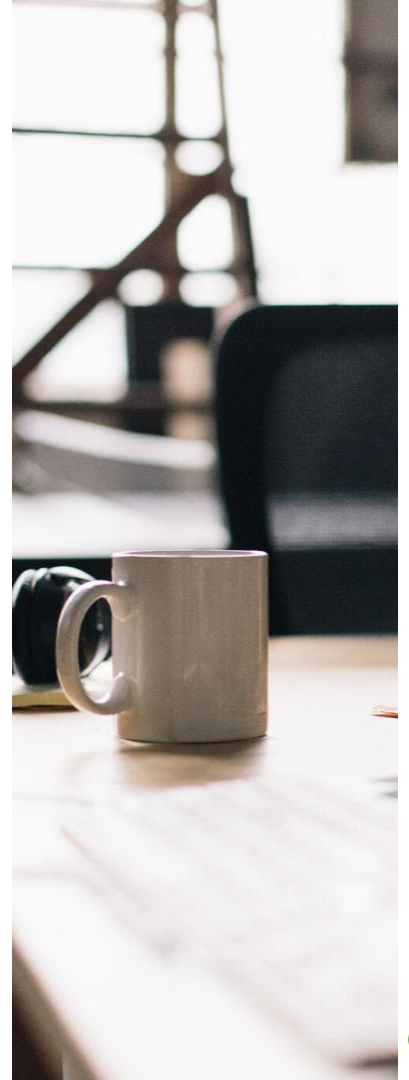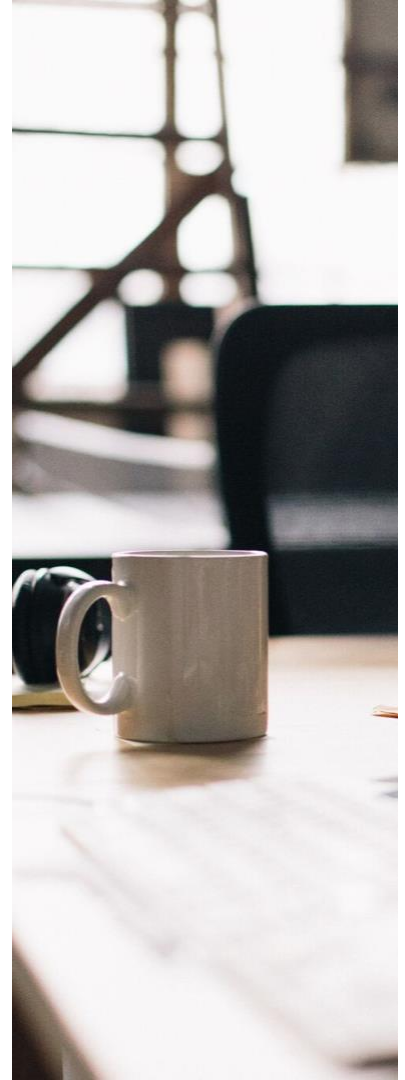- Batch scheduled monthly

Data Standardization

Proper Case

- At this time this is not able to be built as a trigger in Marketo
- One time database Cleanse (that can be repeated on a quarterly basis
- Process
  - Export database
    - First name
    - Last Name
    - Company
    - Job Title
    - Email Address
  - Open in excel
    - Run Proper case on each field (except email address)
  - Upload to flat list in Marketo
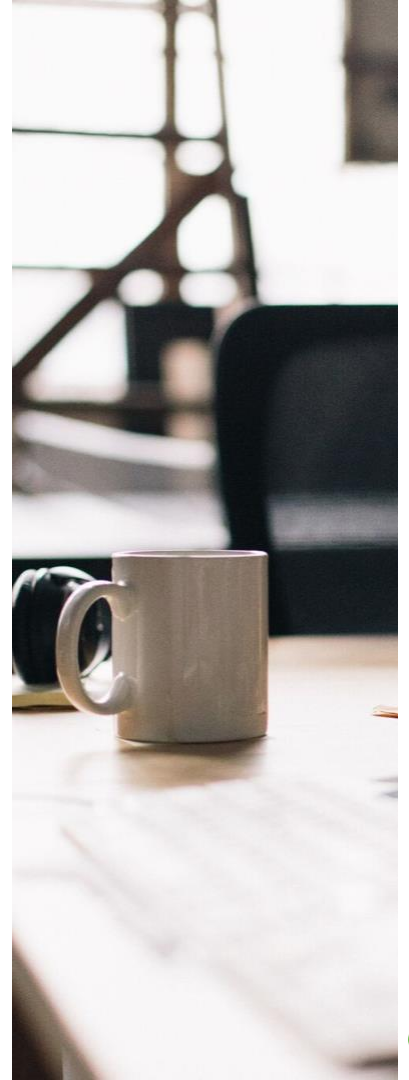
Job Title = Level & Function

- This is a complicated process with many variables
- This will need to be an evolving and is dependent upon the quality of data and format of how it's populated (list uploads, etc)
- Due to the complexity and size of this project - recommend that it be a separate project vs. part of contact washing machine.
- Process:
  - Finalize Levels
    - Manager
    - Director
    - VIce President
  - Develop Level break down translation
    - Dir, Director, but not Direct = Director
    - VP, Vice, = Vice President
  - Finalize Function
    - Human Resources
    - Operations
    - Finance
  - Develop Level break down translations
    - Fin, Finance, Accounting, = Finance
    - HR, Human, = Human Resources

DeDuplication

DeDuplication

- Due to Marketo's restrictions on writing to Accounts as well as inability to merge Lead/Contact - this process should be accomplished in SFDC
- Data to be evaluated and recommendations:
  - Lead to Lead (this can be done on a 1 at a time basis in Marketo)
  - Lead to Contact (this must be done in SFDC)
  - Lead to Account (this required complicated fuzzy matching and should be done in SFDC)
  - Contact to Contact (this can be done at a 1 at a time basis in Marketo)
- Recommend tools such as DemandTools, RingLead, etc to set up an ongoing Client Name Withheld Specific Process.

Appendix

Industry

- Agriculture
- Business Services
- Chambers of Commerce
- Cities, Towns & Municipalities
- Construction
- Consumer Services
- Cultural
- Education
- Energy, Utilities & Waste Treatment
- Finance
- Government
- Healthcare

- Hospitality
- Insurance
- Law Firms & Legal Services
- Manufacturing
- Media & Internet
- Metals & Mining
- Organizations
- Real Estate
- Retail
- Software
- Telecommunications
- Transportation

Bad Data Samples

Mickey Mouse
Donald Duck
asdfg@asdg
Donald Trump

Job Title to Job Level Translation

Job Title Contains	Job Title Does Not Contain	Job Level Translation
Example: Director, Dir.	Direct	Director

Job Title to Job Function Translation

Job Title Contains	Job Title Does Not Contain	Job Function Translation
Example: Finance, Fin., Accounting	"Account"	Finance