



## Access the Power of CRM Data Accuracy

Sales and marketing organizations rely on clean and accurate data to qualify leads, hone in on the right opportunities, and maintain a scalable pipeline of ideal targets. Data comes into CRMs from so many sources, it's hard to get data clean and keep it that way. Yet the alternative is unsustainable. The manual work of sorting through time-wasting duplicate and unusable information can hamstring sales and marketing teams—preventing focus on revenue-generating activities.

It's essential to create a lean and relevant set of CRM records, and the protocols to keep them that way. That's why we created the Aurea CRM Data Management Propack.

### Introducing the CRM Data Management Propack

The Aurea CRM Data Management Propack provides the services organizations most need to evaluate their data so they can clean it up, monitor data entry channels to make sure data stays fresh, and develop a culture of data hygiene so that records are accurately maintained going forward.

#### THIS PROPACK ENABLES YOU TO:

**De-dupe & refresh:** Comprehensively analyze CRM records, so you can take inventory of duplicates that are dirtying your database, and clean them up.

**Monitor & improve:** Evaluate your three major CRM elements (e.g. opportunities, accounts and contacts) to help you analyze and ensure accurate records.

**Create a culture of data cleanliness:** Assess and implement validation rules to keep incoming data clean, so you can see the difference clean data makes to your sales operation over time.

### Services to meet your CRM data demands

Every Aurea Propack is designed to eliminate risk, improve quality, and remove financial uncertainty. We've bundled all the expertise and services you need in one affordable, no-surprises annual subscription package so you can focus on your critical business needs.

The CRM Data Management Propack includes three primary services bundles. Each service is available as part of a 1-year Propack subscription.

**SERVICE:****INCLUDES:****Data De-Duplication Analysis**

Annual analysis of your marketing database

- One data de-duplication analysis annually (up to 500,000 records)
- Flexible delivery: we can remote into the system and work in your environment, or use FTPS to retrieve/return data in compliance with GDPR
- Data duplication report

**Data Management Reporting**

Up to three reports on your choice of CRM elements (e.g. opportunities, accounts and contacts)

- Kick-off meeting to define specific company parameters, and set up configuration requirements for each report
- Quarterly delivery of selected reports so you can monitor progress

**Data Usability Best Practices**

Analysis of up to 10 catalog values, list options, field validations, and syntax to ensure data relevance

- One-time analysis of CRM catalog fields and list options, including a ranking of fields with lowest adoption rates
- Recommendations on, and implementation of, updated catalog list options
- Implementation of field and syntax validation (e.g. phone number validation)

## Aurea Propacks for speed, simplicity, and quality

**Accountability**

Aurea is accountable for delivering results. Our cross-functional team of subject matter experts and engineers guarantee project success.

**Value**

Propacks provide a fixed-price alternative, and utilize highly scalable experts and engineers to deliver more value-per-dollar than traditional on-site services approaches.

**Simplicity**

Propacks benefit from accelerated project initiation, and simplified administration and reporting during delivery.

**Expertise**

A dedicated Delivery Manager orchestrates delivery, engages the right SMEs, and ensures business continuity.

**Interested in learning how Aurea Propacks can help you advance and enhance your business?**

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