

Data Quality – how to keep your data in good shape



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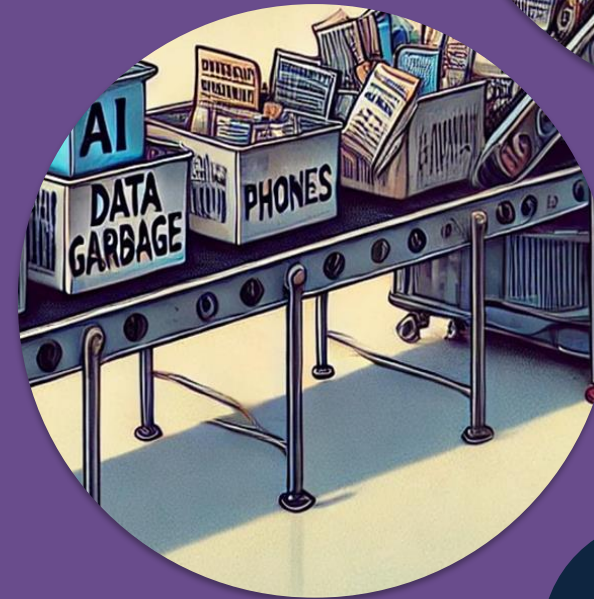
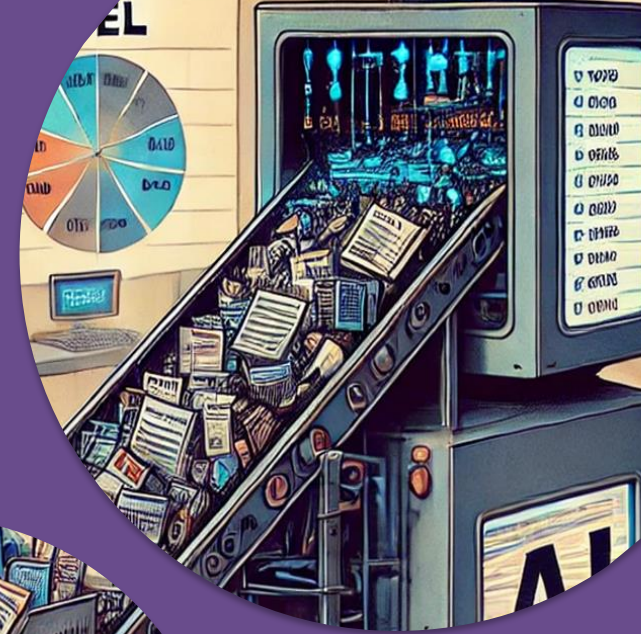
Ben Gilbey
Technical Sales Support
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CUSTOMER SUMMIT 2024

Workbooks

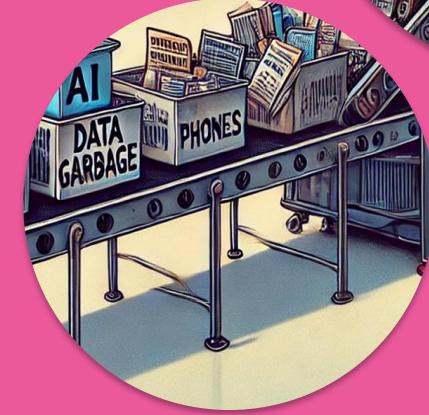
The Why, What, and How of Data Quality Improvement

Mastering CRM Excellence: Key Strategies for Improving Data Quality in Workbooks



Agenda:

- Understand the importance of data quality for CRM success
- Learn key aspects and strategies for improving data quality
- Participate in a Data Value Mapping workshop
- Case study demonstrating successful data quality improvement
- Explore methods for record matching, mastering and merging
- Review key takeaways and a Q&A session





DQ Global helps organisations to achieve more with their CRM data.

We work alongside Workbooks to improve the quality of their client's data, which in turn increases productivity, adoption, and quality of analytics.



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Start With Why: The Importance of Data Quality



Purpose



Growth



Trust



Compliance

Why Better CRM Data Matters

56%

of firms mention
questionable data quality
as a major challenge

Vention - 2024

47%

of newly created data
records have at least
one critical error

Harvard Business Review

84%

of CEOs say that they are
concerned about the
integrity of the data they
are making decisions on

Forbes

What Is Data Quality Improvement?



Definition: The process of ensuring that data is accurate, complete, reliable, relevant, and unique.

What Are The Key Aspects of Data Quality

01

Accuracy:
Correctness of
data.

02

Completeness:
No missing
information.

03

Consistency:
Uniformity
across
different data
sources.

04

Timeliness:
Up-to-date
information.

05

Relevance:
Data is
applicable and
useful.

06

Uniqueness:
Ensuring no
duplicate
records exist.

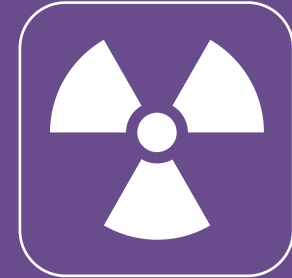
What Are The Consequences of Poor CRM Data Quality



Increased Costs



Lost Revenue

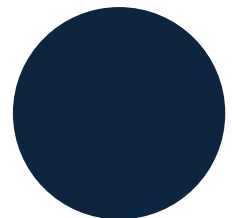
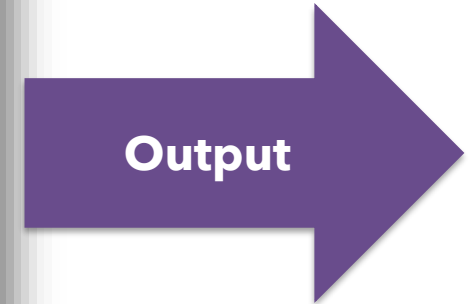
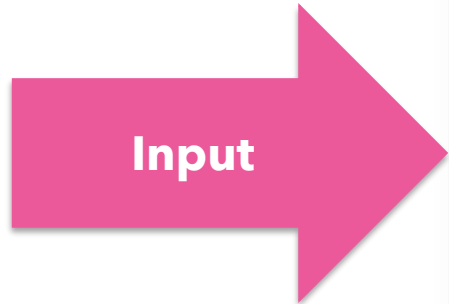


Compliance Risks

Data Value Mapping

**A process for delivering
business value by
understanding the
Information Supply Chain...**

Data Value Map - Overview



Group Exercise

All

Discuss
business values

01

Where is your
data coming
from?

02

What
integrations are
required?

03

What analysis
and reports are
needed?

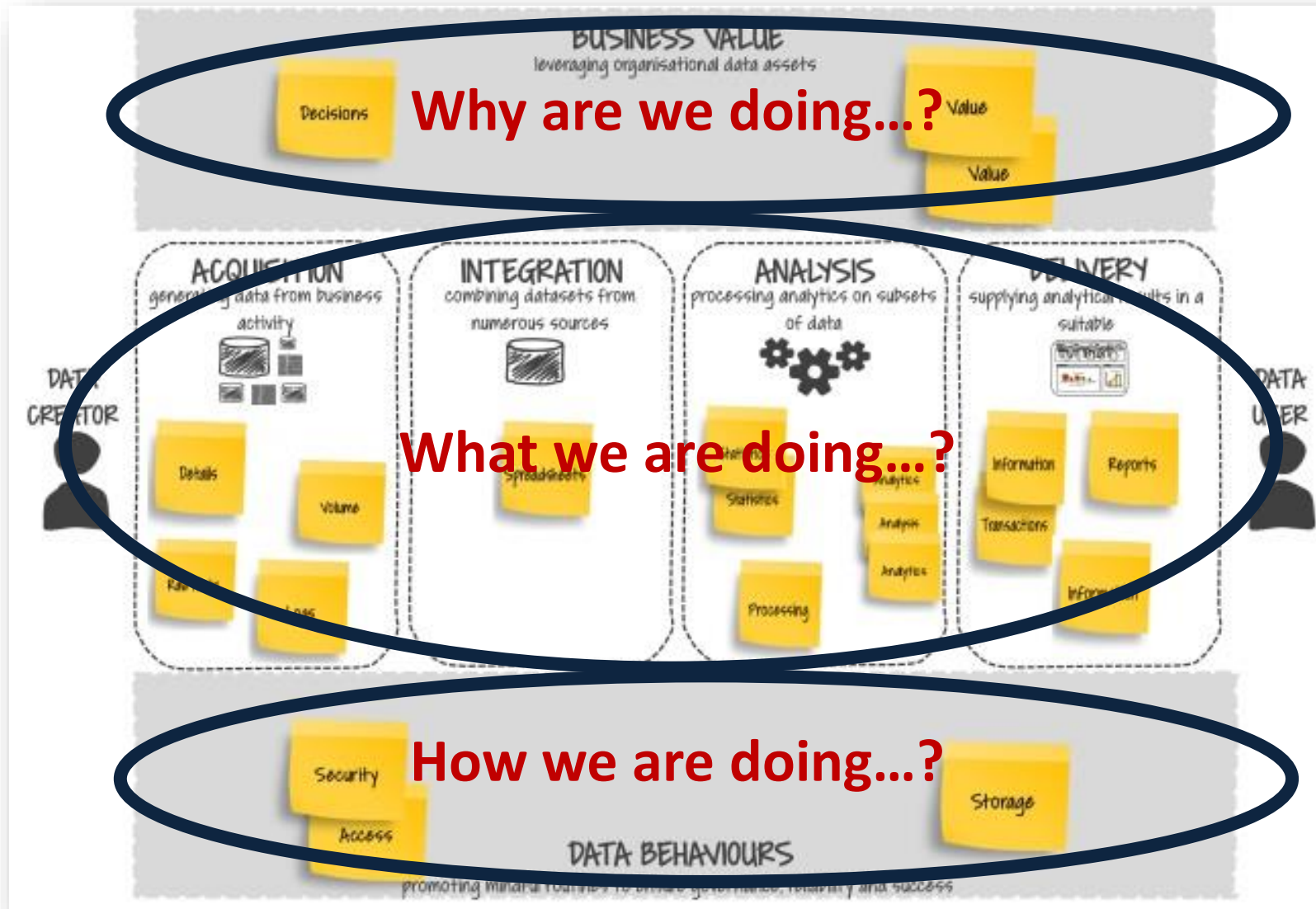
04

How must the
data be
delivered to
the users?

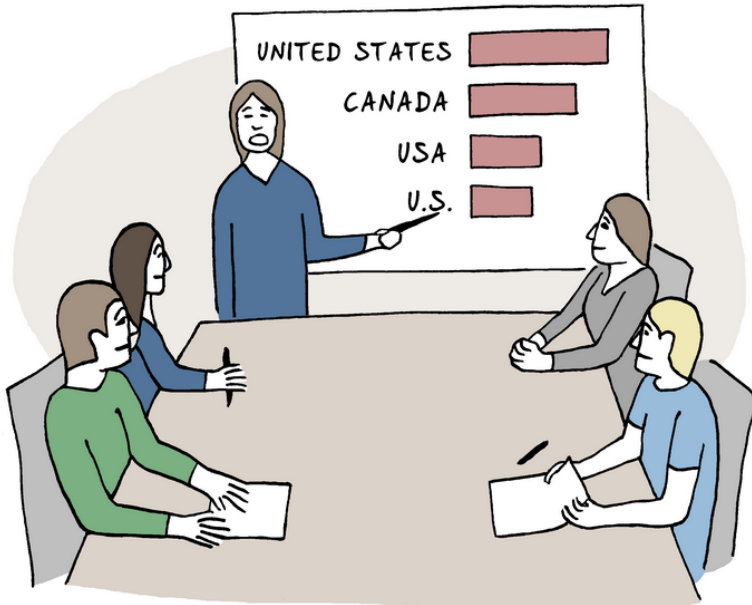
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What
organisational
behaviours will
need to
change?

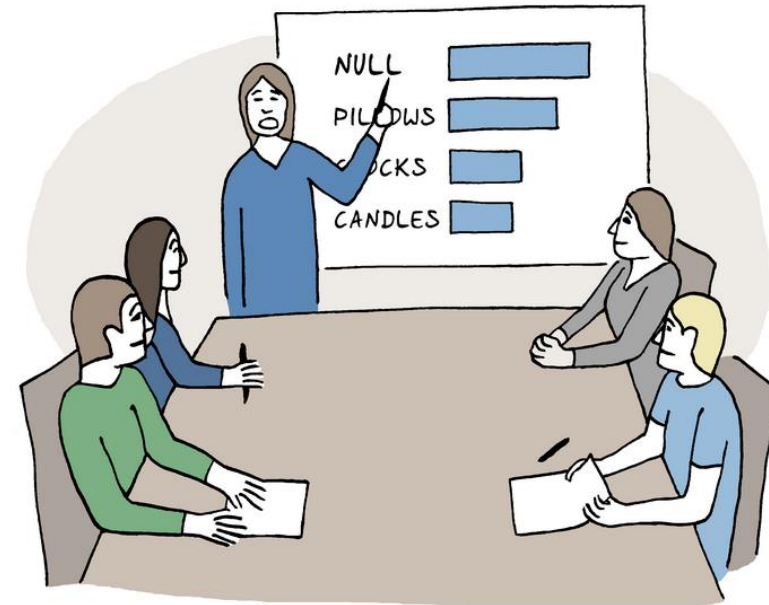
Data Value Map - Overview



How CRM Data Can Be Accurately Wrong...

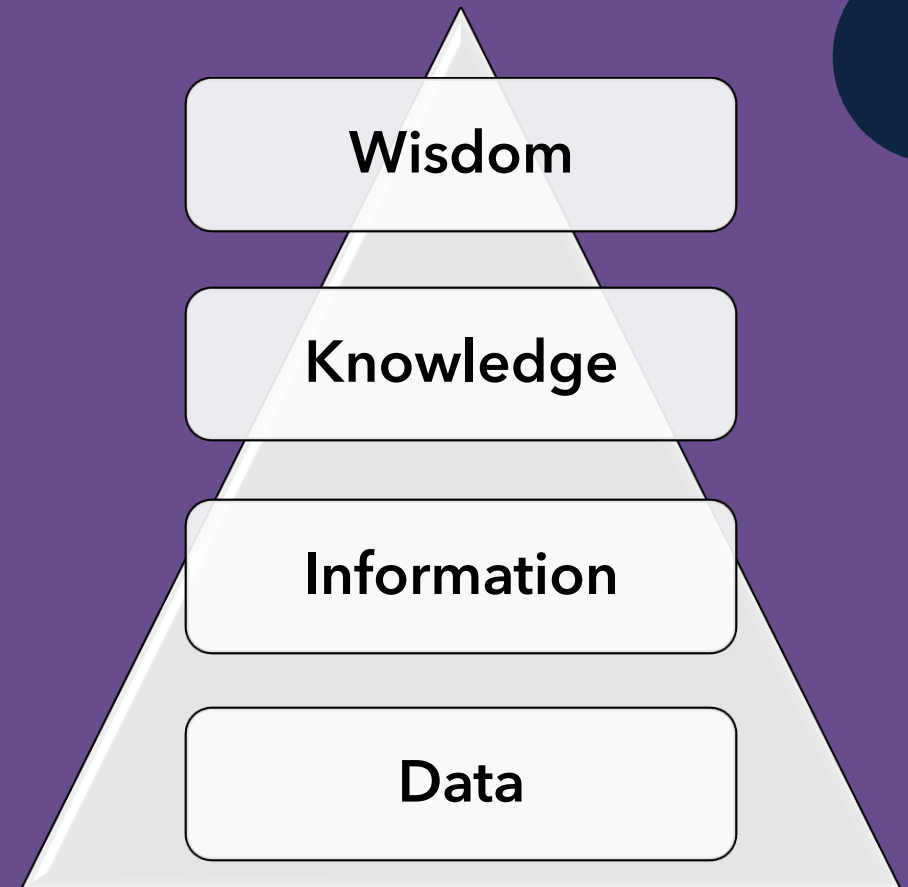
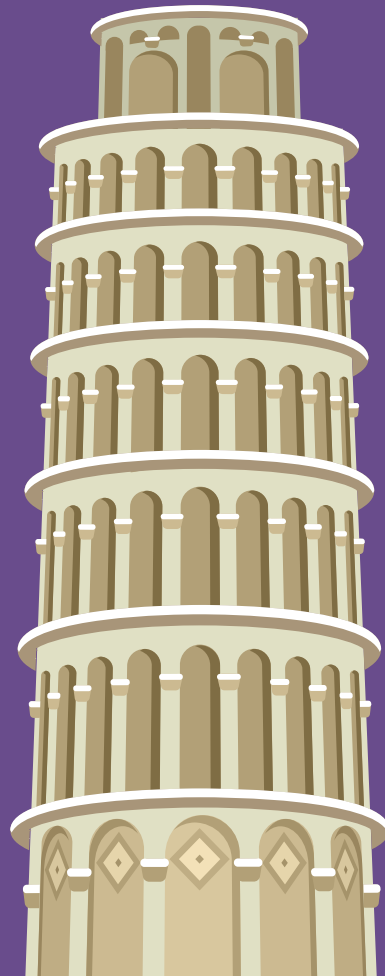


AS YOU CAN SEE, OUR TOP MARKETS ARE UNITED STATES, CANADA, USA AND THE U.S.

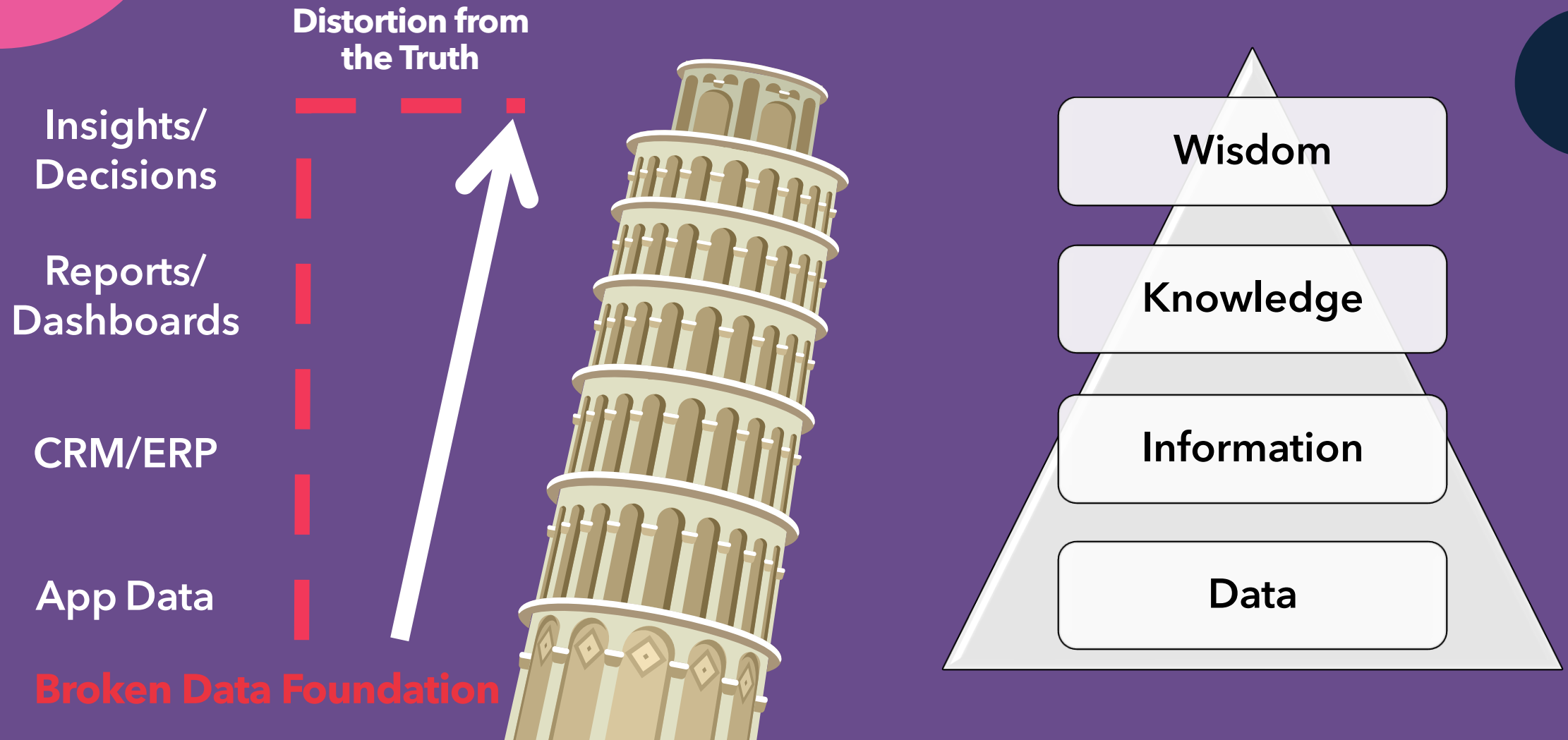


AS YOU CAN SEE, OUR BEST SELLING PRODUCT CATEGORY LAST YEAR WAS "NULL".

The Leaning Tower of Data



The Leaning Tower of Data



How To Improve CRM Data Quality



Behaviours



**Data
Cleansing**



**Data
Integration**



**Data
Enrichment**



**Automation
Tools**

How To Implement Data Quality Improvement



Assessment: Evaluate current data quality



Strategy: Develop a data quality improvement plan



Tools: Select appropriate data management tools



Training: Educate staff on data quality best practices



Monitoring: Continuously monitor and measure data quality

Some Of Our Workbook Clients



Case Study



Forum Events: Are an event company with over 21 years of experience, they faced data quality challenges, which impacted their business efficiency and marketing efforts.



Data Challenges: Duplicate records complicated the creation of new reports.

Impact: Unreliable data led to distrust in key metrics, resulting in confusion, missed opportunities, inaccuracies, and inefficient marketing efforts.



Solution: Workbooks DQ helped identify and eliminate duplicates, improving data accuracy by matching, mastering, and merging using fuzzy logic and advanced rules.



Outcomes: Forum Events, reduced their duplicate records to create a single version of the truth for better insights, reduced marketing waste and improved their marketing efficiency and effectiveness.

How To Deduplicate In Workbooks

Process: How to identify and remove duplicate records in Workbooks CRM.

Importance: Customer records consolidation to ensure a single customer view (SCV).

Record Matching

Identifying records that represent the same entity across different sources



Record Mastering

Creating a single, authoritative view of each customer by consolidating data



Record Merging

Combining matched records into a single, unified record

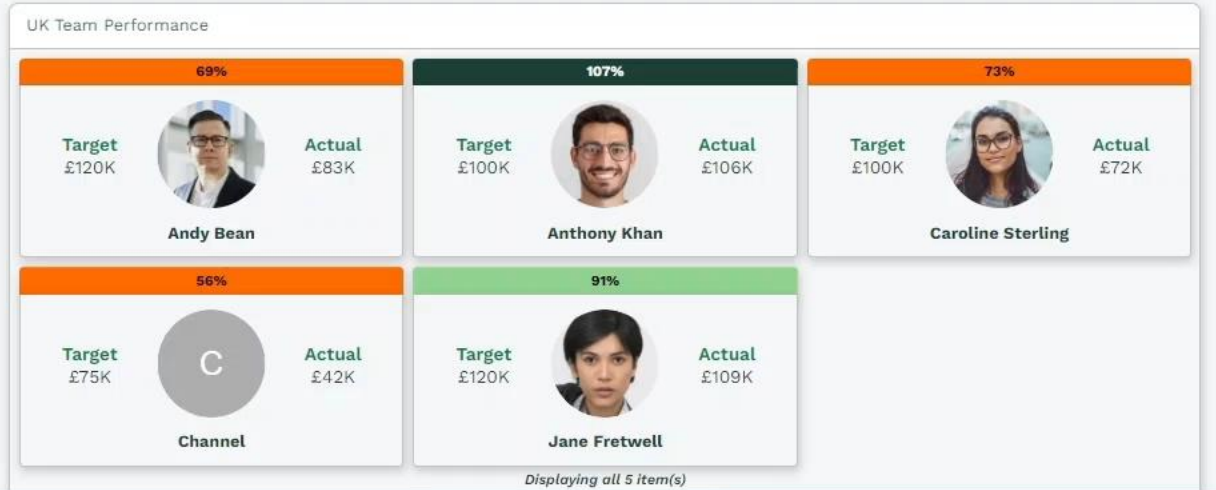
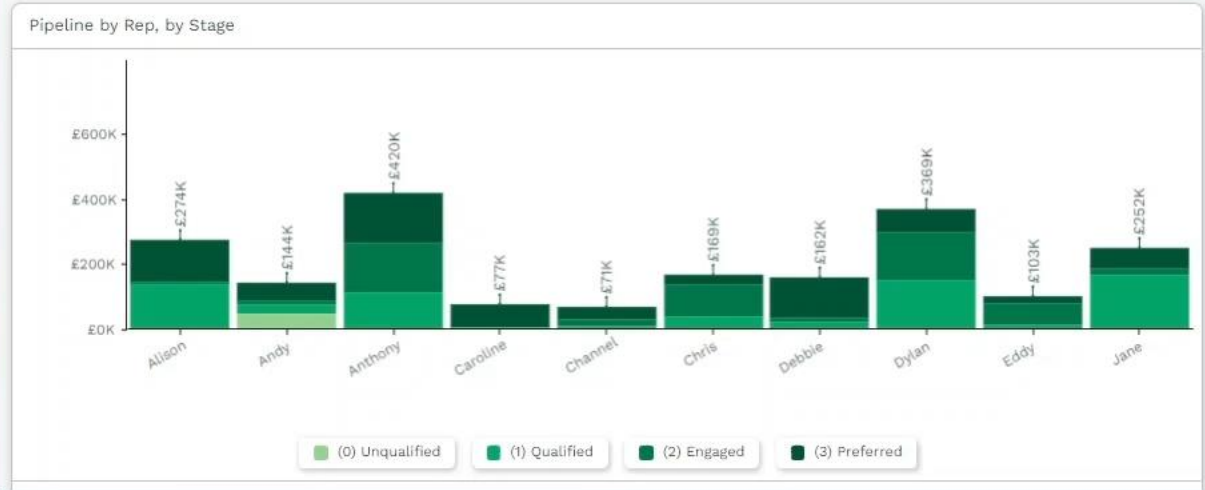
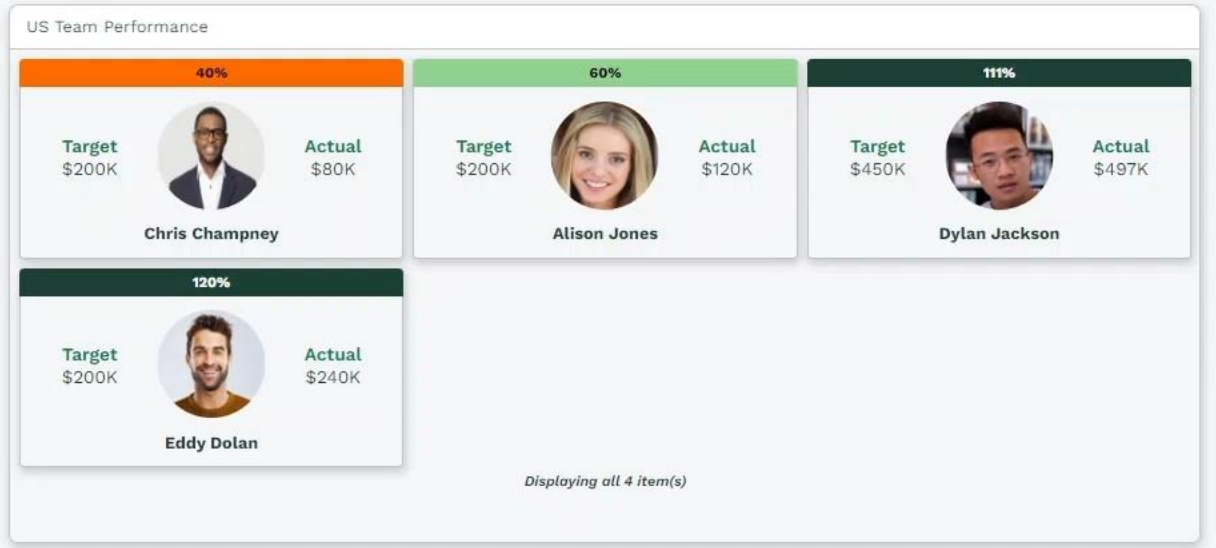
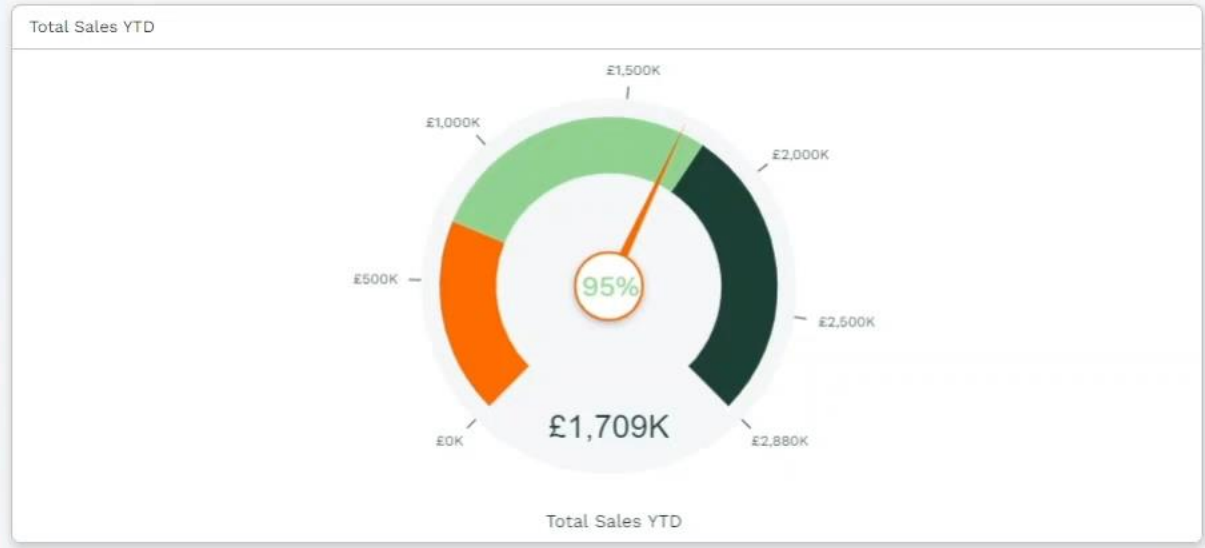
Demo of DQ for Workbooks





Sales Rep Name starts with comma-separate multiple values

View Apply filters



Are these dilemmas you face?



Keep the data or
upgrade the application?



Better data or better
analysis?



Data integrity or
application
performance?



Data standardisation or
application
customisation?



Data Cleansing or
Software Upgrade?



Data Enrichment or
Software Automation?



What's In It For You?

**Better Data
Better Decisions
Better Business**

Thank You

Look forward to connecting!



Martin Doyle



Ben Gilbey

DQ GLOBAL®
DRIVING DATA QUALITY