

Purisma

Maximizing Your
Investment in
D&B Services with
Purisma



Decide with Confidence

Introduction

In today's increasingly competitive business climate, corporations must find ways to continually increase their focus on new customer acquisition and improve their 'share of wallet' from existing customers. More often than not, success hinges on gaining an intimate understanding of prospects and customers so they can create highly targeted sales and marketing campaigns as well as high-quality customer experiences that drive new business, customer loyalty—and improved bottom-line profitability.

But understanding the customer is no easy feat. Many companies complement their own customer intelligence with external data sources, such as Dun and Bradstreet (D&B) Sales and Marketing Solutions, to help gain more detailed insight into purchasing trends, customer organizational structures, and detailed contact data. Armed with such information, companies can uncover cross-sell opportunities that ultimately result in increased revenue and customer retention.

While the D&B solution delivers a comprehensive database of information and attributes for more than 100 million corporations around the world, getting the right data to drive quality marketing and sales decisions in a timely fashion can be difficult. Companies face several challenges in maximizing their investment in D&B's service, including:

- Ensuring match quality across D&B and internal customer databases and contact records is difficult, leading to diminished accuracy, greater chance of error, and potential loss of insight;
- Customizing the view of the "customer" for different business users across the organization is difficult, resulting in poor comprehension and utilization of the matched and enhanced customer records;
- Optimizing customer contact information between internal sources and the information provided by D&B is a cumbersome and fragmented process, leading to excessive errors and duplicates;
- Exchanging information between in-house databases and the D&B information service and resolving exceptions and conflicts during this process must be done manually and usually results in many errors and exceptions; and
- Integrating D&B data with marketing databases and business applications while making sure the data is current is time-consuming and laborious.

To address these challenges, a team of sales operations, marketing, and the enterprise IT staff typically works together to build custom solutions or limit usage of the data. These custom solutions often involve database coding, custom script writing, Excel spreadsheet creation, and a significant amount of manual data correction—all of which is expensive and, often, still does not meet the needs of the business. In some cases, the custom solution solves the problem in the short term, but comes to a grinding halt because the data is not adequately refreshed, leaving the business mired in outdated data and exception management, without tools to automate the process. Without accurate customer data, the data goes unused, potential business opportunities go unrecognized, and companies see reduced return on their D&B investment.

What companies need is a tool that works in conjunction with the D&B information service to ensure accurate, timely customer information at a minimal incremental cost.

Getting the Most Out of a D&B Investment with Purisma

The Purisma Data Hub can help companies get the most out of their investment in D&B. Using Purisma's innovative, solutions-driven approach to master data management (MDM) in conjunction with the D&B information service, companies can enhance customer information, improve business decisions—and maximize their D&B investment.

Purisma addresses D&B integration issues in a flexible, automated, and scalable way. By creating a single repository of customer data that contains enriched, cleansed, and reconciled customer data, Purisma enables companies to more effectively leverage customer data in enterprise systems, data warehouses, marketing databases, and composite, SOA-based applications. The Purisma Data Hub manages the integration of customer data from across the enterprise with D&B's global database and manages the customization of customer views to meet the specific needs of multiple, functional organizations.

The following section describes in greater detail how Purisma directly addresses and overcomes the four primary challenges companies have with getting accurate data from their D&B solution.

Ensuring Match Quality

Often, D&B match rates are insufficient to meet the needs of business users. For example, when data is sent to the D&B service, a single, standardized configuration for matching is utilized. Therefore, matching cannot be tailored to meet the specific profile of the company's data and many accounts may go unrecognized. Accounts may also go unmatched because the customer record is unknown to D&B for any number of reasons. The result? The match quality does not satisfy the company's business goals.

To overcome this challenge, the Purisma Data Hub increases the percentage of records that are matched across internal systems and with the D&B solution. Purisma provides powerful, customizable match rules that can be tailored to the company's internal data for the highest automated match recognition, thereby extending D&B's matching capabilities by linking accounts that are unknown to D&B. Purisma's automated matching also increases the confidence level of potential matches identified by D&B so that companies can automatically accept the match without expensive and time-consuming manual review.

Customizing the View of the "Customer"

Another significant challenge companies encounter is that D&B's standardized definition of a corporation is often not the definition that is required by their business users. For instance, internal teams may need to customize corporate hierarchies for specific accounts. The D&B legal structuring of a major customer may be appropriate for the credit department to manage credit risk but the sales team wants to view that same customer by sales territory to more effectively target strategic accounts. The sales team may also want to exclude a large subsidiary from the parent company's hierarchy if these organizations are treated as discrete accounts with separately compensated sales teams.

To address this issue, the Purisma Data Hub builds and manages hierarchies that are based on D&B's corporate linkage information and can manage multiple alternative views of those customers. For instance, the credit department can view a company according to D&B's legal hierarchy for credit risk assessment, the sales team can view the customer's accounts organized by sales regions, and the marketing team can view the customer's accounts organized by revenue tier and industry. Purisma can also automatically maintain these hierarchies as D&B data is refreshed to reflect the latest profile for each company. These hierarchies can then be exported to the data warehouse, CRM system, or ERP system for account analysis.

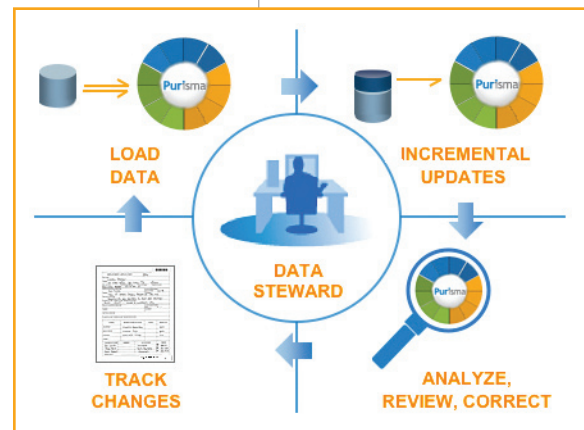
Optimizing Customer Contact Information

For marketing professionals, one of the most cumbersome and time-consuming activities is the synchronization and validation of contact information across different applications, databases, and sources. Purisma enhances and integrates contact information by aligning D&B-provided information with account information from multiple applications, optimized via Purisma's probabilistic matching engine. This allows better tracking and management of multiple touchpoints with individuals. For example, marketing can coordinate campaigns across multiple lines of business that have typically operated independently, without concern for overlapping communications.

In addition, this unification and validation of contacts across D&B and internal sources prevents the creation of duplicate contacts within the marketing database or CRM system and enables centralized tracking of opt-in and opt-out privacy requests, which can then be published to multiple marketing engines.

Automating the Information Exchange Process and Managing Exceptions

Unifying D&B file structures with existing in-house data structures and hierarchies can be a cumbersome, labor intensive and error-prone process, with the interchange and refreshment of D&B data taking weeks to complete. Invariably, the complexity and "one-off" nature of this process jeopardizes the value of the overall D&B investment. In addition, manual review and management of exceptions created by the automated matching process is required. In some cases, companies must identify and unlink incorrectly matched records. In other cases, D&B identifies potential matches that must be reviewed by the business. But no matter which of the two exception-handling situations the business faces, there are no good tools to automate or facilitate this manual process. As a result, potential matches go unresolved and incorrectly matched records remain.



Purisma provides a complete, out-of-the-box, information lifecycle management process to ensure successful integration of D&B data with your enterprise.

Thanks to its out-of-the-box integration with D&B, Purisma simplifies the complexities of file exchange and D&B data refresh. Initial processing of data and periodic updates are automatically handled, ensuring that company data is always current with D&B's latest definition of the company. Plus, Purisma refreshes data without altering the customized views that have been created by the business, giving customers peace of mind. Purisma's Data Hub also makes it easy to adapt to changing business demands for customer data. New systems can easily be added and Purisma's model-driven architecture makes it easy to modify and expand the definition of customer attributes.

And, to address the exception management problem, the Purisma Data Hub provides data stewardship and implementation of data governance processes. Using Purisma, business users can override D&B values that do not accurately reflect their view of the customer, such as SIC codes. They can also correct incorrectly matched records or manually link records that were not matched by automated matching. Purisma makes it easy for business users to focus their manual efforts on top accounts with the highest ROI for their manual investment. With Purisma's easily deployable web client, data stewardship capabilities can be made available to a wide range of business users without installing software across the enterprise.

Integrating D&B Data with Multiple Applications

After the matching process is complete, D&B returns a flat file of records that have been matched. It is then the job of the enterprise IT team to determine how to make this data available and usable to the various applications throughout the company. Historically, this has resulted in multiple, point-to-point integrations between D&B and the internal enterprise applications. Furthermore, in a service-oriented architecture, this data is needed in real time, in order to prioritize and assign leads in a timely manner or to prevent duplicate record creation.

To address the business requirements for accurate data—when and where it is needed—Purisma provides a single point for managing customer data integration between D&B and all consumption points in the enterprise. In addition, the Purisma Data Hub acts as a central location for managing all data updates, exceptions, and customization, ensuring accurate and timely data that improves decision-making.

Conclusion

Organizations invest in D&B and other external information services to maximize their ability to extend and enhance their knowledge of their current customers and future prospects. However, operational and data integration challenges often limit the return on investment enterprises receive from these information sources.

By deploying the Purisma Data Hub in conjunction with D&B Sales and Marketing Solutions, companies can maximize their investment in external data sources. Purisma automates the matching, unification, exception management, and data exchange processes, improving data accuracy and usability while reducing operational complexities.

For more information on how Purisma can help your organization maximize its investment in D&B, please visit www.Purisma.com, call (650) 306-8300 or e-mail info@purisma.com.

About Purisma

Purisma is a leading provider of a solutions-driven master data management (MDM) platform for enterprises. With Purisma, companies can, for the first time, implement highly accurate MDM and customer data integration projects to respond to specific business solution challenges without the time, cost, complexity, or disruptions of conventional MDM solutions.

About D&B

D&B (NYSE:DNB) is the world's leading source of commercial information and insight on businesses, enabling companies to Decide with Confidence® for over 165 years. D&B's global commercial database contains more than 115 million business records. The database is enhanced by D&B's proprietary DUNSRight® Quality Process, which provides our customers with quality business information. This quality information is the foundation of our global solutions that customers rely on to make critical business decisions.

D&B provides customers with four solution sets, which meet a diverse set of customer needs globally. Customers use D&B Risk Management Solutions(tm) to mitigate credit risk, increase cash flow and drive increased profitability; D&B Sales & Marketing Solutions(tm) to increase revenue from new and existing customers; D&B E-Business Solutions(tm) to convert prospects into clients faster by enabling business professionals to research companies, executives and industries; and D&B Supply Management Solutions(tm) to increase cash by generating ongoing savings from our customers' suppliers and by protecting our customers from serious financial, operational and regulatory risk. For more information, please visit www.dnb.com.

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