ENABLED DATA INTEGRATION FROM MULTIPLE SOURCES INTO SFDC PLATFORM

For a rental company in the United States

Tredence
Connect the Dots

ABOUT THE CLIENT

The client is a rental company that provides portable restroom and sanitation services including temporary fences, portable showers etc. Client's business is driven primarily by sales reps who work out of branches across the United States, they have forayed into digital sales recently.

CHALLENGE

The client was adopting SFDC as the CRM software in the organization. They wanted to identify and treat potential duplicates that could occur while merging different leads and projects data from different sources like Dodge, Web leads, Bluebook, GovWin etc.

APPROACH

We used the following approach to enable this:

- We imported all the required data elements and cleansed them to a standardized format by getting the right Lat-Long through web extraction, stop word removal, abbreviation replacements etc.

- Following this, we used statistical fuzzy matching techniques like Jaccard similarity, Jaro Winker, phonetical match, distance match, etc. to determine records which were similar.

- We then applied business rules specific to the

client's needs to ensure that certain records were not falsely flagged as duplicates.

KEY BENEFITS

- ✓ *The solution enabled the client to integrate multiple data sources into SFDC after removing duplicates to avoid redundancy of information.*

- ✓ *The entire algorithm has also been automated to run without any manual intervention and generate output files every time there is an update on the input files.*

RESULTS

- The client could merge projects and leads information from multiple 3rd party sources into their environment in a seamless manner without any duplication of information.

- All relevant information pertaining to an account was accessible in one location when a rep logs into SFDC.