

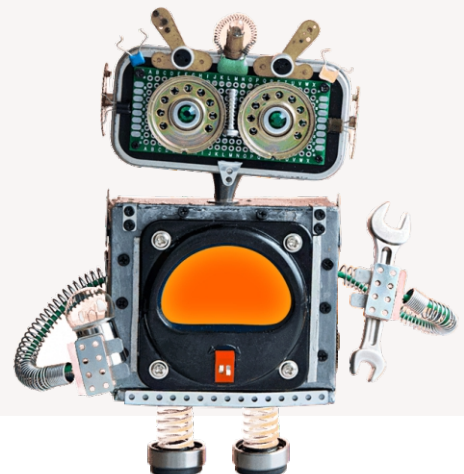
:: RevOptics
Data Diagnostics:

**Learn how to fix
your dirty data so you can
trust your analytics**



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⋮ RevOptics Data Diagnostics:

Learn How to Fix Your Dirty Data So You Can Trust Your Analytics

Data quality issues are a prevalent challenge that impacts all businesses at some point.

Gartner says

“ Poor quality data weakens an organization's competitive standing and undermines critical business objectives. ”

There's a financial impact to dirty data, too. Gartner estimates the average annual financial cost of bad data is as much as \$15 million.



Companies have received the integration message loud and clear, understanding that connecting systems to share data is critical to nearly every business function. But those integrations reveal the ugly truth about data: much of it is bad or “dirty.” It often bubbles up in the form of vital contact information errors - inaccurate, incomplete, duplicate, outdated or inconsistent data.

Data can be erroneous simply because it was entered incorrectly or something has changed, such as a customer email address. Either way, if it's wrong in one system and then you connect it to another system, it's now wrong in both systems and can't be trusted. It often leads to bounced messages or a poor

customer experience, such as getting an email with their name misspelled. If companies want to be able to trust and use their data to make decisions, it has to be clean. And if as a RevOptics customer, you want to get to actionable analytics — the part of our solution that tells marketers how their efforts are impacting revenue and what actions to take next to move the buyer through the sales funnel faster - you don't have to wait until your data is clean to start the process. Because let's face it: that may not happen for a long time. What are the opportunities your sales and marketing teams are missing because they're waiting for perfect data?

Chapter 2

Cleaning House

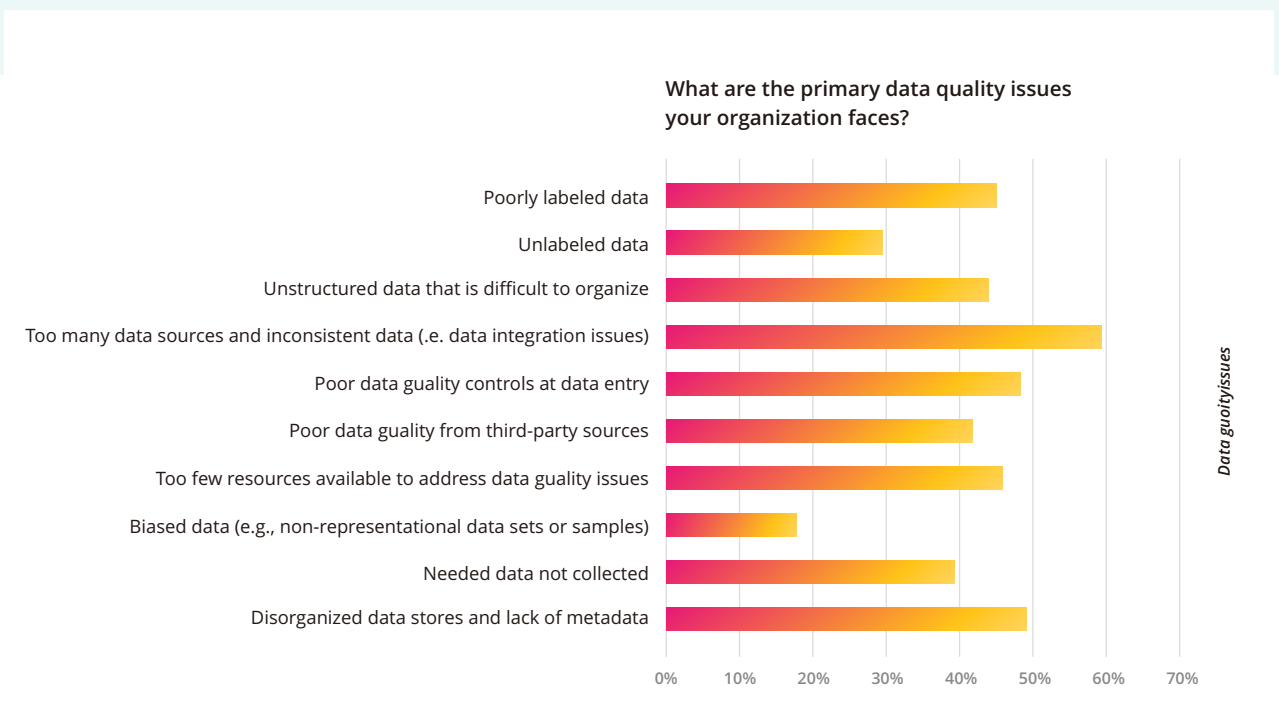
Of course, everyone wants clean data, but fixing dirty data has been intimidating, leading some to just make do with what they have. After all, you can't just do nothing, so you might as well use what you have. With data analytics such an important piece of every organization, this can be a critical mistake.



It isn't that organizations aren't allocating budgets to data analytics platforms. They are. But that's not the inherent problem. Data quality is. One study found organizations are simply managing too many data sources and inconsistent data, lacking the resources

they need to clean up the data quality issues.

The top issues? According to the study, the most common data quality problems are:



Primary data quality issues faced by respondents' organizations - O'Reilly® State of Data Quality in 2020

⋮ Chapter 2: Cleaning House

Still, while investment in data analytics accelerates, more than 50% of senior marketing leaders are disappointed in the ROI they've seen in their data analytics investments. Why? Because even though they had high hopes for their investments, the analytics can't be trusted, which means they aren't helping leaders make the data-driven decisions they so desperately want.

So, where do you begin? How do you ensure your data is accurate? The larger your data sets and the more data systems you have, the harder it gets. And as you acquire new data, fresh errors will likely come with it. Is there ever a point where you will feel confident that all of your data is valid?



Verify Solutions

RevConnect

is the tool that automatically connects systems and integrates data across multiple platforms with no coding or technical expertise requirements.

RevOptics

is the analytics platform that provides diagnostics to fix and maintain data hygiene which fuels next best actions and decision intelligence to activate your customer data.

Clean Data is Good Data

Clean data is usable data. It's data that is not only trustworthy and reliable, but it is the most powerful component in decision-making. With clean data, leaders don't guess, assume or cross their fingers anymore. While we can't guarantee that clean data leads to good decisions, it does lead to more accurately-informed decisions.

The data is there, it's up to you combined with your decision intelligence engine to know how you use it.

Harvard Business Review breaks down the steps organizations need to follow to ensure their data is clean and usable: "Sort out the data you need; measure the quality of needed data; identify areas where quality could be improved and identify root cause(s); and eliminate those causes." But how? You may know which data you need, but do you know its quality in every system, where quality is lacking, its source and how to correct it so it doesn't contaminate other systems?

Some use Business Intelligence (BI) tools, but those typically just report analytics on bad data. They don't show you where your bad data is or tell you how to fix it. It also doesn't tell you where you are missing data.

For example, when you are calculating the win rate, you need a lead source. But BI will not tell you where you are missing lead source data. That's a problem if you are trying to determine which marketing activity attracted a lead. And if a contact leaves a company to go elsewhere, how do you identify who replaced them so you can start marketing to them?

That's where RevOptics comes in. Unlike a complicated BI tool, RevOptics doesn't just diagnose your data; it heals it at the source. It tells you where your data is messed up, such as duplicates and missing data, and how to fix it so it can be used confidently to inform decisions.

How to Fix Data Quality Issues



It's great to have your data integrated, and Verify makes that easy, using its RevConnect solution. Integration is a huge step forward from traditional organizational and data silos that keep data disjointed and hidden rather than shared and accessible. But then, you need to trust the data and keep the data clean across all systems.

Most data integration tools stop with integration. That's what they were intended to do, and there are dozens of tools out there that do it well, including Verify's RevConnect.

But now you know integration is only the first step to truly getting the most out of your data. What you need is a comprehensive solution like RevOptics that keeps going beyond integration,

using machine learning to ensure your data is clean and providing automated analytics and decision intelligence so you can make the best use of your data without relying on spreadsheets.

Enterprises work hard to solve this. Data quality and data transformations are typical in enterprise-level solutions, but not all organizations need or can afford such complex software. Verify's RevOptics platform provides similar functionality but with the simplicity and cost-effectiveness that smaller, mid-market companies require and that enterprises aspire to take advantage of in order to consolidate and streamline costs

With no coding necessary or cumbersome onboarding process, RevOptics collects your marketing and sales data, and then layers in rich analytics to reveal which marketing efforts are working, which are not, and what to do next to make a greater revenue impact. And it all is supported with clean data that our Data Diagnostics capabilities facilitate. The platform is extremely robust and complex on the backend, but this complexity is shielded from the marketing user.

The Value of Data Diagnostics



Few people in sales or marketing have the time, system understanding or technical expertise to diagnose data quality issues with underlying data. They can see there's a problem, or worse, contacts see there's a problem, but pinpointing the source is next to impossible.

They may correct it in HubSpot, for instance, but that's just a Band-Aid. The next email or social campaign will have the same issues, and if the person in charge of that campaign doesn't notice or bother to change it again, it's too late. Personalization does more harm than good, messages are undelivered and your brand reputation suffers, resulting in lost revenue potential.

RevOptics automated data diagnostics takes all of the guesswork out of diagnosing problems. RevOptics shows you where the originating problem began so you can fix your data quality issues at the source - before you launch that campaign. Once it's managed there, you know that data is good to go now and in the future.

But identifying and fixing problems isn't the only value of data diagnostics. Data diagnostics give you another layer of trust in your reporting and data management practices. It allows marketing and sales leaders to stand up in meetings with confidence, presenting their pretty reports with full confidence that their data is correct. They spend less time gathering and manipulating data and more time leveraging it to inform critical business decisions.

As important as system integrations and data analytics are, it's the data diagnostic part that provides the assurance the data is accurate so that it is useful. Leaders can use it to make decisions, and campaign leaders have certainty that all of their efforts to reach their target audiences will pay off. There will be more hits and fewer misses.

Use Cases



Not all software comes with native integrations, and even those that do are often severely limited in which data can move where. Even so, if you have a native integration and need to get a new lead from a marketing automation platform to a sales team, it's best to automate that process in real-time.

You may have an existing customer and want to upsell or cross-sell so you need that data to go back into the marketing automation system. For new leads, syncing new leads, or upselling you need to ensure that the sales team has the right lead information, such as email, phone, etc.

But how do you get there? If you're like most, you are either uploading spreadsheet data to a CRM or just relying on whatever is in your CRM. Are you certain that data was entered correctly by the customer or you or another system user? Are you willing to bet your campaign on it? If you see a small error, do you know where to find the source data to fix it?

If you have data coming in from multiple sources and you want control

over data standardization and personalization, RevConnect and RevOptics are essential. Together, they ensure clean data integration, transformation and diagnostics so there is less data decay on your end. You know where the bad data is so you can better align your sales and marketing efforts for revenue success and get more accurate reporting to inform decisions. You'll be able to identify which targets need to be enriched with updated and accurate information so you can do so with ease.

The automation saves significant amounts of time and you don't have to rely on anyone else to fix the data for you so you can use it. You don't have to worry about the click to dial function not working properly because the phone number wasn't formatted correctly. You don't have to find the erroneous source data. You don't have to hope there aren't any email personalization mistakes.

Other Key Data Hygiene Features from both RevConnect and RevOptics

Enterprises are used to merging data, but integration platforms built for smaller companies don't typically have this feature. As RevConnect does its thing, it gives RevOptics less to diagnose and more accurate answers for the RevOptics decision intelligence outputs. RevOptics leverages this cleaner data to speed decisions so marketers know where to focus, what to do and when to do it with practically no effort from you.

For instance, RevConnect has rich de-dupe and transformation capabilities, merging and de-duplicating many fields, with the company name being the most common. With a click of a button, you can configure complex merge rules according to your business rules, like company to company name.

Then there are the translation tables. RevConnect can house translation tables, such as country codes and industry information. For example, System A is Afghanistan, but in Netsuite, it has to be _Afghanistan. Everything is consistent and standardized so you can spend less time fixing data and more time using it to power your campaigns with confidence.

You can see which data is moving where and what's actually occurring. We show how many moves were successful and which had errors, quarantining bad data instead of just moving it anyway and letting you figure

out what went wrong later. Our system only processes the good records that meet all of the qualifications, kicks out the bad ones and gives you visibility into what was bad about those records.

You can get details of the individual records to troubleshoot and can fix it in flight. If you need the data now, you can resolve the item in the system. You still have to resolve it in your source system, but if you are in a time crunch, you can fix it there and move on.

We show where the error is coming from and what it means so you can quickly troubleshoot. You'll even get an email telling you there was a problem, where it's coming from and how it can be resolved so you don't have to be in the system to see there was a problem. You can even set up groups, like IT, to have alerts sent per error or a daily email with a complete status update.

The RevOptics Revenue Impact Dashboard provides you with common metrics that revenue teams are being asked for — the data leaders need to actually improve results. RevOptics can identify data gaps or data problems and suggest "if you had this data, you could improve your win rate by this amount."

As another example, straight from your dashboard, without you having to mine data from spreadsheets, you see a pop-up box with the "Average Days From First Touch To Revenue" metric.

⋮ Chapter 7 Other Key Data Hygiene Features from both RevConnect and RevOptics

Within the box, you get an understandable diagnosis of an issue the system automatically detected within that measurement, the potential impact of that issue and what action you can take to remedy the situation.

The box may say, “We noticed that 30% of your leads are stuck in the SQL status. This means they have been in this stage for greater than 20 of the Average Days From First Touch To Revenue.

“When leads get stuck, this can increase the Average Days From First Touch To Revenue which ultimately increases time to revenue. Knowing where these leads are stuck can help your team optimize conversions.”

You now understand your data at a new level. You know where your buyer is stuck in their journey and what you can do to move them faster through the funnel.

Similarly, you may not fully understand why your marketing win rate isn't where you want it to be. RevOptics Data Diagnostics offers an Insights button right there on that metric tile that you can click to see what's going on.



That box may say, “We noticed that 42 of your opportunities are missing the Lead Source. Missing the Lead Source can impact the credit a Campaign could receive for influencing revenue.

When the Lead Source is populated, this could improve the marketing close rate by 78%.”

You can then go back to ensure you have the practices in place to inform that Lead Source or ask RevOptics to do it for you because we know where that data came from and have that data. RevOptics helps you validate your spend and run more successful campaigns. These metrics are at your fingertips so you can be a more proactive, confident and effective marketer.

Gain Confidence in Your Data

Data is more complex than ever. Dirty data exists in every company. First-party data is only helpful if it is clean. Third-party data is only helpful if it is clean.



The power of RevConnect and RevOptics allows for connected and clean data across your first-party data sources while also driving future revenue-based decisions based on trusted customer data.

Start now and get on the path to a continuous data cleansing motion to trust all of your systems, including your analytics tools that are driving your mission-critical revenue decisions/actions. Own your data, do not let it own you. Learn more about RevOptics and how to fix your dirty data issue, and take advantage of our analytics tools.



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