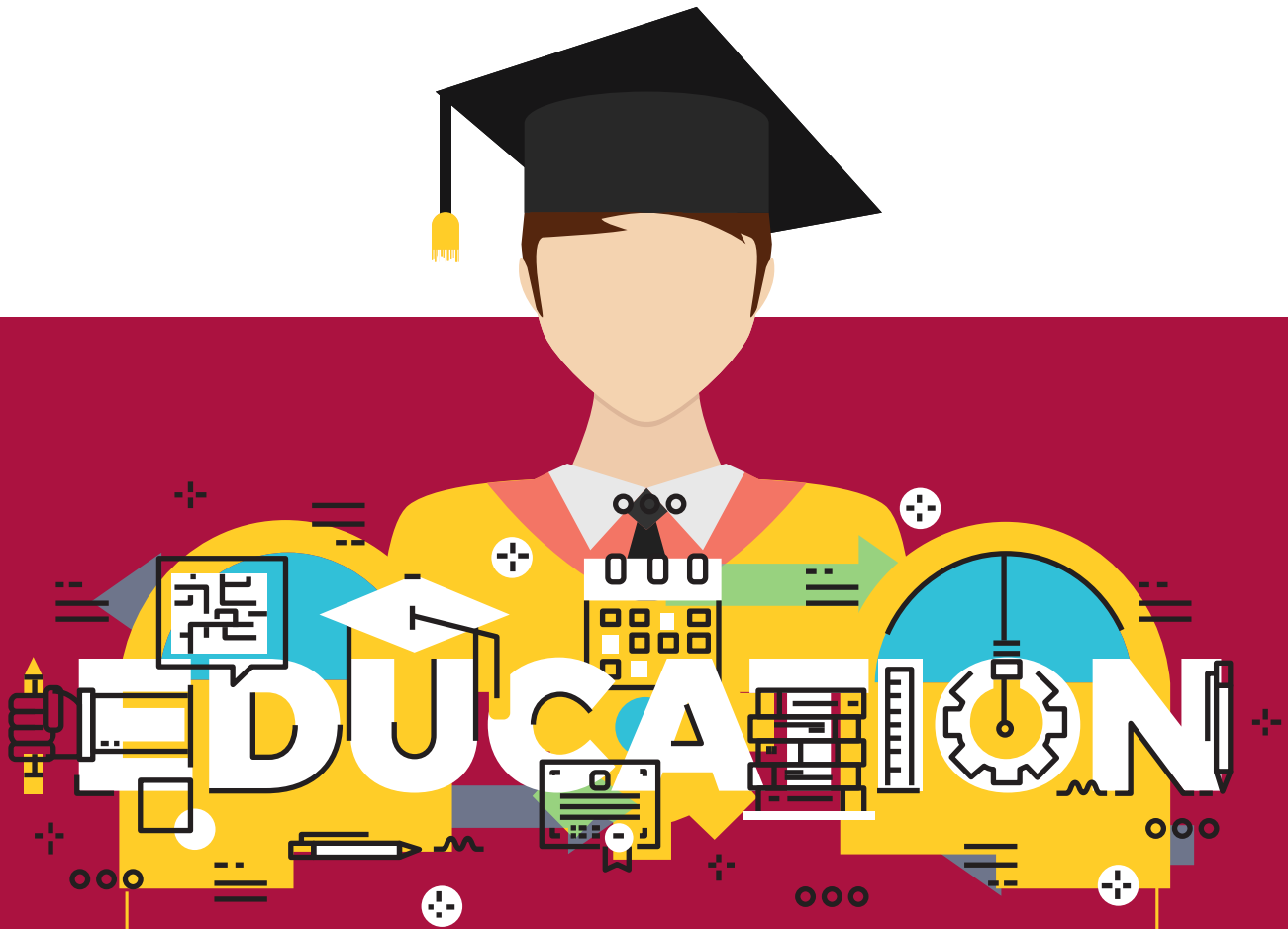# HARVARD
BUSINESS SCHOOL

EDUCATION

INTRODUCING A HIGHLY-CUSTOMIZABLE DATA DUPLICATION MANAGEMENT SOLUTION IN CLIENT'S SALESFORCE CRM SYSTEM

Suyati's Salesforce CoE developed a customizable, scalable, and flexible duplicate management feature that rigorously churns out duplicate data and provides only qualified leads to HBS. A solution that easily cherry picks valid leads from enquiries and helps boost productivity and business ROI.

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About the client

Harvard Business School is the graduate business school of the prestigious Harvard University, Boston, United States. The school offers multiple executive education programs including MBA, HBX, doctoral programs and more to develop leadership and management skills among its students. A magnificent institution that molds the leaders who can make a difference in this rapidly changing world.

Background

Harvard Business School was looking for a technical and strategic partner who can build a resilient solution on top of their current Salesforce CRM system without upsetting the core functionality. The solution must be able to avoid data duplication and provide clean data to the student coordinator of HBS who can use the lead info effectively to close deals. Suyati's Salesforce team implemented an optimal solution that helps them to derive highly customized and duplicate-free data. The solution was to churn the enquiries submitted via contact forms on the HBS website.

Challenges

Initially it might look like a minor challenge, such that the client just needs cleansed lead data fetched on to their Salesforce CRM system. The challenges posed by duplicate data heavily affected the business ROI and consumed a large amount of productive time. Here are some of the major roadblocks faced by HBS prior to employing the solutions proposed by Suyati.

◆ The HBS website is built in PHP, which is integrated with Salesforce CRM. Salesforce was implemented by another vendor way back and it was a challenge for us to understand the entire framework considering the lack of time. We were able to analyze and learn the complete logic of their existing framework in a remarkable one-day span.

◆ The website has an enquiry form that students use for course related enquiries. Each form submitted along with the details is considered as a lead. Each lead is fed into Salesforce CRM from the HBS website. Consider an example where HBS gets 10 enquiry forms with the student name as Alex asking about the details on different/ same courses. At this point, it was very critical to identify if there are any data duplicates.

◆ The student coordinator who manages the forms and the lead data had to work on multiple reports before finding out the qualified leads. Much of the fruitful time that could have wisely invested on productive activities was spent on these tedious manual tasks.

◆ Duplication of data affected the quality and efficiency of the application processing in HBS. It was extremely challenging to spot the genuine and valid enquiries.

◆ Moreover, if a student is not qualified through his/her opted course, HBS could still consider them for future campaigns. For this, those students' data should remain in the system.

Problem analysis in a nutshell

The Salesforce team at Suyati did an extensive research based on the requirements provided by the client. In short, we found from our analysis that:

◆ Every enquiry coming from a student is captured as a lead in Salesforce.
◆ Presence of duplicate leads in the system was the root cause of the issue.
◆ Client did not want any third-party apps (like DupeBlocker or Salesforce Duplicate Management system) to be introduced, as they wished to customize this de-duplication logic.
◆ HBS wanted a custom logic for capturing this data from their official PHP website & tag qualified leads for respective campaigns.
◆ HBS needed this logic to be implemented alongside a framework that was already created by another vendor.
◆ This process would target both de-duplication as well as staying in touch with their student networks.

Solutions Implemented

Suyati's Salesforce Center of Excellence learnt the trigger framework implementation done by the previous vendor of HBS. Our team had the right mix of skills to grasp the logic behind the framework, which we have not executed before. We were able to define and interpret different circumstances where data duplication may arise.

- We successfully implemented the trigger logic that finds duplicates from huge amounts of lead and contact data in the Salesforce org.
- Suyati's workaround is capable of de-duping, qualifying and associating each lead to the respective campaign.
- The code suite was delivered to the client after testing in all kinds of positive, negative and bulk scenarios.
- Automation of lead management could help the client in getting more leads that are qualified. This helps the coordinator to boost student engagement.

Results achieved

The solution laid out by Suyati has helped the client in achieving the following business as well as technical benefits:

Business benefits:

- HBS now owns an optimized Salesforce org that contains only qualified leads.
- Increased the confidence and morale of student coordinators. They feel more productive since they are confident that they are now working only on clean data.
- Analytics of the incoming leads + quality of incoming leads have drastically improved from 40% to 95%.

Technical Benefits:

The whole logic was implemented keeping in mind the following factors:

- Scalability of the system: The solution was designed taking into account all future possibilities of scaling the system to meet the evolving technical/ business needs.
- Ability to process large amounts of data: The de-duplication solution works seamlessly on trillions of data, churns out and supplies only qualified leads to student coordinator.
- Scope to increase flexibility and reduce impacts: Less coupling to other business logics that already exist in the system. This will increase the flexibility. Even if the client wants to restructure their current Salesforce architecture, the de-duplication functionality implemented by Suyati will function intact. Moreover, if the website is migrated in future, this function will work in tandem with the system.
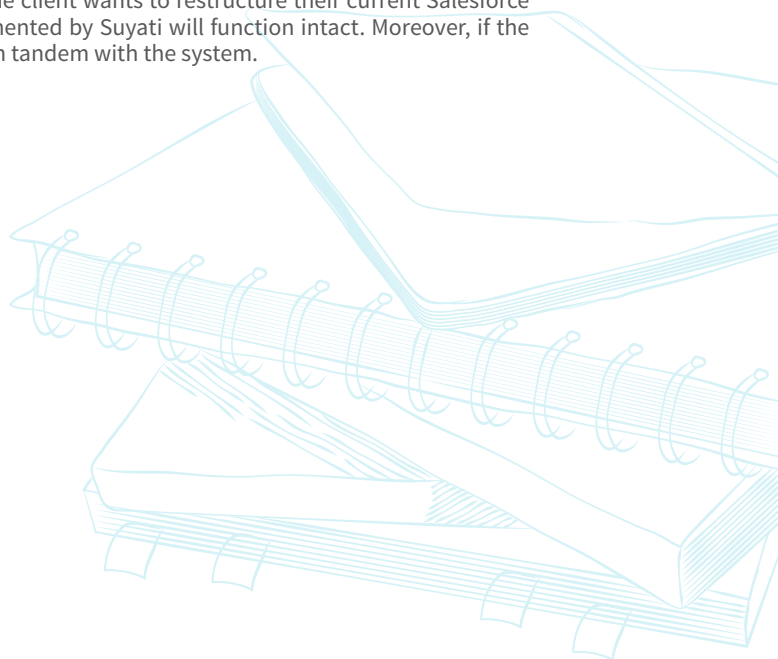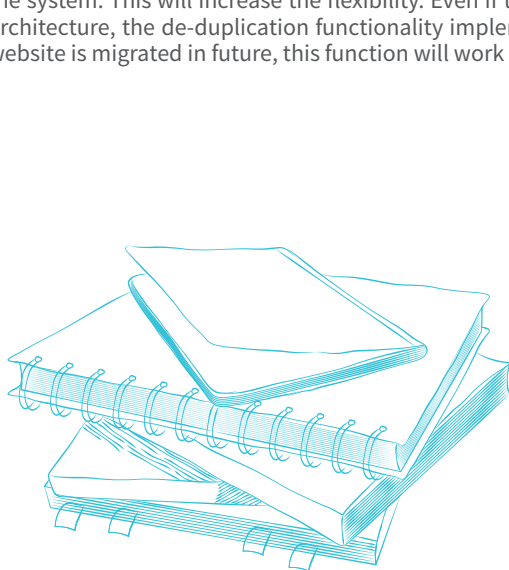
What the client says

"We have worked with the Suyati team to implement a key workflow on Salesforce.com CRM. The Salesforce team was very patient and responsive to our requests. Suyati is a "customer-first" organization and I would definitely use them again."

- **Cara Sterling, Director**
Health Care Initiative, Harvard Business School

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About Suyati

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services- CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.

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