S&P Global
Market Intelligence

CASE STUDY

Transforming Sales Enablement Data at a Global Advertising and Media Firm

THE CLIENT:

A global advertising and media firm

USERS:

The data governance and sales enablement teams

This large multi-faceted firm provides advertising and media services to thousands of clients around the world. Its many subsidiaries are Salesforce CRM users, but the company lacked a centralized, unified client database that it could efficiently leverage to support sales, marketing, and account management functions across the enterprise. The data governance and sales enablement teams felt a digital transformation was needed to consolidate information on one system, tag it appropriately, and enrich it with additional attributes.

Pain Points

Client data was held at each of the firm's subsidiaries, and protocols for identifying and labeling accounts differed from one group to another. Occasional misspellings and the use of short forms and acronyms made it difficult to identify which clients were being served by multiple groups. In addition, many of the clients themselves were large multi-faceted organizations with numerous subsidiaries making it hard to understand corporate affiliations and the total level of business the company was handling. The company wanted to have a greater view of the enterprise-wide client ecosystem by putting one universal database in place. This would help align account structures, improve territory assignments, prioritize sales initiatives, and provide a deeper understanding of the industry mix of clients under an ultimate parent organization. Any solution needed to be easy to implement, as well as easy to use in order to encourage adoption. S&P Global Market Intelligence ("Market Intelligence") was asked to present its capabilities.

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The Solution

Market Intelligence described a three-step process that would address the company's needs: (1) clean the data to consistently identify and name clients, their subsidiaries, and affiliates, (2) enrich the client profiles in Salesforce with Market Intelligence data to establish a single source of truth for company use, and (3) enable the company to continually gather additional client data by using the Market Intelligence App for Salesforce.

1. Clean the Data

Market Intelligence has an extensive database on public companies with coverage for over 99% of the world's market capitalization.[1] This is complemented with a database on over 6 million private companies. The large library of corporate profiles provides the foundation for a robust corporate family tree capability that automatically links the standardized and proprietary IDs for over nine million entities to the Market Intelligence Company ID and matches all associated subsidiaries, affiliates, and investment arms to the ultimate parent. Using this linkage would enable the company to consistently identify and name clients and understand ownership hierarchies.

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[1] All data in this Case Study is as of April, 2020.

2. Enrich the Profiles

With this clean data, Market Intelligence information on a client's address, industry, and ultimate parent could then be automatically tied to a specific record in the company's Salesforce instance. This could be further enhanced with Market Intelligence data on business descriptions, financials, key developments, and people, adding valuable content while saving time from collecting this via the Internet or other sources.

3. Continually Gather Additional Client Data with the Market Intelligence App for Salesforce

With the database cleansed and enriched, users could access client information via the customized App without ever leaving their Salesforce instance. New records could be added with one click, and existing records updated by tapping into Market Intelligence data on millions of people and companies. Users could also search for companies and people globally based on specific parameters, and then add this information directly to Salesforce. In addition, ongoing batch updates would reduce administrative overhead for maintaining the data as it changes over time.

The company felt it could significantly benefit from this digital transformation and proceeded with the initiative. Once the database was in place and operational, Market Intelligence then introduced its Kensho Link capability to further enhance the way corporate hierarchies were being identified. Kensho Link is an artificial intelligence and machine learning data solution. Users input a series of fields for each entity — such as company name, aliases, address, phone number, URL, and year founded — and the solution returns a list of suggested links for each entity, along with the model's confidence in the match. The firm has leveraged the power of Kensho Link several times now, which is especially useful as staff members continue to input variations on a company name or geography as new clients come on board.

Key Benefits

The company has seen many benefits over a months-long assignment that has helped clean thousands of records in iterative data reviews and increased usage of the Salesforce App for data enrichment. This includes the ability to:

- **Utilize Salesforce with a plug-and-play Market Intelligence App** so users don't have to leave a system they know well.

- **Access reliable data** that can facilitate detailed business analysis across functions.

- **Create more time for sales-oriented activities** by leveraging automatic updates of detailed company information.

- **Gain business intelligence** to identify opportunities, facilitate outreach, and better understand clients — directly in the company's instance of Salesforce.

- **Generate rich prospect lists** that the sales team can prioritize based on geography, revenues, and other criteria.

- **Identify possible referral business** based on work being done with another part of a client organization.

- **Obtain news alerts on clients** that may trigger a reason to call them and discuss additional work.

*Click here to learn more about the
S&P Global Market Intelligence Salesforce App and Kensho Link*

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