



How RBM Met the Rapid Scaling Demands of a Video Communications Company



Companies are facing unforeseen and unprecedented challenges due to COVID-19. To comply with social distancing, organizations have closed, and business, education and everyday social communications have switched to virtual settings.

As this new need emerged, a video communications organization received an overwhelming number of new registrants to utilize their videotelephony and online software. Facing rapid growth, they needed to scale their data integration process to qualify the influx of new registrants and the associated corporate data. Here's how Matchbook Services SaaS helped them.

The Challenge

The large video communication company needed an integrated solution to qualify potential seats in companies of a certain size and type of work, through combining LinkedIn and DUNS company data. The sudden increase of 80,000 new registrations per day was creating a massive pool of unmatched and duplicated customer records.

Their current process for collecting customer information and matching the records to their internal database is highly manual and allows room for error. Web form data is often incomplete and unspecified, which leads to low match rates through the traditional batch matching process. The majority of their input data consists of only Name, Address, and Web Domain information, which can result in a high unmatched rate. This means a slow and labor-intensive process of matching new records is

required before exporting the new data into their internal systems.

D&B initially positioned their "Optimizer" solution to work in tandem with the customer's CRM. This would automatically match and suggest supplemental matching calls to unique identifiers such as a web domain. However, this did not reduce the number of unmatched records upstream in the process mastering process.

The Solution

The Matchbook Services SaaS platform enables automation to achieve a highly accurate match rate at the initial step of the data integration process. From there, the client could continue to leverage "Optimizer" to manage the enrichment and monitoring within Salesforce. We undertook a proof of concept to identify the value we could create by addressing

unstructured process and matching challenges. The POC consisted of working with a data set of 12,500 records to cleanse and match two candidate files with representative issues they were looking to overcome.

The matching workflow for the POC consisted of a two-pass processing of the data. The first pass served as an initial cleansing, including customized auto-matching and standardization focused on Name & Address data points. The second pass was an associated web domain address to match any remaining low confidence records. By using the web domain for each record, the client could ensure that

they were matching to a unique identifier which removed the chance of duplicate records. In the first pass, we tried to find the web-domain owner within the specific country. When we did not find it there, we did a second pass match to find the company tied to that web-domain globally.

The Analysis

Through this iterative process, we improved automated matches from an initial 70-80% range up to over 95%. Manual stewardship capabilities can further increase match rates to near 100%. Resulting metrics illustrating these matching iterations are noted below:

POC Results	File 1		File 2	
Total Input	7547		4851	
Matched	6846	90.71%	4609	95.01%
Unmatched	701	9.29%	242	4.99%

Matched Data Analysis				
Name + Address Match	5302	77.45%	3850	83.53%
Domain Match	1544	22.55%	759	16.47%

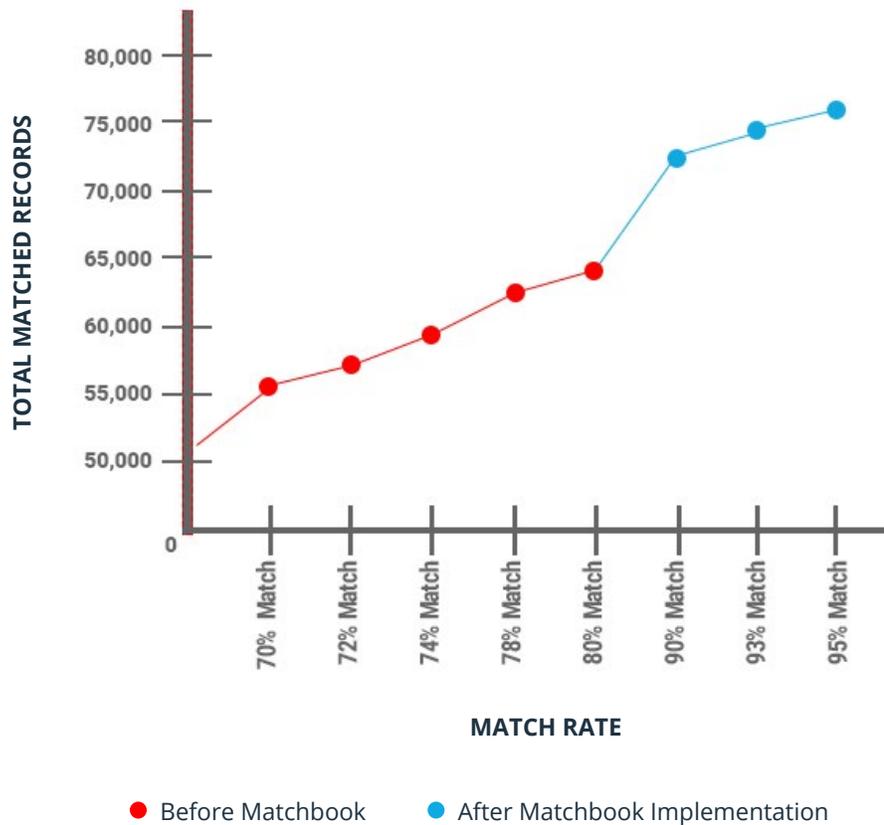
Name + Address Match Breakdown				
cc10	3874	73.07%	2184	56.73%
cc9	399	7.53%	653	16.96%
cc8	780	14.71%	849	22.05%
cc7	249	4.70%	164	4.26%

Resolution

By achieving a match rate of over 95%, the Video Communications organization will be able to successfully manage and match a 5-8x

increase in incoming data without significantly scaling their teams. They are also able to run these processes in near real-time to get more accurately matched data within their Salesforce environment.

80,000 Daily Registrants and Matching



Trying to manage an increase in data with a manual matching system? Talk to our team about the Matchbook Services SaaS and how it can automate your systems.

