

# A Quick Guide to Verifying Customer Data in Three Easy Steps.

Simple strategies for verifying every email, phone number, and postal address in your database.

## Contact Data Matters.

**This is about three of the most important fields in your customer databases: your customer's email address, postal address, and phone number.**

It's also about different ways to protect the quality, integrity, and value of these three fields.

The three contact data fields are not only the most important ways you can communicate with your customers and prospects—they're also the key identifiers that bind together your single view of the customer across all channels. They're the beating heart of your customer analytics.

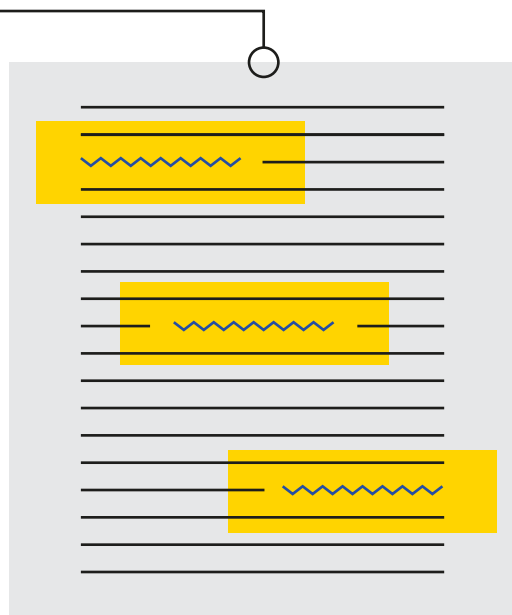
But if you're like many leaders in sales, marketing, or customer service, you might think of these fields as administrative details—things for other people to worry about.

As long as your customer contact data is being managed properly, you're right: you've got nothing to worry about.

But if your contact data is not being actively managed, you're storing up some very serious problems indeed. Problems that will leap out and trip you up in a whole range of unexpected places, all across the business, including:

- **Frustrating your customers**—by failing to deliver products, offers, invoices, and critical communications.
- **Reducing your campaign success**—with poor email list quality, you're hindering your campaigns before they even start.
- **Wasting money**—on product returns and undeliverable marketing campaigns.
- **Wasting time**—with staff searching for accurate numbers for customers or prospects.
- **Damaging your sender reputation**—with email non-delivery rates that trigger spam filters and can land you on a blacklist.
- **Making bad decisions**—distorting your customer analytics with inaccurate license keys.

All of these are entirely avoidable outcomes—if you treat your contact data like the strategic asset that it is.



## Where Contact Data Goes Wrong.

Contact data goes wrong in two ways:

**It's entered incorrectly**—by the sales reps, helpdesk agents, event staff, or the customers themselves (by accident or intentionally).

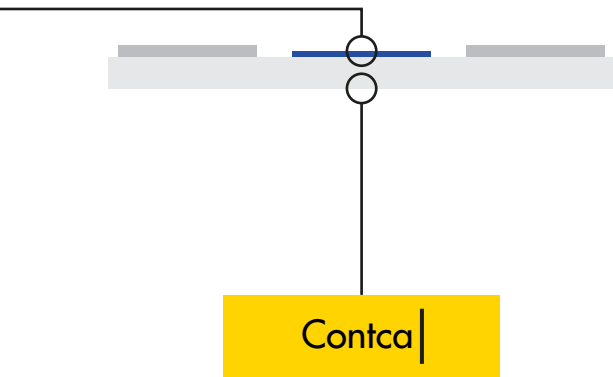
**It goes out of date**—when customers move, get a new email address, leave their job, or change phone numbers.

That's pretty much it. Bad contact data is either wrong when it enters your systems or it becomes wrong when something changes in your customers' lives.

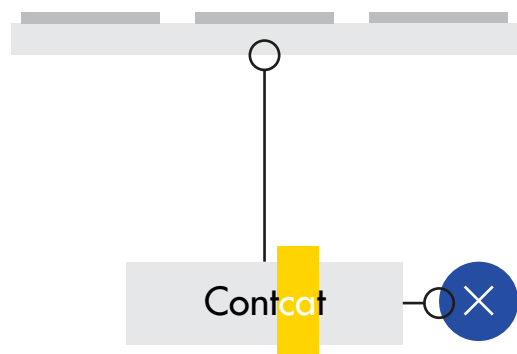
### The quick fix: contact data verification

The contact data quality problem has already been solved, with a simple technology called contact data verification.

- **For emails**, this means checking directly with the domain (such as Gmail) that the email is accurate and then ensuring it's safe to send to so you don't end up on an email blacklist.
- **For postal addresses**, it means checking the address and format with a service that has every postal certification available in the world.
- **For phone numbers**, it means making sure the number is accurate and reliable so that when your business places a call, you reach your intended customer. It also means establishing if the number is for a cell phone or a landline.



# Where Contact Data Goes Wrong.



Contact data verification automates these tasks in two ways:

**On entry**—running the check in real time and flagging any issues, either by sending you an interaction so you can stop bad data coming in, or with an alert on a web form at the point the data is entering your systems.

**In batch mode**—running regular data health checks to identify bad data and keep it fresh as the accuracy decays.

That’s pretty much all you need to know about contact data verification. Yes, there are reams of technical details that can help you choose between different solutions, but these basics will serve for now.

We’ve written this guide to show you how easy it is to verify your contact data. The rest of this guide isn’t about choosing a contact data verification solution or vendor (we’ve put our elevator pitch in that sidebar over there). It’s about how and where you can deploy your contact data verification toolset so it delivers the most value with the least hassle. For simplicity’s sake, we’re going to use Informatica Contact Data Verification solution as an example of how to deploy this technology.

### **Informatica Data as a Service: The Elevator Pitch**

We’re Informatica and we make the world’s most comprehensive and robust contact data verification toolset.

- Our postal address verification (a.k.a. AddressDoctor) is the only service that combines postal certifications from all five global postal organizations in one engine. And does so for over 240 countries and territories.
- Email verification (a.k.a. Strikelron) doesn’t use stale databases. Instead, it validates them quickly and accurately directly with the domain. And then checks to see if that email address poses a threat to your email marketing program.
- Phone number verification checks the validity of phone numbers from more than 240 countries and territories—and also tells you what time zone customers are in so your sales team doesn’t call them to discuss your latest offer at 3 a.m.

You can add data enrichment to your verification service—bringing in third-party data such as geocoding or business data enrichment with Dun & Bradstreet.

Find out more by browsing our [product pages](#) or [getting in touch](#).

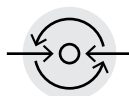
## How to Deploy Informatica Contact Data Verification: Three Options.

There are three main ways to deploy contact data verification technology, each with its own benefits and limitations. For comprehensive accuracy of contact data, it's better to use a solution that offers all three deployment options for all three contact data types—email, phone, and postal address.

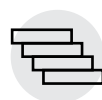
### The three options:



**1. Use a pre-integration** with your favorite marketing apps, data management tools, or pre-built integrations.



**2. Integrate Informatica services** using your team to ensure contact data is validated in the places that you need it to be, whether that's your own CRM, a web form, shopping cart, or even at a point-of-sale terminal.



**3. Run a batch data cleanse** by getting a person to run your data through the service or by scheduling regular, automated batch runs. (You can build a custom batch implementation—and if that doesn't suit, you can send it to Informatica's batch team via Secure FTP.)

Most companies choose the first or second integration method and then run the third method on a recurring basis to catch the data that's degraded.

Which method you choose will depend on your need for flexibility and control, the scale of your data challenges, and the integration skills available to you. But both the first and second methods are effective and easy.

Let's look at each deployment option over the next four pages.

## Option One

# How to Deploy Informatica Contact Data Verification: Three Options.

### 1. Pre-integration services

You're not the first person who wants to integrate contact data verification directly into your most important customer-focused applications.

So, unless you're using a home-grown CRM or contact center system, there may well already be a handy integration tool available to you (they're pretty easy to build). Two prime examples:

**Marketo contact data verification**—this ensures all contact data in your marketing automation and lead nurturing tool is in good shape and ready to use. For specifics on this integration read this short guide: [A Marketer's Guide to Having Great Marketo Contact Data](#).

**Salesforce contact data verification**—For specifics on using a pre-built app in the Salesforce App Exchange, read this short guide in [The Salesforce Manager's Guide to Having Accurate Contact Data](#).

### Pros

- You get going quickly and easily—the Marketo integration is deployed in an hour using a webhook.
- You get the core verification functionality 'out of the box'.
- The connection is pre-tested and already in use.

### Cons

- There might not be an integration tool available for the apps you use. (Seek contact data verification technology that has web services that can easily be integrated into any platform that accepts a web service.)
- You may not get the exact functionality you'd like—they're pre-configured.

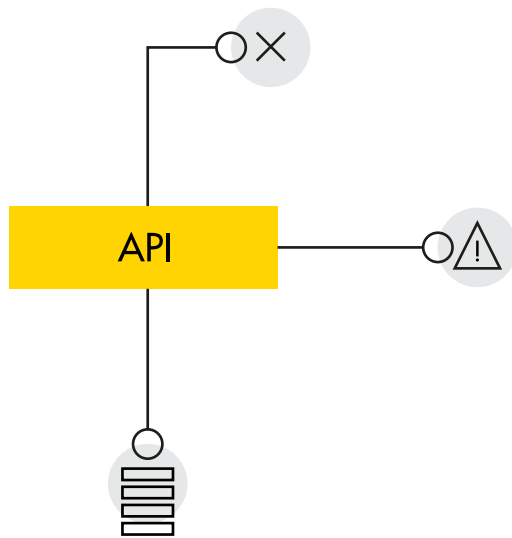
### Pre-integrations for Informatica products

If you use Informatica data management products, our contact data verification is pre-integrated with integration tools.

With Informatica Data as a Service, your data quality, master data management, and data integration (Informatica PowerCenter) solutions can all benefit from clean, validated contact data too—out of the box.

## Option Two

# How to Deploy Informatica Contact Data Verification: Three Options.



### 2. Integrate Informatica services with your team

Informatica services can be deployed through an Application Programming Interface (API). APIs are the connectors of the digital ecosystem. All of the best marketing applications and platforms can call an API, basically piggybacking on your existing digital ecosystem to run Informatica's services.

Our Data as a Service solutions use web services like SOAP or REST so any applications or platforms you use can validate contact data right inside the app.

With the API approach you can inject on-the-fly data verification at all the entry points where contact data gets into your systems. These might include shopping carts, web forms, point-of sale terminals, or home-grown customer service systems.

You decide where you want to validate and how you want it deployed, what customer experience you want to deliver, where the data goes, and in what form.

- You may want to reject a faulty address with a 'red X' and reject the web form until a valid address is entered.
- You may choose to allow bad data to be entered, but alert an administrator or data steward.
- You may want to suggest a valid postal format and pre-fill the form.

## Option Two

# How to Deploy Informatica Contact Data Verification: Three Options.

### With the API approach, you decide.

#### Pros

- Flexibility—deploy and configure your verification exactly as you like.
- Openness—you can integrate with any system that accepts a web service.
- Set it and forget it—deploy once and your data verification is set to update forever.
- Keep your postal data in your internal systems—you can deploy the postal database inside your firewall.
- Seamless to business user—the API updates happen in the background, so your IT administrator doesn't need to worry. Only really big updates that change the structure of the web service would need web development work.

#### Cons

- You need to configure it—so you'll need to decide exactly how you want to deploy verification in each instance.
- You'll need to involve your colleagues in IT (see the sidebar).
- It can take a few days (or weeks if your IT department has a long queue).

#### Working with IT

Deploying contact data verification using APIs means getting business people and IT people together to figure out the best way forward. Think customer success stories: these can be leveraged to figure out best practices and recommendations.

The business people set the end goals—what should be validated and how the experience should work. And IT works out how to implement that. You can't just throw the request over to IT and expect them to get it right first time. So schedule time with IT to discuss this now.



## Option Three

# How to Deploy Informatica Contact Data Verification: Three Options.

### 3. Batch data cleansing.

If you have historical customer data that was collected before data verification was in place—or if your data hasn't been checked in a while—you need a batch cleanse.

The process couldn't really be any easier: you send in your data by Secure FTP (as a csv file or an Excel sheet); the service validates all contact data fields and sends the results back to you.

You can do this manually or set up an automated process, running to whatever schedule you like. Some do it every quarter; others do it weekly or even nightly. But no one does this just once. That would only solve the problem today, so you'd be right back at it the week after, fighting a losing battle against data degradation.

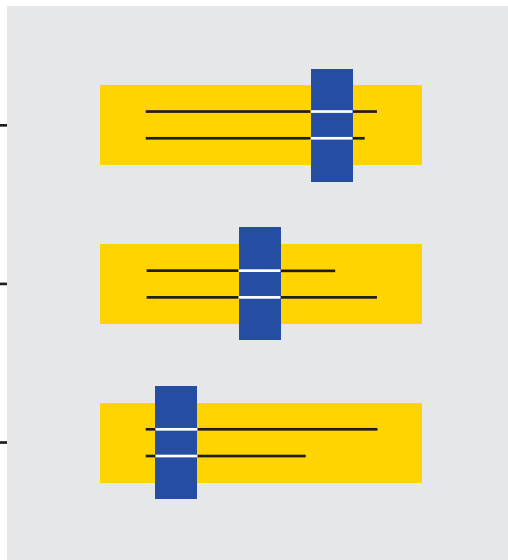
You can set up regular batch cleansing to cover you while you set up your APIs or custom integrations. Then do a run on a regular basis to counter the natural data degradation.

### Pros

- It's easy—if you can send an email or post the file to a Secure FTP, you've pretty much mastered it.
- Flexible—validate whatever data you want, when you want.

### Cons

- There are some manual steps (though you can automate these).
- It doesn't replace continuous verification on entry (it complements it).



## Conclusion

### Contact Data Does Matter.

#### **That was easy.**

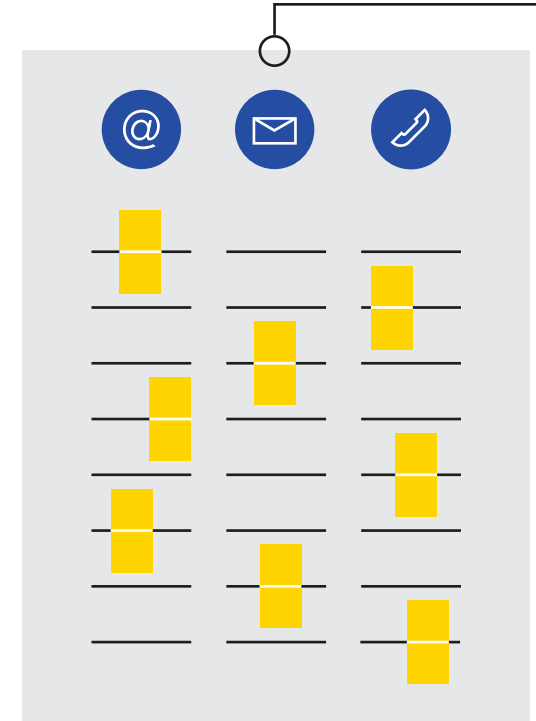
That's pretty much it: three simple ways to deploy a technology that will save you all kinds of time, money, and pain down the road. Here's the logic:

**Contact data matters**—it's how you reach out to the most important people in the world: your customers and prospects.

**Contact data verification is a no-brainer**—it solves the problem for your email, postal, or phone contacts—or all three at once. It's accurate, easy, and doesn't cost very much.

**You can deploy it as you like**—using pre-integrations, APIs, or running batch cleanses. You decide.

There aren't many business cases as short and sweet as that.



## Conclusion

### Before You Go.

#### **We're here to help.**

If you're not sure how you want to deploy your contact data verification—or would like best-practice advice on any aspect of contact data quality—[contact the Informatica Data as a Service team](#). We're really, really good at this and we love helping.

#### **Learn more.**

Check out [our workbook](#) to calculate the cost of bad contact data and make the internal case for a verification solution.

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