OPENPRISE™

DATA ORCHESTRATION BUYER'S GUIDE

KEY CAPABILITIES TO EFFECTIVELY MANAGE MARKETING & SALES DATA

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Introduction

Data orchestration platforms automate the analysis, movement, and transformation of sales and marketing data among different systems. They automate data-related tasks that are otherwise performed by tools such as:

- Spreadsheets
- General-purpose IT tools, such as database and ETL (extract, transfer, and load) tools
- Single-purpose tools, such as de-duplication applications

Modern marketers deal with large volumes of data acquired through a number of different third-party sources and a stack of internal applications. This presents an unprecedented challenge, in terms of both the volume and velocity of data. Data streams into marketing departments in different formats, with varying quality, and at a scale beyond what's manageable via manual means. To process this avalanche of data and turn it into usable insights and actions, a modern marketer needs the ability to automate the analysis, cleaning, enrichment, and unification of data in order to scale.

In this guide, we'll outline the major capabilities marketing and sales professionals need in a data orchestration solution. We'll first summarize the key capability categories, then go into more detail in each category, and finally review it all in an easy-to-reference checklist.

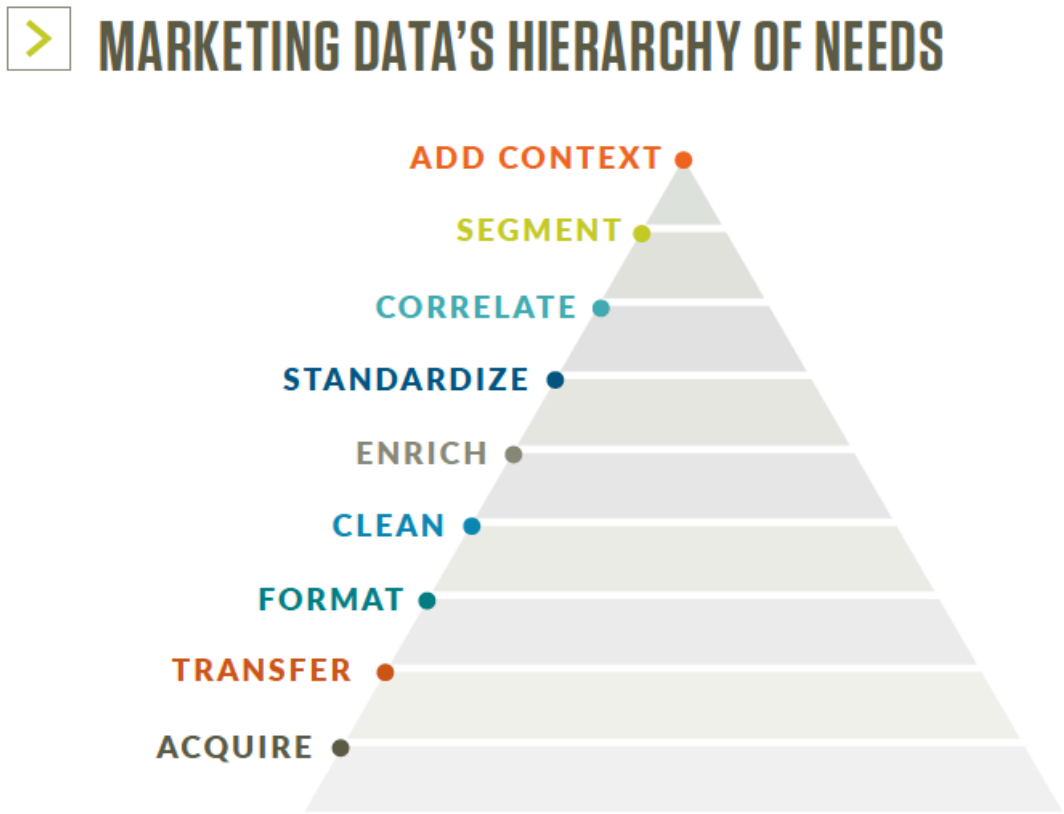
Let's get started!

Data Orchestration Key Capabilities

Marketing & Sales Data Management Overview

Before we delve into the different capabilities of a data orchestration platform, it's worth pointing out that data orchestration is not a collection of unrelated tasks. It's a structured set of tasks with strong dependencies. See the data pyramid below. Higher-level data tasks can't be easily completed without first completing lower-level tasks. Lower-level tasks such as data cleansing and standardization need to be automated in order to support the higher-level activities such as segmentation and correlation.

To learn more about this, you can download the whitepaper, "Marketing Data Management 101", at:
http://go.openprisetech.com/How-to-build-cleanse-and-refine-your-Martech-Databases.html



Lower-level tasks need to be addressed before higher-level activities can be adequately completed.

Data Transfer

Before you can work on the data, you must be able to first collect it from all the different sources, both internal and external to your organization. While email attachments and manual

downloads can be sufficient at times, automation is necessary to handle frequent data transfer activities at scale. The key capabilities for data transfer are:

- Out-of-the-box integration with common file sharing technologies
- Out-of-the-box integration with leading sales management and marketing automation applications
- Bi-directional data transfer
- Data transformation
- Data staging and archiving

Data Quality Assessment

Understanding the quality of your data helps you assess what needs to be done before it can be used effectively. The key capabilities for data quality assessment are:

- Automated analysis of data completeness and error rates
- Estimate of how much data quality can be improved by using the data orchestration platform alone
- Estimate of how much data quality can be further improved by using various data services
- Tracking of data quality trends over time
- Automatic execution of data quality improvement based on the assessment

Data Cleansing

Data cleansing is a critical and fundamental step for marketers looking to improve their programs. The key capabilities for automated data cleansing are:

- Automated cleansing of common data types such as contact name, company name, job title, email, website, address, and phone number
- Flexibility to clean custom data fields and data objects such as lead source, territory, campaign, owner, and part number
- Support for continuous and batched data processing
- Scalability of configuration and maintenance
- A catalog of reference data such as cities, states, countries, postal codes, area codes, Internet domain suffixes, free email providers, and industry codes

Data Enrichment

Once data is cleaned, it can be enriched with new fields. Adding this context helps drive your programs and processes. Key capabilities for data enrichment include:

- Deriving additional data fields from existing data components (e.g., deriving job function and job level from job title)

- Translating generic data into your specific context (e.g., remapping generic industry and SIC code to your specific target markets)
- Segmenting the database along any dimension to support your view of your market
- Correlating data across different data sources using explicit and fuzzy relationships
- Leveraging a broad range of data services to add missing data and richness

Data Security and Privacy

Data security and privacy are rarely top-of-mind for marketing and sales professionals. However, overlooking data security can derail your operations from security threats, regulatory violations, or simply loss of customer trust. The key capabilities for data security include:

- Secure management of access credentials for your systems and accounts
- Secure sharing of data using flexible policies
- Redact sensitive data on a need-to-know basis
- Automated validation of opt-in and double opt-in requirements
- Support of EU data privacy requirements like Model Contract

Data Transfer Capabilities

> *"Everybody wants insights, but before you can connect the dots, you have to collect the dots."*
>
> - *John Donlon, Research Director, Marketing Operations & Strategies, SiriusDecisions*

Marketers must deal with data from multiple internal systems and external sources. While much data is still being transferred via email or manual upload and download, the increasing volume and velocity of data acquisition require automation to ensure scalability, integrity, and speed. A capable data orchestration platform for sales and marketing data should have the following key capabilities:

Out-of-the-Box Integration with Common File Sharing Technologies

File sharing is the most common way businesses transmit data. You get a file of prospects after exhibiting at a tradeshow or promoting a whitepaper online. You get files of sales transactions from channel partners across the world. The most common file transfer mechanisms are:

- Cloud based file sharing services such as Google Drive, Box, and Dropbox
- Internal network folders
- Email attachments
- SFTP server

- Enterprise class File Managed Transfer services (MFT) from companies like Axway and IBM

Ensure your data orchestration platform has out-of-the-box integration to support the mediums you work with. Also ensure that the platform can support these common file format:

- Comma separated value (CSV) and tab separated values (TSV)
- Microsoft Excel and Google Sheet

Out-of-the-Box Integration with Leading Sales Management and Marketing Automation Platforms

Modern marketing organizations rely on two anchoring technologies:

- Sales management, such as Salesforce.com, Zoho, and SAP
- Marketing automation, such as Marketo, Eloqua, and Pardot

These applications manage the engagements your organization has with your customers and prospects. This is highly dynamic data that is continually generated and modified constantly, thus your data orchestration platform must be able to continuously extract the most up-to-date data from these applications, as well as update these applications with improved data in near real-time.

Integration with these applications is usually done via Application Programming Interfaces (API). Here are the key issues to pay attention to when integrating your data orchestration platform to these applications:

- You must have the proper level of application subscription to have API access. For example, for Salesforce you need the Enterprise Edition or higher, and for Marketo, the Standard Edition or higher. Certain applications like Salesforce also make API available as an add-on option.
- Ensure you have sufficient API quotas to meet your automation needs. Most application vendors sell higher API quota as add-on options.
- These applications often offer two types of APIs—single transaction and bulk APIs. Single transaction APIs offer fast execution, one record at a time, so they're ideal for process integration. Bulk APIs handle a large number of records concurrently, at the expense of some delay. Data orchestration platforms should leverage bulk APIs to both maximize performance and save you money on API quotas.

Bi-Directional Data Transfer

Your data orchestration platform must have bi-directional integration with your sales and marketing applications. This enables both real-time and batch processing of data without any manual intervention to import and export data. To enable bi-directional integration, data

orchestration platforms must perform extensive bookkeeping tasks to track which records have been imported, processed, and updated. These include the ability to:

- Support all transaction types such as add, update, delete, and merge.
- Compare the data to be exported with existing data in the application before exporting data back into the application to avoid redundant updates that can unnecessarily consume API quota.
- Enable multiple coordinated and uncoordinated updates to support independent and dependent data orchestration processes.

Data Mapping and Transformation

Different applications have different data formats, known as data schema. Thus, integrating data among different applications involves more than just moving the bits. It also involves transforming data into the target application's required schema. This requires the ability to:

- Map data attributes between applications and the data orchestration platform, for example, map "email1" to "email address".
- Change data type, such as number, text, Boolean, date, and IP address.
- Handle single value or multi-value data types.
- Combine multiple data attributes into one, or split one data value into parts, such as First_Name, Last_Name, and Full_Name.
- Ensure the value conforms to the target system's list of accepted values, for example, "USA" vs. "United States".

Data Staging and Archiving

When combining and correlating data from multiple data sources, the data orchestration platform must have the ability to stage the data, since data can come in at different times. Data can't simply just pass through the data orchestration platform. Most data processing tasks involve multiple steps, thus requiring intermediate data to be created to facilitate the final task. This might include, for example, extracting domains from email addresses and URLs to enable lead-to-account matching.

Your data orchestration platform should enable the staging of intermediate data without impacting the source/target applications. Solutions that process data natively in the source/target application may require the creation of custom attributes and data objects to accommodate the storage requirement for intermediate data. This creates an unnecessary burden on application owners and pollutes the application database. Pushback from application owners in accommodating such requests is common and can drastically reduce the usefulness of your data orchestration platform.

Things can go wrong when moving data across applications, whether it's due to people, processes, or technologies. When things do go wrong, the data orchestration platform should have archived data to enable rollback and recovery.

Data Quality Assessment Capabilities

Automated Analysis of Data Completeness and Error Rates

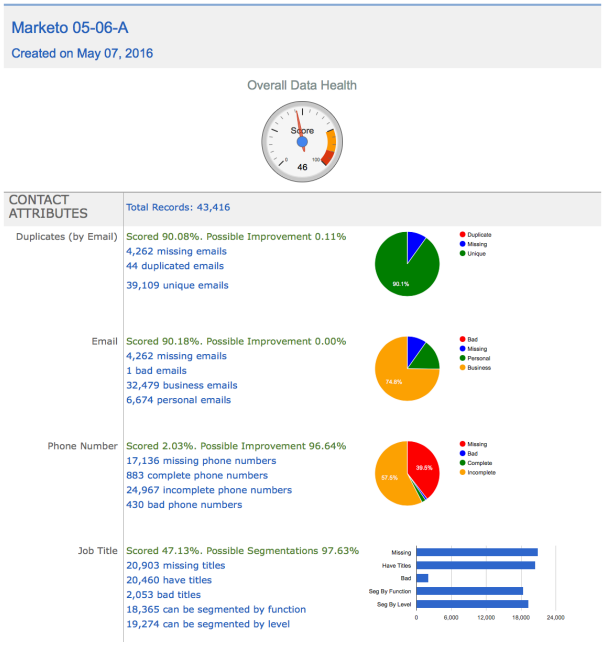
Before you embark on any data quality improvement project, you should always mark a line in the sand and establish a baseline on you data quality. This enables you to:

- Measure the effectiveness of any data enhancement initiative.
- Measure the return on investment of any data solution you deploy.
- Monitor the long term trends in your database.

Such analysis should be available out-of-the-box for the leading sales management and marketing automation solutions. The quality assessment should cover these key metrics:

- **Completeness** - Data that isn't missing.
- **Quality** - Data that's obviously bad, such as "jdoe@company.con", "not available", job title is "terminated", state value is "25", and "Californias".
- **Recency** - The age of the data in terms of last modified and creation date.
- **Accuracy** - Whether or not the data is up-to-date and accurate.
- **Category** - Some data sets have categorization of a particular interest, such as the percentage of email addresses that are business emails vs. personal emails, and the percentage of addresses that are commercial vs. residential.

Here's an example of such an assessment report.



Openprise offers complimentary data assessment reports.

Estimate Potential Improvement Using the Data Orchestration Platform

The purpose of a data orchestration platform is to improve and customize your data. So in addition to providing an assessment of current data quality, the platform should also be able to report on possible improvement in each data area without requiring any actual manual data cleansing exercise. This can include:

- Merge and removal of duplicate records.
- Correction or removal of bad data, such as telephone number "555-1212" or job title "no longer with company".
- Record enrichment by leveraging existing data, such as filling in missing city and state data based on postal code data.

By knowing ahead of time how much data can be improved without spending additional money on data services, database owners can:

- Prepare the appropriate roadmap for data improvement.
- Align projects based on data readiness / maturity.
- Select the best-fit data service based on weaknesses in the database.
- Build return-on-investment analysis for management.

Estimate Potential Improvement and ROI of Using Data Provider Services

Data orchestration platforms usually have partnerships with data providers for appending and validation services. Other data orchestration platforms even offer their own data service. Some data orchestration platforms are simply tools built by data service providers that are designed to simplify the consumption of their data. Since no data provider has the perfect database and most likely you'll use multiple data providers at any given time or over the course of time, ensure you look for an independent data orchestration platform that supports a large number of data providers with out-of-the-box integrations.

If the data orchestration platform can help you estimate how much improvement can be achieved with each data provider you are considering, it would help you make a more informed decision. This type of estimate can be achieved in two ways:

- Perform an actual append and validation exercise with a subset of your data and extrapolate the results.
- Review historical appending and validation performances across a large number of other companies' databases.

Tracking of Data Quality Trends Over Time

Data quality is not a one-time project. One Marketing Sherpas study showed B2B marketing database decays at an average rate of 2.1% per month. For a neglected database, this decay can be due to the data getting stale, and for a very active database with lots of new data, the decay can be caused by the need for data to be standardized and unified. For these reasons, data assessment should be a continuous effort. Look for a data orchestration platform that can automate quality assessment on a weekly/monthly/quarterly cadence, as well as track and report on assessment results.

Automatic Execution of Data Quality Improvement Based on the Assessment

While every company's data challenges are somewhat unique, there is also a lot of commonality across companies, especially within specific industries and companies that use the same sales and marketing applications. The best data orchestration platforms have best practices pre-packaged for easy deployment. These "best-practices-in-a-box" can go by different names like "recipes", "solutions", and "templates". These recipes should be tied to data assessment features so you can easily deploy these standard enhancements to improve your data and achieve the improvements predicted by the assessment report.

Data Cleansing Capabilities

Automated Cleansing of Common Data Types Such as Name, Company Name, Job Title, Email, Website, Address, and Phone Number

Almost any data driven marketing initiative will require you to first clean your data. There are three basic types of systems to clean data:

1. Single-purpose tools with proprietary algorithms
   This approach cleans data using proprietary algorithms with limited configurability. This approach is limited to just people and company data, and is often coupled with a proprietary database that your data is validated against. This approach offers the quickest start for standard data fields like name, title, company name, and contact information. The downside is the lack of flexibility and the difficulty in correcting the outcome if the cleaning results are not what you expect.

2. General-purpose data transformation tools
   At the other extreme are general purpose data transformation tool. This class of tools is often referred to as ETL (extract, transform, and load). These are highly capable and flexible tools designed for highly technical users who can write code like RegEx and SQL. This approach offers maximum flexibility and efficiency. The downside is the high cost and effort to create and maintain these solutions.

3. Domain-specific data orchestration platforms
   A data orchestration platform optimized for the sales and marketing professionals is the middle-ground solution between single-purpose tools and ETL tools. This type of platform strikes the balance between ease-of-use and flexibility. Since the platform is optimized or the business functions of marketing and sales operations, it can simplify the most common data cleansing tasks. Additionally, it provides the flexibility to clean the part of your data that is unique.

For automating the cleansing of common data types such as name, company name, job title, email, website, address, and phone number, Option #1 and #3 are the most effective approaches.

Flexibility to Clean Custom Data Fields Such as Lead Source, Territory, Campaign, Owner, and Part Number

No two marketing databases are the same. Every marketing database has custom data fields and data objects. Even fairly common data fields like lead source, territory, campaign owner, and part number have very unique requirements for:

- Allowable values

- Assignment and ownership logic
- Relationships to other data elements
- Lifecycle
- Specific requirements for different regions, products, and teams

Single-purpose data cleaning tools are usually not able to handle custom data fields and objects. You will either need an ETL tool or a domain-specific data orchestration platform to clean this data.

Ability to Support Continuous and Batched Data Processing

Data management tasks can be single occurrences or repetitive tasks. Repetitive tasks can vary in frequency from minute-level to year-level. Data platforms are optimized for either fully automated continuous processing or batched, semi-manual processing. No platform can be the best at both types of tasks, so pick a platform type that most closely matches the type of data tasks you have and the degree of automation you require.

A batch-centric platform excels at:

- Allowing ad-hoc user interactions with the data.
- Importing and exporting of data from a user's computer.
- Providing a large number of data importing options and few data exporting options.

An automation-centric platform excels at:

- Tracking, monitoring, and alerting based on a constant flow of data.
- Offering auto-documenting data processing requirements.
- Featuring bi-directional and deeper functional integration to fewer systems.

Make the selection based not only on your current team and process maturity, but with the expectation of where your process will be in 18 to 24 months.

Scalability of Configuration and Maintenance

There are as many different ways to configure data orchestration platforms as there are data orchestration platforms. Each solution utilizes a different mixture of:

- Rules
- Pipelines/flows
- Reference data/look-up table
- Templates/recipes
- Different styles of user interface

Everyone knows to evaluate the look-and-feel of the user interface. In contrast, scalability of configuration and maintenance is an area that is often overlooked, but is absolutely crucial in

determining the success or failure of your program. Here is how we recommend you evaluate the scalability and manageability of the platforms you're considering:

1. Pick a set of representative cleansing, normalizing, segmentation, correlation, and unification tasks you would like to automate.
2. Evaluate the number of steps and length of time required to configure the automation.
3. Evaluate the number of steps and length of time required to change the configuration.
4. Get a sense of the total maintenance effort by multiplying the effort to make such changes by the frequency of such changes.
5. Evaluate the skill set and resource availability required to perform the initial configuration and update tasks.

A data management platform that can support your project's long term success must be easy to configure and maintain.

Catalog of Reference Data Such as Cities, States, Countries, Postal Codes, Area Codes, Internet Domain Suffixes, Free Email Providers, and Industry Codes

It takes data to clean, normalize, and segment data. More specifically, it takes reference data, look-up table/lists, and mapping data. Some examples of these data include lists of:

- Geographical data such as county, state, city, and postal codes to clean address data.
- Census data that map postal codes, urban areas, and metropolitan areas.
- Country details to standardize phone number format, append language, continent, and time zone data.
- Free email providers to determine if an email is personal or business email.
- Industries, SIC and NAICS codes to normalize and segment by industry.
- Job title keywords to segment job function, job level and buyer persona.
- Firmographic ranges to segment companies by revenue, number of employees, and number of locations.

It can take more time to acquire, build, and maintain reference data than to build and maintain your automation rules. Pick a data orchestration platform that provides an out-of-the-box catalog of reference data that fits your data processing needs. These reference data are often premium options and can even cost even more than the technology license, so factor that into your budget when comparing among vendors.

Data Enrichment Capabilities

Derive Additional Data Components from Existing Data Components

Much of the data you need to drive marketing programs already exists in your database, just not in a usable format. Here are a few examples:

- Job function and job level data can be derived from job title.
- Buyer persona can be further derived from job function and job level.
- Competitor and existing technology intelligence may already exist in notes entered by sales reps.
- Time zone and language can be derived from address and phone number.
- Overall engagement level by account can be aggregated from individual engagement data.

This data is often unusable due to one of these reasons:

- The information is embedded in unstructured data.
- The information can only be derived from other pieces of data by applying business logic that is unique to your business.
- The information requires correlation of data from multiple sources.
- The information requires summarization of more granular data.
- The information requires identification of specific data patterns.

In order for the data orchestration platform to derive additional data components from existing data, it should have these basic capabilities:

- Search and map keywords from unstructured data.
- Correlate data sets using exact and fuzzy relationships.
- Aggregate granular data and perform summary calculations.
- Perform basic arithmetic.
- Provide access to commonly used mappings in the form of reference data.

Translate Generic Data into Your Specific Requirements

Perfectly clean and accurate data may still be useless unless it fits your marketing go-to-market requirements. Data that you acquire is a commodity that has limited value, until you can add the context that makes it meaningful to your business. Here are some common examples:

1. Specific market segmentation
   You have specific market segment and aggregation definitions that do not quite fit standard industry categorizations and hierarchies. For example, if your business is in Internet of Things technology, you may have a market segment called “Vending” that may include companies like Coca Cola and New York Metropolitan Transit Authority—two companies that no one else would categorize in the same industry.

2. Specific company size segment definitions
   Depending on what product you sell and what types of organizations you target, your definition of company size segments like “Small Business” and “Medium Enterprise” is

defined by your go-to-market strategy, which is unique to your business or even unique to each product line. This segmentation is also likely to change over time if you're a fast growing business with a maturing product.

3. Granular job functions
   Data you acquire may include generic, high-level job function data such as human resource, finance, and marketing. This high level job function data may be useful to suppress leads that do not fit your prospect profile, but may not be granular enough to support your campaigning and personalization efforts. For example, instead of just IT, you would like to segment a lead into granular job functions such as networking, security, and application development. If you have multiple products targeting different buyer personas, each product group can have its own perspective on how to translate job titles into job functions and buyer personas.

4. Industry-specific interpretation of common business data
   The same data can translate into different information across different industries. For example, in financial services, a director is more senior than a vice president, which is not the case in most other industries. Risk and compliance carry very different meanings across energy, healthcare, and financial services industries. Even within financial services, risk and compliance carry different meanings for retail banking, investment banking, and insurance sectors.

A key value of data orchestration platform is to help you translate generic, commodity data into data that is specific to your business, within the context you provide.

Segment the Database Along Any Dimension

Most B2B companies share common ways to segment companies along common dimensions such as industry, company size by revenue, company size by employee, and location. The same can be said about B2C companies, sharing common segmentation dimensions such as: gender, age, ethnic group, income, and education level.

Depending on your product and go-to-market strategy, you may have additional or a completely different set of segment dimensions. For example: company's number of job openings, vehicles in the fleet, mobile devices, or stores.

To help fully customize your data, a data orchestration platform should have the ability to create segmentation using any data elements.

Correlate Data Across Different Data Sources using Explicit and Fuzzy Relationships

Each data set contains only so much information on its own. Data becomes truly powerful when it is combined with other data. To combine data you need the ability to correlate it across

either explicit relationships or fuzzy relationships. Examples of correlation across explicit relationships are:

- Correlate CRM and Helpdesk data using Customer ID.
- Correlate CRM and Order Management data using Purchase Order Number.

Identification information used to explicitly link data (often referred to as a “key”) is often in different formats and must be transformed or derived before correlation is possible. Some examples are:

- Correlating a lead to an account using a domain extracted from an email address and a URL.
- Matching the order number format from one system to another such as “ABC-123456” vs. “0000123456”.

When explicit relationships are not available, likely relationships can often be established using fuzzy matching or other types of predictive algorithms. Some examples are:

- Fuzzy matching contacts without email using first name + last name + company name.
- Fuzzy matching company name across values like “Toyota Motors USA”, “Toyota Motors U.S.A.”, and “Toyota Motor Sales”.

Any data orchestration platform should be able to handle explicit correlation and transformation. The extent and sophistication of fuzzy / predictive / pattern matching capabilities is where solutions will vary. Pick the right solution for you based on the trade-offs among capability, budget, and resource requirements.

Leverage a Broad Range of Data Services to Add Missing Data and Richness

Often you may need third-party data to enrich or validate your data. This can be Open Data from sources like government agencies, universities, and public interest groups. Open Data is usually free to use and readily accessible. Other data is not. Business user, company, consumer and audience data are usually paid for.

Look for data orchestration solutions that have a combination of these capabilities:

- A catalog of third-party data offered free or at additional cost.
- Pre-built integrations with third-party data providers.
- Ability to integrate with any third-party data provider via API or data file exchange.

Data Security & Privacy Capabilities

Secure Management of Access Credentials to Your Systems and Accounts

To access your systems and data sources to input and output data, the data orchestration platform needs to have the security credentials to login on behalf of you or a system/API user. There are two ways this can be done:

1. Store a security token based on your credential
   This is the modern and recommended method of storing credentials. The data orchestration platform stores a security token provided by the target system, in lieu of storing your actual username and password. This method offers maximum security and flexibility.

2. Store your ID and password
   This method involves the data orchestration platform storing your actual username and password. This should be a last resort, used only if your target system cannot support the security token method, because it has many downsides:

   - You must trust your username and password to a third-part vendor
   - You cannot revoke access without changing your username and password, or closing an account
   - The data orchestration platform will have the exact same level of access as your user

   If the data orchestration solution you are evaluating offers this as the only method for storing access credentials, it's a tell-tale sign that its security is not up-to-par.

Secured Sharing of Data Using Flexible Policies

If you want to use your data orchestration platform to share data with a broad range of data consumers, like a global sales team or channel partners, ensure that it can enforce security policies to control access to your data. This includes:

- Controlling which group of data consumers can access which data sets. For example, the internal sales team can access both the internal sales forecast and the channel sales forecast data sets, but channel partners can only access the latter.

- Controlling which data subsets each data consumer is allowed to access. For example, while all internal sales teams can access the channel partner forecast data set, access is further restricted by territory, so the North American sales team can only see data from North American partners.

Redact Sensitive Data on a Need-to-Know Basis

If you are working with personally identifiable information (PII) and are subject to privacy regulations, ensure your data orchestration platform can support data redaction policy. Redaction is the act of disguising data so it retains only partial information. The example most people are familiar with is redacting the Social Security number to the last 4 digits.

Automate the Validation of Opt-in and Double-opt-in Requirements

In most EU member countries, and now Canada, there are strict opt-in and double-opt-in requirements that marketers must comply with. For organically acquired data, you must retain proof of opt-in. For data acquired from third parties, you often have to use a validation service to validate and acquire the opt-in. If you have the on-going need to validate opt-in using a validation service, make sure your data orchestration platform can integrate with your validation service provider.

Support EU Data Privacy Requirements, Like Model Contract

If you do business in the EU or are an EU-based company, you will need your data orchestration platform vendor to support the EU requirement for data privacy. The best way to achieve this is via the execution of a Model Contract, using contracts like a Data Processing Agreement addendum to the standard contract. Here is an example of a Data Process Agreement from Salesforce.com: http://www2.sfdcstatic.com/assets/pdf/misc/data-processing-addendum.pdf.

Other Considerations & Recommendations

As you compile your list of requirements for the data orchestration platform, also make sure you consider these factors:

- Which requirements are must-haves and which ones are nice-to-haves?
- When do you need a specific requirement? If the feature is not yet available from a vendor, does its product roadmap match your project schedule?
- Who is the intended user of the data orchestration platform? Is it designed for a programmer or a business user? What technical resources do you have access to internally or via agencies?
- Is the data orchestration platform a collection of tools that need to be integrated or is it a single platform? How does that fit your needs and access to the required skills?
- Can the data orchestration platform's cost be justified compared to the cost of your core marketing technology stack?
- What applications can the data orchestration platform support? Do you have control and access to those? For example, if a data orchestration platform is designed to work primarily with Salesforce.com and you do not have ownership of Salesforce.com, it can be very tricky to implement and manage.

- If you work with double-byte data like Asian languages, can the data orchestration platform properly support double-byte data? For example, do the rule templates, fuzzy logic, and predictive algorithms work on double-byte data?
- Is the platform delivered as a Cloud service or an on-premises software?
- If it is on-premises software, what other hardware and deployment costs are involved?
- If the platform is a Cloud service, how does it integrate with your on-premises data?

Summary Checklist

Feature / Requirement	Score	Notes
Data Transfer		
1. Out-of-the-box integration with common file sharing technologies		
2. Out-of-the-box integration with leading sales and marketing automation applications		
3. Bi-directional data transfer		
4. Data transformation		
5. Data staging and archiving		
Data Quality Assessment		
6. Automated analysis of data completeness and error rates		
7. Estimate of how much data quality can be improved by using the data orchestration platform alone		
8. Estimate of how much data quality can be improved by using various data services		
9. Tracking of data quality trends over time		
10. Automatic execution of data quality improvement based on the assessment		
Data Cleansing		
11. Automated cleansing of common data types such as name, company name, job title, email, website, address, and phone number		
12. Flexibility to clean custom data fields such as lead source, territory, campaign, owner, and part number		
13. Support both continuous and batched data processing		
14. Scalability of configuration and maintenance		
15. A catalog of reference data such as cities, states, countries, postal codes, area codes, Internet domain suffixes, free email providers, industry codes		
Data Enrichment		
16. Derive additional data components		

Feature / Requirement	Score	Notes
from existing data components, such as deriving job function and job level from job title		
17. Translate generic data into your specific requirements, such as remapping generic industry and SIC code to your specific target markets		
18. Segment the database along any dimension to support your view of your market		
19. Correlate data across different data sources using explicit and fuzzy relationships		
20. Leverage a broad range of data services to add missing data and richness		
Data Security and Privacy		
21. Secure management of access credentials to your systems and accounts		
22. Secure sharing of data using flexible policies		
23. Redact sensitive data on a need-to-know basis		
24. Automated the validation of opt-in and double opt-in requirements		
25. Support EU data privacy requirements like Model Contract		
Other Considerations		
26. Which requirements are must-haves and which ones are good-to-haves?		
27. When do you need specific requirements? If the feature is not yet available from a vendor, does its product roadmap match your project schedule?		
28. Who is the intended user of the platform? Is it designed for a programmer or a business user? What technical resources do you have access to internally or via agencies?		
29. Is the solution a collection of tools that		

Feature / Requirement	Score	Notes
need to be integrated or is it a single platform? How does that fit your needs and resource availabilities?		
30. Can the solution's cost be justified compared to the cost of your core marketing technology stack?		
31. What platforms can the solution support? Do you have control and access to those? For example, if a data orchestration solution is designed to work primarily with Salesforce.com and you do not have ownership of Salesforce.com, it can be very tricky to implement and manage the solution.		
32. If you work with double-byte data like Asian languages, can the data orchestration platform properly support double-byte data? For example, do the rule templates and fuzzy logic algorithms work on double-byte data?		
33. Is the solution delivered as a Cloud service or on-premises software?		
34. If the solution is on-premises software, what other hardware and deployment costs are involved?		
35. If the solution is a Cloud service, how does it integrate with your on-premises data?		

About Openprise

Openprise is a Data Orchestration Platform. We solve the garbage-in/garbage-out problem to make data-driven anything possible in Marketing, Sales, and Support. Openprise automates critical data management processes including data onboarding, cleansing, enrichment, and unification. Openprise is designed from the ground up for CRM, so it has the business rules, best practices, and data built right in, and it seamlessly integrates with CRM solutions like Marketo, Eloqua, Pardot, Desk, and Salesforce, so you're up and running fast.

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