



Fresno Pacific University implements address validation software within Salesforce CRM

Situation

Prospective students are entered into Salesforce CRM as leads, converted to qualified opportunities, and then included in marketing campaigns to help drive opportunity conversions (or application submissions). However, FPU recognized that incorrect prospect addresses affected staff productivity, department costs, and prospect communications.

Solution

FPU implemented Experian Data Quality address validation software within Salesforce CRM. The seamless integration was complete within days and users received a quick training video to walk them through the new address capture process.

Results

Experian Data Quality improved the quality of contact data with Salesforce CRM. With better address data, FPU expects to improve staff productivity, reduce unnecessary costs related to bad data, and encourage applicants by sending timely marketing campaigns.

About Fresno Pacific University

Fresno Pacific University (FPU) is the Central Valley's only accredited Christian university, offering leading academic programs, and ethical and spiritual development through traditional bachelor's degree, adult degree completion, master's, certificate, and credentialing programs.

Understanding objectives

FPU leverages Salesforce CRM for recruitment and admissions efforts. Prospect data is entered by staff members and student workers, through web applications and contact forms, and via external list uploads from third parties that provide prospective student data.

After prospects are entered into Salesforce, recruitment officers qualify each student over the phone and verify the person's mailing address. All qualified leads are then converted into

recruitment opportunities. FPU leverages the opportunities tab to plan and monitor marketing activities. Prospective students receive multiple mailers that highlight campus life, academic programs, and other factors relevant to the decision making process. The end goal is to drive FPU application submissions and ultimately hit admission targets.

Identifying Errors

It is easy to mishear, mistype, or misunderstand someone when capturing information over the phone or submitting information online. And with multiple student workers and staff members to train, it is difficult to preserve consistency. Finally, recruitment campaigns include prospects from external lists that are often riddled with mistakes.

With the difficulties mentioned above, it is no surprise that data errors occur frequently. These errors are often due to incorrect or incomplete information and exist across all capture channels, making validation an important step within FPU's process.

"We validate contact information during the qualification process," said Jonathan Maher, Institutional Research Data Analyst at FPU. "This ensures interest in the school and also data accuracy. When data errors are found, the staff member updates the record within Salesforce."

Quantifying the problem

While FPU manually validated contact information over the phone, this process was not perfect. Staff members still have the potential to miss data errors or create new errors. And these seemingly small address errors affect recruitment activities and cost FPU time and money to repair.

For example, prospective students receive one to four direct mail campaigns each recruitment cycle. And for each campaign, prospect records are exported from Salesforce and CASSTM Certified prior to deployment.

"We pay for CASSTM certification every time we do a mass mailing in order to get the best mailing rate," said Maher.

Changes to the mailing file are included in the campaign (and either manually updated within Salesforce or left as is). "Also, CASSTM Certification fees are supplemented by costs related to unnecessary printing and mailing expenses, staff rework, and time spent on opportunities that will never convert."

Implementing technology

FPU implemented Experian Data Quality address validation software within Salesforce CRM. "We saw a demo and it was a no brainer for us," said Maher. "The tool is easy to enable, user-friendly, and consistent within our Salesforce workflow."

FPU installed the functionality within a few hours, tested for a few days, and then pushed it live to users. When asked about user adoption and workflow, Maher said, "It's nicely integrated and not intrusive to staff members."

Now, staff members are guided through the address capture process to ensure fast and accurate entry. When the address is incorrect or incomplete, Experian Data Quality prompts the user to update the necessary information while the data is still fresh or the prospect is still engaged over the phone.

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— Jonathan Maher, Institutional Research Data Analyst, FPU

Additionally, web submissions now trigger the address validation functionality. Addresses submitted via web forms are verified and standardized within seconds of creation, ensuring that leads are routed appropriately.

Lastly, batch address validation is now seamlessly integrated within FPU's Salesforce environment. The tool facilitates easy selection of record criteria and summarizes results to facilitate error resolution.

Recognizing results

Incorrect addresses affect mail deliverability and therefore, signify a monetary loss and a potential applicant loss. With Experian Data Quality, FPU ensures prospect data quality.

By using QAS for Salesforce, FPU expects to improve staff productivity, reduce unnecessary costs related to bad data, and encourage applicants by sending timely marketing campaigns.



About Experian Data Quality

Experian Data Quality is a global leader in providing data quality software and services to organizations of all sizes. We help our clients to proactively manage the quality of their data through world class validation, matching, enrichment and profiling capabilities. With flexible SaaS and on-premise deployment models, Experian Data Quality software allows organizations around the world to truly connect with their customers by delivering intelligent interactions, every time.

Established in 1990 with offices throughout the United States, Europe and Asia Pacific, Experian Data Quality has more than 13,500 clients worldwide in retail, finance, education, insurance, government, healthcare and other sectors. For more information, visit <http://www.qas.com>.

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