

Cloud MDM Customer 360 for Salesforce

Key Benefits

- Maintain a single customer view
- Merge data from external systems
- Verify contact information with third-party systems
- Manage multiple, complex hierarchies

Propel Your Sales Team to Success

You invest in Salesforce to deliver information to your sales professionals and sales operations so they can be more efficient, aligned, and effective. It centralizes sales opportunities and creates visibility to customers and activities that shape your long-term strategic decisions and daily tactical activities.

And with the critical nature of Salesforce to provide sales insights, keeping your Salesforce data clean is more important than ever. It's up to you to keep the data in Salesforce from becoming stale, duplicated, inaccurate, or incomplete. You can do this by building a trusted single customer view in and across your Salesforce orgs.

Keeping a single customer view within Salesforce can feel like a daunting exercise, especially when multiple sales organizations and acquisitions result in multiple Salesforce environments.

With an authoritative view of a customer, lead, and account records, you can increase Salesforce adoption and ensure confidence in your customer information. Not only that, you can merge data from external systems, verify contact information with third-party systems, and manage multiple, complex hierarchies – directly within Salesforce.

Informatica delivers a set of focused cloud services and solutions that address the primary data quality and master data management (MDM) challenges of a business. Informatica Cloud MDM Customer 360 for Salesforce helps organizations of all sizes manage, match, and merge their data directly in Salesforce to achieve a single customer view within 6 to 12 weeks.



Capitalize on the capabilities of Salesforce and Keep Your Data Clean

You know that your customer data changes often. But your sales professionals are busy closing deals and have little time to keep account information in Salesforce current and accurate.

Customer 360 for Salesforce eradicates duplicate, inaccurate, and incomplete account, contact, lead, and custom object records, leaving more time for your sales professionals to do what they do best: produce revenue.

It provides clean, trusted data, increases Salesforce user adoption, and boosts ROI as it:

- Gives you a real-time view into the quality and completeness of your data through a user-friendly interface.
- Searches at point of entry for existing accounts, contacts, leads, and custom objects to identify and prohibit duplicate records.
- Validates email, phone, and address data for accuracy, and automatically detects and corrects erroneous data found in Salesforce org.
- Matches and merges customer records from different data sources and other Salesforce organizations and delivers the ability to confidently auto-merge or individually review and manually merge when combining records.
- Provides multiple views of different hierarchies that exist in organizations, such as accounts, sales, and billing, to understand the different relationships within and across companies.
- Inherits all security and role-based permissions from your Salesforce org.



Figure 1: Cloud MDM Customer 360 for Salesforce provides sales teams with easy access to the reliable information they need to fuel high-value conversations, activities, and deals. And sales management gains confidence in the forecast and pipeline.

Build Smarter Customer Relationships with Unified Customer Records within Salesforce

Customer 360 for Salesforce allows for a more relevant and complete view of your customers and their relationships. It constructs a more comprehensive customer record in Salesforce and can:

- Automatically consolidate customer data directly within Salesforce from multiple cloud and on-premises systems such as SAP, Oracle EBS, Oracle Eloqua, Marketo, and NetSuite.
- Populate customer records within Salesforce with information from existing mastered records from Informatica MDM, for more efficient completion of customer records.
- Relate contacts, leads, opportunities, and custom objects to accounts in any number of different ways to create robust customer relationships within Salesforce.
- Enrich records with third-party information within Salesforce through Informatica Data as a Service or other third-party providers such as Dun & Bradstreet.

Coordinate Across Multiple Salesforce Organizations to Maximize Investment

Customer 360 for Salesforce employs best practices to unify Salesforce processes and standards and coordinates multiple Salesforce organizations in a way that matches your business model. This provides greater flexibility and:

- Helps distributed teams collaboratively identify cross-sell and up-sell opportunities across the company.
- Provides the global visibility required to accelerate opportunities and track campaign influence across multiple business units and products.
- Facilitates migrations to Salesforce from other CRM systems and accelerates the value of mergers and acquisitions.
- Delivers multiple customer hierarchy views, such as account, sales, and billing, to fit different corporate objectives.

About Informatica

Digital transformation changes expectations: better service, faster delivery, with less cost. Businesses must transform to stay relevant and data holds the answers.

As the world's leader in Enterprise Cloud Data Management, we're prepared to help you intelligently lead—in any sector, category or niche. Informatica provides you with the foresight to become more agile, realize new growth opportunities or create new inventions. With 100% focus on everything data, we offer the versatility needed to succeed.

We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption.

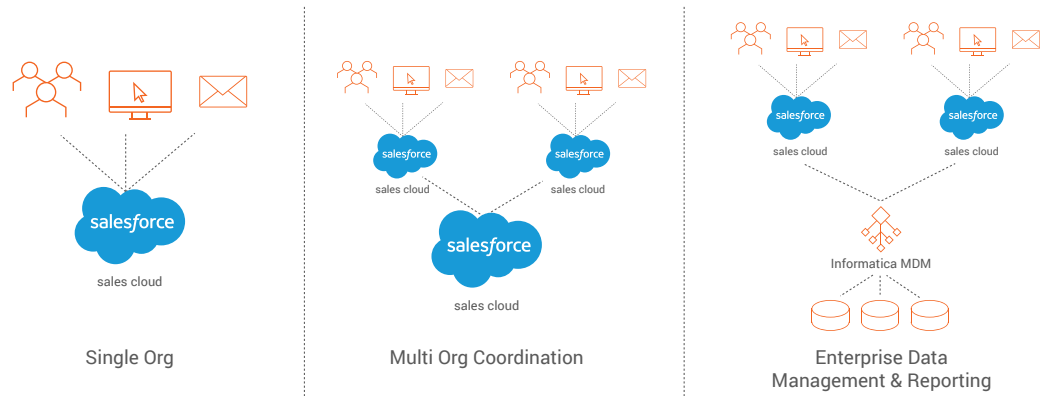


Figure 2: Cloud MDM Customer 360 for Salesforce delivers a single customer view within a single Salesforce org. It also synchronizes across multiple Salesforce orgs as a strategy, or as a result of mergers and acquisitions, and as part of an enterprise data management strategy.

About Informatica Cloud MDM Customer 360 for Salesforce

With Customer 360 for Salesforce, your data never leaves Salesforce, and your data never looked so good. Customer 360 for Salesforce is a native Force.com application that resides in Salesforce to support both the IT organization and the business in pursuit of data excellence.

Poor data quality costs more than many companies think. Don't just de-duplicate your data; master it to gain global account visibility in Salesforce, accelerate sales performance and productivity, increase adoption, and maximize your Salesforce investment. Informatica Cloud MDM Customer 360 for Salesforce increases the value of your investment with better lead conversion, customer targeting, and up-sell and cross-sell outcomes.

For further reading and to access additional resources, visit our [web page](#).



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