Informatica Cloud MDM for Salesforce: Hierarchy Management
Table of Contents

Introduction .......................................................... 2
Hierarchies Defined ...................................................... 2
A Complex, Multi-Tiered Hierarchy ................................. 2
The Benefits of Data Hierarchies ....................................... 2
Hierarchy Management with Salesforce.com ....................... 3
Hierarchy Management with Salesforce and Informatica Cloud MDM .......................................................... 3
   Multi-View Hierarchies ................................................ 3
   Multi-Source Hierarchies .............................................. 4
   Multi-Type Hierarchies ................................................. 5
Conclusion .................................................................. 6
Introduction

This paper explains the concept of hierarchies, outlines how to use hierarchical views of customer data within Salesforce, and presents various approaches you can take to ensure that you benefit from their use.

Hierarchies Defined

A corporate hierarchy is a multi-tiered information structure where data ultimately rolls up to a parent or top level entity. The hierarchy typically delineates relationships between a parent and its subsidiaries as well as the lines of business within those subsidiaries. Corporate hierarchies can help us to understand changes in ownership brought about by mergers and acquisitions.

Companies that sell through partners or distributors also use hierarchies to visualize how various entities relate to each other by location or business. For example franchisors often use hierarchies to track and compare performance between different franchise owners, locations and sales data.

Hierarchies are also important in many business-to-consumer (B2C) markets. Retail banking for example uses hierarchies to map bank accounts to customers and addresses. Hierarchical mapping clarifies the relationships and to help the bank cross- or up-sell different consumers more efficiently. For example visualizing the hierarchy helps the bank recognise the difference between multiple account holders at a single address (different individuals with distinct accounts) versus account holders with multiple addresses (joint accounts that allow individual consumers to be co-signer on different accounts, at different addresses).

A Complex, Multi-Tiered Hierarchy

In addition to hierarchies of the same type of data, different groups within enterprises require hierarchies of different types of data. One group may categorize customers by DUNS numbers, while another group segments customers by specific products. Another group, say partner or distribution program managers, may categorize customers by geographical purchases or the price paid for products. Each viewpoint is equally important and organizations must utilize each one in order to efficiently sell, service, and retain customers.

The Benefits of Data Hierarchies

Mapping—and managing data hierarchies—offers four distinct benefits:

- **Clearer Visibility.** A data hierarchy can help you create a view of your customers and prospects that informs business strategy.
- **Better Reporting.** A data hierarchy allows you to see a connection among accounts that can benefit marketing, sales, legal, and procurement.
- **Smooother Selling.** Unlocking the value of existing customers is easier than acquiring new ones. Identifying subsidiaries or branches of established accounts offers the best of both worlds—selling into a business where you have already built a reputation, while also bringing a new customer on board.
- **Effective Territory Management.** Knowing who is working with an account can enable you to leverage sales teams more effectively and reduce costs by bringing sales efforts into better alignment.

Implementing data hierarchies provides a complete view of your customer data that can be sliced and diced in many ways, allowing you to see how your customer is positioned relative to other entities. A thorough understanding of interactions and issues can help you take the appropriate action to build and strengthen your customer relationships.
Hierarchy Management with Salesforce.com

Salesforce.com offers some native hierarchy functionality—built on a parent/child structure—that makes it possible for users to visualize relationships within the CRM environment. This functionality can be customized, but it is a manual process. Creating data hierarchies that meet the needs of different Salesforce users can also be difficult and time-consuming, especially if a hierarchy is larger than two or three tiers deep. Native Salesforce functionality also struggles if various parts of the business interact differently with the data. Because of this, the nature of Salesforce hierarchies tends to be static. In addition, as enterprises grow through mergers and acquisitions and/or expand globally, the complex-to-manage solution often produces a data hierarchy that is never quite current.

Hierarchy Management with Salesforce and Informatica Cloud MDM

There are several approaches to creating a robust and dynamic data hierarchy with Informatica Cloud MDM.

Multi-View Hierarchies

Salesforce allows you to view the data hierarchy in context of the Account you have open. However, it only provides the ability to see the Contacts, Leads and Opportunity objects associated with the parent Account, and not for any subsidiaries. For example, an Informatica Account object hierarchy might contain Address Doctor and Heiler as subsidiaries, but standard Salesforce only show the data associated with the top level parent - Informatica.

Informatica Cloud MDM when added to Salesforce provides the ability to see all Contact, Lead and Opportunity objects across the entire account hierarchy including subsidiaries. Therefore marketing and sales can use the multi-view hierarchy track campaign influence or identify cross- and up-sell opportunities across the entire company.

Figure 1: Account Hierarchy View Containing Contact, Lead and Opportunity Data.
Multi-Source Hierarchies

Different applications and data providers, such as Dun and Bradstreet (D&B), Oracle and SAP often define hierarchy relationships within their applications or services. SAP for example, often used by companies for financial tracking and ERP, defines hierarchies based on financial segmentation. While D&B creates company hierarchies based on a unique nine digit identification number that define a physical location of business. Many other companies have the custom and/or legacy systems that they use to define hierarchies.

Cloud MDM provides the ability to create, manage and view new hierarchies from multiple-data sources within Salesforce. Therefore, when looking at the parent account object you can view the SAP ‘view’ of the account hierarchy, the D&B hierarchy, or a custom hierarchy.

Calling upon multiple data sources adds richness to your account view, for example:

- **SAP.** Use the SAP financial hierarchy to view past transactions from your ERP system of record.
- **Dun & Bradstreet.** Use DUNS numbers for the legal view required for compliance or contract tracking.
- **Custom Source.** Whether your business is to provide data to a specific industry or vertical or if you have a specific custom way of tracking data

![Figure 2: Creating and Viewing Hierarchies from Multiple Data Sources.](image)
Multi-Type Hierarchies

You might also want to categorize hierarchies based on business unit type or prebuilt legal, franchise or sales type rules. For instance sales might want to track company hierarchies from LinkedIn or product sales. Or if the enterprise sells to franchise organizations, you can leverage a multi-type hierarchy for a dynamic view of how these individual outlets are growing and changing.

Informatica Cloud MDM offers users the opportunity to leverage multiple hierarchy types to deliver a single view of the customer. The legal department for example, could use hierarchical data to uncover contract or compliance issues. The sales department could use a different hierarchy to identify cross-sell or up-sell opportunities. Finally, the marketing department could use a different hierarchy to tailor messaging to specifically target customers or prospect subsidiaries.

Figure 3: Using a Dropdown Box to Dynamically Switch Between Different Hierarchical Views
Conclusion

Managing how you interact with customers or prospects can be a difficult challenge, especially if your data views are static and out of date. Without a single dynamic view of your customer data, you may not grasp the full story on your customer and partner relationships, thus limiting your ability to make sales or service your customers to sustain your business.

Salesforce does offer some native help that makes it possible to visualize hierarchies within a single instance, but it’s severely limited. Creating hierarchical views of customer data that meet the needs of different Salesforce users can be difficult, intensely manual, and time-consuming. In addition, creating dynamic hierarchies is virtually impossible.

Informatica Cloud MDM offers users the opportunity to leverage many types of hierarchies to deliver a single, dynamic view of customer data in order to help you strengthen the relationships between various entities, increase visibility and follow a path to smoother selling.

About Informatica

Informatica Corporation (Nasdaq:INFA) is the world’s number one independent provider of data integration software. Organizations around the world rely on Informatica to realize their information potential and drive top business imperatives. Informatica Vibe, the industry’s first and only embeddable virtual data machine (VDM), powers the unique “Map Once. Deploy Anywhere.” capabilities of the Informatica Platform. Worldwide, over 5,000 enterprises depend on Informatica to fully leverage their information assets from devices to mobile to social to big data residing on-premise, in the Cloud and across social networks.