



Duplicate Detection & Enhancement Process

- Reduce record storage costs in Marketing Automation + CRM
- Eliminate duplicates caused by multiple data entry sources
- Ensure data updates are accessed in one, correct record
- Remove sales conflict over incorrect lead assignments

STEP
01

AGILE RECEIVES CLIENT FILE

Customer provides a csv. file of contact and account records and sends to Agile. The file includes lead, contact, and account records with standard data fields for matching and completion.



STEP
02

A MATCH IS RUN

The data services team runs the match between client data and the Agile Education Marketing database. The first step is an automated match followed by manual review of exceptions.



STEP
03

DUPLICATE RECORDS ID'D

Matching and prioritizing records is based on account master record rules defined by customer. Accounts, contacts, and leads are flagged and the match results report is reviewed.



STEP
04

ONGOING HYGIENE PROCESS

Working with the Agile Data Services team, the clean data file can be loaded into the customer's MA + CRM systems. Agile will also recommend a set of data hygiene rules to reduce future creation of bad data.

