X2CRM

De-Duplication Project

CASE STUDY

Background

A multi-national commercial real estate brokerage conglomerate, founded in 1979, is currently one of the leading brokers in the franchise arena of commercial real estate. The company is a global network of brokers offering turnkey solutions to clients. The company switched its previous CRM system to X2CRM for its ease-of-use, available custom configurations and lower overall cost.

Challenges

Prior to the migration to its current X2CRM system, the company was using database information from a legacy Salesforce.com database that had been in place for six years. This database contained numerous duplicate records within the 250K records.

The duplications were created by data management rules that did not allow other agents to see or confirm the existence of contacts that may have been created by other agents. Multiple agents would create the same record — up to 14 duplicates for a single buyer. As a result, up to 90,000 records were identified as duplicates.

PROBLEM 1

These duplicates caused confusion for both the company as well as the buyers/customers. For instance, automated marketing campaigns would launch and send to each record, resulting in the same email sent to the same buyer, from different agents. This confused the client, as well as lowering the company's credibility and trust.

PROBLEM 2

Agents wanted to be able to have their own version of information attached to contacts, for example, notes, emails, signed documents and so on. They also did not want other agents to have the ability to access private information about the contact.

The company decided that it wanted a system that would allow one agent to be designated as the "owner", while agents had shared access on a view-only basis.

Solution

The development team at X2 Engine designed a "de-duplication" process to clean up the existing data, along with rewriting data management rules and permissions due to the company's business process requirements that required detailed and elaborate rules.

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The X2-designed process went through all contact database records and identified contacts with the same email address. The most recent agent with the contact would become the new single owner of that record.

The script then merged all other duplicate records into to the new single contact record, along with all the correct owner fields and other information.

Result

After the completion of this de-duplication process, all agents who had shared access permissions to the single contact record could view the attached records (notes, emails, docs), while not being able to see attached records for other agents.

After the initial merge, any new buyer contact records created are first checked automatically by X2CRM to ensure it is not a duplication. If it is a "duplicate", the X2 system then grants the agent "shared" access to view the existing contact record, with that agent also being designated as a "shared owner" of that record.

If a shared owner of the contact record wished to become the "single owner", there is an available process to request that status through the admin of X2CRM.

Benefits

- New contacts are now properly vetted and screened for duplication, eliminating any possible future duplication issues.
- Increased buyer confidence, reduced confusion.
- Agent trust is improved, along with a higher rate of CRM usage.

Project Recap

The company considered the project a fundamental restructuring of its database and data security management. After project completion, the company said the X2CRM deployment was "flawless".

> "Good job guys, it came up flawlessly!"
> — email from a project manager at the company.

The X2 engineering team began the project at 6 p.m. on a Friday night with completion achieved on the following Monday at 6 a.m. X2's de-duplication process was implemented over a weekend to reduce impacts on the sales staff.

Says David Buchanan, X2 Engine CEO, "Our development team really rose to the occasion. They have certainly upped their game over the last few months."

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