Managing Duplicates: Managing Duplicates

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DESTINATION EXCELLENCE
PRESENTERS
University of Oregon

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CAMPUS PROFILE
University of Oregon

- Founded: 1876
- Location: Eugene, Oregon
- Campus: 9 schools and colleges
  - 295-acre main campus
  - Urban campus in Portland
  - Oregon Coast campus (Marine Biology)
- Total Enrollment: 24,181
  - 20,569 (Undergraduate)
  - 3,612 (Graduate)
TALISMA BACKGROUND
University of Oregon

• Implemented in June 2013
• SIS: Banner by Ellucian
• Talisma 8.6 — Higher Ed. Pack — Hotfix 16
• 198 Talisma Users
  – Division of Enrollment Management
  – Office of Admissions
  – Office of Student Financial Aid and Scholarships
  – Office of Student Orientation
  – Office of the Registrar
CORE TEAM: KEY STAKEHOLDERS

University of Oregon

• Admissions
  – Director of Admissions
  – Associate Director
  – Assistant Director

• Financial Aid
  – Assistant Director

• Registrar
  – Associate Registrar
  – Assistant Registrar

• Student Orientation
  – Director
  – Assistant Director

• Strategic Communications
  – Director
  – Assistant Director
  – Campaign Manager
  – iServices and Web Manager

• Information Services
  – Banner SIS Administrator
  – CRM Systems Integrator
DUPLICATE LEADS
DUCK—DUCK—DUCK—DUCK—DUCK—DUCK—GOOSE?
DUPLICATE LEADS

It’s all about reining them in
WHERE DO OUR LEADS COME FROM?
Everyday new Ducks hatch. Sometimes they look very similar.

• Number of Leads: 1.5 million leads

• Data Sources:
  – iServices (10-20 active web forms at any given time)
  – SIS imports (2K to 60K nightly updates and new imports)
  – Periodic data imports (CollegeBoard, ACT, TOEFL, NACAC Fairs, etc.)
  – Manual entry, incoming e-mails, phone calls, visits
CHALLENGES
Sometimes it takes a few falls out of the nest before Ducks can fly

- Being new to the system
- Awareness of issues
- Inability to accurately assess total duplicates in system
- Whack-a-Mole mentality for the first few months
- Slow and cumbersome duplicate resolution tool
- No systems put in place
WHY SHOULD WE RESOLVE DUPLICATES?

“CRM leaders who avoid master data management (MDM) will derive erroneous results that annoy customers, resulting in a 25-percent reduction in potential revenue gains.”

— Gartner, Inc. (Feb. 2014)
ASSESSING THE DAMAGE
From ugly duckling to a better looking duck

DON’T BE BLIND TO HOW YOUR DUPLICATES ARE CREATED.
ASSESSING THE DAMAGE

- Creation of the TaDa (Talisma Data) team
- Added additional duplicate check layers on SIS and iServices imports
- Initialized global configuration for manual data entry on e-mail addresses
- Creation of the Flag Tab
ASSESSING THE DAMAGE
TaDa: Where the TalisMAGIC Happens

TaDa! THE _TALISMA_ DATA GROUP

• CRM Campaign Managers
• iServices and Web Manager
• Data Import Manager
• Systems Integrity Manager
• Technical Systems Integrator
ASSESSING THE DAMAGE

The Flag Tab

• Flags a lead by the date of entry into the system and from which source, allowing user to adjust that source to prevent future duplicates
ASSESSING THE DAMAGE

Duplicates by Source: FLDET
ASSESSING THE DAMAGE

Duplicates by Fall Term
ASSESSING THE DAMAGE

Top 10 Stage Pairs By Fall Term
ASSESSING THE DAMAGE

Top 10 Stage Pairs for Fall 2015
WHERE WE STARTED AND WHERE WE’RE AT

LEGEND: Duplicates Matched By Each Group. Groups sorted from most effective to least effective.

• **FLDET**: First Name, Last Name, Date of Birth, Email, Entry Term
• **FLET**: First Name, Last Name, Email, Entry Term
• **FLS1T**: First Name, Last Name, Mailing Street 1 (Exact Match), Entry Term
• **FLDSZT**: First Name, Last Name, Date of Birth, State, Zip (First 5 Digits), Entry Term
• **FLDT**: First Name, Last Name, Date of Birth, Entry Term
• **FLSZT**: First Name, Last Name, State, Zip (First 5 Digits), Entry Term
## WHERE WE STARTED AND WHERE WE’RE AT

### Duplicate Leads April 2014

<table>
<thead>
<tr>
<th>Duplicate Group</th>
<th>Total Possible</th>
<th>Total Contactable Leads</th>
<th>Total System Leads</th>
<th>Percentage of Contactable Total</th>
<th>Percentage of System Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLDET</td>
<td>10,192</td>
<td>346,318</td>
<td>878,803</td>
<td>2.94%</td>
<td>1.15%</td>
</tr>
<tr>
<td>FLET</td>
<td>13,970</td>
<td>346,318</td>
<td>878,803</td>
<td>4.03%</td>
<td>1.58%</td>
</tr>
<tr>
<td>FLS1T</td>
<td>27,699</td>
<td>346,318</td>
<td>878,803</td>
<td>7.99%</td>
<td>3.15%</td>
</tr>
<tr>
<td>FLDSZT</td>
<td>9,589</td>
<td>346,318</td>
<td>878,803</td>
<td>2.76%</td>
<td>1.09%</td>
</tr>
<tr>
<td>FLDT</td>
<td>16,530</td>
<td>346,318</td>
<td>878,803</td>
<td>4.77%</td>
<td>1.88%</td>
</tr>
<tr>
<td>FLSZT</td>
<td>11,542</td>
<td>346,318</td>
<td>878,803</td>
<td>3.33%</td>
<td>1.31%</td>
</tr>
</tbody>
</table>
# WHERE WE STARTED AND WHERE WE’RE AT

## Duplicate Leads April 2015

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<th>Total System Leads</th>
<th>Percentage of Contactable Total</th>
<th>Percentage of System Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLDET</td>
<td>1,743</td>
<td>405,202</td>
<td>1,135,773</td>
<td>0.43%</td>
<td>0.15%</td>
</tr>
<tr>
<td>FLET</td>
<td>2,799</td>
<td>405,202</td>
<td>1,135,773</td>
<td>0.69%</td>
<td>0.24%</td>
</tr>
<tr>
<td>FLS1T</td>
<td>5,040</td>
<td>405,202</td>
<td>1,135,773</td>
<td>1.24%</td>
<td>0.44%</td>
</tr>
<tr>
<td>FLDSZT</td>
<td>5,239</td>
<td>405,202</td>
<td>1,135,773</td>
<td>1.29%</td>
<td>0.46%</td>
</tr>
<tr>
<td>FLDT</td>
<td>7,089</td>
<td>405,202</td>
<td>1,135,773</td>
<td>1.74%</td>
<td>0.62%</td>
</tr>
<tr>
<td>FLSZT</td>
<td>3,688</td>
<td>405,202</td>
<td>1,135,773</td>
<td>0.91%</td>
<td>0.32%</td>
</tr>
</tbody>
</table>
FIXING THE DAMAGE

• Created tighter duplicate layer set-up for iServices and SIS
• Trained front-line staff how to merge leads when a duplicate is recognized
• Create daily reports of known duplicates in the system
• Assigned several positions to focus on duplicate merging
• Created a duplicate merging workspace
MOVING FORWARD
UO Custom Bulk Merge Script

Population Selection
Duplicate Report

Review
Custom Dates
Custom Communication Properties
Stage

System Merge
All Other Properties
All Other Dates
Sub Stage
MOVING FORWARD
UO Custom Bulk Merge Script

Bulk Merge Rates Over 90 Minutes
By Term

- Fall 2016
- Fall 2015
- Fall 2014

Time in Minutes:
- Baseline
- 10
- 20
- 30
- 90
MOVING FORWARD
UO Custom Bulk Merge Script

• Dynamic Property Selection
• Extensible
• System Merge Procedures
MOVING FORWARD
UO Generic Bulk Merge Script

Review

Population Selection
Duplicate Report

Update All Properties

System Merge
WIN THE DAY!
CONTACT INFORMATION
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