

dun & bradstreet  
SALES & MARKETING

FOR SALESFORCE®

# D&B Optimizer

Empower Your Organization With Accurate, Actionable Data in Salesforce

## DIRECT ACCESS TO QUALITY DATA

Keeping data up to date is an ongoing challenge for sales and marketing teams. In fact, Salesforce.com estimates that 91 percent of CRM data is incomplete and 70 percent of that data decays annually. Powered by the Dun & Bradstreet Data Cloud, D&B Optimizer can help you increase sales, improve campaign performance, and reduce the cost associated with bad data.

## HOW IT WORKS

D&B Optimizer continuously manages data quality within your Salesforce environment so you don't have to. It enables your organization to have confidence in segmenting the market, identifying priority targets, and ensuring alignment across your business. By automatically enriching account and lead records, D&B Optimizer provides direct access to real-time, quality data so you can:

- Identify cross-sell and upsell opportunities with visibility into corporate linkage and family trees
- Accelerate growth by prioritizing accounts based on 80+ fields of advanced information
- Increase sales productivity by eliminating manual data entry efforts
- Visualize key business segments with robust dashboards to drive better market analysis
- Define rules to flexibly ingest data based on DUNSRight matching or compare side by side



### Ensure Continuous Data Hygiene

Maintain a single source of data truth and increase alignment and efficiency within your Salesforce instance



### Enrich Data in Real Time

Ensure all records contain accurate core business firmographics, intelligence, and hierarchical relationships



### Improve Analysis and Visualization

Dynamic dashboards help you analyze accounts by revenue, industry, employee size, and geographic location



D&B Optimizer has done wonders for us. Not only has this app cleaned and enriched our account records, it has also helped us manage duplicates and establish account hierarchies.

— James Lines, Digital Media Specialist, Multisorb

## MANAGE IDENTITY WITH THE DUN & BRADSTREET DATA CLOUD

D&B Optimizer for Salesforce provides access to the Dun & Bradstreet Data Cloud, comprising over 300 million global business records, curated from tens of thousands of sources and updated 5 million times a day. With this data and dynamic dashboards, you'll be empowered to:

### Prevent Duplicates from the Onset

Search against your instance and the Dun & Bradstreet Data Cloud to receive match candidates and prevent duplicate creation - all within your Salesforce instance

### Understand Your Data Health

Obtain a quick overview of your data health via dynamic stewardship dashboards.

### Find New Opportunities

Establish corporate linkages to reveal cross-sell and upsell opportunities for your sellers.

### Identify Duplicates

Leverage the power of the Dun & Bradstreet D-U-N-S® Number to flag redundant records.

### Flag Out-of-Business Records

Stay informed of businesses that are no longer active based on proprietary indicators.

The screenshot shows the 'D&B Optimizer Matching Records (100)' interface. It includes a search bar on the left with filters for Business Name, D-U-N-S Number, Company URL, Street Address, City, State/Province, Country, and Phone Number. The main area displays a table of matching records with columns for Business Name, D-U-N-S, Company URL, Primary Address, Industry, Employees, Sales USD, Marketable, and Location Type. Several records are listed, including 'The Dun & Bradstreet Corporation' and 'DUN & BRADSTREET LIMITED'.

The screenshot shows the 'Data Stewardship Dashboards' interface. It features a donut chart indicating 3,928 Duplicate Records, with 97.9% being Unique Records and 2.1% being Duplicate Records. Below the chart is a table titled 'Duplicate Records' with columns for DUNS, Account Name, Primary Address, #Duplicates, #Opps, #Activities, #Contacts, and Action. Three records are listed, including 'Newstead Nursing Home' and 'LABORATORIO DI ANALISI L. PASTEUR SRL'.

## AUTOMATE DATA MANAGEMENT DIRECTLY IN SALESFORCE

Duplicate accounts cause confusion and waste time for CRM users. They are often created by mistake or when multiple CRM instances are combined. D&B Optimizer helps you to consolidate duplicate accounts with ease.

### Unlimited Dupe Selection

Select as many duplicates that exist for an entity in Salesforce.

### Merge Duplicates

Select a master record to inherit all related objects contained within duplicates.

### Eliminate Bad Data

Obtain a unified view of key prospects and customers for improved targeting and enhanced productivity.

Select which records to merge. The master record will retain its values and inherit all related objects from other records involved in the merge. The first row of shaded data represents D&B's information for the DUNS Number, to help guide your selection of a master record.

Master?	Include?	Account Name	Address	#Opps	#Activities	#Contacts	Created	Last Modified
		The Dun & Bradstreet Corporation	103 John F Kennedy Pkwy, Short Hills, New Jersey, 07078-2708, US					
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	The Dun & Bradstreet Corporation	103 John F Kennedy Parkway, NJ, 07078, United States	4	0	10	11/26/2018	10/10/2019
<input type="radio"/>	<input type="checkbox"/>	The Dun & Bradstreet Corporation	Short Hills, NJ, US	0	0	0	10/31/2019	10/31/2019
<input type="radio"/>	<input type="checkbox"/>	The Dun & Bradstreet Corporation	Short Hills, NJ, US	0	0	0	10/31/2019	10/31/2019
<input type="radio"/>	<input type="checkbox"/>	The Dun & Bradstreet Corporation	Short Hills, NJ, US	0	0	0	10/31/2019	10/31/2019
<input type="radio"/>	<input type="checkbox"/>	The Dun & Bradstreet Corporation	JFK Parkway, Short Hills, NJ, US	0	0	0	10/31/2019	10/31/2019

Cancel Merge

## THE PREFERRED PATH FOR DATA.COM CUSTOMERS

As the sole commercial data provider powering Data.com, Dun & Bradstreet continues to partner with Salesforce via the AppExchange and Lightning Data to offer powerful replacements for both Clean and Prospector. We've highlighted D&B Optimizer for Salesforce, the alternative to Data.com Clean, but we also want to introduce you to D&B Hoovers, the replacement for Data.com Prospector.

D&B Hoovers is an unparalleled sales intelligence solution that features world-class company and contact data, plus powerful new prospecting features. Our embedded QuickView Company Profiles turn your Salesforce instance into a more powerful B2B prospecting and account management resource, so your teams can focus on closing more deals instead of hunting for information. So whether you are new to Dun & Bradstreet and Data.com, or you're an existing customer, our solutions provide a smooth transition from Data.com while helping you to achieve your goals.

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## START DELIVERING WITH CONFIDENCE TODAY

D&B Optimizer for Salesforce delivers the clarity and consistency you need to drive your sales and marketing initiatives forward with confidence. It strives to deliver matches across those records that are most valuable to your business and provide a single source of data truth that increases alignment and efficiency within your Salesforce instance. Let D&B Optimizer for Salesforce help you realize the power of your data.



Request your  
**FREE TRIAL TODAY**  
[dnb.com/optsalesforce-free-trial](https://dnb.com/optsalesforce-free-trial)

### ABOUT DUN & BRADSTREET®

Dun & Bradstreet, the global leader in commercial data and analytics, enables companies around the world to improve their business performance. Dun & Bradstreet's Data Cloud fuels solutions and delivers insights that empower customers to accelerate revenue, lower cost, mitigate risk, and transform their businesses. Since 1841, companies of every size have relied on Dun & Bradstreet to help them manage risk and reveal opportunity. Twitter: [@DunBradstreet](https://twitter.com/DunBradstreet)