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Email-to-CRM Contact Connection Easier Said Than Done

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What could be more basic than making your contact lists, mailing lists and address books all work together? Every CRM system takes care of as many of the basics as it can, and the simple act of importing contact lists is a snap.

However, an import is just the starting point, and there will still be silos of contact information scattered across the enterprise. CRM *lead* records are typically not synchronized with other back-office enterprise systems (after all, leads have no real business relationship yet).

How-To: Tracking Leads, Contact, People and Accounts in a CRM System

You want to synchronize CRM lead records with marketing automation systems, forums, discussion groups and other customer-facing registration databases. When it comes to back-end systems, synchronizing CRM contact records is enabled by integration connectors, foreign keys and duplicate detection logic.

Synchronizing CRM Contacts a Dedupe Nightmare

"Enabled," it should be pointed out, means "you can," not "you'll like it." This aspect of the contact problem can be solved—as long as your integration team deals with the following deduplication nuances:

- Case insensitivity.
- Typos and abbreviations.
- Accented characters. For dupe detection, you probably should consider é the same as e.
- Misspellings, name substitutes and people's nicknames, such as Scott, Scotty and Scooter.
- So-called "street names" (Disney instead of The Walt Disney Company) and divisions (Pixar instead of Disney) for a Contact's employer.
- Converting a CRM lead record to a contact if there's already a match with one of the outside contacts.
- Multiplying (roughly) 10 email addresses, eight phone numbers and five mailing addresses per contact. Of course, each of these should be a related record off the main contact, but you have to accommodate systems that don't support that natively.
- Accounting for country and state variations. As I wrote previously, you really want ISO codes, but many systems' data won't have them.
- Merging multiple avatars for the same individual. Some systems won't easily support merges, so you have to have a strategy for this.
- Finally, applying adaptive or fuzzy scoring for duplicate candidates. For example, if you've matched an unusual name such as Flash qFiasco, it's probably a dupe, even if the addresses are in different states.

Now That the Simple Stuff Is Done…

The bulk of an enterprise's contact information is in everyone's email client address book. Most of those address books can be totally ignored for synchronization with the CRM. That said, address books of executives, sales people and customer support people are likely to be valuable.

There are two main use-cases for email and CRM Contact synching. First, there's aggregating everyone in the client and prospect world. This level-0 social network is useful in both prospecting and cultivating customer relationships. In this case, the value is in collecting and centralizing information from users' address books.

Tip: Avoid 3 Key CRM User Identity Mistakes

Second, there's distributing the latest contact information to anyone who needs to use it. If we find out that Joe Bigshot at Widgets Inc. has a new mobile phone number, then that new number should show up in everyone's address book.

Unfortunately, several things get in the way of these useful use cases.

- People tend to think of their address book as their personal property. Even though in most U.S. jurisdictions the address book is the company's property, that's not how users will feel.
- To that end, most people manage their address book as their private silo, so they're not used to the consequences of having it become a shared, replicated data store. Consequently, users must be indoctrinated—not just trained—about how to avoid corrupting records in their own address books now that they are shared resources.
- Contact replication is hard, particularly when it involves multi-master, two-way synchronization. It's not that this is an insoluble problem, but there are a surprising number of error conditions to handle.
- Contact replication products abound. Apple, for example, offers contact sync via iTunes, MobileMe, Exchange and iCloud, and then there are the third-party products. Each one seems to have its own set of bugs. The more different synching strategies you use—plug-ins to Outlook, add-ons for Exchange, services for smartphones, products for the cloud, etc.—the more charming the variety of bugs and corruptions to be discovered. This is not idle talk. I've personally burned about 20 hours over the last month on a single replication corruption problem.
- There are at least a few products that do an outstanding job with address book synchronization to the core CRM. Know that doing it right involves using intermediate replicates, which can consume system resources on every user's PC. More importantly, these products require a surprising amount of administrative overhead, and the data steward activities involved with change propagation and reconciliation seem to rise exponentially with heavy usage.

This Looks Like a Job for the KISS Principle

These are the three email and CRM contact replication guidelines we use with our clients:

1. If possible, use just one-way replication of users' address books.
2. Identify the single existing address book that is likely to give you the best coverage for your client base. For large organizations, use a federated model with a single address book for each relevant "territory." This may be geographic, or it may be separated by industry or function. Once you've identified that master set of address books, remove irrelevant contacts, cleanse/normalize the data, and dedupe it before import to the CRM. When you do the import, make sure each contact record has an explicit indicator of which address book it came from.
3. Have a unified point of control for updating the centralized records over time. In small organizations, these updates may just be applied manually on an ad-hoc basis. In large organizations, you'll need to follow a monthly or quarterly update cycle with programmatic field-level arbitration of updates.

The value of synchronizing contacts is intuitively obvious. I just wish there were a silver bullet.

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