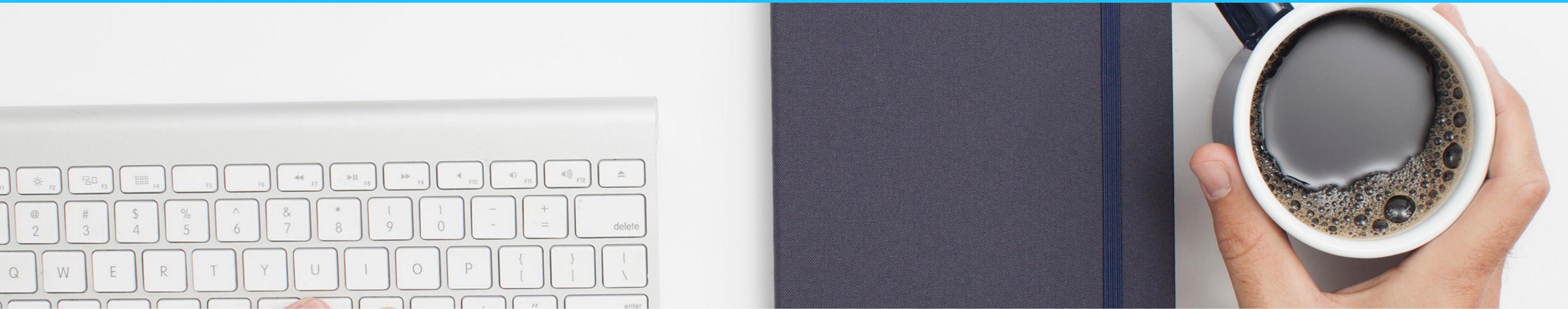




THE SCIENCE OF CRM SEARCHING

LEARN WHY YOUR SEARCH MAY BE FAILING YOU

Search is the most used feature in CRMs.



When a CRM does not live up to expectations this reduces its value. It impedes productivity, efficiency, and adoption. So, the question is, how's your search working for you?

The truth is that most basic searching mechanisms in CRMs is not as robust as you'd like. It may take too long to find what you need if you aren't specific enough. Or, it could not be pulling back probable results because of misspellings or other character errors.

It's time to uncover the science behind search and why you need outside tools to get a search that satisfies all your requirements and needs.

Different Kinds of Search



Not every search is created equal. Depending on where you are in the CRM, you could get different results. That's inconvenient and unreliable.

- Global search: full system search that often returns lots of irrelevant data because results aren't configured to display otherwise.
- Local search: searching a very specific area like accounts or contacts.
- Associate search: seeking to find contacts associated with a company.
- Conversion search: finding current records to convert to avoid duplication

Is Your CRM Failing Your Employees?



If your CRM technology doesn't work or have the appropriate functionality, your employees won't use it. Not having the right search capabilities may be impeding full adoption.

Your employees don't come to work to "buck the system." So, if there if they aren't using your CRM, then it's time to find out why.

Why do CRM searches fall short?



There are several reasons CRM searches fall short. These pain points are real for users, who deal with these challenges every day. First, search is often slow. It shouldn't take more than a few milliseconds to perform your search. Second, there is a reliability factor. Is the search really returning all possibilities? Is every entry indexed?

Third, there is a consistency issue. Depending on where within the CRM you search, you will get different results. Finally, efficiency is compromised because of the layout of results. If these aren't configured in a way that meets your goals, deciphering what's most relevant wastes a lot of time.

What is fuzzy search?

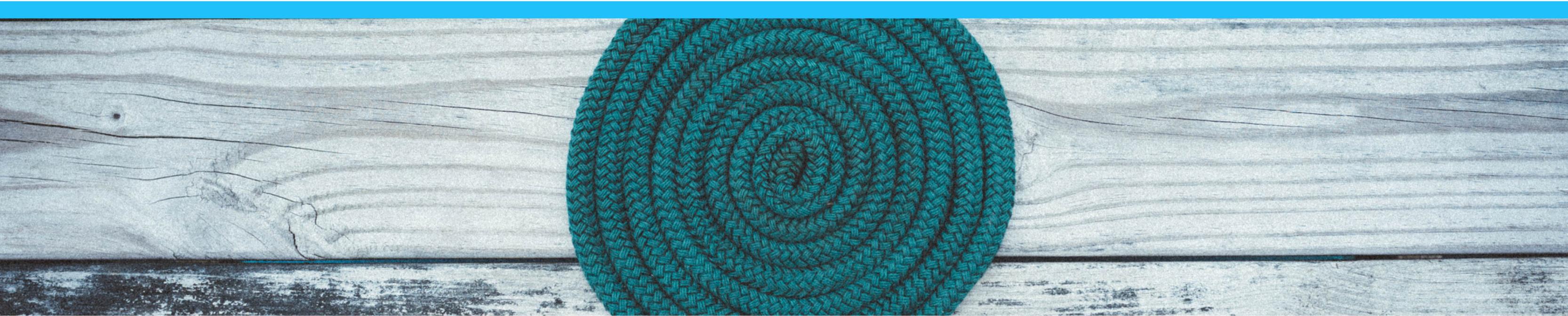


Simply said, fuzzy search means you don't have to be exact to receive results. Fuzzy search is a collection of algorithms that expand search from verbatim results. These algorithms take into account misspellings, nicknames, abbreviations, phonetic variations, and special characters.

For example, searching for William Smith could also return Bill Smyth. When you don't have to be specific, searching is smarter. Without fuzzy search, it's hard to confirm that the results are consistent or reliable.

There are several different fuzzy search algorithms. We'll explore those next.

Approximate or Fuzzy String Matching



To understand fuzzy search algorithms, you'll also want to know about approximate or fuzzy string matching. It's the technique of finding "strings" that match a pattern approximately rather than exactly. The closeness of the match is a number called the edit distance between the string and the pattern sought. The match could be insertion (Bobbi to Bobbie), deletion (Bobbie to Bobbi), or substitution (Bobby to Bobbi). Sometimes transposition is part of the matching as well.

Different approximate matchers have different constraints, which means there could be multiple insertions, deletions, substitutions, or transpositions.

Types of Fuzzy Search Algorithms



- **Edit distance:** measures the distance between two strings by the number of edits it takes to change one string into another. (e.g. Jaro-Winkler)
- **Phonetic:** words with different spellings may sound the same, like Smith and Smyth
- **Substring:** small chunks of strings used for indexing purposes as well as for ranking of results. (e.g. Ngram)
- **Domain Knowledge:** deploy domain specific knowledge and lookup tables to improve results. (e.g. United Kingdom and Great Britain)
- **Standardization:** standardizing or normalizing data. (converting screens to lower case and removing non-alpha, numeric data)
- **Heuristic:** rules coded for special considerations. (e.g. removing the leading zeroes from a string then matching them)



ATTRIBUTES OF AN EFFECTIVE CRM SEARCH

Consistent: receive the same results no matter where in the CRM you search

Smart: returns likely results with fuzzy considerations

Relevant: capabilities to search by certain criteria with most likely results displayed first

Thorough: search is exhaustive and looks at all possible data

Fast: get results in milliseconds

Reliable: all possible results are displayed

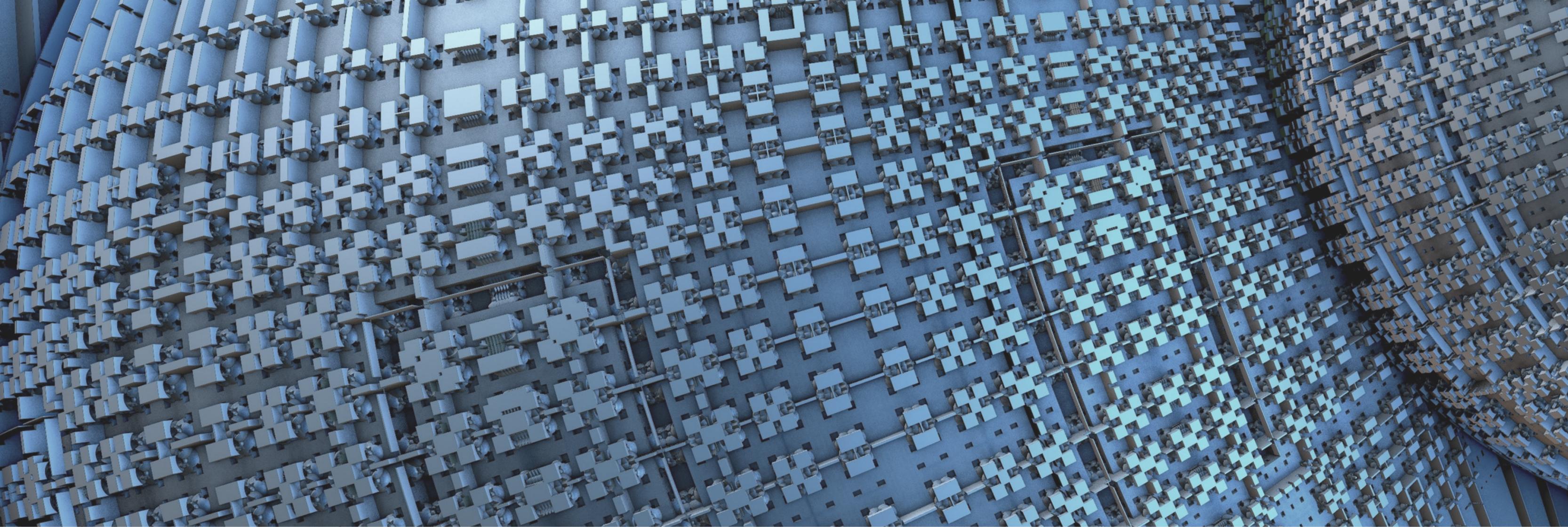


HOW TO IMPROVE YOUR SEARCH

You may be thinking that the only way to improve your search is with an integration tool. That's an option. But it will be time-intensive and expensive.

The alternative is to find tools that work within the CRM. This is more cost-effective and infinitely more efficient. Think of how much time and trouble this could save your team and improve adoption rates.

The science of CRM searching is built on on having an agile engine to power search beyond your current limitations. Remove these barriers today by learning more about ActivePrime CRM search solutions.



This ebook was created by ActivePrime to educate CRM users about search. As a leader in customer data quality and governance, we offer ways to search and manage all your data, on four CRMs. Experience better CRM performance and adoption with smarter searching and cleaner data.

ACTIVEPRIME.COM

SALES@ACTIVEPRIME.COM

617-247-9908

