



Decide with Confidence

Purisma Solutions from D&B: Delivering Insight Across Your Enterprise

The Need for Business Insight

Business is fast, global, and often heavily regulated. Every day, there are millions of changes in customers, partners, and competitors, all in the context of strict compliance requirements. To be successful, you need business insight that keeps you aware of these changes and you need the tools to take action on that insight.

You need to *transform* and integrate your data to provide a new level of actionable insight with a solution that can be deployed quickly and kept simple, so that business groups can manage their master data without excessively burdening IT.

“We spent a lot of time and money just organizing our top 30 accounts, and that was a one-time effort. We knew we could not justify the cost of ongoing maintenance using the same approach. We had to find a better way of gaining insight into our customer base.”

—Peter Van Ooy
Managing Director
Cushman Corp/Inc

A Trusted Partner for Mastering Your Data

From a single trusted provider—Dun & Bradstreet (D&B) powered by Purisma Solutions technology—come solutions combining reference data, data hub technology, analytics, and applications to deliver new levels of insight across your enterprise. With more than 165 years of experience delivering business insight, D&B is trusted by over 60,000 companies worldwide, including 95% of the BusinessWeek Global 1000.

You can trust D&B for the insight for more profitable decisions, whether you are:

- A marketing manager identifying targets for cross-sell campaigns based on relationship profiles
- A sales person performing account planning based on corporate organizational structures
- A credit analyst assessing risk based on exposure profiles

Innovative MDM Technology

The *D&B Purisma Data Hub™* product combines your internal data with D&B's leading commercial insight in a dynamic master data repository, adding external context to better understand customers and markets. Our innovative master data management (MDM) software helps you realize more business value because it is quick to deploy and easy to personalize, and it ensures that your information is accurate and constantly updated.

“We needed a solution that could be deployed quickly, that could be easily tailored to meet the needs of different business groups, that had strong data stewardship and governance capabilities, and that did not require hours of work every time we had to make a change. Purisma technology was the only solution that could meet all our requirements.”

—Douglas E. LaVelle
Director, Business Relationship Management
Corporate Express

The Benefits of Using Purisma Solutions

Customize Corporate Definitions

Business users can easily modify the standard D&B corporate hierarchy, or define custom hierarchies from the ground up. For example, you may want to treat a subsidiary as an independent corporation, combine multiple Global Ultimates into an overarching corporate entity known as a Corporate Ultimate™, or add independent franchises into their parent franchisor. With Purisma solutions, you can align organizational structures to match the way they view and interact with their customers.

Create Multiple Views of a Corporation

As you create customized corporate definitions, you can create multiple, automatically maintained views for different business users. Create a sales view based on territories, a marketing view based on industry segmentation, or a financial view based on legal structure.

Create as many views as you need. You can also create snapshots of any hierarchy, freezing a specific view in time or manually modifying the snapshot to limit/control how changes flow in.

Preserve Hierarchy Customizations

Customizations or data modifications that would have been overwritten when data was refreshed are preserved. This enables you to frequently refresh D&B information without the threat of over-writing custom hierarchies.

Increase Identity Resolution

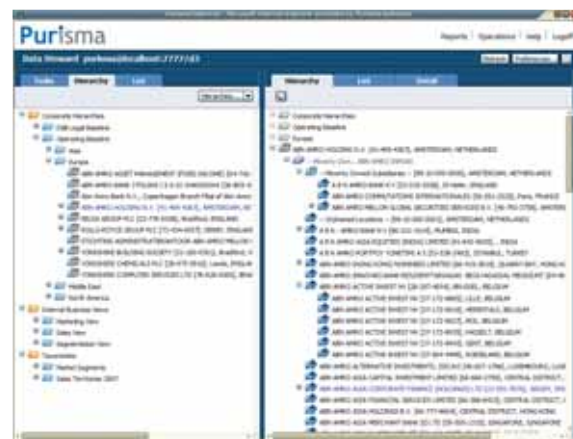
Purisma Solutions technology augments D&B's matching, especially for local language data in international/emerging markets and for customers who need to match custom fields. The *Purisma Data Hub* tracks the actions of data stewards and learns from those actions. The MDM software even learns from reference data sources. The result is not only the highest degree of initial match accuracy but also continuously improved accuracy thereafter.

Point-and-Click Data Stewardship

Purisma Solutions provide an easy-to-use data stewardship application that empowers users to resolve data exceptions using a graphical “point-and-click” solution rather than manual, spreadsheet-based methods often used. Re-assign D-U-N-S® Numbers and modify corporate attributes, and the solution will automatically identify customer records you may want to review.

Team-Based Data Governance

Accountability and management of various aspects of master data—including accuracy, accessibility, consistency, completeness, and updating—can be delegated across data governance teams, using a central location from which all MDM decisions and



issues can be documented and tracked. A workflow approval process ensures that only approved changes take effect and that team members are not performing redundant work.

Seamless File Exchange and Integration

Purisma Solutions can be configured-to-order to match your D&B profiles and data sources. Out-of-the-box workflows are easily configured and scheduled to manage the overall exchange and enrichment process with D&B. Internal data as well as D&B reference files can be easily imported into the *Purisma Data Hub*, without modification.

Meeting Challenges with Proven Business Value

Widespread adoption of MDM technology has been hampered by real and perceived MDM challenges. However, Purisma Solutions from D&B have been successful in helping global corporations solve critical business problems by meeting those challenges. Here are some real-world examples.

Complex and expensive infrastructure projects that require a one-size-fits-all enterprise approach

A global provider of healthcare products and services had been driving growth through mergers and acquisitions (M&A) and planned to continue M&A activity across six continents. Sales and marketing needed complete customer and market insight to improve account planning, but could not wait 3–5 years for IT to integrate and consolidate disparate systems. In just weeks, Purisma helped them analyze buying behavior by customer type, product categories, and sales volume by matching internal data across systems with assignment of D&B D-U-N-S Numbers.

Business groups that cannot view and organize customer hierarchies in a way that fits their business needs

One of the world's largest freight carriers was having difficulty correctly calculating rates for sales contracts. The only customer view it had was the one finance used for credit checks, which did not show aggregate volume across regional shipping divisions. Purisma Solutions made its information actionable using the unique role-based hierarchy system to create a customer view by order and contract history for sales, one by region and season for marketing, and one

by credit risk for finance. These customized views are automatically updated as data flows in from regional freight management systems.

Inefficient or insufficient use of D&B reference data and other industry-specific reference data sources in areas such as healthcare, finance, and logistics

A leading provider of business performance management software wanted to create more effective marketing strategies and competitive sales positioning by enriching internal customer data with D&B data and indexing customer records with Forbes Global 2000 and Global 500 lists. Purisma Solutions helped transform its data to better understand the often convoluted relationships among customers, their parent companies, and their subsidiaries, and give sales a view of all opportunities, activities, orders, and contracts at every location within the corporate family tree.

Low match rates, particularly in environments where records are integrated from many different data sources with varying degrees of data quality and consistency

A large retail bank wanted to improve customer service by matching customers' records across deposit, loan, retirement, and credit card systems. Purisma Solutions helped it succeed by assigning D&B D-U-N-S Numbers for business identification and adding a continuous learning engine for custom business/matching rules. With our unique blended match scoring, the bank was better able to deal with alternative spellings, abbreviations, name changes, and data-entry mistakes such as doing-business-as/trade names and incorrectly used fields.

Not easy to correct errors or “clean up” source systems by writing back validated values and newly discovered attributes

A retail marketing team found that updates to opt in/out flags were not synchronized across marketing, sales, and support systems, resulting in frequent customer complaints. Purisma helped it centrally manage customer contact and privacy preferences and ensure consistency across all corporate systems without having to wait for IT to standardize on an enterprise data model and re-engineer transactional systems. The marketing team can keep it simple so that changes are published via java message service (JMS) to an enterprise service bus (ESB), which then manages the downstream activity of updating transactional systems.



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Require IT to assume all the responsibility for managing master data

A leading insurance company wanted to implement a system that allowed IT to define overall security and governance policies, but put the business groups who understood the context in which data was used in charge of the actual master data management. Purisma Solutions' market-leading data stewardship and governance capabilities helped it empower business groups to inspect, validate, and correct master records and hierarchy structures as needed.

Summary

Purisma Solutions are unique in the ability to help businesses be successful in today's faster, global, and more scrutinized environment. We are the only provider of complete business insight solutions that include reference data, MDM technology, analytics, and applications.

- **Transform Your Data**

Purisma Solutions ensure that you have the most accurate, complete, and continuously refreshed information to reach new prospects and grow existing customers. We maximize assignment of D-U-N-S Numbers to internal data and continuously integrate D&B's business information to establish business context. Our configurable multi-byte matching also accurately identifies business contacts and consumers as well as entities in emerging markets.

- **Deliver an Integrated View**

Enterprise data is constantly changing. Purisma Solutions manage the entire data lifecycle, continuously incorporating updated source data and providing a complete user interface to review changes. The *Purisma Data Hub* automates the data steward process while ensuring that data stewards have the tools and information they require to certify automated system decisions.

- **Make it Actionable**

From marketing and sales to finance to service, every business group needs a unique, but consistent, view of your prospects and customers. We empower business groups to create customized organizational hierarchies that exactly meet their needs and business rules and automatically maintain them to ensure ongoing relevance. Our easy-to-use data stewardship capabilities and data governance best practices lower costs and give you confidence that your insight can be trusted.

- **Complete Your Data**

Many IT groups are not prepared to devote significant resources to customizing customer MDM toolkits for a large infrastructure project. Our solutions give you everything you need out of the box, including a rich user interface, allowing you to launch with minimal IT effort in a fraction of the time. We also scale with your business, allowing you to handle broader and deeper enterprise integrations over time, strategically integrating data silos and disconnected business units.

To learn more about how you can get more value from your MDM investments, contact your D&B Relationship Manager, visit www.purisma.com, or e-mail info@purisma.com.

www.purisma.com