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OPENPRISE™

Data Orchestration for Marketing & Sales

SUMMARY: For companies with existing marketing systems of record, the Openprise Data Orchestration Platform automates and manages the process of ingesting 3rd party data, cleansing, de-duping data records and enriching internal customer data. As data is enriched, the system matches leads to accounts and unifies customer data to provide a comprehensive view of each prospect within and across marketing systems.

Highlighted functionality:

- With GDPR set to go into effect in May 2018, Openprise delivers a simple system to manage GDPR as a core feature of its data management platform.
- New lead scoring functionality enables marketing and sales teams to more accurately model the unique buying behavior of any company's prospects at every stage in the buyer's journey.

TO LEARN MORE:<https://www.openprisetech.com/#popmake-5934>

NOTE: All information in this report was provided to CabinetM in a vendor briefing, and reviewed by the vendor prior to publication. CabinetM briefings are done at no charge to the vendor. Our objective is to keep our user community informed about new sales and marketing products and features.

PRODUCT CATEGORY: DATA ORCHESTRATION

OVERVIEW

The Openprise Data Orchestration Platform automates and manages the process of ingesting 3rd party data from a wide variety of free and paid sources. Once ingested, the platform cleanses and de-dupes all data records and then uses this data to enrich internal customer data. As data is enriched, the system matches leads to accounts and unifies customer data to provide a comprehensive view of each prospect within and across marketing systems.

The screenshot displays the Openprise Data Orchestration Platform interface. At the top, there is a navigation bar with 'OPENPRISE' and menu items for 'Data', 'Rules', 'Analytics', and 'Administration'. A search bar and 'Admin Demo' link are also present. The main content area is titled 'Recipes' and contains a search bar for recipe names and tags. Below this, four recipe cards are shown, each with a 'CREATE PIPELINE FROM RECIPE' button:

- Marketo Activity Preparation For Account Based Analysis**: Tags: Marketo Lead Activity. Steps: 1. MKAcct01 - Append Lead & Company Details, 2. MKAcct02 - Clean Email, 3. MKAcct03 - Clean Website, 4. MKAcct04 - Extract Domain, 5. MKAcct05 - Clean Company.
- Marketo Lead Clean Recipe**: Cleanses Marketo lead records, including email, URL, address, title, and phone number. Includes de-duplication. Tags: Marketo Lead Clean. Steps: 1. MKClean01 - Clean Website, 2. MKClean02 - Clean Email, 3. MKClean03 - Extract Email Domain, 4. MKClean04 - Identify Personal Email, 5. MKClean05 - Name and Title Capitalization, 6. MKClean06 - Remove All Junk, 7. MKClean07 - Segment Job, 8. MKClean08 - Clean Company.
- Marketo Lead Segmentation Recipe**: This recipe helps segment leads by taking the title and industry attributes and segment them into Job Function, Job Role, and Industry Normalized. Tags: Marketo Lead Segment Segmentation Title Industry. Steps: 1. MKSeg01 - Job Title Segmentation, 2. MKSeg02 - Industry Mapping.
- Pardot Prospect Account Clean Recipe**: Cleanses Pardot Prospect Account records, including URL, account name, state, country, and phone number. Includes de-duplication by web domains and account name. Tags: Salesforce Pardot Prospect Account Account Clean. Steps: 1. PDAcctClean01 - Clean Website, 2. PDAcctClean02 - Extract Website Domains, 3. PDAcctClean03 - Clean Account Name, 4. PDAcctClean04 - Remove All Junk, 5. PDAcctClean05 - Infer City From Postal Code, 6. PDAcctClean06 - Infer State From Postal Code, 7. PDAcctClean07 - Carry Original State And City, 8. PDAcctClean09 - Normalize State.

At the bottom of the interface, there is a footer with 'Copyright Openprise 2014-2016', 'Privacy Policy | End User License Agreement', and 'Powered By OPENPRISE'.

Many Openprise customers also leverage the Openprise Data Marketplace to work with multiple 3rd party data providers simultaneously, while standardizing on their own set of values, since each third party data provider may have their own value taxonomy. To address the mismatch of information due to differing values, Openprise is able to derive critical fields like Job Function (e.g., Marketing, Sales, IT), Job Sub-Function (e.g., Demand Gen, PR, Product Marketing), and Job Level (e.g., Individual Contributor, Executive, Manager) all from Job Title using Openprise data. Openprise has a database of thousands of Job Title keywords and algorithms to rate the importance of each word in a Job Title. So for example, Openprise can see a title like "Assistant to the Vice President of Demand Gen" and automatically determine that the person is in Marketing and is an individual contributor. The advantage of this algorithmic approach over purchasing this data from a data provider is that the name doesn't need to be in a data provider's database, so a much higher percentage of leads can be enriched with this information.

All the heavy and intensive data processing is done within the Openprise platform, but the resulting records are maintained within the external marketing and sales automation systems that clients use as their systems of record to ensure that those systems run efficiently. One of the most compelling features of the Openprise platform is the ongoing "invisible" behind the scenes maintenance all of data within client systems of record, to ensure that accurate data is in the right place at the right time.

On November 7th, Openprise announced the addition of lead and account scoring functionality. This new functionality provides marketing and sales teams with the ability to more accurately model the unique buying behavior of any company's prospects at every stage in the buyer's journey. Some of the key features include the ability to:

- Score leads and accounts and match leads to accounts.
- Create scoring models for different business units, products, channels and geographies as well as unique models for new prospects and up-sell opportunities.
- Test multiple scoring models simultaneously and then standardize on the best one based on sales data.
- Re-score daily, based on activities during a given period.
- Jumpstart the scoring process by leveraging pre-built scoring recipe models built by Openprise, based on best practices in scoring millions of leads.

GDPR COMPLIANCE

In May 2018, new European General Data Protection Regulations (GDPR) come into effect governing how European consumer data is managed. These regulations impact any company selling in the EU or ingesting any European consumer data (accidental or not). To be fully compliant, companies will have to ensure that their entire data supply chain is GDPR-compliant. Compliance can be affirmed with the addition of a Data Processing Addendum (DPA) attached to the contract between a vendor and its customer that documents that the company will process personal data in accordance with GDPR requirements.

The challenge is that companies may be reluctant to sign a DPA or haven't yet begun to document or define a process for managing GDPR.

Openprise delivers a simple system to manage GDPR as a core feature of its data management platform. Using the platform, marketers can manage GDPR requirements for their 3rd party data supply chain by configuring rules and actions to keep a company from requesting data from 3rd parties about EU citizens. This will ensure that EU data is not sent to non-compliant vendors. Specifically the platform enables users to:

- Control the flow of EU data out of their company through data filters and permission-based roles ensuring that lead and contact data never gets unintentionally processed by 3rd party data providers.
- Identify leads and contacts that fall under GDPR, even if they are missing a valid country field value.
- Maintain detailed reporting on all data process activities inside Openprise and across 3rd parties.

The screenshot shows the 'GDPR Privacy Controls' configuration page in the Openprise platform. At the top, there is a navigation bar with 'OPENPRISE' and various menu items like 'Data', 'Automation', 'Analytics', 'Administration', and 'Admin Openprise'. The main content area is titled 'GDPR Privacy Controls' and features a toggle switch for 'GDPR controls enabled', which is currently turned on. Below this, there is a brief explanation of the controls and a section for selecting attributes to identify the country origin of a record. The attributes are grouped into three categories: 'Email and domain attributes' (with 'Email' and 'Domain' selected), 'Country attributes' (with 'Country' selected), and 'Phone number attributes' (with 'Phone' selected). There is also a section for logic to apply if the country origin cannot be determined, with 'Deny access to these records' selected. Finally, there is a field for 'This set of control applies to the following organizations' with 'US Marketing', 'APAC Marketing', and '3rd Party Vendors' selected. 'SAVE' and 'CANCEL' buttons are at the bottom right.

VALUE PROPOSITION

- Data integration, enrichment, quality and accuracy: data is up to date and in the right place at the right time.
- Revenue growth from increased conversions driven by improved prospect segmentation to improve targeting and nurturing programs.
- Reduced marketing automation licensing fees that are tied to the number of data records through the elimination of bad and duplicate data records. Additional cost savings are also achieved by automating previously manual data management functions.
- Technology cost reduction through the simplification of the marketing technology stack.
- Simplified GDPR management of the data supply chain.

TARGET CUSTOMER

The Openprise platform is ideal for medium to large enterprise businesses across all business types and industry sectors.

Early adopters of this platform have been technology-driven businesses, manufacturing companies, and consumer product businesses. The decision maker/buyer for this product is likely to be a senior head of marketing automation, lead generation or marketing operations. In most cases, the decision maker is a sophisticated, experienced digital marketer concerned about data quality, and with knowledge and experience in lead scoring and management.

A supporting decision maker for this product is frequently the person in the organization responsible for compliance, privacy and security. This function could reside in IT, Legal, Finance or Marketing Operations.

REQUIREMENTS CHECKLIST

- Data integration and enrichment
- Data cleansing
- Data de-dupe
- Match leads to accounts
- Score leads and accounts
- Manage data in marketing systems of record to ensure ongoing accuracy.

PRICING, PERFORMANCE AND ROI

Pricing starts at \$2,000 per month for 250,000 records; the company offers volume discounts as the number of records grows and for non-profit organizations.

Performance is measured by the efficacy of the data management processes (onboarding, cleansing, enriching & unification) and the creation of micro-customer segments that yield better conversion results. ROI can be achieved quickly through a number of means:

- Top line growth - Better segmentation, personalization, lead scoring, and lead routing in Openprise lead to a higher conversion rate and greater revenue.
- Data cost-reduction through elimination of duplicate records.
- Technology cost-reduction through elimination of discrete technology to manage data cleansing, lead to account matching, and data de-duplication.

STACK ENVIRONMENT

The Openprise platform is suitable for environments that have one or more marketing systems of records, typically a CRM system, Marketing Automation and/or a Customer Service platform.

Users of the Openprise platform have the potential to simplify their marketing technology stack by eliminating standalone products for data cleansing, data onboarding, lead to account matching, lead routing and lead and account scoring, reducing both technology costs and stack complexity.

INTEGRATION

Marketing Systems of Record

Integration is core to the functionality of the Openprise platform. Openprise has elected to go deep rather than wide in approaching integration to ensure that users have the flexibility to ingest data in the way that they need. Openprise currently integrates with the following platforms with additional integrations planned for 2018:

Marketing Systems of Record

- Salesforce CRM
- Salesforce Desk
- Marketo
- Eloqua (Oracle)
- Pardot
- Amazon AWS (Data Archiving)

Collaboration Tools

- Box
- Dropbox
- Google Drive
- G-Suite

Openprise Data Marketplace

The Openprise platform ingests data from a growing number of 3rd party data providers. Openprise users can subscribe to these 3rd party provider services directly or through the Openprise marketplace.

3rd party data providers in the Openprise market place:

<https://www.openprisetech.com/data-marketplace/>

INSTALLATION

Installation of the Openprise platform is simple and users can be up and running in as little as one day for a simple application. Users have the option for Openprise to handle the implementation or to do it themselves. Users that elect the “do-it-themselves” approach are supported with 10 hours of consulting to help with customization and a hands-on implementation workshop. Customers can also choose the Data Mechanic managed service offering where Openprise manages all aspects of the solution on behalf of a customer.

COMPETITIVE ENVIRONMENT

In the medium size enterprise environment there is no direct competitor to the Openprise platform; competition comes from point products that are designed to perform some of the features resident in the Openprise platform - data cleansing, data de-duping, lead scoring etc. In a large enterprise environment competition comes from middleware created by Informatica, Talend, IBM or Oracle.

DATA ORCHESTRATION AND CUSTOMER DATA PLATFORMS (CDP)

On the surface there appears to be a great deal of overlap between Data Orchestration Platforms and Customer Data Platforms (CDP). Both types of systems support data integration, unification and cleansing. The fundamental difference between the two is an architectural one. CDPs are most relevant in environments that want to have a single centralized source of customer data and in most cases have a great deal of advertising-generated data. Data Orchestration Platforms are better suited to environments that want to maintain one or marketing systems of record and ensure that the data within each system is accurate, complete and up to date. It is highly unlikely that a CDP and Data Orchestration Platform would exist in the same stack environment.