

# Customer Success Story

## Data-Driven Company Relies on Firstlogic & SAP Data Quality Management

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Quest



Quest Software, a longtime Firstlogic customer, deals with large volumes of data from multiple sources. Correcting the information, matching among databases, and routing the data to the appropriate parts of the organization in a timely fashion are critical to the company's success. This paper provides several examples of how Quest uses Firstlogic and SAP Data Quality Management software to accomplish their goals.

- **Quest Software's fervor about the value of data quality to their organization**  
*Data quality governance is ingrained at Quest Software. They have maintained a data quality staff for fifteen years and understand the importance of high quality data to their continued success.*
- **Data quality for lead generation**  
*Leads come in from all around the world in various forms. Manually separating the legitimate leads from the less-serious ones caused the company to miss opportunities. Automating the process allows the Quest sales team to spend their time working on the most promising leads.*
- **Expedited order processing for improved customer experience**  
*Orders from existing customers need to be associated with their accounts. Disparity among company and individual names on the orders was preventing Quest from responding to requests as rapidly as the customers required. Adding the normalization and matching capabilities of SAP Data Quality Management solved this problem.*
- **Streamlined mergers and acquisitions data drives company growth**  
*Analyzing data coming into the company as a result of mergers or acquisitions requires automation. The volumes of data to process, reformat, match, and combine are too great for anything but a smoothly running system fueled by SAP and Firstlogic tools.*

Since the late 80's Quest Software has been helping companies manage their databases and other systems. Best known for their flagship database connection software, TOAD (Tool for Oracle Application Developers), the company has gone through several transitions and acquisitions as they added products and services.

Today, Quest supports 100,000 customers worldwide and partners with over 6,000 organizations. They use SAP Data Quality Management (DQM) software every day to improve operations such as lead processing and order fulfillment. Quest Software relies heavily on DQM to manage large business acquisitions.

### Proactive Data Quality Processes

A company the size of Quest Software must keep their data clean and accurate. Neglecting the health of their voluminous data would have an expensive impact on business operations. Mergers and acquisitions that have contributed to the organization's growth have heightened the company's focus on data governance.

Dr. Xinguo Wei, Quest Software's Director of Business Intelligence and Data Management, references three pillars of data governance. "It takes people, processes, and technology to ensure consistent data quality," says Dr. Wei, "Technology alone won't be sufficient. At Quest, the company has allocated resources to their data quality efforts for over 15 years."

### Firstlogic & SAP Data Quality Delivers

Quest relies on Firstlogic and SAP Data Quality products and services to help them standardize, match, de-dupe, and enhance the data that enables them to serve their customers. Ethics, integrity, and respect drive Quest Software's relationships with their staff, customers, and partners. Constantly managing data quality allows the company to deliver on their promises.

*"It takes people, processes, and technology to ensure consistent data quality. Technology alone won't be sufficient... the company has allocated resources to data quality efforts for over 15 years."*

Dr. Xinguo Wei | Director of Business Intelligence and Data Management |

As an SAP Gold Partner, Firstlogic helps Quest Software get the most from their investments in tools like SAP Data Quality Management and SAP Information Steward. These solutions have helped improve the way Quest does business and have had an impact through real-time integration across their global enterprise.

### Lead Automation Increases Responsiveness

Quest Software has aggressive targets for swiftly delivering new leads to the sales team. With numerous leads coming from many sources, Quest needed to automate the process. They could no longer rely on human data stewards to review and qualify each lead, let alone verify and correct the data before sending it to the proper sales associates.

"It's pretty amazing to see some of the address transformations DQM performs based on the information we receive," said Chris Haiduk, Senior Business Systems Analyst at Quest Software, "Just when you think it won't make heads or tails of an address it ends up parsing, correcting, standardizing, and putting everything into the right fields."

Quest refers to information that does not represent real sales opportunities as "junk leads". These inquiries are frequently missing vital information. It was taking too much time to manually research and filter the junk leads before legitimate opportunities could be sent along to sales.

### **Data Quality Rules Expedite Leads**

With SAP DQM, Quest Software built business rules for qualifying leads. DQM compares the data to established filters and then standardizes and corrects the lead before sending it to sales. Quest Data Stewards only receive leads the DQM system could not resolve because of missing or bad data. With DQM, Quest lowered the volume of leads requiring human intervention and helped deliver quality opportunities to the sales department quickly, meeting the company's internal deadlines. Now sales associates receive clean data for follow-up action.

The system also allows for feedback from sales as they evaluate leads they receive. Quest built custom reference files which the sales department constantly updates as they identify more ways to filter the junk leads.

Quest Software subscribes to address correction dictionaries from across the world to aid in their data quality efforts and streamline the lead processing workflow. This allows DQM to automatically organize leads based on geographic location and intelligently route them to the right sales team for the region.

### **Data Quality Matching Automates Order Process**

Quest Software uses electronic data interchange (EDI) to automate customer orders. Their software orders typically require a code or key be sent to unlock the product or increase the license capacity. It is very important to Quest to expedite this process to provide the best customer experience.

Quest needed to determine if orders came from existing customers, and this caused a bottleneck and delay. The orders contained inconsistent company names or contact information and forced Quest to match many of the orders manually.

*"It's pretty amazing to see some of the address transformations DQM performs based on the information we receive,"*

Chris Haiduk | Senior Business Systems Analyst | Quest Software

### **Order Automation Time & Cost Savings**

With SAP DQM, Quest uses "fuzzy logic" to help with the matching process. Now, Quest software processes 85% of EDI orders with no manual intervention, thanks to DQM automation. Data that does not match to existing Quest Software customers is used to automatically create new records in the database.

Because of order processing automation, Quest Software customers receive quicker order fulfillment and Quest can invoice them sooner – big wins for the company in both areas.

### **SAP DQM Enterprise Data Quality Hub**

Along with many other data quality routines they have developed, Quest Software deployed the SAP DQM solution as a web service. These callable modules are now in use in two other business processes, saving the company development time and freeing technical resources to work on other projects. Quest built a DQM Hub containing routines that support on-demand and batch processes throughout the day.

## Mergers & Acquisitions Automation

Manually integrating accounts from a merger or acquisition is impossible on the scale Quest Software requires. In some cases, Quest Software must compare, merge, resolve, or add millions of acquired records. The company estimates data quality audits take six to ten minutes per record. With hundreds of thousands of records to process, automation is clearly necessary!

To solve this problem, Quest used their favorite tool, SAP DQM. For a large acquisition project they found it beneficial to utilize Siebel's Universal Customer Master (UCM) solution. Siebel UCM mimicked Quest's customer master database. It used DQM matching under the covers to quickly compare acquired data to the existing customer records, eliminating the need for list-to-list comparisons. Quest also deployed real time matching, allowing human data stewards to find potential matches during manual clean-up, preventing duplicates from entering the system.

## SAP DQM & Siebel CRM/UCM Seamless Integration

To coordinate the work performed by SAP DQM and Siebel UCM, Quest Software used Firstlogic's DQM for Siebel connector software. This connector seamlessly integrates the SAP DQM capabilities directly into the Siebel CRM/UCM application.

This tool combination enabled Quest to match a good portion of the records from acquired or merged organizations. Where the data quality software solution found a match, manual analysis was unnecessary. This solution kept duplicates from entering Quest's systems, minimizing costly and time-consuming post-merger file clean-up.

The Siebel UCM software also allowed enhancement via data from Dun & Bradstreet. Account data passed to Quest's customer relationship management systems included valuable data for sales and support departments as they contacted the newly acquired accounts. Firstlogic's DQM for Siebel CRM/UCM connector software made the Siebel UCM come alive.

*"The ability to reuse these jobs has saved me many hours of development time over the years. There's no need to re-invent the wheel if it works well."*

Chris Haiduk | Senior Business Systems Analyst | Quest Software

## Quest, Firstlogic & SAP --- A Successful Partnership

Companies like Quest Software rely on Firstlogic and SAP data quality tools to improve business processes, handle challenging tasks, and deliver levels of service their customers expect. Many of those companies also rely on the experts at Firstlogic to help them acquire, implement, and configure their software. When they need help, training, or advice, Firstlogic provides customers like Quest Software decades of experience with data quality best practices.

Firstlogic Solutions is an SAP Gold Partner specializing in delivering Firstlogic and SAP data quality solutions to data-driven companies. SAP Data Services (DS) and Firstlogic Data Quality (DQ) software combines file preparation, data profiling, address quality, data enhancement, and matching/consolidation.

To find out how software from Firstlogic & SAP can help your organization be more productive, accurate, and competitive, contact us to schedule a discovery call and arrange a free trial.

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