



# CONTACT CAPTURE

**Broadlook Contact Capture®**

**White Paper**

by

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# CONTACT CAPTURE

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## **PART 1: Contact Information: Simple but Critical.**

The nature of contact information is fairly finite (i.e. Company, URL, Name, Title, Email, Phone, Social Network membership, etc). In addition, the concept of contact information is a simple one to grasp. It is so simple, in fact, that it often gets overlooked. One of the most important concepts in business is “be brilliant at the basics”. If you are brilliant at your basics, many more complex processes will fall naturally into place. Sales, marketing, business development and recruiting professionals know that quality of information is the “life blood” of every business. So how are you treating contact information? The mishandling of contact information can lead to dire consequences across your company.

### **Company X; Does your company look like this?**

- You and your team are manually typing contact information into your CRM system.
- You have a significant problem with outdated and inaccurate data in your CRM
- Over 30% of your records are duplicates.
- You don't have a standard format used at your company for entering contact information. Every person “wings” it with their own unique style, adding as many duplicates as there are unique personalities.
- When contact information is entered, your team enters the bare minimum (name, title, email, and phone) but not the details desired (phone extension, location, secondary phone number, cell phone, and address).
- Since short cuts are taken entering contact information, important details such as lead source and notes are ignored when entering contact information into your CRM.
- There are lost leads and opportunities because the contact information entered were incorrect and incomplete
- Sometimes sales reps are working on the same accounts and they do not know it.
- Reporting is a nightmare. You want to do it, you really want to, but, because of the inaccuracies- reporting is futile...
- Once every few years or so, you make it "your mission" to remove the duplicates from your system.



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## Company X has the following attributes:

- 10 sales representatives
- Each sales rep enters 10 new contacts per day into their CRM system
- Hand entering contact information takes an average of about two minutes per contact

## Company X Metrics:

- Twenty minutes per day, per person, manually entering contact information
- One hundred (100) minutes per week, per person, manually entering contact information
- At 48 selling weeks per year, two weeks per year, per person are spent entering contact information
- Organizationally, that equates to 20 weeks per year entering contact information
- At 48 selling weeks per year, that means that 1/24th of each person's time or approximately 4% selling time is taken up doing data entry.
- Assuming a \$60,000 annual salary for a sales rep, Company X loses \$2500 per person per year through loss of efficiency
- Total direct loss of revenue for Company X: \$25,000

## Company X Realities:

- Humans are fallible. Twenty percent (20%) of records hand entered into a CRM or ATS are miss-keyed.
- Humans take shortcuts. Most people enter the absolute basics: Name, email, and phone. Usually full titles, locations, full company names, etc. are skipped.
- Miss-keyed information causes additional errors and degradation in data quality.
- People get tired. Towards the end of the day, the two minutes that it takes to enter a record becomes three or four
- People don't usually look up the record in their CRM first before entering it. Thus duplicates are introduced.
- We all get interrupted. This causes a break in the work flow, more keying errors, more duplicates, less homogeneity.
- Each person has their own style. You say "The Container Company", I say "Container Company, The". Again more duplicates! The scary thing is that there many, many ways to write "The Container Company".

Container Company

Container Co

Container Co.

The Container Company

The Container Co

The Container Co.

Container Co, The

Container Co., The

Container Company Incorporated

Container Company Inc.

The Container Company Incorporated

The Container Company Inc

Container Company Incorporated, The

Container Company Inc, The

Container Company Inc., The

Container Co Inc, The

Container Co. Inc, The

Container Co. Inc., The



# CONTACT CAPTURE

Container Company, The

The Container Company Inc.

Container Co Inc., The

## **PART 2: Contact Capture overview**

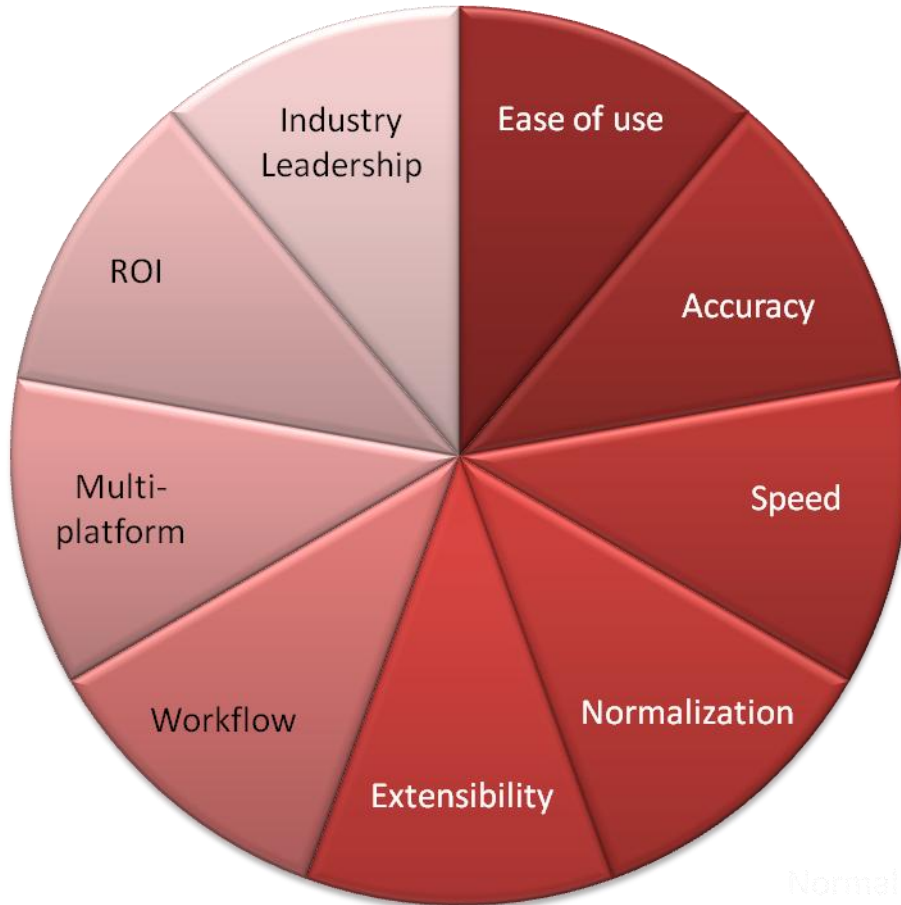
Contact Capture is the premiere contact information parsing technology used for sales, marketing, recruitment, business intelligence, competitive intelligence, research, and list generation. Contact Capture is wholly owned and developed by Broadlook Technologies and is available as an installable application, SaaS implementation or licensed technology. Contact Capture automates the entry of contact information into a CRM, SFA or ATS.

This document will detail the benefits of using Contact Capture an integral part of any CRM, SFA, ATS and proprietary database and related systems.



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## The Contact Capture Advantage



Normalization  
n



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## Advantage 1: Ease of use

The entry of contact information is something that nearly every sales, marketing and business development professional performs. Unfortunately, it is widely accepted that this task is done manually.

In some occasions, a user will find contact information that is for a single person. In other situations, contact information may exist in clusters where multiple people from the same company are listed. Contact information may also be grouped together where there are many different people, each from different companies.

The three situations are:

- Single contact
- Multiple contacts, same company
- Multiple contacts, multiple companies

These are three different situations and may require different algorithms to parse the information most efficiently. The engineers at Broadlook decided that this complexity should be transparent to the user. The end result is that Contact Capture has a single interface that facilitate the capture of single or multiple contacts.

There are several benefits to hiding complexity from the user and maintaining a single interface:

- Shorter learning curve
- Greater usability
- Higher adoption rate

This paper would be remiss if we did not mention other technologies that perform contact information parsing. Two notable products that do single capture of contact information are Anagram ([www.getanagram.com](http://www.getanagram.com)) and AddressGrabber ([www.egrabber.com](http://www.egrabber.com)). While these products perform adequately with highly structured data, they fail when data leaves an environment of high structure. *See table 2; parsing accuracy relating to environment structure.* In addition, these products only work with a single contact at one time. While eGrabber has a product, ListGrabber, which will capture multiple contacts at one time, it is (1) a separate product from the AddressGrabber that requires a separate purchase and installation (2) has a different interface than AddressGrabber and (3) it only works will in a highly structured environment.

Contact Capture includes a single interface; it works the same with 1 contact or 100. The user never needs to change how they interact with the software. ***For the desktop version, the user simply needs to highlight information to be captured and press CTRL C+C on the keyboard.***



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## Advantage 2: Accuracy

Contact Capture's parsing engine is based on Broadlook Technologies proprietary parsing algorithms. Since 2002, they have been continually updated and improved. Most generic parsers are designed specifically for single contacts within a highly controlled set of input data. The main focus in generic parsers is the recognition of contact information in a highly structured set of input data. The core parsing inside Contact Capture was developed to find contact information from within unstructured data. Therefore Contact Capture excels at both finding *and* recognizing contact information.

Since the Contact Capture engine excels at both finding and recognizing contact information, the drop off in accuracy is minimized when faced with a highly unstructured environment. Typically, most other parsers fail miserably once information leaves a pristine structured format. The graph below shows the accuracy drop off moving from a simple, highly structured environment towards the far end of the spectrum which is implicit structure

**The complexity of recognizing contact information adheres to the following continuum:**

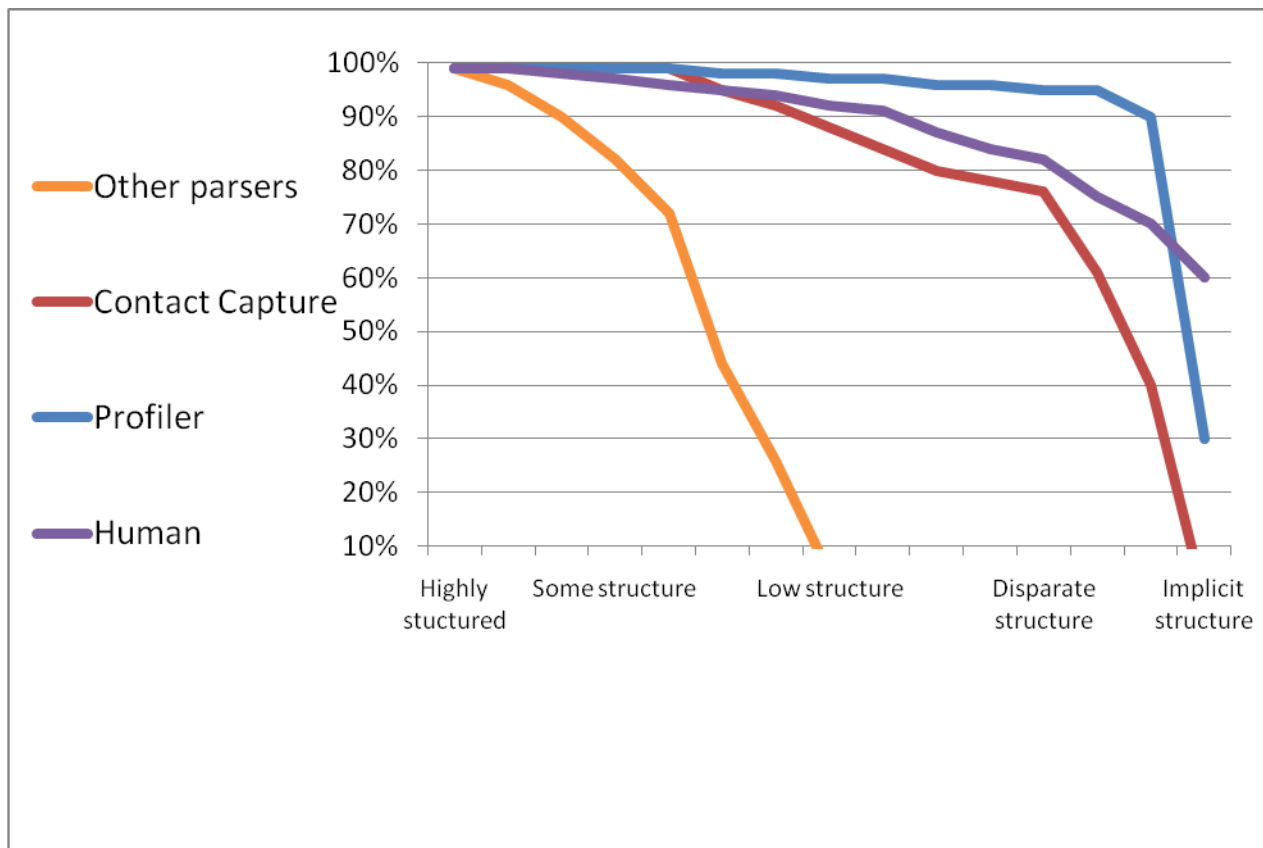
EASY					HARD				
Highly structured	Some structure	Low structure	Disparate structure	Implicit structure					

*Table 3: Continuum of Contact Information context complexity*



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Contact information is everywhere. The context in which contact information exists affects the difficulty in extracting information from the “noise” (extraneous data) surrounding it. The continuum of complexity start with highly structured information which is easy to recognize and capture to the extreme hard task of recognizing implicit structure within surrounding noise.



*Table 4 – parsing accuracy relating to environment structure*

The table above illustrates how Contact Capture holds up at each level of environmental complexity. AddressGrabber, ListGrabber and Anagram are grouped together as “other parsers”. Profiler is an enterprise class product which is based on the Contact Capture® engine. Profiler is an evolution from Contact Capture due to the fact that a tremendous amount of post processing is done after initial data recognition. Profiler add the analysis of context, analysis of data source, analysis of page type (if from website), as well as aggregation from multiple sources and scoring of data. The human is still by far the most accurate, except when getting into the realm of implicit recognition. Humans fall of at this point do to the mass amounts of data that would need to be reviewed.



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## Definitions of environmental complexity for contact information

**Highly structured** – The most significant attribute of highly structured data is the lack of ambiguity. Typically this would include labels on values as to remove any ambiguity on what each data element consists of.

**Some structure** – Contacts with some structure is the most commonly seen in email signatures and mailing address blocks within websites. In addition, most lists that consist of multiple contacts reside in this category. While there may be some ambiguity, lists may or may not adhere to a consistent order to the structure.

**Low structure** – Contact information with low structure tends to exist within sentence structure or a combination of some structure and sentence structure. The English language is not ordered to the level of a list, therefore analysis of language structure must be part of recognition process in order recognize data.

**Disparate structure** – When contact information is disparately placed it is simply residing in multiple, non-contiguous locations. In addition, the different pieces of contact information may be intermixed with different contacts. A name-phone pair may come from one source, a name-email pair from another source and a name-title pair from a third source. To resolve disparately placed contact information, the information must be intelligently merged.

**Implicit structure** – Humans are still the best at recognizing implicitly structured contact information. To recognize implicitly typed information, a conceptual leap must be made based on knowledge from outside the set of data being analyzed. For example: Knowing that Bill is short for William is not information that would be inside the analyzed data. To succeed in recognizing implicit connections requires both the analysis of sentence meaning as well as a large set of rules based in expert systems or a neural network.



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## Advantage 3: Speed

Contact Capture's parsing engine was developed from the ground up to be extremely fast. This is different from the architecture of other parsers that are meant for extracting a single contact. When extracting a single contact, speed is not important. Four microseconds does not look any different to the user than 200 microseconds, however, when data leaves the realm of being perfectly formatted, or information comes in large quantities, speed becomes very important.

When provided a larger list of contacts (112 in this example), Contact Capture parsed the information in .047 seconds which is less than 4/1000<sup>th</sup> of a second per contact. The test done on Windows Vista, Intel CPU, approx 3 GHZ, dual core processor (<\$1000 machine purchased in 2008).

The example used is here: <http://www.broadlook.com/contactcapture/contactcapture.htm>

Contact Capture 3.2.20.338 - Registered to Donato Diorio

File Edit Search View Contacts Tools Help

← → + - Capture Delete All Export All... Export Selected...

First	Last	Title	Email	Company	City	State	Zip	Website	Phone1	Phone2
Setsuko	Reindel	CEO	setsuko@lls.com	Livestock L	Montgomery	AL	36130		334-555-4	334-555-4
Loretta	Johnson	Marketing Director	loretta@lls.com	Livestock L	Montgomery	AL	36130		334-555-7	334-555-3
Veronica	Smith	CFO	vsmith@acli.com	Arctic Comp	Fairbanks	AK	99709	http://www.a	907-555-2	907-555-2
Shelba	Vilar	Director of HR	svilar@adobeauto	Adobe Autr	Phoenix	AZ	85007		602-555-2	800-555-5
Rafael	Bay	Recruiter	rbay@adobeauto	Adobe Autr	Phoenix	AZ	85007		602-555-2	800-555-5
Carolyn	Sutera	Stage Technician	carolyn@ozarkent	Ozark Ente	Little Rock	AR	72219		501-555-0	501-555-0
C	Kamin	CEO	cdk@lunarspice.co	Lunar Spice	Sacramento	CA	95814		916-555-6	916-555-4
Bethanne	Gengo	CFO	bg@lunarspice.co	Lunar Spice	Sacramento	CA	95814		916-555-2	916-555-4
Guadalupe	Guinard	Director	guadalupe@lunars	Lunar Spice	Mather	CA	95655		916-555-4	916-555-4
Odra	Lenane	HR Consultant	orda@ee.com	Experts Ex	Denver	CO	80246-1		303-555-2	303-555-1
Ulric	Wilkening	President	ulric@ee.com	Experts Ex	Denver	CO	80246		303-555-3	303-555-0

ATE

FIRST CONTACT

Single View  Grid View

1 / 112  Overwrite

BUILT BY **broadlook**

0.047 s

Table 5: Contact Capture, capture speed - 112 contacts captured in .047 seconds



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The core parser inside Contact Capture is the same engine/technology used inside Broadlook's Profiler. Profiler is a web crawling technology that scans 1000's of pages per minute looking for relevant contact information. With the massive amount of data that is processed via 10,000's of user installations worldwide, the Contact Capture engine is being stress tested every second of every day.

Information about Broadlook Profiler can be found at <http://www.broadlook.com/products/profiler>

## Core parsing – Specialty engines & testing methodology

Being able to recognize a trend in an environment and adjust accordingly is a characteristic of learning. For example, recognizing job titles within the healthcare industry may cause a conflict in working with companies in the Information Technology industry if the same recognition engine is used for all cases. When a human is reviewing a group of companies in the healthcare industry, there is a heightened sense of awareness of what probably constitutes a title. When a parsing engine has a higher awareness of the greater environment, accuracy increases significantly. Contact Capture has been trained on a multitude of industries to assure the highest degree of parsing accuracy. In addition, this heightened sense, the knowing that one is looking for a healthcare related title helps to remove potential ambiguity when determining if a piece of information is a person's name or company name.

When testing a parsing technology, more is better. One method to continually improve the parsing is to wait for a parsing aberration to occur and then fix that case. The problem in fixing case by case issues is that each fix may cause problems in other areas. This incremental fixing is sometimes referred to as a "hack". On occasion, clients in the field yields case example that could not have been planned for and a fix must be implemented, hence a fix must be implemented.

To avoid small aberrations, fixes, hacks, and potentially breaking something that works in the process, Broadlook has implemented several methodologies to minimize parsing aberrations.

- **Massive test cases.** Using a combination of Broadlook's web spidering technology (to find test cases), along with human-reviewed test results, Broadlook has aggregated a massive test case for expected results when parsing. This process minimizes the potential of new "fixes" breaking existing parsing capabilities.
- **Industry specific test cases.** Healthcare, Information Technology, Education and Government each have differences challenges in working with contact information due to the nomenclature and context in which the information resides. Context is important. Knowing the context of a page or website that includes a set of contact information can give clues that lead to better parsing and the usage of specialty engines.
- **Proactively seeking new test cases.** Five years ago, the job function and therefore title Social Networking Consultant would not exist. Broadlook proactively seeks to learn about new industries, definitions and trends to stay a step ahead of the needs of our clients. As new industries develop, it is important to seek



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thoroughness vs. waiting for a single aberration to occur. Examples here would be “Nanotechnology” and “Drug Discovery.” Each adds a whole series of words and phrases that have to be accounted for in parsing rules.

## Advantage 4: Normalization

### Understanding the problem

Nearly every CRM company and internal corporate IT department has taken a stab at solving the problem of data normalization. Unfortunately, no one has done it right! Why? Think about it: when you buy a CRM system it is usually empty. If you import dirty data from an old CRM, the new CRM will be dirty.

Normalization cannot be dictated at the vendor level

CRM systems are not designed to normalize data. Why? A good CRM must deliver flexibility to each client implementation; normalization cannot be dictated at the vendor level. Therefore, it is left to each individual customer and each individual user to enter and import data in the way that they see fit. For the CRM vendor it is a lose-lose scenario. If they dictate a data format, whichever format they choose, be it verbose or abbreviated, someone will not be happy.

Massive duplicates and inaccurate data does not become a problem until you need the information in the system. About a year after the CRM is implemented is typically when the buyer realizes there is a huge problem with the information. Without some systematic way to start with and keep information clean, duplicates will be introduced and someone has an opportunity to make more \$\$ on professional services.

One of the most important concepts affecting organizational efficiency is having a “single point of truth” (SPOT) for contact information. Without SPOT, organizations lose efficiency and effectiveness. SPOT is the highest standard for contact information (company names, addresses, titles, emails and phone numbers). While some companies may never reach 100% SPOT, it is something that should be strived for.

What are most common attributes of companies that don't use SPOT?

- Massive errors in CRM data
- Over 30% of CRM records are duplicates.
- No standard plan/format/procedure adopted for entering contact information. Every person wings it with their own unique style, adding as many duplicates as there are unique personalities.



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## Solving the Problem

You could hire the best consultant to clean your data. What happens after they leave? If you don't have a plan of attack for handling data ("Data-Plan"), then every new contact or company that gets put into your system can corrupt your clean data. Every company needs a Data-Plan.

### What is a Data-Plan?

A Data-Plan is an enforced set of rules for entering data into a system. It can be simple or complex. Enforcement is the key component of successful Data-Planning. All the rules in the world amount to nothing if the rules are not enforced.

Some example rules in a Data-Plan

Rule	Right	Wrong
Remove all periods from company name	Container Company Inc, The	Container Company Inc., The
Company name suffixes are abbreviated	Container Company Inc, The	Container Company Incorporated, The
Put "The" at the end of company name	Container Company Inc, The	The Container Company Inc

The example above contains three simple rules. Without a Data-Plan that is enforced, we would have a possibility of a single company being entered in many ways. This concept is what leads to mass duplication in CRM systems.

Container Company	Container Co, The	Container Company Incorporated, The
Container Co	Container Co., The	Container Company Inc, The
Container Co.	Container Company Incorporated	Container Company Inc., The
The Container Company	Container Company Inc.	Container Co Inc, The
The Container Co	The Container Company Incorporated	Container Co. Inc, The
The Container Co.	The Container Company Inc	Container Co. Inc., The
Container Company, The	The Container Company Inc.	Container Co Inc., The



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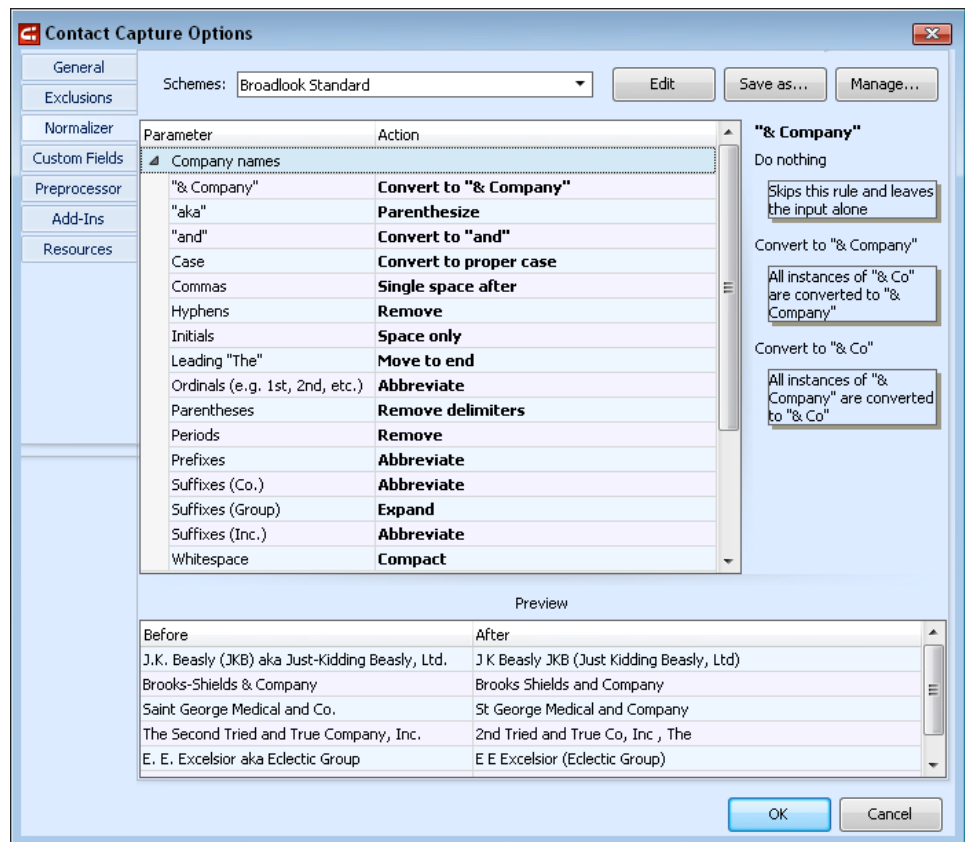
With the above example, it may seem daunting to get control of contact information. There are a tremendous number of possibilities. Those possibilities, left uncontrolled, can create massive duplicates in a CRM.

## There is a simple solution

Contact Capture has a powerful built-in data normalizer (CRMShield™) that keeps data in a consistent format. The format is user-selected for maximum flexibility. Basically, the normalizer in Contact Capture can help you build, test and implement your Data-Plan. Once your Data-Plan is created, you can distribute it throughout you company.

The Normalizer works on major areas of contact information including:

- Company names
- Contact names
- URL's
- Street addresses
- Cities
- States and provinces
- Phone numbers
- Job titles



Screenshot of the Data Normalizer in Contact Capture



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## The Dirty Data Quiz: Is Your CRM at Risk?

### Data-Plan

(15 points)

Does your company have a standard format for CRM data? If you don't, this is where you start the entire process. To comply with best practices, your Data-Plan should be centrally stored, accessible by anyone who enters data into your CRM. In essence, the Data-Plan acts as a single-point-of-truth for your company and how it treats data. Score: \_\_\_\_\_

### Staff Training

(5 points)

Has your staff has been trained on your Data-Plan and it is easily accessible? While this is a great step, it is not as important as making the CRM enforce your Data-Plan automatically. If your CRM does offer a feature like this, the training is most important for your IT department who can circumvent the constraints put on the average user. Score: \_\_\_\_\_

### CRM Cleaned

(5 points)

Has your CRM gone through a full normalization and de-duplication process? Once you have your Data-Plan developed, you need to ensure that the data you have meets the plan. Why only 5 points? A one-time cleaning does not solve the long term problem. Don't pat yourself on the back for this, if this is all you do, you will have one month per year of clean data. Score: \_\_\_\_\_

### CRM Enforcement

(15 points)

Is your Data-Plan enforced by your CRM? This is tremendously important. The reality is that not one CRM provider (that I have seen) has a detailed data normalizer that can enforce your Data-Plan like Broadlook's CRMShield™. If your provider does not have this feature, it means you must either build or find an add-on to your CRM. An even better option is to would be to provide all users to the CRM a tool like Broadlook's Contact Capture to enter contacts into your CRM. Score: \_\_\_\_\_

### Integration Enforcement

(10 points)

Do products that bring information into your CRM adhere to your Data-Plan? Beware of products that dump data to an Excel or CSV file. Sometimes it is unavoidable, however, direct exporting systems that (1) comply with your Data-Plan and do de-duplication in are always a superior choice. Score: \_\_\_\_\_

### Vendor Enforcement

(10 Points)

Do vendors that provide you with list data deliver it in compliance with your Data-Plan? Some vendors may push back at first; however, it has been my experience that the entire process will go smoother if the vendor complies with the Data-Plan. Hold your ground and remember that list providers want your business. Show them the format that you want your data ...and don't compromise.

Score: \_\_\_\_\_



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## Technical Culture

(5 Points)

Does the IT staff buy-in to following the Data-Plan? The best way to make this happen is include the IT department in the development of the Data-Plan.

Score: \_\_\_\_\_

## Technology Enforcement

(15 Points)

Is your IT staff prevented from circumventing a DataPlan by rights management? Everyone must obey the Data-Plan. If your IT staff can circumvent best practices established by management, problems will arise. If the IT staff disagrees with a Data-Plan, best practice dictates that the Data-Plan reviewed, discussed and potentially revised. Again, this maintains the single point of truth and enforceability to make your Data-Plan work.

Score: \_\_\_\_\_

## URL Enforcement

(20 Points)

The URL is the Rosetta stone for keep track of companies and contacts within them. Do you have a URL (website) field for each company in your CRM? The URL of a company is more important than a DUNS number, location or anything else. It is the single best piece of company-centric information that can be used to update the CRM over time. The URL can be used to update and add contacts to your CRM with tools like Broadlook's Profiler.

Score: \_\_\_\_\_

**Total Score:** \_\_\_\_\_

## How did your CRM Score?

Score	Grade
<20	F
40	D
60	C
80	B
100	A



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## Advantage 5: Extensibility

In some situations, Contact Capture (or any parser) will cease to work due to complexities within a set of text information. Examples:

- Too much spacing between different pieces of contact information
- Extraneous text within the text sample ( such as 10 digit numbers that are NOT phone numbers)
- Duplicate contact information scattered across a large span
- Implicit breaks that denote the end of one piece of contact information and the start of another

One of the most important features of Contact Capture’s plug-in architecture is that it is an OPEN API. This gives users, partners, and OEMs the ability to create custom solutions for any environment. It empowers the users with options. This is contrary to vendors like eGrabber, who will charge for custom plug-ins

The open, plug-in architecture allows either (1) an end user or (2) an integration partner to insert business logic inside the Contact Capture engine. Below is an example invoice for Mountain Gear Corp. The original document had too much ambiguity to be parsed 100% accurate. Using a plug-in that removed extraneous part of the invoice, Contact Capture was able to parse the document at 100% accuracy.

Before	After														
 <p><b>Sale Date:</b> 4/8/2009 12:45:30 PM</p> <p><b>BILL TO</b> Michelle Samuels 1111 Glacier Creek Way Elk Coast, CA 95611</p> <p><b>CUSTOMER ID #:</b> 13936</p> <table border="1"> <thead> <tr> <th>COUNT</th> <th>SEAT TYPE / OBSR</th> <th>SECT</th> <th>ROW</th> <th>SEATS</th> <th>PRICE / TICKET</th> <th>TICKET GROUP TOTAL</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>\$150.00</td> <td>\$300.00</td> </tr> </tbody> </table> <p><b>Payment Information</b> Pymt Type: Credit Card Date: 4/8/2009 12:45:45 PM Amt Details: \$317.00 Details Visa 2222****2222 (Michelle Samuels-&gt;1/2011) ID: 21467623 Auth: 709411 AVS Code: Y</p> <p><b>Expense Information</b> Expense Type: Mountain Tent Amount Notes: \$300.00</p> <p><b>Invoice Notes</b> Notes: External PO#: n/a</p> <p><b>SHIP TO</b> Samuels, Michelle 9668 Glacier Creek Way Elk Grove, CA 95624 (916)331-0172 FedEx 2nd Day</p> <p><b>CONTACT INFORMATION</b> Main: (916)555-0172 Fax: Email: rkl@mountaingear.com</p> <p><b>INVOICE SUB-TOTAL:</b> \$300.00 <b>SHIPPING:</b> \$17.00 <b>TAX:</b> \$0.00 <b>OTHER EXPENSES:</b> \$0.00 <b>GRAND TOTAL:</b> \$317.00 <b>OUTSTANDING BALANCE:</b> \$0.00 <b>DUE DATE:</b> 4/8/2009 12:45:31 PM</p>	COUNT	SEAT TYPE / OBSR	SECT	ROW	SEATS	PRICE / TICKET	TICKET GROUP TOTAL						\$150.00	\$300.00	 <p><b>Sale Date:</b> 4/8/2009 12:45:30 PM</p> <p><b>BILL TO</b> Michelle Samuels 1111 Glacier Creek Way Elk Coast, CA 95611</p> <p><b>CUSTOMER ID #:</b> 13936</p> <p><b>SHIP TO</b> Samuels, Michelle 9668 Glacier Creek Way Elk Grove, CA 95624 (916)331-0172</p> <p><b>CONTACT INFORMATION</b> Main: (916)555-0172 Fax: Email: rkl@mountaingear.com</p>
COUNT	SEAT TYPE / OBSR	SECT	ROW	SEATS	PRICE / TICKET	TICKET GROUP TOTAL									
					\$150.00	\$300.00									



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## Advantage 6: Workflow

Contact Capture is the choice of leading CRM and Applicant Tracking System vendors. Contact Capture seamlessly integrates with target systems by using Broadlook Universal Exporter (BLUE). BLUE is middleware technology which supports desktop, client-server, web-based, embedded, mobile, and mashable technologies.

## The Compatibility Continuum

Broadlook Technologies' Contact Capture is the world leader in integrating contact information into CRM's. Contact Capture is integrated with CRM industry leaders such as SalesForce.com, Netsuite and Microsoft CRM. *Broadlook Technologies is the technology and thought leader on best practices relating to capturing, coding and moving contact information into CRM's and applicant tracking systems. To date, Broadlook has facilitated over 100 integrations ranging from commercial CRM's and ATS's to proprietary in-house databases.* In addition, Contact Capture is the technology of choice of the 8 of the 10 top Recruiting CRM's including market leaders such as Bond, Bullhorn, MaxHire and PC Recruiter.

The quality of CRM integration has a direct correlation to a quality of user experience. There are 7 distinct levels of integration which exists as it relates to contact information parsing and a target CRM/ATS system. In most cases, Contact Capture supports the strongest 3 types when working with a technology partner (Embedded, Transparent and Seamless).

User experience improves with each enhancement in the quality of integration. Each plateau of integration has distinct differences which greatly affects user experience. The level of user experience adheres to the following continuum.

WORST USER EXPERIENCE <<<<				>>>> BEST USER EXPERIENCE		
Basic compatible	Indirect integration	Indirect Mapped	Direct integration	Seamless integration	Transparent integration	Embedded integration

Table 1: Integration level and user experience



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## **Basic Compatible**

Compatibility means that two systems can work at the same time or on the same system. It does not mean that the two systems interact in any way; it simply means that the two systems will not adversely affect each other when implemented within the same framework (operating system or SaaS model).

## **Indirect Integration**

An indirect integration automates one or more pieces of the portions of the process of two systems working together. In the case of Contact Capture integrating into a CRM, an indirect integration would be facilitated by exporting to an intermediary file in Excel or comma delimited format. For example, if data is captured and exported into a comma delimited file (.CSV) and this file can be imported into a CRM, this would be an indirect integration. While indirect integrations solve issues as it relates to data entry mistakes, it does not address the issue of dealing with duplicates. In addition, experience has shown that the more steps that are added into a process, the less likely that it will be adopted (usage apathy).

## **Indirect Mapped**

A mapped export is a pre-defined .CSV file that is saved as a BLUE .MAP file. Typically, a target CRM has a “best case format” for data input. Leveraging MAP files allows a single, expert, administrative user to configure export specifications one time to match the particular nuances of a target CRM system. Once developed, a map file can be easily distributed to all users within an organization. Thus, the technical complexities are hidden from the common user.

## **Direct Integration**

The ability for a system to transfer contact information directly into a target CRM is a direct integration. A direct integration includes a one-way transfer of data into the target system. The only communication with the target system is the step of authenticating a user. Typically, login credentials are entered upon the first export within the BLUE (Broadlook Universal Exporter) middleware. Upon subsequent exports, the user has the option of used credentials that were exported from a previous session, or reenter new authentication credentials. In a direct integration, no querying of existing data is done. The major drawback in a direct integration is the lack of asynchronous communication with the target system. Without communication with the target system, there can be no business logic implemented for the checking of duplicates. A necessary attribute in CRM integration is the tagging of records. Tagging allows for each record to be coded with important information like information source and username. The benefit of tagging is apparent when doing any type of reporting. Tagging of records is possible in a direct integration. However, due to lack of asynchronous communication, no normalization, standardization or



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control of any sort can be implemented unless tags are hard-coded into the software. Hard coding of tags is problematic as they are not easily defined (moving target), extended (recoded) or distributed (software update).

## **Seamless Integration**

A seamless integration builds on the Direct Integration model and adds asynchronous communication. By being able to communicate with the target system, an entire range of possibilities can be realized. For example, by querying the target system for existing records, a duplicate handling strategy can be implemented. In addition, the “controlled tagging” of exported records can be achieved. Controlled tagging is the process of adding tags to exported records that originate from an approved list of tags. The approved list of tags or codes can be queried directly from the target CRM or Applicant Tracking System. Under a seamless integration, a normalization strategy can also be enforced.

## **Transparent Integration**

A transparent integration builds on the direct integration but avoids the step of authentication. Instead of the user having to enter credentials, the two systems facilitate the hand-shaking processes of authentication. In addition, the entire export process will be handled (or appear to be handled) by the target system. While a range of technical methods may be used, the actual means of accomplishing the export are subservient to the user experience of the export; what is critical is that the user experiences transparency. Typically, a transparent integration is accomplished by the two systems communication via an API, or set of API's. Transparency does not mean that the user does not see or know that two systems are working together, but that they don't experience any interruption of workflow from one technology to the other. Basically, the applications/technologies are both present, yet blended. Where one technology starts and the other stops is not apparent.

## **Embedded Integration**

When the two technologies are distributed together and there are no distinct individual pieces, the integration can be considered embedded. An embedded integration is seamless and transparent. In the best embedded implementations, the fact that an outside technology is being used is hidden from the user.



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Contact Capture brings value to the end user with proven technology that has an outstanding track record. Examples of Contact Capture's superior ratings can be seen by its "5 out of 5 stars" on the salesforce.com appexchange and 4.6 out of 5 stars on the SugarCRM SugarForge.

The screenshot shows the Salesforce AppExchange interface. At the top, it says "force.com appexchange" and "Salesforce CRM | Community | Developer Force". The navigation bar includes "Home", "App", "Getting Started", and "Publishing". A "Find Apps" search box is visible, along with "Or Browse by Categories". Below that, a "Your Saved Apps" section states "You currently do not have any saved apps. Once you save apps, you're able to compare. Browse apps now >>". The main content area shows the "Contact Capture" app listing by Broadlook Technologies, dated 1/14/2008. The app description states: "Contact Capture makes it easy and quick to add contact information from emails, documents, spreadsheets, and webpages into your Salesforce database." A prominent "5.0 out of 5" rating is displayed with five stars.

The screenshot shows the SugarCRM SugarForge interface. The top navigation bar includes "Open Source CRM", "Community", "Downloads", "Installation", "Documentation", "Help", "Developers", "Forums", and "Projects". A search bar is present with "Search the entire project" and "Advanced search" options. The main content area is titled "Contact Capture for SugarCRM" and includes tabs for "Overview", "Resources", "Reviews", "Forums", and "Developer". A sidebar on the left lists various navigation options like "Main", "Open Source CRM", "Community", "Downloads", "Installation", "Documentation", "Support", "Forums", "Projects", "Browse by application", "Account Mgmt", "Banner Tracking", "Books", "Bug Tracking", "Calendar", and "Campaign Mgmt". The main content area features the "CONTACT CAPTURE" logo, a description: "Contact Capture is free for SugarCRM users. This tool makes entering leads into SugarCRM quick and easy just highlight, hit CTRL+CC, and Export as a Contact, Target, or Lead http://www.broadlook.com/contactcapture/trial/registration/?ref=sugarcrm", and a "Project Info" table. An "Average rating of 4.6 out of 5 stars" is also displayed.

Project Info	
Application	Contact Mgmt, Integration, List Mgmt
Development Status	5 - Production/Stable
Intended Audience	End Users/Desktop
License	Other/Proprietary License
Natural Language	English
Operating System	Windows
Sugar Edition	Sugar Community Edition, Sugar Enterprise, Sugar Professional



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Here is a partial list of supported formats by category.

## CRM SYSTEMS



## APPLICANT TRACING SYSTEMS





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## ADDITIONAL TARGETS





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## Workflow/compatibility attributes as it relates to user experience

	Basic compatible	Indirect integration	Indirect mapped	Direct integration	Seamless integration	Transparent integration	Embedded integration
<b>Negative Attributes</b>							
Data entry mistakes	X						
Loss of efficiency	X						
Usage apathy	X	X	X				
Manual Authentication				X	X		
MAP file required			X				
<b>Positive Attributes</b>							
Data tagging			X	X	X	X	X
Controlled data tagging				X	X	X	X
Data normalization					X	X	X
Deduplication					X	X	X
Automatic Authentication						X	X
Asynchronous communication					X	X	X
Application transparency						X	X
Administratively controlled					X	X	X
API connectivity					X	X	X
Single installation							X
Single vendor contact							X

Table 2 – Compatibility relating to user experience



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## Advantage 7: Multi-platform

Every device and platform is different. With that in mind, Broadlook developed Contact Capture to have a similar look and feel across all devices and platforms. If you have used Contact Capture on the iPhone, you already know how to use it on an Android or Windows Mobile device.

### Desktop

The desktop version of Contact Capture can be downloaded here:

<http://contactcapture.com>

### Mobile

Contact Capture runs on all major smart phone platforms. Contact Capture can be downloaded right on your phone at <http://www.broadlookmobile.com>





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## Web Widgets

Contact Capture works in web based portals. Below is an example of Contact Capture working in iGoogle as a widget.

## iGoogle Widget



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## CRM Implementations

Contact Capture works with popular CRM systems such as Salesforce.com, Microsoft Dynamics, SugarCRM and many more.

### Contact Capture in a web-based CRM (Microsoft Dynamics)

Microsoft Dynamics CRM

New Activity ▾ New Record ▾ Go To ▾ Tools ▾ RSS ▾ Advanced Find

**Broadlook Tools**

- Contact Capture for CRM
- Contact Capture for CRM
- Contact Capture Video ...

**Profiler for CRM**

- Profiler Plans
- Profiler Companies
- Profiler Leads
- Profiler Administration
- Profiler Video Tutorial

**Broadmail for CRM**

- Accounts
- Messages
- Events

**Extensions**

- Email Providers

**Workplace**

**Contact Capture for CRM**

**CONTACT CAPTURE**  
powered by **broadlook**

Capture! Save Clear

**Captured 2 contacts**

Contact filters: Name Title Company Address Email Phone

**Veronica Smith**  
CFO  
907-555-2177  
Arctic Compression Labs, Inc.  
[vsmith@example.com](mailto:vsmith@example.com)

**Shelba Vilar**  
Director of HR  
800-555-5677  
Adobe Auto Body

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# CONTACT CAPTURE

## Advantage 8: ROI

The desktop version of Contact Capture is free for end-users directly from Broadlook. In addition, through partnership with Broadlook, CRM and ATS vendors are empowered to provide their users with customized versions of Contact Capture what works specifically with their offering.

Contact Capture ROI. This spreadsheet makes a conservative estimate of 10 contacts per day and two minutes per contact to manually enter the information into a CRM. Towards the end of a work day, the average time to enter contact information trends toward 3-4 minutes due to fatigue as well as added distractions.

## Sales team ROI implementing Contact Capture for 1 year

	Sales admin	Junior Rep	Senior Rep
Annual compensation*	\$34,137	\$55,044	\$75,998
Percent of sales team	5%	60%	35%
Contacts entered per day**	17	11	5
Minutes to enter 1 contact	2	2	2
Minutes spent per day	34	22	10
Hours spent per week	2.83	1.83	0.83
Work weeks per year	48	48	48
Weeks spent per year	3.40	2.20	1.00
Percent of year spent	7.08%	4.58%	2.08%
Data entry cost per year	\$2,418	\$2,523	\$1,583

Environment	Team size	Team cost breakdown***			Team ROI
		Sales admin	Junior Rep	Senior Rep	
Individual	1			\$1,583	\$1,583
Workgroup	3	\$2,418	\$2,523	\$1,583	\$6,524
Small team	10	\$1,209	\$15,137	\$5,542	\$21,888
Medium team	25	\$3,023	\$37,843	\$13,854	\$54,719
Large team	100	\$12,090	\$151,371	\$188,412	\$351,873
National team	500	\$60,451	\$756,855	\$277,076	\$1,094,382

\*Data from Salary.com, Jan 2010. |

Median of national average used for "Sales Assistant", "Sales Rep 1", "Sales Rep 3"



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\*\*Data from two polls in Broadlook Technologies webinars.

Poll 1 *"Are you a sales admin, junior rep, senior rep or other?"*

Poll 2: *"How many contacts per day do you come across that you should enter into your CRM?"*

Numbers used in calculation are calculated at the 50 percentile of all respondents

\*\*\*Assumes team is 5% sales admin, 60% junior reps and 35% senior reps

The ROI calculation does not secondary productivity gains from:

- Massive reduction of data entry errors
- Duplicate reduction via controlled data entry method (data normalization)
- CRM data completeness (no skipped data entry)
- Ability to quickly and easily code contact sources
- Ability to report accurate metrics, based on quality and completeness



# CONTACT CAPTURE

## Advantage 9: Industry Leadership

Since 2003 and the release of Contact Capture, Broadlook Technologies has been the technology industry leader in contact information parsing. Since then, Broadlook has continued to innovate and expand. Today, Broadlook is the world lead in Internet data mining for Business to Business sales, marketing, recruitment and business intelligence.

Industry firsts:

- First parser to tackle both single and multiple contacts in the same interface
- First program to add pre-parsing capabilities for cleansing data
- First company to provide a SaaS licensing model for contact information parsing
- First company to have over 25 integration targets
- First contact parsing technology to be licensed and embedded inside an Applicant Tracking System
- First company to offer a free parsing application for desktop users
- First company to define, standardize, parse and openly publish schemas for new venues of contact information including social networks, VOIP, blogs, SMS, IM networks
- First company to have over 50 integration targets
- First parser solution for Microsoft CRM
- First contact information parser framework to add a OPEN plug-in architecture
- First parser solution for iPhone
- First parser solution for Palm Pre
- First parser solution for Windows Mobile



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## Summary

Contact information is the “life blood” of sales, marketing, business development and recruitment. It is basic axiom of good business practice that contact information plays this vital role. However, the reality is that most organizations have drastically reduced effectiveness due to the haphazard way that contact information is introduced and handled.

The key to success in handling contact information is three-fold:

- Determine an organization plan for the entry and handling of contact information
- Remove the human-error element from the entry of contact information
- Use an automation tool to standardize, enforce and facilitate the entry of contact information

In order to select the best, it is recommended that the solution be reviewed using the nine key criteria:

1. Ease of use
2. Accuracy
3. Speed
4. Normalization
5. Extensibility
6. Workflow
7. Multi-platform
8. ROI
9. Industry leadership

Using these criteria, Broadlook’s Contact Capture is the clear choice.

To find out more about how you can take advantage of Contact Capture for your organization and clients, contact Broadlook Technologies at 877-977-8080. [www.ContactCapture.com](http://www.ContactCapture.com)