Discovery Data

DISCOVERY DATA MARKETLINK
FOR SALESFORCE

Audience Criteria

For salesforce.com Administrators

TABLE OF CONTENTS

Overview

Discovery Data MarketLink for Salesforce allows you to populate new BD and RIA firm and rep records in Salesforce using Audience Criteria. Once your criteria is set any firms and reps Discovery Data has that meet your criteria and are not linked already in your CRM system can be added to Salesforce.

Prepare for your target market.

To help you reach your target market, Discovery Data has compiled this Audience Criteria checklist. Please note, reviewing the New Firms and New Reps section of the MarketLink for Salesforce Admin Guide is a prerequisite to setting up Audience Criteria.

- [ ] **DID YOU HAVE A KICK-OFF CALL WITH DISCOVERY DATA TO DISCUSS AND CREATE YOUR TARGET MARKET?**

Before you set up your Audience Criteria it is imperative that you have a call with Discovery Data to discuss your target market and how we can help you select the criteria in Discovery Data and Salesforce. On this call we will cover which combination of filters is best for you, how to avoid duplicate records, and incorporate AND and OR commands correctly.

- [ ] **HAVE YOU RUN AN INITIAL SYNCHRONIZATION JOB?**

A Synchronization Job needs to have been run at least once prior to creating Audience Criteria to ensure you have linked your Salesforce records to Discovery Data. Otherwise, the potential to create duplicate records in Salesforce is much greater. It is recommended you run the Synchronization Job right before you create and save your Audience Criteria to capture any unlinked records.

> **TIP**: Changes to Audience Criteria cannot be made while the Synchronization Job is running. If you make updates to your criteria, they will be used the next time the job runs.

- [ ] **IF YOU HAVE MULTIPLE SALESFORCE ADMINISTRATORS, IS EVERYONE AWARE OF AUDIENCE CRITERIA AND HAVE YOU AGREED ON YOUR TARGET MARKET?**

Audience Criteria is an organization-wide setting. If your company has multiple Salesforce Administrators in one instance, you need to work closely together along with Discovery Data to determine the correct filters for your target market and ensure that all applicable firms and reps are being sent for review.

AUDIENCE CRITERIA CHECKLIST

MARKETLINK FOR SALESFORCE AUDIENCE CRITERIA

IF YOUR AUDIENCE INCLUDES BOTH BD AND RIA, DO YOU KNOW HOW TO BEST AVOID CREATING DUPLICATE RECORDS?

Thousands of practicing advisors are associated with an independent corporate platform, such as LPL Financial, and at the same time are associated with a non-affiliated RIA firm. Discovery Data can help you avoid bringing an advisor into your CRM system multiple times.

DID YOU SCHEDULE A MEETING TO CREATE YOUR AUDIENCE CRITERIA WITH DISCOVERY DATA IN THE SANDBOX?

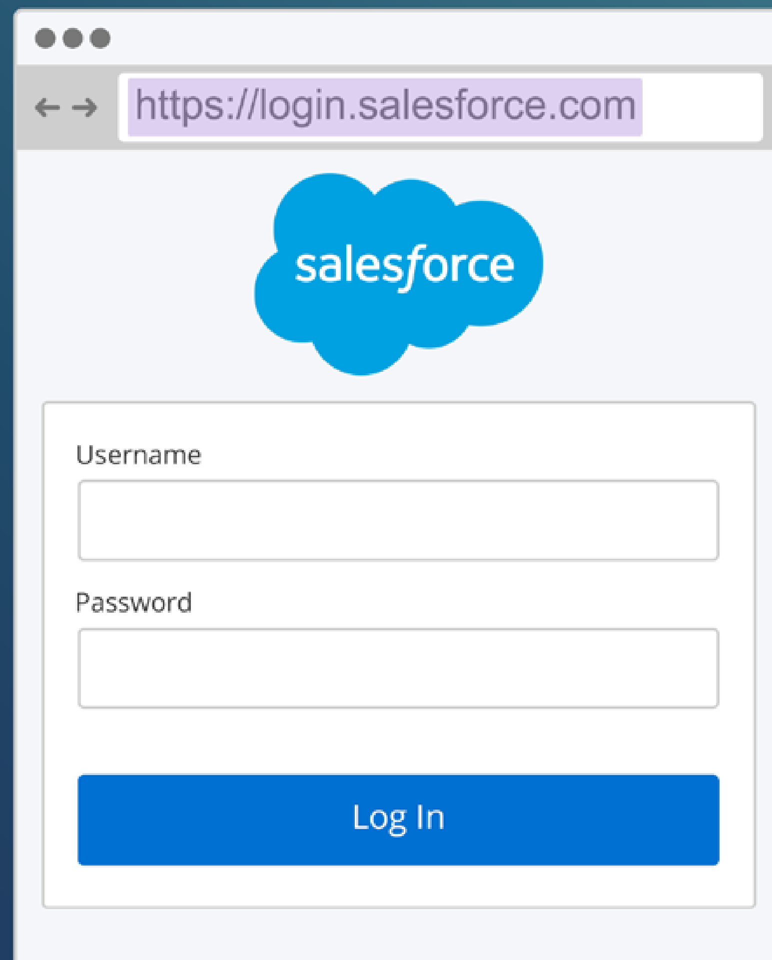
Another recommendation high on our list is setting up and testing your Audience Criteria in your Salesforce sandbox. This testing environment is the place for trial and error. Schedule a call with Discovery Data so we can create your Audience Criteria together on a live web meeting.

DO YOU HAVE A PLAN IN PLACE TO REVIEW AND ADD OR REJECT NEW FIRMS AND REPS?

In many cases new firms and reps are not added to Salesforce automatically. They require review and an action taken by the administrator to either add them as a new Account, Contact, or Lead, or reject them if you so choose. If you have a broad Audience Criteria and/or your target market does not exist yet in Salesforce, this will take a good amount of time to manually accept or reject. In these cases, it may be best to import a Discovery Data file into Salesforce to initially populate or update your target market rather than through MarketLink for Salesforce. If you decide to proceed via MarketLink for Salesforce you should have a point person designated ahead of time, so they stay on top of your Audience Criteria every week and make the correct decisions for your business.

IS THERE A MEETING SCHEDULED TO IMPLEMENT AUDIENCE CRITERIA IN PRODUCTION WITH DISCOVERY DATA?

After you create your Audience Criteria with Discovery Data and confirm the correct firms and reps are within your target market, schedule a call with Discovery Data to implement your Audience Criteria together in your Salesforce production environment. On a live web meeting we will ensure your first Synchronization Job has run properly and everything is in place to send new records before implementing Audience Criteria.



10 Audience Criteria tips and best practices.

MarketLink for Salesforce Audience Criteria is a very powerful tool to help you populate and maintain your target market in an automated fashion. To make sure you take full advantage of this resource and receive the desired results, consider the following tips and best practices.

1. BE COMFORTABLE WITH YOUR DISCOVERY DATA MAPPING BEFORE SETTING UP AUDIENCE CRITERIA

When you add new firms and reps from your Audience Criteria, the data that will populate on a new record will follow your Discovery Data Mapping, so you want to make sure you are comfortable with the current mapping you have in place.

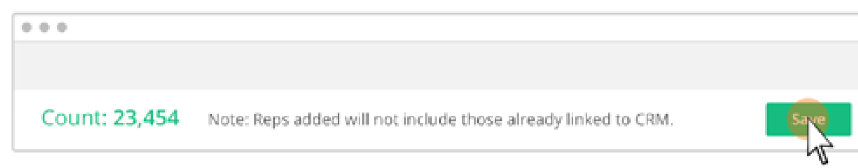
2. SET SPECIFIC CRITERIA PER AUDIENCE

You are able to set completely different criteria for each of the four search screens since the filters work independently, but be careful. Between both BD and both RIA search screens you should use common filters such as firm type to prevent audience discrepancies. For instance, if you have set your criteria to be wirehouse on BD Firms, the same filter should be used on BD Reps or you will not get the associated reps.

TIP: You can use your saved searches in MarketPro to create your Audience Criteria. Scroll down the search screen to Saved Searches and select ⊕ In Search.

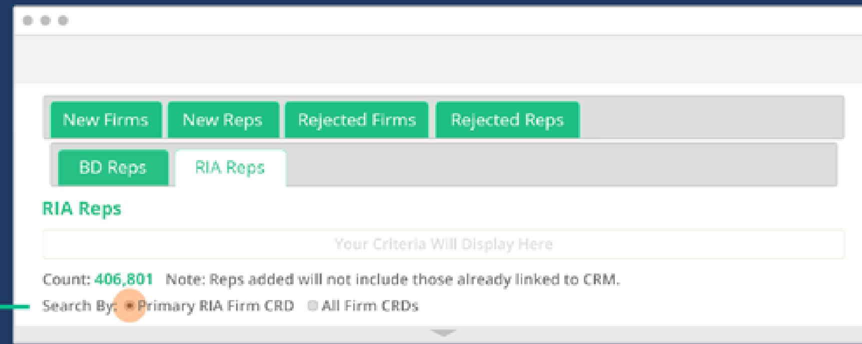
3. PRESS SAVE AFTER COMPLETING YOUR AUDIENCE CRITERIA

To set your criteria, you must press Save for each search screen from which you want new records. You must have at least one filter in order to save the criteria. Clicking the Save button is what activates your Audience Criteria. If you mistakenly press Save or no longer want to receive new firms or reps from all or certain tabs, type None in the Copy & Paste pop-up window for City and press OK.



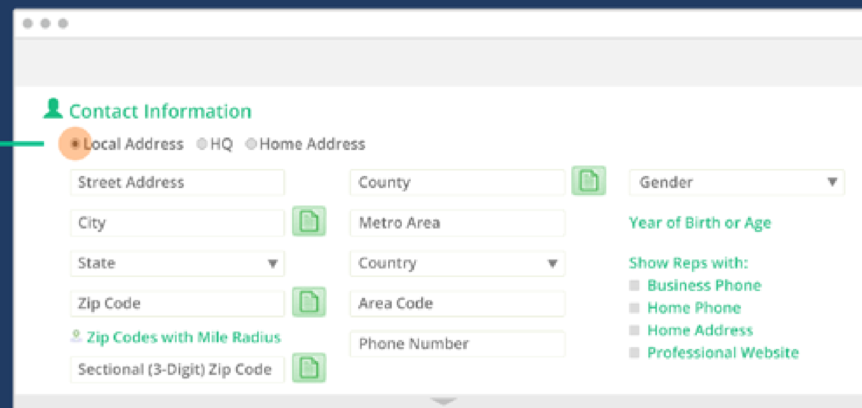
4. SEARCH BY PRIMARY FIRM CRD UNLESS YOU WANT DUPLICATE RECORDS FOR REPS ASSOCIATED WITH MULTIPLE FIRMS

On the BD Reps and RIA Reps search screens you have the option to search by Primary Firm CRD or All Firm CRDs. By default Primary Firm CRD is selected to help prevent duplicate records in Salesforce. If you switch the radio button to All Firm CRDs your Audience Criteria will include multiple records for the same rep if the rep is associated with multiple firms.



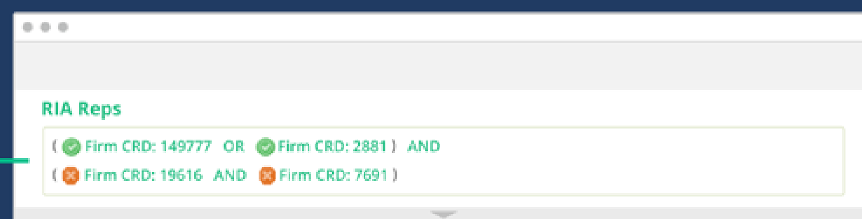
5. SELECT THE CORRECT ADDRESS RADIO BUTTON IF YOUR CRITERIA INCLUDES GEOGRAPHY

If your Audience Criteria includes geographical restrictions, keep the default selection Local Address on RIA Reps.



6. USE AND/OR COMMANDS TO INCLUDE OR EXCLUDE CERTAIN FIRMS

To include or exclude specific firms, use the Firm CRD filter. An OR command should be between each Firm CRD in the criteria if you want to include multiple firms. An AND command should be between each Firm CRD in the criteria if you want to exclude multiple firms. This criteria functionality is one tool for which you will be best served to engage Discovery Data for initial creation of your target market.

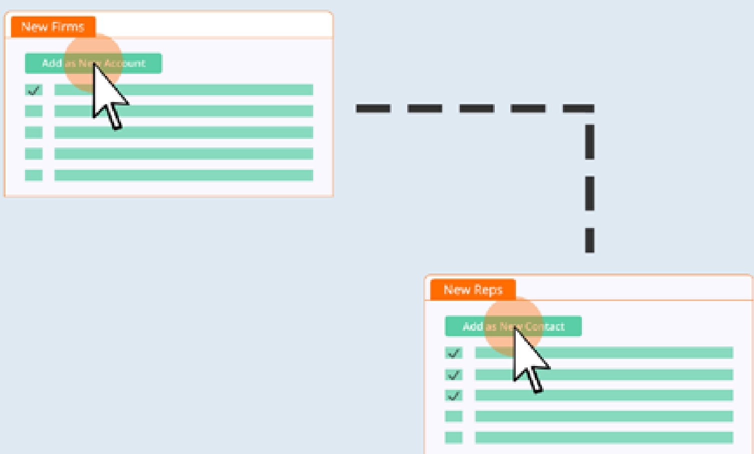


7. TRIPLE CHECK YOUR AUDIENCE CRITERIA BEFORE YOU RUN THE NEXT SYNCHRONIZATION JOB

Each Audience Criteria search screen includes a count of all records that meet your criteria that are not already linked in Salesforce to Discovery Data. This count will increase or decrease as you add and remove filters. All firms and reps that meet your criteria and do not already exist as linked records will be listed in New Firms and New Reps. After the initial run, records that have been added to Discovery Data meeting your criteria will be presented for review, as will existing records in Discovery Data that have a recent data update that results in them now meeting your criteria.

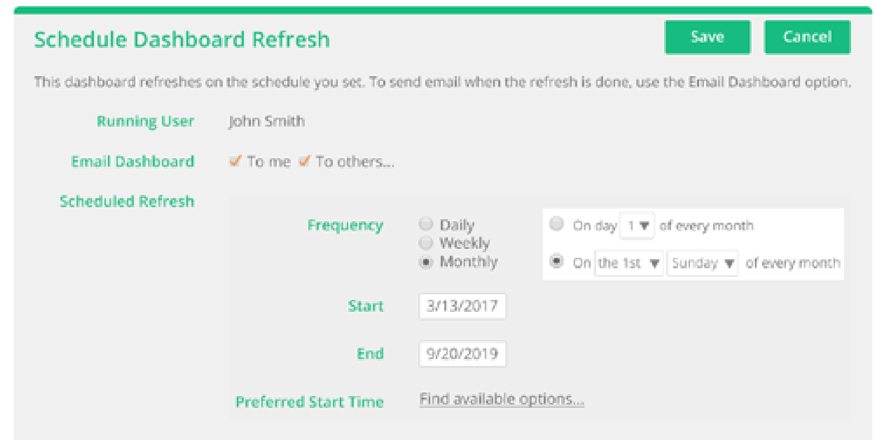
8. ADDING NEW REPS AS CONTACTS MAY CREATE NEW ACCOUNTS IN SALESFORCE

When new reps are added from Discovery Data, associated new firms will be added as well if they do not already exist in Salesforce. By accepting New Reps as Contacts, you may also be creating new Accounts if we have not determined there is an existing Account with the correct Firm CRD/Branch ID. This may result in duplicates. To help prevent this from happening, make sure your CRM system is fully populated with CRD/ID field(s) and review New Firms before going to New Reps to add new Contacts.



9. CUSTOMIZE AND SCHEDULE THE DISCOVERY DATA FIRM AND REP PIPELINE DASHBOARD TO EMAIL YOU AND YOUR TEAM AUTOMATICALLY

Go to Dashboards in Salesforce and select the Discovery Data Firm and Rep Pipeline dashboard from the drop down menu. Click the arrow next to the Refresh button and select Schedule Refresh. Select who you want to send this dashboard to along with the frequency, start and end dates and preferred start time, and then click Save.



10. DISCUSS ANY AUDIENCE CRITERIA UPDATES WITH DISCOVERY DATA

If your target market changes (for example, if you have a new selling agreement) and that change will result in a significant amount of new firms and reps in your target market, contact Discovery Data before updating your Audience Criteria. It may be best to import a file of these new records. Discovery Data can then work with you to update your Audience Criteria so that any firms or reps that change to fit your criteria moving forward are being sent for review.

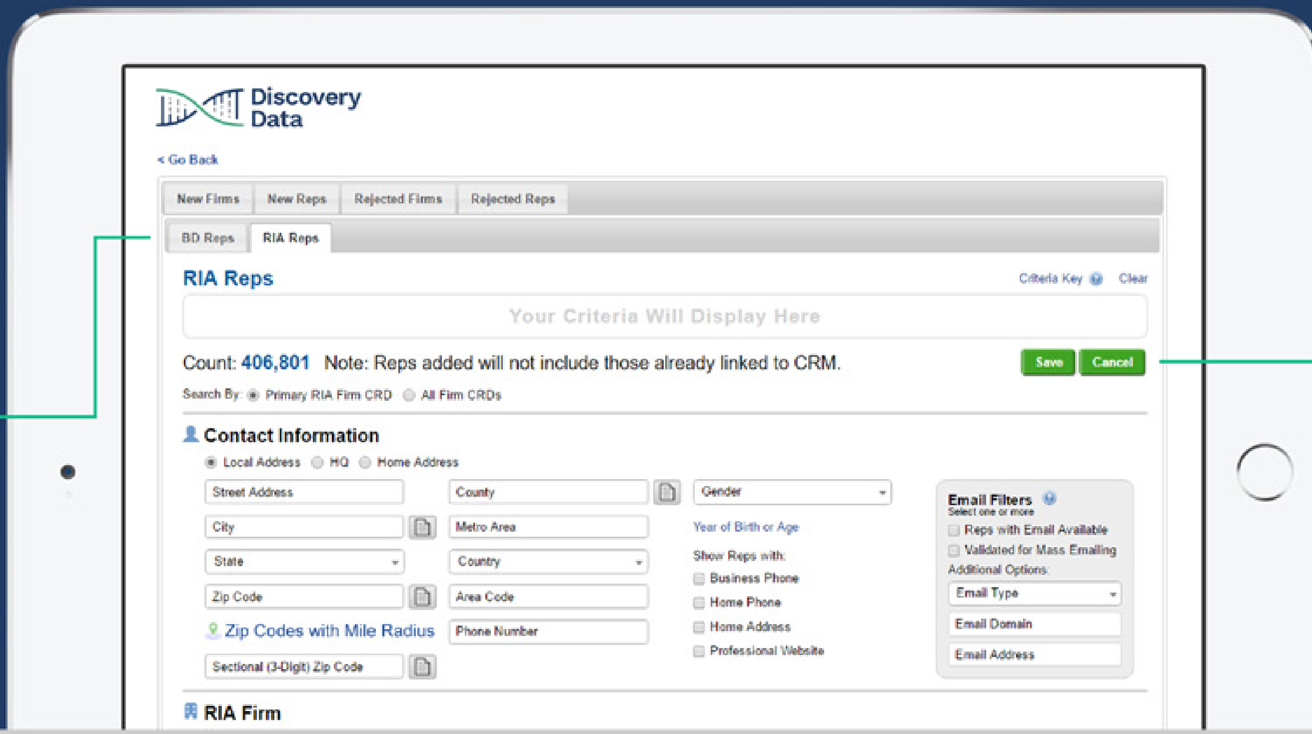
SETTINGS

MARKETLINK FOR SALESFORCE AUDIENCE CRITERIA

Complete your Audience Criteria.

1. Go to Discovery Data Mapping.
2. Click the View New Records button.
3. Click New Firms or New Reps.

4 Navigate to the Audience Criteria button and select your filters from the BD and RIA search screens. Skip the search screens that do not apply to



5 Click Save. Select one of the two options on the pop-up window that displays then click OK.

RIA FIRMS

Select from **over 35,000** investment advisory firms.

BD FIRMS

Search on **all 4,000** broker-dealer firms.

RIA REPS

Narrow down your audience from **over 400,000** RIA reps.

BD REPS

Access **over 625,000** BD reps available to target.

Discovery Data is the leading provider of data, insights, and analytics on the firms and people driving the financial services and insurance industries across North America. The top asset and wealth management, fintech, media, consulting, and insurance companies turn to Discovery Data to improve their business performance.