

# How To Develop A Data Strategy

## Summary

Before loading data to the D&B CDP, it's important to think about your data strategy to ensure the right data is ingested. Read through this guide to learn more about developing a data strategy. Then fill out the last two pages of this guide with your organization's information.

## Create A System Catalog

Create a system catalog that identifies all the systems and objects within your organization that contain data about customers and prospects that you would like to ingest into the CDP.

The CDP supports objects like Accounts, Contacts, Product Purchases, Product Bundles, Marketing Activities and more. Refer to the [Rev.Up ABX documentation](#) for a full list of supported objects.

An example of a system catalog for an organization that has Salesforce, Marketo and Oracle is below:

System Name	System Type	System Object	CDP Object
Salesforce	CRM	Accounts	Accounts
Salesforce	CRM	Contacts	Contacts
Salesforce	CRM	Leads	Contacts Accounts*
Marketo	MAP	Leads	Contacts Accounts*
Oracle	ERP	Orders	Product Purchases

*\*If no matching account is found, a new account is created.*

## Define System Priority

It is not uncommon for multiple systems to have the same field. Defining a system priority allows you to have the data from your most trusted source visible in the CDP.

An example of system priority for an organization that has Salesforce, Marketo and Oracle is below:

Priority	System Name
1	Salesforce
2	Oracle
3	Marketo

## Catalog System IDs

Cataloging the relationship between systems helps the CDP match data across systems to create the customer master.

Catalog two types of system IDs:

- **Unique ID (or primary key):**A field that helps uniquely identify a record within an object.
- **Match ID (or foreign key):**Additional IDs that can help connect the data from one record to another.

An example of a system ID catalog for an organization that has Salesforce, Marketo and Oracle is below:

System Name	System Object	CDP Object	Matching Approach	ID Type	ID Field Name	Matching System And Object
Salesforce	Accounts	Accounts	System IDs	Unique ID (Primary Key)	Id	
				Match ID (Foreign Key)	ERP ID	Oracle Orders
Salesforce	Contacts	Contacts	System IDs	Unique ID (Primary Key)	Id	
				Match ID (Primary Key)	Account Id	Salesforce Accounts
Salesforce	Leads	Contacts	Match Attributes	Unique ID (Primary Key)	Id	
Marketo	Leads	Contacts	Match Attributes	Unique ID (Primary Key)	Id	
Oracle	Orders	Product Purchases	System IDs	Unique ID (Primary Key)	Order Id	

## Catalog Match Attributes

Match attributes are standard fields from objects that can help uniquely identify records even in the absence of a unique ID. Match attributes are also used for matching accounts to the D&B Data Cloud.

The following match attributes are accepted for accounts and contacts:

CDP Object	Match Attributes
Accounts	D-U-N-S, Account Name, Website, Country, State, City, Postal Code
Contacts	First Name, Last Name, Phone Number, Email, Account Information

An example of a match attribute catalog for an organization that has Salesforce, Marketo and Oracle is below:

System Name	System Object	Match Attributes
Salesforce	Accounts	DUNS, Account Name, Website, Country
Salesforce	Contacts	First Name, Last Name, Phone Number, Email, Account Information
Salesforce	Leads	Email, Phone Number
Marketo	Leads	First Name, Last Name, Phone Number, Email
Oracle	Orders	N/A

Please fill out the next two pages with your organization's information.

### System Catalog

System Name	System Type	System Object	CDP Object

### System Priority

Priority	System Name
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

System IDs

System Name	System Object	CDP Object	Matching Approach	ID Type	ID Field Name	Matching System And Object

Match Attributes

System Name	System Object	Match Attributes