ORACLE CRM ON DEMAND DATA IMPORT WORKSHOP

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CRM ON DEMAND

THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use
- Fast to deploy
- Powerful analytics
- Built-in contact center
- Prebuilt industry solutions
- Embedded marketing, sales, and service best practices

Sales and service data, such as account and contact information, is the backbone of your organization. Your business depends on the data being complete and accurate. The Oracle CRM On Demand Data Import Workshop teaches your key personnel how to ensure that your data imports are successful, both during the implementation of CRM On Demand and on an ongoing basis.

Minimize loss of time

CRM On Demand is designed to drive success in sales, marketing, and services, delivering value to organizations of all types and sizes. For that success to happen as soon as the product is rolled out, employees need to find the legacy data properly imported and ready for use. The Oracle CRM On Demand Data Import Workshop provides instruction on preparing your organization's data so that no time is lost in the transition to CRM On Demand.

With data properly imported, you will minimize the time consuming data validation process, your sales force will not worry about re-keying account information, your customer service staff will maintain access to all customer records, and everybody will gain faster access to new CRM functionality.

Maximize user adoption

Getting deployments off on the right foot is critical to create momentum, encourage end-user adoption, and rapidly benefit from CRM On Demand. Making sure that your legacy data is imported correctly is a critical preliminary step in a successful implementation.

Make the right choice for your imports

Whether you're implementing CRM On Demand or importing to update the existing data, you need to have import options that meet your company's data needs. The course focuses on using the in-application Import Assistant, but the course also expands on using the Import Assistant in tandem with the command-line tool, Oracle Data Loader On Demand. The course also discusses the more complex and advanced Web Services, and it addresses when each import tool should be used.

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KEY TOPICS

- Understanding import requirements
- Formatting import files and data
- Eliminating duplicate records
- Linking records during import
- Using the import assistant
- Troubleshooting and correcting errors
- Reimporting records
- Tips and best practices

RELATED TRAINING AND SERVICES:

STANDARD TRAINING FREE WITH EVERY SUBSCRIPTION

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- Webinars
- Administrator roll out guide

PUBLIC TRAINING

- Administration essentials workshop
- Advanced analytics workshop

CUSTOM TRAINING

- Web training
- On-site training
- Train-the-Trainer

RELATED SERVICES

- Implementation assessment
- Rapid setup
- Rapid results
- Guided implementation

Understand import requirements

The Data Import Workshop reinforces the fundamentals about the application that importers need to understand—special requirements based on record types, field types, and file size. Without that fundamental understanding, importers will waste time re-importing while end users might spend hours cleaning up records or, even worse, basing their work on inaccurate or incomplete data.

Prepare source data

Importers also need to understand the errors that can occur when importing without the proper preparation. Through a series of practice exercises, students learn the essentials for cleansing and preparing data, such as consolidating duplicate records, determining gaps in data that can result in partial or failed imports, and importing linked records. Additionally, students practice shortcuts for cleansing data using a spreadsheet application—tips compiled by CRM On Demand import experts.

Practice using the import assistant

Learning by doing, students work through carefully constructed practice exercises, gaining the necessary experience to minimize rework when they perform these tasks at their own organizations. The exercises reinforce the best practices presented throughout the Data Import Workshop, developing the students' skills in a safe environment with instructor support.

Troubleshoot errors

After each import, CRM On Demand generates a log file as well as an email that notifies the importer of the results. Again, the practices in the Data Import Workshop provide real-life scenarios that force importers to analyze errors that can occur without proper preparation.

Re-import records

Completing the entire import process, the Data Import Workshop teaches students when and how to re-import data to capture data dropped during the initial import. From start to finish in the course, students learn, practice, and refine their skills!

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