

CASE STUDY

Clear Capital reduces data cleansing workflows from hours to minutes with Validity DemandTools and BriteVerify.





Clear Capital is a national real estate valuation technology company.

Since Clear Capital was founded in the mountain town of Truckee, California in 2001, the company has pioneered simple, web-based valuation technology solutions to empower the mortgage industry to transition away from paper and into the modern era. Their field valuation services, property data and analytics tools, and collateral review platform technologies provide customers with a complete understanding of nearly every US property.

The challenge:

Cleaning a database riddled with duplicates and unstandardized records—while establishing clear, repeatable data management workflows.

Clear Capital is a national real estate valuation technology company headquartered in Reno, Nevada.

Customer relationship management (CRM) data forms the backbone of Clear Capital's interactions with its customers and prospects. This data impacts everything from customer satisfaction to executive decision-making and overall business success.

"We are very committed to having appropriate, correct, and extremely clean data to make sure we've captured all potential customers," said Lisa Foster, Business Systems Administrator at Clear Capital. "Even more importantly, we keep our existing customer data clean so we can communicate with them as expected."

However, before Foster joined the organization, Clear Capital's Salesforce instance had hundreds of users who, in some cases, were free to enter information at will. This led to duplicates, unstandardized data, and records that were missing information.

As a result, Foster inherited a database in dire need of attention when she joined the team at Clear Capital. "We had a brand-new database and had brought data in from multiple internal sources," she recalled. "None of it was clean and it was repeated across several internal homegrown databases." As Foster explains it, a database with quality issues can cause major ripple effects across a company's various internal departments.

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Lisa Foster

Business Systems Administrator at Clear Capital

“Our presence might look unprofessional. We may not get our intended messages across. There are so many outcomes that could not be favorable if we didn't have clean data,” said Foster.

Unfortunately, before Foster arrived, this data had all been added to Salesforce in one lump, without being cleaned.

At this critical moment, the company implemented DemandTools, the secure data management platform from Validity.

The solution:

Continuous data hygiene efforts powered by Validity DemandTools and BriteVerify.

Foster had used DemandTools for over 20 years in previous roles and always attempted to bring it with her when she changed jobs.

“Usually, it's easy to make an ROI case for DemandTools,” said Foster. “I explain that if we don't have our admins spending all these hours per week cleansing data, they'll be able to do X, Y, and Z instead.”

She knew firsthand just how powerful the solution could be: “One particular group I worked with in the past had a team of 3-4 admins, who had been working on a data cleaning project for several months before we stepped in,” Foster recalled. “I introduced them to DemandTools and were able to finish in half a day what had taken them six months to do until that date.”

After onboarding DemandTools at Clear Capital, Foster and her team immediately began the process of cleansing and checking their data. “My first step is always to clean the data, meaning deduplicating and standardizing records,” she explained.

Foster used the DemandTools Import module to cleanly add records to Salesforce as they came in through sales and marketing outreach—particularly large import jobs. She also used the platform's built-in standardization formulas to reduce pre-import data preparation.

Foster also used DemandTools' Match and Dedupe functionality to identify and merge duplicates between external data sources and Salesforce before importing data, so only new records were created and existing records were updated.

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I appreciate that DemandTools isn't a set-in-stone solution—the effort is always being made to innovate and bring the product forward. I love seeing new releases come out and learning what new things I can play with.

Lisa Foster

Business Systems Administrator at
Clear Capital

“I've encountered other data quality tools, but they don't offer everything that DemandTools does,” said Foster. “You'd have to use two or three tools to accomplish the same thing.”

To further protect Clear Capital's data quality, Foster used Validity BriteVerify—the industry's longest-running contact verification solution. “Sales and marketing love it because it helps them target,” said Foster. As she explained, these teams use the statuses BriteVerify supplies for each email address (valid, unknown, and risky) to guide how they treat each contact.

“If we have hundreds of contacts for a certain company, we can identify who we should be mailing to and eliminate the email addresses that we identify as risky.” According to Foster, data maintenance is never a one-and-done effort. “Even if you have a clean database, you're constantly loading it—and I'm using DemandTools and BriteVerify to keep it clean.”

The results:

Less time spent on data management and more effective sales and marketing outreach.

With DemandTools and BriteVerify in their arsenal, Foster and Clear Capital realized significant productivity gains.

“Just while we've been chatting on this call, I've had DemandTools running in the background and I've updated 70,000 contacts,” said Foster. “Without it, I would've had to go in manually and check each box. You can imagine how many hours I just saved!”

Performing this same exercise without DemandTools would be a much different story. Assuming that doing this manually might take a minute per record, an admin like Lisa would need to spend approximately 30 working weeks to finish the job.

This wasn't the only instance in which DemandTools reduced the time Clear Capital spent on regular data management workflows from hours or days to mere minutes.

“After I had taken some time off from Clear Capital, two colleagues who had assumed admin responsibilities were working with a dataset that had all account

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Lisa Foster

Business Systems Administrator at
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names capitalized. They had been standardizing each of the 5,000 accounts manually—a huge project,” she recalled. “I came back five minutes later, and had it done with DemandTools.”

“I got to be a great wizard until I told them how I did it,” she said. “After that, there were two new DemandTools lovers!”

With a duplicate-free database courtesy of DemandTools, Clear Capital avoided allocating multiple sales representatives to chase down the same leads, and let them focus their energy on real opportunities only.

But according to Foster, the benefits of DemandTools extend far beyond the hard numbers. “It's a morale booster for employees as well,” she explained. “Users don't have a heavy lift to maintain the system. They can save all the scenarios they need and go 'click and done' each month.”

These data hygiene efforts also helped boost the efficacy of Clear Capital's sales and marketing outreach.

Using BriteVerify, Clear Capital ensured their sales and marketing campaigns only targeted real people—not invalid contacts. The platform helped Clear Capital avoid ending up on any email blocklists that might have otherwise severely limited their campaign deliverability.

When asked for any final commentary, Foster's advice for other CRM admins was simple: “DemandTools is the first app I open when I wake up every morning,” she said. “Don't think about it, just get it.”