

Resources - Database Design System

Why Access CRM Database Resource?

Access CRM management has spent over 35 years in data collection, manipulation and database experience.

We are familiar with all facets of data management.

We have the ability to source out additional data to enhance your existing records and to acquire new prospects. We create profiles from various indexes, which are then matched against your existing prospects.

We design databases with current and anticipated communication needs in mind, using fully scalable architecture optimized for speed and accuracy. As your business grows, demands on your database will be greater.

Our design will ensure that your database performs optimally at all times.

Our technology is updated regularly to current industry standards and functions optimally at all performance levels – from the most basic to the most sophisticated tasks.

Database Design

Before designing a database, Access CRM meets with clients to better understand their existing data infrastructure, and to determine how well it serves current needs and whether it can support future goals. We determine what existing and additional data is needed, and what data exists but is not used. We work with the clients to determine what reports they will need to make decisions, the types of programs the technology must support and anticipated needs as the business grows.

We then design, build and maintain a marketing database that gives clients the ability to use data optimally for making business decisions and managing programs – from customer acquisition to retention. The infrastructure is fully scalable, flexible and can be designed, tested and deployed in approximately two weeks.

Expandability

The ability to expand your database and add new fields when necessary is an integral part of the database design. Access CRM's database architecture is specifically designed to grow. Extensive reworking is not required to successfully merge with another database or add new types of data.

Data Collection

Access CRM specializes in finding the efficient ways to populate your database with relevant records and overlays. Our Data Collection Resource provides clients with essential data services such as:

- Data Entry – Access CRM keys in data using forms individually designed for each client to maximize data capture and minimize cost.

- **Batch Controls** – Our batch system guarantees accurate collection of data that is either keyed in or migrated. Each record is reconciled to batch specifications. Data automatically imported from batch-related tables maximizes accuracy and minimizes costs.
- **File Enhancements** – Access CRM databases are designed with interfaces that allow our clients to easily incorporate data from internal or external sources without manual keying. Merging databases, adding records and appending additional data is accomplished quickly and accurately
- **File Verification** – Access CRM cleans, edits and updates all data before populating the database. Data is compared to relevant internal and/or external files to verify accuracy. For example, we verify mailing data by comparing data against the postal databases. We confirm valid addresses, correct invalid addresses and eliminate undeliverable addresses. Mailings are then more efficient – maximizing delivery and minimizing costs.

For more information on Data Collection, please see Data Collection Resource

Output: Queries and Profiles

Access CRM has developed proprietary analytical reports in formats tailored to meet the needs of individual clients.

Queries – Multiple queries are used to extract segments from the database for use by management to make intelligent business decisions and develop effective marketing programs. We use a combination of Boolean selectors to extract a single count.

Profiles – A profile provides business and marketing managers with a snapshot of the database at any given time. The reports give clients the quantities of records per field, and identify strengths and weaknesses in each field against your defined marketing goals. Access CRM provides clients with profile reports on demand or after a significant update or annually. Reports can be delivered via disk or hard copy, or viewed online at our secure website.

For more information on Output, please see Output Resource.

Data Analysis, Mining, Modeling and Processing

Using database queries and regression programs clients can segment customer and prospect databases into clusters ranked from the most valuable to the least. This enables clients to determine the best communication plan (type, frequency) for each segment. By identifying the most profitable customer and prospect segments, clients can manage ROI.

We manipulate relevant criteria, such as demographics, formulas and customer or prospect attributes to create the ranking. We then export the minimum amount of data necessary for a successful analysis, which includes record IDs, to a regression analysis provider. Upon return of the results to us, they are immediately posted to the database and available for use. The enhanced ID tagged data makes it possible to act on the results immediately.

Multi-User Security

Access CRM has a variety of tools for clients to use to extract and view information. We set up customized interfaces, allowing multiple users to access and modify data simultaneously. Data can only be accessed by qualified AccessCRM staff and individuals authorized by you. Clients can specify individual permissions and general security levels to prevent unauthorized access.

Archiving

Access CRM will back up databases by daily, weekly or monthly – clients choose the cycle frequency they need. Annually we meet with clients to determine what data should be stored and what can be safely eliminated in preparation for long-term storage of critical data.

Technical Specifications: Software and Hardware

Access CRM develops proprietary solutions based on open source products.

Our applications, written primarily in CGI-Perl and mod-perl, query the MySQL open source databases using the SQL language. Because the applications are written using open source technologies, and run on an Apache web server, they are compatible with most hardware platforms and operating systems in current use.

Application output ranges from HTML and XML generation to automated email delivery or reports created in Microsoft Excel formatting. All technology is compatible with PC and Apple computers running common, modern operating systems such as Windows, MacOs and Linux.