

Enrich CRM and Automate Data Flows with SourceScrub

CRM - the Central Nervous System of Business Development

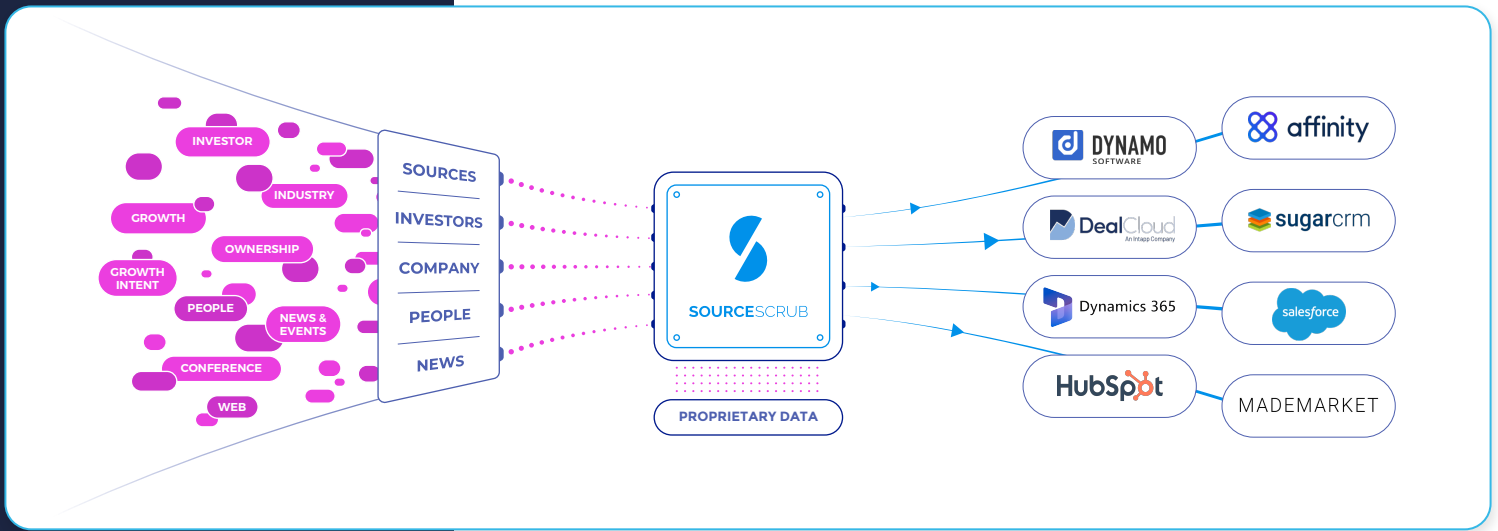
Nearly all dealmaking firms today use CRM to manage business development, but most CRM's fail to deliver on the promise of rich record keeping and optimized workflows. The problem is data housed in the CRM is limited, or inaccurate because people on the team fail to keep records up to date. Firms realize the full potential of their CRM when they're able to enrich records with critical data points such as growth rates, location, or industry, and when workflows are automated, so investors don't have to spend their time manually updating records.

SourceScrub CRM Integration – Optimizing CRM and Workflows

SourceScrub's CRM Integration is for dealmakers who rely on data to drive deal flow and accelerate business development operations. This solution enriches CRMs with robust company profiles, accurate contact details, and automates two-way data flow to ensure accuracy and completeness. This results in synchronized teams who leverage data to make investment decisions from the most comprehensive and accurate data.

1. With SourceScrub data synchronized with your CRM you can:

1. **Automate your workflow** to speed up processes and eliminate errors from manual data entry
2. **Create or append records** with the click of a button as you browse websites
3. **Enrich your CRM with accurate contact information** for key decision makers, company growth rates, employee counts, investors, latest funding round, ownership type, and more
4. **Filter lists of companies using labels** that tell you whether a company is already in your CRM, so you don't waste time checking in both systems
5. **See your CRM fields directly in SourceScrub**, so you don't waste time toggling between two systems
6. **Prioritize conferences and lists** based on companies you're already tracking in your CRM
7. **Rank potential investment targets** by integrating your CRM fields into a custom company score



CRM Enrichment Increases LFM's Pipeline, Productivity, and Connections

SourceScrub helped LFM Capital take a more iterative, agile approach to its sourcing strategy with the two-way CRM Integration. Katie, an investor at LFM, shares that "using SourceScrub to generate leads, research markets, and automatically enrich our CRM saves me 20 hours a week."

Case Study Highlights

143%

boost in direct contacts with executive-level titles

200%

increase in directly sourced opportunities

109%

faster direct deal sourcing

How It Works

SourceScrub's two-way integration makes it seamless for deal makers to leverage data and automate workflow to find and win more deals, faster.

- Enrich:**
 Automatically enrich all matched companies with SourceScrub data such as contact information of key decision makers, company growth rates, employee counts, job openings, investors, latest funding round, ownership type, and more.
- Automate:**
 Flag companies that are already in your CRM when working in SourceScrub. Add new records or update existing records in bulk with the click of a button.
- Customize:**
 The two-way integration makes it possible to see as much relevant information in your CRM and in SourceScrub. Users can select to view and filter by their CRM fields when working in SourceScrub and vice versa.
- Score:**
 Take your proprietary company ranking one step further by integrating your CRM fields into your SourceScrub custom company score.
- Prioritize:**
 SourceScrub's matching logic makes it easy to prioritize sources such as industry conferences and top lists. Filter for sources that have a higher density of companies you are already tracking in your CRM.