LeadAngel

DATA SHEET

FUZZY MATCH ALGORITHM

INTRODUCTION

When it comes to matching incoming marketing leads against CRM accounts a simple string match may be sufficient for some people, but is that enough?

What if you were told a thorough operation has to include taking out common legal company suffixes, handling special characters, and being able to identify acronyms and nicknames common in the business world? It also has to be able to recognize popular stock quotes, identify what entities have undergone mergers or acquisitions, and take into geographical sensitivity into account when matching leads. Wouldn't that be much better?

LEADANGELS'S FUZZY MATCH LOGIC

Over the years, LeadAngel has developed a state-of-the-art fuzzy match algorithm that is not only fast and accurate but also flexible to fit different needs. It's not a final formula; behind the scenes Machine Learning also allows LeadAngel to be able to improve that algorithm over time.

Fuzzy Matching accuracy is achieved by hundreds of matching rules and thousands of data points. The following are the key areas where rules have been implemented:

LEGAL SUFFIXES
Not all companies have the same names or backgrounds. However, company suffixes such as Inc., Corp., LLC, and

Ltd., etc. don't serve much purpose when it comes to matching searches. LeadAngel's algorithm makes sure these suffixes are ignored.

SPECIAL CHARACTERS
Special characters like "&" and "AND", "AT" and "@" are practically the same. LeadAngel's algorithm is designed to ignore these as well as other special characters like commas, periods, etc. Since company names can come in other languages you should expect to encounter accented characters like "é", "ê", "ç", "ñ" and "à". With LeadAngel's system, items like these are controlled in such a way to produce desired results.

ACRONYMS
Are IBM, I.B.M., and International Business Machines the same? In LeadAngel's search algorithm they will be. It is able to identify popular acronyms with or without spaces, with or without dots, etc. Are you looking for Ingvar Kamprad Elmtaryd Agunnaryd? That is actually shortened as IKEA. Dalsey, Hillblom and Lynn is more popularly known as DHL, just to name a few.

POPULAR NAMES
Not all big companies or businesses were previously known as they are called now. For example Quantum Computer Services is now called AOL, AuctionWeb is now called eBay, and the Marafuku Company is now called Nintendo. LeadAngel's algorithm will be able to recognize popular names and previous names companies went by.

WEB DOMAIN
Over the course of its operations, a business may put up new websites and abandon old ones several times. It

may even set up a domain to help direct customers to the right website. A record with a missing company name but valid business domain presents no problem to LeadAngel's match algorithm.

GEOGRAPHICAL SENSITIVITY

LeadAngel's match algorithm searches all over the world, but priority is given to geographically closer company location. So in case of multiple matches you don't have to worry about looking at results that are actually inaccessible to you, or located halfway around the world.

MERGERS AND ACQUISITIONS

Here's what happened earlier in 2017: Extreme recently bought Avaya's Networking Business Unit, Xerox recently bought MT Technologies, and Palo Alto Networks recently bought LightCyber. Are other algorithm systems familiar with business mergers that took place recently? LeadAngel's search algorithm will know what companies already merged with what, like Youtube with Google, and Taleo with Oracle, etc.

SPELLING VARIATIONS, NUMBERS

We live in a unique world, where we can occasionally spell the same word differently. Example, Color vs Colours. It is also possible to write 1 vs One. LeadAngel's extensive lookup and rules are designed to take care of it all.

TIE BREAKERS

There are times when an incoming record is matched against multiple master accounts. It could be due to duplicate in master records, or just the match ended that way. A little of pre-planning combined with LeadAngel's real-time tie breaking rules comes handy. Following tie-breaking rules are available out of box to select the winner

1. Account with most CRM contacts
2. Account with most CRM Leads
3. Account with most Opportunities
4. Oldest Account
5. Account with least contacts
6. Account with least leads
7. Account with least Opportunities
8. Newest Account

Rules above are presented in the priority order and priorities can be changed.

CONTROL THE "FUZZINESS"

Out of the box, LeadAngel offers three levels to control the fuzziness.

1. Strict – Matches on the exact name and or domain only
2. Moderate – Includes all the matches from strict mode, plus all other fuzzy matches except custom acronyms
3. Lenient - Includes all the matches from moderate mode, plus custom acronyms

830 Stewart Dr | Suite 228 | Sunnyvale, CA 94085
Telephone: +1 408-372-6077| info@LeadAngel.com

www.LeadAngel.com