



<b>CDP Institute Standard Use Case</b>	
<b>Name</b>	Lead to Account Match
<b>Problem</b>	Associate individuals with businesses in B2B data
<b>Solution</b>	Ingest data; apply rules and reference data to associate each individual with a business or department master ID.
<b>Benefits</b>	More accurate connection of individuals to business; more complete view of aggregated business level data
<b>KPIs</b>	Nbr matches found, % unmatched leads, % correct matches when verify
<b>Task 1</b>	Load and standardize lead and account data, using reference data
<b>Task 2</b>	Define and verify matching process
<b>Task 3</b>	Apply matching process, store account IDs on lead records
<b>Task 4</b>	Measure results
<b>Task 5</b>	
<b>Task 6</b>	
<b>Related Materials</b>	
<b>Tags:</b>	
• <b>Function</b>	Extract, Unify, Expose Data; Identity Resolution/Unification
• <b>Goal</b>	Awareness; Acquisition - Conversion; Grow Value; Retention
• <b>Feature</b>	Client-Built Data Load; End-User Data Load; Schema-Free Data Load; Persistent ID; Probabilistic Match; Golden Record; Account-level Data; Lead-to-Account Match; Direct Access; Cross-Campaign Arbitration