LexisNexis® InterAction®
Best Practices
Implementation Roles–Ongoing Maintenance Team
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InterAction Best Practices

July 2017
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Overview

As your organization finalizes your InterAction rollout, ensuring that the right resources are available to maintain the system on an ongoing basis is critical. To accomplish this, LexisNexis InterAction recommends creating an Ongoing Maintenance Team.

This team should include individuals with technical, functional, and end-user training/education expertise. The Ongoing Maintenance Team frequently includes key individuals from the implementation project. At times, you may want to involve resources with software development skills for special projects, such as additional custom integration.

This document focuses on the resources required to maintain the functionality deployed in the initial implementation. Note that an individual may fill more than one role on the team.
## Ongoing Maintenance Team Roles and Responsibilities

This table summarizes ongoing maintenance team, their responsibilities, and required skills. It also lists the related documentation and software they will need to accomplish their tasks. Distribute these materials as outlined in this table. For more details about these resources, see “Available Resources” on page 6.

<table>
<thead>
<tr>
<th>Role</th>
<th>Typical Titles</th>
<th>Responsibilities</th>
<th>Skills and Knowledge</th>
<th>Materials Needed</th>
</tr>
</thead>
</table>
| Project Sponsor(s)          | Managing Partner                                    | Monitor progress toward business objectives and adjust organizational factors as needed to encourage adoption:  
  - Education  
  - Incentives  
  - Processes  
  - Continue to sponsor the vision for CRM at the organization  
  - Drive critical organizational policy decisions  
  - Help identify opportunities for ROI Lead acceptance of the CRM solution                                                                 |  
  - Leadership  
  - Business vision  
  - Credibility with the professionals in the organization                                                                                 |  
  - InterAction Fundamental Concepts  
  - Internal Marketing Rollout Kit                                                                                                           |
| CRM Leader/Owner            | Marketing Director  
  Director of Business Development  
  CRM Manager  
  Knowledge Management Manager | Manage and coordinate the ongoing CRM processes  
  Monitor progress and issues and report to Senior/Executive Management and Project Sponsor                                                                 |  
  - Process management skills  
  - Understanding of the big picture objectives and performance measures  
  - Authority to define processes for the organization or the support of someone with that authority                                                                 |  
  - InterAction Fundamental Concepts  
  - Project documentation                                                                                                                    |
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</tr>
</thead>
<tbody>
<tr>
<td>Marketing User(s)</td>
<td>Marketing Manager</td>
<td>- Develop mailing lists</td>
<td>- Strong InterAction Windows Client skills</td>
<td>- InterAction Fundamental Concepts</td>
</tr>
<tr>
<td></td>
<td>Marketing Assistant</td>
<td>- Profile contacts with detailed information and appropriate contact types</td>
<td>- Clear understanding of the organization’s CRM policies and procedures</td>
<td>- InterAction for Data Stewards and Marketing Users guide</td>
</tr>
<tr>
<td></td>
<td>Marketing Coordinator</td>
<td>- Export data as needed for use in other applications</td>
<td></td>
<td>- Project documentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Execute mailings/events</td>
<td></td>
<td>- Training courses targeted for Marketing users</td>
</tr>
<tr>
<td>Business Development (BD)</td>
<td>BD Manager</td>
<td>- Record activities for marketing or BD-related actions</td>
<td>- Strong InterAction Windows Client skills</td>
<td></td>
</tr>
<tr>
<td></td>
<td>BD Liaison</td>
<td>- Maintain InterAction folders and archive unneeded folders</td>
<td>- Clear understanding of the organization’s CRM policies and procedures</td>
<td></td>
</tr>
<tr>
<td></td>
<td>BD Coordinator</td>
<td>- Support professionals in complex activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Determine appropriate data change management levels</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>- Determine data clean up and maintenance plan</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>- Create reports to support these activities; these are usually only available to the individual user unless the individual also has the Report Manager role</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document BD plans</td>
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<td></td>
</tr>
</tbody>
</table>
## LexisNexis® InterAction Implementation Roles—Ongoing Maintenance Team

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<tr>
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</thead>
</table>
| **Data Steward(s)**   | Marketing Assistant                                | - Evaluate and maintain data quality  
- Process Data Change Management tickets  
- Assign appropriate contact types to contacts  
- Execute data clean up and maintenance plan:  
  - Identify and merge duplicate contacts  
  - Identify and correct incomplete and suspect data  
  - Run Association Cleanup  
  - Identify and archive obsolete contacts  
- Maintain InterAction folders and archive unneeded folders | - Knowledge of InterAction Windows Client and Data Change Management tools  
- Knowledge of the organization's market clients and prospects  
- Detail oriented | - InterAction Fundamental Concepts  
- InterAction for Data Stewards and Marketing Users guide  
- Project documentation  
- Training courses targeted for Data Steward and Marketing users |
| **Report Manager(s)** | - Often either in marketing or a system administrator | - Edit InterAction's out-of-the-box reports so they match your organization's InterAction configuration  
- Create new reports or remove reports based on the needs of your organization  
- Customize the viewing rights for specific reports | - Strong InterAction Windows Client skills  
- Knowledge of InterAction's reporting tools  
- General understanding of report writers | - InterAction for Data Stewards and Marketing Users guide  
- Training courses targeted for Reporting users |
| **End-users Education/End-user Support** | - Help Desk Supervisor  
- Training Coordinator  
- Support Center Coordinator | - Maintain end-user training materials  
- Lead end-user education classes  
- Create customized end-user documentation such as getting started guides, class handouts, and quick reference sheets  
- Provide phone and floor support to end users  
- Provide refresher or advanced training as needed | - Training development and delivery  
- End-user documentation skills  
- Word processing skills (for customizing the Education Toolkit) | - InterAction Fundamental Concepts  
- Training courses targeted for Trainers  
- Education Toolkit files  
- InterAction DVD download for the software |
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Application Manager/</td>
<td>Application Manager</td>
<td>• Configure the Application Server</td>
<td>• Familiarity with the Windows Client</td>
<td>• Project documentation</td>
</tr>
<tr>
<td>Administrator</td>
<td>Application Administrator</td>
<td>• Monitor log files for Application Server and data quality tools</td>
<td>• Knowledge of InterAction Administrator</td>
<td>• Administering InterAction guide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Configure and monitor scheduled processes:</td>
<td></td>
<td>• Configuring InterAction guide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ PIM Synchronization (Microsoft® Outlook or Lotus Notes)</td>
<td></td>
<td>• Loading Data into InterAction guide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ User to Firm Contact Sync</td>
<td></td>
<td>• Training courses targeted for Application Administrators</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Folder dependency Analyzer</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>◦ Database Maintenance Script</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Configure, schedule, and monitor Application Collaboration as needed</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Administer users, groups, and security</td>
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<tr>
<td></td>
<td></td>
<td>• Update InterAction to meet new business requirements</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Configure reports as needed to support the organization’s use of InterAction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Database Administrator</td>
<td>Database Administrator</td>
<td>• Perform database maintenance</td>
<td>• Database management skills</td>
<td>• Project documentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage database and log processes and ensure compliance with disaster recovery</td>
<td></td>
<td>• Administering InterAction guide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>procedures</td>
<td></td>
<td>• Training courses targeted for Application Administrators</td>
</tr>
<tr>
<td>Network Administrator</td>
<td>Network Administrator</td>
<td>• Manage firewall settings</td>
<td>• Network administration skills</td>
<td>• Project documentation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Analyze system performance and optimize the network as needed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Typical Titles</td>
<td>Responsibilities</td>
<td>Skills and Knowledge</td>
<td>Materials Needed</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Software Deployment Manager</td>
<td>Software Deployment Manager</td>
<td>Build and test packages to deploy new releases and patches</td>
<td>Knowledge of deployment software and patches as they are released. See &quot;InterAction Software Patches and New Releases&quot; on page 13</td>
<td>New InterAction releases and patches as they are released. See &quot;InterAction Software Patches and New Releases&quot; on page 13</td>
</tr>
</tbody>
</table>

*LexisNexis® InterAction Implementation Roles–Ongoing Maintenance Team*

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More About the CRM Manager

A document describing the CRM Manager role in more detail, *CRM Project Manager - Job Responsibilities and Skill Set* is available on the [Implementation Tools](#) page.

You can use this document to fully understand the recommended responsibilities of the individual serving in this role and the skills required. You can also use the information when creating a job description for hiring an individual to work in this role.

More About Data Stewards

A document describing the data steward role in more detail, *InterAction Data Steward Role - Job Responsibilities and Skill Set*, is available on the [Implementation Tools](#) page.

You can use this document to fully understand the recommended responsibilities of the individuals serving in this role and the skills required. You can also use the information when creating a job description for hiring an individual to work in this role.

How Many Data Stewards Should Your Organization Have?

The number of data stewards needed varies depending on several factors:

- How your organization's Data Change Management rules are configured. You need more data stewards if changes are required to be submitted for approval through Data Change Management.
- How many contacts will be closely monitored? The more contacts your organization wants to monitor, the more data stewards you will need.
- The quality of your data. When you are first implementing InterAction, more time is spent cleaning contact data, profiling contacts, and working to improve the quality of the data than what is typically necessary on an ongoing basis.
- The number of contacts in InterAction. For example, a database containing 200,000 contacts has more data quality issues to maintain than a database with only 20,000 contacts.
- The number of users managing contact information through the Web Client or their PIMs. For example, 500 users actively managing contacts will produce more Data Change Management tickets than just 50 users.

In a typical environment, the following can be expected:

- Per 100 users, approximately five hours a week are spent resolving Data Change Management tickets
- For databases containing 50-70,000 contacts, approximately 25-30 hours are spent per week fulfilling the data steward role. For databases with 100,000 or more contacts, this number approaches 40 hours per week.

For more about the data steward role, see the following:

- [Loading Data into InterAction Guide](#)
- [InterAction for Data Stewards and Marketing Users Guide](#)
Additional Resources

Members of the Ongoing Maintenance Team will need access to several InterAction resources, such as documentation, patches, and Education Toolkit components. Most of these resources are available on the Support Center Web site: https://lexisnexis.custhelp.com/app/interaction

Customers current on maintenance can call Technical Support or send an email message to the Technical Support staff to obtain their User ID and Password to log on to the Support Center.

To contact Technical Support:
- US Support Only: +1.888.575.9830 (Toll Free)
- International Support: +1.630.572.9830
- InterAction onDemand: +1.888.456.5391
- Email: support@interaction.com

For an overview of the materials frequently used by the Ongoing Maintenance Team, see the following sections:
- "InterAction Documentation" below
- "Education Toolkit" on the next page
- "InterAction Software Patches and New Releases" on page 13
- "InterAction Best Practices" on page 13

InterAction Documentation

The following table summarizes the documentation provided with InterAction. All documentation is also available on the Support Center Web site: https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1091325

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>InterAction Fundamental Concepts</td>
<td><strong>Read this guide first.</strong> It walks you through all the fundamental concepts of InterAction that you should understand before installing, configuring, or using the software.</td>
</tr>
<tr>
<td>Loading Data Into InterAction</td>
<td>This guide is a complete reference to the processes and tools used to bring clean data into InterAction.</td>
</tr>
<tr>
<td>Configuring InterAction</td>
<td>This guide provides detailed instructions about how you can configure the many components of InterAction to meet the needs of your organization.</td>
</tr>
<tr>
<td>Administering InterAction</td>
<td>This guide describes all system administration concepts and tasks, including troubleshooting and reference information.</td>
</tr>
<tr>
<td>Title</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>InterAction for Data Stewards and Marketing Users</td>
<td>This guide is a complete reference for maintaining data quality and performing marketing automation using InterAction. It includes information about the InterAction Windows Client, Data Change Management, and data quality tools.</td>
</tr>
<tr>
<td>InterAction for Personal Information Managers (PIMs)</td>
<td>This guide provides detailed information about configuring, administering, and using InterAction for Lotus Notes and InterAction for Microsoft Outlook (Legacy Outlook Add-in).</td>
</tr>
<tr>
<td>InterAction for Microsoft Outlook</td>
<td>This guide describes how to use InterAction for Microsoft Outlook.</td>
</tr>
<tr>
<td>Using the InterAction Web Client and Desktop Integration</td>
<td>This guide provides instructions for performing common Web Client tasks. It also provides how-to information for using the Desktop Integration components such as word processor and PIM integration.</td>
</tr>
<tr>
<td>InterAction Installation Reference</td>
<td>This electronic reference provides instructions for installing all InterAction components in the correct locations. An installation quick reference card is included with the printed documentation set.</td>
</tr>
<tr>
<td>InterAction Strategic Account Management (for InterAction Strategic Account Management customers only)</td>
<td>This guide describes how to configure and use InterAction Strategic Account Management.</td>
</tr>
<tr>
<td>InterAction IQ (for InterAction IQ customers only)</td>
<td>This guide describes how configure and use InterAction IQ.</td>
</tr>
<tr>
<td>InterAction Contact Verifier (for InterAction Contact Verifier customers only)</td>
<td>This guide describes how to install, administer, and use InterAction Contact Verifier.</td>
</tr>
<tr>
<td>InterAction Matters (for InterAction Matters customers only)</td>
<td>This guide describes how to configure the InterAction Matters module.</td>
</tr>
</tbody>
</table>

**Education Toolkit**

The Education Toolkit includes procedures, sample quick reference guides, and other documents that can be useful when developing the end user education program.

Education tools are available at the following location: [https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1081599](https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1081599)

**Internal Marketing Rollout Kit**

The InterAction Internal Marketing Rollout Kit is designed to help your organization internally market InterAction to all users and gain their enthusiasm and support for the implementation.
The Ongoing Maintenance Team members with the end-user education, end-user support, and CRM manager roles should check for updated versions of these documents on a regular basis.

**InterAction Software Patches and New Releases**

LexisNexis InterAction releases product updates and patches when necessary to correct issues. These patches can be downloaded from the following location: [https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1098386](https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1098386)

The Ongoing Maintenance Team members with the technical specialist role should periodically check for new patches and update the environment accordingly.

LexisNexis InterAction sends proactive notification of technical updates and patch fixes. To be added to the email distribution list, send an email message to patchnotify@interaction.com.

**New InterAction Releases**

LexisNexis InterAction notifies all customers when a new version of InterAction is released. Electronic documentation and Education Toolkit documents are also updated for the release.

**InterAction Best Practices**

LexisNexis InterAction Best Practice documents are recommended solutions for incorporating your various business processes into InterAction. These documents frequently link out to the InterAction documentation for more information.

The Best Practice documents are available at the following location: [http://help-blss.lexisnexis.com/Content/Topics/interaction-product-page.htm](http://help-blss.lexisnexis.com/Content/Topics/interaction-product-page.htm)