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-David Cass, President and CEO of Cass, Inc.

## Data Processing Service Discovers ‘Match’ to Help Clients

### Company

Cass, Inc.

### Industry

Data Processing Services

Based out of Acton, MA, Cass, Inc. has been providing complete data services for data mining and direct mail clients since 1986. Their services incorporate all aspects of the data preparation process required for direct mail, fundraising, and CRM initiatives. Past projects have included work for the University of Michigan, Compaq Corporation, General Motors, Fidelity, and a host of other clients.

### Challenge

By 1991, Cass, Inc. had a reputation with industry insiders as a company capable of handling complex business challenges. One such challenge facing their customers involved identifying and removing duplicate records. The company wanted to find a solution to take care of the problem, while at the same time, be able to customize how to merge and purge their customers’ data.

In December of 1991, Cass, Inc. implemented Melissa Data’s MatchUp, formerly known as DoubleTake. MatchUp is an extremely fast and powerful programmer’s tool that can be integrated into custom applications to eliminate duplicate records

### Solution

MatchUp

### Benefits

- » Reduce costs associated with duplicate records
- » Increase response rates
- » Maintain a productive, efficient database
- » Reduce errors and save time with merge/purge

### About CASS

Cass, Inc has been “Making Data Work” since 1986 by providing services to consulting firms, advertising agencies, project managers, and service brokers for data management projects. By utilizing custom data management software—as well as off-the-shelf solutions—they deliver the best resolutions to complex data.

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## Results

The company soon found that the tool was a multi-tasker. In addition to maintaining an efficient database, it also reduced printing costs and increased response rates.

“MatchUp is one of the essential tools that allows us to provide quality results for our clients,” says David Cass, President and CEO of Cass, Inc.

Cass says that a typical project requires a final mail file of five million names.

MatchUp is first used to import and merge their clients’ lists. They use the merge feature to import and merge 30 to 50 large input lists containing different formats and different field layouts. During the merge process, names can be combined or split by changing Prefix/First/Middle/Last/Suffix to or from a single full name field. The process can also combine or split City/State/ZIP components as well as other fields of data.

Cass says that without the merge feature of MatchUp, it would take much longer to combine all of the lists in a project.

At this point, duplicates within and between the source lists are removed, based on fully customized criteria to meet business requirements. Multiple criteria can be used within a single merge/purge operation, with names being removed if they match any one of the separate criteria. At the same time, the system selects which record to output based on programmable criteria that can prefer one source code over another.

“The customizable merge/purge criteria allow us to fine tune duplicate identification that matches the business objectives,” Cass states.

Next, the client’s current customer file is used as a suppression file against the data. Depending on the requirement, Cass says this process can be done at the same time as the de-duplication process, or as a separate process.

After the records have been reduced to a candidate mail file, records can be selected at random, based on codes, and/or geography, to create test cells allowing the client to test different creative packages.

The records in the file are coded with unique ID numbers and source file indicators to allow response tracking.

Data is then exported to the file format and field layout required for the mailing process.

MatchUp provides a comprehensive set of reports showing multi-buyer and list overlaps, to allow future list purchase analysis.

“The reports have allowed us to identify list overlaps so that less expensive lists with the same characteristics can be used,” Cass reveals.

When asked what MatchUp feature Cass finds most valuable he divulges, “Without the merge feature, it would take much longer to combine all of the lists in a project. Also, the targeted duplicate removals allow a significant amount of postage and printing cost savings.”

## About Melissa Data

Melissa Data is a leading provider of data quality and mailing solutions. Melissa Data helps companies acquire and retain customers, validate and enhance data, improve marketing ROI and save money on postage and mail processing. Since 1985, Melissa Data has helped companies like Mercury Insurance, Xerox, Disney, AAA, and Nestle improve customer communications.

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