



Catchlight Profile & Enrichment FAQs

What counts as an enrichment?

When a contact is entered into Catchlight (whether through the UI, API, or Salesforce, or other method), if the information provided (First Name, Last Name, Phone Number, and/or Email Address, or Home Address) allows us to successfully identify the individual with a greater than fair match confidence* and we then create a Catchlight Profile, that counts as an enrichment.

If Catchlight is unable to identify the individual, whether it be because there is a misspelling, incorrect information, unavailability of data, or low match confidence, that would not count as an enrichment and will therefore have an Enrichment Status of "failed". Other possible Enrichment Status' could be:

- Insufficient Data – the contact was submitted without sufficient data for enrichment (first and last name and one of email, phone, or street address)
- Prohibited – the enrichment process is prohibited due to legislation or local regulations

Once a contact is successfully enriched, it will count toward your annual profile limit. Deleting a contact does not return the credit to your balance, so swapping a name for a name would still count as two enrichments.

*Match Confidence= how confident the Catchlight algorithm is that we've found a strong match.
Possible values: Excellent, Good, or Fair

Does the Catchlight profile get refreshed periodically?

Yes, 4x/year Catchlight will refresh the data at no additional cost. This is helpful because Catchlight scores are subject to change over time as people reach new financial milestones. A highlight of Catchlight is the visibility into Life Events and Milestones, such as being Eligible for Medicare, Eligible for Retirement, Eligible for Early Retirement, and many more ways to segment leads by relevancy. Since these datapoints are connected to age, by refreshing the data we can move people through these events, both when they qualify and no longer qualify.

What if I update or change the information for a contact I have already added to Catchlight?

If you update any of the core data points (First Name, Last Name, Phone Number, Email Address, Address) it may trigger a re-enrichment. Any additional or updated information about a contact could uncover new Catchlight data and contribute to their Catchlight score. This re-enrichment counts toward your annual profile limit.



Note for Salesforce Users: If you have a “chatty” Salesforce environment with frequent, automatic data cleaning or formatting of “core” data (First Name, Last Name, etc.), that is something to take into consideration when setting up and customizing the app. The Catchlight team can help guide you through preventing unwanted re-enrichments. The chart below outlines what types of changes to the core data will trigger an enrichment:

Type of Record Change in Salesforce	Triggers a Catchlight Profile Update?
A user changes the “Lead Source” Field on a Lead	✗ No Catchlight profile update triggered
A user adds an email address to a Contact	✓ Catchlight profile update triggered
A user fixes a typo on the email address for a Lead	✓ Catchlight profile update triggered
A system process formats an address from “St.” to “Street”	✓ Catchlight profile update triggered
A system process formats a phone number from “123.456.7890” to “+1 (123) 456-7890”	✓ Catchlight profile update triggered

What to expect around renewal with existing enrichments

When it comes time to renew your partnership with Catchlight, you may choose to leave existing contacts synced to Catchlight to continue getting those 4x/year updates, or you may elect to delete them. To keep the contacts active will incur the cost of 1 enrichment, as it did the year prior. This is due to the ongoing work and cost of fetching and updating data points throughout the new contract year.

You can choose to keep some contacts and delete others—the choice is yours. A few considerations when thinking about which contacts to keep active:

- They aren’t a fit at this time, but life changes may increase their Catchlight score between now and then
- You want to create a segmented drip marketing campaign for those who have the potential to benefit from your services in the future, with the topics determined by Financial Interests or Milestones.

What happens when unsyncing or deleting contacts from Catchlight

- **Salesforce app:** If you do unsync with Catchlight from the Salesforce app, the existing Catchlight data will not be removed from your Salesforce instance but will no longer be updated 4x/year.
- **Web app:** If you delete contacts from the web app, the contacts and all of their data will be removed. You may want to first export data before deleting
- **API:** Whether you delete contacts via API calls, or in concert with your Catchlight Customer Success contact, the contacts and all of their data will be removed from the Catchlight database. You may want to first export data before deleting



Can I get help in deleting some contacts but keeping others?

Yes, the Catchlight Customer Success team can help you with the process, reach out to your Customer Success Manager or support@catchlight.ai for help!

What to expect around renewal for future enrichments

Once you've determined how many leads/clients in your database you want to keep Synced with Catchlight, that number should be added to your anticipated lead count for the next contract year.

For example: You are planning to keep 5,000/15,000 existing contacts because you believe that subset has the potential to become a good fit in the foreseeable future. Your marketing plans have you anticipating that you'll need another 15,000 leads in addition to the existing. It would be advised to pre-purchase 20,000 leads for the new contract period.