Data Quality Super Powers

And Why Salesforce Admins Need Them

Summary

Like everything else in the universe, Salesforce systems have a tendency to become more disorderly as time goes on, making data quality a routine part of an administrator's job.

When Salesforce systems grow in size to contain many thousands of records and fields, and expand to serve many users, admins can easily become overwhelmed trying to maintain data quality using only native functionality. To keep up with rapidly evolving databases, admins need super powerful data-cleansing tools that can only be found in select third-party apps.

CRMfusion Inc. | 14 Wolford Court Keswick ON L4P 0B1 Canada

Introduction

Data quality is an ongoing concern for Salesforce administrators. If they don't maintain a data-cleansing regime, the quality of the data in their CRM systems will gradually erode, worn away by users' errors and omissions. Admittedly, some organizations are less sensitive than others to bad data. At these organizations, data quality may decline for years on end without being recognized as a problem in need of a solution.

However, when a sales team aspires to a certain level of development—in terms of size, efficiency, performance, and other metrics—they often reach a tipping point with respect to data quality somewhere along their journey. At this critical point, the team is forced to acknowledge that bad Salesforce data is exerting a *significant and pervasive drag on their operations*, keeping them from achieving their goals.

Poor data quality *works against* a sales team in two fundamental ways:

1. **It Promotes a Lack of Trust**
   Sales reps can't afford to waste time, effort, and money. If their ability to do their job is in any way compromised by inaccurate or incomplete Salesforce data, they quickly lose trust in the system. Instead of working within Salesforce, they work around it. When trust erodes, Salesforce adoption rates plummet.

2. **It Imposes a Low Ceiling on Productivity**
   When Salesforce data quality is poor, sales teams have much more overhead in the selling cycle. For example:

   - Reps have a high initial level of suspicion when approaching prospects because they've been burned too many times by bad information (e.g., a promising prospect turns out to be another rep's customer).

   - Reps have to do more work up front, such as maintain individual sales spreadsheets, conduct hours of additional research to vet prospects, and ask extra qualifying questions before pitching to prospects.

   - Reps experience more conflicts with their colleagues because it is easier for them to simultaneously pursue the same prospect or customer without realizing it.

   - Managers spend more time addressing complaints and settling conflicts.

Salesforce administrators who want to improve data quality are often frustrated by a lack of adequate tools for policing their ever-changing databases. Still, they doggedly spend hours every week on data cleansing, time that could be better spent on other important responsibilities. They toil away at these tedious tasks knowing—or at least suspecting—that the results will be far from ideal. Administrators do what they can with the tools they have (even though it takes a long time) because it's part of their job and doing nothing would be even worse.

But do Salesforce administrators really have to spend so much time struggling with data quality? Isn't there a better way to handle this challenge?

This white paper examines the limitations of using native Salesforce functionality to manage data quality and then explains how Salesforce administrators can significantly improve data quality with applications such as DemandTools, PeopleImport, and DupeBlocker by CRMfusion.

Managing data quality without super powers

Every company is different, so every Salesforce administrator faces a unique combination of data quality challenges. Size of database, number of users, rate of change of data, type of data, data standards, acceptable quality level, and other such factors set the agenda.

Since Salesforce is intended as a CRM *platform* that companies can build on and adapt to their unique circumstances, it comes with only a basic set of out-of-the-box tools for managing data quality. While these tools may be adequate for administering newer and smaller Salesforce systems, it's a different story when databases grow in size to contain many thousands of records and fields.

Administrators who rely solely on native Salesforce tools to manage data quality often find they are fighting a losing battle:

- **There are not enough hours in the day.** Native tools include little in the way of automation, ergo administrators must perform data quality tasks manually, which can be very time consuming. Salesforce instances with many users are apt to change so fast that administrators just can't keep up, no matter how many hours they dedicate each week to data cleansing.

- **The tools produce marginal results.** Native tools lack the features needed to properly cleanse large Salesforce databases and maintain a high level of data quality.

- **A lot is left undone.** Administrators simply do not attempt some data cleansing activities because they are not practical to undertake with the tools available; either the required effort exceeds the value of the expected benefit or the task simply cannot be completed in a useful timeframe.

To put these difficulties in a proper context, administrators must review how they currently use native Salesforce tools to address their own data quality challenges.

Challenge #1: Duplicate records

In native Salesforce, administrators rely on the *Merge* feature to find existing duplicate records and combine them, up to three at a time. (Note: Only Leads, Contacts and Accounts can be merged.)

A different set of search parameters apply to each record type:

- **Accounts**
  Search by Name only. Example: A search for **ABC** turns up "ABC Inc." and "The ABC Company".

- **Contacts**
  Browse Contacts listed under an Account. Example: Contacts "Bob Smith" and "B Smith" listed under the "ABC Inc." account can be merged.

- **Leads**
  Search by Name or Company. Example: A search for *John Smith* and *XYZ Inc.* turns up four Leads named "John Smith"—who may be associated with any company—and all Leads with "XYZ Inc." as the company.

The *Merge* feature has limited usefulness as a de-duplication tool because most duplicate records are not exact matches. Because of variations in punctuation and spelling (typos are common) many duplicates are easy to miss with basic name searches.

For example, ABC Corp could appear in Salesforce as:

- ABC Inc.
- A B C Inc.
- A.B.C. Corporation.
- A-B-C Ltd.
- ZBC Inc.
- The ABV Group

Also, companies that have changed their names (i.e., due to rebranding, merger, takeover) could be listed multiple times in a Salesforce database and never turn up as duplicates in a basic name search.

To find all existing duplicates, administrators need to compare various fields and combinations of fields, such as street address, city, state, and phone number. Doing this manually is very time consuming and open ended; it's not a feasible option for most administrators.

Challenge #2: Mass record imports

When importing data such as lead lists or legacy records from other systems, administrators no doubt do their best to ensure that it's clean because they know that every inaccurate, incomplete, or duplicate record introduced into Salesforce compromises data quality. For example, missing contact information could delay invoicing or product delivery; or duplicate records could cause sales reps to pursue other reps' customers as if they were new prospects.

Still, vetting new data requires significant effort. Administrators who want to determine if records already exist in Salesforce (prior to importing them) must manually search for each Contact, Account, etc. This is very time-intensive work. Plus, administrators can only expect to find exact matches unless they spend *even more time* fishing for less obvious duplicates with various fuzzy and wildcard searches.

So is it reasonable to expect busy Salesforce administrators to manually comb through every record in a list of hundreds or thousands? Probably not, especially if they import lists on a weekly or monthly basis.

Administrators who rely solely on native tools simply have no choice but to accept that a certain amount of bad data will enter Salesforce—and there's little they can do about it, either before or after the import.

Challenge #3: Mass record updates

Updates to existing Salesforce records may include adding new information, correcting wrong or outdated information, applying new data standards, or reassigning records (by sales rep, territory, or products/services).

In native Salesforce, administrators must follow a manual, multistep process to perform mass record updates:

1. Export Salesforce data to a CSV file.
2. Back up the CSV file to preserve the original data.
   (Salesforce does <u>not</u> automatically generate restore files.)
3. Make changes to the data with a CSV editor such as Excel.

4. Map fields in the CSV file to Salesforce fields.
5. Import the changed data.
6. Check the results in Salesforce. If necessary, undo changes by importing the backup copy of the exported CSV file.

When administrators need to process a complex set of changes involving numerous Salesforce fields, they often find it prudent to do so in stages (i.e., by going through the update process several times, focusing on different fields in each pass). This approach, while sensible, also takes significantly longer because the export/re-import steps have be repeated again and again.

Powering up for data quality

To achieve and maintain a consistently high level of Salesforce data quality, administrators need to move beyond their standard tool set and adopt advanced third-party applications with features that are so effective they seem like super powers, by comparison.

DemandTools, PeopleImport, and DupeBlocker are three such applications. For years, they have helped Salesforce administrators achieve radical *time savings* and *productivity gains,* both for themselves and the sales teams they serve. Administrators literally save hours every week and achieve much higher data quality than would otherwise be possible.

Here are some examples of the **data quality super powers** that have had a transformative impact on these Salesforce administrators and their sales teams:

- **Automated de-duplication**
  Automatically find and merge duplicates across ALL objects: Contacts, Accounts, Opportunities, Leads, and custom objects. Conduct rules-based de-duping with complex algorithms. Schedule regular, automatic checks.
- **Real-time duplicate prevention**
  Block duplicates completely or simply warn users of potential duplicates by showing them a list of similar records.
- **Record updates**
  Revise complete records—without the time-consuming, manual export/re-import procedure. Get full visibility on pre- and post-change data, with fine control over what gets updated. Change multiple fields at the same time.
- **Mass record assignments**
  Easily assign/reassign records to different team members without a record limit.

- **Record ID matches**
  Use sophisticated search algorithms to match external list items with Salesforce records. For example, from a list provided by accounting software, match on internal Customer Number to find Accounts in Salesforce.

- **Easy lead list imports**
  Allow marketers to import trade show lists, purchased lists, etc. on their own. (One less task for a busy administrator.) Automatically merge imported records with existing duplicate records. Compare against Leads, Contacts, and Accounts during import.

- **Multi-table join exports**
  Access child and parent data. For example, export Contacts and get Account and Parent Account data at the same time. Also, save each export scenario for quick, repeatable exports.

What's Super About Our Apps?

CRMfusion apps are super powerful because they provide:

- ***Automation***
  Quickly and easily implement large, complex scenarios.
- ***Better Tools***
  Simplify work, increase precision, and do more.
- ***The Ability to Delegate***
  Let other departments take on traditional administrative tasks.

Results are what matter:

Salesforce admins achieve radical time savings and productivity gains using CRMfusion apps.

Conclusion

There's only so much a Salesforce administrator can do to improve data quality without the aid of third-party applications. In Salesforce systems with thousands of records, and a multitude of users making constant changes, the scale of the challenge is simply too large for manual data-cleansing methods to be effective. No matter how much time administrators spend on manual approaches, they will never achieve the desired result.

To compound the problem, every hour spent on data quality is an hour that Salesforce administrators cannot spend on other important (and less tedious) activities such as system improvements, training, and documentation.

Looking on the bright side, when Salesforce administrators reach a certain threshold of time spent on data quality, it's much easier for them to build a sound business case for purchasing a productivity-enhancing app that will lighten the load.

Salesforce administrators who want to stop struggling with data quality and start using their time more productively need the super powers that DemandTools, PeopleImport, and DupeBlocker can provide.

With a *data quality super hero* on duty, sales teams can develop greater trust in their Salesforce system and use it to boost productivity to all-time highs.

How to get data quality super powers

You don't have to jump into a vat of toxic waste to become a data quality super hero. All you have to do is visit us on the **Salesforce AppExchange**. And while you're there, be sure to check out the stellar product reviews written by our super customers.

Acknowledgments

We would like to extend a warm thank-you to these Salesforce administrators and their organizations for sharing their wealth of experience with us:

- **Leyna Hoffer**
  Sales Systems Manager, Edmentum Inc.
- **Brian Makas**
  Director of Marketing Technology & BI, ThomasNet
- **Dorrie Spahr**
  Senior Salesforce Administrator, Edmentum Inc.

Any errors or omissions in this paper are those of CRMfusion alone.

Data quality solutions for Salesforce admins

CRMfusion’s industry-leading solutions help Salesforce administrators achieve and maintain the highest levels of data quality.

Regularly monitor and cleanse a Salesforce database with…

DemandTools

The industry’s leading Salesforce data quality toolset, DemandTools has 11 modules for controlling, standardizing, verifying, de-duplicating, importing, and generally manipulating data. These powerful tools are a huge time-saver for Salesforce administrators, giving them the ability to cleanse thousands of records in mere minutes. DemandTools was first launched in 2004 and today is installed at 5000+ Salesforce.com customer locations in 21 countries.

> *“DemandTools is…the single-most valuable app I've downloaded from the AppExchange. DemandTools has saved me immeasurable amounts of time and has helped to insure greater data integrity—huge issues for any Salesforce.com Administrator…We recently combined two separate instances of Salesforce.com and I shudder to think of the data nightmare that I would have had on my hands, if I didn't have my handy DemandTools to assist me…This is definitely a ‘must have’ application and well worth the investment! I truly could not do my job without it.”*

> *“CRMfusion's DemandTools is my ‘go-to’ resource for many tasks, since it makes mass updates, imports, dupe checking, and discovery extremely easy. It has proven invaluable in our migration to Salesforce from another CRM system. Contacts that had been incorrectly aligned with accounts when our data was migrated were quickly updated to correct the problem.”*

Prevent dupes during mass imports with…

The ultimate tool for importing Accounts, Leads, and Contacts into Salesforce, PeopleImport makes it easy for a sales team to integrate new lists or trade-show data into the database without creating duplicates or losing any valuable information. During import, team members can perform additional marketing functions such as campaign and task assignment.

> *"We have been using PeopleImport for several years and I am thrilled with the results. We manage about fifteen events/seminars per year and constantly have to import new records and update existing leads and contacts. This application allows us to do that quickly and easily without having to worry about creating duplicate records. Most importantly, when needed, technical support is tremendous."*

Prevent dupes during individual transactions with…

The only enterprise-capable, real-time duplicate solution on the market, DupeBlocker stops users from creating duplicates in real time—even in the world's largest Salesforce databases. DupeBlocker also prevents dupes from being created by Web-to-Lead forms and integrated software systems. DupeBlocker was designed to complement DemandTools and PeopleImport.

> *"Visitors to our website need to fill out a form to access some of the collateral, and we use web-to-lead to create a lead in Salesforce. This resulted in new duplicate leads. Prior to DupeBlocker, we would 'de-dupe' on a weekly basis. DupeBlocker flags these as they occur, allowing us to review and merge the duplicates…In addition, DupeBlocker identifies potential lead-to-account and lead-to-contact matches. This is particularly useful when our sales team is already engaged with an account. Finally, DupeBlocker prevents our sales team from creating duplicates when they manually enter/edit leads or contacts in Salesforce."*

PRICING & DOWNLOAD INFORMATION

DemandTools

DemandTools pricing is scalable based upon the size of your Salesforce installation, the base price is $5750/year with significant discounts for salesforce.com customer installations of less than 100 users (for example, a 20 seat Salesforce customer can use DemandTools for only $1150 per year (80% discount).

DupeBlocker

DupeBlocker pricing is scalable based upon the size of your Salesforce installation. Price is calculated as $500 + ($11.50 x total Salesforce users) per year to a maximum $5750 per Salesforce database.

PeopleImport

PeopleImport is sold on a per user per year basis. Each PeopleImport user pays $1150 per year for PeopleImport with the price including upgrades and support.

Free downloads are available for all CRMfusion products at www.crmfusion.com or the AppExchange.

Please contact sales@crmfusion.com for more information or visit www.crmfusion.com.

CRMfusion Inc.
14 Wolford Court
Keswick ON L4P 0B1
Canada

Sales and Support Hotline
800 961-8205

Development/Support and Administration
Phone: 416 628-1486
Fax: 866 289-2934

sales@crmfusion.com
support@crmfusion.com

www.crmfusion.com
Follow @CRMfusionInc