

The Fruits of Data Cleansing

12 proven benefits that can help boost
customer engagement, win more deals,
and nourish your business



Introduction

When things turn sour

You may think data cleansing requires a huge investment in technology and a big chunk of time (and some magic) to turn your Salesforce org into a lean, efficient, lead-nurturing, sales-producing machine.

The truth is, you already have what you need: you have data.

In fact, you probably have data you didn't even know you had. Data that holds valuable information like which marketing campaigns bring the highest quality leads or which customers are prime candidates for upsell opportunities. Your data could even help identify internal processes that could be made more efficient.

If you find yourself second-guessing Salesforce reports, sifting through duplicate records, or struggling to make business decisions based on data that is spread out across many systems, there's likely an underlying issue.

The quality of your data is the likely culprit. It's preventing your data from bringing value or providing key insights. You're stuck trying to make sense of something that makes little sense.

You need a way to transform dirty data into high quality data. Data that is more useable, trustworthy, and easier to digest.

That's where data cleansing comes in.

What is data cleansing?

Data cleansing isn't a radical idea. Ask any business executive if they want more actionable, reliable data and they'll respond, "Absolutely!"

The way to get there is by doing things like deduplicating, updating, transforming, consolidating, and integrating data. After all of that is accomplished, maintaining high quality data on a consistent basis is equally important.

If you want to accelerate revenue and improve processes, you need to break out of the old mentality that says data cleansing is either for sophisticated IT teams or for companies that have big budgets to invest in highly technical enterprise software. And you can't allow yourself to believe it's not worth the time when you're already busy with so many other operational needs.

Because today, with the right data cleansing tool, it requires neither a dedicated IT team, technical software, nor excessive amounts of time. **Data cleansing doesn't have to be complicated and overwhelming.** Nor does it take that much time and money.

What's the big deal?

Poor data costs businesses \$9.2 million per year according to research by Gartner. But these costs are not just financial. Poor data costs companies a lot in terms of reputation and missed opportunities, and can lead to erroneous and costly decision making.

If data cleansing is inevitable and critical to avoid the negative consequences of poor data quality, why do companies put it off or fail to do it at all? Oftentimes it's because key decision makers, and perhaps even yourself, have trouble seeing the benefits that high quality data can bring. They're not convinced that something like removing duplicate records will have a profound effect on the bottom line, so why dedicate time, money, and resources to the cause?

The truth is that the value derived from data cleansing can feel abstract. It's hard to quantify in terms of actual dollars saved, and it's different for every business.

However, there are several key benefits your company will gain from clean, high quality Salesforce data and that make a huge impact.

The Fruits of Data Cleansing

12 proven benefits that can help boost customer engagement, win more deals, and nourish your business

01 Make smarter, more accurate business decisions

02 Cultivate a more productive and efficient workforce

03 Enhance marketing campaigns and sharpen sales strategies

04 Gain greater visibility and insights into what works (and what doesn't work)

05 Save money and reduce waste

06 Improve customer relationships while making customers happier

07 Protect your brand's credibility and build trust

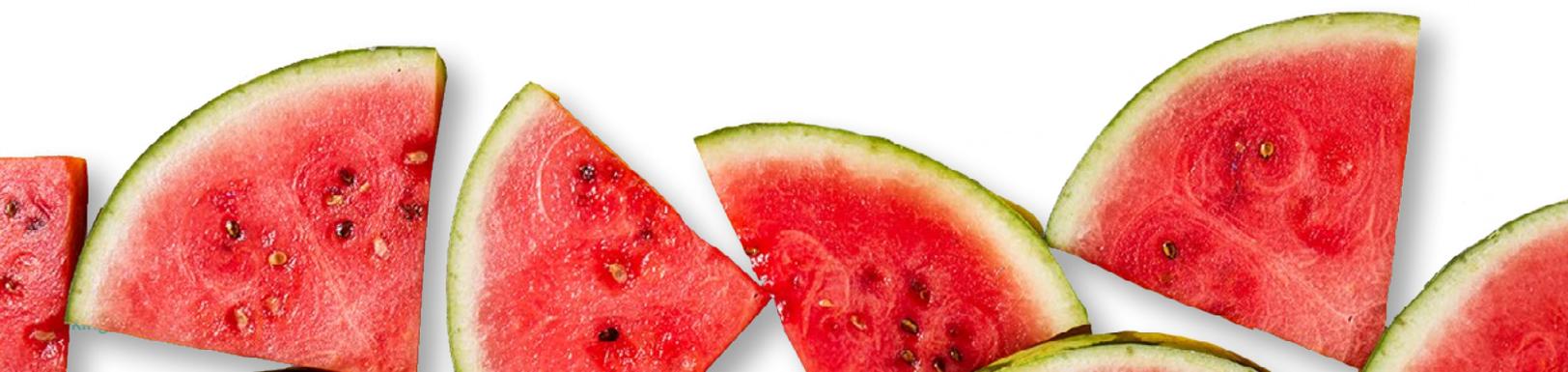
08 Outsmart and outperform the competition

09 Have less fragmentation and more organization

10 Reduce risk while protecting customer privacy

11 Improve CRM user adoption and eliminate workarounds

12 Align teams and advance collaboration with a single source of truth



01 **Make smarter, more accurate business decisions**

Poor quality data quickly skews reports and analytics, causing decision-making to be extremely difficult. Imagine running a forecasting report, only to find the numbers inflated due to duplicated records.

In contrast, clean data fosters an environment where stakeholders have confidence in the data. **They have better insights, accurate metrics, and easier to digest data.**

Business decisions need to be based on facts, not hunches. That's why it's critical to dedicate time and resources to ensure the data you work with is of high quality.

02 **Cultivate a more productive and efficient workforce**

Without the ability to easily identify the right accounts, sales and marketing teams become inefficient. They waste time calling and emailing prospects who may not be the right candidates. Or worse they miss an important opportunity by mistaking prospects for existing customers.

A clean database means less time is spent checking, validating, and digging through duplicate records to find the right information. It can mean no more bad or malformed emails on email campaigns or unvalidated addresses on physical mail campaigns.

Overall, employees don't have to backtrack because of mistakes. Everyone saves time when they don't have to double-check results or fix errors caused by poor data.

03 Enhance marketing campaigns and sharpen sales strategies

Effective marketing and sales campaigns depend on both the quantity and the quality of the data.

Data gives marketing and sales teams the power to understand who their customers are – their needs, wants, expectations, and buying behaviors – all necessary information for successful marketing campaigns and for driving purchases.

Optimizing the quality of marketing and sales data will in turn, optimize the quality of the insights they generate, thus increasing the bottom line.

04 Gain greater visibility and insights into what works (and what doesn't work)

When data is clean you have less dysfunction and greater visibility into your entire organization.

Whether a lack of visibility is caused by a convoluted mess of dirty data, siloed datasets, or both, it can have a profound effect on your ability to spot opportunities for your business. You're likely to run into big stumbling blocks for growth.

An environment with greater data visibility can give your company a lot of insights, both internally and externally. **It can reveal problems with your current workflows, ways to improve upon processes, and areas that can be made more efficient.**

With these insights you can find ways to standardize and streamline processes, potentially saving you a substantial amount of time and money.

success story

Success story Docker, Inc.

Due to a large volume of duplicate records and relevant data points scattered across multiple systems, the sales team at Docker Inc. couldn't rely on the information in Salesforce. Reporting and managing lead queues were impossible.

Problems

- Duplicated data
- Disparate systems
- Misguided lead flow and tracking

Results

- Quality decisions based on quality data
- More productive and efficient workforce
- Greater visibility and insights

They were tracking the same prospects twice because they were both leads and accounts, and they couldn't tell what stage of the sales process prospects were in.

As a result, the sales team migrated away from Salesforce and worked off of spreadsheets, using different methodologies to track their pipeline. Ultimately, Docker was unable to reliably track their business and sales effectiveness.

To solve this problem, Docker used Cloudingo to clean the data which in turn improved the reliability of our data. **Weekly meetings are more productive. Team members are able to make sense of their data. And they're now equipped with much better lead metrics.**

Among the many improvements clean data brought to Docker, one unexpected benefit was a much more precise view of the state of their business. Now they're able to make decisions on consistent, accurate metrics.

“ We knew we'd have better trending info, but we had no idea how off base we were... ”

Melissa Warner, Sales Ops Director



05

Save money and reduce waste

A long-standing theory among data experts is the 1-10-100 rule. The rule states that it costs \$1 per record to prevent poor data quality, \$10 per record to clean and dedupe later, and \$100 per record if no data quality practices are implemented. **In other words, the longer data quality is ignored, the more costly it becomes.**

Part of improving data quality is addressing outdated info. Data decay is unavoidable as people's lives change and companies go out of business or merge.

Deleting or archiving records that have been dormant for a period of time not only contributes to better data quality, but it saves money on CRM and marketing automation subscription fees. Updating and validating mailing addresses could save you money on wasted printing and postage.

Besides monetary costs, there are also opportunity costs associated with poor data quality. Consider the role data plays in marketing campaigns, sales intelligence, forecasting goals, and customer experience metrics. Or how much time is wasted when calls are made to bad phone numbers.

A bounced email or duplicate record here and there may not seem like a big issue, but overtime the ripple effects could significantly cost your business.

06

Improve customer relationships while making customers happier

It's no secret that superior customer service is more important than ever for businesses today. Buyers are more likely to remain loyal to companies based on the experience they receive rather than on price or product.

But in order to succeed at this, you need to understand who your customers are. The only way to do that is by collecting valuable insights and using that data.

This is where data quality becomes important.

When data is clean, you're able to build a detailed customer profile to target the right buyers and track customer habits.

Unique, nonduplicated records mean you can see all touch points from presales, after-purchase follow ups, and customer service communications. Clean data also prevents duplicate touchpoints that can irritate customers.

Tying high quality data with your customer experience will attribute to higher engagement and conversation rates, increased renewal and lower attrition rates, cross-sell and upsell opportunities, a better brand perception, and more loyal customers.

O **Protect your brand's credibility and build trust**

Poor data quality can tarnish your company's brand reputation.

And when your reputation is dented, so too is your brand's credibility.

Even small mistakes like misspelling a customer's name or sending multiple offers to the same recipient can leave a bad taste. Buyers today don't hesitate to vent frustrations with a brand on social media. So, what may seem like a small error within your company can quickly become public.

Worse infractions like data leaks or not following compliance regulations like the CAN-SPAM act or GDPR can be disastrous and PR nightmares. Customers will be quick to distrust you with their information, and trust is harder to rebuild than it is to protect in the first place.

success story

Success story Lucid Design Group

For Lucid Design Group, the damaging effects of dirty data hit the sales department the hardest.

"The sales team was frustrated. They wasted time calling the wrong people - leads who were already customers, ones that were already disqualified, or someone else was already working them," Alexis Grau, CRM Systems Manager, said. "It was a waste of money and time."

Lucid also suffered a lack of visibility into the overall health of their pipeline. "We're a data company, so for us to not have that data is embarrassing," Alexis said. "We really needed to get a handle on that."

Alexis spent hours manually merging and converting duplicated Salesforce records. "It was a lot of work - looking line by line, matching emails," she said.

To speed up the process, Alexis purchased Cloudingo. "When we got Cloudingo I said, 'I can't believe I did anything else before this!'" she said. The ability to easily identify duplicates and automatically merge them saved Alexis hours of work.

Today Lucid's sales team is more productive and they're able to pinpoint and prioritize opportunities.

“ We would need a full-time employee to do what Cloudingo does automatically. ”

Alexis Grau, CRM Systems Manager

lucid

08 Outsmart and outperform the competition

Data that is treated as an asset and managed to ensure it remains of high quality can be a competitive advantage.

For example, poor data puts your company at risk of missing an important opportunity to develop a new product or fulfill a customer ahead of a competitor who is using a more mature and higher quality dataset can capitalize upon.

In other words, optimizing data allows you to discover opportunities and anticipate the needs of the market before your competitors do. It can be a key driver of your ability to respond to market changes and drive growth faster than anyone else.

09 Have less fragmentation and more organization

As businesses grow, so does the amount of data that's collected and kept in Salesforce. Without a solid data management plan in place, your org can quickly become a bloated system filled with inconsistent naming conventions, duplicate records, and so on.

Optimizing Salesforce data ensures everyone is using the same figures and that data is harmonious throughout all different business departments.

Imagine how much time can be saved when interdependent teams all work with the same, unified, and clean set of data. There's no need for any back-and-forth communications that delay workflows ("Is this the right account?").

1 Reduce risk while protecting customer privacy

Risky mistakes and erroneous business decisions are less likely to occur when the information you rely on is of high quality.

Plus, maintaining a clean and organized database is more important than ever with the introduction of widespread data protection legislation.

For example, duplicate records can affect your ability to accurately mark which people have opted in and given consent to your communications. It's likely that discrepancies would occur, putting your company at risk of breaching data regulations like CAN-SPAM and GDPR.

High quality data can mean the difference between being compliant and millions of dollars in fines.

1 Improve CRM user adoption and eliminate workarounds

Poor user adoption is one of the biggest challenges of Salesforce. Without employees consistently and uniformly adding to and utilizing Salesforce, your database is useless.

One of the most common causes of poor user adoption is poor data quality. Users don't trust the data when the data is unreliable.

Employees search for a customer by name but see three other records for the same person. Or they run forecasting reports only to find that the data has been skewed by duplicated Opportunities.

success story

Success story Kindred Healthcare

Through various acquisitions, Kindred Healthcare found themselves with a mix of multiple CRM-like platforms and integrated data systems. Each company division had their own dataset and their own processes, resulting in company-wide data duplication, inaccuracies, and outdated or incomplete information.

Problems

- Siloed data sets
- Poor data quality
- Lack of visibility into pipeline

Results

- Company-wide visibility
- Integrated dataset
- A single source of truth

Kindred needed a way to push disparate data to Salesforce Sales Cloud, making Salesforce the source of record and acting as a master data repository. They also needed to link and update records that were integrated to Salesforce. Most importantly Kindred needed to do all of this without creating new duplicate records and while also eliminating already existing duplicates.

Kindred was able to create a single source of truth using the Cloudingo Web Service API Integration. Cloudingo's API gave Kindred the power to **sync, dedupe, identify master records, and manage data between Salesforce and other on-premise or cloud applications**, like ERPs and accounting and marketing systems.

Each day Kindred performs a process to shuttle and update 700,000 records from outside systems into Salesforce. With Cloudingo, the entire process is fully automated, so they don't have to worry about continual monitoring.

“ Now we're in a position where we've got the data clean, it's staying clean, and it's all tied together. ”

Josh Cates, Senior Programmer and Analyst



If Salesforce data is clean, easy to find, and easy to work with, employees will naturally and comfortably take up Salesforce as an important business tool.

12 **Align teams and advance collaboration with a single source of truth**

In today's data-driven market, a holistic view of your company can give you an advantage over the competition.

Everything from product data, to customer and support data, to marketing and sales conversion rates can inform business decisions. **That's why it's important to create a single source of truth – a place where all points of the customer journey are documented from start to finish.**

Integrating or consolidating all your data into Salesforce, instead of scattering information across multiple sources like a POS system, ecommerce, and an email platform will give you a clear, concise picture of what's going on within your business.

success story

Success story Illinois Institute of Technology

Getting the right message across to the right people was a goal for Margo Schwartz, Salesforce administrator at Illinois Institute of Technology. But due to a Salesforce org filled with duplicate records and stale info, what Margo got instead was silence.

Problems

- Poorly executed import process
- Duplicated data
- Lack of segmentation

Results

- Improved customer relationships
- Smarter, more accurate decisions
- Less fragmentation and more organization

"We weren't getting through to people," she said. "Everyone received everything, rather than really segmenting and targeting people."

The issue stemmed from a poorly executed import process. Records were uploaded to Salesforce without any deduplication check in place. "Lots of the same people attend our events so they were getting imported into Salesforce multiple times," Margo said.

Using Cloudingo, Margo was also able to identify her bad data problems, handle the data clean up, and establish a plan for ongoing maintenance to tame bad data. "Now when I import event attendees and other lists, I use Cloudingo to dedupe those lists."

Today Margo and her team are able to achieve the customer segmentation

they always wanted. "Cleaning our data helped us make better decisions about what to send and to whom," she said.

“ Cleaning our data helped us make better decisions... ”

Margo Schwartz, Salesforce admin



Conclusion

Where do I start?

Addressing data quality issues should not be made an afterthought because poor data quality has a snowball effect. What starts out as a small data quality issue, like a duplicate record here and there or outdated info can become a much larger problem.

It's critical to invest time, money, and resources to improving and maintaining data quality now rather than later.

Fortunately, there are data cleansing tools made specifically for Salesforce that make the process quick and easy.

A good data cleansing and management tool should be flexible, easy to use, and give you the ability to:

- Set up and implement out-of-the-box with no need for IT involvement
- Make configurations that satisfy your unique needs
- Automate data cleansing tasks with little to no manual work
- Integrate and sync data from multiple sources
- Collaborate and divide up tasks with multiple users
- Audit and view historical reports to monitor your progress

Optimizing Salesforce data requires a little heavy lifting upfront (after all, it's not a "one size fits all" approach), but it comes with a huge payoff.

When your Salesforce data is clean and routinely maintained, your team will have the power to improve processes. They'll be equipped to make more proactive and strategic decisions. And they'll be able to better serve customers overall.

Before you know it, you'll gain insights you didn't know you were missing. And such clarity can transform your organization and usher in a new era of business growth.

**Clean your data and
take your business to
the next level.**

Try Cloudingo free and find
out how dirty your data is.

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