

eBook

# *Data Symphony:* **HARMONIZING SUCCESS WITH SALESFORCE QUALITY**





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# SETTING THE STAGE FOR *Data Harmony*



Welcome to the symphony of success where data takes center stage. In this eBook, we embark on a journey to understand the pivotal role data plays in orchestrating business success.

Salesforce data drives informed decisions, sales growth, improved marketing programs, and enhanced customer satisfaction.

*Music to your ears*



The Prelude

# THE COST OF POOR Data Quality

According to Salesforce:

Poor data quality costs 30% of the average company's annual revenue ([source](#)).

Uncover the hidden costs:

Think missed opportunities, decreased productivity, reputational damage, and lost operational efficiency. Picture the disruptive impact of dirty data and set the stage for the transformative journey ahead.



# The Costly Discord

## CONTINUED...

### Reputational Damage

Communication errors stemming from inadequate marketing segmentation and disjointed customer profiles can tarnish the company's reputation, erode trust, and strain relationships. Bad data disrupts the harmony of customer interactions.

### Missed Sales Opportunities

Salespeople grapple with inaccurate prospect data, causing them to spend less than 30% of their time selling ([State of Sales Report, Salesforce](#)). This dissonance leads to missed opportunities and revenue loss.

### Decreased Productivity

In the business ensemble, inconsistent Salesforce data disrupts teams, steering them away from core responsibilities and detrimentally affecting decision-making. It's a dissonance that squanders time and hampers the harmony of effective business operations.

### Lost Operational Efficiency

Inefficient workflows emerge from poor-quality data, demanding extra time and effort to navigate, ultimately diminishing overall operational efficiency. It's a disruption that throws off the balance of streamlined processes.



# UNLOCKED BUSINESS OBJECTIVES WITH HIGH-QUALITY *Salesforce Data*

“92% of analytics and IT leaders agree the need for trustworthy data is higher than ever.”

-[State of Data and Analytics Report](#), Salesforce

Witness the curtain rise on unlocked business objectives powered by high-quality Salesforce data.

- ✓ Accurate reporting and analytics
- ✓ Effective marketing campaigns
- ✓ Enhanced customer experience
- ✓ Sales pipelines management
- ✓ Compliance and data governance

### ✓ Accurate reporting and analytics

Leverage high-quality Salesforce data to harmonize accurate reporting and analytics. Transform your decision-making process with better insights, precise metrics, and easily digestible data. Let the symphony of quality information guide your business decisions, eliminating guesswork.



### ✓ Effective marketing campaigns

Elevate your marketing campaigns with personalized segmentation. A clean record ensures a more productive and efficient workforce, enabling better evaluation of marketing spend. Say goodbye to time wasted on duplicates, and let the rhythm of quality data enhance the effectiveness of your marketing strategies.

### ✓ Enhanced customer experience

Strike a chord in customer engagement with detailed profiles derived from high-quality Salesforce data. Compose a symphony of customer habits, anticipate their needs, and personalize service. Let the harmony of clean records resonate in building stronger, more meaningful relationships with your customers.

### ✓ Sales pipelines management

Unleash the potential of your sales pipelines with a symphony of visibility. Clean data takes center stage, enabling quick identification of opportunities, avoiding risks, and identifying areas for growth. Let the rhythm of data quality be the soundtrack to seizing every business opportunity.

### ✓ Compliance and data governance

Achieve less fragmentation and more organization in your data landscape. Sync, standardize, and integrate datasets to create a complete picture, allowing you to keep a pulse on your organization's initiatives. The orchestrated data governance symphony ensures compliance and harmony in your business processes.

# CRAFTING A HARMONIOUS PLAN FOR *Holistic Data Quality*



9 practices to ensure your organization's data remains valuable throughout its journey.



1

## *Identify Your Data Needs*

Before crafting a data quality strategy, resonate with the needs of your organization. Understand the desired reports, analyses, and metrics. Set the stage for a symphony of data by aligning it with your organizational goals.

2

## *Establish the Right Standards*

Having identified data needs, establish quality standards. Define levels of accuracy, completeness, timeliness, validity, and consistency for each data type. Maintain by regularly reviewing and updating these standards.

3

## *Set Instructions for Reporting*

Compose reporting processes to track data accuracy. Define how errors are reported, who reports them, and establish responsibility for resolution. Let the clear instructions create harmony in your data management.



4

### *Regularly Tune In on Performance*

After setting up reporting processes, monitor performance regularly. Analyze trends, identify gaps, and take corrective action when needed. Keep the symphony in tune, preventing deterioration in data quality.

5

### *Adjust Strategies with Priorities*

As organizational needs evolve, adjust data quality strategies accordingly. Stay ahead of the curve by adapting to industry trends and best practices. Let the symphony remain dynamic, ensuring data value throughout its lifecycle.

6

### *Data Governance & Ownership Sonata*

Salesforce Admins play a crucial role in the data symphony. Establish a clear data governance policy with designated roles for clean and up-to-date data. Let ownership and control be the guiding notes for data accuracy.





7

### *Monitor Your Data Accuracy*

Closely monitor all data sources to maintain the integrity of fields and records. Validate information before using it in campaigns. Ensure the melody of accurate data resonates throughout Salesforce.

8

### *Analytics & Automation*

Use analytical tools to understand customer needs and segment data effectively. Automate processes like lead scoring for quick and accurate identification of qualified leads. Let automation tools maintain consistent standards.


9

### *Integrate Data & 3rd Party Solutions*

Keep the harmony by integrating your data from external solutions into Salesforce, thus creating a single source of truth. Use 3rd party solutions to streamline that process and keep ongoing data clean.

# PURSUIING HIGH~QUALITY DATA WITH *Cloudingo*

See how data cleansing transforms the quest for high-quality data into reality. Cloudingo steps into whatever tune you are playing and helps keep things in harmony as the tune evolves into the perfect melody with your entire tech stack. Our sole focus has been and always will be to improve your data quality.



“My organization pursued Cloudingo because we had many to 1 duplicate records. The standard 3:1 merge capability of Salesforce would have taken months of man hours to clean up our records. We were able to merge hundreds of duplicates with a single click!”

- Meagan B (Current User)

*Let's jump into features...*



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# AN ALL~IN~ONE

Act 3

## Data Management Platform

### Dedupe import files

Upload .csv files and scan for duplicates, create new records, and update ones that already live in Salesforce.

### Validate addresses

Stop losing money by mailing to undeliverable addresses by verifying and appending U.S. addresses.

### Merge & convert records

Merge duplicate records without losing data. Control how records are merged using customizable filters and flexible rules.

### Real-time merges

Ensure data is always clean by merging duplicates in real-time or scheduling automation to run whenever you want.

### Detailed reporting

Keep tabs on your data cleansing process so you can identify trouble areas and stay ahead of dirty data.

### Find & export data

Match data on a .csv file to records in Salesforce and pull back any data points from Salesforce into an exportable report.

### Undo & restore merges

Unmerge Salesforce records that were previously merged in Cloudingo and return them to their original state.

### Transform & update fields

Update, delete, and manipulate fields for large groups of records using customized rules.

### Connect systems via API

Shuttle data from external sources (LeanData, MuleSoft, Oracle, etc.) through Cloudingo to Salesforce to leverage master data management.



# 10-Day FREE TRIAL

Create a masterpiece of data quality in Salesforce with Cloudingo – a symphony that resonates with accuracy, completeness, and effectiveness. Follow these harmonious practices to ensure your organization's data remains valuable throughout its journey.

[Start your free trial now.](#)

