

6 steps toward top data quality

Abstract

Don't let bad data undermine your Salesforce CRM project—or your success as a company. Get your data under control with the approaches outlined in this paper.

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Industry analysts point the finger at bad data as one of the top three reasons why CRM projects fail. Because bad data leads to misleading, incomplete, and confusing information, it lowers adoption—another major reason why CRM projects fail.

Accurate information and reports are the life blood of an effective sales force. Without it, management doesn't have the data to make good decisions, sales reps don't have the tools to turn leads into customers, and the company will find it difficult to reconcile CRM data with data in other systems. The result? Lost opportunities and revenue, frustrated users and customers, and a lack of user adoption.

How to boost data quality

To ensure consistently high data quality, you'll need to train your users, create and implement a data quality process, and use available technologies to automate the process whenever possible. Here's a six-step approach that's working for many of our customers:

1. Profile your data

Data profiling is all about understanding your data. You should know where your data comes from: spreadsheets, backend systems, or sticky notes all over reps' desks. Take an inventory of your data that includes the following information:

- :: List your data sources and the names of the fields in which data is stored.
- :: Note any potential problems with your data. Do you have automated quality checks before a new record can be saved? Are all fields mapped correctly? For example, the information in the Company field in Microsoft applications usually belongs in the Account field in Salesforce CRM.
- :: In Salesforce CRM, make sure there's no duplicate information between objects (such as Accounts, Opportunities, and Contacts) and fields (such as State, City, and so on).

2. Control your data

Data control is about achieving data accuracy *and* ensuring the right users have access to the right information, which also means blocking access, as needed. To control your data, you first need to clean it by removing duplicates and errors, and then set up processes and use technologies to keep it clean.

- :: Use automated routines or tools to clean your data. You'll find several of these tools on the Force.com AppExchange.
- :: Prioritize your data cleanup effort. First fix data that's highly visibly and frequently used, such as addresses and emails. Fix business-specific information next, such as Opportunity types and stages. Finally, remove any duplicate fields; for example, don't repeat Account information in the Contact object.
- :: Get your users to fix their data. You can help by using Salesforce CRM's validation rules to alert users when data records are incomplete or don't conform to data-quality standards.
- :: Use exception reports and data-quality dashboards to remind users when their Accounts and Contacts are incorrect or incomplete. Scheduling a dashboard refresh and sending that information to managers is a great way to encourage compliance.

Another data-control challenge is making sure that data ownership and sharing works for your organizational structure.

- :: Review your profiles and role hierarchy and make sure the hierarchy, teams, and groups are kept up to date.
- :: Meet frequently with management to keep up with organizational changes.
- :: Define the Create, Read, Update, and Delete (CRUD) rights for each profile to ensure users can work with data, as needed.

3. Integrate your data

Most organizations have data in more than one system. Whenever there's duplicated data in several systems, it's easy for information to get out of synch. One way to avoid this problem is to integrate your systems so that updates in one system automatically update the others, resulting in a single source of "truth" and making it easier for end users to access information.

- :: Integration was once a huge headache. No more. Salesforce.com offers native connectors to SAP and Oracle systems for easy integration of customer-master records. And the Web services API can be used for any integration scenario. There are also dozens of integration partners ready to help with any integration need.
- :: It's easy to learn about and access the Salesforce CRM data model with our [Web Services API Developers Guide](#).
- :: When designing your integration, evaluate your business applications to determine which one will serve as your system of record for the synchronization process. The system of record (or master) can be a different system for different business processes.
- :: Integrate your order entry and fulfillment applications to Salesforce CRM for a 360-degree view of your customers.

4. Augment your data

To make your CRM system even more valuable, augment your data with information that will give your salespeople and managers an edge. For example, a number of third-party organizations such as Dun & Bradstreet and Hoover's provide valuable information your reps can use to prepare for sales calls. Also make the most of internal market intelligence, such as purchasing patterns or competitive analyses.

- :: To understand what data is valuable, survey your sales and marketing users to see what they want the most.
- :: Check the AppExchange to find partner solutions that can augment your data with external information.
- :: Get internal information about your customers' behavior and buying patterns. Then evaluate whether this information would be helpful to your reps.

5. Monitor your data

Achieving high-quality data isn't a one-shot effort, but requires ongoing vigilance. Establishing policies, processes, and tools for monitoring data is crucial to maintaining data quality.

- :: Define a centralized process for mass data loads and data-cleansing projects. Both the Force.com platform and the AppExchange include tools that can help with importing and cleansing data.
- :: Use workflow, validation rules, and Force.com code to enforce critical business processes.
- :: Create reports and dashboards to monitor data quality. Be sure to leverage free data-quality dashboards available on the AppExchange. By making data quality widely visible, you help make it everyone's responsibility.

6. Assign ownership, train users, & commit to a data-quality process

Users need to know the importance of data integrity and how to do their part in any data-quality initiative. In training users, show them how data quality directly affects their work. It's also a good idea to assign ultimate responsibility for each region's data to a super user, geographic lead, or other business owner.

The bottom line

Bad data is bad for business. Achieving and maintaining high-quality data requires vigilance, good processes, and a little help from technology—including the features in Salesforce CRM, tools from the Force.com platform, and solutions from our partners on the AppExchange.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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