

salesforce

The Data 360 Fast-Start Playbook

Proven advice to fix messy data,
power AI, and drive ROI fast



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Your Data. Your Adventure.

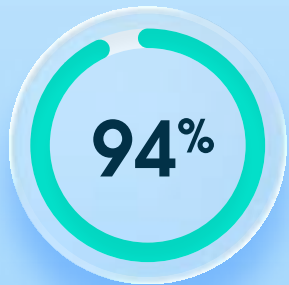
Don't feel like reading whole guide front-to-back? You don't have to. Scan the contents below, click on your biggest data headache, and jump straight to the solution.



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Before You Invest in Data 360, Read This...

The best data projects start with a business problem that keeps someone up at night. When you work backward from “What if sales reps can have 20% more time to make sales calls?” instead of starting with, “How do we unify our data?” something shifts. Suddenly, you're seen as a benefit driver, rather than someone excited about the latest technology.



Today, **94%** of business leaders say they're not using all the data they could to help go-to-market (GTM) teams understand and interact with their customers, whether for AI, business intelligence, or personalization.

That's not a data problem. It's an activation and a contextual one. At its core: there's a disconnect between the work that happens in the systems and workflows your teams use to engage with customers and the data out there in the wild – in data lakes, warehouses, and siloed ecosystems that most of your teams can't access but need for better decision-making, personalization, or AI.



We've all seen variations of approaches to solving this disconnect. The projects that promise the moon and deliver spreadsheets. The migrations that take years. The “transformations” that transform nothing but the IT budget.

We've been in the trenches, sometimes making mistakes, always learning, and occasionally getting it correct. And if you're looking for advice from practitioners who have successfully implemented Data 360 and realized value from it – without boiling the ocean, without costly and timely data migrations, without destroying their budgets – then this candid guide is for you.

We're not here to sell you anything. We're here to tell you what actually worked and what didn't. This is the guide we wish we'd had when we started.



What You Will Learn

- **What “good” looks like in real dollars and hours saved.**
(Chapter 1: Real ROI, Right Now)
- **How to think through and create effective use cases before you make the investment in Data 360, so you can hit the ground running and get results.**
(Chapter 2: Use Cases)
- **The top architectural decisions you should think through to build your use cases.**
(Chapter 3: Architecture)
- **Ways to mitigate risks and control costs without compromising results.**
(Chapter 4: Reducing Risks)
- **How to pitch a Data 360 trial to your CFO in a way that she can’t possibly refuse.**

How to Use This Guide (Choose Your Own Adventure)

You don’t have to read this guide front-to-back, unless you want to. We designed this to be a “choose-your-own-adventure” for data success. Jump straight to the chapter that solves your biggest headache today. Read what you need, grab the tools, and get to work!

Angélica, Anu, Dustin, Mehmet



Meet Your Datablazers

Before you dive into the playbook, meet the experts guiding your journey:



Mehmet Orun
Chief Strategy Officer &
Community Group Leader

The Vibe: Direct & Fast-Paced

Why you need him:

Mehmet is your shortcut to ROI. While everyone else is stuck in endless “data cleanup” phases, he shows you how to take the imperfect, fragmented records you already own, clean them up, and turn them into unified customer profiles and time-saving AI agents in under a month.



Angélica Buffa
CTO & Community
Group Leader

The Vibe: Candid,
Human-Centric & Strategic

Why you need her:

Angélica is the ultimate reality check. She’ll stop you from building abstract tech projects no one uses, showing you exactly how to target real moments of customer pain so your first pilot is an undeniable, high-impact win.



Anu Pandey
Practice Director &
Community Group Leader

The Vibe: Highly Technical &
No-Nonsense

Why you need her:

Anu is your defense against the budget black hole. She delivers the unvarnished truth on navigating Zero Copy architecture, dodging implementation traps, and pitching a low-risk pilot to your CFO without asking them to pay for bad “IT plumbing.”



Dustin Armond
CTO & Community
Group Leader

The Vibe: Practical & Blunt

Why you need him:

Dustin is the enemy of manual bottlenecks. He gives you the operational blueprint to stop marketing to “half-profiles,” completely bypass the three-day SQL coding marathons, and give your teams the agility to build and launch campaigns in hours, not days.

Chapter 1

Real ROI, Right Now: See What's Possible and How to Achieve it



Chapter 1

Real ROI, Right Now: See What's Possible and How to Achieve it

By Mehmet Orun and Dustin Arnold

What You Will Learn

Through real-world Data 360 success stories, you'll discover what is possible with Data 360 and how to get value quickly.

-  Mehmet's "Many Sams" story shows how to turn fragmented records into a unified profile, using the data you already have. See how his team powered a low-risk AI agent to cut sales research time by 20% and instantly identify junk leads.
-  Dustin reveals how he helped a marketing team combine Data 360 and Agentforce to drastically reduce duplicate records. Learn how they replaced three days of manual SQL coding with hyper-targeted, same-day campaigns.



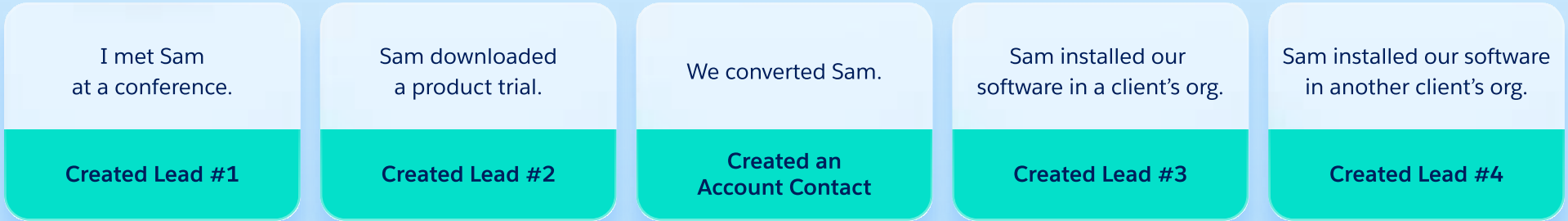


Solving the “Many Sams” Problem

By Mehmet Orun

Let me tell you about a problem that was driving our sales team crazy.

We had a great customer named “Sam.” But we didn't have ONE record for Sam. We had *many* Sams in our system:



The Problem

When we'd get a new lead for Sam, we'd need to know if this was:

- A cold lead seeing our product for the first time.
- A hot prospect who'd already engaged five times.
- An existing customer who was expanding their use of our products.

This problem was everywhere, and it was stifling our sales efficiency. Our reps wasted 15 minutes before every outreach effort just trying to piece together the latest insights and figure out exactly who they were talking to.




The Fix: Data Connected, Not Cleaned

Here's what we didn't do: We didn't manually merge those five lead records. That would have been the wrong approach because we would have lost the vital business context behind each engagement. We also skipped the traditional six-month data quality initiative.

Instead, we:

- 1 Assessed our data** using an AppExchange solution (Cuneiform) and used the evidence to secure leadership buy-in and alignment. Specifically, we:
 - Quantified customer data completeness risk.
 - Identified invalid leads.
 - Demonstrated we understood the problem and how to tackle it.
- 2 Used Data 360 to create a Unified Profile** that linked all past and future “Sams” together by:
 - Unifying customer profiles from Agentforce Sales and Agentforce Service, Account Engagement, and legacy marketing data.
 - Filtering out the noise with Data 360 data transform to ensure we only use relevant data.
 - Bringing together insights from emails, chatter, Slack, and case, and opportunity records.

This all meant no loss of context. No risk of incorrect merges. No more wasted sales research.
- 3 Enriched the profile** using an AppExchange partner (Moody's Analytics) to add:
 - Company revenue data.
 - Industry classification.
 - Firmographic details.



Time to implement: less than four weeks, from start to finish, with a part-time team.

- Less than one hour to set up applications from the AppExchange.
- Less than one day to perform the data assessment, demonstrate the need, and justify recommended architecture to unify customer profiles.
- Less than one week to unify our CRM data.
- Two weeks to migrate from HubSpot (with a custom connector; before there was a standard connector).

Our goal wasn't just to unify the data, but also to activate it. So we built an AI agent specifically to save our sales team precious time.

Instead of forcing reps to manually dig through dozens of emails, Chatter posts, and transcripts, the AI agent took over. It automatically scanned all that unstructured data to instantly surface exactly what they needed.

Our ROI was the amount of sales rep time saved as well as accelerated revenue. During the pilot, we tracked how many Data 360 credits were used to answer a question, to establish our cost-per-value baseline. This approach was low-risk, allowing us to experiment without a large financial commitment.

So, to Sum It All Up

Before

- 1 A sales rep opens the lead for Sam or an opportunity for Sam's company.
- 2 He reviews next steps and interactions for the prior two weeks.
- 3 Sometimes, he finds an email from two weeks ago with a follow-up gap.
- 4 Eventually, the rep completes the needed next step.

Total time: 15-30 minutes

After (With AI Agent)

- 1 The sales rep opens an opportunity for Sam's company.
- 2 The AI agent analyzes his interaction summary and shows who has which outstanding item.
- 3 The rep verifies and sends the required follow-up.

Total time: 30 seconds



The Business Impact

Metric	Before Data 360	After Data 360	Impact
Lead Prioritization	Manual lead research and cleanup	Automated filtering of junk leads (35% eliminated)	Immediate focus on meaningful leads
Research Time	15-20 minutes to piece together context	Seconds (Complete context available instantly)	20% more time to focus on selling
Customer Context	54% completeness risk due to fragmented views	100% unified view (emails, Slack, cases, and leads in one profile)	Consistent, single-customer view across all records

Key Principles to Keep in Mind

- **Understand your data’s actual state.** This is critically different from its ideal state. If you don’t understand your data, how do you know if you can trust it or what solutions would help you better manage it?
- **Understand your users.** Sales reps often don’t enter data unless it clearly supports faster selling. Use enrichment and agentic summaries to deliver just-in-time insights.
- **Implement small, meaningful solutions.** Assessing our legacy and CRM data taught us our risk and need. Solving a sales rep problem proved the platform.





The Playbook: Ditching the SQL Grind for Smarter Marketing Automation

By Dustin Armond

If you run marketing across different brands, you probably know the headache of having your customer data scattered everywhere. Here's how we solved this and updated the workflow across our ecosystem.

The Challenge: Marketing to “Half-Profiles”

Sarah is a consulting client of mine and a Marketing Manager. She handles two different brands, but her setup was complex. Her company's customer data was trapped in two Salesforce orgs that both fed into one marketing email tool.



Because the systems didn't talk to each other through traditional means, a huge 30% of their database was just duplicate records. We were marketing to what I call “half-profiles.”

Even worse was the “SQL Grind.” Every single time Sarah wanted to send a campaign, her team had to spend three full days writing or updating SQL to pull the right list of customers. When their busy season hit, it was a nightmare to keep up.

The Pivot: Building Instead of Coding

She realized this workflow wasn't sustainable as their customer base continued to grow YoY. She needed a single source of truth and the ability to access that effectively and efficiently. So, we used Data 360 to connect both of her Salesforce setups.

Here's how we changed the game:

- 1. Created Unified Individuals:** We merged all those duplicate “split personalities” into single, clean, marketable profiles. This quickly reduced our 30% duplicate rate.
- 2. Ditched the Code:** We took away the need for constantly writing or recycling SQL queries. We gave Sarah's team a Visual Segment Builder. Now, they have a better visual representation of their data and can just click and drag to build their audience lists.
- 3. Automated the Refreshes:** These audience segments now update themselves automatically every single day and push straight to the marketing tool.

The Secret Weapon: Our AI Consultant

Once we had all the data in one place, we brought it into Agentforce. Because the data was unified, Sarah could now use Agentforce like a “Cross-Org Consultant.” Without leaving her home workspace, she was able to make instant, smart decisions after asking the AI questions about how both brands were performing.

A Quick Tip on Consent

If you do this, pay close attention to your customer consent data. Because we merged data from two brands and sunset a legacy consent tool, we had to completely rebuild our preference strategy to ensure we were respecting our customers' email choices.

Before

- 1 Marketing decides to run a new promotion.
- 2 Sarah’s team submits a request for a customer list.
- 3 A technical specialist spends hours writing and adjusting SQL queries to pull the right audience.
- 4 The customer data points are fragmented and aren’t reusable across brands because the data only contains “half-profiles.”

Total time: 3 Days

After (With Data 360 & Agentforce)

- 1 Marketing decides to run a new promotion.
- 2 Sarah uses the Visual Segment Builder to create the audience herself.
- 3 Sarah asks Agentforce for instant context on how the other brand is performing to help guide her strategy.
- 4 The campaign launches to a clean list of unified customers.

Total time: Same Day



The Final Results

What We Measured	Before Data 360: The Mess	Before Data 360: The Success
Manual Work	3 days of coding a week	Zero (automated daily)
Data Quality	30% duplicates	100% unified profiles
Speed/Agility	Blocked by technical SQL gates	Instant visual building
Insights	Blind to the other brand	AI gives cross-brand answers
Intelligence	Siloed by org / manual reporting	Cross-org insights (via Agentforce)



Confessions of a Datablazer

How to Hack Fast ROI with Data 360

Skip the SQL grind and ignore the messy data you don't need. Watch Mehmet and Dustin explain how to speed up your sales pipeline and achieve same-day marketing agility in weeks.



Check out more Data 360 success stories

Learn how FedEx captures [+2,000% ROI](#) by turning data into action with Data 360.



See how Pacers Sports & Entertainment [turns fan data into delight](#) with Data 360.



Explore how [AI and unified data](#) help UChicago Medicine scale care.



See how Northern Trains [realized 138% ROI](#) with Data 360.



Top Takeaways

- ✔ **Target your best data – skip the ocean-boiling.** You don't need a six-month, enterprise-wide data quality initiative to see results. You only need the right data to power your specific use case. Link the good data you have today, and leave the rest for future optimization.
- ✔ **Pitch the CFO on outcomes.** Sell your project based on increasing revenue and productivity, cutting costs, or maintaining compliance. Make it an easy “yes.”
- ✔ **Empower your marketing teams by replacing manual SQL coding with Data 360's Segment Builder tool** to reduce campaign launch times from days to the same day while eliminating duplicate data.
- ✔ **Always reassess customer consent when unifying cross-brand data,** because merging customer records often requires you to rebuild preference pages from scratch to ensure you are legally respecting their communication choices.

Chapter 2



How to Build Your First Use Case

Chapter 2

How to Build Your First Use Case

By Angélica Buffa

What You Will Learn

-  How you can make the most of the data you already have – even if it's imperfect.
-  Strategies to pick a winning project that your team actually cares about.

Practical tools you can use

Download our use builder worksheet to start developing your first Data 360 use cases.





Vulnerability is Your Data Superpower

Your data doesn't have to be perfect to get started on your Data 360 journey. And honestly? It never will be. This is one of those truths we don't talk about enough in our industry. We act like we need everything figured out before we begin. But all you really need is a use case, clear business questions, and a well-thought-out strategy to see you through.

Let us be honest with you. The successes Mehmet and Dustin shared in the previous chapter didn't happen because his company had perfect data or flawless execution. They happened because they had clarity about what they were trying to achieve and the courage to start anyway.

Here's what I've learned working with teams across different organizations: vulnerability is your superpower. When you're honest about what you don't know, you create space to figure it out together. The projects that fail aren't the ones with imperfect data. They're the ones where everyone pretends everything is fine when it's not.

What Makes a Good Business Use Case?

A good business use case isn't just a technical document. It's a shared understanding between people who need to trust each other to make something valuable happen.

It should:

- **Identify a user persona** and a specific action they need to take (because real people will use this).
- **Describe the desired business outcome** in measurable terms (so everyone knows what success looks like).
- **Help identify the data, signals, and context** needed to achieve the outcome (being realistic about what you have).
- **Enable gathering of constraints or gaps** that may affect delivery (honesty about obstacles).
- **Provide an entry point for architecture decisions** (a foundation for technical choices).



How to Select Your First Use Case

Human judgment is key to achieving your goals with AI and data activation. Trust, transparency, and alignment are key to selecting a use case that will actually succeed.

Ask yourself these questions, and be honest with your answers:

1. Where are the pain points?

- Where are staffing shortages, process inconsistencies, or data disconnects slowing you down?
- What business problems keep your team up at night?

2. Who needs this data?

- Who depends on this data to deliver results?
- What questions is the data answering?
- Are key stakeholders at the table for this conversation? (They should be.)

3. What's at stake?

- What business KPIs are negatively impacted (Sales, Time to Close, Operational Costs)?
- What happens if you do nothing?

Prioritize use cases based on the KPIs that are most effective for business

But here's what's equally important: pick a use case where your stakeholders are aligned.

Misalignment rarely looks like a loud argument in a boardroom. Usually, it looks like the VP who smiles, says “sounds great,” and then quietly pulls your funding two weeks later. Or it looks like the team leader who never even got asked for their opinion.

Here's the secret: The real signal that you have buy-in isn't cheerful enthusiasm. It's when people start asking really hard questions. Why? Because that means they're actually thinking about how to make the project work in the real world.

Before you lock in your use case, look around the room and ask yourself: Who has the power to slow down or completely kill this project? If those people aren't sitting at the table with you, stop right there. Getting them in the room is your very first action item – not the data audit and not the technical scoping. Get them in the room.

The 4-Step Evaluation Framework

Once you've done the work above, use a structured way to evaluate which project to tackle first. We use a sustainable, four-step methodology to narrow our ideas down to the winner:

1 Define the customer journey

Pinpoint exactly who's experiencing the friction (e.g., a specific employee, supplier, or customer).

2 Select the moment of pain

Identify a specific moment in that person's journey where better data will directly improve revenue, cost, or compliance.

3 Evaluate 2-3 Candidates

Don't just pick the first idea. Put a few options side-by-side and grade them based on their probability of success, potential business impact, and time to value.

4 Map the Requirements

Once you have a winning candidate, clearly define the specific goals, technical capabilities, and exact data sources (1st party, 3rd party, signals, and context) required to bring it to life without over-engineering the solution.

Your Turn: See the Use Case Framework in Action. Then Build Your Own Use Case

Rather than getting lost in theory, let's apply these exact criteria to your own business. To help you get started, we put Mehmet's "Many Sams" sales use case into this exact framework.

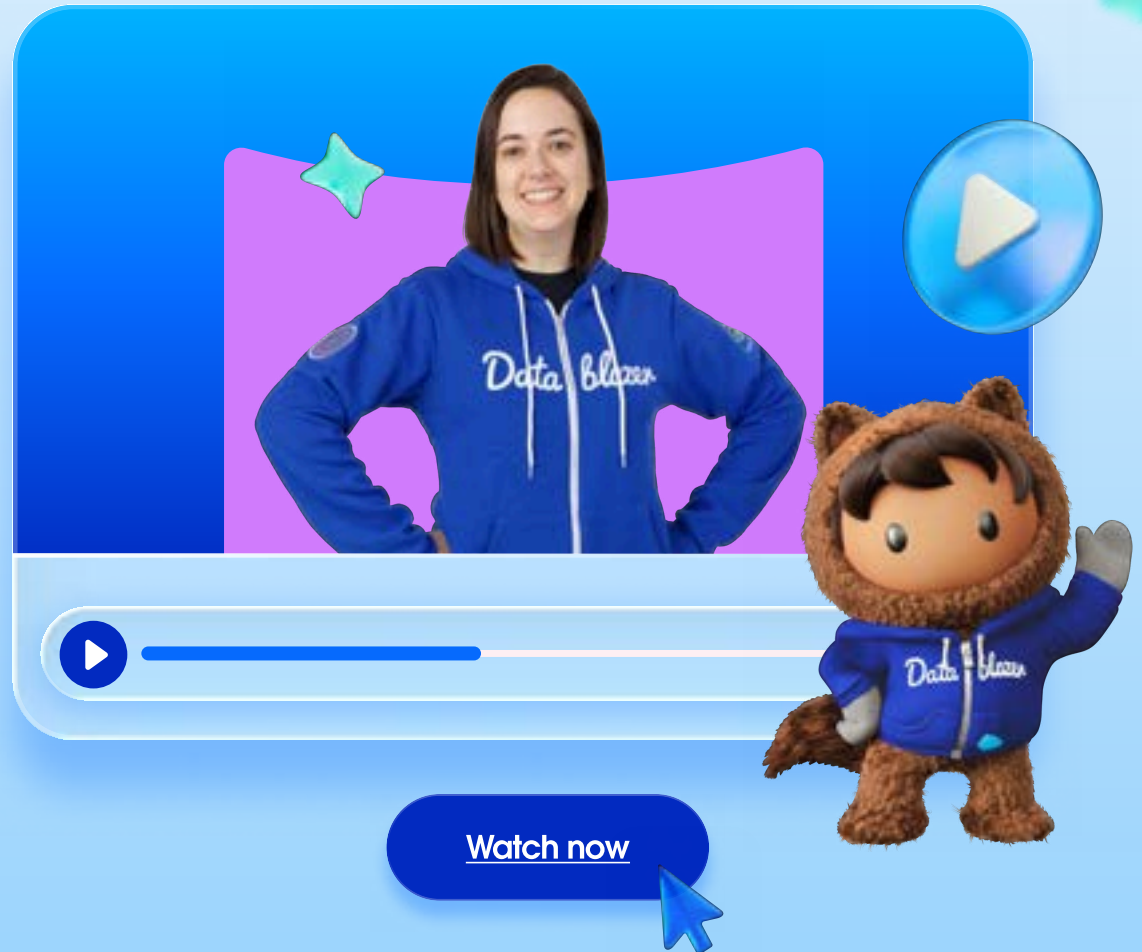
Download the "Use Case Builder Worksheet" to see exactly how Mehmet mapped out his persona and data requirements and evaluated his candidates. Then use the blank template to build your own use cases.



Confessions of a Datablazer

How to Overcome the “Perfect Data” Trap

Don't let the pursuit of perfect data stop you from getting started. Watch Angélica explain how to prevent execution disasters by acknowledging your data gaps on day one and being smart about cleaning only the data required to increase your business outcomes.





Top Takeaways

- ✓ **Vulnerability is a superpower.** Be honest about what you don't know and where your data is messy. It will prevent huge disasters later on.
- ✓ **Find the pain.** The best use cases fix a specific moment in the customer journey where bad data is losing you money or wasting your team's time.
- ✓ **Get your people aligned.** You don't need total agreement on how to fix the problem, but everyone must agree on where you are headed and why.

Use Case Resources

- [Use case builder worksheet:](#) Use this framework to develop your first use cases.
- [Data 360 Use Cases trail:](#) Get the most out of Data 360 for Sales, Service, Marketing, and more.
- [Data 360 use case library:](#) See what you can do with Data 360 – discover more than 36 industry-specific use cases.

Chapter 3

The Architecture: Making Your Use Case Real

Chapter 3

The Architecture: Making Your Use Case Real

By Anu Pandey

What You Will Learn

- 🎯 **How to solve real business problems** with Data 360 without waiting for perfectly clean data or copying your entire data warehouse.
- 🎯 **The true story** of how a data company used a smart setup (and a “Triangle Comparison”) to uncover hidden sales and build a revenue engine.
- 🎯 **Four essential architecture rules** every CIO needs to lower project risks, control costs, and prove value in months instead of years.
- 🎯 **The secret to blending your data types** (like hard numbers and messy emails) to give AI the real-world context it needs to actually work.



Every CIO wants to know: how do we handle messy data? The answer? It's about setting up your systems to match how your business actually works in the real world. You don't need to copy your entire data warehouse. You just need to solve a specific problem.

To see how powerful this approach can be, let's look at a real company that stopped trying to fix all their *entire* data ecosystem and instead, just focused on finding their missing revenue.



Finding Missing Money in the “White Space”

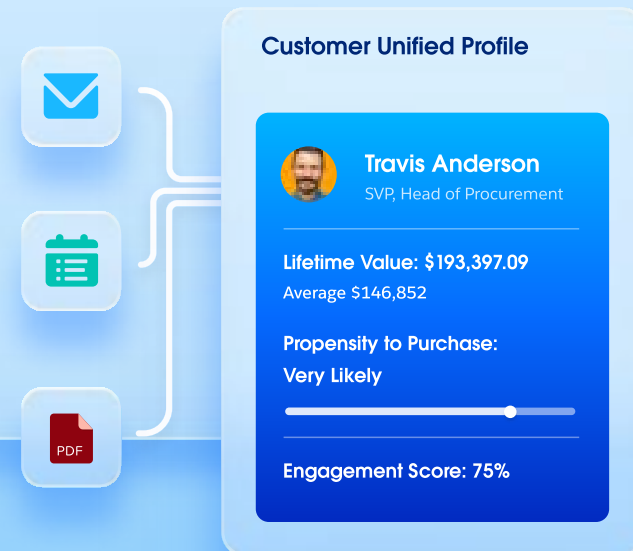
A client of mine, a company that sold data, was missing out on huge sales. Their reps couldn't figure out what new products to offer their clients. Why? Because the representation of a brand and company wasn't consistent across systems. We couldn't connect a “brand” to its “parent company.” The data was scattered, so reps couldn't answer a simple question: ***What data are customers NOT buying from us for products they're actively selling in stores?***

Usually, fixing this takes 18 months and over \$2 million to build a giant, perfect new database. Instead, they took a smarter, faster approach using four strategic decisions:

Decision 1: The Overall System Setup

They didn't build a massive new system. Instead, they did the following:

- 1. Cleansing:** Used Data 360 Transforms to fix inconsistent formats across different tables, turning scattered information into a clean, unified data model.
- 2. Identity Resolution:** Eliminated fragmented records by matching internal account data with ZoomInfo, giving teams one complete, unified view of every brand and company.



Decision 2: Data 360's Zero Copy

Zero Copy allows you to leave massive amounts of data in its original home (like Snowflake, Databricks or in this case, BigQuery) and view it remotely in Salesforce, avoiding the high costs of copying and moving it. By using this to combine external sales data with internal CRM data, the team controlled costs and used Identity Resolution to easily merge all their scattered records into one unified customer profile.

Decision 3: Richer Data for AI

To make everything searchable, I helped the team build search indexes and data graphs in Data 360 that connected all the dots between companies, brands, and sales. This created a solid foundation for AI agents to quickly help the sales team prepare quotes. This also allowed reps to provide feedback when a brand relationship was incorrect.



Decision 4: The “Triangle Comparison”:

We used unified profiles and aggregated sales data by UPC to create confidence scores for the differing brand/company combinations to produce a winner.

Finally, I helped the data product company build an automated tool that checked three things:

- What their clients bought,
- What their clients were allowed to see,
- What their clients actually sold in stores.

If the system saw a client was selling a product but hadn't bought the data for it, it instantly alerted a sales rep to close the deal.

This company didn't achieve these incredible results because they had a massive IT budget. They won because they had strategic discipline. You can use their exact playbook to build a smarter system for your own team. There are the four key principles you need to be mindful of.

4 Rules for Architecting Data 360 to Make Your Use Case a Reality

- 1

Start Small to Lower Risk

Connect just one to three data sources first. Focusing on a small, important project lowers your risk, saves money, and proves your idea works in months, not years.

- 2

Choose Your Connections Wisely

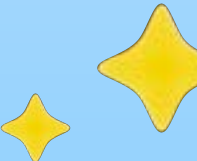
Batch ingestion for CRM data and Zero Copy sources are now free, meaning we didn't have to worry about the credit consumption of ingestion. We were therefore able to put more credits toward transforming data for normalization to ensure high-quality matches. Pick the right tools for your specific project. Don't recreate your data warehouse structure in Data 360; only ingest what's necessary.

Here's some general guidance to decide on your data connection strategy.

The Strategy	When to Choose It	The CIO Trade-Off
Zero Copy	For massive datasets living outside your network	Controls costs and stops data duplication but relies on your outside systems being fast
Salesforce Connectors	For linking your internal Salesforce products	Super fast setup and immediate value but only works for Salesforce data
Standard Pre-Built Connectors	For common outside systems (like Google Cloud or Amazon S3)	Quick and easy with minimal coding but follows a standard mold
Custom Connectors	For unique, highly complex source systems	Gives you maximum flexibility but costs the most time and money to maintain

Once you have chosen how to connect your data, your next critical choice is deciding how fast that data actually needs to move. This brings us to the debate between batch processing and streaming:

- **Batch processing** updates data on a set schedule. It's cheaper, easier to test, and perfect for things that don't need to happen instantly.
- **Streaming** updates data the second something happens. It's great for real-time actions, but it's much more complicated and expensive.



3 Only Fix the Data That Matters

Don't try to clean everything. Focus only on fixing the specific data errors that will actually break your project. You'll need to understand which data problems threaten your business goals to do this. But that understanding will make all the difference to your time to value.

Here's the Data Reliability Equation to help you decide what to fix and what to ignore:

The Risk	The Business Impact	The Strategic Fix
Unreliable Facts: You have messy, untrustworthy data fields	Inaccuracies: Your Agent won't hallucinate. It will just give you wrong answers based on the existing data quality	Exclude It: Use native tools to profile data and exclude irrelevant fields from Data 360, providing the AI Agent with richer customer and business context
Identity Crisis: The same customer looks totally different across source systems, with different data structures	Blind Spots: Your team gets fragmented views of the customer and missing engagement events for GTM teams, leading to missed revenue	Identity Resolution: Use Data 360's automated matching tool to link them up
Missing Links: You can't create a complete picture of your customer due to missing links in the data	Lost Revenue: You can't answer complex business questions (like finding upsell chances)	Data Transforms: Cleanse and derive relationships between disconnected tables
Inconsistent Formats: Systems speak different languages (like dates formatted differently)	Match Failures: The system fails to sync and requires manual cleanup	Normalize It: Use Data Transforms to make the formats match

4 Mix Numbers with Words (Structured vs. Unstructured Data)

The best projects use two types of data. Structured data (like transaction numbers and exact customer records) gives your AI Agent hard, verifiable facts. Unstructured data (like emails, case notes, and documents) gives your AI Agent the context it needs to actually understand the customer. You really need both to succeed.

Ultimately, a successful data architecture isn't about a perfectly clean data ecosystem. It's about making smart, agile choices that reflect your real-world business. By focusing on a specific problem and using the right tools, you can turn messy data into a powerful revenue engine.

Confessions of a Datablazer

Dispelling the “Magic Unify Button” Illusion

Many executives mistakenly believe they must spend millions to copy their entire data warehouse just to fix their messy data. Watch Anu explain why there's no magic “unify” button, and why you should stop boiling the ocean and instead – focus on your actual business reality





Top Takeaways

- ✔ **Don't boil the ocean:** Start with just one to three data sources to lower your risk and prove value quickly.
- ✔ **Leave data where it is:** Use a Zero Copy architecture to view massive datasets remotely without the cost of duplicating them.
- ✔ **Only fix what's broken:** Ignore minor data flaws and only correct the specific errors that threaten your project's success.
- ✔ **Combine your data types:** Use structured data (numbers and facts) and unstructured data (emails and notes) together to give the Agent the full picture.

Architecture Resources

- [Data 360 Architecture Guide](#): Take a deep dive into all aspects of Salesforce Data 360 architecture and how it powers unified profiles, trusted context for AI, and personalized customer experiences.
- [Trailhead Badge - Data 360 Connectors and Integrations](#): Learn how to connect your data sources and define their relationship in Data 360.
- [Trailhead Badge - AI + Data: Project Planning](#): Discover how to create strategy and prepare your data for AI projects.
- [Why Data 360's Zero Copy Makes Business and Technical Sense](#): Check out the ultimate resource to answer all your most pressing questions about Zero Copy.
- [Join the Datablazer Community](#)
Learn from and connect with other Data 360 users, mentors, and experts. Definitely take advantage of our in-depth Data 360 training ([Datablazer Mastery Onsites](#)) and monthly community meetups.

Chapter 4




Reducing Costs and Risk

Chapter 4

Reducing Costs and Risk

By Anu Pandey and Mehmet Orun

What You Will Learn

-  **The math behind Data 360's new Flex Credits model**, including the updated rate card and volume-based benefits.
-  **A real-world cost calculation** showing exactly how many credits it takes to automate 10,000 tasks under the new Data 360 Flex Credits model.
-  **The top 6 implementation risks**, from messy data to real-time additions, and how to avoid them.





Avoid the Budget Black Box

I've sat across from many CIOs who are ready to start a Data 360 implementation. They see the value, and they love the use cases. But right before they sign, they pause. They want to know exactly how much this is going to cost, and they're terrified of runaway software bills and tool sprawl. Why add another to the already large stack?

Pricing for modern data platforms can feel like a black box. As an architect, I've learned that controlling your costs simply comes down to understanding how the billing engine works, avoiding a few common traps, and making smart design choices.

Here is everything you need to know to confidently budget for Data 360 under the new Flex Credits model, and why the ROI is well worth the investment.

How Flex Credits Pricing Works (The Ultra-Simple Version)

Data 360 now uses a “consumption” pricing model with Flex Credits. Think of it like a utility bill for your data. You only pay for what you use. Your total cost comes down to three buckets:

- 1. Data Storage (The Trunk):** This is a flat, predictable monthly fee for storing your data. At just \$23 per terabyte a month, this typically has a minimal impact on your budget.
- 2. Consumption Credits (The Fuel):** This is the main cost driver. Every time you bring data in, mix it together, or use it to do something smart, “flex credits” are consumed. You buy these flex credits in bulk blocks, currently \$500 for 100,000 credits. Different actions burn flex credits at different rates, which Salesforce calls “multipliers.”
- 3. Premium Add-Ons (The Upgrades):** These are optional, fixed-cost upgrades for specific enterprise needs. For example, if you're a massive global enterprise and need separate ‘Data Spaces’ to keep your European brand data completely separated from your Asian brand data, you buy the Data Spaces add-on for this.

What's New with Flex Credits: Game-Changing Benefits

The new Flex Credits model introduces significant advantages.

- **Free Batch Ingestion:** Bringing data in through scheduled batch processes now costs \$0. This is a massive cost saver for most use cases.
- **Free Zero Copy Ingestion:** Accessing data in your data lake or warehouse without moving it is now free.
- **Free CRM data Ingestion:** CRM data is refreshed every 15 minutes.
- **Volume-Based Multipliers:** New tiered pricing rewards higher usage with better rates as you scale.
- **Updated Multiplier Rates:** The cost structure has been optimized to reflect real-world usage patterns more accurately.
- **Shared Credits for Data 360 and Agentforce:** Flex credits are fungible across Data 360 and Agentforce use cases, so you can shift investment as priorities shift.

The Math in the Real World: The Retail Returns Case

To see how this actually plays out under the new Flex Credits model, let's look at a practical use case developed by Khos Islam, a Data 360 Consumption Seller.

Imagine you're a retailer trying to automate 10,000 customer returns a month using an AI agent. How much does that cost in Data 360 flex credits? Here's the breakdown with the updated pricing:

- **Internal CRM Data:** To know who the customer is, the AI agent looks at your internal Salesforce CRM data.
Cost: 0 credits. Internal batch and streaming structured data ingestion is free.
- **Batch Ingestion (ERP Data):** The AI agent needs recent transaction history from your external ERP system. By pulling this in a nightly batch (30,000 recent orders), you take advantage of the new free batch ingestion.
Cost: 0 credits. Under the Flex Credits model, batch ingestion is now completely free.
- **Real-Time Processing:** When the customer actually initiates the return, the AI agent needs to respond instantly. Real-time actions carry a multiplier of 250,000.
Cost: 2,500 credits
- **Unstructured Data:** The AI agent reads a 5MB PDF of your company's return policy to answer the customer's questions. With the new multiplier of 150, this is significantly more cost-effective.
Cost: 750 credits
- **Zero Copy:** The AI agent checks the customer's loyalty status securely in Snowflake without moving the data. Under Flex Credits, Zero Copy ingestion is now free.
Cost: 0 credits

The Total: Your AI agent securely handled **10,000 customer returns for roughly 3,250 credits per month.** At \$500 per 100,000 credits, you're automating **10,000 human interactions for just \$16/month.** That is an incredible ROI.



The Top 6 Implementation Risks and How to Avoid Them

Data processing sprawl will burn through your gas tank. Costs only spiral when teams implement the platform without understanding how to optimize data structures, integration architecture, and data processing.

Here are the real-world risks and how to navigate them.

Risk 1: The “Figure It Out Later” Strategy (No Clear Use Case)

One of the most expensive mistakes you can make is saying, “Let’s just pull all our data in now, and we will figure out the use cases later.” Saying “we need unified data” is not a real business strategy. Because Data 360 locks in your data’s classification once it enters the system, a bad initial guess means you will have to pay credits to redo your data model.

- ✔ **The Fix:** Work backward from a specific, measurable business problem. Define exactly what data is needed to solve your challenge and how you plan to use the data before you ever bring it into the platform.

Risk 2: Ignoring the Free Ingestion Methods

Under the new Flex Credits model, both batch ingestion of external data and Zero Copy are completely free. Yet many teams still default to expensive real-time processing or duplicate their data unnecessarily, wasting money on operations that could cost nothing.

- ✔ **The Fix:** Make the most of using free external batch ingestion for scheduled data loads and Zero Copy for accessing large datasets in your warehouse. Only use paid ingestion methods like streaming ingestion of external data when the business case requires it. This strategic choice can eliminate the majority of your ingestion costs.

Risk 3: The “Real-Time” Addiction

Everyone wants their data in real-time. But real-time processing carries a premium multiplier of 250,000 under the Flex Credits model. Processing sub-second real-time events is significantly more expensive than free batch processing.

- ✔ **The Fix:** Batch is your best friend – and it’s free. Use zero-cost batch processing for historical data, and only use real-time for the exact moments that require a split-second reaction (like a customer using a chatbot).



Risk 4: Heavy Unstructured Documents

AI agents are amazing because they can read your company's unstructured data, like PDFs and policies. But unstructured data carries a multiplier of 150 and gets charged by the megabyte. If you tell the system to re-read and re-index a large policy document every time a comma changes, you'll burn through thousands of credits for no reason.

- ✔ **The Fix:** Only index unstructured documents when they change, and keep a close eye on your refresh schedules.

Risk 5: The Talent and Integration Gap

Connecting to complex, custom data structures isn't always plug-and-play and may require additional integration tools like MuleSoft. Furthermore, Data 360 demands a unique blend of abstract thinking and technical expertise, specifically in data architecture and systems thinking, to fully grasp the surrounding technology stack. The role isn't strictly that of an administrator or a developer, as Data 360 is a no-code platform. However, you must deeply understand the "why" behind your actions and know exactly which components to use to solve core business problems.

- ✔ **The Fix:** Invest in proper training for your team upfront, or partner with certified experts to set up your initial architecture. A well-architected system pays for itself by minimizing credit consumption from day one.

Risk 6: Broken Consent and Security Governance

When you unify data from multiple sources and feed it to AI agents, you run a huge risk. If an AI agent accidentally accesses and shares sensitive information, like PII, HIPAA, or GDPR-protected data, it can have a devastating impact on your business.

- ✔ **The Fix:** Turn on Data 360 Governance. Salesforce built this directly into the platform to make securing data easy. You can use AI Tagging to automatically label sensitive data, Dynamic Data Masking to hide Social Security numbers from users who shouldn't see them, and Policy-Based Governance to control exactly who (or what AI agent) gets access to what. You set the rules once with simple clicks, and Data 360 enforces them everywhere.

Treat your data architecture with the same strategic discipline as your business operations.

Filter out the noise. Choose the right fuel for the right engine—and take full advantage of the free ingestion options and fungibility under Flex Credits. Put strict governance in place. With these guardrails in place, Data 360 is a massive value driver. Use the checklist in the resource list below to keep your implementation grounded in reality. When you do, you'll deliver the kind of measurable ROI that keeps your CFO smiling.



Confessions of a Datablazer

Stop Writing Blank Checks for Cloud Data

Unpredictable cloud bills are terrifying, but the real financial risk is treating complex enterprise architecture like a basic admin task. Watch Anu reveal the top six implementation cost traps you must dodge to completely change the pricing math and take advantage of massive ROI.





Top Takeaways

- ✔ **Cost is tied to consumption. Consume strategically.** Your bill is highly predictable if you understand that batch processing is cheap, real time is premium, and unstructured document scanning can add up fast.
- ✔ **Ingesting bad data multiplies your costs.** If you bring messy, unfiltered data into Data 360, the system will produce unreliable results. Bring in only the data you need to support your use case, and make sure that data is clean before it enters Data 360.
- ✔ **Governance is mandatory.** As human and AI agents get access to your unified data, you must use Data 360 Governance to mask and tag sensitive information so it doesn't end up in the wrong hands.
- ✔ **Track your fuel gauge.** Use the free [Digital Wallet tool](#) to monitor your credit usage weekly, so you're never surprised by your bill.

Architecture Resources

- [Data 360 Pricing](#): Get an overview of how Data 360 pricing works.
- [Data 360 Pricing Calculator](#): Estimate Data 360 investment based on your industry, company size, and use case.
- [Salesforce Digital Wallet](#): Discover near real-time monitoring of your usage data for consumption-based Salesforce products, like Data 360.
- [On-Demand Webinar: Data 360: Flexible Pricing to Scale Data and AI with Confidence](#): Learn about three new flexible ways to buy Data 360: Data 360 on Flex Credits, Data 360 Profile Pricing, and AELAs.

Chapter 5

Take the Next Step: Pitch the CFO and the Board

Chapter 5

Take the Next Step: Pitch the CFO and the Board

By Anu Pandey, Dustin Arnond
and Mehmet Orun

What You Will Learn

- 🎯 How to build a financial case for Data 360 by leading with measurable business outcomes.
- 🎯 The exact CFO pitch template to present a compelling business case and a four to six week pilot framework.
- 🎯 A comprehensive playbook for dismantling the most common CFO and IT objections, including concerns about existing data lakes, integration costs, and compliance.



The Secret to Winning Budget: Pitch a Pilot, Not a Platform

Before you can pitch your CFO, you need to know exactly what you're pitching. The biggest trap in data activation is trying to build a massive, perfect data ecosystem before delivering any value. When you stand in front of the board, they want to see an achievable roadmap, not a multi-million-dollar tech gamble.

That is why you never pitch a full-scale transformation. You pitch a capital-efficient, four- to six-week proof-of-value pilot.

A successful pilot de-risks your investment by starting small. Using a lean team of just two or three people, you spend the first couple of weeks validating a single, high-impact business problem and a minimally viable architecture. Then, you build and test by connecting just one or two core data sources—purposely ignoring the urge to boil the ocean.

By week six, you aren't asking the board to fund a theoretical “unified customer view”. You are bringing them concrete, measurable evidence of the value you've already validated, giving them the exact ROI metrics they need to confidently answer the question: “Should we scale this?”

Once you understand this focused, six-week approach, your framing has to shift entirely to value. Here is how you take that pilot structure and translate it into an executive readout your CFO can't possibly refuse.

Your Six-Week Fast-Track to ROI

Skip the massive, abstract data implementation. This tip sheet reveals how to start small, connect your most important data first, and show your board concrete evidence of business value in weeks, not months. Download the Pilot Approach Sheet.

Worksheet

salesforce

The 4-6 Week Pilot Approach

The biggest trap in data activation is trying to build a massive, perfect data ecosystem before delivering any value - a process that can take 18 months and millions of dollars. Instead, de-risk your investment by starting small.

This 4-6 week pilot structure is designed to connect just 1-2 core data sources, validate your business case, and provide concrete evidence to your executive team that Data 360 can deliver a fast, capital efficient ROI.

Recommended Structure for a 4-6 Week Pilot:

Phase 1: Validate Use Case & Architecture (Weeks 1-2)

- Confirm the business use case and success criteria.
- Hold your data to determine its actual data use scenarios.
- Design a minimal viable architecture and identify potential blockers.

Phase 2: Build & Test (Weeks 3-4)

- Connect 1-2 core data sources (do not boil the ocean).
- Implement essential data workflows.
- Compare query execution (if needed) to merge duplicate profiles.
- Test the unified profiles using real-world scenarios.

Phase 3: Validate Business Value (Weeks 5-6)

Pilot Investment Requirements:

- Team Size
- Time Commitment
- The pilot project's evidence required

Download now



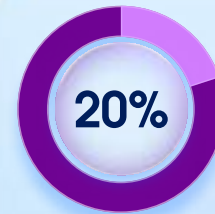
The Philosophy: Stop Selling “Unified Data”

By Mehmet Orun

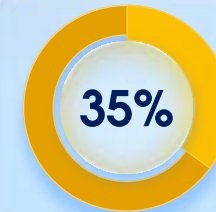
Let me be blunt: Your CFO does not care about your data or technology architecture. If you walk into their office and pitch the abstract value of “unified data” or “Data 360,” they are going to say no.

Every idea in a business must map to one of three goals: increasing revenue, decreasing operational costs, or ensuring compliance. To get budget, you have to prove you have a business need that Data 360 can address without massive upfront risk.

When I pitched our CFO on solving our “Many Sams” data disconnect problem, I pitched a 4-week proof-of-value pilot using a part-time team of three. We proved that we could cut sales rep research time by 20% on average while instantly identifying 35% of our leads as junk. That is quantifiable operating leverage.



rep research time
can be saved



of leads can be
identified as junk



Because Data 360 uses consumption pricing, I could look the CFO in the eye and say, “Here is exactly how many pennies it costs to answer this question, and here is the thousands of dollars in reclaimed sales time it generates.”

Furthermore, I emphasized that having our data remain within Salesforce eliminates the need to maintain external integrations, lowering our total cost of ownership and simplifying our security and compliance operations.



The Playbook: Selling Marketing Efficiency

By Dustin Arnond

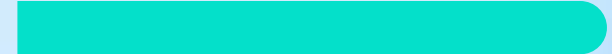
Mehmet is absolutely right. You have to sell the speed and the cost avoidance. The exact same logic applies to marketing use cases.

When securing buy-in from my client Sarah's marketing team, we didn't focus on the technical mechanics of cross-org data sharing. We focused on agility and resource allocation. We proved that by creating 100% unified individuals and giving her team a visual, no-code segment builder, we could eliminate three full days of manual SQL coding entirely.

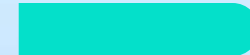
The result we brought to leadership: Campaign launch times went from 3 days to the same day. We pitched a reality where highly paid technical workers weren't acting as list pullers, and marketers could execute on a dime.

Campaign Launch Days

Before: 3 Days



After: 1 Day





The Executive Readout Framework

By Anu Pandey

When you've completed your pilot and you are standing in front of the board, your framing has to shift entirely to value. The board wants to see an achievable roadmap, not a multimillion-dollar tech gamble.

To justify future investments in Data 360 and Agentforce, your presentation must clearly address the four things CFOs care about most:

- 1 Specific ROI accounting for labor costs.
- 2 Time savings per week/month.
- 3 Which high-value business problem was solved.
- 4 How this proof of concept (POC) helped the business better understand its customers.



[Download now](#)

Download the CFO Pitch Template to get the exact slide-by-slide copy you need to present your pilot's before-and-after metrics, ROI breakdowns, and payback periods.



Anticipating the Pushback: The CFO Defense Playbook

By Mehmet Orun

Even with a perfect presentation, a good CFO or CIO is going to test you. I've sat in these meetings countless times. Based on our successful implementations, here is exactly how you handle their toughest objections in their own language.



Can it handle GDPR and CCPA?

My Recommendation: Start by confirming that your current Salesforce infrastructure already meets compliance needs (the answer is almost always yes). Then, provide the definitive response: "Data 360 is built on the [Salesforce Trust Layer](#), meaning you don't have to build compliance from scratch; it's native."



Consumption costs are too unpredictable.

My Response: We are setting budget caps and monitoring our usage weekly using the Digital Wallet. Furthermore, we are controlling costs by using batch processing instead of real-time streaming wherever possible and filtering data before it ever enters the system.



We have Agentforce for Marketing and Agentforce for Service. Why do we also need Data 360?

Let me be blunt: An AI agent without trusted business context is just a fast way to automate bad decisions. Before Data 360, your marketing and service agents only see a fraction of the customer journey, leaving them blind to the true history and meaning behind your data. Data 360 fixes this by harmonizing all your scattered within and even outside of Salesforce. This includes everything from structured numbers to messy PDF files and emails. So instead of forcing AI to guess from disconnected parts, your agents finally have the complete, trusted context they need to take accurate, personalized actions.



We already have a data lake. Why do we need this?

My Recommendation: Data 360 is an activation layer that increases the value of your existing data lake. When questioned, pivot by asking how many business users currently use the data lake (the answer is usually 0). Then, explain that with zero copy integration, you can access your existing data lake and warehouse investments, where they live, and make it instantly useful for sales, service, and marketing teams. This helps you avoid the massive cost and risk of moving or duplicating data.



We're already spending a lot on custom integrations. Is this just another integration tool?

My Recommendation: The strategic approach here is to pivot to time to value and total cost of Ownership (TCO). Start by asking, "What business benefit do you attribute to those custom integrations?" Point out that Data 360 can both take advantage of your data's value faster and improve overall maturity, especially since the value of existing solutions is often not measured.



Confessions of a Datablazer

Why “Unified Data” Will Get You Laughed Out of the CFO’s Office

You can’t sell the abstract idea of “unified data.” Executives only pay for the measurable results it delivers. Find out how to stop selling expensive IT plumbing and secure your budget by pitching increased revenue, productivity, and a low-risk approach.





Top Takeaways

- ✓ **Validate your readiness before you build.** Before starting a pilot, you must be able to answer “yes” to having a clear business use case, aligned stakeholders, and a concrete plan to measure outcomes.
- ✓ **De-risk your investment with a 4-6 week pilot.** Don't commit to a massive, multi-million-dollar transformation right away. Start with just one to three core data sources and a small team to prove real value and calculate actual ROI before deciding to scale.
- ✓ **Pitch the CFO on capital-efficient ROI.** When presenting to the board, skip the tech jargon. Frame your success entirely around quantifiable operating leverage, specific time/labor savings, and how you solved a high-value business problem.
- ✓ **Focus on empowering users, not abstract data concepts.** Executives and internal teams don't just want a theoretical “unified customer view.” They want a system that actually improves their daily workflows, like lead generation or segmentation, so they can increase revenue rather than doing manual data entry.

Related Resources

- [The CIO Decision Checklist](#): Use these strategic questions to ensure you have a clear use case, stakeholder agreement, and the architectural context needed to make the most informed decision about trying Data 360.
- [The CFO Pitch Template](#): This template will help you frame the cost of doing nothing as a measurable financial drain and handle the biggest executive objections so they can't possibly refuse.
- [The Four-to Six Week Pilot Approach Tip Sheet](#): De-risk your investment by starting small. This four-to-six week pilot structure is designed to connect just one to two core data sources, validate your business case, and provide concrete evidence to your executive team that Data 360 can deliver a fast, capital-efficient ROI.
- [Data 360 Implementation Overview Guide](#): See how to bring data together, unify that data into unified profiles, and then act on that data across Salesforce and externally with Data 360. This guide is for all roles involved in the implementation of Data 360.

**Conclusion:
Your Data is Ready.
Are You?**

Conclusion

Your Data is Ready. Are You?

We told you at the start of this playbook that the best data projects begin with a real business problem, not a technology pitch. Now, you have the exact blueprint to put that into action.

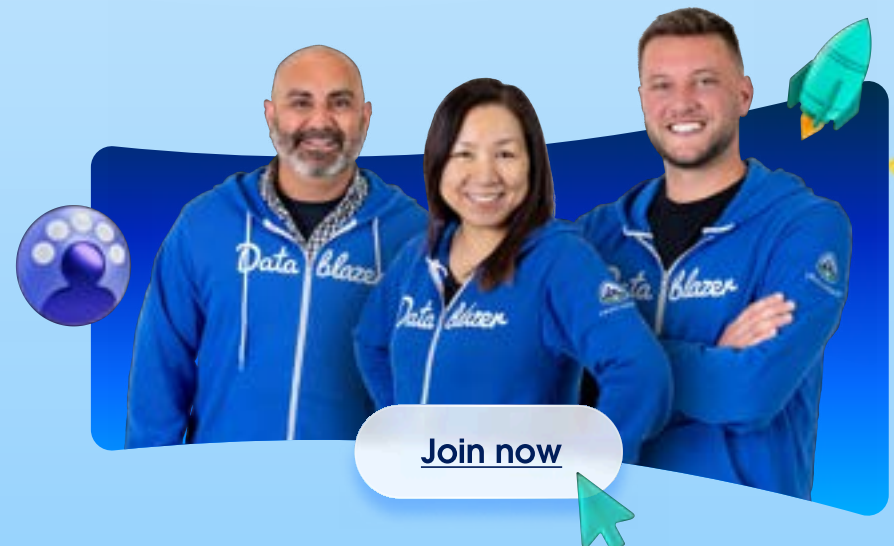
Let's be real: You don't need a flawless database to get started. You don't need to suffer through an 18-month migration. And you definitely don't need to beg your CFO for millions of dollars to build abstract "IT plumbing."

The truth is, you already have the data you need to increase massive ROI right now. You just need to clean exactly what your specific use case requires. Stop boiling the ocean, leave your massive datasets right where they live with Zero Copy, and start turning your existing data into an automated revenue engine.

Don't Go It Alone: Join the Datablazers Transforming your business is an incredible journey, and you don't have to figure it out by yourself. Join the Datablazer Community. We're a massive network of like-minded data visionaries, IT leaders, and developers who are obsessed with maximizing the value of our data.

When you join us, you get free, hands-on training, including our hallmark Datablazer Mastery Onsites (DMOs). These are intensive, day-long workshops where real-world practitioners show you exactly how to tackle complex challenges, design with confidence, and deliver value.

You have the tools. You have the community. Now it is time to build. Join the Datablazer community for free.



Your Next Steps: Activate Data 360 For Free Right Now.

We're giving you the exact tools you need to build your first pilot and prove fast ROI today:

- **Unified Profiles:** No more digging through scattered records. Harmonize customer profiles into a single view to save time, personalize every customer experience, and avoid costly IT rebuilds.
- **250,000 Free Flex Credits:** The fuel you need to power your data tasks and run AI agents.
- **1 TB of Data Storage:** Plenty of space to securely store your most important business records.



How to Activate Your Free Account:

- 1 [Log in](#) to your Salesforce account.
- 2 Go to Setup and select Salesforce Foundations.
- 3 Click “Add to my Contract” and add the Foundations products to your cart.
- 4 Check out for \$0, head back to Setup, and launch your first use case!.



[Activate Now](#)



Need Help Building? Don't Go It Alone.

Implement your first use case and build a data foundation for AI with help from [Salesforce Professional Services](#).

