

The Data 360 Use Case Selection Worksheet

The Framework in Action

Review this completed example to see how a high-impact use case is mapped out before building your own.

Mehmet's "Many Sams" (Sales Use Case):

Our reps wasted 15+ minutes per call manually researching prospects because a single customer ("Sam") existed as many disconnected records. We ran a four-week pilot, used Data 360 and an AppExchange partner to unify these records without manual deduplication, and built an AI agent that instantly surfaced context. We cut research time to seconds and automatically excluded 35% of inbound leads that were obvious junk.



Now let's deconstruct this use case using our four-step framework.

1 Define the Customer Journey

Persona: B2B sales representative making outbound calls to prospects.

Moment of pain: Preparing for customer conversations without complete context. Sam appears as several different unconnected records (trial, webinar, contact form). Critical context is buried in old emails and notes, forcing the rep to open numerous tabs and spend 15-30 minutes researching before dialing.

2 Select a Moment Where Better Outcomes Help

Revenue impact: Lost deals due to incomplete follow-through.

Cost impact: Wasted time researching scattered information.

3 Evaluate Candidates Winner

Use Case Candidate	Probability of Success	Potential Impact	Time to Value
Unified Lead Profiles	HIGH Data existed in Salesforce; 97% email uniqueness meant low complexity	MEDIUM Immediate identification of 35% “junk” leads (named “user user”)	FAST Days to unify identities; 2 hours to set up Moody’s connector
AI Sales Assistant (Internal Agent)	MEDIUM Requires processing unstructured data (emails, notes) via Flow	HIGH 20% research time saved per rep; reduced sales cycle times	MEDIUM 4 weeks to build “proof of value” pilot with team of 3
Traditional Reporting (Status Quo)	LOW Reps won’t manually enter the data needed for reports	LOW Good for management visibility, but does not help reps sell	SLOW Requires constant manual aggregation of 5+ records per lead



Winner: Start with Unified Lead Profiles (quick win), then layer in the AI Sales Assistant.

4 Map the Requirements

Goals and Objectives: Reduce cycle times, improve rep productivity, and automatically identify outstanding action items for prospects.

Capabilities Needed: Identity resolution to connect records without manual deduplication, third-party data enrichment, and an AI agent to read unstructured notes.

Data Requirements:

- **First Party:** CRM lead records (email, company domain), emails, Chatter, PDFs.
- **Third Party:** Firmographic data from Moody’s Analytics (revenue, industry).
- **Signals and Context:** Email engagement, webinar attendance, form fills, existing relationship status.



Your Turn – Build Your Own Use Case

Use this framework to define a high-value moment of pain in your customer journey and evaluate the best use cases to tackle first. Remember: Focus on a specific persona and the measurable impact, and leave the rest of your data ecosystem for future optimization.



1 Define Your Customer Journey and The Moment of Pain

Target Persona: (e.g., B2B outbound sales rep) _____

Specific Action They Need to Take: _____

The Moment of Pain: (e.g., Wasting 15+ minutes researching scattered lead records before every call) _____

2 Define the Business Impact

Revenue Impact: (e.g., Lost deals due to slow follow-through) _____

Cost/Productivity Impact: (e.g., Wasted research time) _____

Compliance/Risk Impact: _____

3 Evaluate 2–3 Candidate Use Cases

Score your ideas based on how quickly they can deliver value.



Use Case Name	Probability of Success (H/M/L)	Potential Impact (\$)	Time to Value (Weeks)	Overall Score (1-10)

4 Map the Data Requirements for Your Winning Use Case

Goals and Objectives: *(What measurable outcome will prove this project was a success?)*

Capabilities Needed: *(What does the system actually need to do? e.g., Unify records, segment audiences, enrich data)*

First Party Data Needed: *(e.g., CRM Lead records)*

Third Party Data Needed:

Signals to Track: *(e.g., Email engagement, form fills)*

Architectural Considerations: *(e.g., Start with 1-3 critical data sources to lower risk)*