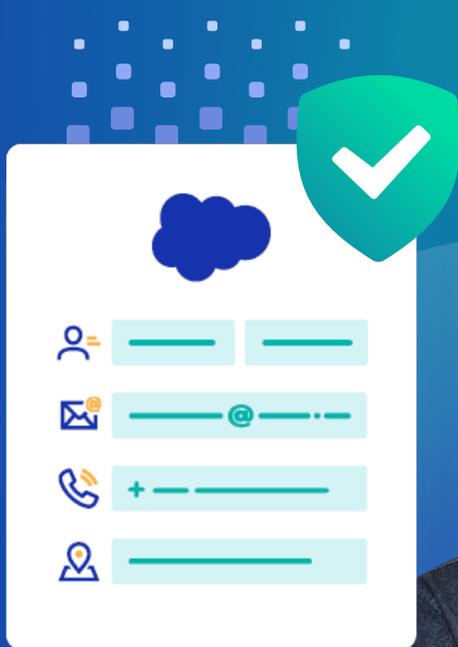


SALESFORCE & DATA QUALITY

How administering Salesforce with better data quality **increases** **user satisfaction**





INTRODUCTION

Do you handle the administration of your company's Salesforce CRM tool? You likely receive many requests from business lines!

Salesforce administrators are often the people CRM users turn to when problems come up. Many malfunctions stem from a lack of data quality or the presence of duplicates in repositories.

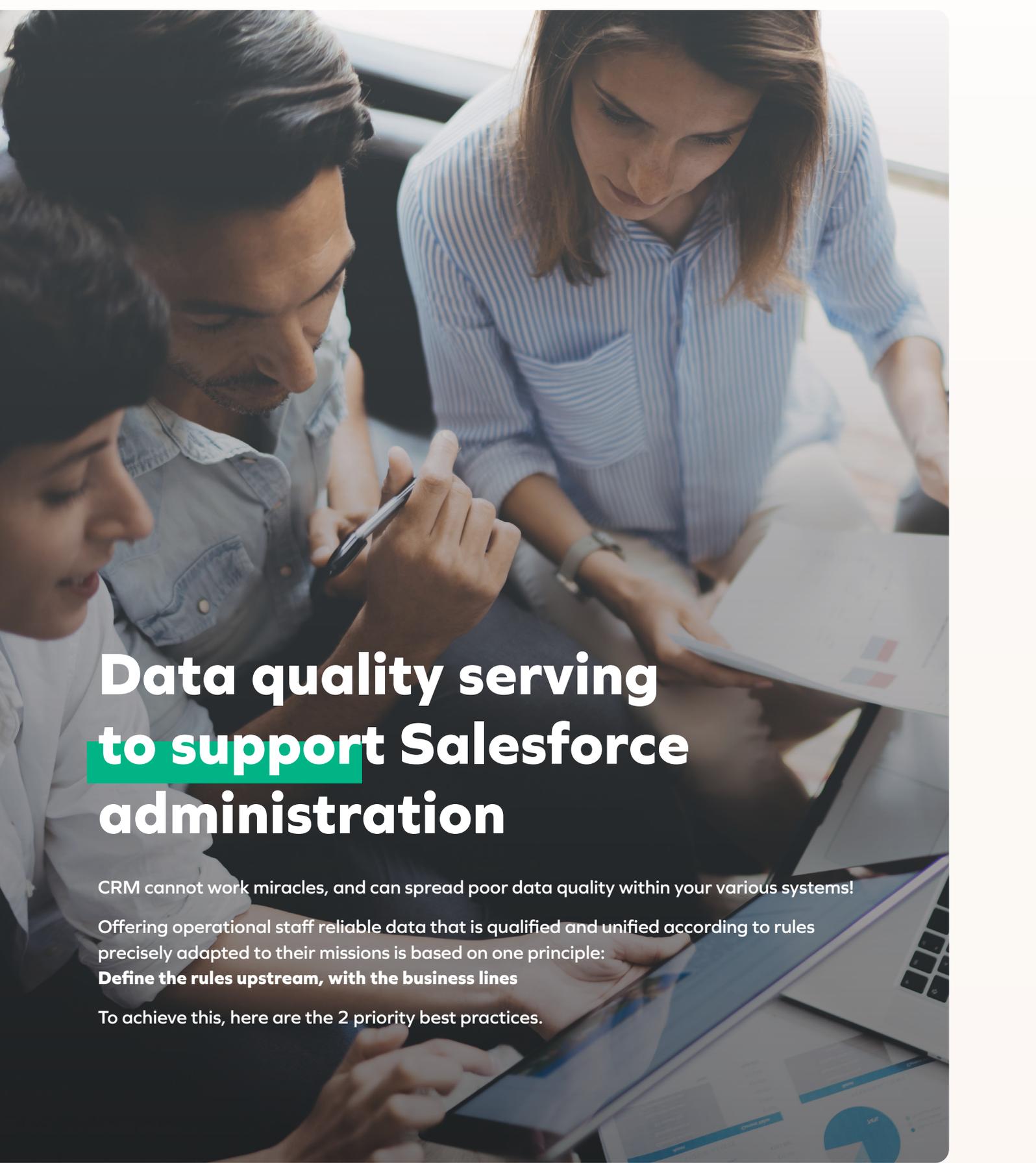
Reports with erroneous data, incorrect postal addresses that compromise successful deliveries, poorly delivered emails, lost customer files (no doubt poorly merged) or that are in multiple copies: if the business lines report these issues to you, then the quality and unification of customer data leaves something to be desired.

However, administering the Salesforce CRM tool does not mean that you are working on the data itself! It is up to the business lines to supply reliable data to the system.

When business lines have neither the skills nor the tools to qualify and unify CRM data, how can we help them make the most of reliable data in the business line processes that drive their work every day?

In this ebook, DQE will give you the best practices in data governance to reconcile the technical administration of a CRM tool with the data quality needs of the business lines.





Data quality serving to support Salesforce administration

CRM cannot work miracles, and can spread poor data quality within your various systems!

Offering operational staff reliable data that is qualified and unified according to rules precisely adapted to their missions is based on one principle:

Define the rules upstream, with the business lines

To achieve this, here are the 2 priority best practices.



BEST PRACTICE N° 1

Include data quality in data governance

In any business, customer contact information is exposed to many process flaws, themselves generating erroneous data. Human errors in data entry, changing phone numbers or addresses, or importing databases that are of poor quality are all examples of problems that can occur with customer repositories. These come from entering bad data!

That is why data governance is the prerequisite for managing data quality and reliability in CRM tools.

What happens when data governance fails to deliver?

In the absence of clear standards and processes, business lines are faced with data inconsistencies. They have difficulty segmenting and personalizing communications, and reports and analyses are distorted, particularly due to the presence of duplicates. When responsibilities and controls of data are unclear, the risk of regulatory non-compliance can be waiting in the wings!

Shortcomings in data governance on the area of data quality are costly!

They can show up as financial losses due to data errors, in degraded team productivity and efficiency, in legal and regulatory risks, as well as in loss of customer confidence, to name some examples.

Define the rules with the business lines

Only data governance rules designed by and for business lines will ensure that Salesforce settings and administration are adapted to everyday use. Data quality is no exception.

The actions to take will concern in particular:

- **data entry and management on the platform** - what standards and what processes are used?
- **responsibilities and controls** – which metadata elements have priority? Which authorizations should be granted for which users?
- **rules for merging** – how is an account defined? A single contact person? What should be merged or kept as-is?





Translate rules into Salesforce administration

Work with the business lines to move from the governance rule to the CRM administration rule.

For example:

Your company connects a marketing automation tool to its Salesforce CRM tool.

You may be using several platforms - Marketing Cloud and Sales Cloud, for example.

Which data source takes priority?

Confirm with the business lines the rules for grouping and synchronizing data in the Salesforce repository, prioritized by source. These fundamental rules of data governance serve as a foundation for data unification that is relevant.

Your customer accounts cover several contacts with shared contact details

How do you avoid over-merging or over-communicating?

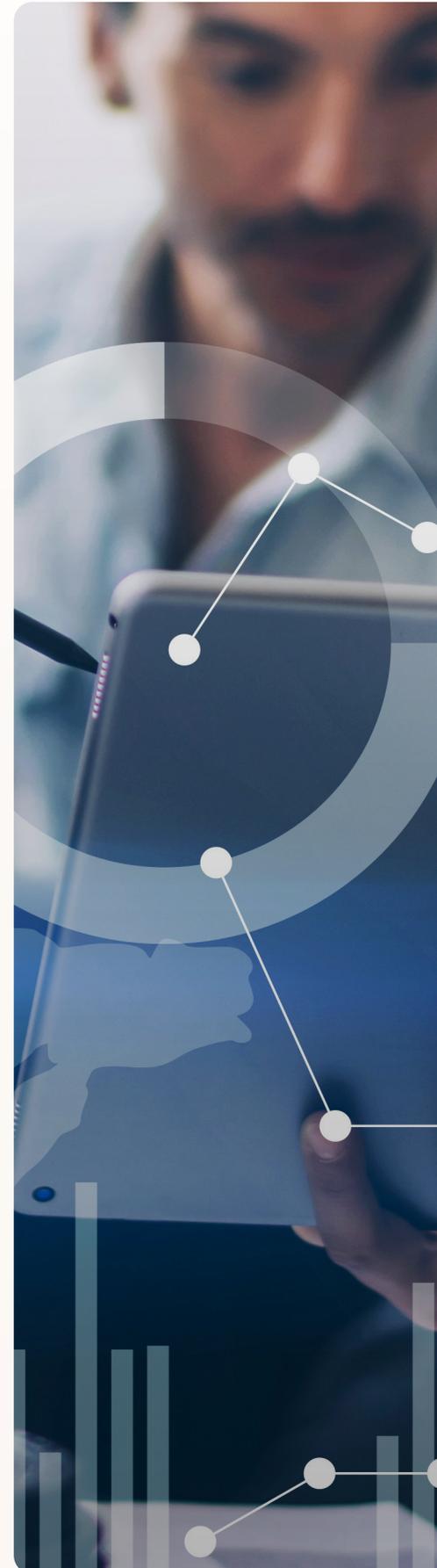
For example:

In medical practices: a generic phone number and email address can be used by several healthcare professionals.

Your business lines will explain to you the expected settings to ensure that you do not consider the records as duplicates that need to be merged, but rather as separate nurses or doctors, and thus retain the records of all the people involved.

With energy suppliers: several members of the same household are attached to the same postal address - and each has their own contact details.

Your business lines will explain the settings required to avoid sending the same promotion or invoice twice to the same address.





BEST PRACTICE N°2

Choosing the right data quality solution

Dealing with data quality and unification is not Salesforce CRM's primary purpose.

Salesforce actually provides the software and technology that can be used to manipulate customer data according to customer relationship business line processes. That is why its data quality functionalities are secondary, and do not cover every situation. Deduplication is an example: Salesforce can identify duplicates only if they are perfectly accurate on a single criterion – usually the customer's name or email address.

Moreover, the CRM tool also lacks the processing power required to unify very large databases of several tens of millions of customers.

You need to "augment" your Salesforce CRM with a state-of-the-art data quality solution!





On the criteria for choosing the right data quality solution, pay particular attention to the following features:



Fine-tuned deduplication/merging

Your data quality solution must be able to identify duplicates according to reconciliation keys adapted to your context and customized for your company. The notion of fuzziness and contextual content is taken into account. The unification of duplicates is also customizable, ensuring that no customer is lost, and that duplicates are kept deliberately when a customer needs to be present in the database via several accounts.



Real-time control

In the CRM tool, activity involving data elements is constant. Even though curative treatments allow you to clean up a database at a given moment, you still have to avoid entering erroneous data into the database in real time, and creating duplicates. This is why the best data quality solution must ensure instantaneous control of data entries and real-time identification of the existence of a customer in the database.



Unlimited processing power

Your data quality solution needs to be able to handle volumes of up to several million data elements. This is a prerequisite if you do not want to overwhelm your processes, especially when it comes to deduplication!



Native CRM integration

Ideally, opt for a solution that offers native integration with Salesforce, with technological compatibility while respecting data security, and that can be accessed from users' usual Salesforce interface. This avoids the need to set up API calls in the various Salesforce forms, which leads to numerous development errors. You also simplify the process of repatriating processed data to the CRM database, and enable your users to address the database directly in Salesforce, without the need for complex data reintegration.



No processing performed in blackbox mode

As a Salesforce administrator or business line user, you need to be able to take control of data qualification and unification rules. The data quality solution must therefore be easy to learn and use, to encourage autonomy in use. This is where the support of a data quality software vendor is crucial!



Respond to business line needs with data quality



Have you already heard about these issues from your business lines? Data quality offers you answers!

A customer calls the after-sales service with a complaint because the product delivered is not the one ordered on the brand's portal. The customer service representative cannot see from the CRM that a previous customer file exists in the web portal information system. They do not have any information about the customer's history, and there is a chance of creating a duplicate record during the call.

TO BE ADDRESSED

Multiple data sources and silo effects

DATA QUALITY'S ANSWER

The unification of qualified and deduplicated data

By qualifying your customer contact data from forms at all collection points and unifying it, you are on a fully operational footing in Salesforce, with verified, existing and contactable data streamlined into a single record per customer in the CRM tool. The 360° view of the customer means you can see their history directly, retrieve contact data without having to re-enter it, and respond immediately and appropriately.

Your in-store or online representatives waste too much time entering customer details, to the detriment of listening to customers and developing customer relationships. In-house users sometimes resort to workaround strategies by entering false contact data in order to validate forms more quickly. The abandonment rate on your online forms is alarming: customers and prospects do not complete forms.

TO BE ADDRESSED

Data entry difficulties

DATA QUALITY'S ANSWER

Real-time control and input help

At every point of data collection, a dynamic control integrated into the forms immediately identifies data entry errors, checks the contactability of email addresses and telephone numbers in real time, standardizes postal addresses according to official postal service standards, and enriches company legal data based on company name or registration number. For Salesforce users, creating a file is just a simple formality.



Your marketing department is experiencing unsatisfactory deliverability rates when distributing communications.

Your e-commerce department has to manage resending numerous undelivered packages. Customers are complaining, and checking with them for the right postal address is tedious.

TO BE ADDRESSED

Erroneous data in the customer repository

DATA QUALITY'S ANSWER

Cleansing customer contact data as part of curative database processing

While data collection must be qualified in real time to avoid entering erroneous data into the database, it is also important to clean up the existing records. Data quality settings can be used to check the validity and reachability of customer contact data (email address, telephone number, postal address) in the customer repository. This enables users to clean up erroneous data such as inactive telephone numbers, emails that have been mistyped or that have become invalid, obsolete postal addresses if the contact has moved.

Sales teams cannot benefit from a clear view of each customer's potential, because the associated sales are divided between several duplicates. Customer service does not count the same number of loyalty points as customers do, because the data is scattered across several contact sheets for the same person. CRM and marketing departments have difficulty segmenting customers because they cannot distinguish a returning buyer from a newcomer because of yet another customer file recently created in their name.

TO BE ADDRESSED

Presence of duplicates in the customer repository

DATA QUALITY'S ANSWER

Dynamic deduplication

Dynamic deduplication functions enable you to locate records that concern the same customer, then reconcile the data they contain according to the master data to be retained, as defined with the business lines. This provides Salesforce users with a single parent record that merges previously validated items from duplicates. Thanks to this reliable and qualified Golden Record, they can take full advantage of customer data.



And in the future?

Anticipate the rise of generative AI!

The next foreseeable problem for CRM data users: distorted results created by generative AI!

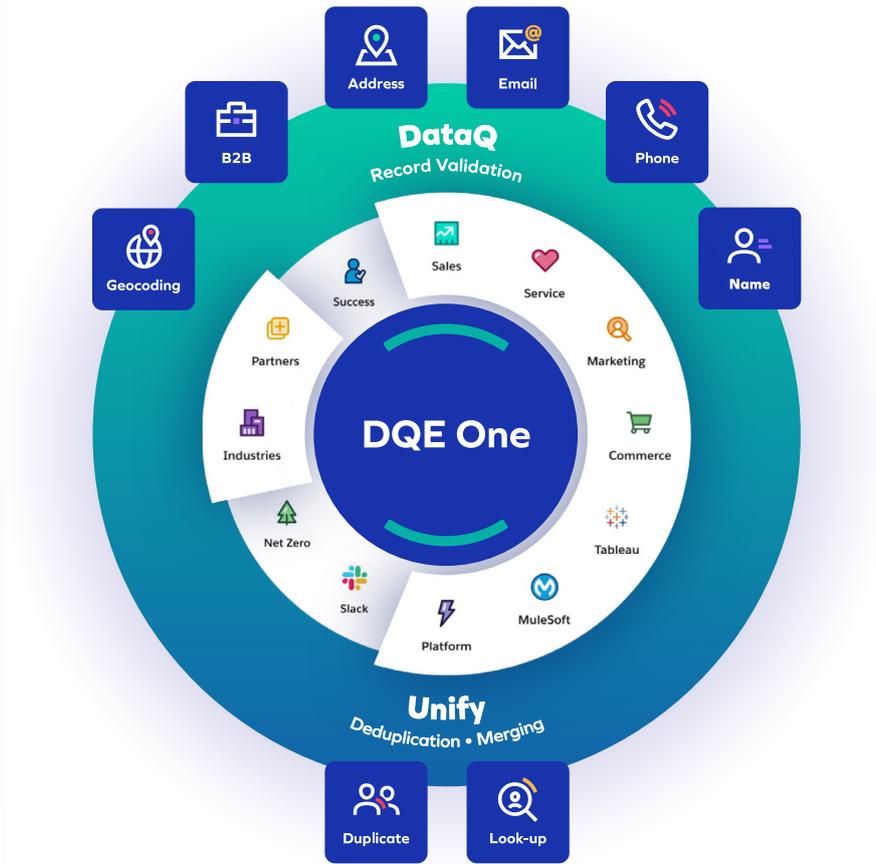
Why is this?

This intelligence that learns uses the data at its disposal to train itself and respond. If the customer data feeding AI is not reliable, the results will not be either.

Data quality makes generative AI answers more reliable. It also directly influences the explicability and interpretability of AI models. Indeed, instilling data quality into a generative AI model improves the ability to provide clear explanations of predictions, understand accurate and actionable information for users, and it boosts confidence in the results provided by AI.

When generative AI uses CRM data, controlling, maintaining and evaluating the quality of this data throughout the AI project lifecycle is essential. Since you administer Salesforce, you are well positioned to make a valuable contribution to AI projects that are increasingly strategic for your business!





About DQE

Founded in France in 2008, DQE Software (DQE) is the vendor of DQE One, a modular data quality management solution.

Our solutions are specialized in BtoC and BtoB customer contact and identity data. DQE One controls the quality of data including last name, first name, e-mail address, telephone number, postal address, and legal data. DQE One includes two product lines: DataQ, a contact data quality solution, and Unify, a deduplication solution.

Across all industries, DQE helps organizations ensure that their customer data is reliable, and accessible to everyone, at all times. DQE One stands out as the most powerful data quality solution on the market, capable of managing databases of several tens of millions of contacts. Each year, our processing represents over 3 billion queries with an average response time of 150 milliseconds.

DQE One relies on powerful engines and algorithms that benefit from over 10 years of experience. The solution interfaces with more than 240 international databases for the postal address portion. Natively, DQE One offers connectors with solutions such as Salesforce, Microsoft/Dynamics, Cegid, Magento, etc. Our algorithms work on all our customers' clouds: Heroku, Azure, AWS, and GCP.

DQE One is used by a wide range of business lines (CRM teams, Chief Data Officers, Chief Digital Officers, CIOs, customer relationship managers) for more than 400 clients. Among them are several listed companies and well-known brands such as Groupama, EDF, BUT and Belambra.

For more information, visit www.dqe.tech/en and follow us on   