A Quest for Data Quality Leads to Validity DemandTools

As a dominant player in providing commercial data and analytics for businesses of all sizes worldwide, our client has an ever-present awareness of data quality and knows that superior data standards are key to an organization's success. The database their clients rely on to gain valuable business insights – a database that receives millions of updates per day – is a well-organized and optimized machine. But they found the management of their internal business data presented them with a different set of needs and challenges, calling for a new set of tools.

Optimizing Internal Business Data

In 2007, their quest to optimize their customer data and its usability began with implementing Salesforce, the industry-leading customer relationship management system. In the early stages of implementation, the client's Salesforce administrator and business analyst recognized the urgent need for a data maintenance and quality process the native tools alone couldn't provide.

> As she explained, "I believe the cleaner the data inside Salesforce, the better the user experience, and the more powerful the understanding of the prospect or customer. With more robust and reliable data, users can trust what they see in Salesforce and make confident business decisions."

At a glance

Company:
Leading global provider of commercial data, analytics, and insights for businesses

Sector:
Commercial and Professional Services

Upon implementing Salesforce, it was clear that the sheer magnitude of data inside the client's CRM and the complexities of managing it created the need for a robust data maintenance and quality process. Enter DemandTools.

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The Salesforce admin was on a mission to find the best data quality toolset on the market. She needed a multifaceted and flexible application that would keep up with the changes in Salesforce and the company's challenging data needs.

> While attending Dreamforce, Salesforce's largest tradeshow and knowledge sharing event, she came across the Validity team's booth and discovered the data quality management tool she was seeking: DemandTools.

"We were impressed from the start," she said. "The booth staff was not only able to easily answer what we viewed as tough questions, but they also gave us new things to consider when thinking strategically about our data processes." Immediately upon her return from Dreamforce, she began lobbying for a DemandTools subscription.

Seeing Double

The initial pain point identified in the client's Salesforce data was Account duplicates. During data migration from their former data repositories into Salesforce, they could see their old, disparate systems each had their own record for a customer, causing duplicates in Salesforce.

> Duplicate data entries rob end users of experiencing the core value of a CRM – a true 360-degree view of each prospect and client – so DemandTools was implemented to resolve them.

Its Single Table Dedupe module successfully merged their Account duplicates, restoring a level of confidence in the CRM data. Not surprisingly, DemandTools was called in shortly thereafter to do the same for their Contact records.

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Achieving Greater Flexibility and Productivity

The capability to customize how DemandTools matched and merged data helped the Salesforce admin see other data elements that needed attention. DemandTools gave her multiple modules to leverage for countless data management exercises.

She employed the MassImpact module for data maintenance and standardization. The MassEffect module became her ETL (extract, transform, load) tool of choice, with its more robust capabilities than the out-of-the-box Salesforce DataLoader. And Find/Report IDs, the data comparison module, empowered her to avoid further duplication from imports by comparing external data to existing Salesforce data.

With DemandTools, the Salesforce admin was building processes that were not one-time use cases, but complex ongoing maintenance routines. By leveraging its complementary automation add-on, JobBuilder, she made her processes even more efficient by scheduling data quality actions to run on her preferred schedule.

"Automation is the natural progression of mastering your data," she said. "You get to the point where you can fully automate your data stabilization and spend time diving into other areas of the data."

Advice From a Data Quality Management Veteran

The Salesforce admin has since used DemandTools and other solutions offered by Validity for 10 years. When asked how long it took for her to see positive results in her data and a return on their investment in DemandTools, she responded enthusiastically, "One week! And since then, we've just continued

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to use it more and more, widening the scale of the solution to even more system admins. A quick demo is all it takes for an admin to want to switch immediately from the native Salesforce tools to DemandTools."

> Her best advice to other admins is don't wait. "Get DemandTools and start cleaning your database now," she said. "Take the online training webinars, use the application for a while, and then go back and take the training again. Believe it or not, more functionality becomes obvious to leverage. The application transforms how you view your data, so you can work with it in a more sophisticated capacity."

Additionally, she credits Validity's free training classes with giving her an understanding of not only the application, but of data best practices, like using pre-defined data options instead of free-form text fields. She has also been impressed by Validity's virtual Community and Certification program saying, "Many users will appreciate and benefit from those offerings."

She also finds that showing off DemandTools to non-users motivates them to take action. "Business stakeholders really appreciate how the data is presented and what the tool can do live within the system, right as you demo it," she said. "This is often helpful in building an ongoing understanding of, and appreciation for, the need for data cleaning initiatives."

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