

# Validity's Data Quality Solutions Help Argyle Manage a Highly Customized Salesforce Database

Argyle Executive Forum manages more than 200 live events each year that offer unparalleled networking opportunities and access to cutting-edge best practices and innovative solutions. The company depends heavily on Salesforce, the industry-leading customer relationship management system, to manage their data. In fact, it is so critical for them to have a reliable and easily-updatable platform for their data management needs, that their mindset is, "If it's not in Salesforce, it didn't happen."

Argyle has been using DemandTools and its multiple modules to manage its Salesforce org since 2006 and couldn't be happier with the results. "I generally recommend to any admin that they use DemandTools," explains Gerry Marletta, Director of Technology Operations at Argyle. "DemandTools is capable of so many things, and is going to protect you in so many ways."

## Managing a Massive Salesforce Database

Gerry started at Argyle with zero Salesforce experience, but quickly "ended up taking the reins on customizing the Salesforce org with a ton of custom objects and fields," he says.

Argyle specializes in connecting its curated membership community of over 2 million business leaders with executive-level conferences and thought leadership opportunities. Members include professionals from Fortune 1000 companies and events focus on topics essential to leaders in finance, marketing, data analytics, IT, security, HR, and more. Each event is its own product, in a sense, and has its own key performance indicators. With Argyle's leadership focused on these KPIs and event metrics, it is critical to capture relevant data and feedback from each event in Salesforce.

## At a glance

### Company

Argyle Executive Forum

### Sector

Marketing Services

### Synopsis

A leader in connecting senior executives with the thought leadership to transform their organizations relies on Validity's solutions to help them transform and manage their highly customized Salesforce database.

### Contact us

1-800-961-8205

UK +44 (0) 118 403 2020

[www.validity.com](http://www.validity.com)

Initially, the company was highly dependent on email marketing as its primary way of securing registration to events. This dependency led to a massive database, which topped out at around four million Salesforce records between leads and contacts alone. Although Argyle improved their strategies for collecting marketing data and reduced their database by almost half, they still found themselves having to do frequent, extensive, and time-consuming record updates because their data is so customized.

## **DemandTools Helps Argyle Redefine Their Approach to Data Management**

Outsourcing, which seemed to be the logical choice initially, was the approach Argyle first undertook to manage the updates to such a large and customized Salesforce database. But what they discovered was hiring a contractor just didn't make sense. As Gerry explains, "It's difficult when you have an org as customized as ours is. You could spend a week explaining how and why things are built the way they are, just to get somebody up-to-speed to understand what they're getting into, to then do one or two small development tasks."

That's when MassImpact, a module within DemandTools, was brought in to do roll-up summaries and make conditional changes to the database. Within the first year of having Salesforce, DemandTools became instrumental in redefining how the company managed their data – including updates, inserts, and data changes.

Since then, Argyle has implemented additional DemandTools modules. They currently use the ETL tool, MassEffect, the most for its data updates. They utilize Find/Report IDs to clean up issues that arise when team members run reports, export them, and then make changes to the data, but haven't included the record ID to translate the changes into Salesforce. The only way to get the IDs into the exported data so the updates can be processed is to use Find/Report IDs. The module allows them to compare a spreadsheet against Salesforce data and, when a match is found, returns any field from the matching record, like the record ID. "Find/Report IDs gets me out of a bind quite a bit," says Gerry.

**DemandTools became instrumental in redefining how the company managed their data – including updates, inserts, and data changes.**

**Argyle has been using DemandTools and its multiple modules to manage its Salesforce org since 2006 and couldn't be happier with the results.**

**"Find/Report IDs gets me out of a bind quite a bit."**



## PeopleImport Simplifies List Imports and Prevents Data Duplication

PeopleImport, one of DemandTools' sister applications, is also used by the company as their go-to tool for list imports. Often, list loads cause duplicates to be created in Salesforce, but with PeopleImport, they can see who on their list is already in their CRM to ensure they import only new records and update existing records in one process. "It's the easiest way to check against leads and contacts all in one fell swoop," says Gerry.

**"[PeopleImport] is the easiest way to check against leads and contacts all in one fell swoop."**

## JobBuilder Automates Data Cleansing Processes

As Argyle continued with their data transformations, they eventually switched from manually making updates through DemandTools to automating their data cleansing needs with JobBuilder – the DemandTools scenario scheduler. Since then, Argyle has been using JobBuilder for almost two years to run several scenarios daily that remove duplicates and perform other data manipulations. They utilize the tool to take care of data problems that flow into Salesforce through the many integrations grandfathered into their business from acquisitions.

JobBuilder allows them to be more proactive in their data quality strategy and helps them deliver reliable data continuously. "If our cleansing criteria changes, it's really easy for us to open JobBuilder and see the rules that were set up, then go tweak or add to them, as necessary," says Gerry.

**JobBuilder allows them to be more proactive in their data quality strategy and helps them deliver reliable data continuously.**

## Data Quality Strategies to Improve Data Management

According to Gerry, one of the main reasons for using DemandTools is the accountability it provides. When something goes wrong with Salesforce data, it's important to identify the issue and resolve it. But it's also important to determine the cause of data quality issues. Gerry says DemandTools helps them retrace their steps and see where something went wrong. They can then use Validity's tools to remedy the issues, but also learn from the experience. This allows them to continually establish data quality processes that prevent the same issues in the future, and improve how they use Salesforce on a daily basis.



Having a sound overall data quality strategy is critical to Argyle's business for consistent data management, as well as implementing business goals and determining how to market and segment their data. They would not be able to do the data classification they need without DemandTools. Gerry says whenever Argyle acquires another business and inherits their database, practices, and vendors, the ability to "bucket" these new contacts based on different qualities is vital to managing and making the most of that new data. DemandTools allows them to look at different values in fields, such as title, revenue, or industry, and then use certain criteria to sort the contacts into several different categories.

### **DemandTools as a Secret Weapon**

DemandTools might be one of the best kept secrets at Argyle, as nobody outside of a handful of people even knows that it's used. But Gerry, who is the company's sole administrator, swears by the CRM data quality toolset. "I'm in it 15, 20, 30 times a day," he says. "In terms of productivity, I'm easily shaving off 80 to 90 percent of the manual work that would need to be done without these tools."

Having used DemandTools for over a decade, Gerry says it's clear they could not operate at their current pace without the toolset. Any other alternatives would just introduce issues and not provide the same level of data manipulation that the company is accustomed to. To Argyle's leadership, DemandTools is synonymous with Salesforce. The company renews both solutions year after year and, according to Gerry, "The cost of DemandTools is just built into the budget – no questions asked. Everybody gets it—it's a no brainer from our perspective."

Gerry has some candid advice for other Salesforce administrators, saying it makes zero sense not to be using DemandTools at this point. "Unless your company is just using Salesforce as a Rolodex and not doing much with it, I don't understand why you wouldn't use DemandTools."

**They would not be able to do the data classification they need without DemandTools.**

**"In terms of productivity, I'm easily shaving off 80 to 90 percent of the manual work that would need to be done without these tools."**

