Trusted CRM Data and Better Work/Life Balance with Validity DemandTools

Leyna Hoffer, CRM Success Manager at Edmentum, has been using Validity DemandTools to manage Salesforce data since 2004. She says she's such a "huge fan" of the CRM data quality toolset that she literally makes having DemandTools a requirement for accepting a position. "I ask them if they have DemandTools. If they say no, I ask them if they would be willing to invest in it because I won't… I *can't* do my job without it."

Thankfully, when she arrived at Edmentum, a leading provider of online learning programs for educators, DemandTools was already in place. Edmentum, which is headquartered in Bloomington, MN, has been successfully using DemandTools since 2012. With three Salesforce administrators and approximately 400 Salesforce users—as well as about 3.25 million accounts and 1.5 million contacts in its Salesforce database—Edmentum is a B2B company with complex data quality needs.

The Immediate Impact of DemandTools

One of the first data challenges DemandTools was able to solve for Edmentum was streamlining such a large database. "When I arrived at Edmentum," Hoffer said, "We had over 3 million contacts in our database and many of them were duplicates. We were able to use DemandTools to cull that down to 1.5 million contacts."

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At a glance

Company:
Edmentum

Sector:
Education

A leading provider of online learning programs for educators leverages Validity DemandTools to school the competition in data integrity.

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Since then, they've been able to scale the use of DemandTools to meet new data-related challenges and to address CRM data quality needs across the organization.

As would be expected, the sales, service, support, and marketing departments at Edmentum rely on the Salesforce database daily. But even the finance department and product teams leverage it. So one of the most important roles for Edmentum's Salesforce admins, beyond ensuring the data is accurate, is ensuring the data is useful for multiple departments.

Keeping Related Data Records Connected

One recent example of making sure data fits a specific need is from 2018, when the company rolled out new functionality that would allow their executive leadership team to use Salesforce for partner and vendor management. DemandTools played a key role in helping Edmentum's admins prepare the database for this use.

> Hoffer said, "Vendor management was a process we were previously doing in SharePoint. When we brought that data into Salesforce, we created custom objects – a vendor object and a vendor contracts object. We used the MassEffect module in DemandTools to effectively import all the vendor data. Then, to associate the contracts that we were going to upload, we needed to know the vendor ID, so we used Find/Report IDs to make sure that we were attaching the vendor contracts to the correct vendor records."

The objective was to ensure that the correct contract remained associated with the correct vendor. Getting that wrong could have led to poor vendor relations and mistrust in the data. And relying on spreadsheet functionality like VLOOKUP could have been misleading, resulting in errors. It's a task Hoffer said she

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couldn't imagine having to complete without DemandTools, which streamlined the process and maintained data integrity.

Support for a Multitude of Data Quality Needs

Other ways Edmentum leverages DemandTools and its multiple modules? "We use MassEffect for updates and imports, for both standard and custom objects," Hoffer said. "We use MassImpact for standardization – if we want to make sure that all of our state codes are in two-digit format, for example. And we use MassImpact when we have changes that are easier done through writing a formula vs. doing data manipulation in a spreadsheet, where it's a global replace."

The benefit of not having to export data to make a change to the data, and then process an update is not only the time saved, but also peace of mind that the data wasn't corrupted in a spreadsheet. MassImpact also provides a verification grid for pre-processing confidence and a restore file if a mistake is made or a change needs to be reversed.

> Hoffer said they also frequently use the Find/Report IDs module. "We use Find/Report IDs when we're trying to import new data into Salesforce to make sure that we're not creating duplicates. And twice a year, we use DemandTools for its duplicate merge functionality, especially on our contacts. We'll go through and run scenarios to merge duplicate contacts."

DemandTools is #1 for a Reason

Although Edmentum has access to Validity Impact, a suite of data integrity solutions that includes DemandTools, Hoffer's primary focus is on leveraging the go-to product she's trusted for years. "The DemandTools portion is just so valuable to us,

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that we get our money's worth just by using that part of it," she said. Some of the many things Hoffer appreciates about DemandTools include:

• It's powerful enough to handle Edmentum's data quality needs, but it's "very user friendly" at the same time. This makes it easy for users to leverage the functions that are important to them. It also allows the admins to feel comfortable with the processes DemandTools can handle. "There are certainly members of our team that do more of it than others just because of the nature of their jobs, but we all know how to do it and all could do it."

• Online training classes made it easy to learn the software, and she and others in her company will occasionally revisit the training classes "if there is something we haven't done for a while and need to brush up on our skills."

• The return on investment is recognized in how quickly the tool positively impacts data.

• The customer support she has received from Validity is simply "awesome," Hoffer said. "Seriously, every time I've ever had an issue or question, they've been quick to respond."

But one of the biggest reasons Hoffer uses DemandTools is the way it has contributed to her job satisfaction and given her greater work/life balance.

DemandTools Streamlines the Workload of Salesforce Admins

Hoffer first learned how much time DemandTools could save her a few years prior to arriving at Edmentum. "At one of my previous jobs," she said, "I had to combine two separate instances of Salesforce, and I don't know how I could have done that without DemandTools. It would have been a data nightmare."

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Instead, she said, the benefits of being able to leverage DemandTools and modules like Find/Report IDs to "make sure I wasn't importing duplicate data was just immeasurable. Prior to DemandTools, I had no other way to do this other than manually." And as Salesforce administrators can attest, manually combining instances makes the data vulnerable to inaccuracies and, at a minimum, will easily take double the time to prep and process.

As someone who knows achieving true data integrity is a demanding process, Hoffer appreciates the flexibility and convenience of DemandTools. "You can update thousands of records at the same time versus one by one," she said. "It just saves so much time. I mean, days' worth of work are wiped off my plate using DemandTools."

In fact, she's very frank about how much the time savings DemandTools affords her has helped restore her work/life balance. "It enabled me to go home. At a previous job, there were so many times where I'd be staying until 10 o'clock at night trying to work on data and make sure that I had everything deduped and modified the way it was supposed to be. But when I got DemandTools, I literally was able to complete my job and go home when everybody else went home."

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