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DemandTools

Experienced Salesforce Administrators Insist on DemandTools

Having accumulated many years under her belt working within Salesforce, the industry-leading customer relationship management (CRM) system, Karen Hayum is an experienced Salesforce administrator. During her career, she's seen both sophisticated and unsophisticated approaches to managing customer data, worked for companies with as few as 12 Salesforce users to as many as 3,500 users, and — with the exception of some of the larger companies — been the sole Salesforce administrator.

Discovering DemandTools

Karen's journey to discovering DemandTools, the leading Salesforce data quality toolkit from Validity, is something many Salesforce administrators can relate to. Before learning about DemandTools at a Dreamforce event in 2007, Karen used Excel Connector and Data Loader to facilitate data deployments to Salesforce. At the time, she worked for a large child care and early education company, where she had been brought in to fix issues caused by a poor implementation of Salesforce.

Like many companies, Karen's employer was of the mindset that using something standard like Excel was easier and more efficient. But the company found itself having to employ additional resources just to do a lot of manual tasks. What they didn't understand was that all those manual touchpoints posed a considerable risk of corrupting data and breaking record relationships. The results were far from ideal.

Some updates were handled by going into Salesforce, clicking on a field and updating it, then clicking on another field and updating it — a tedious process they'd have to do over and over for what could be hundreds of fields and records. Others would export a report and use Data Loader,

At a glance

Synopsis:

An experienced Salesforce administrator uses DemandTools to help companies achieve cleaner data and improve lead management.

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but because they were not administrator trained, they would often make mistakes or forget to export important fields. Someone would waste an entire day updating data in a spreadsheet, only to find that they were missing the record ID. And, if the person was not that savvy in Excel, they could corrupt all the data simply by not sorting correctly.

DemandTools: Like Having a Full-Time Assistant

Having seen firsthand the various issues that could arise when manipulating data without sophisticated tools, Karen was elated when she learned about DemandTools and saw it in action at Dreamforce. She said getting her company on board with the solution was the easiest sell she ever had to make. And it quickly proved its value.

With DemandTools now at her disposal, Karen was immediately able to fix an issue that occurred when someone went through a list, manipulated it, and accidentally broke the reference to the record ID along the way. Using the Find/Report IDs module in DemandTools, Karen was able to compare the spreadsheet against her records in Salesforce and, by matching on the email address field, pull back the correct record ID and add it to the spreadsheet to restore accurate record ID relationships. "That was the first time I thought, 'Wow! Look what this can do!' It was like I suddenly had a full-time assistant," she said.

The Benefits of a CRM Data Quality Toolset

Initially, Karen used DemandTools primarily for updating lists and batch cleaning. She said the most common requests would come in as, "Here's a list that has been exported from Salesforce and we want it changed," which could be facilitated easily using DemandTools to export and then push the updates using the MassEffect and MassImport modules. This is how Karen got her "sea legs" with the toolset. Her training on the DemandTools modules was mostly through the tutorial videos, Help documentation, and Glossary, as well as lots of hands-on practice. She found DemandTools "extremely logical."

As time went on, Karen used DemandTools for other activities, such as executing scheduled backups on Salesforce data, utilizing the Reassign Ownership module for realigning sales territories when ownership changes were needed, and running Single Table Dedupe to clean up

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duplicate data. She also leveraged some of the different administrative options in the tool to map user data like log files, restore files, scenarios, and master rules into a shared drive to ensure appropriate access when needed.

And although Karen usually turns to DemandTools first when it comes to reporting, if she does use or is given data from Salesforce reporting, she'll often use DemandTools as her backup, checking to confirm the results are accurate.

Encountering Unique Challenges with Salesforce Data

At her various assignments over the years, Karen often encountered interesting problems for which DemandTools proved to be integral in resolving. When working for a large commercial credit and reporting company, Karen was tasked with cleaning up approximately forty million records. The huge volume was mostly due to system-generated records. There was a need to delete old records that were bloating the database, but approval was required from legal before permanently removing any records. To determine which records were acceptable to eliminate, certain criteria needed to be checked, such as whether the record owner was active or not, and when the record was created. Unfortunately, it was not possible to report on that particular information in Salesforce, but MassEffect's export feature enabled Karen, through table joins, to only export records with inactive owners that were created within a specific date range — and then, also with MassEffect, delete them.

Salesforce's archive feature also created an interesting matter to work around. If a task has been closed for a year, it is marked as "archived" after the 365th day. Some of the archived information was visible on the record detail view, but due to the number of records, it was impossible to run a report on that data because it would always time out. The only way archived tasks could be manipulated and cleaned up was through DemandTools. The data would be exported from Salesforce via a report, manipulated in a spreadsheet, then updated back into Salesforce using MassEffect.

Using Placeholders to Manage and Clean Up Bad Data

Another way DemandTools proved to be invaluable was in the use of

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"placeholders." During one particular assignment, Karen was able to create placeholders to identify all of the bad email addresses, phone numbers, cities, and abbreviations that were considered invalid data. This approach helped immensely when the company was trying to match on certain items for scoring and other uses. By standardizing the "junk" data, it could be excluded from what was being matched on and make the match results that much cleaner.

To facilitate this, Karen set up a Windows Task Scheduler job that ran periodically, found all the garbage data by looking for the placeholders, and then sent it through MassEffect to update the ownership to "dead queue" or an arbitrary administrator owner and check the records off "to be deleted." In order to clean up fields like country and state or province abbreviations, Karen automated a logic flow for what was run first and how, which minimized the number of pushes and updates. For example, she could run a cleanup on the state field and populate the country at the same time, then fix the phone number.

Managing Lead Conversions and Moving Tasks

In her current position working for a cybersecurity firm, Karen completed one of her first Salesforce cleanup assignments using DemandTools. In this case, an existing lead conversion job was running, but it wasn't properly moving related activities to the newly created contact record. The leads were getting converted, but the tasks were staying open under the lead record. By using two simple steps in DemandTools, Karen was able to identify and export the tasks that needed to be moved from the converted lead to the new contact record, process the update, and move the tasks from an open to a closed state. In her very first delivery for the company, DemandTools allowed Karen to quickly and easily process multiple updates to 300,000 records, warranting an enthusiastic "Nice job!" from her boss.

It's the kind of experience she's had several times since switching from less sophisticated solutions to DemandTools over a decade ago. And after discovering how powerful the CRM data quality toolset is, she won't work for a company unless they have it. For Karen, "DemandTools has been a huge lifesaver." It has enabled her to focus more on heavy-lifting type work and jump ahead in her career. And because DemandTools is now considered an asset among many employers, Karen's comprehensive

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knowledge of the tool has led companies to seek her out for jobs. Over the years, Karen has also become a fan of Validity's solution PeopleImport, using it frequently to import lists after trade shows to ensure duplicate records don't enter the Salesforce database.

Seeing the Results of Data Quality Across Teams

DemandTools has also made it easier to demonstrate that the work a Salesforce administrator does is valuable across the organization.

Most organizations don't have a clear picture for how their data quality impacts business functions like sales and marketing. But, being a savvy data-minded person, Karen knew her work was valuable across all functional areas of the organization. The marketing and sales teams that Karen worked with saw better results on their campaigns because there were fewer duplicates in the system. Most of the time they did not have visibility to DemandTools, but what they experienced once the tool was in place was cleaner, more complete data, that was delivered faster.

For the occasions when Karen needed to share details of the records she was working on in PeopleImport or DemandTools with marketing or other teams and end users, the export files from PeopleImport and Single Table Dedupe were invaluable. In her words, "What you guys have done to deliver an export file that I can pass along, and that's easy and logical to read – It's wonderful."

The breakdown of the duplicate key was of particular use. It allowed Karen to pass information quickly to somebody and say, "Here. This is what I did. This is a universe of records I got back, and they're matching because of this. And here's what I think is the winner. Do you agree?" By starting with extra rigid criteria, she was able to quickly and easily weed out the blatant duplicates immediately, and following best practices, would then go in and loosen up her match criteria to include duplicate sets that were less exact, but still needed to be resolved.

The Payoff and Bottom Line

The most prevalent return on investment that Karen has seen in her experience is the freeing up of actual resources. Not having to pay a $30,000, $40,000 or even $50,000 a year salary for one or more people

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to update records or do various other Salesforce manual jobs is a big savings to any company.

Data Loader is another option, of course, and it is free, but according to Karen, "DemandTools is like Data Loader on steroids. Data Loader is really just a two-door car, and you've got to move this weekend. Well, guess what, I've got a U-Haul truck here, and this is what I'm going to be able to do for you." Data Loader also tends to be harder to use if someone is less technically inclined.

The bottom line for Karen is that insisting on DemandTools is a no brainer. "Whether it's a company of five users just starting with limited resources, or it's a big established company, I can do so much more with DemandTools. It is my toolbelt. Given the comprehensive toolset provided by DemandTools, it's as easy as, 'do I need a wrench, a hammer or a drill?'"