

# 4 WORKFLOWS YOU SHOULD AUTOMATE IN SALESFORCE

As a CRM user, you have a love-hate relationship with your database. Sure, it's helpful, but let's face it—many customer data management tasks are repetitive, time-consuming, and just plain boring. Especially as more data enters the CRM and it becomes more difficult to maintain.

The answer? CRM automation. CRM automation lets users leave tedious, time-consuming tasks in the past without sacrificing the quality of their data.

Keep reading for everything you need to know about CRM automation and the key workflows you should be automating yesterday.

## Why automate CRM work-flows?

Unfortunately, you can't just snap your fingers and have your workflows automated—this takes time and effort to set up. But here are a few reasons why the juice is worth the squeeze:

### Increased productivity and efficiency →

The best part of automation is the freedom it provides. CRM automation allows users to streamline tasks, which frees up the rest of their day to focus on what matters. For sales and marketing teams, this could mean the freedom to send more emails or reach out to more customers on the phone, which ultimately means more revenue.

### Better customer experiences →

An automated CRM doesn't just benefit users—customers will feel the love, too! When everything in the CRM needs to be done manually, it doesn't take long before tasks start getting left on the back burner. The problem? This results in poor data maintenance, which can cause major friction with customers.

Let's say someone on the sales team decides to contact a lead. When they make the call, it turns out that person was already contacted by someone at your company! Automating the deduplication process (more on this later) can address all the duplicate records the sales team doesn't have time to fix, reducing their stress levels and keeping customer relationships intact.



## Improved data accuracy and organization →

There are *many* mistakes that can be made when entering data manually, like spelling someone's name wrong, forgetting the "@" symbol in a person's email address, skipping over a field completely...the list goes on.

CRM data automation can reduce the number of manual entry processes, shrink the likelihood of error, and improve overall data accuracy.

But it's not just data *entry* that can be automated. Record updates can be automated, too. This is good to keep in mind—with so much new data entering the CRM, it can be easy to forget to go back and update old contact information.

## Better decision making →

As mentioned previously, CRM data automation can play a major role in improving data accuracy.

Let's say the Head of Sales forecasts \$60M in sales for the year. This number is lower than he'd hoped, which means the business will need to shrink budgets, team sizes, and more to hit the revenue target. It's not long before employees are laid off, the marketing team stops sponsoring industry events, and the company moves its remaining employees to a smaller, less efficient workspace to cut costs.

Then, the Head of Sales realizes he significantly under-forecasted. The data he used to create the forecast was riddled with errors, resulting in a forecast that was \$50M less than it should have been. Long story short, CRM automation could have prevented the human-made errors that led to such a catastrophe.

## Four CRM work-flows you should automate

Okay, we've covered the *why* behind CRM automation. Now let's get to the *what*. Here are the workflows you should automate in Salesforce.

### ① Contact Verification

Customer-facing teams rely on email addresses and phone numbers—and can't get very far with invalid or outdated information. Rather than manually searching your records for missing figures or errors, set up automation to capture invalid records before they enter your database.



## #1: Contact Verification (cont.)

### KEY STEPS

#### **Determine the validation process:**

Define the triggers or events that will initiate the email validation process. You may want to validate email addresses during the data entry process or before sending out major campaigns.

#### **Implement validation logic:**

Use the functionality provided by the email validation service to implement the necessary logic in your CRM. This typically involves making API calls or using the service's SDK (Software Development Kit) to validate email addresses in real time.

#### **Devise a plan for validation results:**

Once you receive validation results, decide how they should be handled. This might involve updating the contact record with the validation status (valid, invalid, incomplete, etc.) or taking appropriate actions based on the validation outcome, such as suppressing invalid email addresses or displaying error messages to users.

#### **Continuously validate and update:**

Implement a process to periodically validate and update contact information in your CRM—at minimum, a few times per year. This ensures your contact data remains accurate and up to date over time. You can schedule batch validations or perform validations during regular data maintenance processes.

## **(2) Approvals**

The approvals process can seriously slow down sales teams. While it's always important to get signoff from the right stakeholders, there are ways to make the process less onerous with automation—particularly for approvals that require a fast turnaround. Try using Salesforce Approval processes that take automation one step further, and let you specify a sequence of steps that are required to approve a record.

### KEY STEPS

- Determine the criteria and conditions that need to be met for an approval to be triggered. This includes specifying the relevant objects, fields, and values that will be evaluated during the approval process. For example, a record may be sent for approval only if it contains a discount greater than 30 percent
- Lock the record so it can't be modified until the approval is complete.
- Configure email notifications to keep the relevant stakeholders informed about the approval process.
- Determine the actions that need to be taken when an approval is submitted, approved, or rejected. This might include updating fields, sending notifications, triggering workflow rules, etc.



### ③ Record Creation

Salesforce Flows let users build sophisticated business automation in just a few clicks—no coding necessary. AKA, it's your new best friend.

One way to use this declarative, no-code functionality is to automate the record creation process. For example, when an opportunity is marked as closed-won, Flows can be used to automatically create a task for the advocacy team to reach out in three months for a customer testimonial and a customer advocacy record, with a status of “pending.”

Automating processes like this ensure the CRM is used and relied upon, which increases efficiency and accuracy across organizations.

To get started in Salesforce Setup, navigate to the Flows section and create a new Flow. Give it a meaningful name and select the type of flow you want to create (e.g., Screen Flow or Auto-launched Flow).

### ④ Deduplication

The big Kahuna. Dupes are inevitable—and trying to find and match them manually is a recipe for disaster.

Automating deduplication processes makes them more effective, which in turn saves you money on storage costs, improves your customer outreach, and helps your org stay on the right side of the law (did you know dupes can violate data protection regulations and create privacy risk?)

#### To automate deduplication in Salesforce, follow these steps:

- Enable and configure Duplicate Management in Salesforce to automatically identify and prevent the creation of duplicate records.
- Define Duplicate Rules to specify the criteria for identifying duplicates based on specific fields and matching algorithms.
- Set up Matching Rules to determine the level of similarity required for records to be flagged as potential duplicates.
- Define Matching Rule Sets to group related Matching Rules together.
- Activate the Duplicate Rules and set the desired actions, such as blocking the creation of duplicates or generating alerts for users to review and resolve potential duplicates.

Remember to use caution and perform backups before conducting any deduplication activities to prevent accidental data loss.

While Salesforce has out-of-the-box functionality to assist with deduplication, users will find more advanced capabilities like auto-merging and auto-converting in a solution like Validity [DemandTools](#), which specializes in deduplication and data cleansing.



## Take Your Automation to Full Power

Looking for a more powerful way to automate key Salesforce workflows? [Validity DemandTools](#) complements Salesforce automation capabilities by providing advanced data management functionalities that can be integrated into your overall automation workflows. By automating data cleansing, deduplication, mass updates, and import/export processes, DemandTools helps maintain data quality, integrity, and consistency, contributing to more efficient and effective automation in Salesforce.

To learn more, schedule some time with our team of data management experts.

**Schedule a demo**