# The Salesforce User's Benchmark Report

A detailed look at trends and patterns among Salesforce users, and how organizations leverage the CRM to stay ahead of the competition.

# Introduction

To find out where Salesforce users are succeeding and where they're lagging behind, we surveyed 897 Salesforce users across the globe about their current goals and challenges, tactics, and what they expect from the future.
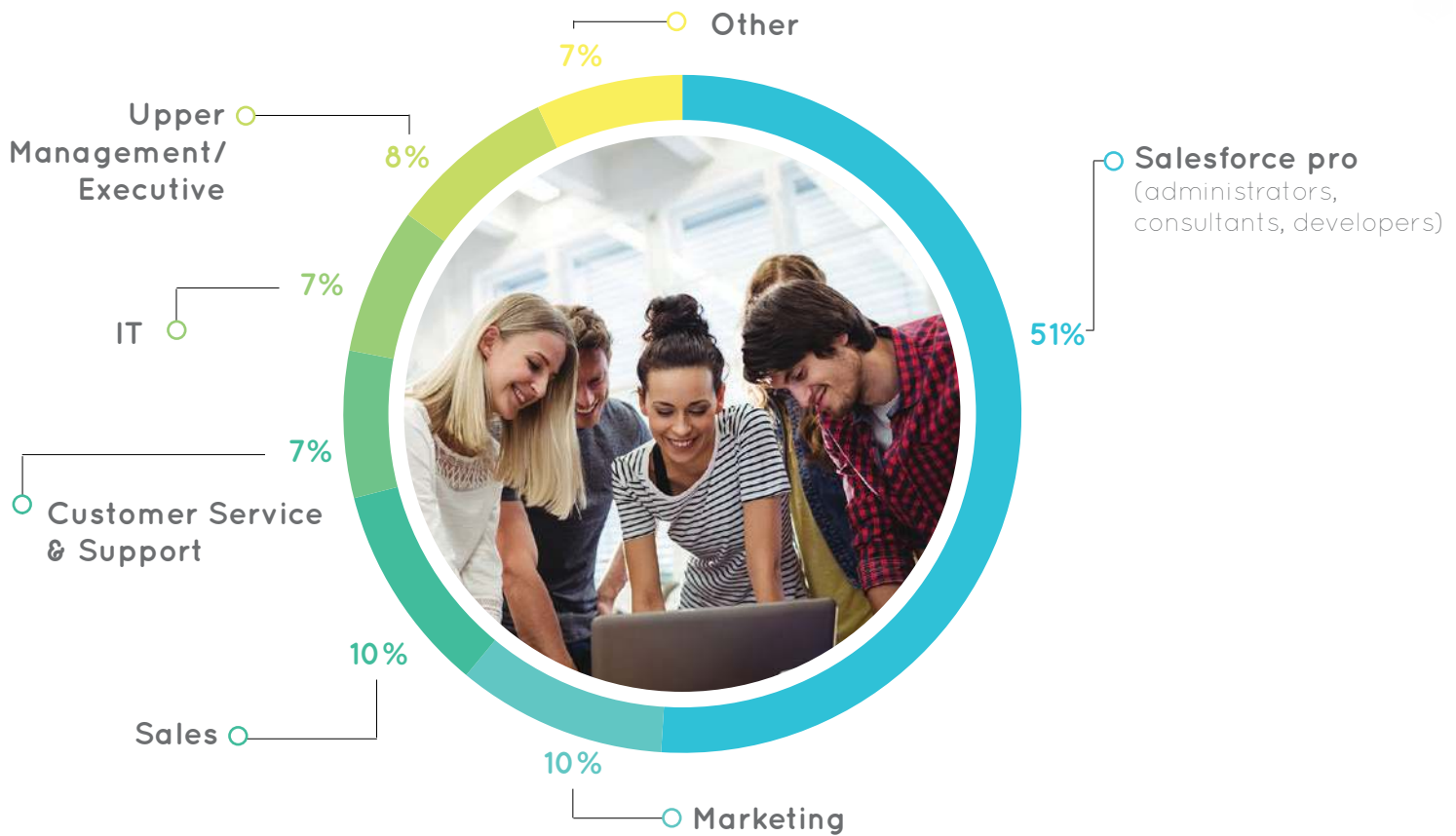
In this report we'll cover:

> • **Goals and challenges:** What are Salesforce users struggling with? What are they hoping to achieve with their orgs over the next year?

> • **Tactics and priorities:** What tactics are Salesforce users using to meet their goals, and which do they see as most important to their business?

> • **Trends and opportunities:** How can Salesforce users leverage Salesforce tactics and tools to stay ahead of the competition?

# Summary of Data

**Methodology**

In April 2017, Symphonic Source surveyed a group of **897 Salesforce users** from across the globe via an online questionnaire. Respondents were not necessarily customers of Symphonic Source.

While a series of questions was presented to all respondents, other questions were presented to sub-segments of these Salesforce users based on self-identified roles. These roles included:

Other
7%

Upper Management/ Executive
8%

IT
7%

Customer Service & Support
7%

Sales
10%

Marketing
10%

Salesforce pro
(administrators, consultants, developers)
51%

# Key Findings

- **As a CRM platform, users are relatively satisfied with their Salesforce environment, except when it comes to quality of the data.** 
  Almost half (43 percent) report that they are not pleased or have a neutral level of satisfaction with their data quality.

- **Salesforce is not the single source of truth, despite efforts to make it that way.** 
  About a third (29 percent) of all respondents agree that Salesforce should serve as the primary data warehouse, but users don't consistently enter data. Instead users store data outside of Salesforce, in, for example, spreadsheets and email clients.

- **According to the average Salesforce user, most data is not useful or reliable.** 
  Over half (58 percent) of respondents believe that up to 80 percent of their data is not useful or reliable, implying that less than a quarter of data is actionable and trustworthy.

- **Businesses today need more substance to their data rather than a larger quantity.** 
  Given the choice between increasing the volume, variety, or velocity of data, 41 percent of those in an upper management or executive roles say the greatest benefit to their business today would be increasing the variety, or types, of data.

- **The biggest burden to a Salesforce environment is poor data quality.** 
  Duplicate records, errors, and outdated information rank as the top reasons why users struggle with building a trustworthy and fully functional Salesforce org.

- **Salesforce users expect their data to grow by a half over the next year.** 🐦
  Sixty-six percent of respondents believe their data will grow by 50 percent or more over the next twelve months.

- **Despite an optimistic vision of data growth, most Salesforce users are not prepared for an influx of new/additional data.** 🐦
  Almost half (46 percent) of respondents do not have processes in place to prevent new data from creating problems, such as ensuring data quality, workflows, and triggers.

- **An absence of relevant data and the presence of dirty data are the biggest blind spots to obtaining a complete customer view.** 🐦
  The majority of the blame for not having a 360 degree view of prospects and customers comes down to two key factors according to marketing and sales professionals: poor data quality (26 percent); and lack of a dataset that provides key insights (24 percent).

- **The ability to make better decisions and to elicit accurate reporting is the biggest driver for data quality initiatives.** 🐦
  Upper management and executives (43 percent) feel the main reason for high quality Salesforce data is to allow for better decision making and reporting as compared to any other motivator.

- **Enriching data will take a backseat to cleaning data.** 🐦
  Survey results suggest that before data is enriched or augmented with supplemental information, users should first clean up data that's already present. Over the next year, the biggest priority for a majority of Salesforce users (85 percent) will be to start improving or continue to improve the quality of their dataset by deduping, organizing, and consolidating records.

# Trends and Opportunities

Is Salesforce used as a primary data warehouse? Are users equipped with metrics to make actionable decisions?

# 41%
## Store data solely in Salesforce

## Is Salesforce the single source of truth?

Imagine the picture-perfect scenario where all departments and employees across an organization rely upon one shared platform as the sole, trusted place to derive business insights; a place where all data lives; the source of the "golden record." With a single system of record there'd be no dispute or questioning which metrics are more accurate.

Are organizations using Salesforce as their primary data warehouse? It depends on who you ask.

**Overall 41 percent of respondents say it is, but results vary across departments.**[F1] Forty-four percent of Salesforce admins

and consultants say their organization uses Salesforce as the single source of truth, but 80 percent of IT professionals say differently. Over half (65 percent) of those in an IT role say Salesforce is not the primary data warehouse, but is instead a supplemental system to other integrations and platforms.

**About a third (29 percent) of all respondents agree that Salesforce should serve as the primary data warehouse, but users don't consistently enter data.** Instead users store data outside of Salesforce in spreadsheets and email clients, among other places.

Fig. 1

**Which statement most accurately describes your organization's use of Salesforce?***

Salesforce is the only system we use to house our data. It's our single source of truth.

Salesforce should be our primary data warehouse, but users don't consistently enter data. Instead users store data outside of Salesforce, like in spreadsheets and email clients.

Salesforce is not our primary data warehouse, but it is a supplemental system to other integrations and platforms.

- 41%
- 44%
- 20%
- 35%

- 29%
- 30%
- 15%
- 40%

- 30%
- 26%
- 65%
- 25%
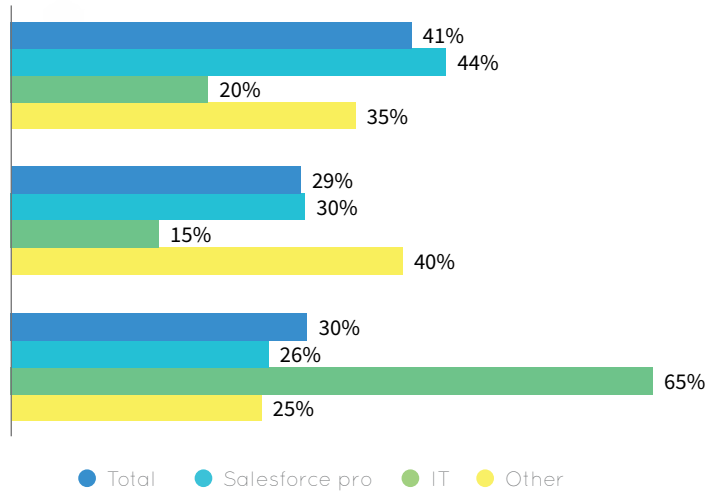
*Question was only asked to Salesforce, IT, and Other professionals.*

● Total ● Salesforce pro ● IT ● Other

## User adoption is key

The results suggest it is critical to foster user adoption by developing processes and procedures that both encourage and require users to move away from old habits and strategies.

Further, complex data ecosystems lacking a universally defined source of record must deal with disparate, inconsistent data across non-integrated or poorly integrated systems. Defining the source or record, whether it be Salesforce or some other data storage system, provides a working roadmap for how data needs to flow into and out of the source and how other systems need to relate to the source.

*A third agree that Salesforce should serve as the primary data warehouse, but users don't consistently enter data.*

# Optimizing Salesforce for decision-making

A key purpose of any CRM like Salesforce is to be able to make decisions faster.

Finding critical information with a glance at a dashboard or via native reporting, finding metrics that answer key business questions like which leads are the hottest, what's the best selling product, or how engaged are the top donors, should be quick and easy.
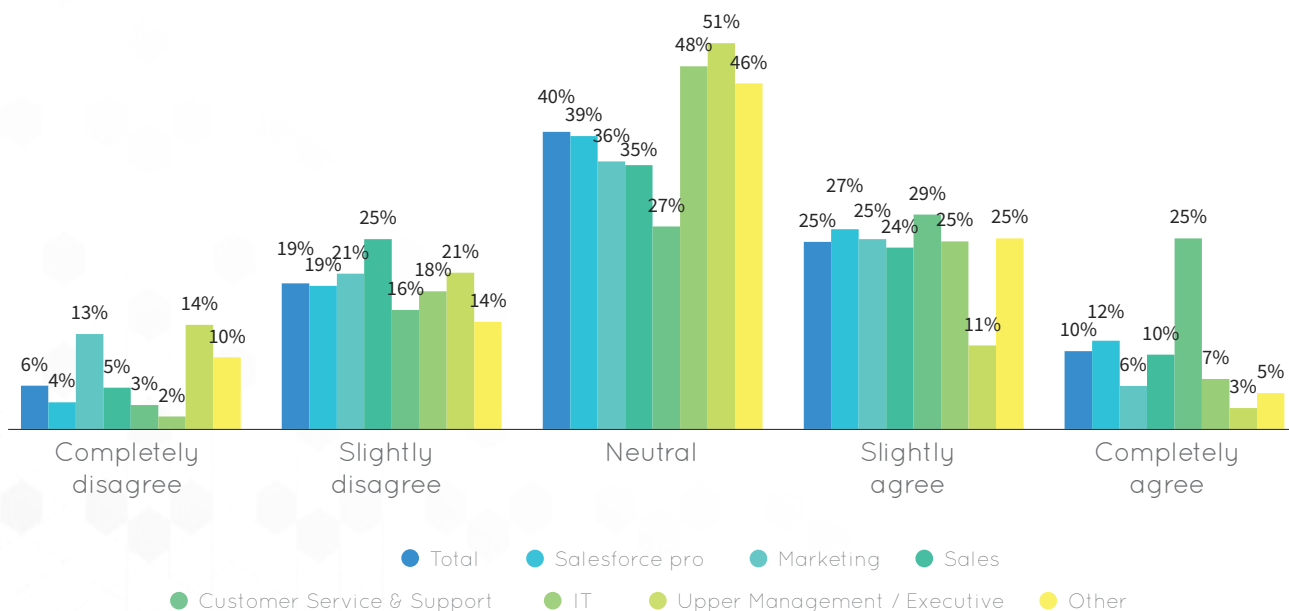
**But is the average Salesforce org**

adequate for providing these insights, and is the average user confident enough in the data to rely on it for answers?

Thirty-five percent of users feel a small degree of confidence that their Salesforce environment allows them to make actionable decisions, while **a majority (65 percent) do not have confidence in their data at all.**[F2] A small segment (10 percent) believes their org

**Do you agree or disagree with the following statement:
My Salesforce org is fully optimized to make actionable decisions?**



Legend: Total, Salesforce pro, Marketing, Sales, Customer Service & Support, IT, Upper Management / Executive, Other
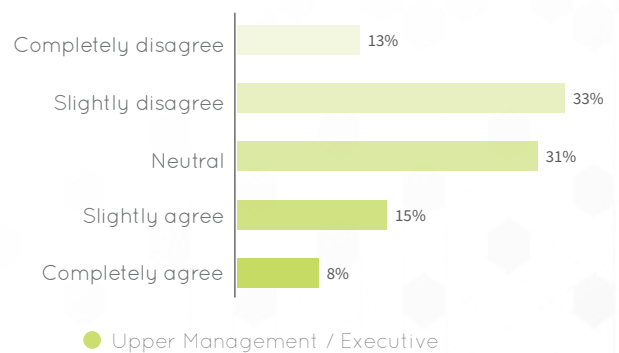
fully equips them to garner critical insight on which to make actionable decisions.

**The data tells an interesting story of those in upper management and executive roles.** This group seems to view their Salesforce orgs through rose-colored glasses. Compared to the 65 percent of respondents who feel they lack the ability to make decisions based on the data and quality of that data within their orgs, almost half (46 percent) of management disagree and thinks their orgs are fully optimized to allow decision makers across departments to effectively do their jobs.[F3]

**Do you agree or disagree with the following statement: My Salesforce org is fully optimized to allow decision across departments to effectively do their jobs?***

| Category | Percent |
|---|---|
| Completely disagree | 13% |
| Slightly disagree | 33% |
| Neutral | 31% |
| Slightly agree | 15% |
| Completely agree | 8% |

● Upper Management / Executive

*Question was only asked to those in an upper management or executive role.*

## Is there a disconnect?

This statistic leaves many to question as to whether there is a disconnect between management's expectations of their teams' ability to act on the data and metrics available to them, and the reality of how workers in the trenches, touching the data on a daily basis, really feel about the usefulness and quality of that data to make decisions.

**65% do not have confidence in their data at all.**

# Rating Salesforce

How happy are Salesforce users in terms of: ease of use, gaining actionable insights, variety of data and information, rate and speed of data collection, analytical and reporting power, and quality of data?

# 64%
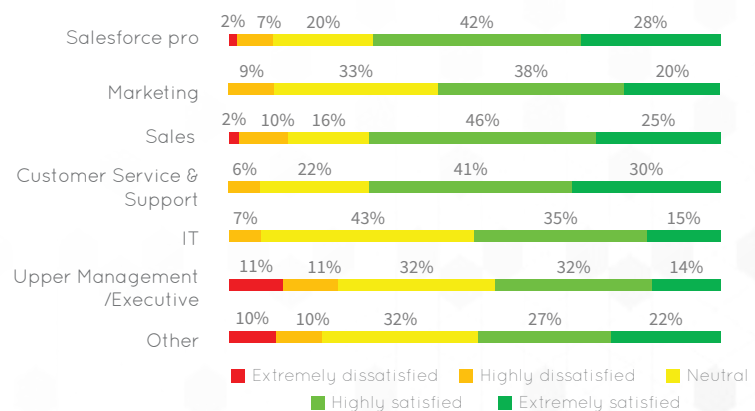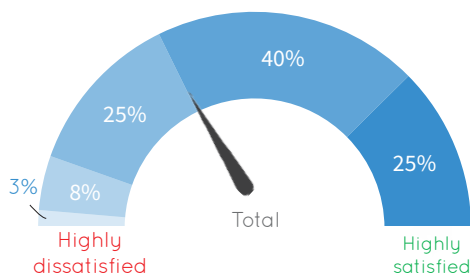are happy with their org's ability to give them actionable insights

## Salesforce's ease of use

Far more Salesforce users find the Salesforce platform easy to use than those who find it difficult to use. In fact, of all the characteristics we asked respondents to rank, ease of use saw the highest satisfaction rating over any other characteristic. Sixty-five percent of those polled indicate a high satisfaction level in terms of ease of use, compared to just 11 percent who are dissatisfied.[F4]

**Fig. 4**

### How satisfied are you with your Salesforce environment's ease of use?

3%
8%
25%
40%
25%

Highly dissatisfied

Total

Highly satisfied

| | Extremely dissatisfied | Highly dissatisfied | Neutral | Highly satisfied | Extremely satisfied |
|---|---|---|---|---|---|
| Salesforce pro | 2% | 7% | 20% | 42% | 28% |
| Marketing | | 9% | 33% | 38% | 20% |
| Sales | 2% | 10% | 16% | 46% | 25% |
| Customer Service & Support | | 6% | 22% | 41% | 30% |
| IT | | 7% | 43% | 35% | 15% |
| Upper Management /Executive | 11% | 11% | 32% | 32% | 14% |
| Other | 10% | 10% | 32% | 27% | 22% |

# Gaining actionable insights

When asked about their ability to gain actionable insights within the context of general satisfaction with the Salesforce platform, overall Salesforce users report they are happy with their environment's ability to provide metrics that lead to actionable decisions.

Across all roles, 64 percent reported a high level of satisfaction, while 7 percent indicated a low level.[F5]
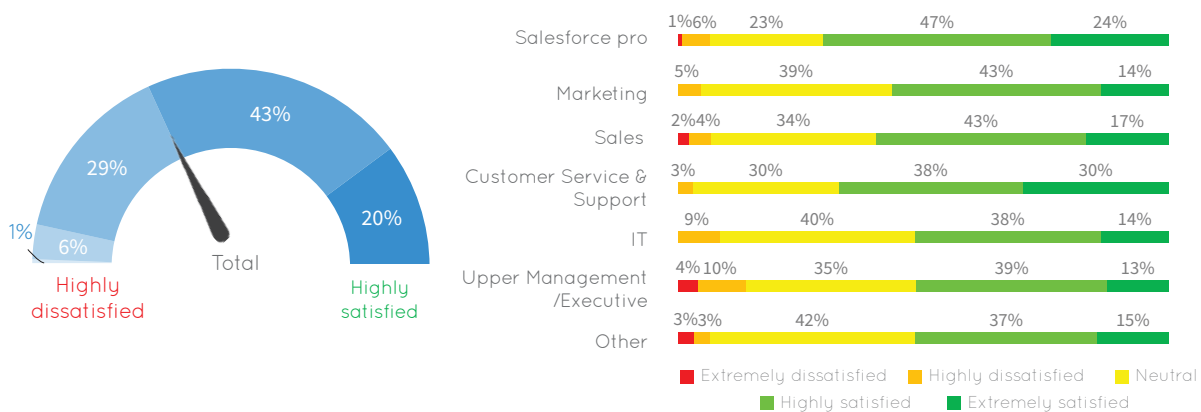
Interestingly, this data seems to contradict the section above, however there are two key differences.

First, here respondents were asked about actionable insight within the context of overall platform satisfaction. The subtle difference in the context of the question may indicate a view of what is possible with the platform in general vs. how respondents feel about the specifics of their own data (the context of the question above).

Second, the question above separates management levels from non-management whereas this section looks across all user/respondent categories.

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**Fig. 5**

**How satisfied are you with your Salesforce environment's ability to provide actionable insights?**



| | Extremely dissatisfied | Highly dissatisfied | Neutral | Highly satisfied | Extremely satisfied |
|---|---|---|---|---|---|
| Salesforce pro | 1% | 6% | 23% | 47% | 24% |
| Marketing | | 5% | 39% | 43% | 14% |
| Sales | 2% | 4% | 34% | 43% | 17% |
| Customer Service & Support | | 3% | 30% | 38% | 30% |
| IT | | 9% | 40% | 38% | 14% |
| Upper Management /Executive | 4% | 10% | 35% | 39% | 13% |
| Other | 3% | 3% | 42% | 37% | 15% |

Gauge: 1% Highly dissatisfied, 6%, 29%, 43% Total, 20% Highly satisfied
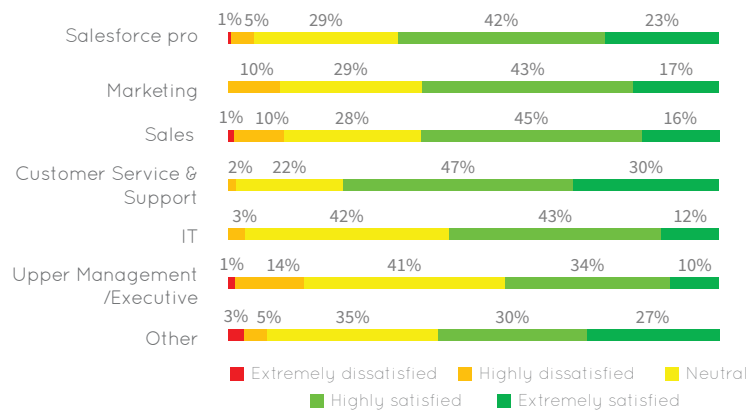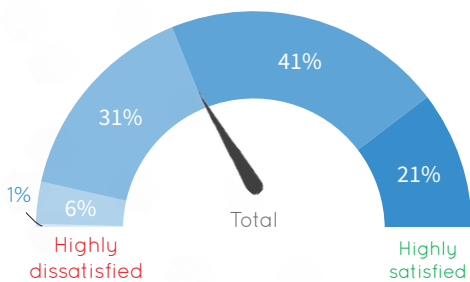
# Variety of data and information

Sixty-two percent of Salesforce users indicate a high level of satisfaction with the variety of data held in their orgs, making this category the third highest with respect to overall satisfaction with the platform.[F6]

Again, there may be an apparent contradiction here when overlaying this response to questions elsewhere in the survey about data enrichment and quality vs. quantity considerations. But given the overall focus on satisfaction with the Salesforce platform that this section takes, we can assume respondents focused more on functional aspects of data variety, for example, logical field values to collect when building a record, over more analytical types of data like purchasing habits.



*Fig. 6*

**How satisfied are you with your Salesforce environment's variety of data and the information that is collected?**

| | Extremely dissatisfied | Highly dissatisfied | Neutral | Highly satisfied | Extremely satisfied |
|---|---|---|---|---|---|
| Salesforce pro | 1% | 5% | 29% | 42% | 23% |
| Marketing | | 10% | 29% | 43% | 17% |
| Sales | 1% | 10% | 28% | 45% | 16% |
| Customer Service & Support | | 2% | 22% | 47% | 30% |
| IT | | 3% | 42% | 43% | 12% |
| Upper Management /Executive | 1% | 14% | 41% | 34% | 10% |
| Other | 3% | 5% | 35% | 30% | 27% |

Gauge: 1%, 6%, 31%, 41%, 21% — Total — Highly dissatisfied / Highly satisfied
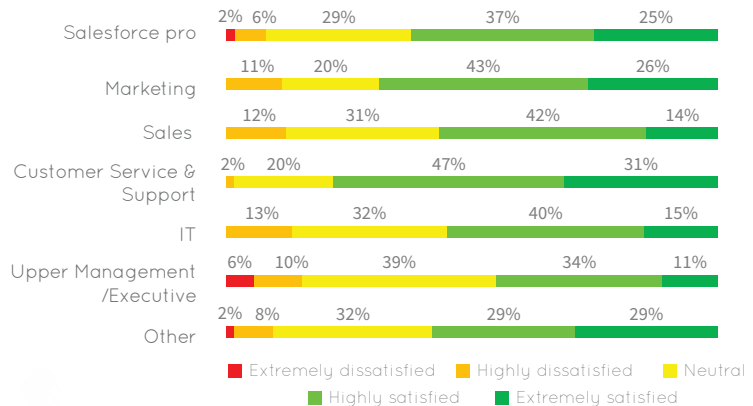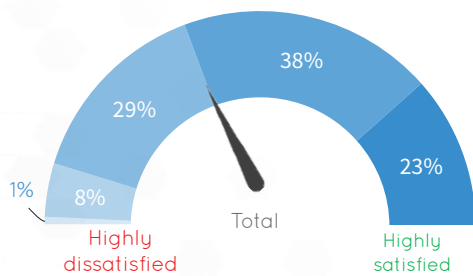
# Rate and speed of data collection

When it comes to getting data quickly, the average Salesforce user has little issue with speed. A majority of users (61 percent) are satisfied with the rate and speed of data entry and manipulation within their orgs, while 10 percent disagree.[F7] This metric suggests the Salesforce platform, as a cloud-based shared service, is generally robust enough to maintain high performance levels, however satisfaction with speed and responsiveness tends to be highly subjective, which may explain this category's fourth place ranking.

*A majority are satisfied with the rate and speed of data entry and manipulation.*

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*Fig. 7*

**How satisfied are you with your Salesforce environment's rate and speed of data collection?**



Gauge chart (Total):
- 1% Highly dissatisfied
- 8%
- 29%
- 38%
- 23% Highly satisfied

| | Extremely dissatisfied | Highly dissatisfied | Neutral | Highly satisfied | Extremely satisfied |
|---|---|---|---|---|---|
| Salesforce pro | 2% | 6% | 29% | 37% | 25% |
| Marketing | | 11% | 20% | 43% | 26% |
| Sales | | 12% | 31% | 42% | 14% |
| Customer Service & Support | 2% | | 20% | 47% | 31% |
| IT | | 13% | 32% | 40% | 15% |
| Upper Management /Executive | 6% | 10% | 39% | 34% | 11% |
| Other | 2% | 8% | 32% | 29% | 29% |

# Analytical and reporting power

In terms of the ability to analyze and report on the data inside their org, just over half of Salesforce users (59 percent) feel their environment allows them to pull data into meaningful formats that enable critical review and consideration.[F8]

Though reporting and analytics were viewed positively by more than half of those polled, it is likely important to recognize that this category was ranked favorably by only just over half of respondents, and it was ranked fifth among other areas of satisfaction.



**Fig. 8**

**How satisfied are you with your Salesforce environment's analytical and reporting power?**
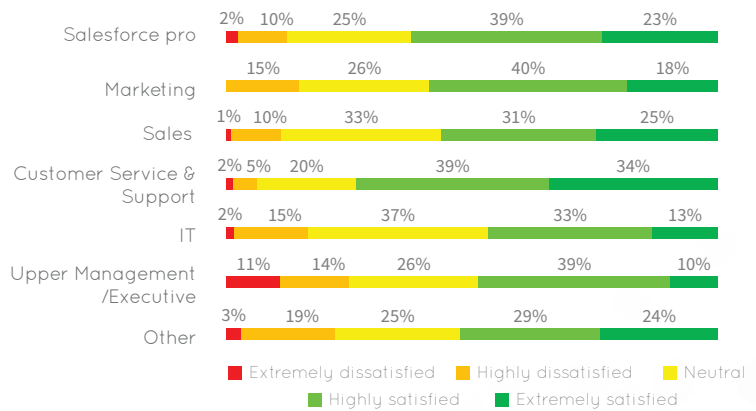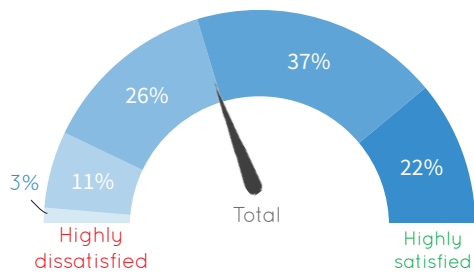
# Overall quality of the data

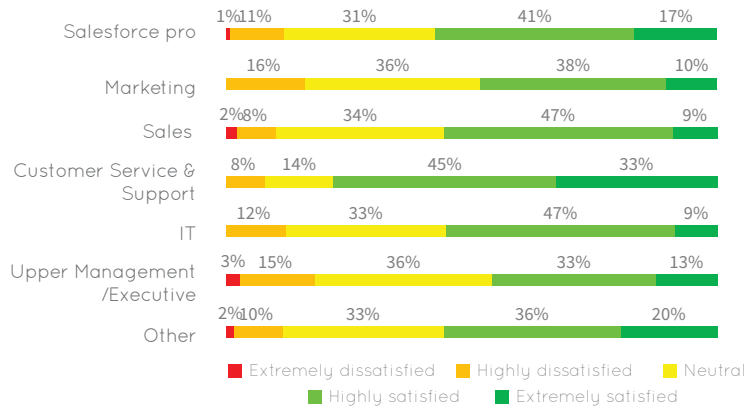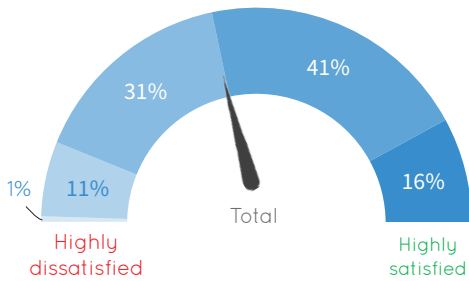**The area with the most room for improvement is data quality.**

When asked to rank their satisfaction with their data quality, respondents showed the highest levels of dissatisfaction towards data quality compared to any other category. Only about half of all respondents (57

percent) are satisfied with the quality of their data.[F9]

So while users tend to rank the functional aspects of operating a Salesforce org fairly highly, the usefulness and value of the data held in a Salesforce org gets much more mixed reviews.

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**How satisfied are you with your Salesforce environment's overall data quality?**



| | Extremely dissatisfied | Highly dissatisfied | Neutral | Highly satisfied | Extremely satisfied |
|---|---|---|---|---|---|
| Salesforce pro | 1% | 11% | 31% | 41% | 17% |
| Marketing | | 16% | 36% | 38% | 10% |
| Sales | 2% | 8% | 34% | 47% | 9% |
| Customer Service & Support | | 8% | 14% | 45% | 33% |
| IT | | 12% | 33% | 47% | 9% |
| Upper Management /Executive | 3% | 15% | 36% | 33% | 13% |
| Other | 2% | 10% | 33% | 36% | 20% |

Gauge chart — Total: Highly dissatisfied 1%, 11%, 31%, 41%, 16% Highly satisfied

# So, who's the happiest?

### The most unhappy

It is interesting to note that across all of the categories above, upper management and executive professionals reported the highest levels of dissatisfaction in every area. Their greatest degree of dissatisfaction lies within the analytical and reporting power their Salesforce environment provides them. A quarter (25 percent) indicated a low level of satisfaction.[F8]

### The happiest

Conversely, the most satisfied department is Customer Service and Support. Of these professionals, 70 percent or more indicated a high level of satisfaction across all of the categories. The exception is when it comes to the ability to gain actionable insights. Salesforce administrators and consultants ranked as the most satisfied group within this category (70 percent) followed by customer service and support specialists (67 percent).[F5]

A caveat to the above data is that different roles use Salesforce in different ways. For example, a customer service or support user likely relies on basic customer contact data and uses the platform for logging and inserting case notes. For this group of users, functional matters rank highly. Whereas management and executive users rely on metrics and analytics – things that are entirely tied to reporting abilities and, most importantly, to the completeness, quality, and cleanliness of the data from which those metrics are being pulled.

# A Focus on Data Quality

How does the average Salesforce org stack up in terms of data quality? What are the top motivators for high data quality?

# 1/3
## of Salesforce data is duplicated

## Measuring data quality

The definition of good data quality varies from business to business. Data is always prone to errors and will never be perfect, but setting a tolerance level helps determine the threshold at which data is considered either "good" or "bad." Evaluating a dataset's accuracy, completeness, and uniqueness are three significant components that can help define what constitutes "good" and "bad" data within your organization. And of course characteristics like accuracy
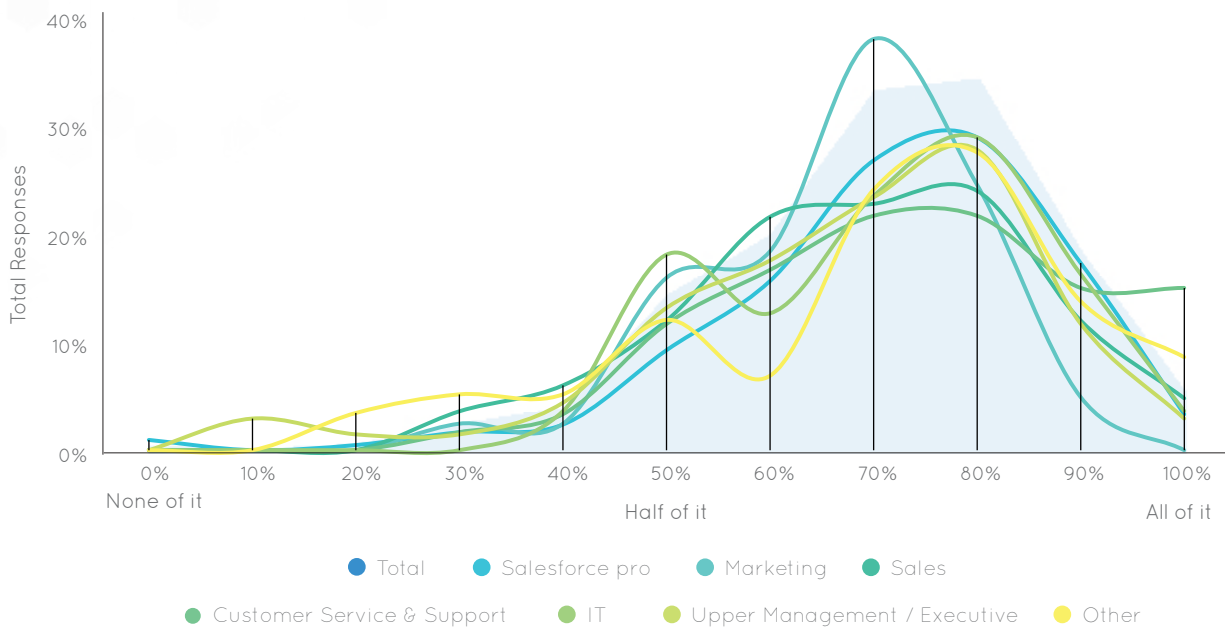
and completeness need to be considered in light of how they align with business processes and needs. What might be considered an accurate and complete record in one context may not be regarded in the same way in a different context.

**So, how does the average Salesforce org stack up in terms of data quality?** Let's examine the accuracy, completeness, and uniqueness of data.

# Accuracy

**What percentage of your Salesforce data do
you estimate to be accurate?**



Total Responses

40%
30%
20%
10%
0%

0%
None of it

10% 20% 30% 40% 50%
Half of it

60% 70% 80% 90% 100%
All of it

● Total   ● Salesforce pro   ● Marketing   ● Sales

● Customer Service & Support   ● IT   ● Upper Management / Executive   ● Other

**How reliable is the data to correctly report business metrics?**
About two-thirds of Salesforce users believe that most of their data is accurate.[F10]
Sixty-eight percent of respondents indicate that 80 percent or more of their data is
accurate, however, a significant portion (17 percent) reports that up to half of their
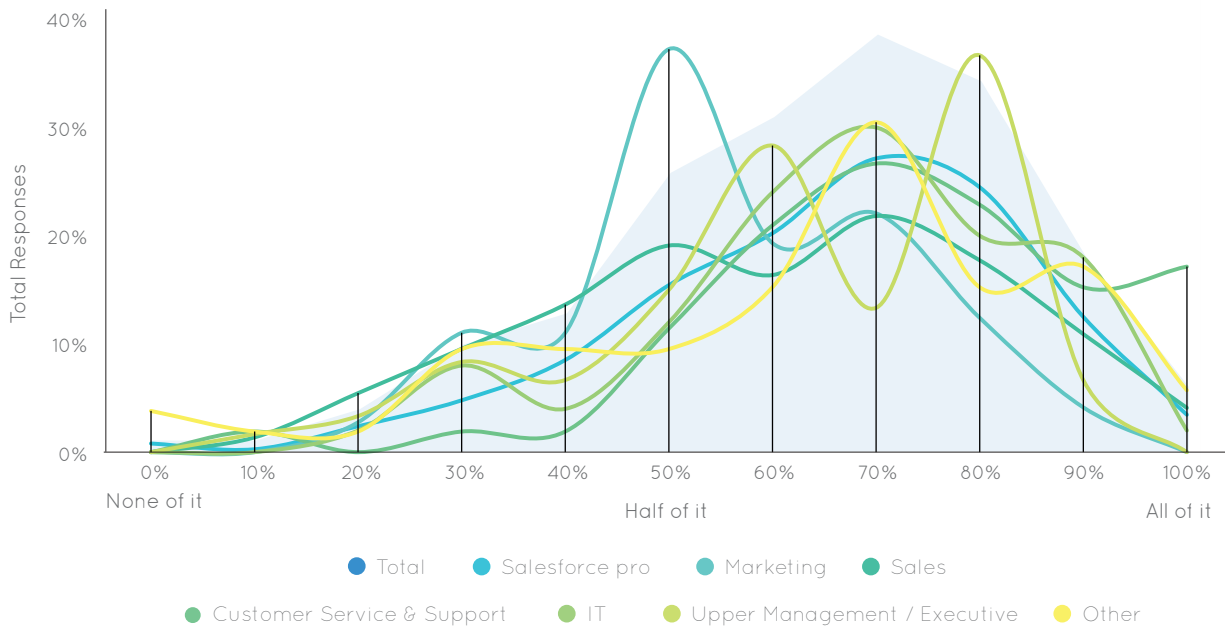dataset is inaccurate.

# Completeness

**How much of the data is filled with holes or missing information?**

When it comes to completeness, just over half of Salesforce users (53 percent) have a dataset that is composed of 70 percent or more complete records.[F11] The other half (47 percent) believe 60 percent of their data is incomplete. Customer service and support professionals have the highest confidence in the completeness of data. Twenty-seven percent say that 90 percent or more of their data is complete.

Completeness is of course subjective. Important data points vary from organization to organization and depend on what data is collected and what data is actually needed operationally. The range of responses to this question is interesting, with incompleteness spanning 10 to 60 percent.



**Fig. 11**

**What percentage of your Salesforce data do you estimate to be complete?**

Legend: Total, Salesforce pro, Marketing, Sales, Customer Service & Support, IT, Upper Management / Executive, Other

# Uniqueness

**How much of the data is duplicated?**

Although most users have an optimistic view of their Salesforce data in terms of accuracy and completeness, duplicate records pose a major problem. Duplicate records comprise up to a third of Salesforce users' total dataset, according to a majority of respondents (78%).[F12]

The survey results suggest there seems to be a bit of a contradiction here with a majority of respondents having a positive view of accuracy and completeness, yet a majority of those same respondents feel their data has significant problems with repetition and duplication.



*Fig. 12*

**What percentage of your Salesforce data do you estimate to be duplicated?**
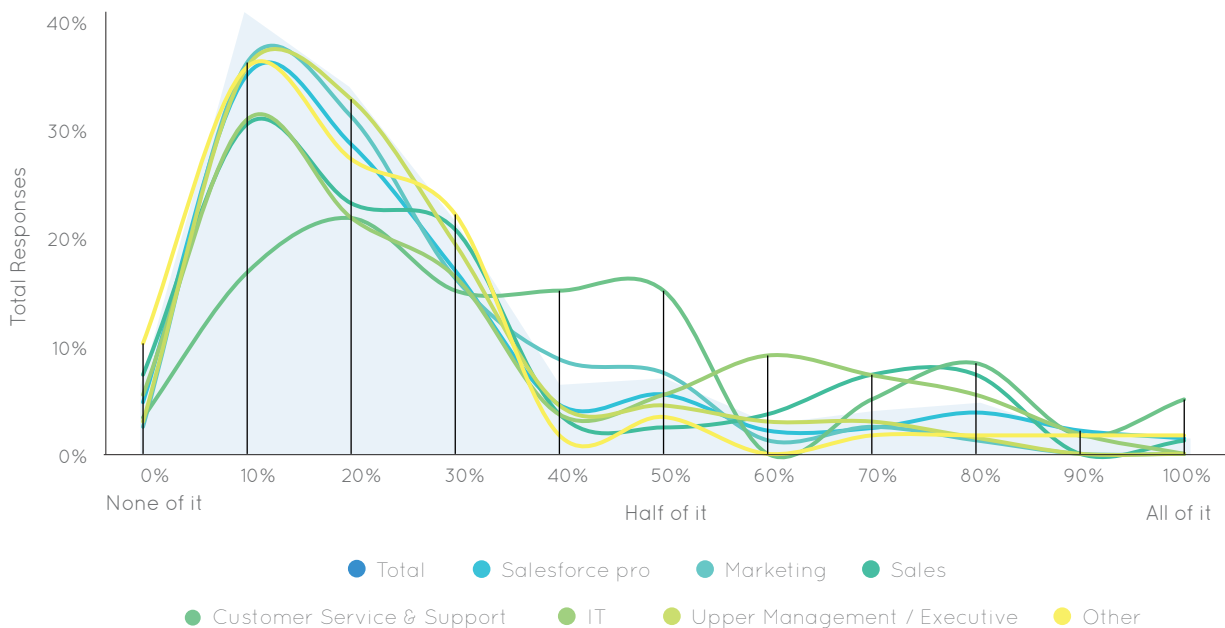
# The impact of data quality

These statistics represent averages of responses to inquiries about data quality. But as noted, data quality is both a function of perception, as well as specific to the operational needs of the organization.

On average, respondents report what appear to be reasonable levels of accuracy and completeness in their data. Accuracy is reported to be around 80% while completeness averages about 65%.

These figures may not seem too bad when you consider how difficult data maintenance can be. However, if we take a look at things from the other perspective—20% of records are inaccurate and on average 35% of records are incomplete—we may think differently about data quality. **How do these levels impact business-level reporting and analyses?** Would a business be satisfied if a critical report had a 20% margin of error, or if sales numbers are off by 20%?

## What's the quality of your Salesforce data?

Removing duplicates can be complicated, but Cloudingo takes away the frustration, leaving you with clean and more reliable data.

Try Cloudingo free, and within minutes see how many duplicates are sitting in your org right now.

GET A FREE DATA QUALITY REPORT
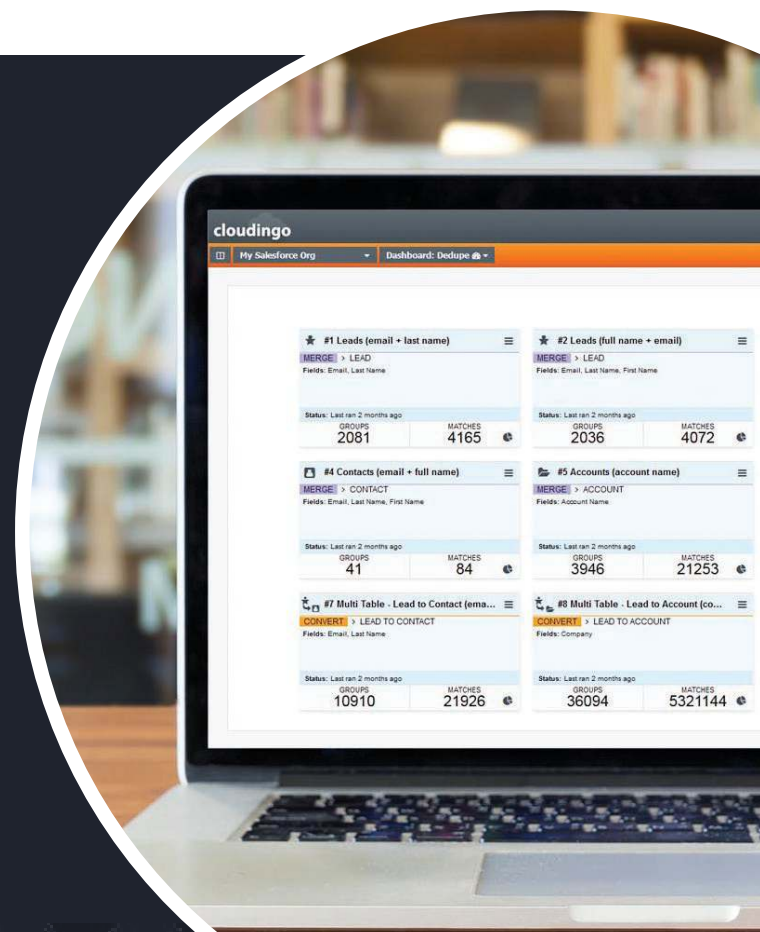
# Can Salesforce data be trusted?

When it comes to whether or not their datasets are reliable, the majority of Salesforce users say they are not. The largest number of respondents (58 percent) indicated that up to 80 percent of their data is not useful and reliable, meaning that less than a quarter (20 percent) of data is completely actionable and trustworthy.[F13] The view that data is unreliable is highest among marketing and sales professionals where only one a quarter of respondents (approximately 25 percent) say that 80 percent or more of their data is useful and trustworthy.

*Fig. 13*

### What percentage of your Salesforce data is useful and reliable?
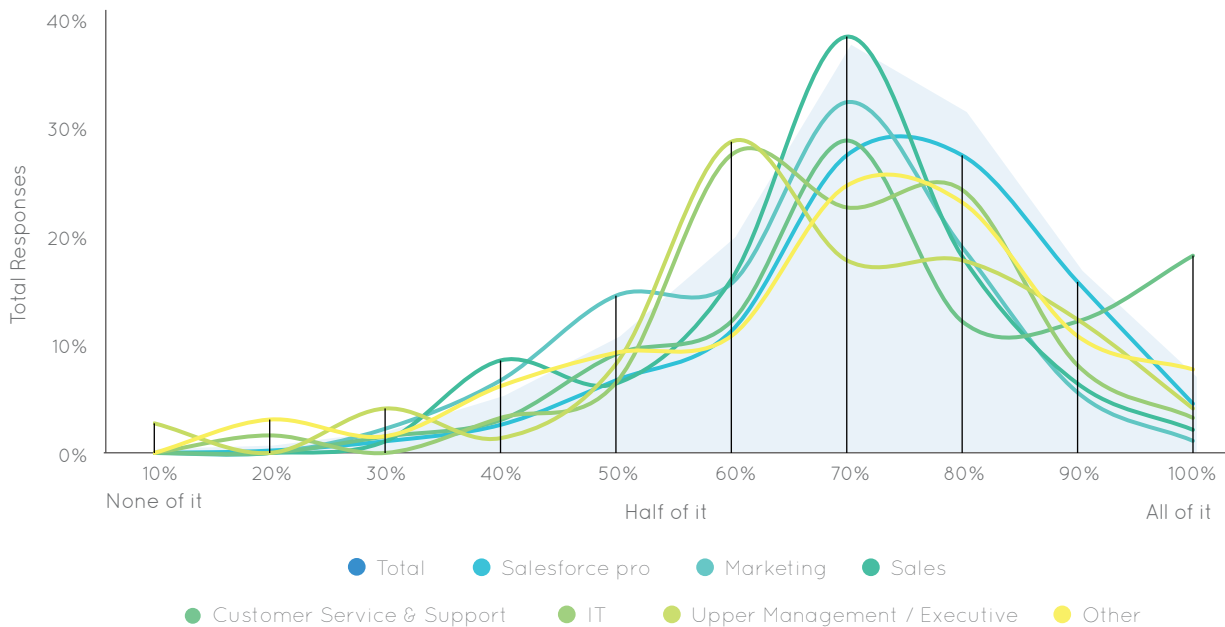
# Why is data untrustworthy?

Respondents who indicated that up to three-fourths of their data is not useful or reliable where asked to identify what was preventing data from being more useable and reliable.

**The top three attributes that make data unreliable:**

### 1. Poor data quality

Over a third (38 percent) attribute duplicate records, errors, and outdated information as the reasons why their dataset is unreliable.[F14] One respondent wrote, "Turnover in our industry is high. We can't keep up with changing jobs of contacts and leads." Another respondent blamed duplicate records specifically saying, "We catch duplicates coming into [Salesforce], but we're not easily able to fix the ones already there."

*"A lot of information is manually entered which leads to errors."*

### 2. Siloed data

For more than a quarter of Salesforce users (28 percent), data becomes useless when it's spread across different platforms outside of Salesforce, like in Point of Sale (POS) systems or spreadsheets. [F14] Getting a single view of the data is nearly impossible and the ability to accurately and easily draw conclusions and analyze metrics is limited.

### 3. Relevant info

If you collect a hundred different data points, what good is the information if the key metrics you need aren't there, or if your strategists haven't come up with a way to report against and utilize the data that's been collected? Having a dataset that lacks useful and relevant data to provide actionable insights is another reason why

Salesforce users have unreliable data, according to 19 percent of respondents. [F14] In contrast, one respondent placed blame on too much information: "We have multiple types of records that can sometimes lead to data overload."
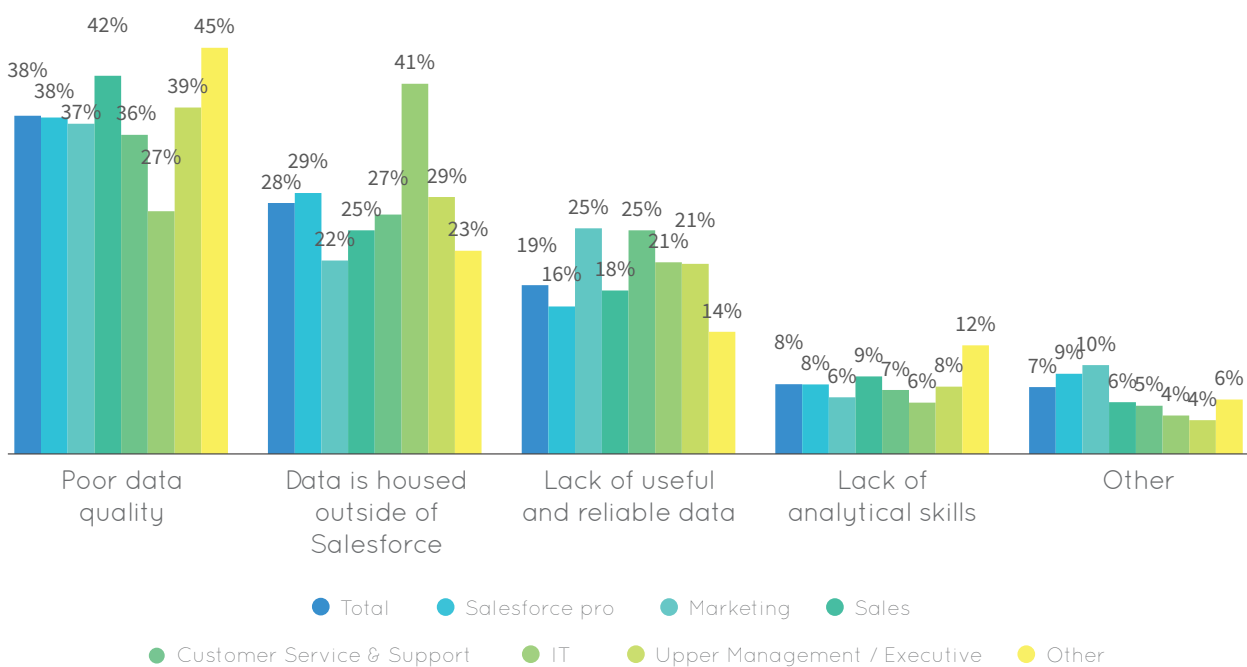
Poor data quality, siloed data, and lacking relevant information are ranked as the top three ingredients of untrustworthy data across all roles, except among IT professionals who blamed siloed data as the number one inhibitor (41 percent).

Other respondents pointed to inconsistencies in manually entered data (the human error factor): "Some data. com information is limited, and not all users have access to data.com. A lot of information is manually entered which leads to errors," one respondent wrote.

Others said they simply don't have enough time or resources dedicated to data maintenance. A respondent said, "We lack the time to configure and architect our org properly so that data capture occurs in the right places."

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**Fig. 14**

### What prevents your data from being more useful and reliable?*



Poor data quality: 38%, 38%, 37%, 42%, 36%, 27%, 39%, 45%

Data is housed outside of Salesforce: 28%, 29%, 22%, 25%, 41%, 27%, 29%, 23%

Lack of useful and reliable data: 19%, 16%, 25%, 18%, 25%, 21%, 21%, 14%

Lack of analytical skills: 8%, 8%, 6%, 9%, 7%, 6%, 8%, 12%

Other: 7%, 9%, 10%, 6%, 5%, 4%, 4%, 6%

Legend: Total, Salesforce pro, Marketing, Sales, Customer Service & Support, IT, Upper Management / Executive, Other

*Respondents were allowed to select multiple answers.*

# Who's responsible for data quality?

How often are your Salesforce records checked for errors? Do you have validation and standardization process in place? What happens to new data when it enters your org? These are all questions that someone who is responsible for maintaining data quality needs to answer.

### Identifying the data steward

When it comes to maintaining data quality, the greatest burden is on Salesforce administrators, often the presumed data steward. Overall 32 percent say the Salesforce admin is accountable, with record owners (16 percent) and the sales department (15 percent) following immediately behind.[F15]
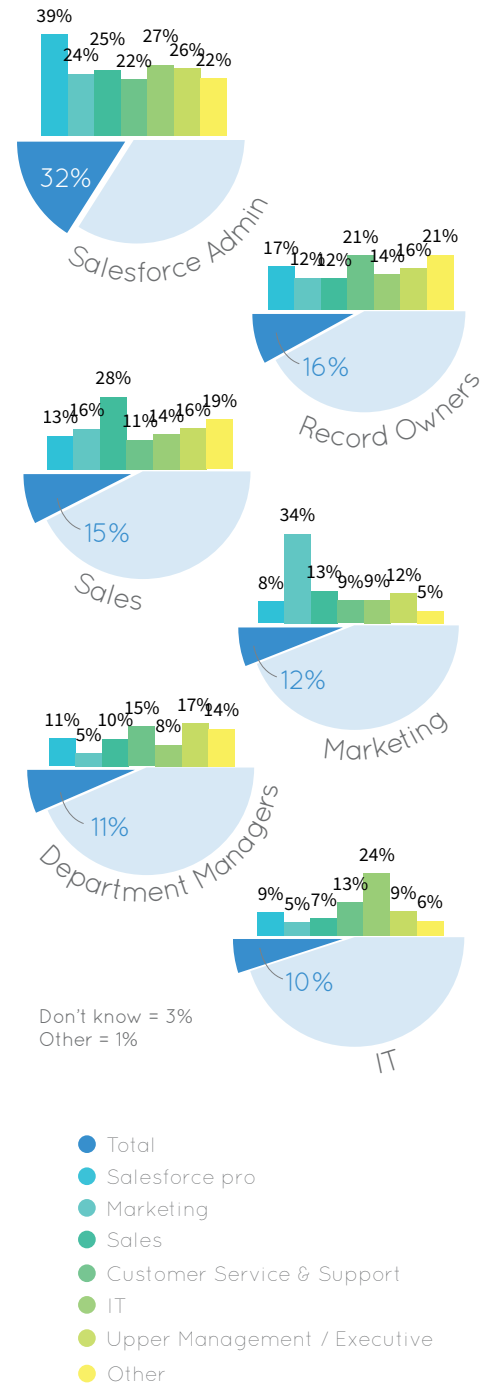
However, when breaking down the responses by role, marketing professionals feel the burden is on themselves (34 percent) while those in a sales role (28 percent) say their department has the most responsibility. All other roles agree that the Salesforce admin has the most responsibility.

### What does this mean for Salesforce admins and data stewards?

It means they need to be aware – aware of what data is critical for every operational unit; aware of errors and duplicates; and they must be aware of internal business processes to ensure that the data

**Who is responsible for maintaining data quality?***

Salesforce Admin: 39% 24% 25% 22% 27% 26% 22% — Total 32%

Record Owners: 17% 12% 12% 21% 14% 16% 21% — Total 16%

Sales: 13% 16% 28% 11% 14% 16% 19% — Total 15%

Marketing: 8% 34% 13% 9% 9% 12% 5% — Total 12%

Department Managers: 11% 5% 10% 15% 8% 17% 14% — Total 11%

IT: 9% 5% 7% 13% 24% 9% 6% — Total 10%

Don't know = 3%
Other = 1%

- ● Total
- ● Salesforce pro
- ● Marketing
- ● Sales
- ● Customer Service & Support
- ● IT
- ● Upper Management / Executive
- ● Other

*Respondents were able to select multiple answers.*

coming into Salesforce is being entered and utilized in a way that best suits individual and team goals.

And perhaps equally important is that data stewards need to be equipped with the authority to set and enforce data policies as well as managing the dataset in a way the raises its level of quality. It makes no sense to charge an individual or team with maintaining data quality, but then prevent them from merging duplicate records without the authorization of members from marketing, sales, or other teams.

Although Salesforce admins have the most responsibility, the best data quality results come from a team effort. Each Salesforce user must make an effort to ensure the data they enter is correct, their records are updated, and data quality best practices are followed.

## Round Table Chat

Learn about data quality misconceptions and some not-so-common ways to make Salesforce data more reliable, trustworthy, and cleaner in the expert round table chat.

WATCH VIDEO

# Frequency of data cleansing

One aspect of having high data quality is ensuring the data is clean. This involves updating, standardizing, deleting, and deduping Salesforce records.

A big mistake organizations often make is thinking that data cleansing is a "one and done" process. Businesses focus far more on ensuring new data is held to the highest standards, while older data gets ignored. Data cleansing needs to be done at both the point of entry and periodically throughout the dataset's lifecycle to safeguard existing data from any inconsistencies or duplication.

A majority of Salesforce admins and consultants make data cleansing and deduping a part of their monthly (21 percent), weekly (22 percent), and even daily (20 percent) goals.[F16] An alarming 15 percent of Salesforce admins never clean or dedupe their orgs at all.

*Fig. 16*

### How often do you clean and dedupe Salesforce data?*

Never — 15%
Once a year — 7%
Every 6 months — 15%
Monthly — 21%
Daily — 20%
Weekly — 22%
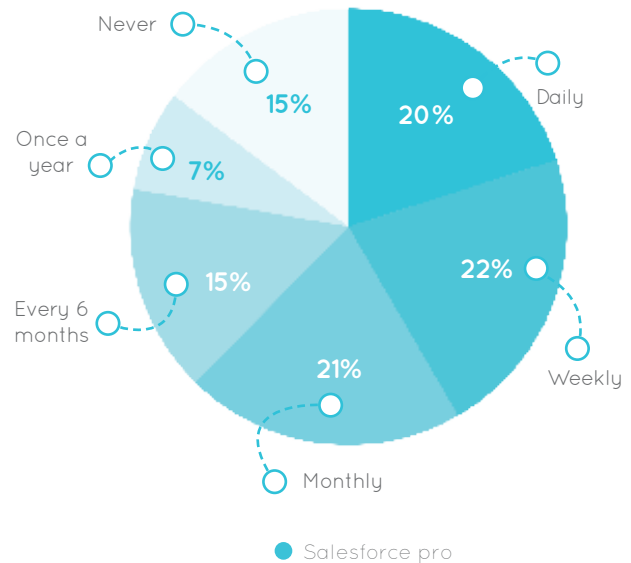
● Salesforce pro

*Question was only asked to those in a full-time Salesforce role.*

## How often should you clean your data?

To determine how often data should be cleaned, it's important to understand how often your data changes. Consider how frequently new data enters your Salesforce environment and from where, and the rate at which that data decays or becomes stale. For B2B organizations, taking into account the average turn-over rate of your client base can help determine how quickly your data will age and no longer be accurate.

## 43%
## Want better decision making and reporting

## Motivators for data quality

Having data that is accurate, complete, and consistent is essential for operational and transactional purposes. But obtaining high data quality usually involves a monetary and time investment.

Typically business stakeholders and those holding the purse strings are professionals in an upper management or executive role. So what's the reason why this group justifies allocating time, money, and resources on data quality?

According to the survey, a large group of upper management and executives (43 percent) say the biggest motivator for achieving high data quality is to allow

for better decision making and reporting efforts.[F17] Improving productivity and generating sales growth are also motivators but to a far lesser degree (26 and 24 percent respectively).

*Fig. 17*

### What is your biggest motivator for achieving high data quality?*

| | |
|---|---|
| 43% | Better decision making and reporting |
| 26% | Improve productivity |
| 24% | Generate sales growth |
| 7% | Gain complete customer/organizational picture |

● Upper Management / Executive

*Question was only asked to those in an upper management or executive role.*
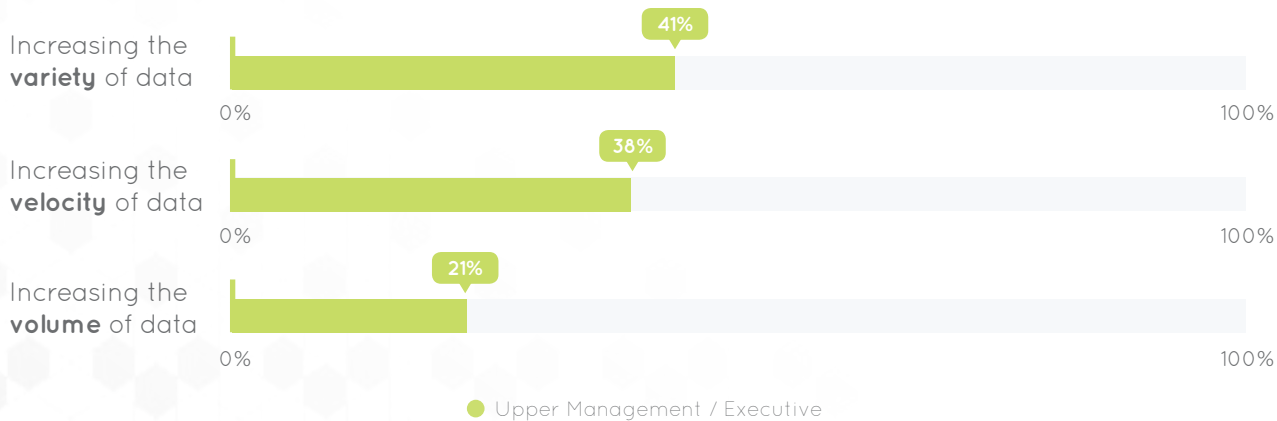
# Organizations need more variety in their data

Volume, variety, and velocity are used to describe three dimensions of big data. Volume refers to the amount of data, variety refers to the different types of data, and velocity refers to the speed at which data is gathered.

Given the choice between increasing the volume, variety, or velocity of data, 41 percent of those in an upper management or executive role say the greatest benefit to their business today is variety.[F18] Collecting data at a faster rate is the second most beneficial, and increasing the amount of data being the least beneficial.

This trend suggests that organizations need more meaningful data at a quicker pace, rather than a large pot of useless information. The assumed benefit of greater variety in one's data is that such variety allows for greater precision with targeted sales and marketing efforts. A lot of resources can be spent ineffectively on cold calling and email marketing to a large list of "general" prospects. The results are thin at best. But with greater variety in the data points available, precision becomes a characteristic of outreach efforts, likely driving better results.

**Fig. 18**

## Which goal would be the most beneficial to your business today?*

Increasing the **variety** of data — 41%
0% — 100%

Increasing the **velocity** of data — 38%
0% — 100%

Increasing the **volume** of data — 21%
0% — 100%

● Upper Management / Executive

*Question was only asked to those in an upper management or executive role.*

# The biggest blind spots

Learning as much as you can about your customers is a critical aspect of delivering excellent customer experiences.
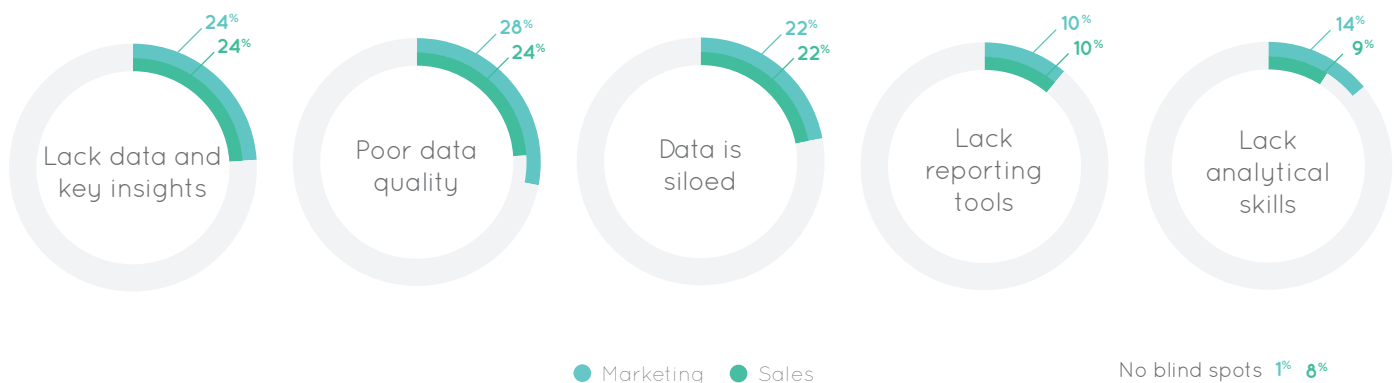
When you have a complete 360-degree view of your customer base, you're able to deliver more relevant and personalized messages to your target market. You can better predict your customers' needs and preferences. You'll lessen the risk of frustrating customers and damaging your organization's reputation.

The key to obtaining a complete 360 degree view of prospects and customers is clean and relevant data.

Both marketers and salespersons say that without good data, gaining a full customer profile produces blind spots. Over half of the respondents blame poor data quality and lack of data collection that provides key insights as the main reasons for not having a complete picture.[F19] Data that is not integrated into one single system and is instead siloed across different platforms is the third most popular limitation, with lack of analytical skills and lack of reporting tools following behind.



**Fig. 19**

**When it comes to getting a complete 360 degree view of prospects and customers, what are your blind spots?***

| Lack data and key insights | Poor data quality | Data is siloed | Lack reporting tools | Lack analytical skills |
|---|---|---|---|---|
| 24% / 24% | 28% / 24% | 22% / 22% | 10% / 10% | 14% / 9% |

● Marketing  ● Sales

No blind spots  1%  8%
Other  1%  2%

*Question was only asked to those in a marketing or sales role.*
*Respondents were able to select multiple answers.*

It's never been more crucial for companies to have current and accurate information about their customers' behavior, accounts, and preferences.

Good data can transform "Shelly Martin, married, two children" into "Shelly Martin, 38, homeowner, yoga enthusiast, frequent traveler, online electronics shopper, from Chicago, IL."

Having this kind of information will allow you to successfully target Shelly with relevant offers that are more likely to turn a one-time transaction into a lifetime customer. Good data gives businesses the ability to understand more, anticipate better, and gain a competitive advantage.

But gathering good, comprehensive data is not a simple matter. A likely first, best step, is analyzing not only what you know about your customers and what data about those customers you already collect, but also what data would be useful for better targeted efforts. It is one thing to say you need better data, and something completely different to put together a strategic plan around what data you need and want to gather, how you'll gather that data, where you'll house that data, and how you will act on it.

## Guide to Nailing the Customer Experience

Delivering a personalized customer experience is the determining factor in who wins (and retains) customers. How do you go about doing this? Data. But not just any data. Clean data. Find out how to master the customer experience and the role clean data plays.

DOWNLOAD EBOOK

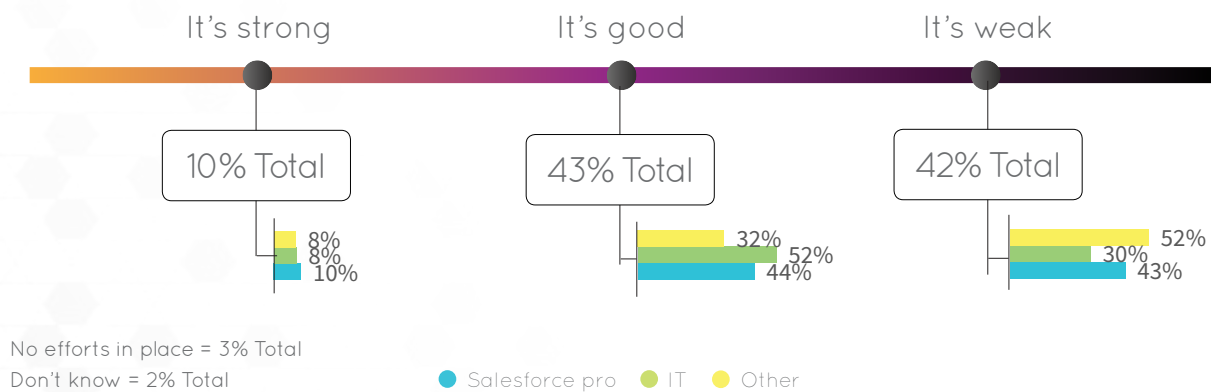# Data governance and data management efforts

Determining how data is used, accessed, and integrated is the framework of a sound data governance and data management plan. It involves a clearly defined set of procedures and objectives, and a strategy to achieve those objectives.

When asked to describe the organization's data governance and data management efforts, the majority of respondents indicated that efforts are either good or weak. Forty-three percent have procedures and processes in place that are clearly defined and enforced, while 42 percent have only some procedures and processes in place, but they are not clearly defined or enforced.[F20]

Just 10 percent describe their efforts as strong, meaning they have an array of technical tools (like a master data management system), dedicated data stewards, and automated systems that provide clear insight into the intricacies of each data process flow.

**Which statement is the most accurate when describing your organization's data governance and data management efforts?***

It's strong     It's good     It's weak

10% Total     43% Total     42% Total

| | It's strong | It's good | It's weak |
|---|---|---|---|
| Other | 8% | 32% | 52% |
| IT | 8% | 52% | 30% |
| Salesforce pro | 10% | 44% | 43% |

No efforts in place = 3% Total
Don't know = 2% Total

● Salesforce pro  ● IT  ● Other

*\*Question was only asked to Salesforce professionals and those in an IT or Other role. Answer labels edited for brevity.*

It is interesting to look holistically across the sections of this survey and reflect on how the responses relate to one another, but also at the same time often seem to counterintuitive. For example, the vast majority of respondents strongly value clean, high quality data, and recognize its importance in an effective and smooth running operation. However, running counter to that we see the same majority acknowledging that they have limited organized plans in place to manage their data in ways that make it as valuable as it can be.

*Bonus*

## Popular AppExchange Apps Salesforce Users Swear By

Out of the box Salesforce is a robust CRM. But sometimes there are scenarios where extra configurations and features are required to meet business specific needs. That's where the Salesforce AppExchange comes in.

Find out which apps users said they can't live without.

READ ARTICLE

# Overcoming Obstacles

What are the top challenges for Salesforce users? What tactics do users employ to achieve their goals?

# Top Successes for Salesforce Professionals

**Customizing Salesforce to meet organizational goals**

Like any CRM, Salesforce comes with its challenges and limitations. Given the choice of six common obstacles, Salesforce admins, consultants, and developers were able to most successfully overcome customizing Salesforce to meet the needs of the business. Forty-one percent admitted that this was the biggest challenge they recently faced but were able to overcome.[F21]

**How were they able to do this?**

One respondent said, "We have weekly meetings with different departments. The focus of the meeting is to come up with ideas that will better their work day and brainstorm how we can streamline and automate their process."

Another respondent went so far as to spend a year gathering requirements and developing relationships with project team leads to gain a better understanding of business needs and processes. They then rebuilt Salesforce from scratch to be more currently relevant and adaptable for the future.

*Fig. 21*

**In the past 12 months, which of these common Salesforce challenges have you been most successful in overcoming?***

- Empowering end users and increasing productivity — 8%
- Increasing user adoption — 14%
- Improving data quality — 24%
- Building and running reports — 10%
- Acquiring more data — 3%
- Customizing Salesforce to meet business needs — 41%
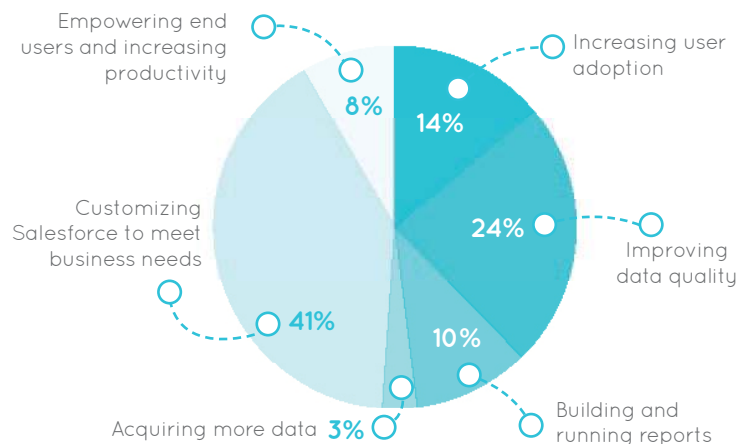
*Question was only asked to full-time Salesforce professionals.*

**Key tip: hunt and gather**

The lesson here is that careful review and analysis in order to really understand how users go about their day and complete their responsibilities serves to create a full picture of what is needed from systems like a CRM. Such an analysis, when coupled

with careful planning, forms a blueprint for how the Salesforce platform needs to be customized and configured and/or how business processes need to be codified for efficiency and effectiveness.

*"We spent a year talking with team leads to gain a better understanding of our business."*

## Top Successes for Marketers

**Measuring success and ROI**

For marketers, measuring marketing success and ROI is the biggest challenge they were able to overcome within the past year.[F22]

**How were they able to do this?**

"We take time each day to track results by hand. For some things there is simply no other way to do it. We track full funnel, channels, leads, and few more things in spreadsheets," one marketer said.

Another marketer was able to better measure marketing initiatives and ROI by constantly reporting and keeping on top of where everything is coming from: "This is a really big initiative currently that had previously been lacking."

**Fig. 22**

**In the past 12 months, which of these common marketing challenges have you been most successful in overcoming?***

- Obtaining a complete single view of customers
- Gathering enough relevant data about customers — 10%
- 8%
- Measuring marketing success and ROI — 40%
- Delivering a personalized customer experience — 17%
- Increasing customer engagement — 24%

*Question was only asked to those in a marketing role.*

### Key tip: understand your successes and failures

The takeaway here is that tracking and measurement is critical to linking results to marketing efforts. You can't make marketing more effective if you don't first understand which marketing initiatives are actually performing and returning results. When considering the role of a CRM like Salesforce in measurement and tracking, it becomes crystal clear how important the quality of the data is to those results.

# Top Successes for Salespeople

### Keeping the pipeline flowing

Moving qualified leads down the sales funnel was the biggest challenge for sales professionals but the one they were able to overcome the best.[F23]

### How were they able to do this?

One salesperson said that collecting customer data from form submissions and conversation points allowed them to better segment and target prospects based on fit. This led to better movement down the funnel from outbound efforts.:

"We added Yesware to Salesforce to create drip campaigns. This helped us maintain contact with our leads without having to constantly remember to reach out or follow-up," wrote one sales executive.

**Fig. 23**

**In the past 12 months, which of these common sales challenges have you been most successful in overcoming?***

- Decreasing the close timeline — 5%
- Matching customers' high expectations — 14%
- Moving qualified leads down the sales funnel — 32%
- Having the right data and tools in place — 22%
- Getting in touch with decision makers — 26%
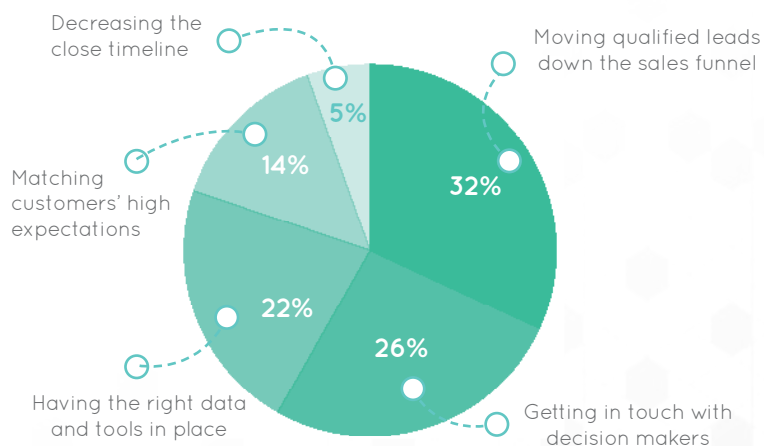
*Question was only asked to those in a sales role.*

**Key tip: lead quality matters**

Based on these results, from a sales standpoint, the quality and completeness of lead data has a direct impact on the how quickly prospects move through the sales cycle. This is not surprising information, however, it is interesting to have it validated by sales professionals who have made a concerted effort to collect, record, and use better data, and who have seen results in faster closes.
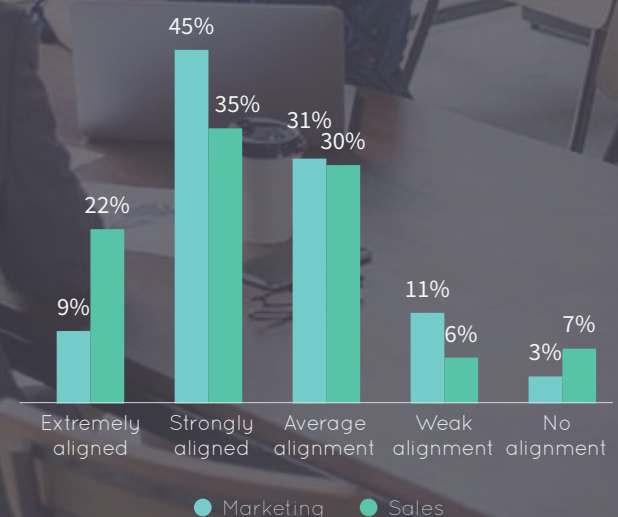
# Marketing and Sales are on the same path… depending on who you ask.

Overall marketers and salespeople agree that the two departments have a strong or extremely strong alignment when it comes to achieving business goals. However, of the two groups, salespeople are more optimistic. About a quarter (22 percent) of sales professionals say the alignment is extremely strong, while only 9 percent of marketers indicate the same.[F24] Less than a third (31 percent) say Marketing and Sales are slightly aligned.

The notable difference between how marketers view departmental alignment differently from sales is likely due, in part, to the logical flow of leads and prospects from Marketing to Sales. Sales tends to be dependent on Marketing for leads entering the sales funnel, but Marketing is not dependent, or is less dependent, on Sales for pulling in prospects.

*Fig. 24*

**Which statement best illustrates the alignment between marketing and sales?**

| | Marketing | Sales |
|---|---|---|
| Extremely aligned | 9% | 22% |
| Strongly aligned | 45% | 35% |
| Average alignment | 31% | 30% |
| Weak alignment | 11% | 6% |
| No alignment | 3% | 7% |

● Marketing  ● Sales

*Question was only asked to those in marketing and sales roles.*

# Top Successes for Customer Service & Support

**Delivering a consistent customer experience**

The biggest accomplishment that those in a customer service and support roles report having achieved is delivering a consistent customer experience across all channels, including email, live chat, telephone, face-to-face, and social media.[F25]
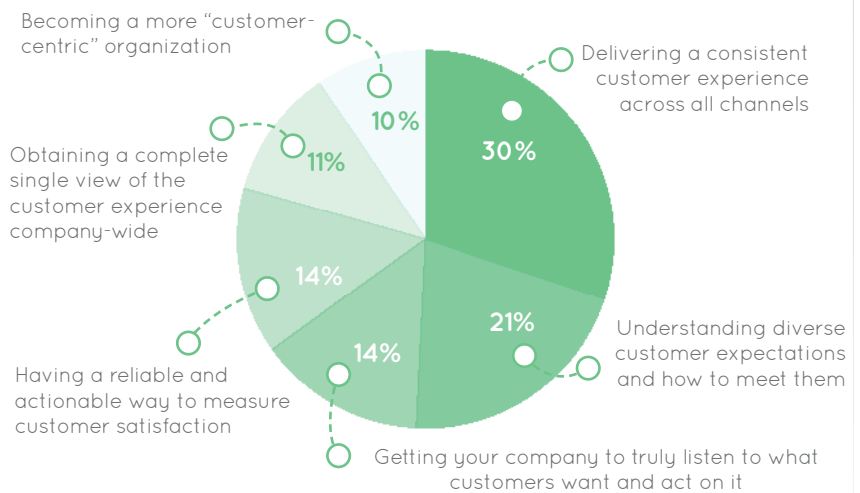
**How were they able to do this?**

One respondent said, "With utilizing these different channels, we've been able to put all the tools we're using together so customers get a consistent way of contacting us, acquiring information, and getting help. All the tools we use can be used with other platforms, so that has streamlined our entire customer service process."

Another said consistency across channels requires focus from all staff members to make sure that every touch point with customers is easy, honest, and addresses their needs and concerns: "This helps us deliver on promises and to foster relationships."

*Fig. 25*

**In the past 12 months, which of these common customer service and support challenges have you been most successful in overcoming?***

Becoming a more "customer-centric" organization — 10%

Delivering a consistent customer experience across all channels — 30%

Obtaining a complete single view of the customer experience company-wide — 11%

Understanding diverse customer expectations and how to meet them — 21%

Having a reliable and actionable way to measure customer satisfaction — 14%

Getting your company to truly listen to what customers want and act on it — 14%

*Question was only asked to those in a customer service or support role.*

**Key tip: consistent, clean, quality data is essential**

Integrated channels of communication are both a critical and a strategic accomplishment. When we overlay the goal of integrated communication with issues of data quality discussed earlier in this survey report, the importance of consistent, clean, quality data becomes even clearer.

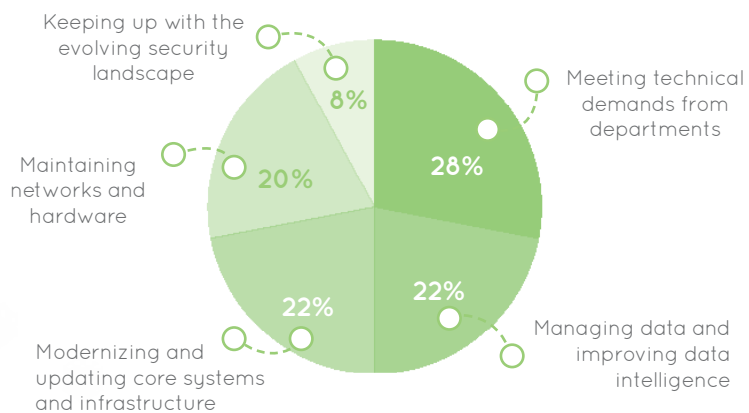# Top Successes for IT Personnel

## Meeting technical demands

In the ever-changing landscape of the IT world, those in an IT role are pulled back and forth from one department to another. In fact, meeting technical demands from departments was the biggest challenge IT professionals faced in the past year, but also the one they were able to overcome the most.[F26]

## How were they able to do this?

Some attribute open communication and third-party tools to their success. One respondent said simply adding more employees did the trick: "We have been slowly growing our Salesforce support team to meet the requests from departments. It takes time to recruit, hire, and train people."

*Fig. 26*

**In the past 12 months, which of these common IT challenges have you been most successful in overcoming?\***

- Keeping up with the evolving security landscape — 8%
- Maintaining networks and hardware — 20%
- Meeting technical demands from departments — 28%
- Modernizing and updating core systems and infrastructure — 22%
- Managing data and improving data intelligence — 22%

*\*Question was only asked to those in an IT role.*

# Standards and policies inhibit the highest level of data security

For roughly half of IT professionals (47 percent), security standards and internal policies limit their efforts to employ the highest level of data security possible.[F27] A lack of budget for security software and sharing of passwords and login IDs prove to be further limitations.

The results align with what we hear almost daily in the news about network and online security breaches. Finding a balance between the highest levels of security possible, functional effectiveness for users throughout a network, and cost effectiveness remain significant issues for IT professionals.

*Fig. 27*

### What is the biggest culprit that prevents your company from maintaining the highest level of data security?*

| | |
|---|---|
| Security standards and policies | 47% |
| Lack of budget for security software | 19% |
| Sharing of passwords and login IDs | 12% |
| Lack of backups | 10% |
| Other | 12% |
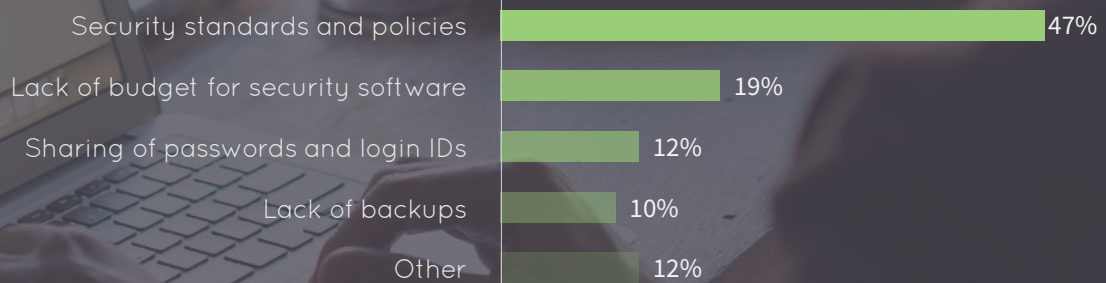
*Question was only asked to those in an IT role.*

# Top Successes for Upper Management & Executives

**Retaining employees and handling information overload**

For those in an upper management and executive roles, there were two big hurdles that held equal weight, but also had the greatest potential for success. Respondents in this category said retaining employees and handling information overload were the biggest roadblocks, but they also reported those hurdles were surmountable.[F28]

**How were they able to do this?**

To ensure employees stay on board, managers are quick to name the company culture as an attributing factor: "We have an open, transparent, and active company culture," one wrote.

Others said being flexible is key: "We are a flexible company when it comes to work schedules. We also work to invest in the lives of our employees."



*Fig. 28*

**In the past 12 months, which of these common managerial challenges have you been most successful in overcoming?***

- Managing and implementing virtual offices — 6%
- Controlling expenses — 10%
- Recruiting talent — 11%
- Maintaining revenue growth — 18%
- Retaining employees — 28%
- Handling information overload — 28%

*Question was only asked to those in an upper management or executive role.*

To handle information overload, managers turn directly to Salesforce: "We use Salesforce to collect and combine data in one place, which enables us to use the data to produce informative and accurate reports."

**"We also work to invest in the lives of our employees."**

Another respondent said his organization simply reduced the amount of data it has by getting rid of duplicate information. Now they only work with relevant data.

# To foster growth when first starting a business, document processes and have the right metrics in place

If those in an upper management or executive roles could go back to Day 1 of their businesses, they'd place more emphasis on documenting processes and ensuring the right metrics were in place. [F29] Ranked lower than documentation and metrics were investing in better technology or adding supplemental tools/ software in order to help cultivate growth. Finally, the hiring of better leaders or more individuals in leadership positions was ranked lowest, although we can probably presume these tasks remain critical and important in the overall scheme of things.

*Fig. 29*

## What do you wish you would have done on Day 1 to help foster growth?*
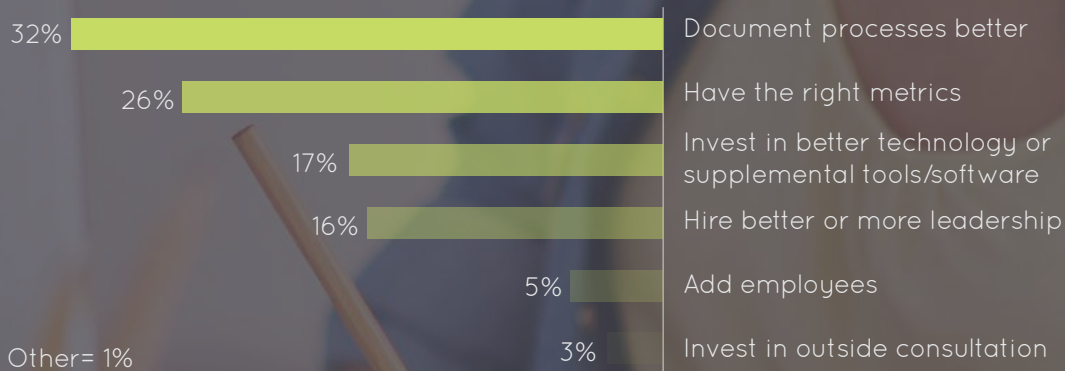
| | |
|---|---|
| 32% | Document processes better |
| 26% | Have the right metrics |
| 17% | Invest in better technology or supplemental tools/software |
| 16% | Hire better or more leadership |
| 5% | Add employees |
| 3% | Invest in outside consultation |

Other= 1%

*Question was only asked to those in an upper management or executive role.*

# *Looking Towards the Future*

What are users hoping to achieve with their orgs over the next year? What are the top priorities among Salesforce users?

# Predicting data growth

A majority of respondents (66 percent) believe their data will grow by at least half in the next 12 months.[F30] Those in an upper management and executive roles have the highest confidence that data will double in size within the year (17 percent).

**That's a lot of data!**

An organization that has 100,000 records and a 50% growth rate can expect to have over a million records in just six years. It is striking that on one hand we're hearing from survey participants that they need a greater variety of data points within the dataset they currently have and not just more data, while on the other hand the same participants are expecting what can be considered fairly high rates of growth in their data sets.

**Fig. 30**

### How much do you expect your data to grow in the next 12 months?



Legend: Total, Salesforce pro, Marketing, Sales, Customer Service & Support, IT, Upper Management / Executive, Other
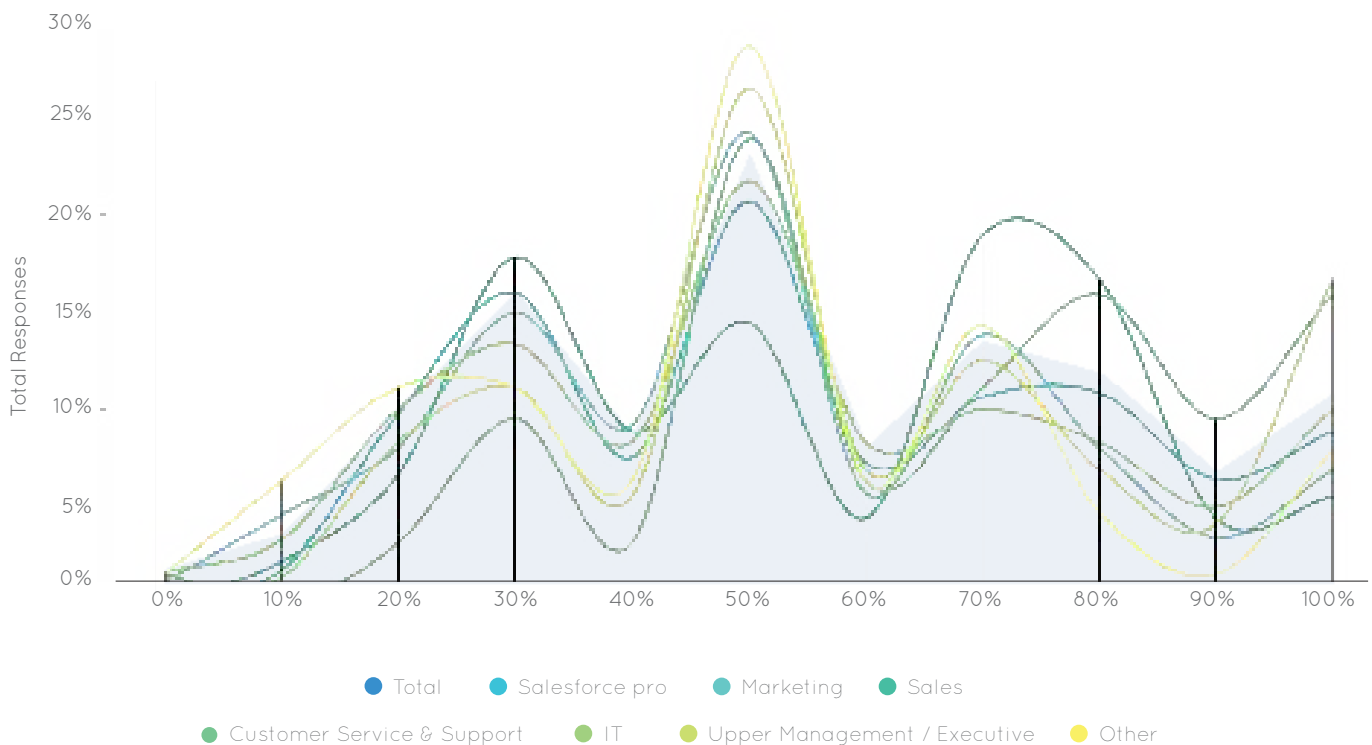
# Preparing for data growth

One aspect of data quality that organizations struggle to get right is making sure new data does not become an interruption. You do not want new data to inadvertently trigger workflows (unless designed to do so), create duplicates, or clutter your org.

## Most are not ready

According to the survey, almost half (46 percent) of Salesforce users currently do not have processes in place to prepare for data growth.[F31]

**Fig. 31**

**Do you have processes and steps in place so that new data will not create problems, like ensuring data quality, deduplication, accessibility, syncing, etc.?***
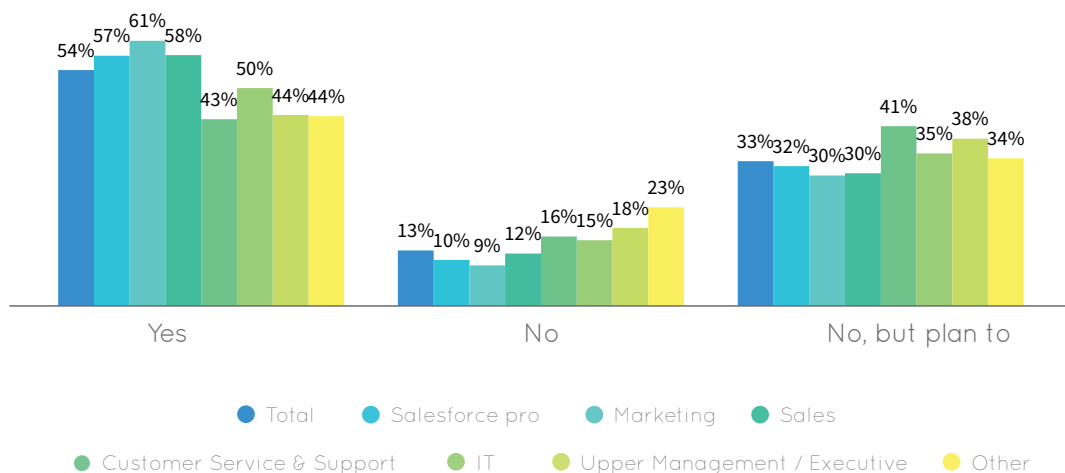


*\*Question was asked to those who answered 10% or greater in Figure 30.*

## What should users do?

The results suggest organizations should make an effort to maintain data quality by creating policies that standardize how new data is brought into Salesforce, and how existing data is updated.

These processes could include matching new records against existing records to

prevent duplication, creating triggers and validation rules, and ensuring workflows are setup correctly. Consider standardized fields and pick list options. Think about auditing individual fields to keep things as uniform as possible. Finally, take a step back and think about how you intend to use the data and what purpose it serves in your organization.

A common theme seen among those who do take measures to ensure that new data does not interfere with operational effectiveness and compromise the quality of the data set, is ensuring that new data is clean and unique: "We have a data warehouse where everything is staged and cleaned before loading into Salesforce. Everything is tested in a sandbox prior to feeding it to our production org," one respondent said. Another said, "We work with a vendor to supply new contacts, and they do an excellent job of verifying the data. We've also standardized important fields and use picklists wherever possible."

No matter how much or how little your data grows, it's also important to consider the utility that new data will provide to your organization: "The new data and fields we add are only to help with the information we collect, rather than clutter it even further. We also make sure new dupes are not being created."

## *"We constantly monitor our database to ensure dupes are kept to a minimum."*

SEE HOW

## top priorities

01. Better understand data
02. Data cleansing
03. Reconcile data
04. Acquire more data
05. Enrich data

## What's important to Salesforce users?

Overall the main goal for the Salesforce users who responded to our survey is to work better, more effectively, and more efficiently with the data they already have, and then to build upon it with more data.

### Gain a better understanding

When asked if they were actively working on plans to better understand the data they have and to improve upon it, 86 percent of respondents say they are currently developing data quality and data improvement strategies, or that they plan to do so within the next year.[F32] Survey responses indicate a high commitment to employing better data quality methodologies, however, the same data suggests some uncertainty about how to proceed.

### Clean the data

Beyond simply coming up with a data

strategy, respondents report data cleansing is the second most common practice for Salesforce users. Eighty-five percent say they currently (or plan to) make efforts to deduplicate, organize, and consolidate records.

### Consolidate data

A significant challenge for Salesforce data stewards seems to be data that is dispersed among disparate system with no true integration and no clear idea for what the source of records should be. A large majority of Salesforce users (81 percent) say they are currently reconciling data (or plan to) from other sources and systems into Salesforce.

### Get more data and enrich it

When it comes to simply adding new data, or enriching data that currently exists, these goals rank below developing an overarching strategy and cleansing

of the data currently held in Salesforce and other systems. Still though, a majority of survey participants report they are or plan to implement a data acquisition and/or enrichment plan.
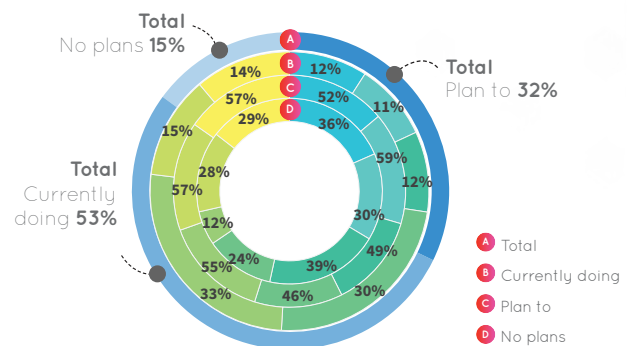
**Fig. 32**

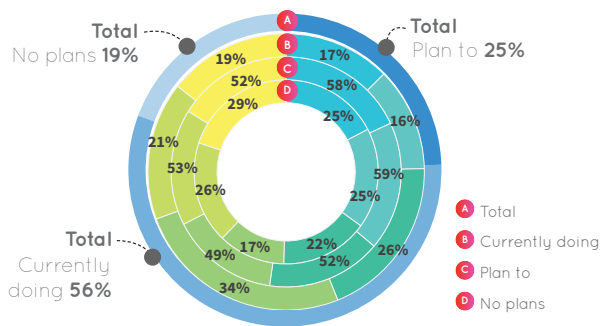## Do you plan to do any of the following in the next 12 months?
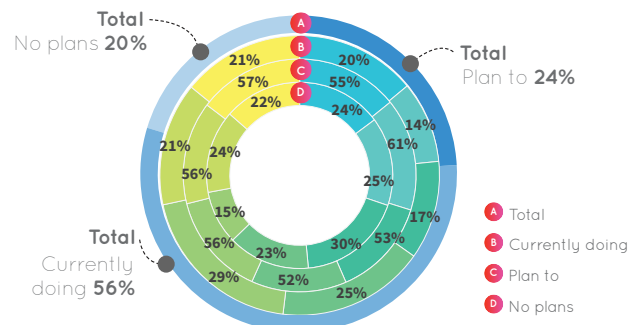
### Develop ways to better understand data



Total No plans 14%
Total Plan to 33%
Total Currently doing 53%

46% 53%
41% 33%
13% 14%
62% 30% 56%
7% 14%
31% 18% 35%
18% 47%
28%
53%

A Total
B Currently doing
C Plan to
D No plans

### Data cleansing



Total No plans 15%
Total Plan to 32%
Total Currently doing 53%

14% 12%
57% 52%
29% 11%
15% 36%
28% 59%
57% 12%
12% 30%
24% 49%
55% 39%
33% 46% 30%

A Total
B Currently doing
C Plan to
D No plans

### Reconcile data



Total No plans 19%
Total Plan to 25%
Total Currently doing 56%

19% 17%
52% 58%
29% 25%
21% 16%
53% 59%
26% 25%
49% 17%
34% 22% 26%
52%

A Total
B Currently doing
C Plan to
D No plans

### Acquire more data



Total No plans 20%
Total Plan to 24%
Total Currently doing 56%

21% 20%
57% 55%
22% 24%
21% 14%
24% 61%
56% 25%
15% 17%
56% 23% 30% 53%
29% 52% 25%

A Total
B Currently doing
C Plan to
D No plans

### Enrich data



Total No plans 30%
Total Plan to 30%
Total Currently doing 40%

38% 30%
43% 37%
19% 33%
17% 22%
36% 47%
47% 31%
24% 32%
36% 21% 25% 43%
41% 40%
39%

A Total
B Currently doing
C Plan to
D No plans

● All respondents
● Salesforce pro
● Marketing
● Sales
● Customer Service & Support
● IT
● Upper Management / Executive
● Other

# Other items on the to-do list

Digging deeper into what Salesforce users will be doing, we asked respondents to tell us if the following role-specific goals are on their 12 month roadmap.
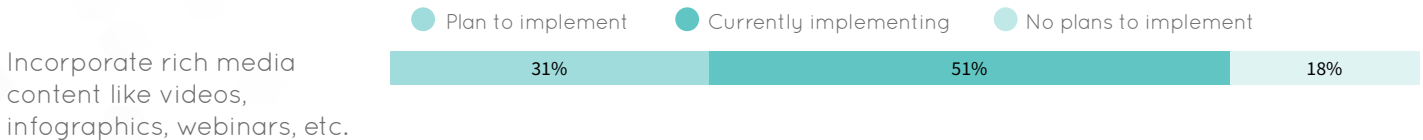
**Fig. 33**

### Salesforce professionals

● Plan to implement　　● Currently implementing　　● No plans to implement

| | | | |
|---|---|---|---|
| Develop and enforce standards and procedures among Salesforce users | 28% | 65% | 7% |
| Increase user adoption of Salesforce | 28% | 59% | 13% |
| Perform an audit to understand problem areas | 34% | 41% | 25% |
| Switch my org to Lightning Experience | 39% | 16% | 46% |

**Fig. 34**

### Marketing professionals

● Plan to implement　　● Currently implementing　　● No plans to implement

| | | | |
|---|---|---|---|
| Incorporate rich media content like videos, infographics, webinars, etc. | 31% | 51% | 18% |

**Fig. 35**

### Sales professionals

● Plan to implement　　● Currently implementing　　● No plans to implement

| | | | |
|---|---|---|---|
| Commit to entering more data into Salesforce | 23% | 67% | 10% |

**Fig. 36**

### Customer service and support professionals

● Plan to implement ● Currently implementing ● No plans to implement

Invest in new technologies to help deliver a better customer experience and support efforts

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 32% | 41% | 27% |

Shift from a transactional, "serve the masses" approach to a more personalized and conversational customer journey

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 25% | 55% | 20% |

**Fig. 37**

### IT professionals

● Plan to implement ● Currently implementing ● No plans to implement

Invest in software or services to increase data security and privacy

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 18% | 45% | 37% |

Update core systems, software, and networks

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 22% | 60% | 18% |

**Fig. 38**

### Upper management and executive professionals

● Plan to implement ● Currently implementing ● No plans to implement

Hire outside talent or consultants

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 19% | 29% | 51% |

Automate tasks to replace the role of employee(s)

| Plan to implement | Currently implementing | No plans to implement |
|---|---|---|
| 21% | 31% | 49% |

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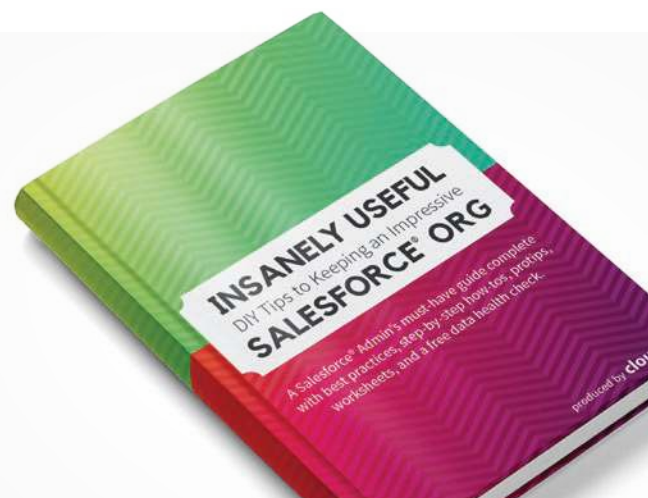
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# Conclusion

# Main Takeways

In general, this year's survey demonstrates a widespread commitment on the part of users to the Salesforce platform, but that commitment carries with it some significant challenges.

In its most global sense, data quality appears to be the single greatest concern for Salesforce users. In multiple and various ways, respondents have expressed doubts about the usefulness and reliability of the data housed in their Salesforce orgs. Data sets are rife with duplication, incompleteness, and lacking in actionable data points.

Further complicating things is that a large portion of respondents note they are challenged with no single source of truth to their data, despite efforts to make the Salesforce CRM the source of record.

### Snowball effect

We also conclude from this survey that all of these problems, if left unattended, will likely grow increasingly worse. Nearly all of our respondents report they expect their datasets to grow by at least some degree, and that their reliance on available data for all business operations will grow stronger.

### What's left to do?

Based on analysis of these results, our strongest recommendation is for Salesforce admins, as well as users and executives who rely on Salesforce, to make a commitment to improving the quality of their data in all ways possible. This means that organization will need to prioritize data improvement objectives *and* to allocate the proper resources to make raising data quality levels actually happen.

### Step 1

The first step to improving data quality is to understand your data challenges. What are users complaining about? What are their frustrations? Think about instances

where you need to do one-off corrections like deleting a record, deduping records, or correcting field values. More than likely those one-off corrections are frequent occurrences in your data and can be good hints as to where your data problems stem.

### Step 2

Once you've identified your problems, it's time to take action. The best place to start, and the most common strategy, is to dedupe records. However, some methods that you may have not previously considered are to validate and standardize mailing addresses and geocode. This will give you a more complete record which can also lend to further deduplication.

### Step 3

Finally don't be afraid to update or delete records that are no longer useful. For example if you only use phone and email to contact customers, and you have records with no valid phone number or email address, there's no way to contact them.

## Rinse and Repeat

An important thing to remember is that this is not just a one-time process. Employing these strategies is a recursive process and needs to happen on a frequent basis to ensure data stays clean. Consider what those intervals will look like when you're putting together a plan around improving and maintaining the quality of your Salesforce org.

# About symphonicsource

Symphonic Source, Inc. delivers a full range of data management and data quality tools and services, from data cleansing and integration, to deduplication and standardization, enabling users to realize the full potential of cloud-based and service-oriented architectures (SOA). Our mission is to provide customers with resources to manage the exponential growth in data, saving time and money, and adding efficiency.

Our self-serve data quality products, Cloudingo, DupeCatcher, and Cloudingo Studio make it possible to eliminate and prevent duplicate records and manage data in the Salesforce CRM database. Our customized data management services make it possible for small to enterprise level organizations to fully take advantage of their investment in valuable data resources.

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