CLEAN YOUR DATA FOR A BETTER CRM

Data.com Clean provides the solution to poor CRM data quality by filling in missing information, standardizing key individual and account-level fields, and keeping your data up-to-date over time, so that your data is more usable, reliable and relevant. And because Data.com Clean makes your customer data more complete and current, it will be more actionable, particularly for Marketing and Sales.

Data.com Clean offers a number of ways to update and enrich records. Users can clean individual records manually or clean groups of records from a list view. Your Salesforce Admin can also schedule automated jobs to regularly check your customer data against Data.com, along with configuring rules for what to do when differences are detected. This guide will offer tips for getting started, and point you to helpful resources for making the most of your investment in Salesforce and Data.com.

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An important first step with Data.com Clean is demonstrating the power and value of cleaning a record. The fastest and easiest way to do this is by enabling both the Clean status field and Clean button, giving users the ability to manually check individual records against Data.com. This capability will remain important as record owners continue to monitor and keep data up-to-date. To get started:

1. Learn about Clean statuses.
2. Learn how to configure page layouts to include the Clean button.
3. Get familiar with the process for comparing data between your Salesforce instance and Data.com.
4. Learn how to clean a list of records.
PREPARING FOR AUTOMATION: THE DATA.COM ASSESSMENT APP

After you’ve enabled and made yourself familiar with how Data.com Clean works for individual records, you’re in a good position to begin automating the process. It’s wise to start by determining the current state of your customer data in Salesforce.

The **Data.com Assessment App** is a great tool for this. It helps you see if there are data gaps that will impede the ability of Clean to consistently match against your account, contact and/or lead records. It also gives you benchmarks, or a “before” picture, to measure against as you make improvements.

The “CRM Data Health Rating” is a great overall measurement of the state of your data. The “Unmatched” tab in the assessment results will show you the state of key data fields that may affect your match results. **Learn more about how Clean matches your records** against its referential data set.
USING AUTOMATION: RUNNING CLEAN JOBS

1. **Understand Clean job preferences** and the differences between flag-only, flag and auto-fill blanks, and overwriting fields.

2. **Define Clean job preferences** at the object level (accounts, leads, contacts) or at the individual field level.

3. Consider enabling the Dun & Bradstreet DUNSRight™ matching service to more accurately match account records and set confidence thresholds.

4. If you use custom fields, review how field mapping works and determine whether you need to customize your field mapping.

With all your preferences configured, you’re ready to go ahead and **schedule Clean jobs**.

To get maximum value from Data.com Clean, your next step is to dive into configuring preferences and preparing your system for running Clean jobs. Cover the following items to set preferences for Clean jobs:
STAYING CLEAN
REPORTING AND MAINTENANCE

Data.com Clean includes some valuable out-of-the-box reporting that can help you more efficiently maintain and improve the quality of your customer data:

- **Data.com Clean Metrics and Analytics** can be found in the Data.com Administration menu under “Clean.” Here you’ll get an overview of the number of accounts, contacts and leads that have been processed, matched and updated.

There are additional and more advanced reporting packages available via the Salesforce AppExchange:

- **Data.com Clean Reports** - Free package of reports and associated dashboards that provide valuable insight on how Data.com improves the quality and completeness of your customer data.

- **Data.com Premium Reports** - Free package for Data.com Premium Clean (and Premium Prospector) customers with dashboards and reports providing insights on how your records match to key Dun & Bradstreet company data.

After putting reports in place and analyzing results, it’s crucial to remember that maintaining data quality requires continued and consistent effort. Establish an iterative process for reviewing these reports (along with regularly running the Assessment App for updated field-level metrics), to determine any adjustments needed to improve your Clean results.
WANT TO LEARN MORE?

Join the Data.com Group on the Salesforce Success Community website

Get the facts on your CRM data quality with the Data.com Assessment App