

# 10 Tips for Better Salesforce Reporting

Successful Reporting Starts with Great Data. Our 10 Tips Show You How.

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## Executive Summary

Salesforce is at the heart of customer interactions across a variety of touch points. From marketing and sales to service, Salesforce is a critical business tool. Many businesses have expanded their use of Salesforce well beyond sales force automation and CRM to leverage Salesforce's marketing automation, helpdesk, analytics, and social community capabilities. Integrating Salesforce with other cloud apps and a variety of data sources enables workers to collaborate and gain insight to deliver a superior customer experience.

But Salesforce reports are only as good as the customer data they contain.

In this white paper, we explain how trusted data is the backbone of accurate Salesforce reports, and describe the 10 essentials for fueling your Salesforce app with great data.

## Are You Confident in Your Salesforce Data?

As Salesforce's value to the business grows, so does the importance of having clean, trusted data. The challenge is escalating. Fully 76 percent of businesses struggle with integration and data quality, according to Bluewolf's *The State of Salesforce Report, 2015-2016*<sup>1</sup>, a survey of more than 1,500 Salesforce customers.

### Biggest barriers to deriving business insights from Salesforce data

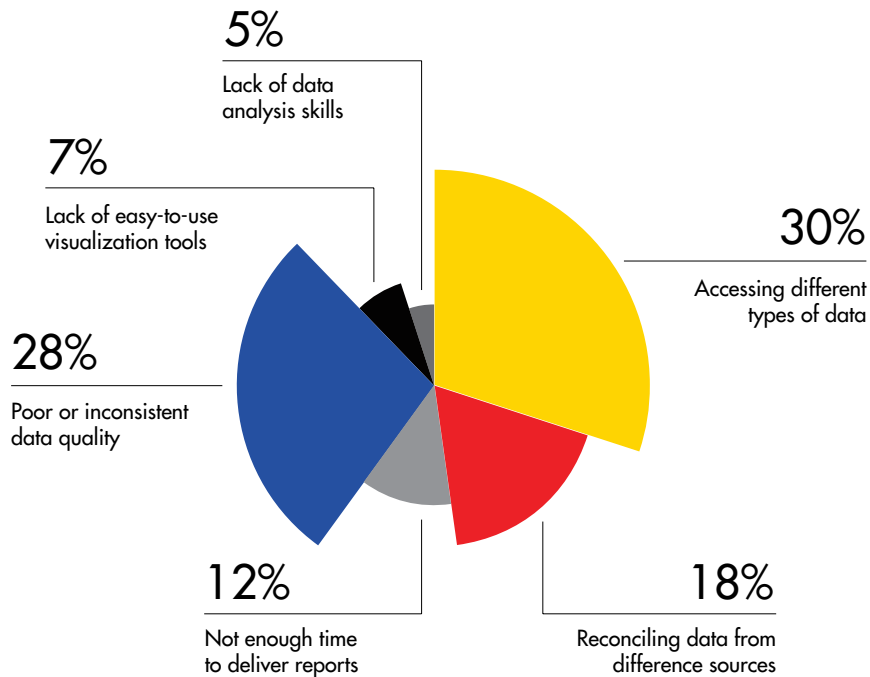


Figure 1. Data integration and data quality issues hinder business value. Source: *The State of Salesforce Report, 2015-2016*, Bluewolf.

<sup>1</sup> *The State of Salesforce Report, 2015-2016*, Bluewolf

As businesses use Salesforce in new and sophisticated ways for sales, marketing, support and collaboration, complexity is growing. For instance, businesses often customize their Salesforce instance to better fit the way they operate and embrace cloud apps that integrate with Salesforce. An unintended consequence is that customer data may now exist in multiple systems, and an update to one customer record may not be reflected in other systems. Conflicting or duplicate views of customer data are the result.

The nature of business is dynamic. Companies enter new markets and geographic regions. Mergers and acquisitions occur. This growth and change can lead to conflicting or duplicate customer data as different applications are integrated into Salesforce. And, of course, as workers use Salesforce from their laptops, smartphones and desktops, duplicate records can be entered and data entry errors occur, especially on small screens.

## Accurate Reports Rely on Trusted Data

As businesses drive more value from their Salesforce investments, the issue of having clean, trusted data for accurate reports and decision making is a growing. For example, the top two channels for both B2B and B2C marketers continue to be social media and email marketing in 2015<sup>2</sup>. With buyers and consumers being the targets of this focus, it's crucial that marketers can be heard above the noise by delivering relevant and personalized content. And the key to that is being able to build a 360-degree of their customers from trusted data that is current and connected.

However, six out of ten marketers surveyed by Bluewolf cite poor or inconsistent data quality, or lack of data as their biggest challenge to producing personalized campaigns.

And marketers aren't unique in requiring data quality. Of the Salesforce customers surveyed by Bluewolf, almost a third (28 percent) blamed poor or inconsistent data quality as the biggest barrier to deriving business insights from Salesforce data. And this makes it hard for businesses to truly benefit from their investments in analytics and visualization tools.

Data quality drives successful Salesforce reporting. For many employees, using reporting in Salesforce is a daily activity, but it is a time-consuming one. In *The State of Salesforce Report*, data management and reporting were named as users' top time-consuming tasks. By making interactions with Salesforce more efficient, employees are free to spend more time with customers. Data is more accurate so people can make better decisions. Giving workers the tools they need to be productive not only increases satisfaction, but also is critical to attract and retain the best talent.

<sup>2</sup> 2015 B2B and B2C Content Marketing Trends–North America: Content Marketing Institute/MarketingProfs

## Top priorities for data-driven marketers, 2015-2016

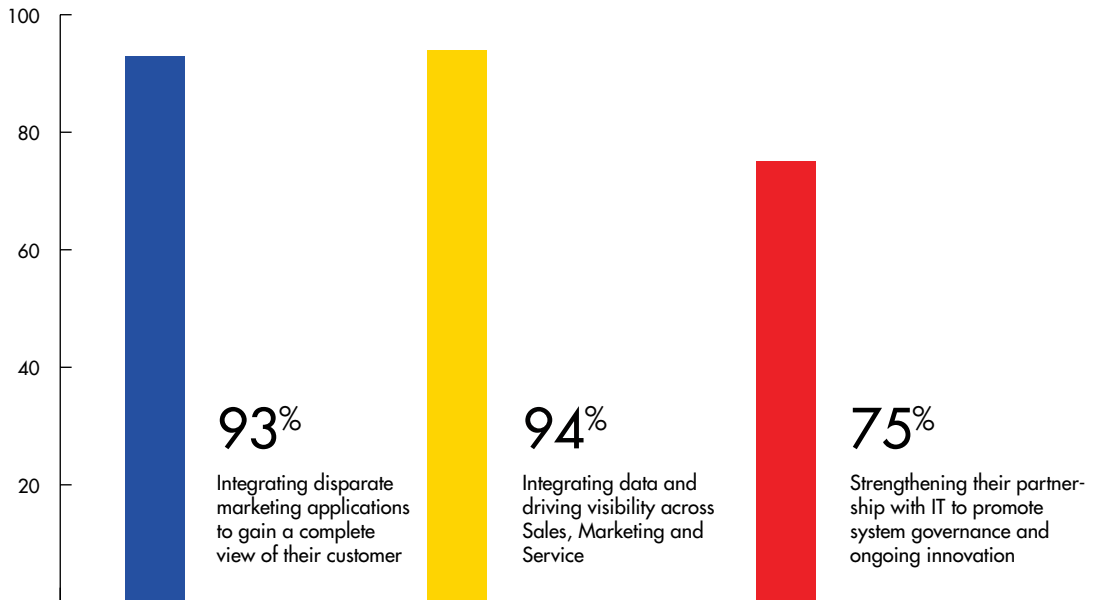


Figure 2. Data integration and IT partnership are key priorities for marketers. Source: *The State of Salesforce Report, 2015-2016*, Bluewolf.

## 10 Best Practices for Salesforce Data Quality

Getting better reporting from Salesforce is predicated on better data management. Here are 10 best practices to get started.

1. **Identify a data steward.** Designate one person as ultimately responsible for the quality of the data in Salesforce is your first step. The data steward is often the Salesforce administrator, but the steward may be someone from sales, marketing, or even a consultant.
2. **Perform a data assessment.** Do you know how good (or bad) your Salesforce customer data is? It's important to benchmark your Salesforce data so you know what challenges lay ahead—and can develop a plan to get there. Start with your most important customer data and use database query or data profiling tools to determine how much of the data is good, bad or missing.
3. **Standardize your data fields.** Making sure your data formats are consistent can be a major effort—but it's a necessary one. Ensuring that your customer data fields, such as countries, territories, states and provinces, all follow a standardized format and naming convention is critical for consistent reporting and customer interaction.
4. **Validate data values.** Bad data can creep into Salesforce. Email addresses are mistyped. Different countries use different formats for phone numbers. Once incorrect or inconsistent data is entered into Salesforce, it's critical to correct it. By using field validation rules or solutions that automatically validate and correct physical and email addresses, you can ensure that accurate and up-to-date customer data.

5. **Enrich your data.** After you master your Salesforce data, you can enrich your data with other sources, such as demographic, behavioral, transactional, or other data. This allows you to create a more complete picture of your customer and personalize messaging and marketing offers. Automatically adding data, such as a company's DUNS number or adding a missing country code, also improves the quality of data and reporting.
6. **Selectively replicate and synchronize data.** Administrators can selectively replicate and synchronize their Salesforce data to an on-premise database or files for reporting. Scheduling and automating this replication can help keep data is up-to-date without the performance penalty of replicating all data—or overseeing the synchronization.
7. **Formalize a deduplication strategy.** Duplicate records aren't just an annoyance. Duplicate records make it harder for marketing departments to track campaign success. For sales, duplicate leads and accounts can result in account ownership conflicts and inaccurate forecasts. Duplication may occur because of slightly different names or variations of spelling or because a user didn't check to see if the record already existed before entering. Multiple requests from the same prospect or customer coming in from a website can also result in duplication, as does importing purchased lists. Develop your strategy for handling duplicates. For instance, do you append the data from duplicate leads or just delete them?
8. **Cleanse data before mastering.** Cleanse the data as much as possible before creating a master golden record. Using master data management tools to automatically cleanse, consolidate, and manage hierarchies in Salesforce allows you to create a 360-degree view of the customer. This makes it easier to understand and visualize the relationships among customer records. This makes it easier to create reports by different countries, sales territories or different subsidiaries to identify new opportunities or up-sell and cross-sell customers.
9. **Trap quality errors on data entry.** Create validation rules for forms to ensure that clean data is entered in the first place. Using an address validation solution makes it easy to quickly and easily validate and correct address, email, and phone data in Salesforce.
10. **Rinse and repeat.** Making sure that your Salesforce data is clean and trustworthy is not a project that takes place once a year. It is a continuous effort. People move, companies get bought, and new products are introduced. By using master data management, you can simplify the process of making data cleansing an ongoing effort—and one that is efficient and automated, rather than manual and resource draining. Marketing, sales, service and other departments will have accurate, trusted reports to make better decisions and respond more quickly to customers.

## Percentage of companies that change their Salesforce instances monthly

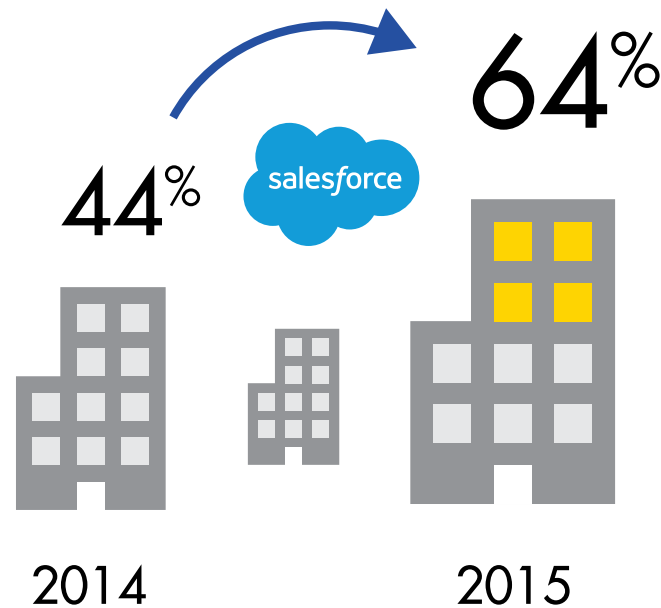


Figure 3. Continuous innovation enables businesses to be nimble. Source: *The State of Salesforce Report, 2015-2016*, Bluewolf.

## Better Data Empowers Salesforce Users

The challenge of trusted reporting for Salesforce is growing, as organizations increasingly refresh their Salesforce instance and are adding more capabilities. According to *The State of Salesforce Report*, 64 percent of companies release changes to their Salesforce instance at least monthly, up from 44 percent in 2014. Continuous innovation enables organizations to be more nimble in achieving their goals for growth and profitability. By following best practices for information governance and data quality, businesses can make the most of their Salesforce investment to increase marketing ROI, drive more sales and deliver a superior customer experience.

### Next Step

Take the first steps to achieving cleaner, more connected data within your organization, register for 30 day free trial at [informatica.com/cloud-trial](http://informatica.com/cloud-trial) today.



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