

Case Study: Improving Salesforce Data Quality with Felixio Data Completeness Monitor

Overview

This case study demonstrates how an organization improved data quality, user adoption, and reporting accuracy by implementing **Felixio Data Completeness Monitor**. The solution enabled structured configuration, real-time completeness visibility, and scalable governance across multiple objects and record types.

Customer Profile

Industry: Professional Services (B2B)

Org Size: 250+ Salesforce users

Salesforce Usage: Sales Cloud and Service Cloud across Account, Contact, Lead, and Opportunity

Key Stakeholders:

- Salesforce Admin Team
- Sales Operations
- Business Leadership
- Frontline Sales and Service Users

Business Challenge

The customer faced several common data quality challenges:

- Inconsistent data entry across teams
- Missing critical fields on key objects
- No visibility into data completeness at the record level
- Difficulty enforcing different rules per Record Type
- Inaccurate dashboards and unreliable reporting

- Admins spending significant time manually auditing data

As the organization scaled, these issues began to directly impact forecasting accuracy, customer experience, and leadership decision-making.

Objectives

The customer wanted a solution that would:

- Measure data completeness in a clear and transparent way
- Support **default and Record Type–based configurations**
- Provide **real-time scorecards** directly on records
- Empower admins with flexible configuration controls
- Improve user accountability without heavy customization
- Increase overall trust in Salesforce reporting

Solution: Felixio Data Completeness Monitor

The organization implemented **Felixio Data Completeness Monitor** to establish structured data governance and ongoing monitoring.

Key Capabilities Used

- **Configurable Data Completeness Rules**
 - Admins created object-level configurations for Account, Contact, and Opportunity
 - Fields were assigned weights based on business importance
- **Default and Record Type–Based Configurations**
 - Separate rules were applied for:
 - Enterprise vs SMB Accounts
 - New Business vs Renewal Opportunities
 - This ensured data requirements matched real business processes

- **Real-Time Record-Level Scorecard**
 - Users could see completeness directly on the record page
 - Clear visibility into missing or incomplete fields
 - Encouraged proactive data correction
- **Dashboards and Monitoring**
 - Leadership gained visibility into overall data health
 - Admins tracked improvement trends over time

Results & Impact

Within the first few weeks of rollout, the customer observed measurable improvements:

-  **35% increase in overall data completeness** across priority objects
-  **More accurate dashboards and reports** trusted by leadership
-  **Reduced admin effort** spent on manual audits and validation
-  **Improved user accountability** through transparent scorecards
-  **Better adoption of required fields** aligned to business process

Sales and Service teams began proactively improving their records rather than reacting to downstream issues.

Why Felixio Data Completeness Monitor

The customer selected Felixio Data Completeness Monitor because it:

- Is fully Salesforce-native
- Requires no heavy customization
- Offers flexible configuration for complex orgs
- Supports scalable governance as the business grows
- Provides immediate value to both admins and end users

Conclusion

By implementing **Felixio Data Completeness Monitor**, the organization transformed Salesforce from a system with unreliable data into a trusted platform for decision-making. The combination of **smart configuration, record type flexibility, and real-time visibility** enabled sustainable improvements in data quality.

Felixio Data Completeness Monitor continues to support ongoing data governance as the organization evolves.