

Data Steward Agent

AI-Powered Data Stewardship for Salesforce

Data Steward Agent for Agentforce

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The clearMDM Data Steward Agent works alongside human data stewards to help organisations maintain trusted Salesforce customer data at scale.

Built natively on Agentforce and integrated directly with clearMDM Operational MDM, the Data Steward Agent enables teams to resolve data quality issues faster, automate stewardship decisions and continuously govern trusted customer data inside Salesforce.

Unlike traditional data quality tools that rely entirely on manual review processes, the clearMDM Data Steward Agent combines AI-guided stewardship with governed Operational MDM processes to support Customer 360, Agentforce and Data Cloud initiatives.

Key Capabilities

AI-Guided Duplicate Resolution

Improve stewardship efficiency with AI-assisted match scoring and duplicate resolution.

The Data Steward Agent provides conversational AI guidance and reasoning to help data stewards determine whether matched records should be accepted, rejected or investigated further.

Capabilities include:

- AI-assisted match scoring and reasoning.
- Conversational duplicate review support.
- Additional context for stewardship decisions.
- Reduced manual review effort.

The AI-guided duplicate resolution capability integrates directly into clearMDM matching operations and stewardship workflows.

Automated Data Stewardship Decisions

Scale stewardship processes through AI-driven automation.

The Data Steward Agent can automate stewardship decisions using AI-generated match scoring and reasoning, reducing operational bottlenecks and enabling large-scale stewardship activities.

This capability supports:

- Automated duplicate acceptance and rejection.
- Bulk stewardship processing.
- Reduction of stewardship backlogs.
- Consistent stewardship outcomes.
- Scalable governance processes.

Automated stewardship decisions can be applied in real time during record processing or across existing stewardship queues

Conversational MDM Administration

Configure and manage the MDM configuration using natural language through Agentforce.

The Data Steward Agent supports conversational interactions that simplify:

- MDM Rule setup and configuration.
- Match scoring analysis.
- Governance workflows.
- Stewardship investigations.

Data Quality Monitoring (Coming Soon)

Automatically monitor and improve Salesforce CRM data quality.

Planned capabilities include:

- Detection of incomplete or inconsistent records.
- Data quality monitoring against defined standards.
- Cleanse and enrichment support.
- Exception identification and management.
- Ongoing operational quality monitoring.

Data Governance Monitoring (Coming Soon)

Bridge the gap between governance policy and operational compliance.

Planned capabilities include:

- Governance policy monitoring.
- Compliance metric tracking.
- Retention rule management.
- Governance exception monitoring.
- Operational governance visibility.

Why the Data Steward Agent Matters

Enterprise Salesforce environments often struggle with:

- Large volumes of duplicate review tasks.
- Manual stewardship bottlenecks.
- Inconsistent stewardship decisions.
- Fragmented customer data.
- Limited operational governance.

The clearMDM Data Steward Agent addresses these challenges by combining:

- Operational MDM.
- AI-assisted and AI-automated stewardship.
- Agentforce-native conversational AI.
- Governed Golden Record management.

The result is a continuously governed customer data foundation that improves operational efficiency and supports AI-ready Salesforce data.

AI Match Scoring Explained

When clearMDM creates Matched Record Pairs, a Match Score and Match Status are generated based on configurable matching rules.

Traditionally, human data stewards review these candidate matches manually and determine the next action.

The Data Steward Agent enhances this process by providing:

- AI-generated match scoring.
- Match reasoning and contextual guidance.
- Conversational stewardship support.
- Recommendations for next actions.

This provides data stewards with an intelligent second opinion that helps improve stewardship accuracy and reduce manual effort.

Salesforce Native and Secure

The clearMDM Data Steward Agent operates entirely within the Salesforce and Agentforce shared platform.

Key benefits include:

- Native Salesforce architecture.
- Alignment with Salesforce security controls.
- No external storage of Salesforce customer data.
- Direct integration with clearMDM Operational MDM.
- Real-time operational impact.

The Data Steward Agent extends Salesforce with governed AI-powered stewardship capabilities while maintaining enterprise-grade operational control.

Frequently Asked Questions

How much does it cost ?

A free 5-day trial is available.

Pricing starts from £100 GBP per company per month, with discounts available for nonprofits.

Please contact hello@clearmdm.com for further information.

Which version of clearMDM is required?

The Data Steward Agent requires:

- clearMDM Enterprise Edition
- Version 9.53 or above

The latest version of clearMDM can be installed from the [Salesforce AgentExchange](#).

Is the Data Steward Agent supported?

Yes.

Support is available directly from the clearMDM team.

Please contact:

hello@clearmdm.com

How secure is it?

The clearMDM Data Steward Agent runs natively and securely within Agentforce.

clearMDM does not store or access customer Salesforce data externally.

Where can I find additional help?

Training Articles and implementation guidance are available on the clearMDM website.

You can also contact the clearMDM team directly at:

hello@clearmdm.com

Installation and Setup

[Step 1 — Install clearMDM and the Data Steward Agent](#)

The clearMDM Data Steward Agent is available via the [Salesforce AgentExchange](#).

Requirements:

- clearMDM Enterprise Edition v9.53 or above.
- Installation into a Salesforce Sandbox for trial purposes is recommended.

Release Notes and installation links are available on the clearMDM website.

[Step 2 — Complete Setup Instructions](#)

After installation, setup instructions are required to activate the Data Steward Agent.

Detailed setup guidance is available in this [Training Article](#).

Alternatively, the clearMDM team can assist directly with setup and onboarding.

[Step 3 — Assign Permission Sets](#)

The following Permission Set assignments are required for users who will interact with the clearMDM Data Steward Agent via Agentforce.

- MDM Data Steward
- Agentforce Default Admin

Learn More

Resources

The following links provide additional information.

- [Salesforce AgentExchange Listing](#)
- [Training Articles](#)
- [Release Notes](#)
- [Beyond Deduplication White Paper](#)

Contact

To discuss the Data Steward Agent or Operational MDM for Salesforce:

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