

How SIs Can Deliver the A-Grade Data 360 Outcome

A practical Data 360 best practices scorecard for Salesforce implementation partners looking to move beyond deduplication and deliver trusted, governed customer data for Customer 360 and Agentforce.

What Is the Best-Practice Architecture for Data 360?

For Salesforce implementation partners, **Data 360 best practice** is not simply connecting source systems, harmonising data and building segments and activations. Instead, a holistic approach is preferred with trusted operational data established at source first.

That is where **Operational MDM** fits in. Data 360 creates the customer data layer for harmonisation, identity resolution, insight, segmentation and activation. Operational MDM governs trusted customer data at source, including Golden Records, survivorship rules, stewardship workflows, lineage and relationship context directly inside Salesforce CRM. This complementary approach delivers trusted data to both Salesforce CRM and Data 360 with optimised credit consumption.

The best-practice architecture is clear:

Data 360 activates customer data. Operational MDM makes that data trustworthy before activation.

For Salesforce implementation partners (System Integrators or SIs), this creates a major opportunity. Many Salesforce data-quality conversations still begin and end with deduplication. But customers planning Data 360, Customer 360 or Agentforce need more than duplicate reduction. They need a governed customer data foundation.

Why Deduplication Alone Limits Data 360 Outcomes

Most Salesforce data-quality programmes start with duplicate Accounts, Contacts or Leads. That is understandable. Duplicates are a highly visible pain point, disruptive and often easy to prioritise and action. They affect reporting, user trust, sales activity, service interactions and automation. Native Salesforce Duplicate Rules and Matching Rules can provide useful baseline controls, while third-party deduplication tools can improve match accuracy, scoring, bulk processing and automated merge.

For many Data 360 programmes, that is a valuable step forward. However, deduplication primarily answers one question: Do these records represent the same customer?

Data 360 implementation best practice requires additional questions to be answered:

- **Ownership.** Which system owns each customer attribute?
- **Survivorship.** Which source wins when values conflict?
- **Survivorship.** Which record is the Golden Record?
- **Context.** Which customer relationships matter?
- **Trust.** Which consent value should be trusted?
- **Governance.** Which changes require stewardship review?
- **Downstream.** Which customer data is safe for Agentforce to use?

These are not simply deduplication questions; they are governance questions.

This is why Operational MDM matters. Master Data Management provides the governance discipline for trusted customer data. In Salesforce CRM, **Operational MDM** applies that discipline where users, processes and automation already work.

A Data 360 Best Practices Scorecard for SIs

A useful way for SIs to explain Data 360 maturity is through a simple scorecard.

The goal is not to dismiss integration, harmonisation or deduplication. Each has a role. The point is that different delivery patterns produce different levels of outcome.

Scorecard Level	Typical Data 360 Delivery Pattern	What It Delivers	What Is Still Missing
Connected	Source systems are integrated into Data 360	Data is available for harmonisation, identity resolution and activation	Operational trust issues remain unresolved
Deduplicated	Native or third-party deduplication improves Salesforce CRM hygiene	Fewer duplicates, better matching and cleaner CRM data	Survivorship, Golden Records, stewardship and relationships may still be weak
Governed and Activated	Operational MDM works with Data 360	Trusted customer data at source, unified and activated through Data 360	This is the A-grade Data 360 outcome

Many Data 360 programmes reach the first level. Some reach the second. The opportunity for SIs is to help customers reach the third; the A-grade outcome.

The delivery conversation then changes from: “We connected your customer data.” to: “We created a trusted customer data foundation for operations, activation and AI.”

That is the A-grade Data 360 outcome.

Data 360 Implementation Anti-Patterns

Several anti-patterns regularly limit Data 360 outcomes.

The first is treating **Data 360 as a data-quality fix**. Data 360 is highly valuable for connecting, harmonising, unifying and activating customer data. But it should not be expected to arbitrate every operational ownership, survivorship or stewardship decision after the fact.

The second is assuming that **Data 360 delivers a defragmented operational view**. Unification exists in Data 360 exclusively; duplicates still exist unmanaged and ungoverned in Salesforce CRM. Without a governance layer at source, operational teams, typically the primary Salesforce CRM user population, feel limited direct benefit.

The third is treating **deduplication as a one-off clean-up project**. A bulk merge can improve CRM data temporarily, but customer data continues to change. Without lifecycle governance, stewardship workflows and Golden Record management, the same issues tend to return.

The fourth is confusing **identity resolution with survivorship**. Data 360 may identify that “Jane Smith” in Sales Cloud, “J. Smith” in a support platform and “jane.smith@email.com” in Marketing Cloud relate to the same individual. That is valuable identity resolution. But the business still needs rules to determine which email address, phone number, loyalty ID, consent status or household relationship should be trusted.

The fifth is activating profiles before **operational ownership** is clear. Segments, journeys, dashboards, personalisation and Agentforce use cases all inherit unresolved data-governance decisions.

For SIs, these anti-patterns matter because they can undermine confidence in an otherwise well-delivered Data 360 programme. The platform may be implemented correctly, but the customer experience can still fall short if the source data is not governed.

Why Operational MDM Strengthens Data 360 Architecture

Operational MDM provides the missing trust layer in a Data 360 architecture.

In a best-practice Salesforce data architecture, **clearMDM governs trusted customer data inside Salesforce CRM**, while **Data 360 harmonises, unifies and activates that data across the wider Salesforce ecosystem**.

This separation of responsibilities matters.

Operational MDM creates trust. Data 360 creates activation. Customer 360 needs both.

With clearMDM, Salesforce CRM can maintain governed Golden Records, apply survivorship rules, manage stewardship workflows, preserve lineage and support relationship-aware customer data (households etc.). These capabilities help ensure that CRM users, processes, reports and automations operate on trusted customer records before that data is activated downstream.

Data 360 can then do what it is designed to do: connect broader customer data from across the enterprise, resolve identities, build unified profiles, generate insights, create segments and activate customer context across channels.

This is not a competing architecture. It is a complementary one.

Operational MDM improves the quality and governance of the operational CRM data feeding Data 360. Data 360 then makes that trusted data usable across segmentation, insight, activation and AI-driven engagement.

Operational Benefits Beyond Segmentation and Activation

One reason SIs should care about Operational MDM is that the value extends beyond Data 360 segmentation.

A Data 360 implementation focused only on activation may deliver value to marketing or customer engagement teams. A **Data 360 plus Operational MDM architecture** can deliver value across the broader Salesforce estate.

Sales and service users work with cleaner, more trusted records. Flow logic and automation can rely on governed customer data. Reporting better reflects real customers, households, organisations and relationships. Data stewards have clearer workflows for resolving exceptions. Agentforce has access to more reliable customer context.

That broader operational value is important.

It helps SIs position Data 360 not simply as a data-platform or activation project, but as part of a wider Customer 360 architecture. For retail, financial services, healthcare, communications and other customer-intensive industries, this distinction is critical. Customer data does not only support campaigns. It supports service, compliance, loyalty, fulfilment, personalisation, analytics and increasingly AI-assisted operations.

Data 360 Best Practices for Implementation Partners

For SIs looking to deliver stronger Data 360 outcomes, the best-practice questions are practical:

- Is customer data trusted before activation?
- Are Golden Records maintained inside Salesforce CRM?
- Have survivorship rules been defined by source and attribute?
- Are duplicates merged, mastered, suppressed or retained according to policy?
- Are households, organisations or other relationships modelled?
- Are stewardship workflows operationalised?
- Is Data 360 being used for activation rather than downstream data-quality repair?
- Is Agentforce acting on governed customer context?

These questions help SIs lead a more valuable architecture conversation.

They also help reduce delivery risk. If source data quality and governance are not addressed early, Data 360 may be blamed for problems it did not create. By introducing Operational MDM into the architecture, SIs can help customers resolve trust issues closer to source and deliver a more defensible outcome.

The A-Grade Data 360 Outcome

The A-grade Data 360 outcome is not achieved by ingestion alone. It is not achieved by deduplication alone. It is achieved when trusted operational customer data and activation-ready customer context work together.

In a robust Salesforce architecture:

- **Salesforce CRM** remains the operational environment where users and processes act.
- **clearMDM** governs trusted customer data, Golden Records, survivorship, stewardship and relationships inside Salesforce CRM.
- **Data 360** harmonises, unifies, analyses, segments and activates customer data across the broader ecosystem.
- **Agentforce** operates on governed customer context rather than fragmented or uncertain records.

For SIs, this creates a stronger delivery proposition.

It allows partners to say not only that they can connect systems into Data 360, but that they can help customers build a trusted customer data foundation for Customer 360, Agentforce and AI-driven activation.

Moving Beyond Deduplication With clearMDM

clearMDM is a Salesforce-native Operational MDM platform that helps organisations move beyond point-in-time deduplication towards continuously governed Golden Records, survivorship and relationship-aware customer data inside Salesforce CRM.

For Data 360 programmes, clearMDM complements the architecture by improving the quality, consistency and trustworthiness of operational CRM data before it is harmonised, segmented or activated.

clearMDM also extends this model through the **clearMDM Data Steward Agent for Agentforce**, which supports AI-powered data stewardship use cases such as AI-guided duplicate resolution, conversational stewardship support, AI-generated match reasoning and automated stewardship decisions. The agent works alongside human data stewards to reduce manual review effort, improve consistency and maintain trusted Salesforce customer data at scale.

For Salesforce SIs, the message is straightforward:

Data 360 activates customer data. clearMDM helps make that data trustworthy before activation.

To explore how clearMDM can support Data 360, Customer 360 and Agentforce programmes, find out more on our partners page and request a partner briefing with the clearMDM team.